

Add Name or Description Concatenations to an Assessment

Last Modified on 09/25/2025 3:09 pm EDT

Overview

A concatenation uses data from [properties](#) and [fields](#) to populate the name and description properties of objects.

User Requirements

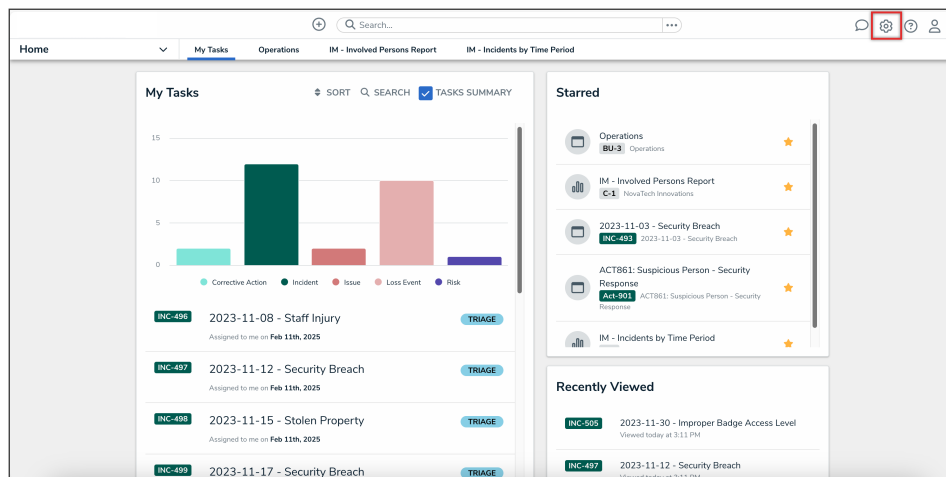
The user must have Administrator permissions in order to access the **Admin Overview** screen.

Related Information/Setup

Please refer to the [Assessment Name & Description Concatenation Overview](#) article for more information on using name and description concatenations.

