

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

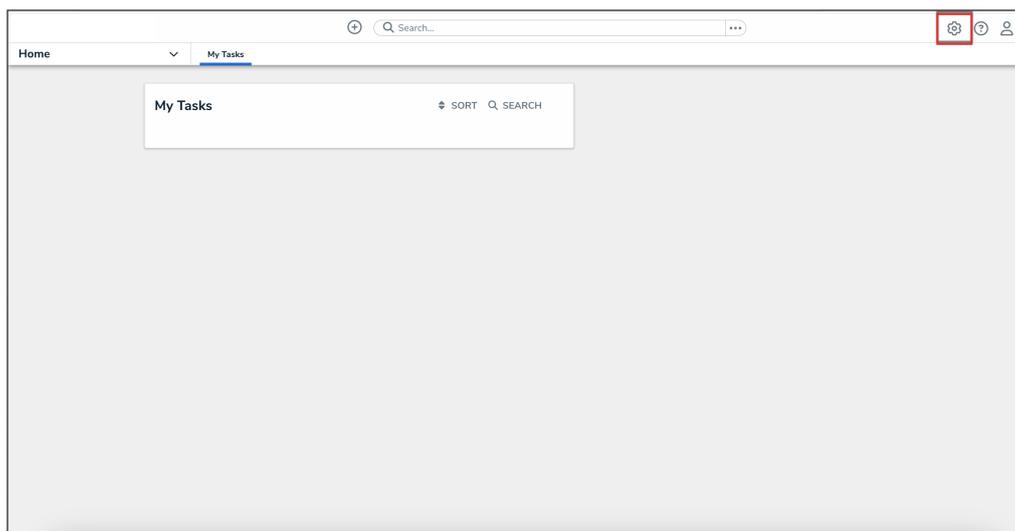
Please see the [Add Fields to an Object Type](#) article for more information on adding a Field to an Object Type.

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.

