

Creating a New Select List

Last Modified on 06/13/2024 11:14 am EDT

Overview

A **Select List** is a field type that allows users to select one or more options. You can create a Single Select List (select one option from the Field) or a Multi-Select List (select multiple options from the Field). Currently, the system only allows 1000 options per Select List.

Single Select Lists with **five options or fewer** can also be configured to display [trending data](#) when added to a standard form on an object type.

By default, Single and Multi-Select Lists appear on forms as dropdown menus. Admins can configure Single Select lists to appear as a group of buttons, provided the list has five options or fewer. To enable this option, see [step 11](#) below.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to create a Select List.

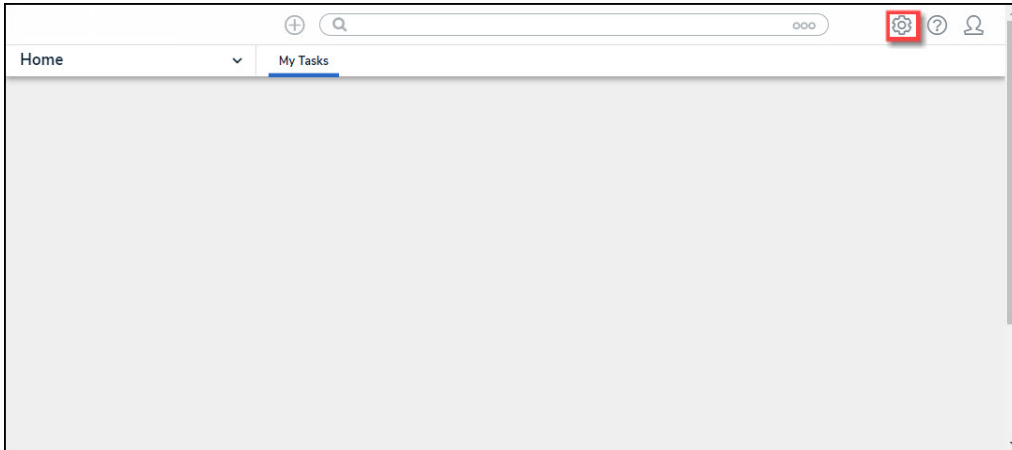
Related Information/Setup

For more information on adding elements to configurable forms, see the [Add Elements to a Standard Form](#), [Fields on Forms](#), and [Formulas](#) articles.

- [Add Elements to a Standard Form](#)
- [Fields on Forms](#)
- [Formulas](#)