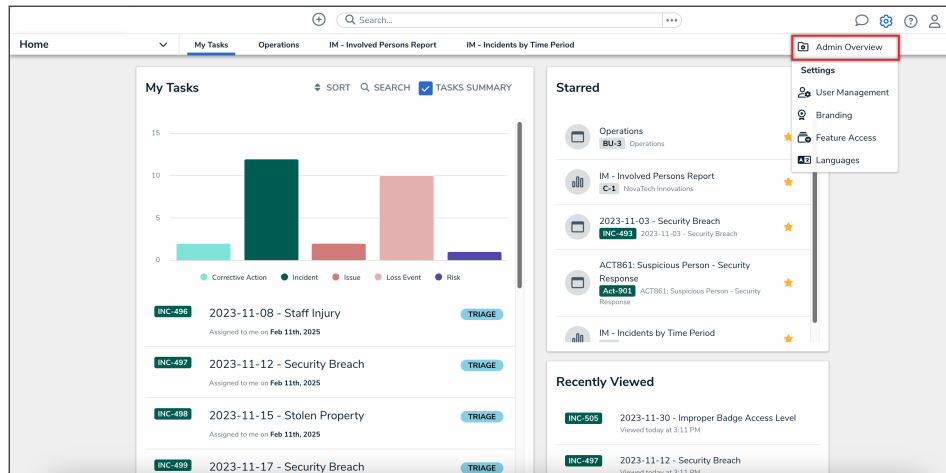
Navigation

1. From the **Home** screen, click the **Administration** icon.



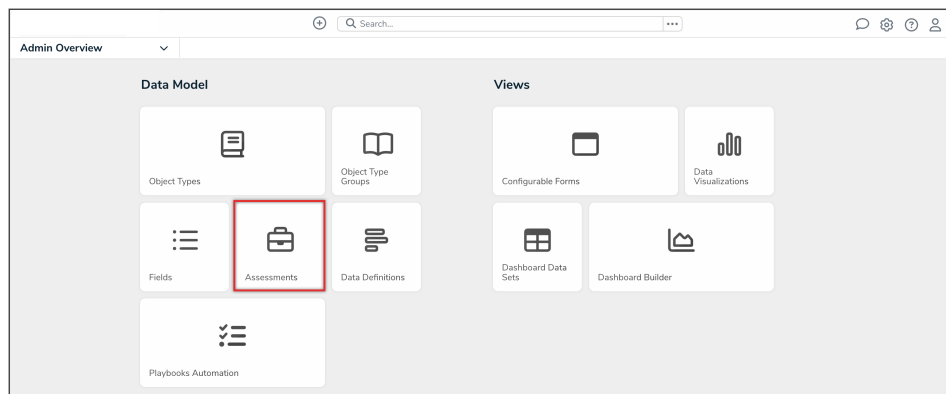
Administration Icon

2. From the **Administrator Settings** menu, click the **Admin Overview** link.



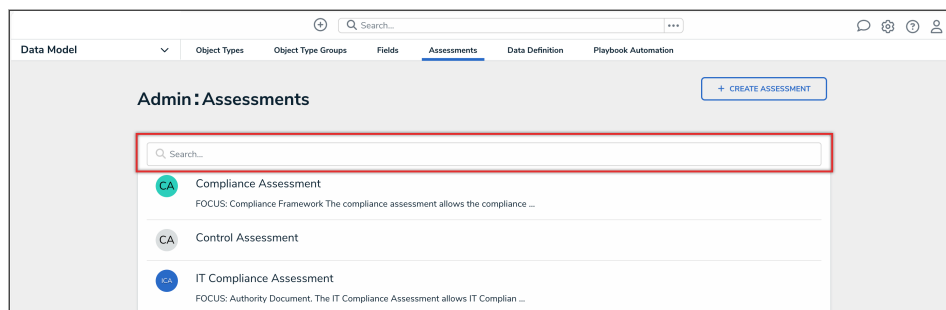
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Assessments** tile under the **Data Model** section.



Assessments Tile

- From the list of assessments, click the assessment that you want to add a name or description concatenation to.



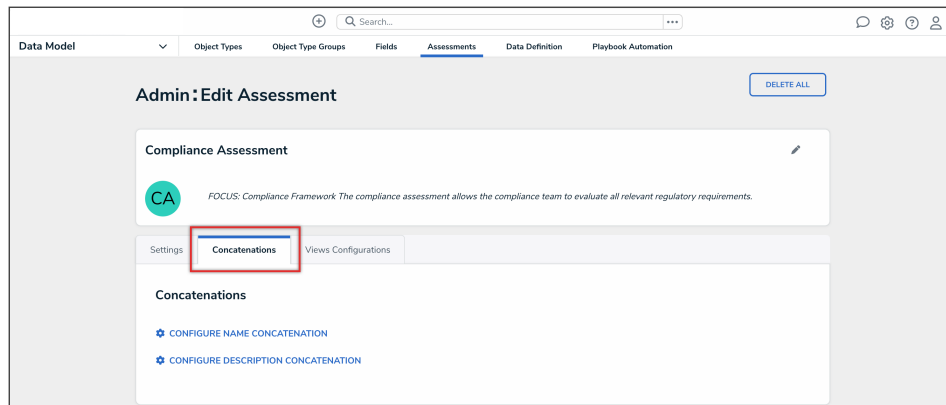
Assessments

Adding a Name or Description Concatenation to an Assessment

Before you can add a name or description concatenation to an assessment:

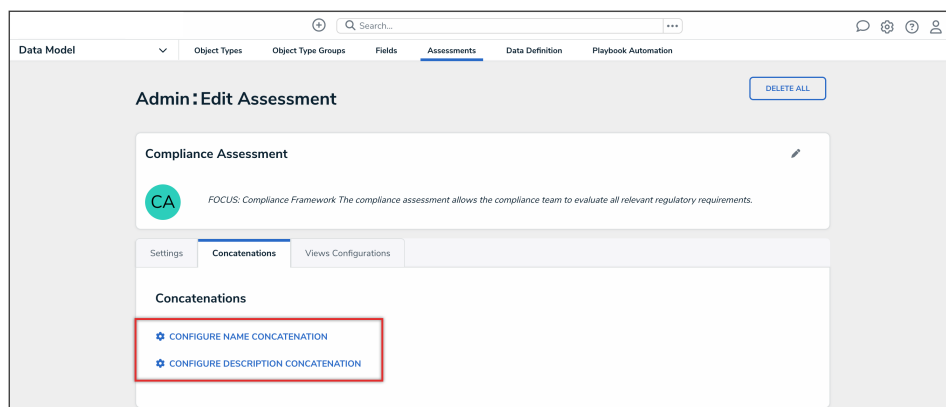
- Ensure that the required the [fields](#) and [Location](#) properties (if applicable) have been added to the object type and appropriate [configurable form](#).
- Ensure the data definition you wish to use to filter the data has been created from the [Data Definitions](#) settings.

