

Add Name or Description Concatenations to an Assessment

Last Modified on 09/17/2025 2:19 pm EDT

Overview

A concatenation uses data from properties and fields to populate the name and description properties of objects.

User Requirements

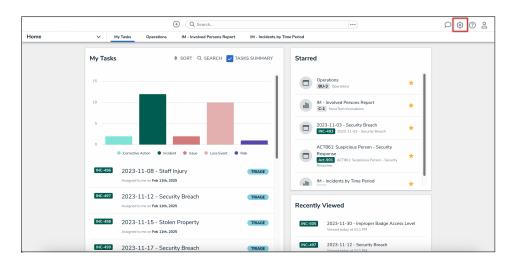
The user must have Administrator permissions in order to access the **Admin Overview** section.

Related Information/Setup

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

Navigation

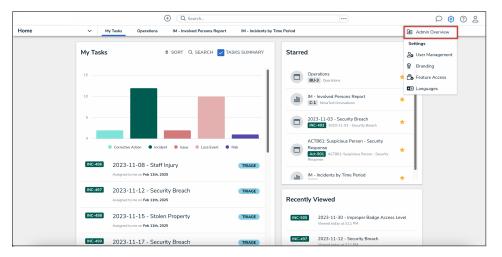
1. From the *Home* screen, click the **Administration** icon.



Administration Icon

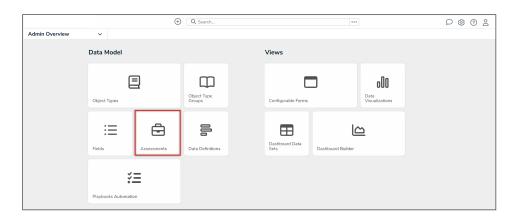
2. From the **Administrator Settings** menu, click the **Admin Overview** link.





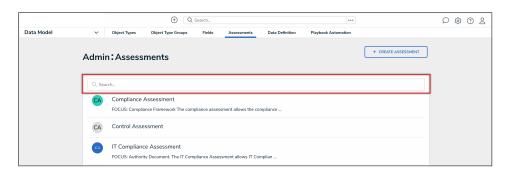
Administrator Settings Menu

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



Assessments Tile

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



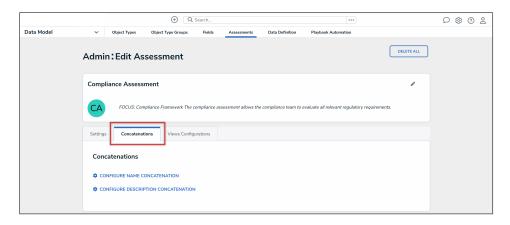
Assessments

Adding a Name or Description Concatenation to an Assesment



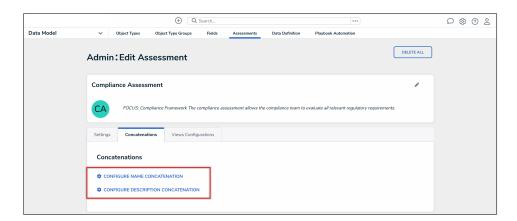
Before you can add a name or description concatenation to an assessment:

- 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

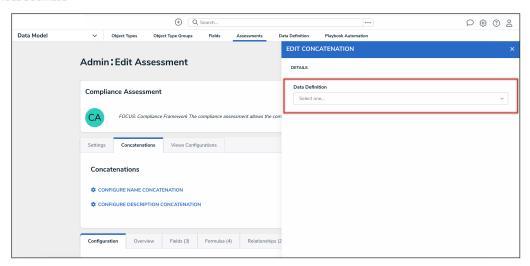
2. From the Concatenations tab, click either the Configure Name Concatenation or Configure Description Concatenation link.



Configure Name Concatenation and Configure Description Concatenation Links

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.





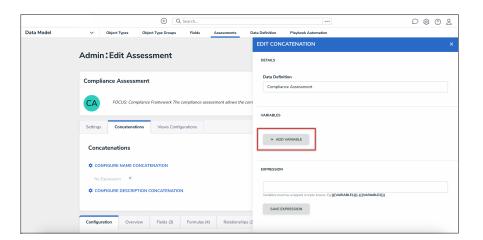
Data Definition Dropdown



Note:

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

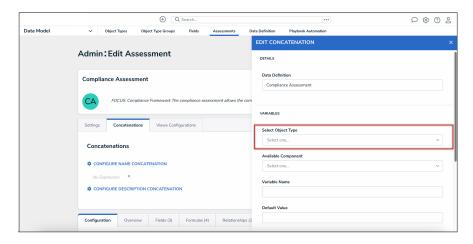
- 4. To define the variables for your concatenation:
 - Click the Add Variable button.