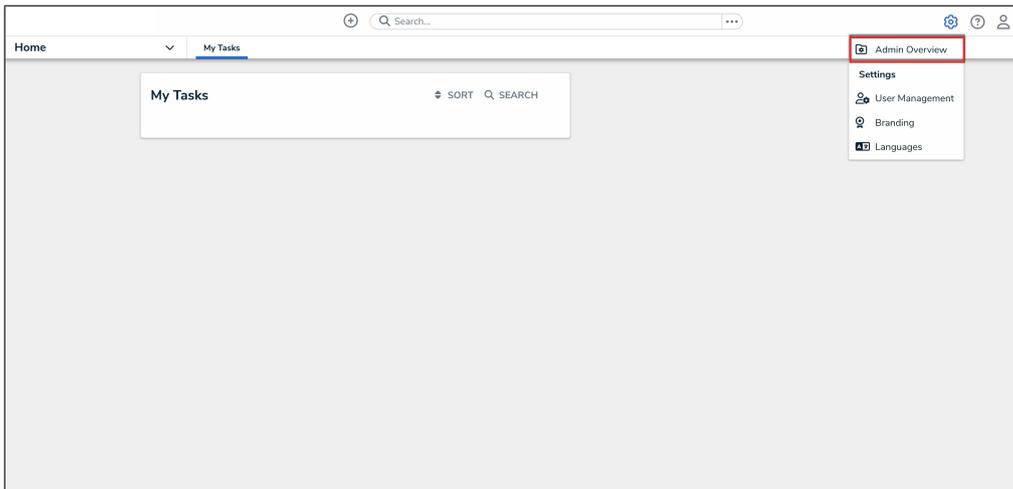
Navigation

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



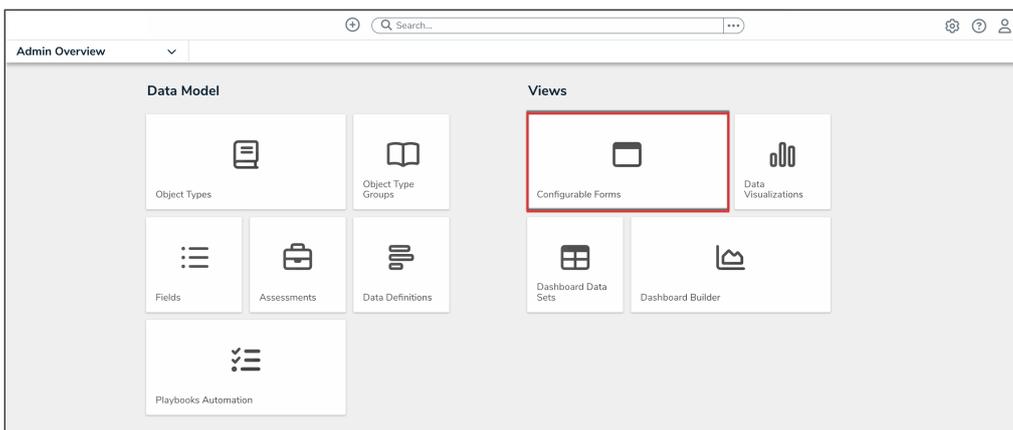
Administration Icon

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



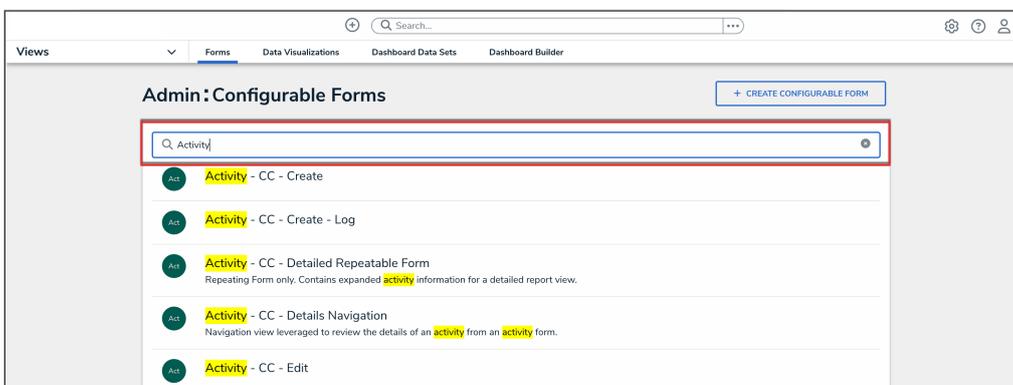
Administrator Settings Menu

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



Configurable Forms Tile

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



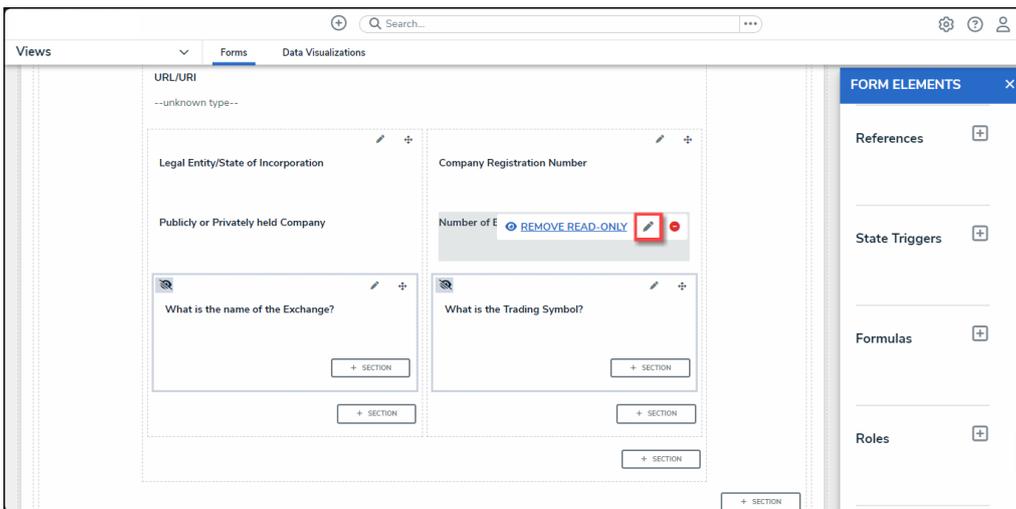
Search Field

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.