1. From the **Admin: Edit Assessment** screen, click the **Concatenations** tab.



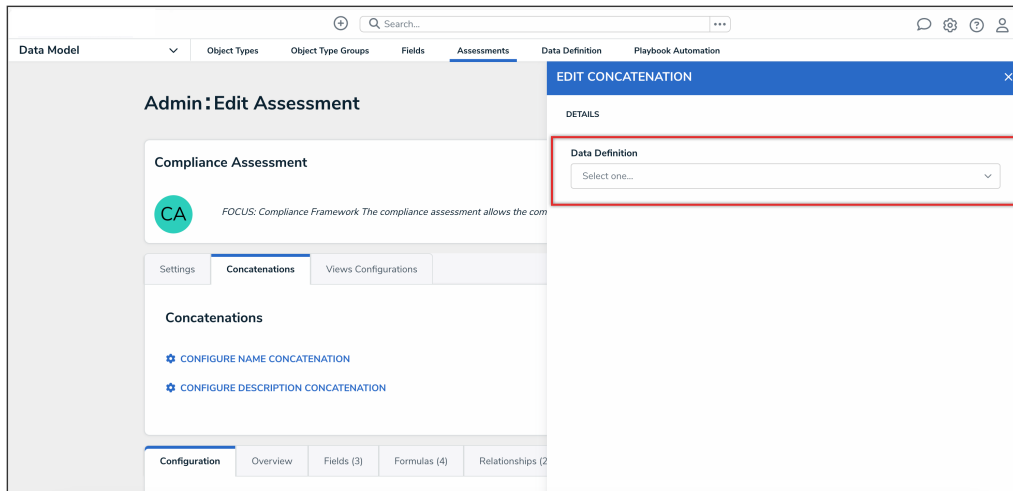
Concatenations Tab

2. From the **Concatenations** tab, click either the **Configure Name Concatenation** or **Configure Description Concatenation** link.



Configure Name Concatenation and Configure Description Concatenation Links

3. From the **Edit Concatenation** pop-up, select a data definition from the **Data Definition** dropdown menu. This will determine which object types, properties, and fields are available to add as variables.



Data Definition Dropdown

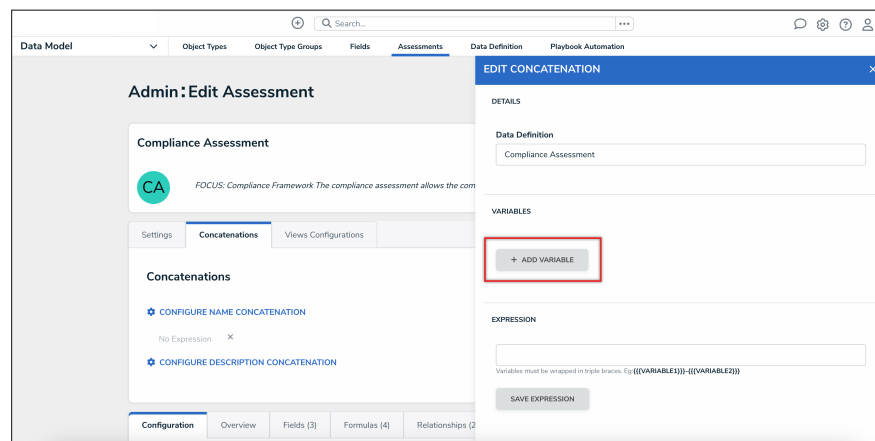


Note:

To select a different data definition for the concatenation, you must delete the concatenation on the **Edit Assessment** screen, then recreate it.

4. To define the variables for your concatenation:

- Click the **Add Variable** button.



Add Variable Button

- Select an object type in the data definition from the **Select Object Type** dropdown menu.

The screenshot shows the 'Admin: Edit Assessment' page for a 'Compliance Assessment'. On the right, the 'EDIT CONCATENATION' dialog is open. In the 'VARIABLES' section, the 'Select Object Type' dropdown menu is highlighted with a red rectangular box. Below it, the 'Available Component' dropdown is also visible but not highlighted.

