Creating a New Object Type

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Overview

Object types are the containers for the data entered into Resolver and are the foundation of the entire system.

User Account Requirements

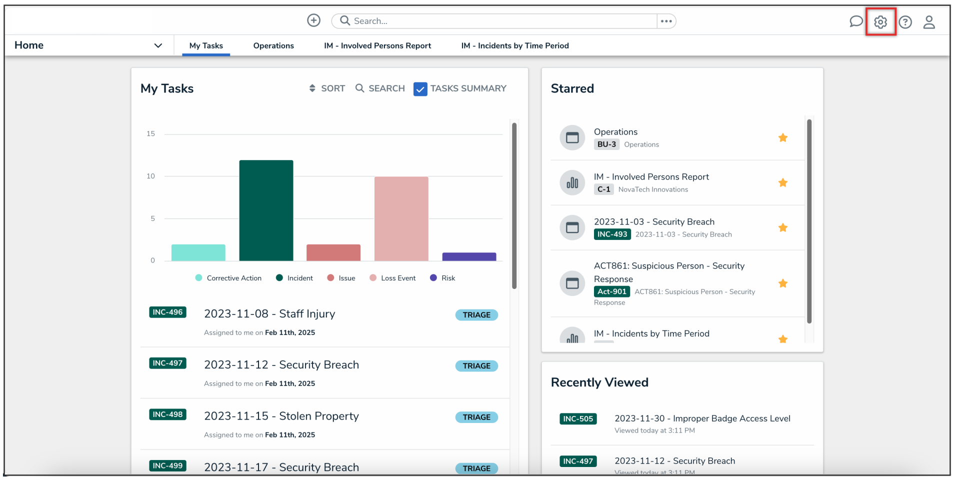
The user must have Administrator permissions in order to create an object type.

Related Information/Setup

Please refer to the Object Types Overview article for further information on using object types in Resolver.

