

Add Name or Description Concatenations to an Object Type

Last Modified on 08/12/2024 2:58 pm EDT

Overview

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

User Requirements

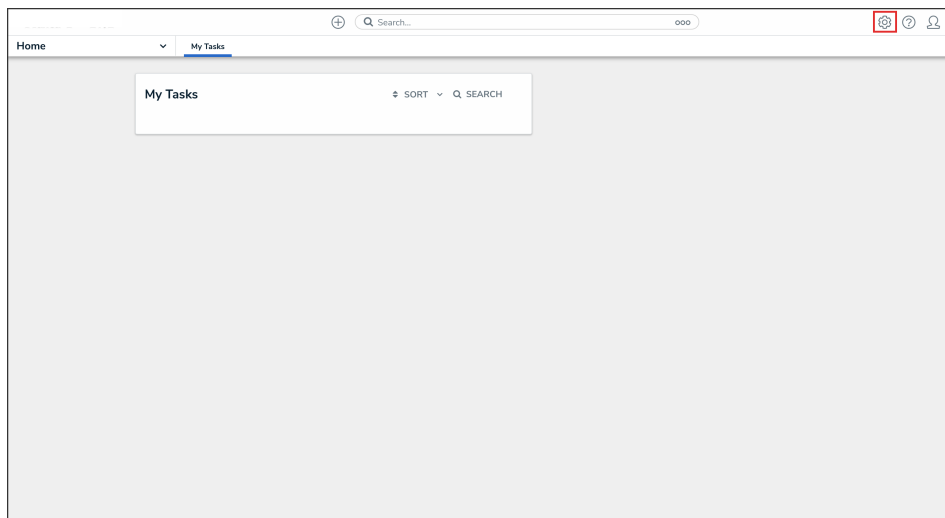
The user must have Administrator permissions in order to access the ***Admin Overview*** section.

Related Information/Setup

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

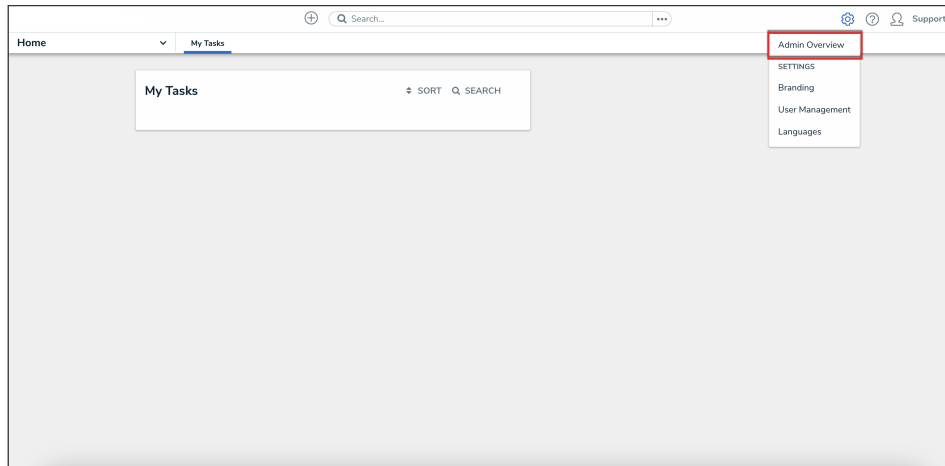
Navigation

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



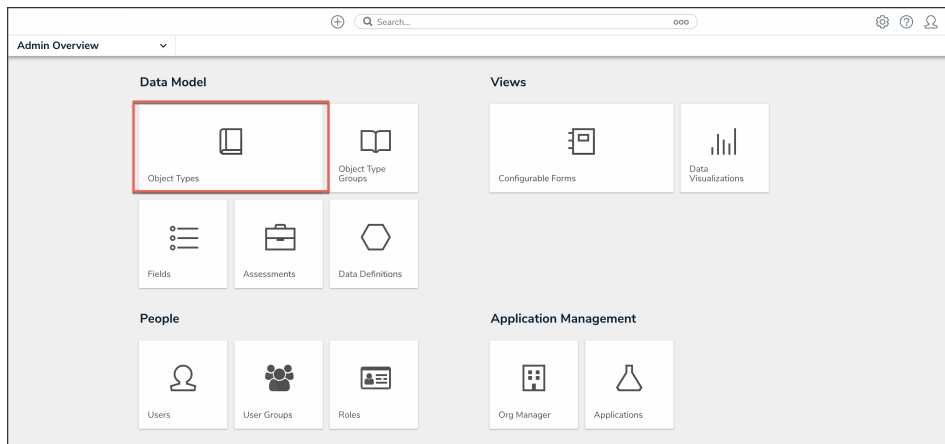
Administration Icon

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



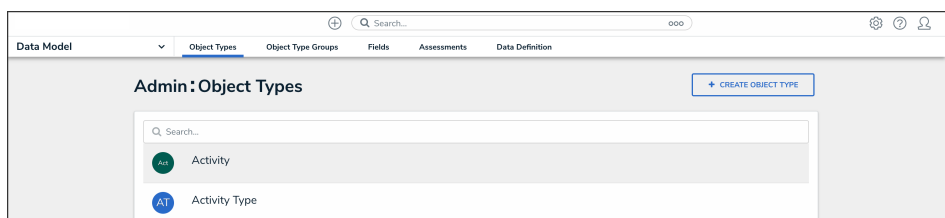
Administrator Settings Menu

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



Object Types Tile

- From the list of object types, click the object type that you want to add a name or description concatenation to.