Select Object Type Dropdown

- Select a property or field you want to auto-populate in an object's name or description from the **Available Component** dropdown menu.

This screenshot is similar to the previous one, showing the 'Admin: Edit Assessment' page. In the 'EDIT CONCATENATION' dialog, the 'Available Component' dropdown menu in the 'VARIABLES' section is now highlighted with a red rectangular box. The 'Select Object Type' dropdown above it now shows 'Compliance Assessment' as the selected option.

Available Component Dropdown

- If you selected the **Created On** property or **date** field, select a date format (e.g. YYYY-MM-DD) from the **Variable Format** dropdown menu. See the [Time Zone Conversions on Concatenations](#) article for more information on how this information is captured.
- If you selected the **Location** property, choose an address component from the **Select Address Component** dropdown menu (i.e., House Number, Street, City, State, ZIP Code, or Country).



Note:

A separate variable must be created for each address component.

- Enter a name for the variable in the **Variable Name** field.

The screenshot shows the 'Admin: Edit Assessment' page for a 'Compliance Assessment' object. On the right, the 'EDIT CONCATENATION' dialog is open. It has tabs for 'VARIABLES', 'Default Value', and 'Self'. The 'VARIABLES' tab is active, showing a 'Select Object Type' dropdown set to 'Compliance Assessment' and an 'Available Component' dropdown set to 'Property: Name'. The 'Variable Name' text input field is highlighted with a red rectangle. Below it is a 'Default Value' text input field and a 'Self' checkbox. 'ADD' and 'CANCEL' buttons are at the bottom.

Variable Name Field

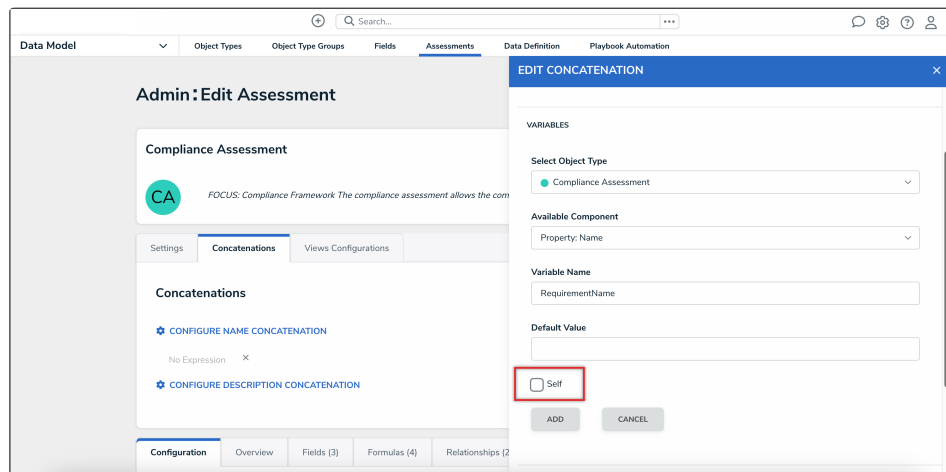
Note: Spaces and special characters in variable names are not permitted. For example, naming a variable **RiskName** in the **Variable Name** field is valid, but entering **Risk Name** in this field will result in an error.

- (Optional):** To display a default word or phrase in the concatenation when the variable has no data, enter that word or phrase in the **Default Value** field (e.g., "Null" or "None provided").

This screenshot is similar to the previous one, showing the 'EDIT CONCATENATION' dialog. In this instance, the 'Default Value' text input field is highlighted with a red rectangle. The 'Variable Name' field now contains the text 'RequirementName'. The 'Self' checkbox is still unchecked.