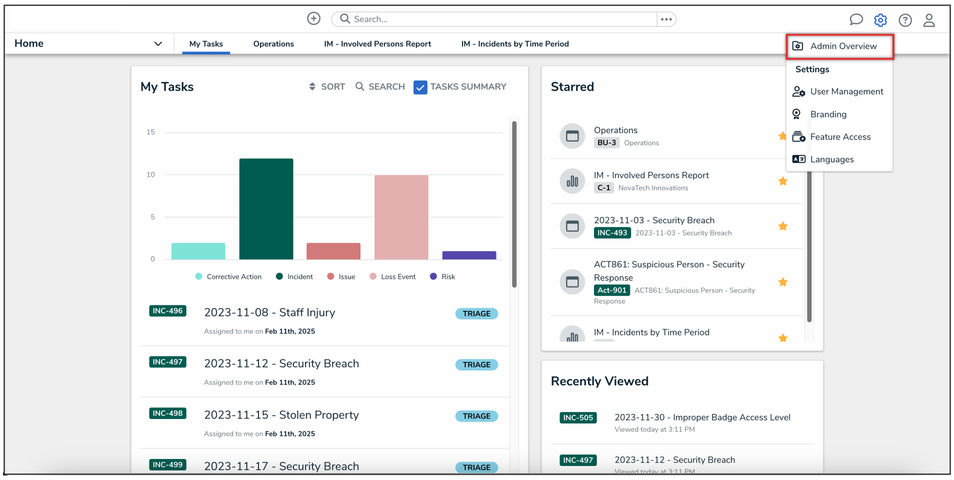
Navigation

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



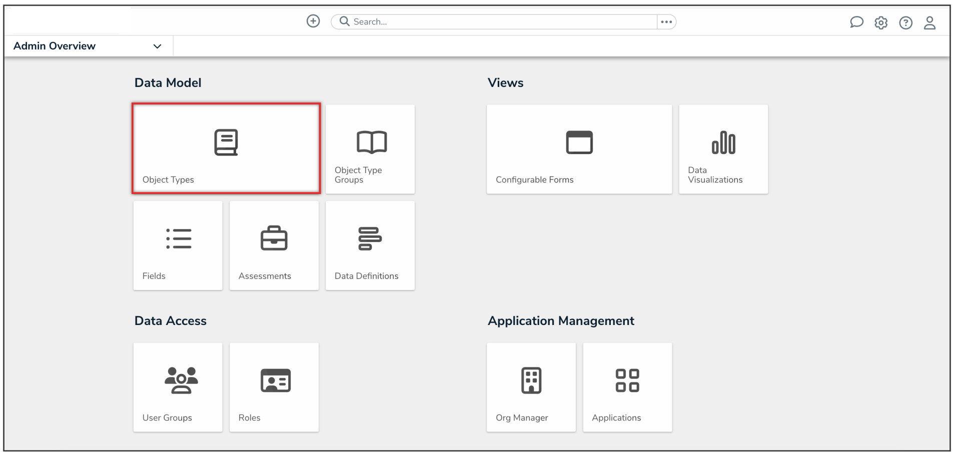
Administration Icon

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



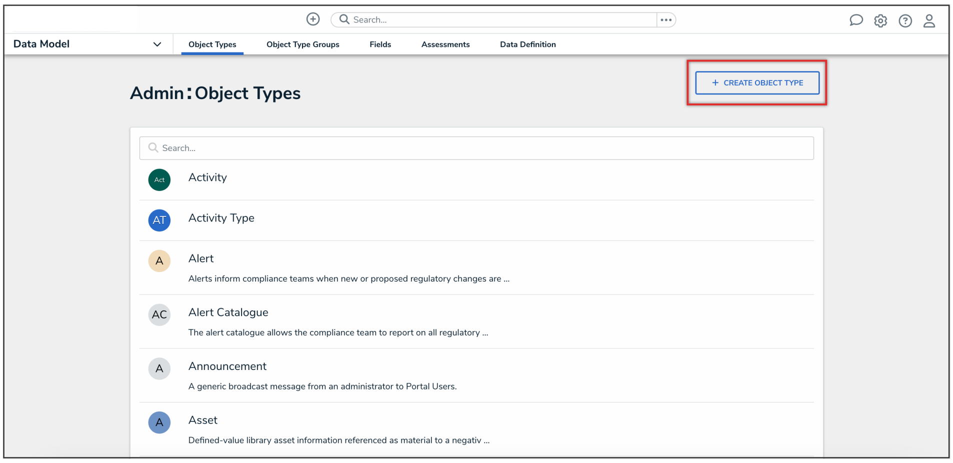
Admin Overview Link

3. From the ***Admin Overview*** screen, click the **Object Types** tile under the **Data Model** section.



Object Types Tile

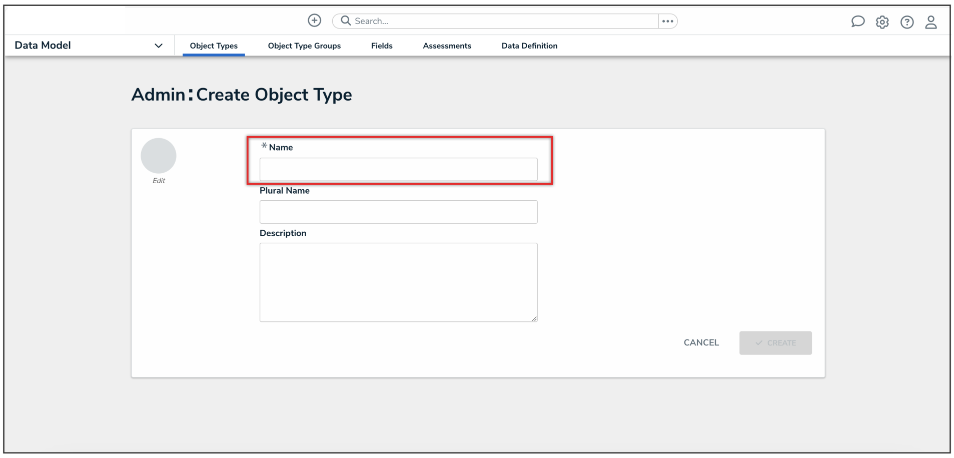
4. From the ***Admin: Object Types*** screen, click the **Create Object Type** button.