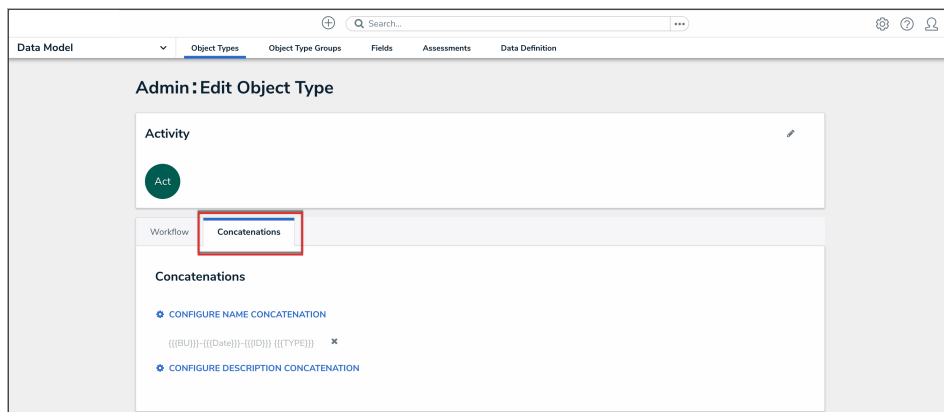
Object Type Name

Adding a Name or Description Concatenation to an Object Type

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

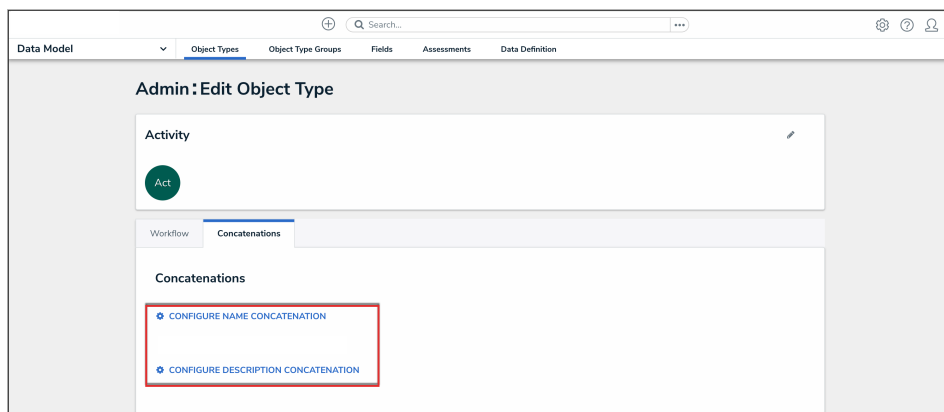
- Ensure that the required the [fields](#) and [Location](#) properties (if applicable) have been added to the object type and appropriate [configurable form](#).
- If the concatenation will be pulling data from other object type(s), ensure the appropriate [relationships](#) and [references](#) have been added to those object types, along with the relevant fields.
- 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 Object Type** screen, click the **Concatenations** tab.



Concatenations Tab

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



Configure Name Concatenation and Configure Description Concatenation Buttons

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.

EDIT CONCATENATION

DETAILS

Data Definition

Activity

VARIABLES

+ ADD VARIABLE

EXPRESSION

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

Data Definition Dropdown



Note:

If you want to select another data definition, you must delete the concatenation by clicking the **X** icon beside the concatenation on the **Edit Object Type** page, then recreate it.

4. To define the variables for your concatenation:

- Click the **Add Variable** button.

EDIT CONCATENATION [X]

DETAILS

Data Definition [Eye Icon]

Activity (Activity Type; Business Unit)

VARIABLES

TYPE Field: Activity Type Abbreviation	[X]
BU Field: Abbreviation	[X]
Date Property: Created On	[X]
ID Property: Unique ID	[X]

+ ADD VARIABLE

Add Variable Button

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

EDIT CONCATENATION [X]

VARIABLES

Select Object Type [Dropdown Menu]

Available Component [Dropdown Menu]

Variable Name [Text Field]

Default Value [Text Field]

