

Relationships on Forms

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Relationships can be displayed on standard forms as dropdown menus or tables, where end users can search for and/or create new objects through that relationship, depending on the element's settings. Before the relationship element can be added to a form, it must be added to the object type as a component. See [Add Relationships to an Object Type](#) for more information.

Format & Display Options

By default, relationships are added to the form canvas as a dropdown menu, displaying its name (versus the long name), but you can configure the element to choose how the relationship is displayed, which functionality is available, and which form is displayed when creating a new object.

Format options include:

- **Enable Search:** Allows end-users to search for and view existing objects to add to the relationship.



Searching is limited to the object's name, description, or unique ID.

- **Include Archived Data in Search Results:** Allows admins to control whether [archived objects](#) will be visible when end-users are searching for existing objects from the relationship element. This option will not be visible if the **Enable Search** option is not selected.
- **Enable Create:** Allows end-users to create new objects and add them to the relationship.
- **Enable Unlink:** Allows end-users to remove objects from the relationship on the form and unlink them from the relationship object.
- **Enable Advanced:** Allows end-users to search for, select, or create objects from a palette after clicking **Add Existing [Object]** or **Create New** links on the form.

Controls				
Unique ID	Name	Design Effectiveness	Operating Effectiveness	Workflow State
C-6	Control 1	Not Effective	Effective	Draft

Start typing to find an ...

Issues	
Name	Workflow State
Issue 3	Draft
Issue 1	Open

Q ADD EXISTING ISSUES + CREATE NEW

The highlighted reference table demonstrating how the advanced display appears on a form, whereas the reference above is displaying the default interface

Display options include:

- **Dropdown:** Displays the relationship as a dropdown menu.

Risks

Employee relations (union-based) x

+

A relationship dropdown menu.

- **Table:** Displays the relationship as a table. The objects are displayed in descending order based on their Unique IDs.

Risks			
<input type="text" value="Search Table..."/>			
Monogram	Unique ID	Name	
R	R-58	Safety	×
R	R-31	Business Continuity	×
R	R-30	Tone at the Top	×
R	R-29	Unethical behaviour	×
R	R-28	Bribery & Corruption	×
R	R-27	Fraud	×
R	R-18	Local, regional, national political environment	×
R	R-17	Corporate Governance	×
R	R-16	Transparency & Financial Integrity	×
R	R-15	Risk Oversight	×



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Relationships displayed as a table with search and advanced options enabled.

- **Map:** Displays a map with pins representing any recorded locations of the originating object and/or relationship objects. If location data isn't enabled or recorded, the map will not display any data. See the [Locations](#) section for more details.

Instructions

To configure a relationship on a standard form:

1. If needed, open the form you wish to add the relationship element to by clicking the  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.
2. **Add** the relationship element to the form, hover your cursor over the relationship on the canvas, then click the  icon to open the **Edit Component Display** window.
3. Click **Display 'Long Name'** to display the relationship's long name on the form. By default, **Display 'Name'** is selected. To add or edit a long name, open the **Edit Object Type** page for the form's object type, click the **Relationships** tab, then click the relationship to open the **Edit Relationship** palette and make changes as required.
4. Select one or more of the following options:
 - **Enable Search:** Allows end-users to search for existing relationship objects.
 - **Include Archived Data in Search Results:** Allows end-users to search for or view archived

objects through the form element. This option won't be visible unless the **Enable Search** option is enabled. See the [Archived Data](#) section for more information.

- **Enable Create:** Allows end-users to create new objects through the relationship.
- **Enable Unlink:** Allows end-users to remove objects from the relationship on the form and unlink them from the relationship object.
- **Enable Advanced:** Displays the advanced user interface for the relationship on a form. When this option is enabled, clicking **Add Existing [Object]** will open a palette that allows users to search for and select one or more objects or assessment objects (if any) to add to the relationship.

5. To display the relationship as a dropdown menu, leave **Dropdown** selected under **View Relationship as:** This option is selected by default.

6. To display the relationship as a table:

- Select **Table** under **View Relationship as:** then click to select the properties and fields from the object type(s) in the relationship that you want to include on the table as columns. The columns will appear on the table in the order they were selected in the **Build the Relationship Table** settings.

Select the Properties and Fields to include as columns.

Name	
Description	
Unique ID	
Monogram	
Created By	
✓ Created On	
Modified By	
Modified On	
✓ Workflow State	
✓ External Reference Id	
External Data Source	FIELD COMPANY
Stack	FIELD COMPANY
Profile Photo	FIELD COMPANY
✓ Business Unit	RELATIONSHIP COMPANY

Display colored cells as ovals

Selecting the properties and fields that will appear on the relationship table as columns.

Relationship tables with more than 10,000 rows of data will not load



correctly. For larger data sets, it's recommended that a [Form Action](#) element is added to a form to redirect users to view the data in a report.

- b. **Optional:** Select the **Display colored cells as ovals** checkbox to show formula or select list cells as text with colored circles. When this option is not selected, cells are displayed with text and full background color, if any.
7. To display the relationship as a map, select **Map** under **View Relationship as:** Selecting this option will display a map with pins representing any recorded locations of the originating object and/or relationship objects. If location data isn't enabled or recorded, the map will not display any data. See the [Locations](#) section for more details.



Selecting the **Map** option disables the **Enable Create** and **Enable Advanced** format options.

8. For both the dropdown and table options, below **Object Type Forms**, select the form(s) the users will complete if they're creating new objects through the relationship.

Object Type Forms

Select creation form to use for each Object Type.

Employee Record

Employee Record ▼

Person

People ▼

Selecting the configurable form that will be displayed when an end-user creates a new object through a relationship.



If no configurable form(s) has been created for the object type(s) in the relationship, the default form(s) will be selected automatically.

9. Click **Close** when finished.