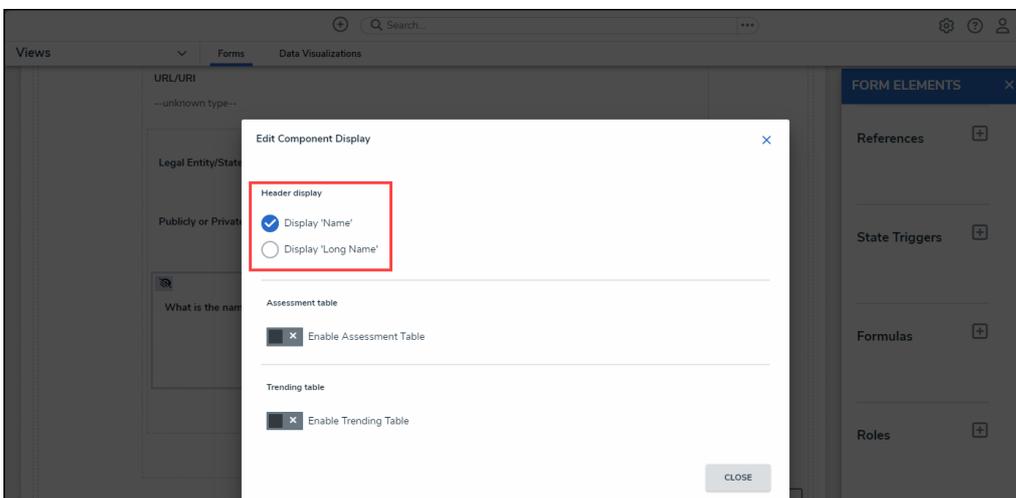
1. From the **Admin: Edit Configurable Form** screen, scroll to the Form's Canvas and hover the cursor over a **Field** and select the **Edit** icon.



Edit Icon

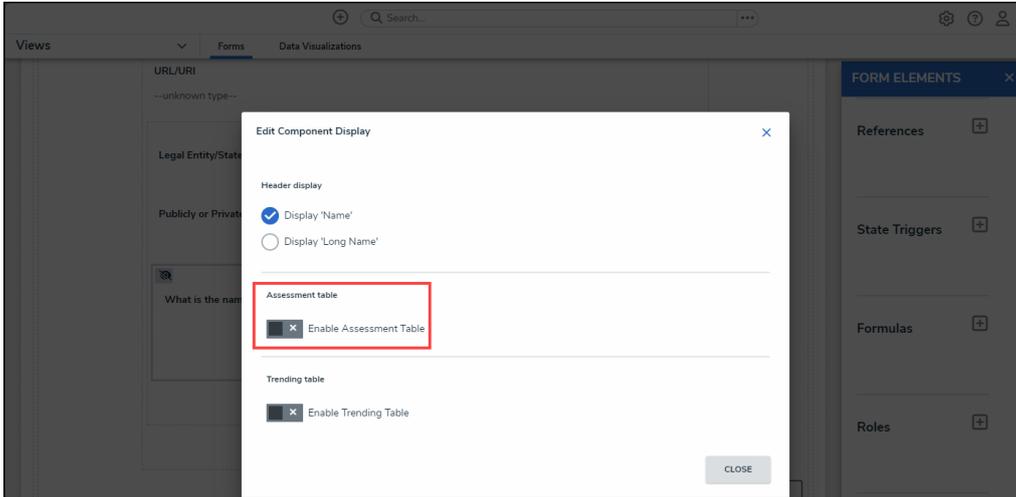
2. From the **Edit Component Display** pop-up, select a Header Display option:

- **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.



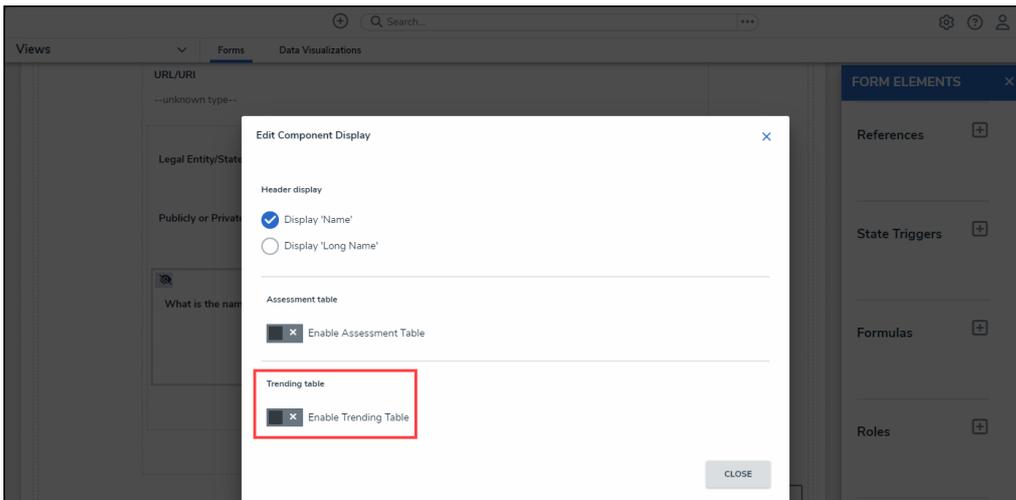
Header Display Options

- 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.