Add Variable Button

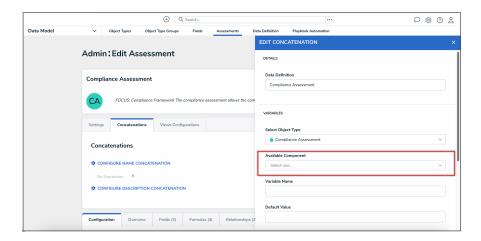
• Select an object type in the data definition from the **Select Object Type** dropdown menu.





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.



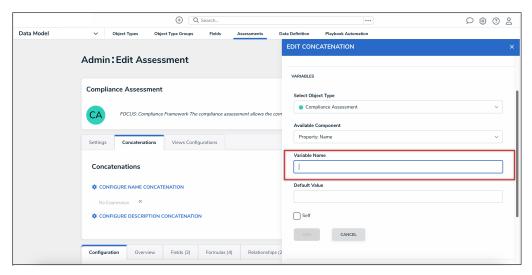
Available Component Dropdown

- 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).



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

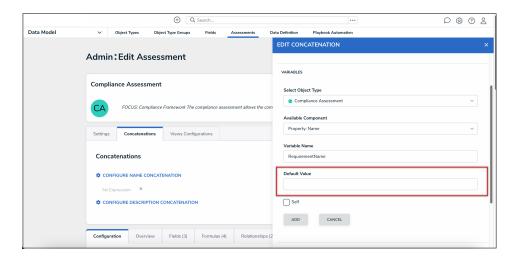




Variable Name Field

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.

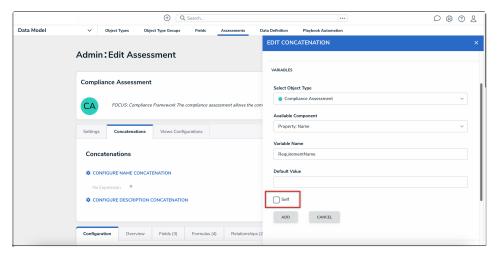
5. (Optional): To display a default word or phrase in the concatenation when the variable has no data, enter that word or phrase in the Default Value field (e.g., "Null" or "None provided").



Default Value Field

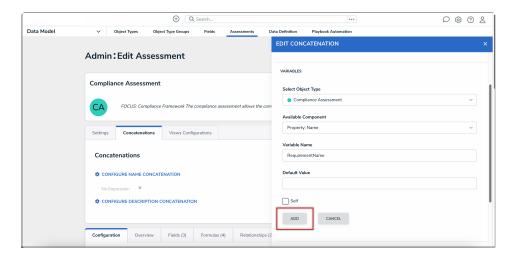
6. **(Optional):** If the variable has been created from a component on the same object type where the concatenation is saved, select the **Self** checkbox.





Self Checkbox

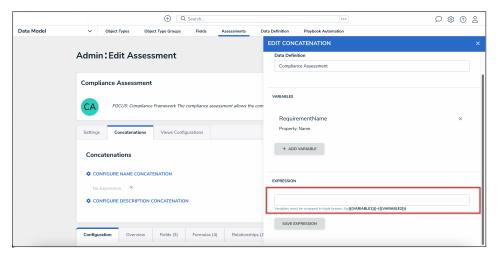
7. Click the **Add** button to save the variable.



Add Button

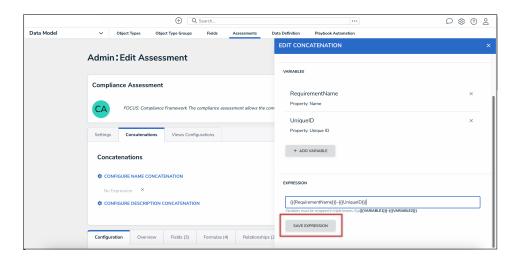
8. Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly brackets (e.g. {{CreatedBy}}}) with no spaces or special characters within the brackets). If needed, you can include spaces and other alphanumeric characters between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





Expression Field

9. Click the Save Expression button.



Save Expression Button