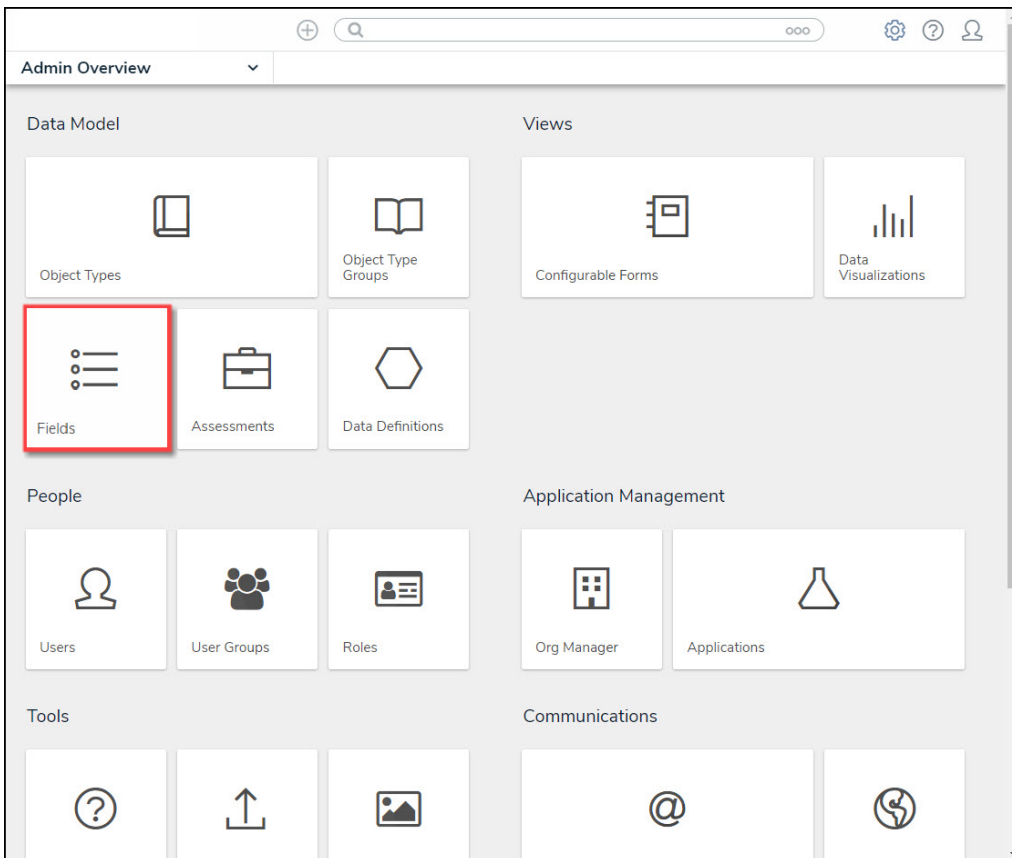
Navigation

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



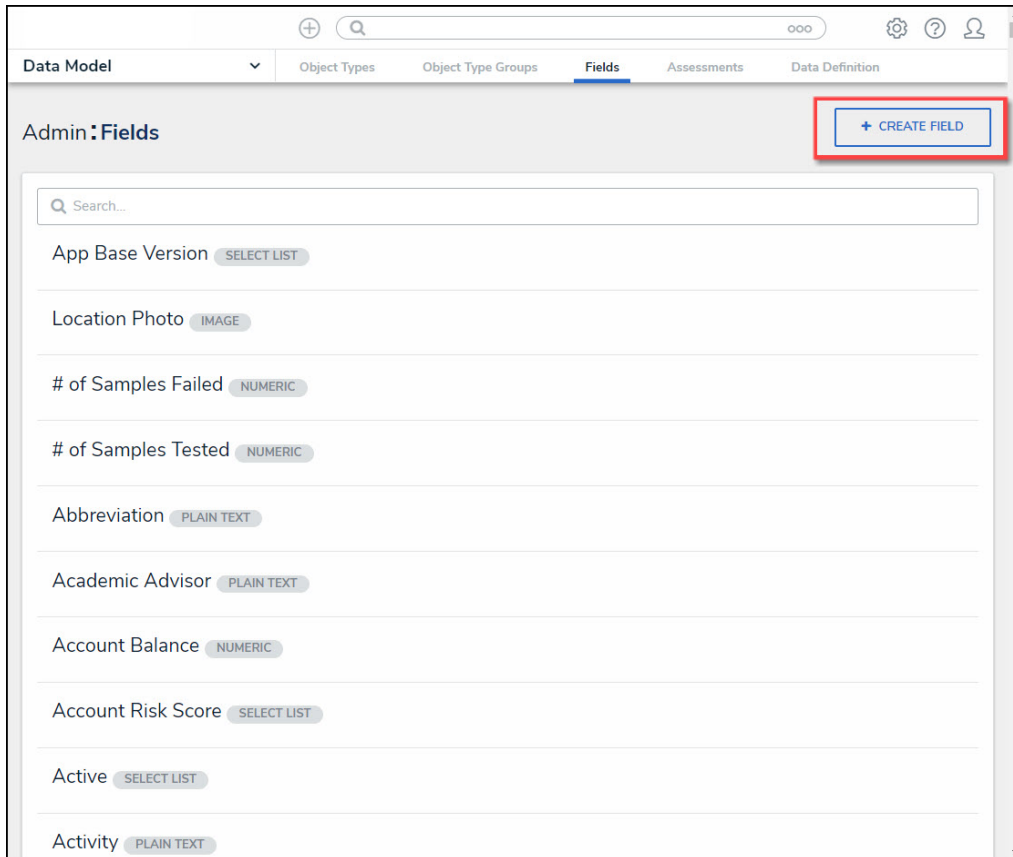
Administration Icon

2. From the **Admin Overview** screen, click the **Fields** tile on the **Data Model** section.



Fields Tile

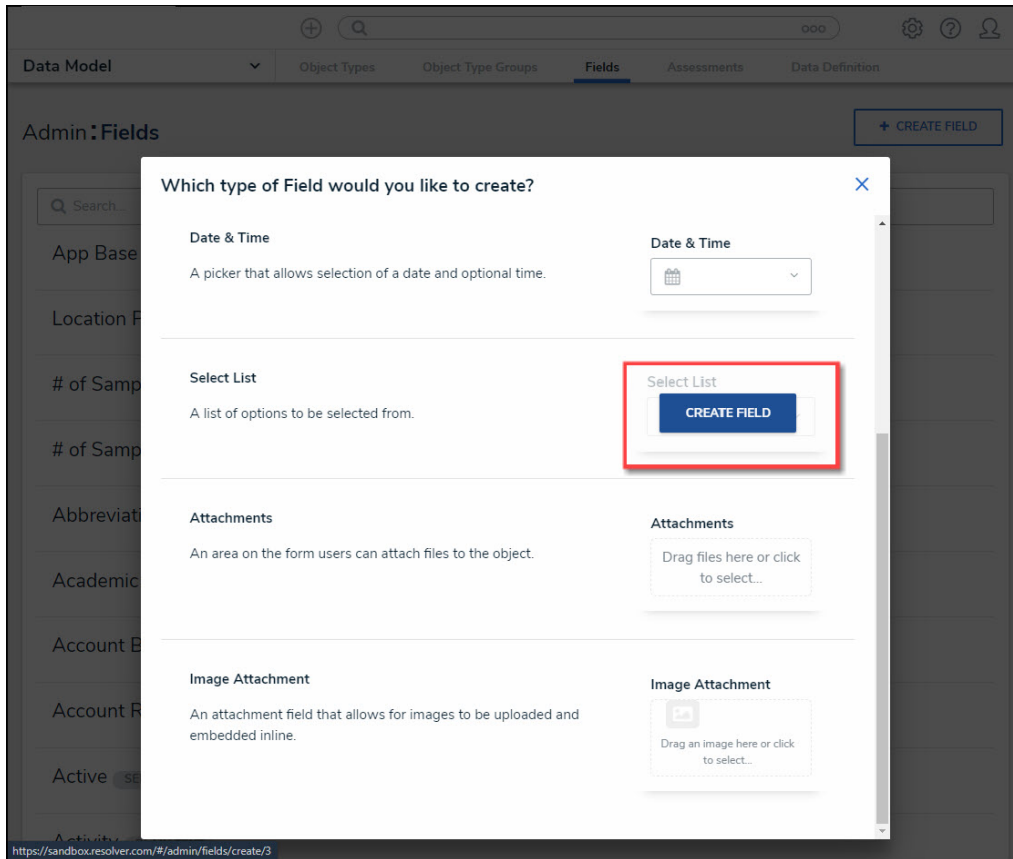
3. From the **Admin: Fields** screen, click on the + **Create Field** button.



+ Create Field Button

Create a New Select List Field

1. From the ***Which type of Field would you like to create?*** screen, scroll to the **Select List** section.
2. Hover your mouse over the **Select List** field and click the **Create Field** button.



Select List Field - Create Field

3. From the **Admin: Create a Field** screen, and enter a Field Name in the **Field Name** field. The Field Name represents the Field in the system and will appear on Object Types within the system.

The screenshot shows the 'Admin: Create a Field' interface. At the top, there is a navigation bar with 'Data Model' selected and other tabs like 'Object Types', 'Object Type Groups', 'Fields', 'Assessments', and 'Data Definition'. Below the navigation, the form is titled 'Admin: Create a Field'. It contains several input fields: 'Field Type' (a dropdown menu with 'Select List' visible), 'Field Name' (a text input field with a red border and a '*' icon, containing the placeholder text 'e.g., Asset Name, Risk Type, etc.'), 'Long Name' (a larger text area), 'Selection Type' (a dropdown menu with 'Single' selected), and 'Input Type' (a dropdown menu with 'Search Input' selected). Below these is a section for 'Current Options (0)' with an 'Add Options' button and a message 'No Options have been added'. At the bottom, there is a 'PREVIEW' section and two buttons: 'CANCEL' and 'CREATE'.

Field Name Field

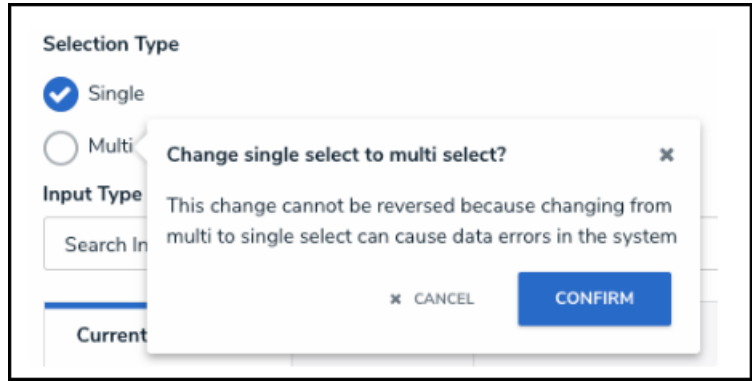
4. **(Optional)** Enter additional Field information or instructions in the **Long Name** text field. Long Names can be displayed on configurable forms.