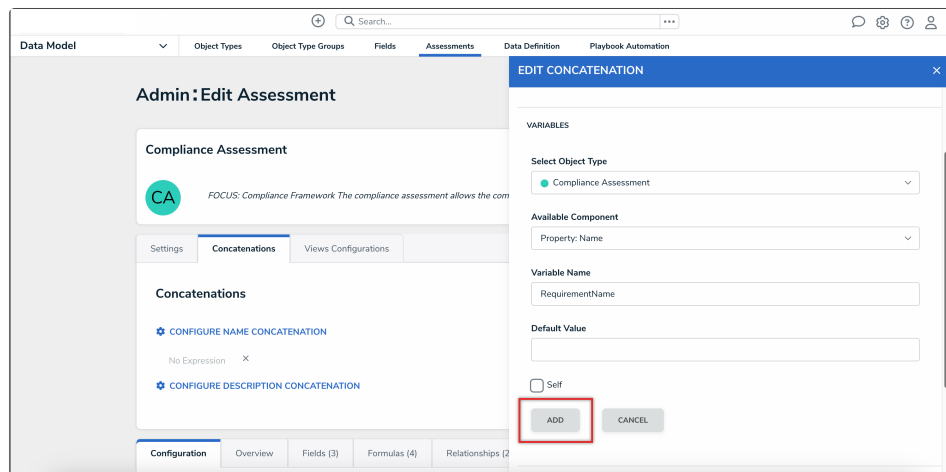
Default Value Field

- (Optional):** If the variable has been created from a component on the same object type where the concatenation is saved, select the **Self** checkbox.



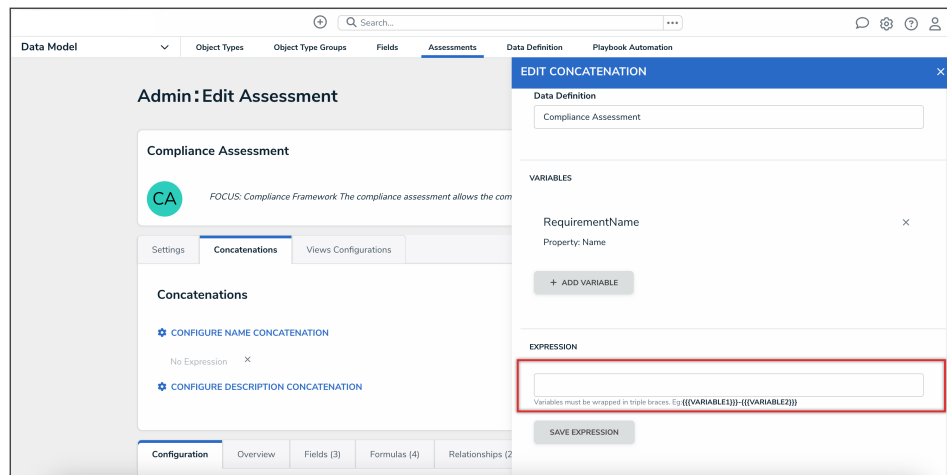
Self Checkbox

- Click the **Add** button to save the variable.



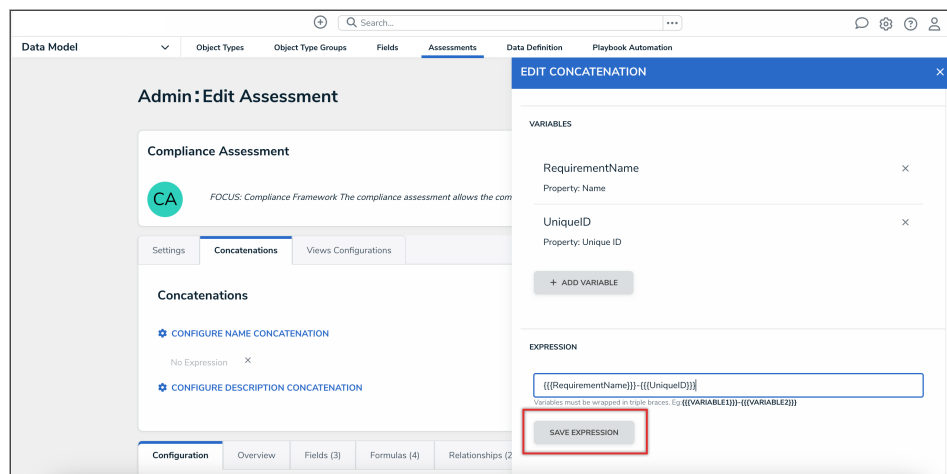
Add Button

- Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly brackets (e.g. `{{{CreatedBy}}}`) with no spaces or special characters within the brackets). If needed, you can include spaces and other alphanumeric characters between the variables.



Expression Field

- Click the **Save Expression** button.



Save Expression Button