

Create a New Standard Form

Last Modified on 09/26/2025 1:50 pm EDT

Overview

Once a standard form is created, you can configure its title, set the form's priority, create sections, and add elements.

Note:

When creating forms for use in a repeatable form, note that only forms with supported elements will be displayed. See the Add Repeatable Forms to a Report article for a list of unsupported elements.

User Account Requirements

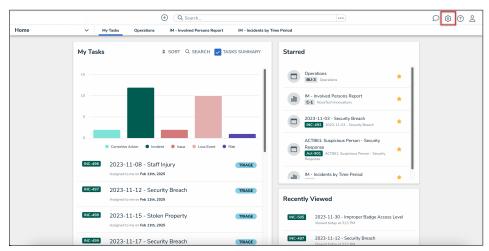
The user must have Administrator permissions in order to access the *Admin Overview* screen.

Related Information/Setup

Please refer to the Standard Forms Overview article for more information on using standard forms.

Navigation

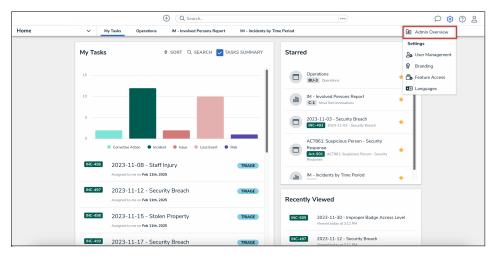
1. From the *Home* screen, click the **Administration** icon.



Administration Icon

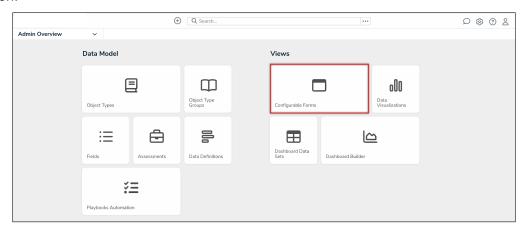
2. From the Administrator settings menu, click the Admin Overview link.





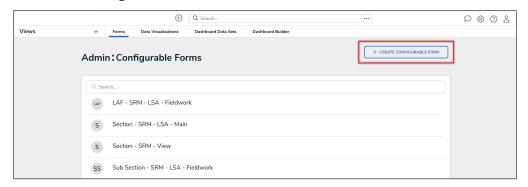
Administrator Settings Menu

From the *Admin Overview* screen, click the **Configurable Forms** tile in the **Views** section.



Configurable Forms Tile

4. Click the Create Configurable Form button.

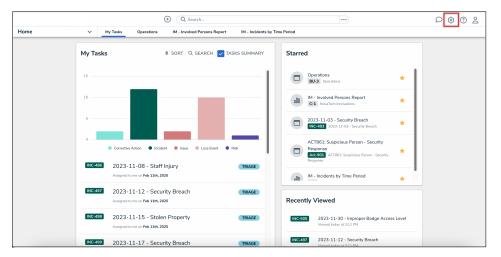


Create Configurable Form Button

Alternate Navigation

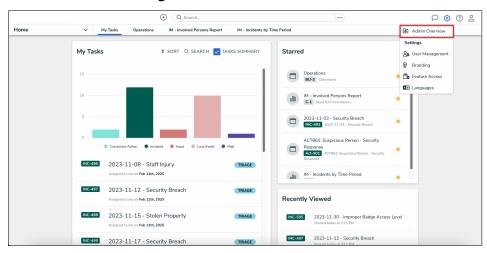
1. From the *Home* screen, click the **Administration** icon.





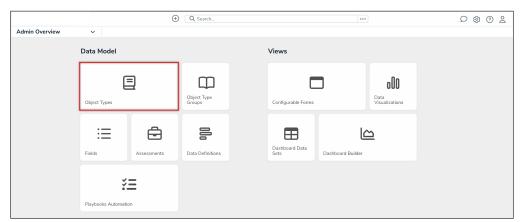
Administration Icon

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



Administrator Settings Menu

3. To create a form from an object type, from the *Admin Overview* screen, click the **Object**Types tile in the **Data Model** section.