The screenshot shows the 'Admin: Create a Field' interface. At the top, there are navigation tabs: 'Data Model', 'Object Types', 'Object Type Groups', 'Fields' (selected), 'Assessments', and 'Data Definition'. Below the tabs, the title 'Admin: Create a Field' is displayed. The form contains several sections: 'Field Type' with a dropdown menu showing 'Select List'; 'Field Name' with a text input field containing 'e.g., Asset Name, Risk Type, etc.' and an asterisk; 'Long Name' with a large text input field highlighted by a red border; 'Selection Type' with a dropdown menu showing 'Single'; and 'Input Type' with a dropdown menu showing 'Search Input'. Below these sections is a 'Current Options (0)' section with an 'Add Options' button and a message 'No Options have been added'. At the bottom, there is a 'PREVIEW' section and two buttons: 'CANCEL' and 'CREATE'.

Long Name Text Field

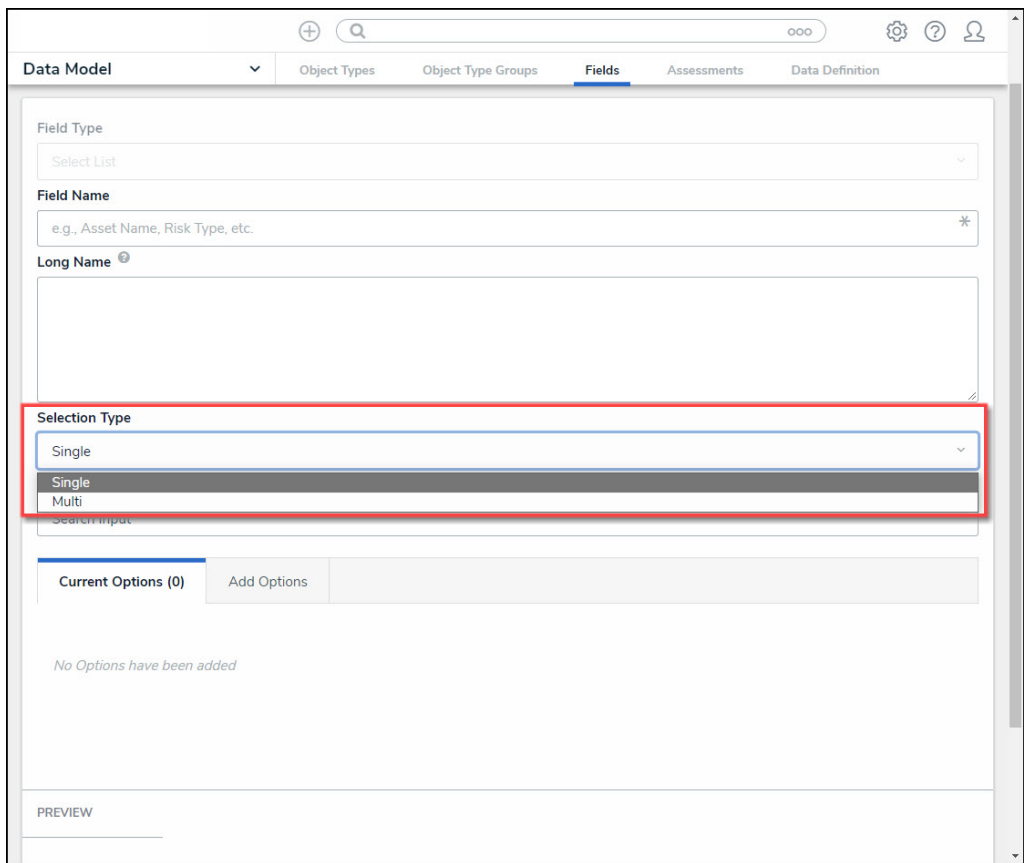
5. Select a field type from the **Selection Type** drop-down:

- **Single:** A **Single Select List** allows users to select only one option from the field. Only Single Select Lists are used as variables in formulas and conditions, as report filters, and as visual charts in reports.
 - When a **Field** is saved as a **Single Select List**, and it is changed from a single-select list to a multi-select list a **Confirmation** screen will appear, indicating that **This Change cannot be reversed because changing from multi to single select can cause data errors in the system**. Administrators must confirm the change by clicking the **Confirm** button on the **Confirmation** pop-up.



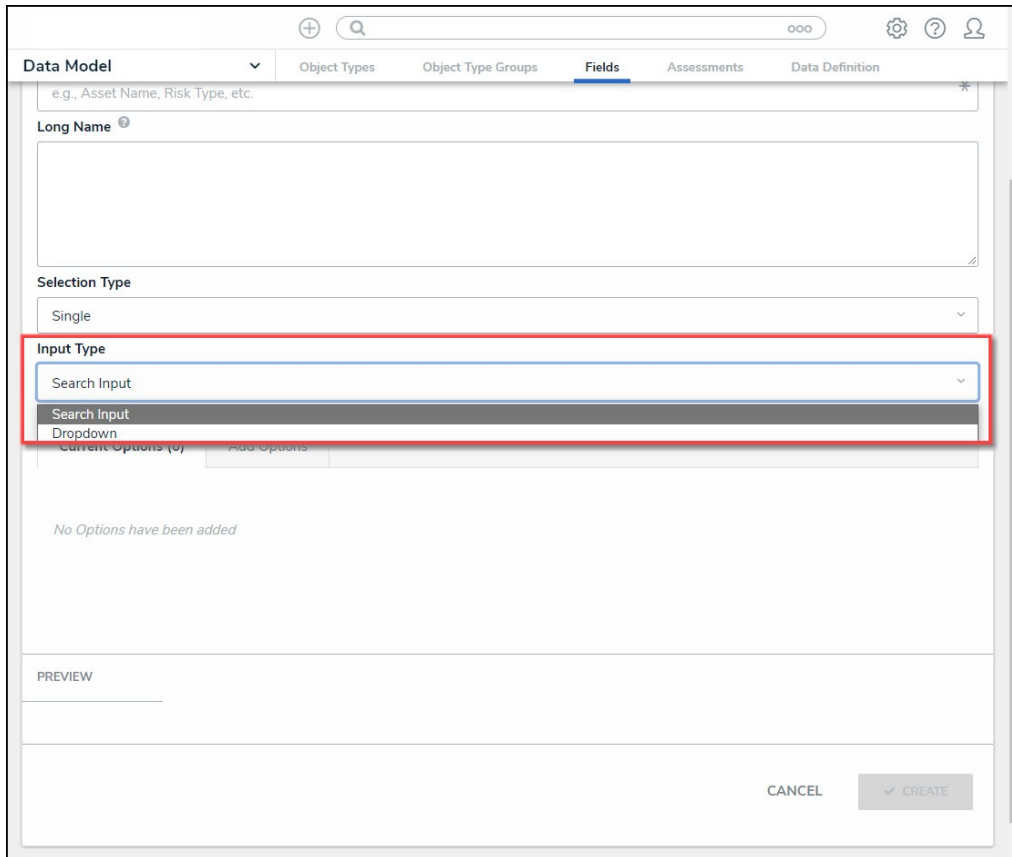
Confirmation Pop-up

- **Multi:** A **Multi-Select List** allows users to select more than one option from the field.
 - When a **Field** is saved as a **Multi-Select List**, the **Selection Type** field is locked, preventing a user from changing to a **Single Select List**. Changing from **Multi** to **Single** can potentially cause data errors in the system, as a **Single Select List** field only allows one option.