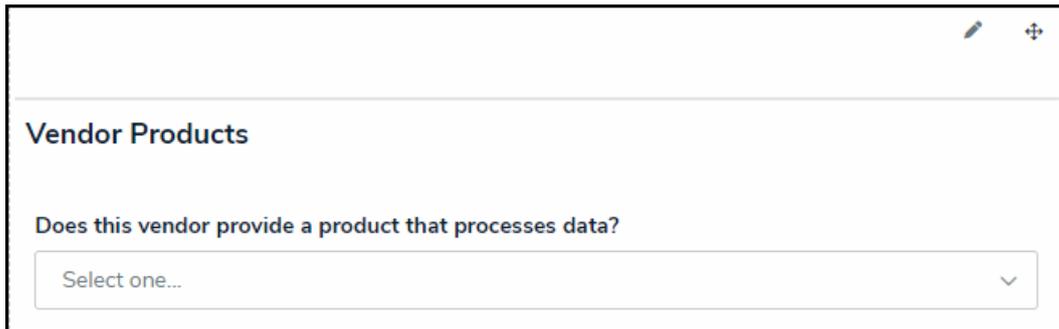
Assessment Table Section

- 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.



Trending Table Section

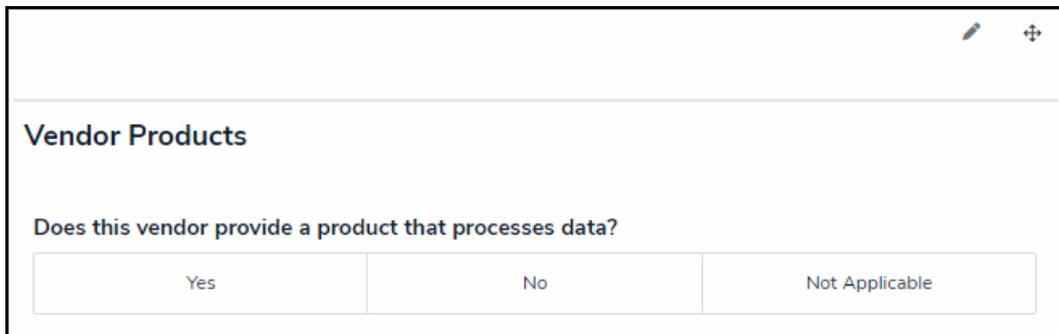
- If the field is a numeric or select list Field, the **Format** section will appear, allowing the user to apply a format option to the field:
 - Dropdown



The screenshot shows a form titled "Vendor Products" with a question: "Does this vendor provide a product that processes data?". Below the question is a dropdown menu with the text "Select one..." and a downward arrow icon.

Dropdown Menu

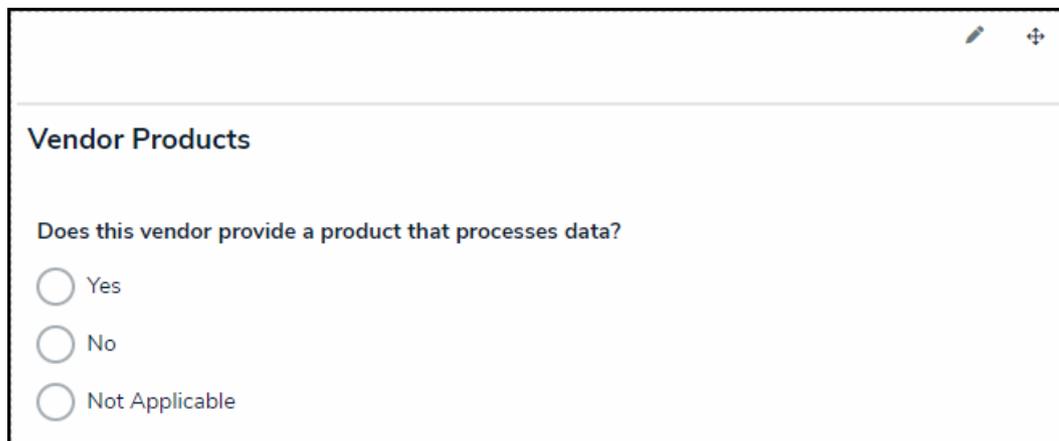
- Toggle Button Group



The screenshot shows a form titled "Vendor Products" with a question: "Does this vendor provide a product that processes data?". Below the question is a toggle button group with three buttons: "Yes", "No", and "Not Applicable".

Toggle Button Group

- Radio Buttons



The screenshot shows a form titled "Vendor Products" with a question: "Does this vendor provide a product that processes data?". Below the question are three radio buttons labeled "Yes", "No", and "Not Applicable".

Radio Buttons