Create Object Type Button

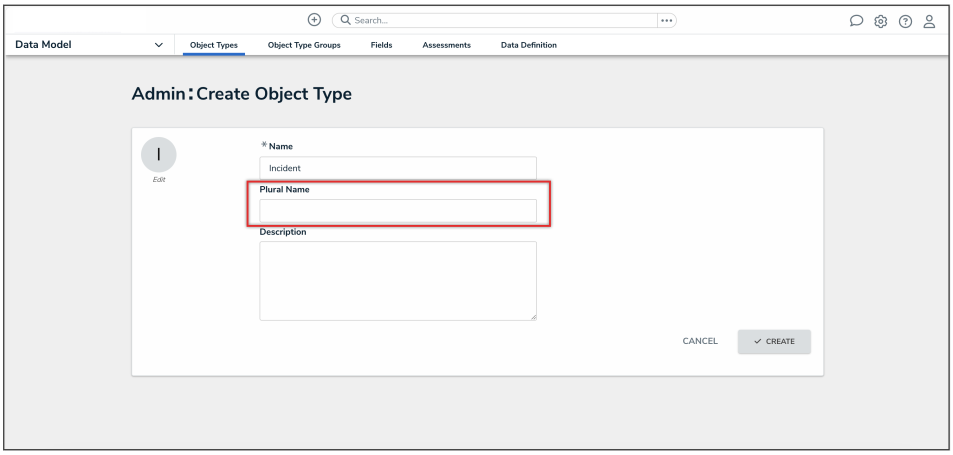
Creating a New Object Type

1. Enter a name for the object type in the **Name** field.



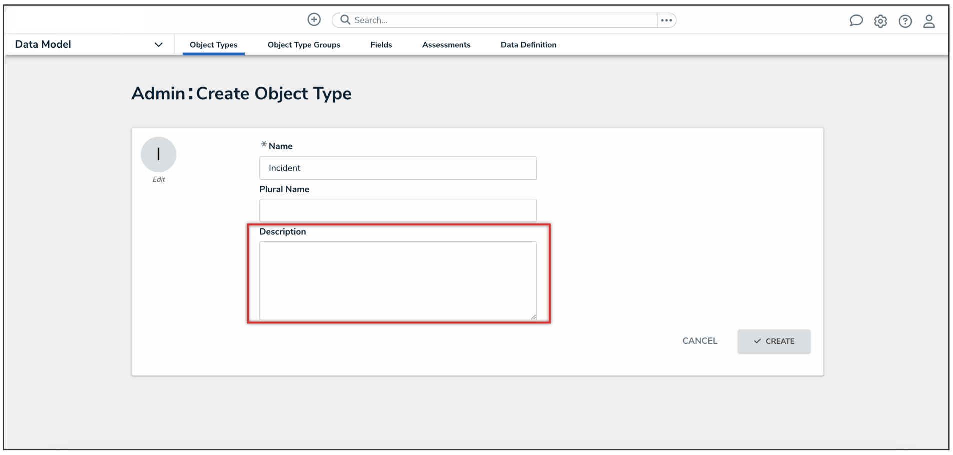
Name Field

2. **(Optional):** In the **Plural Name** field, enter a plural name for the object type, which will appear when viewing a list of the objects for that type (e.g. “View Incident**s**” instead of “View Incident”).



Plural Name Field

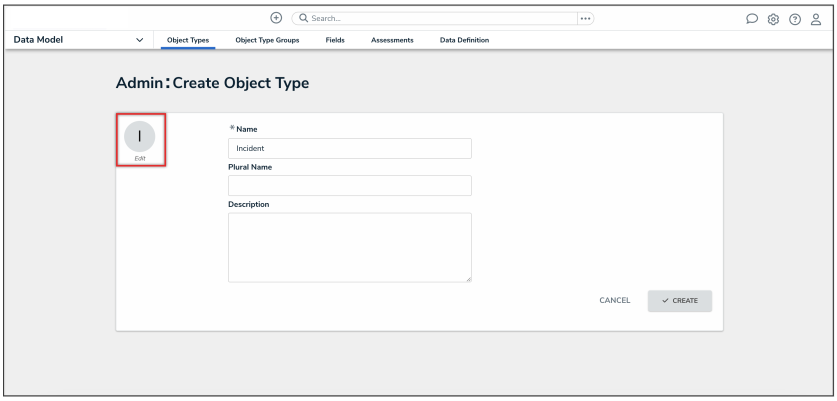
3. **(Optional):** In the **Description** field, enter a description of the object type, which will appear on the ***Edit Object Type*** screen when editing the object type.