Selection Type Drop-down

6. Select an input type from the **Input Type** drop-down. When creating a **Multi-Select List**, the **Input Type** drop-down will not appear, and the **Input Type** will automatically default to Dropdown menu.



Input Type Drop-down

- **Search Input:** A **Search Input Type** allows users to use a search field to locate and select field options.



Search Input Type Field

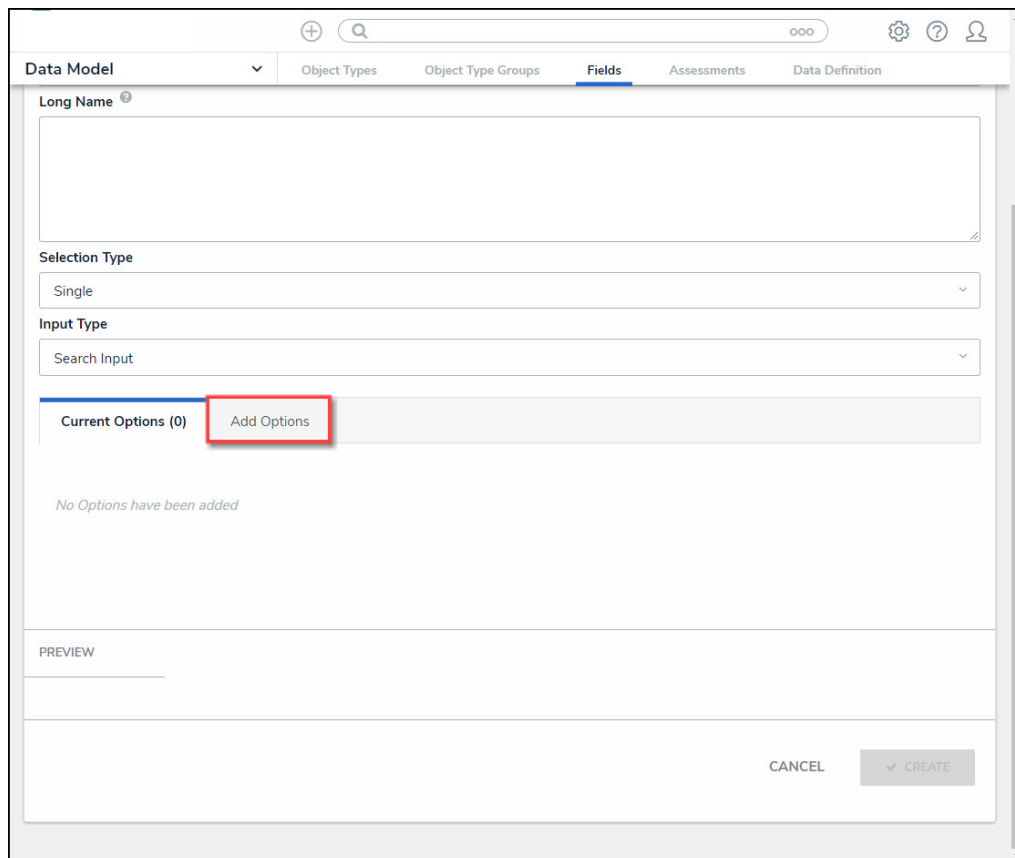
- **Dropdown:** A **Dropdown Input Type** allows users to use a dropdown list to locate and select field options.



Dropdown Input Type Field

Adding Options to a Select List

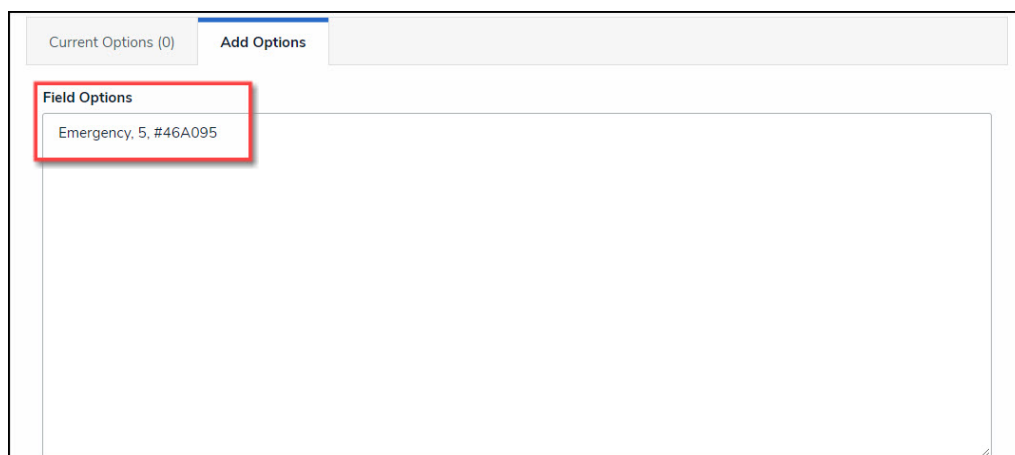
1. Click on the **Add Options** tab to add field options.



The screenshot shows the Resolver interface with the 'Fields' tab selected. The 'Add Options' button is highlighted with a red box. The interface includes a search bar, a 'Data Model' dropdown, and tabs for 'Object Types', 'Object Type Groups', 'Fields', 'Assessments', and 'Data Definition'. The 'Long Name' field is empty. The 'Selection Type' is set to 'Single' and the 'Input Type' is set to 'Search Input'. The 'Current Options (0)' section shows the 'Add Options' button. Below this, a message states 'No Options have been added'. At the bottom, there is a 'PREVIEW' section and 'CANCEL' and 'CREATE' buttons.