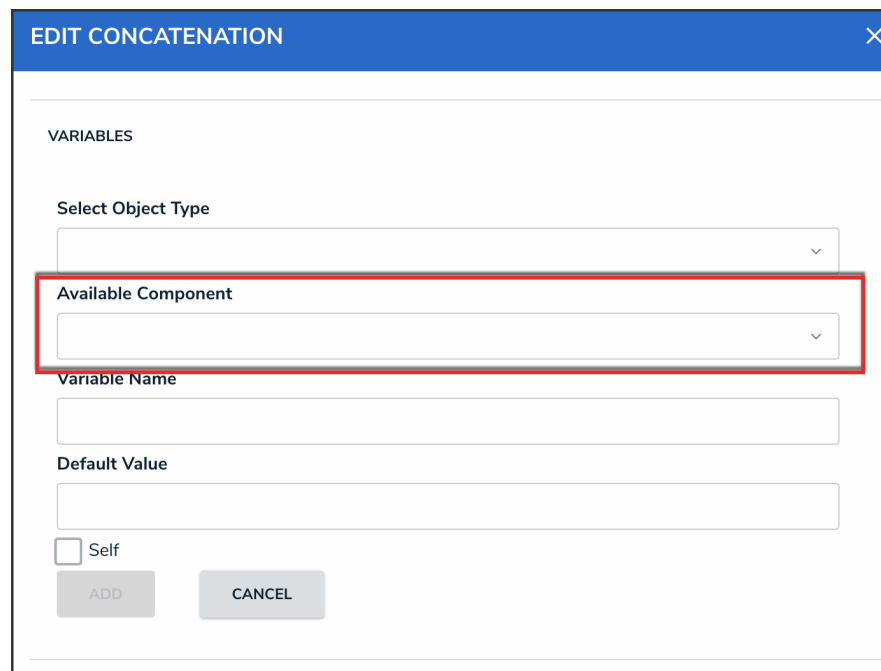
☐ Self

ADD **CANCEL**

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.



The screenshot shows a dialog box titled "EDIT CONCATENATION" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "VARIABLES". Below this label, there are four input fields: "Select Object Type", "Available Component", "Variable Name", and "Default Value". The "Available Component" field is highlighted with a red rectangular border. Below these fields, there is a checkbox labeled "Self". At the bottom of the dialog, there are two buttons: "ADD" and "CANCEL".

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.

EDIT CONCATENATION

VARIABLES

Select Object Type

Available Component

Variable Name

Default Value

☐ Self

ADD

CANCEL

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").

EDIT CONCATENATION

VARIABLES

Select Object Type

Available Component

Variable Name

Default Value

☐ Self

ADD

CANCEL

Default Value Field

- If the variable has been created from a component on the same object type where the concatenation is saved (e.g., the Incident Name property is being saved to an expression on the Incident object type) select the **Self** checkbox.

EDIT CONCATENATION

DETAILS

Data Definition

Activity

VARIABLES

Select Object Type

Activity

Available Component

Property: Name

Variable Name

Name

Default Value

☒ Self

ADD

CANCEL

Self Checkbox

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

EDIT CONCATENATION

DETAILS

Data Definition

Activity

VARIABLES

Select Object Type

Activity

Available Component

Property: Name

Variable Name

Name

Default Value

☒ Self

ADD

CANCEL

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.

EDIT CONCATENATION

DETAILS

Data Definition

Activity

VARIABLES

+ ADD VARIABLE

EXPRESSION

Variables must be wrapped in triple braces. Eg:{{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

Expression Field

- Click the **Save Expression** button.

EDIT CONCATENATION

DETAILS

Data Definition

Activity

VARIABLES

+ ADD VARIABLE

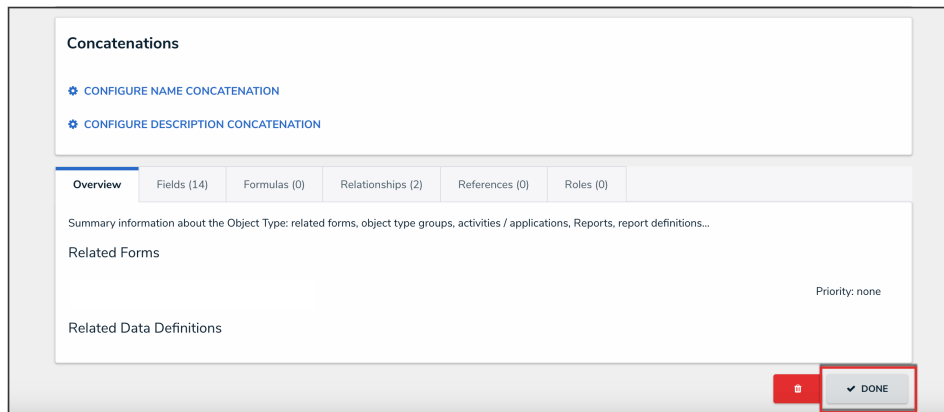
EXPRESSION

Variables must be wrapped in triple braces. Eg:{{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

Save Expression Button

10. From the **Admin: Edit Object Type** screen, click the **Done** button.



Done Button