

# **Configuring Fields on Forms**

Last Modified on 01/15/2025 10:34 am EST

# Overview

Any fields saved to the object type as components can be displayed on standard forms.

# **User Account Requirements**

The user account you use to log into Resolver must have Administrator permission to use the Configurable Forms feature.

# **Related Information/Setup**

Please see the Add Fields to an Object Type article for more information on adding a Field to an Object Type.

Please see the Enable and Assessment Table on a Form article for more information on enabling an Assessment table on a Form.

Please see the Enable a Trending Table on a Form article for more information on enabling a Trending table on a Form.

### Navigation

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



Administration Icon

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



|      |            | Q Search |             |  | 0                 | 2 |
|------|------------|----------|-------------|--|-------------------|---|
| Home | ✓ My Tasks |          |             |  | Admin Overview    |   |
|      |            |          |             |  | Settings          |   |
|      | My Tasks   | \$ SOR   | RT Q SEARCH |  | 😂 User Management |   |
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Administrator Settings Menu

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

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| Admin Overview | ~                   |             |                       |                        |                   |                                      |                |
|                | Data Model          |             |                       | Views                  |                   |                                      |                |
|                | Object Types        | 3           | Object Type<br>Groups | Configurable Forms     |                   | <b>DOD</b><br>Data<br>Visualizations |                |
|                | Fields              | Assessments | Data Definitions      | Dashboard Data<br>Sets | Dashboard Builder | <u>۲</u>                             |                |
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Configurable Forms Tile

4. From the *Configurable Forms* screen, enter a form name in the **Search** field to narrow down the forms list.

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| Views | ~     | Forms Data Visualizations Dashboard Data Sets Dashboard Builder   |                            |      |
|       | Admi  | n:Configurable Forms  | + CREATE CONFIGURABLE FORM |      |
|       | Q Act | vity  | ٥                          |      |
|       | Act   | Activity - CC - Create  |                            |      |
|       | Act   | Activity - CC - Create - Log  |                            |      |
|       | Act   | Activity - CC - Detailed Repeatable Form<br>Repeating Form only. Contains expanded activity information for a detailed report view.                   |                            |      |
|       | Act   | Activity - CC - Details Navigation<br>Navigation view leveraged to review the details of an <mark>activity</mark> from an <mark>activity</mark> form. |                            |      |
|       | Act   | Activity - CC - Edit  |                            |      |

Search Field



5. Click the form that you want to edit.

## **Configuring Fields on Forms**

Required fields added to a state must be added to any applicable standard forms, otherwise, users cannot view and complete the required fields to transition the object to the next state. Unless the **Bypass Required Fields** toggle is selected when editing the transition.

1. From the *Admin: Edit Configurable Form* screen, scroll to the Form's Canvas and hover the cursor over a **Field** and select the **Edit** icon.

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Edit Icon

- 2. From the *Edit Component Display* pop-up, select a Header Display option:
  - **Display Name:** This option uses the value in the **Field Name** field as the Field's label on the Form.
  - **Display Long Name:** This option uses the value(s) in the **Long Name** field as the Field's label on the Form.

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|       |                     | Header display          |       |               |          |
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|       |                     | Trending table          |       |               |          |
|       |                     | Enable Trending Table   |       |               | <b>F</b> |
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#### Header Display Options

3. Depending on the Field (plain text, numeric, select list, formula, or date and time) selected, an **Assessment Table** section may also appear on the *Edit Component Display* pop-up, allowing users to display previous assessment data in an **assessment table** on a standard form. Please see the Enable and Assessment Table on a Form article for more information.

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Assessment Table Section

4. Depending on the Field (single select list, numeric field or formula) selected, a Trending Table section may also appear on the Edit Component Display pop-up allowing users to analyze how objects or values change over multiple timeframes. Please see the Enable a Trending Table on a Form article for more information.

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Trending Table Section

- 5. If the field is a numeric or select list Field, the **Format** section will appear, allowing the user to apply a format option to the field:
  - Dropdown



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|   |     |   |
| Vendor Products   |     | ľ |
|   |     |   |
| Does this vendor provide a product that processes data? |     |   |
| Select one  | ~   |   |
|   |     |   |

### Dropdown Menu

• Toggle Button Group

|   |                                 |                          |                | / | ÷ |  |
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| ١ | Vendor Products                 |                          |                |   |   |  |
|   |                                 |                          |                |   |   |  |
|   | Does this vendor provide a prod | uct that processes data? |                |   |   |  |
|   | Yes                             | No                       | Not Applicable |   |   |  |
|   |                                 |                          |                |   |   |  |

### Toggle Button Group

• Radio Buttons

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| Vendor Products   |   |   |
| Does this vendor provide a product that processes data? |   |   |
| ◯ Yes   |   |   |
| No  |   |   |
| O Not Applicable  |   |   |

Radio Buttons