Add Options Tab

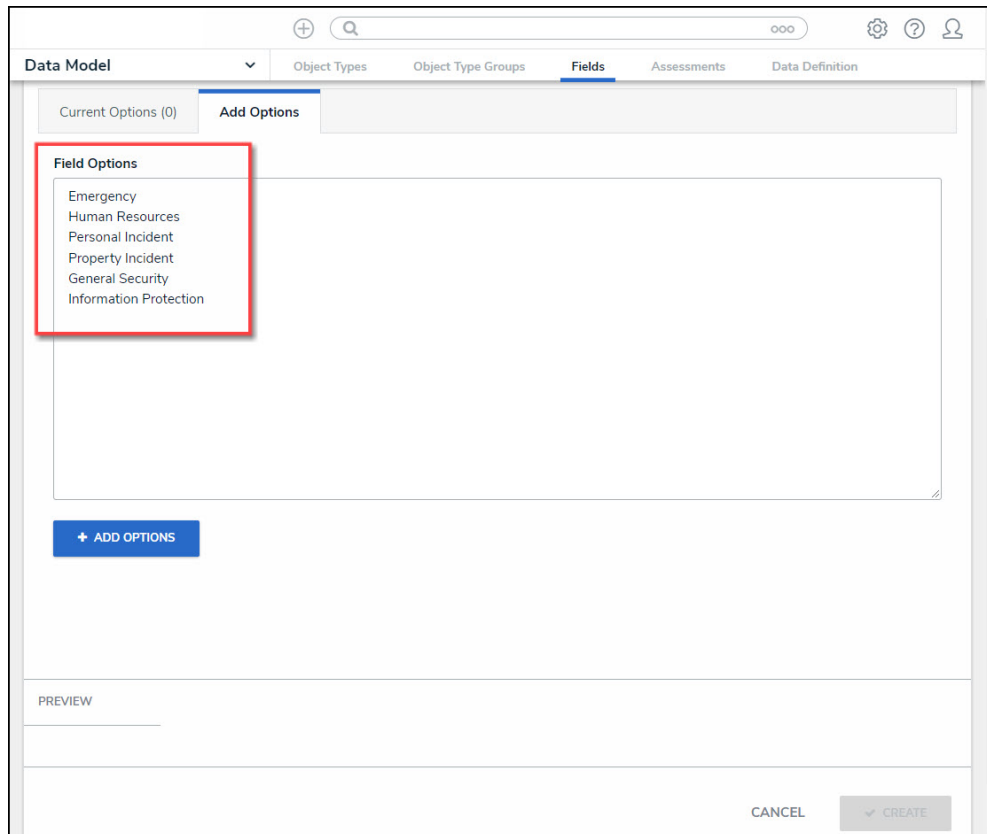
2. Enter field options that will appear in the **Input Type** (e.g., Search Input or Dropdown) in the **Field Options** text box.
 - You can add different field option elements on the same line if you use a comma (,) to separate the elements. Adding elements allows you to add Hex Color Codes and numeric values to a field option.



The screenshot shows a close-up of the 'Field Options' text box. The text 'Emergency, 5, #46A095' is entered into the box. The 'Add Options' tab is highlighted in blue. The 'Current Options (0)' tab is also visible.

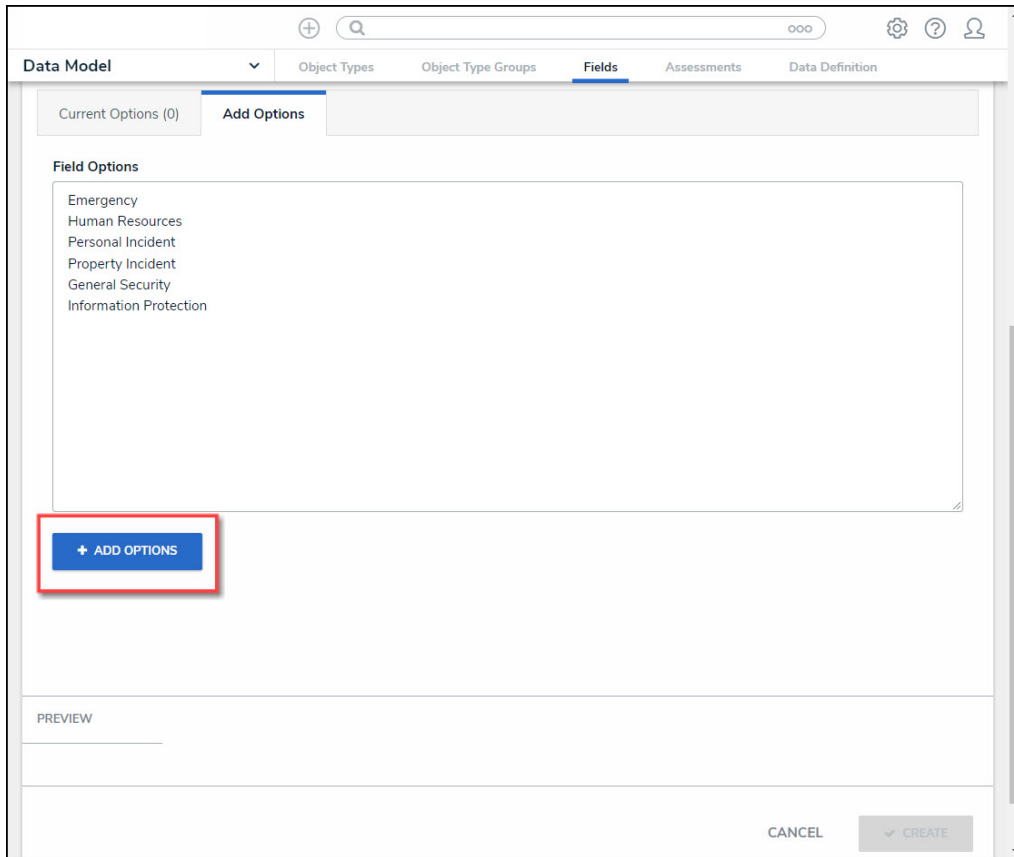
Field Option - Hex Code - Numeric Value

- You can add a total of 1000 options per field.
- You can use up to 300 characters (max) per option.
- Press the **Enter** key to separate each option using a line break.