Description Field

4. **(Optional):** To customize the object type monogram:

    a. Click the monogram icon to the left of the **Name** field.

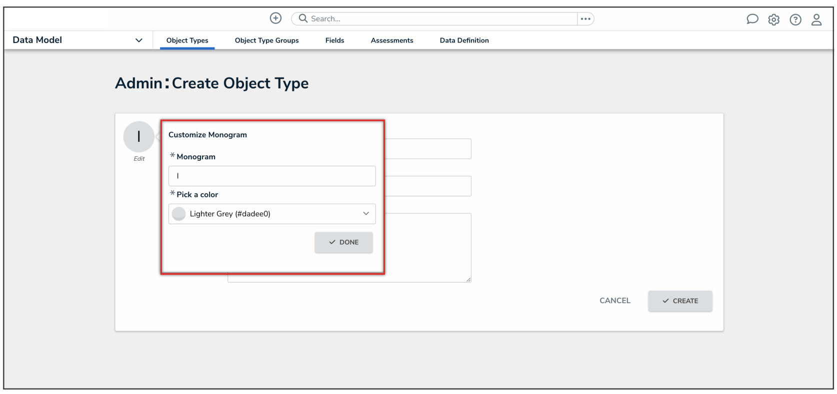


Monogram

    b. In the ***Customize Monogram*** pop-up, enter 1 to 3 characters in the **Monogram** field.

    c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.

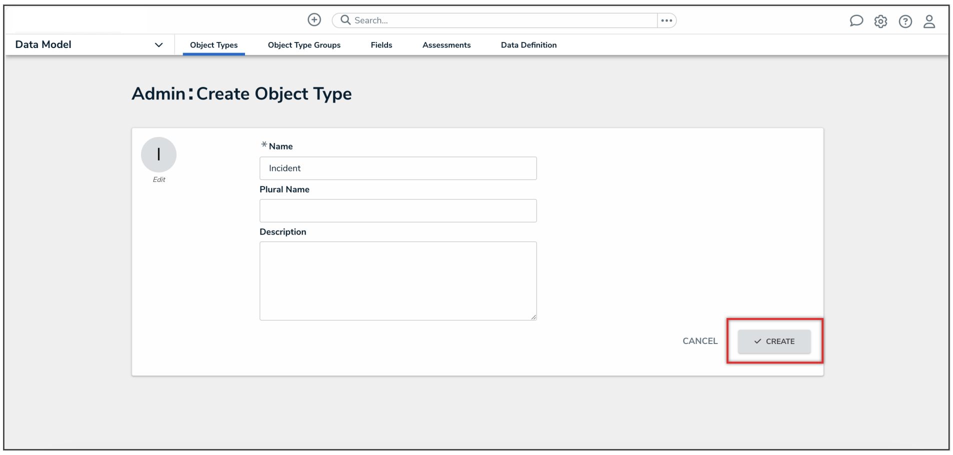
    d. Click the **Done** button.



Customize Monogram Pop-Up

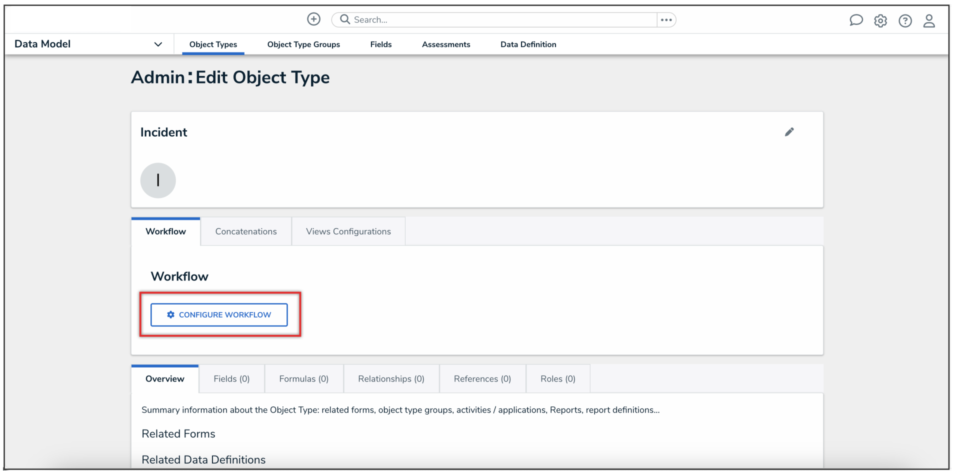
> ***Note:***
> *The monogram is used to help you quickly identify an object type throughout the system. If you're creating multiple similar object types (e.g. Incidents and Incident Review) you may want to apply the same or similar colors to their monograms to help create a theme.*