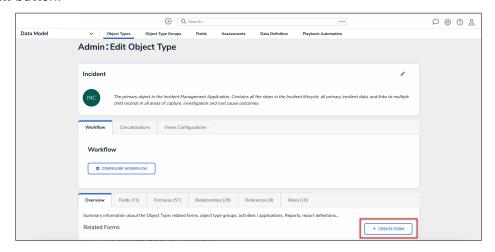
Object Types Tile

a. On the Admin: Object Types screen, from the list of object types, click the object



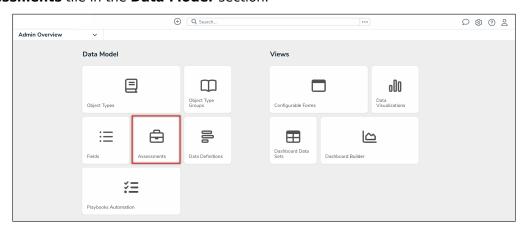
type that you want to create a form from.

b. On the *Admin: Edit Object Type* screen, from the **Overview** tab, click the **Create**Form button.



Create Form Button

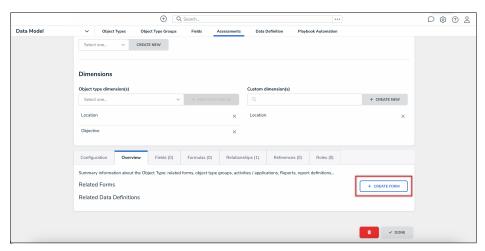
4. To create a form from an assessment, from the *Admin Overview* screen, click the **Assessments** tile in the **Data Model** section.



Assessments Tile

- a. On the *Admin: Assessments* screen, from the list of assessments, click the assessment that you want to create a form from.
- b. On the *Admin: Edit Assessment* screen, from the **Overview** tab, click the **Create**Form button.

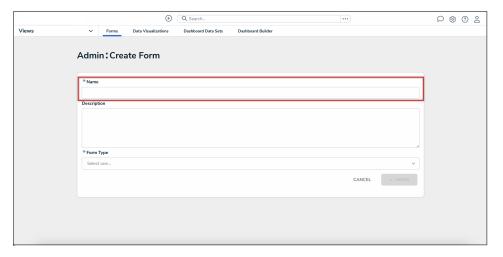




Create Form Button

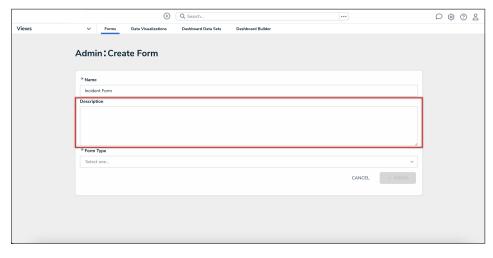
Creating a New Standard Form

1. In the **Name** field, enter a name for the form.



Name Field

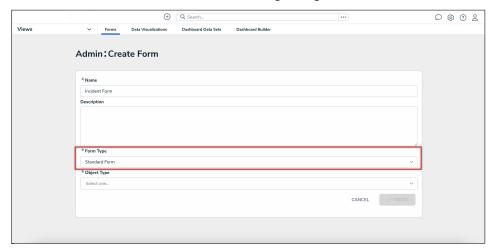
2. **(Optional):** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form.





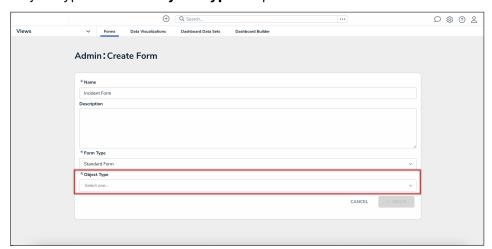
Description Field

3. Select **Standard Form** from the **Form Type** dropdown menu. See the Navigation Forms section for information and instructions on creating navigation forms.



Form Type Dropdown

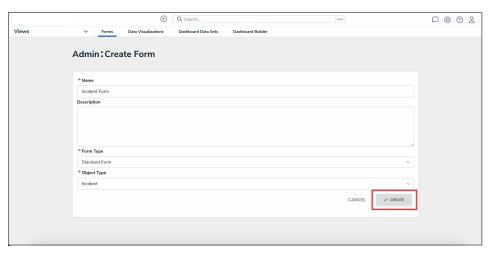
4. Select an object type from the **Object Type** dropdown menu.



Object Type Dropdown

5. Click the **Create** button to display the **Edit Configurable Form** page. From here, you can edit the standard form's title, select a priority, and add sections and elements.





Create Button