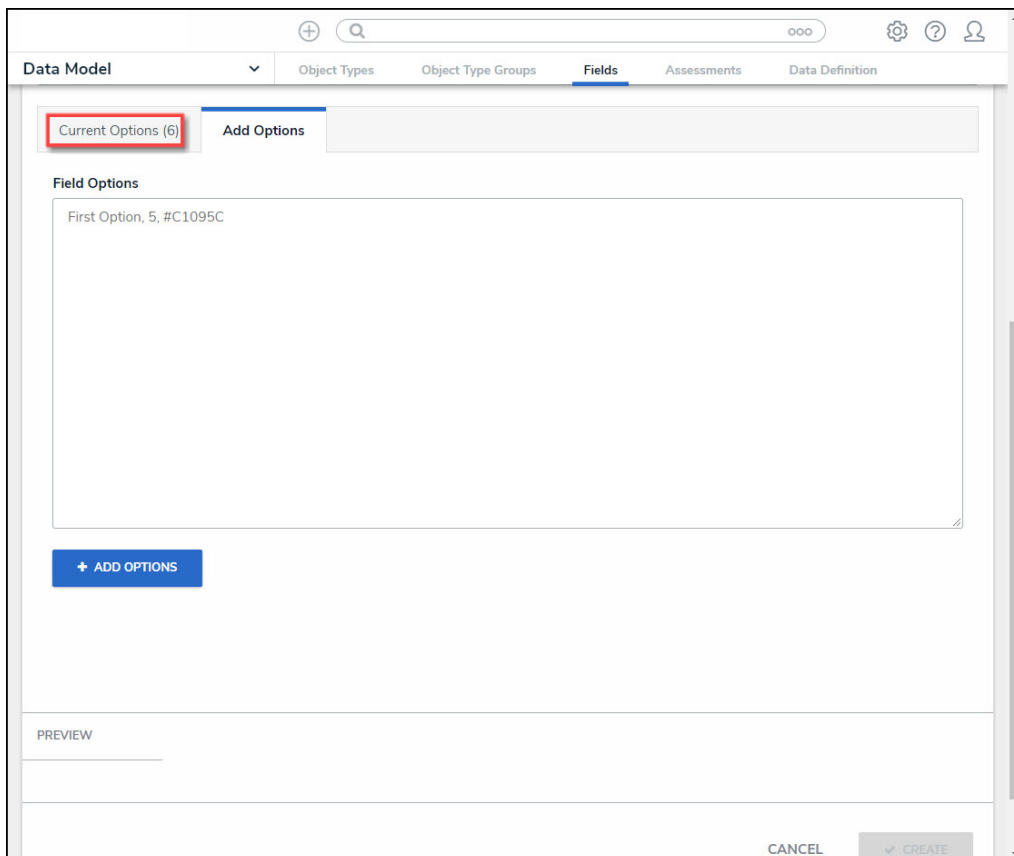
Field Options Text Box

3. Click the **+ Add Options** button to add the Field options to the **Current Options** tab.



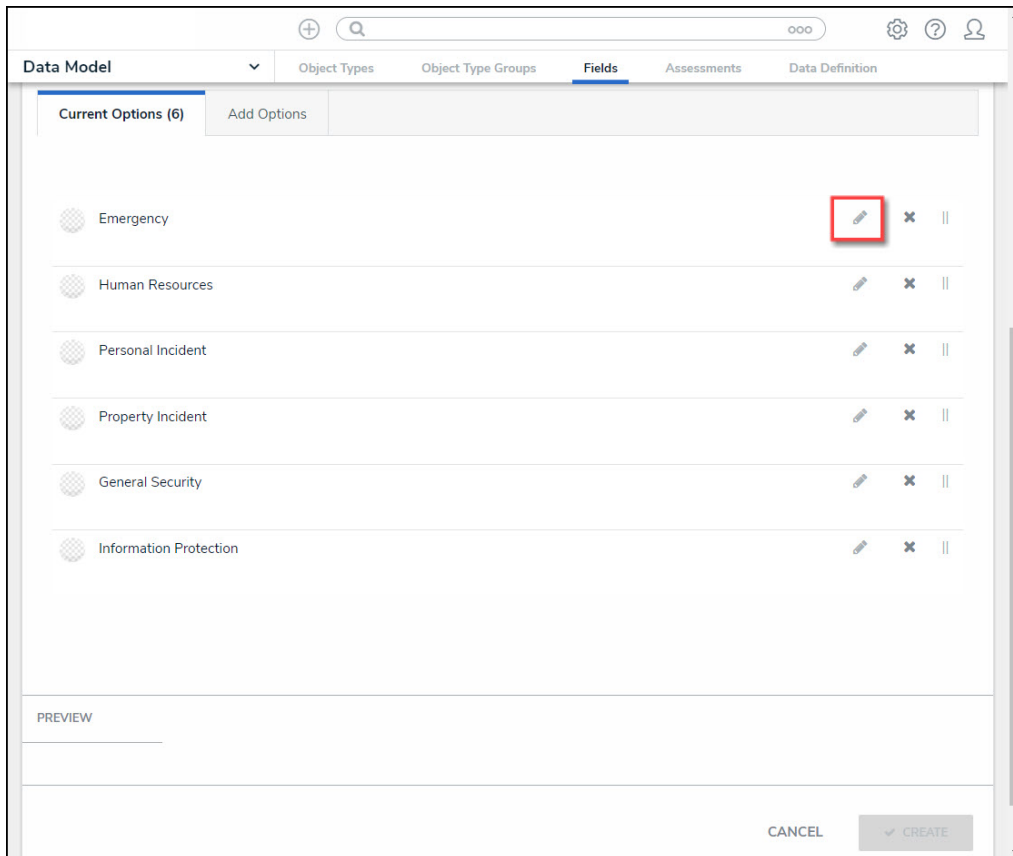
+ Add Options Button

4. The number of field options added is displayed within the **Current Options** tab header.



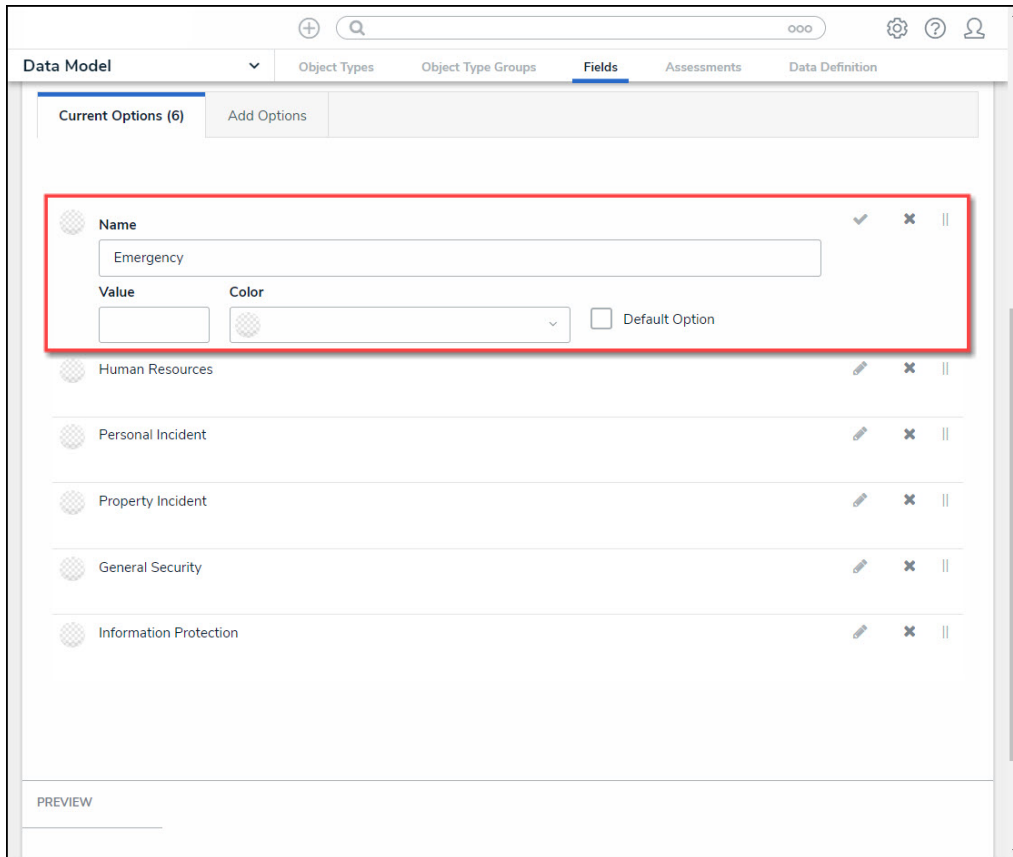
Current Options Tab Header

5. Click on the **Current Options** tab.
6. From the **Current Options** tab, click the **Pencil** (edit) icon next to an option to view/edit its settings.