5. Click the **Create** button to display ***Admin: Edit Object Type*** screen.



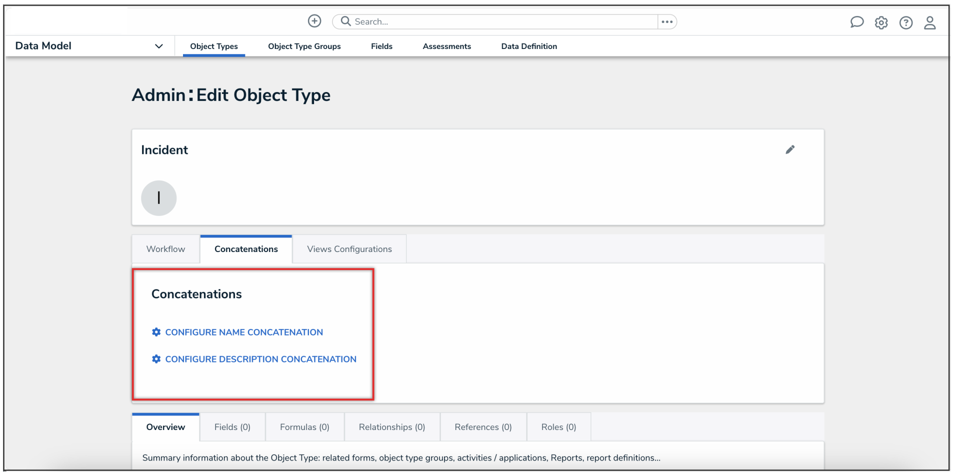
Create Button

6. From the **Workflow** tab, click the **Configure Workflow** button to edit the object type's workflow. Please see the Edit or Delete a State article for further instruction.



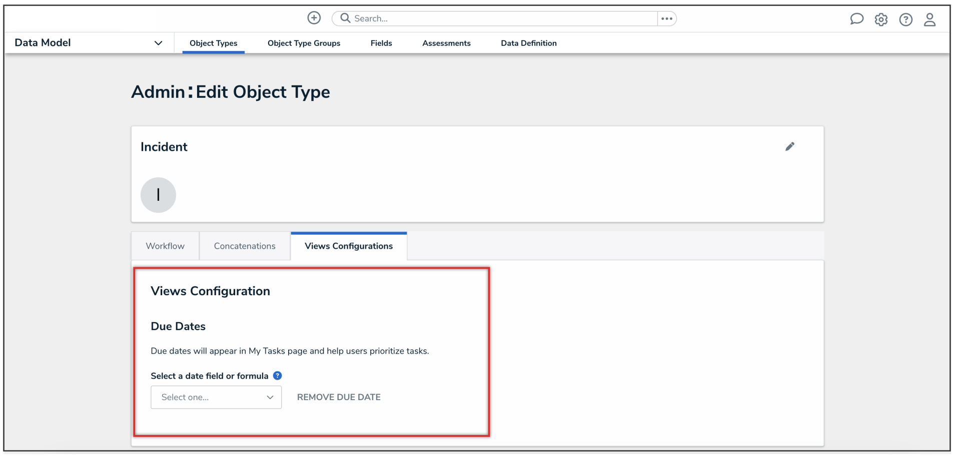
Configure Workflow Button

7. From the **Concatenations** tab, click the **Configure Name Concatenation** or **Configure Description Concatenation** links to add a name or description concatenation. Please refer to the Add Concatenation to an Object Type article for further instruction.