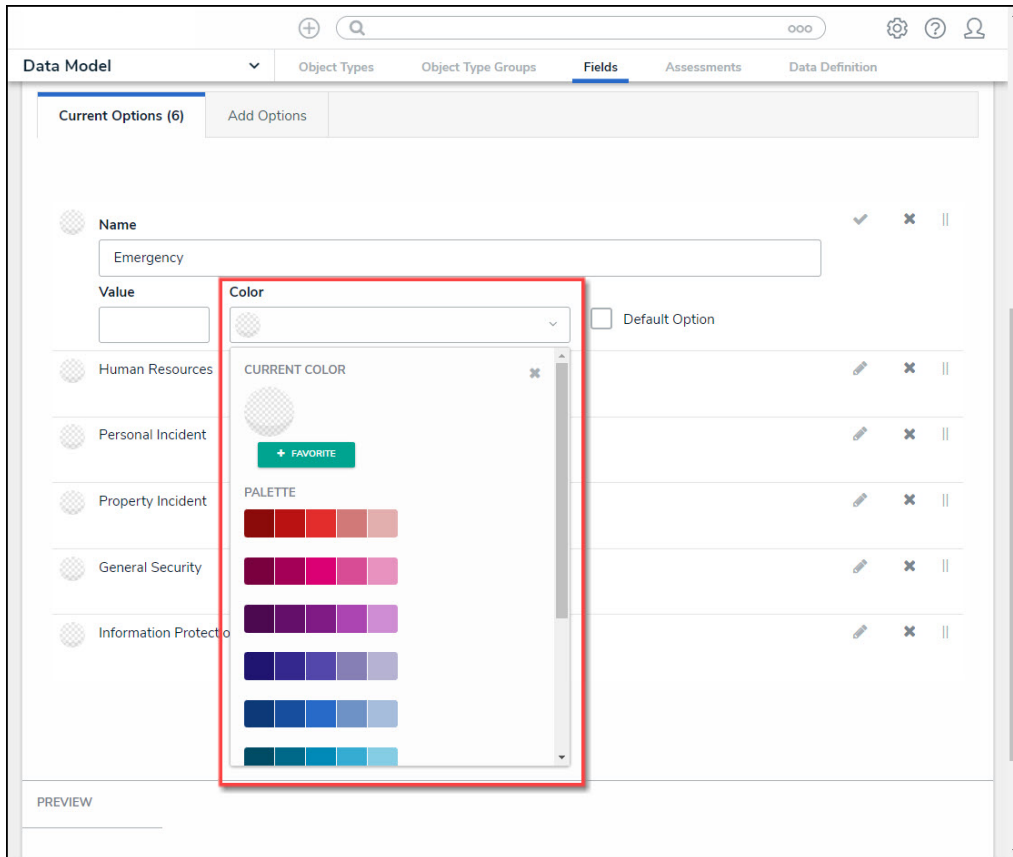
Pencil (Edit) Icon

7. **(Optional)** Edit the following **Field Options Settings**:



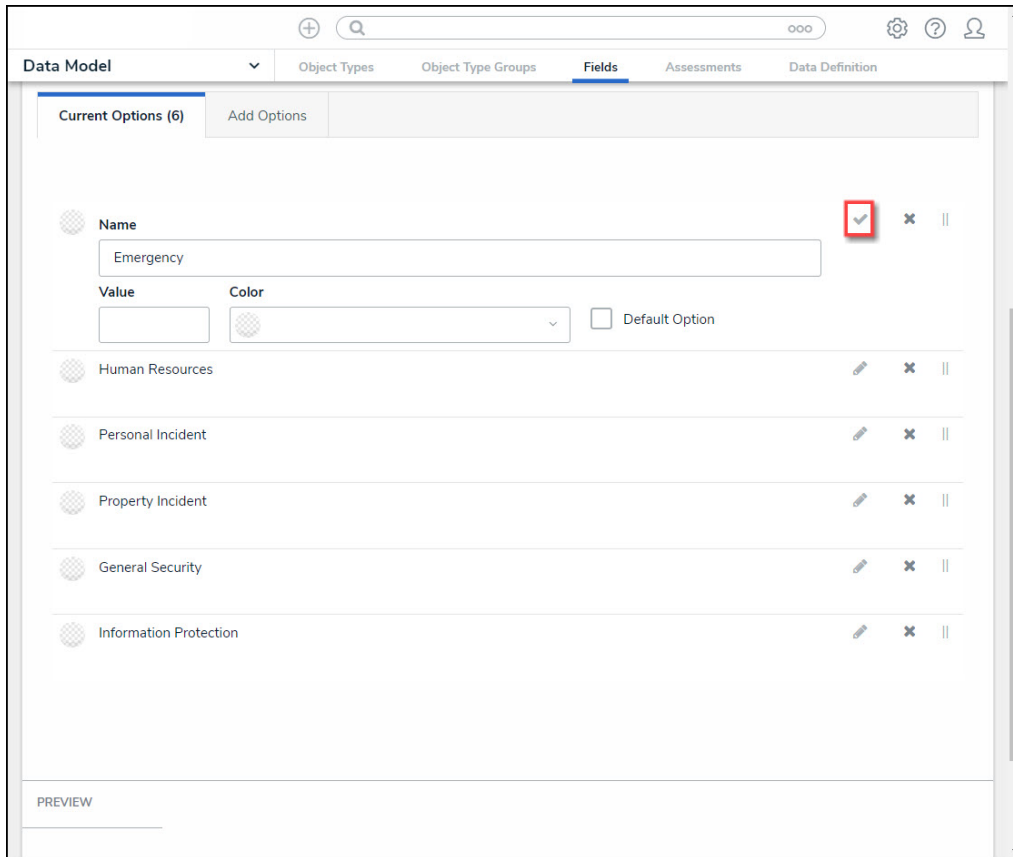
Field Options Settings

- **Name:** Enter a field option name. The **Name** represents the Field Option throughout the system.
- **Value:** Enter a numeric value. The **Value** is used within Formulas throughout the system.
 - The **Value** field will not appear if the field is a Multi-Select List as Multi-Select List cannot be used in Formulas.
 - A **Formula** will display an **Invalid Result** error if it attempts to pull data from a Single Select List Field Option that does not have a value.
- **Color:** Click the **Color** dropdown menu to open the **Color** pop-up. You can either click a color or type a hex color into this field. This color will appear next to the options in the Select List drop-down or search menu.
 - Click on the **+ Favorite** button to add the current color selection to a user-specific list of favorite colors (up to 10).



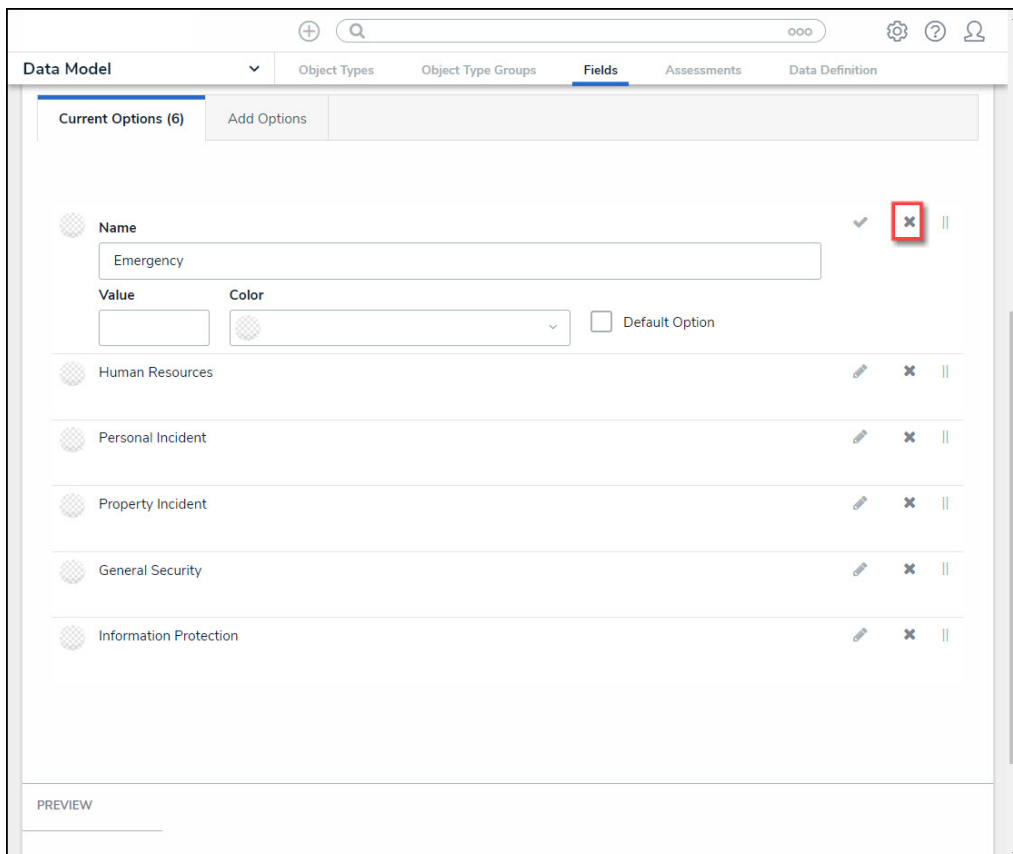
Color Pop-up

- **Default Option:** If the **Default Option** checkbox is selected, the system will automatically select the field option when it appears on an Object Type. A **Default** tag will appear next to the Field Option indicating that the Default Option Checkbox is selected.
 - When changing the **Default Option** from one Field Option to another, any Objects previously saved with the original Default Options that have a **Value:**
 - The **Value** will not update to reflect the new default Field Option's Value.
 - The **Value** will not update to reflect the previous default Field Option's Value.
8. Select the following icons in the **Field Option Settings** section:
- **Confirm Icon:** Click the **Confirm** icon to save any edits and close the settings for that Field Option.



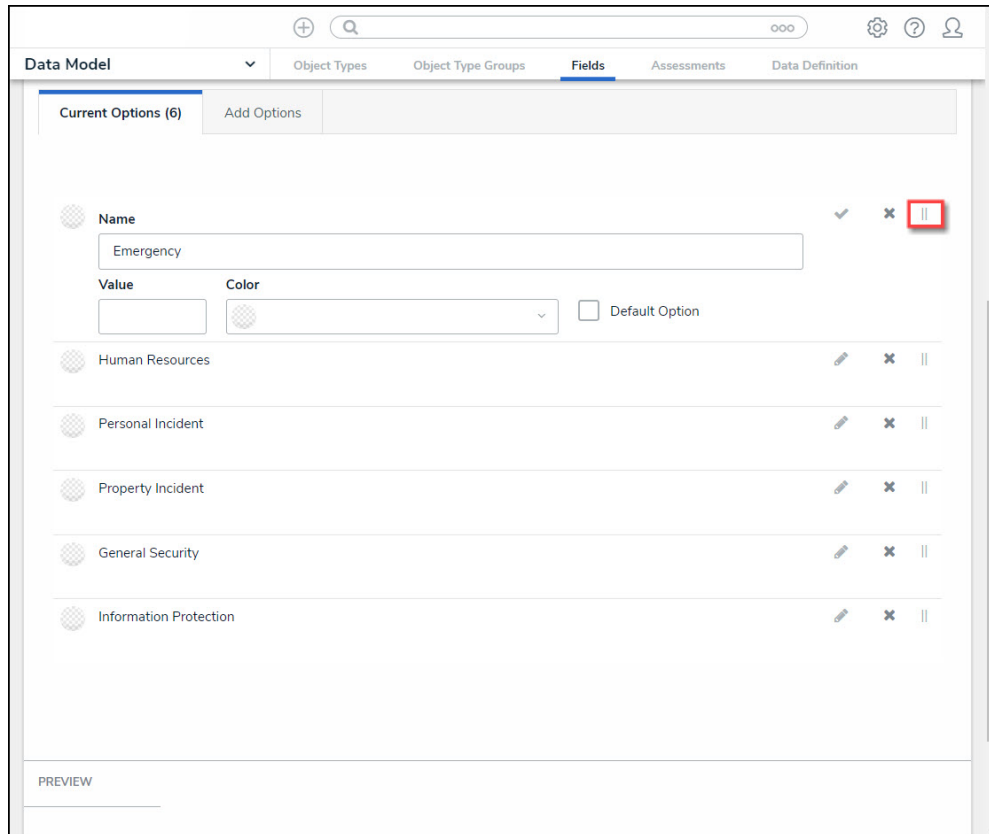
Confirm Icon

- **Delete Icon:** Click the **Delete** icon to delete an option.



Delete Icon

- **Rearrange Icon:** Click and drag the **Rearrange** icon next to the option to reorder how the options will appear on the select list.



Rearrange Icon

9. Click the **Create** button at the bottom of the screen to create the new field.
10. The **Preview** section will preview how the field will look on a form.

The screenshot shows the Resolver interface with the 'Data Model' tab selected. The 'Fields' sub-tab is active, displaying a list of fields: Security, Information, and Other. Each field has edit, delete, and duplicate icons. Below this, a 'PREVIEW' section is highlighted with a red border. It shows a dropdown menu for 'Incident Category' with the following options: Emergency, Human Resources, Personal, Property, Security, Information, and Other.

Preview Section