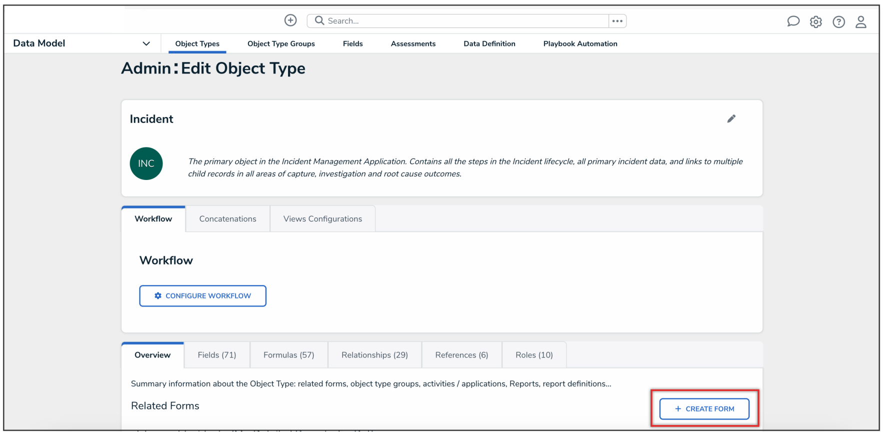
Concatenation Tab

8. From the **Views Configuration** tab, you can add a due date to the object type so that that users can view and prioritize upcoming and overdue tasks in the **My Tasks** card. See the Adding a Due Date to an Object Type article for further instruction.



Views Configuration Tab

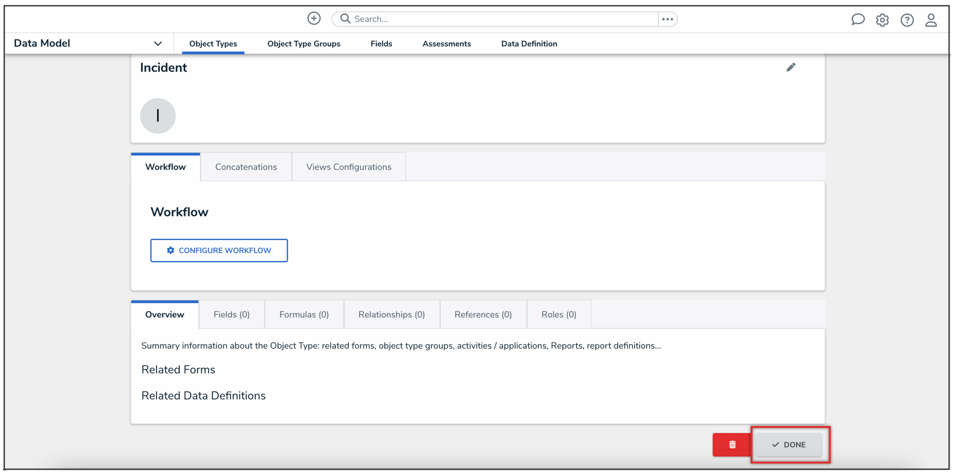
9. Click the tabs to edit, add, or delete the components added to the object type.
   - **Overview Tab:** The **Overview** tab summarizes the related forms, object type groups, activities, applications, reports, and report definition connected to the object type.
     To create a form from the **Overview** tab, click the **Create Form** button, and follow the instructions to create a standard form or a navigation form.



Create Form Button

- **Fields Tab:** The **Fields** tab displays the fields that are connected to the object type. The **Fields** tab allows you to add fields to or unlink fields from the object type. Please refer to the Add Fields to an Object Type article for further instruction.
- **Formulas Tab:** The **Formulas** tab displays the formulas connected to the object type. The **Formulas** tab allows you to add fields to or delete formulas from the object type. Please refer to the Create Formulas on an Object Type article for further instruction.
- **Relationships Tab:** The **Relationships** tab displays the relationships connected to the object type. The **Relationships** tab allows you to add relationships to or delete relationships from the object type. Please refer to the Create Relationships on an Object Type article for further instruction.
- **References Tab:** The **References** tab displays the object type's references which indicates that an object is connected to another object through a relationship.
- **Roles Tab:** The **Roles** tab displays the roles connected to the object type. The **Roles** tab allows you to add fields to or delete formulas from the object type. Please refer to the Add Roles to an Object Type article for further instruction.

10. Click the **Done** button.



Done Button