Configuring References on a Form

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Overview

A **Reference** element in a standard form indicates that an object is referenced to other objects through a relationship. Administrators can configure how the information is displayed, as well as what tasks end-users can do through the Reference element. You must add a form's object type to a relationship on another object type before adding a reference to a form.

The data available in the **Reference** element belongs to the object type(s) where the relationship was initially created. For example, if the Vehicle object type is saved in a relationship with the Incident object type, the data displayed on the form will be from the Incident object type.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to configure a reference on a Form.

Related Information/Setup

Please refer to the Add References to an Object Type article for more information on References.

Please refer to the Standard Form Elements section for more information on creating a configurable form.

Please refer to the Archived Data section for more information on Archiving Data.

Please refer to the Adding Form Elements to a Standard Form article for more information on adding a Reference to a Form.
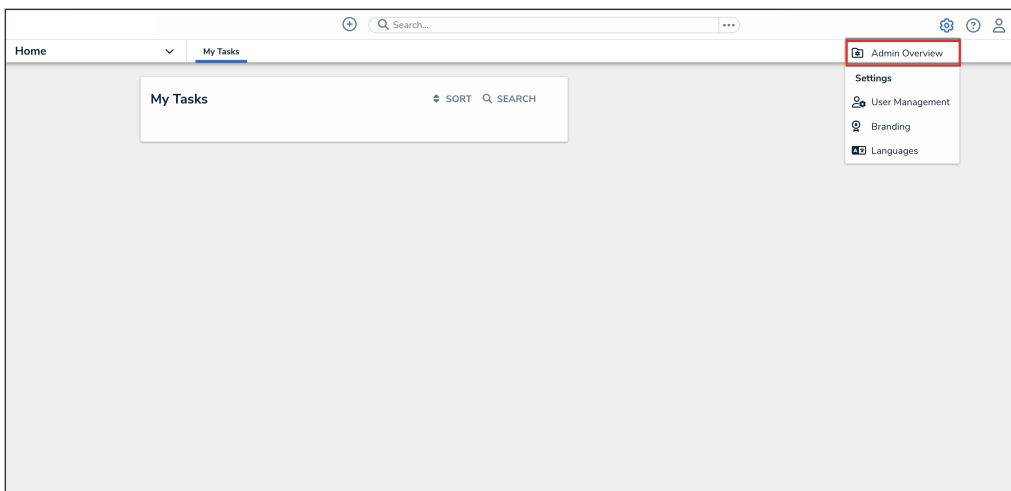
Navigation

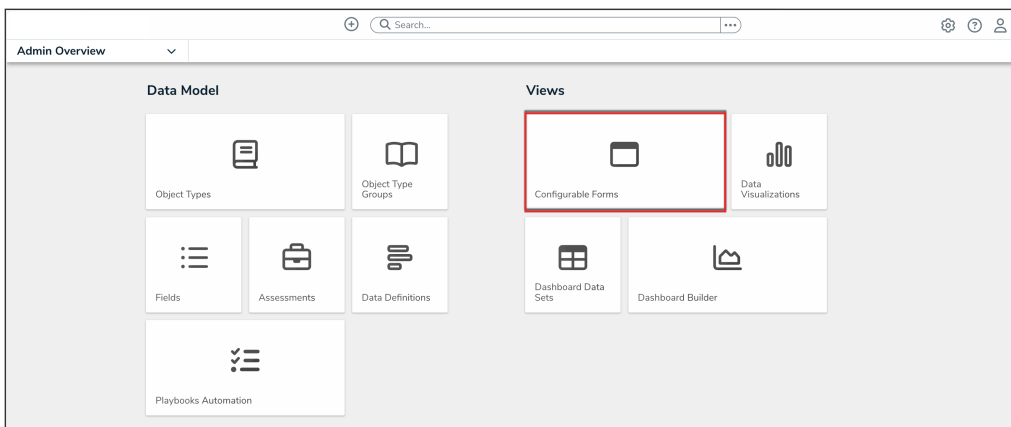1. From the *Home* screen, click the **Administration** icon.
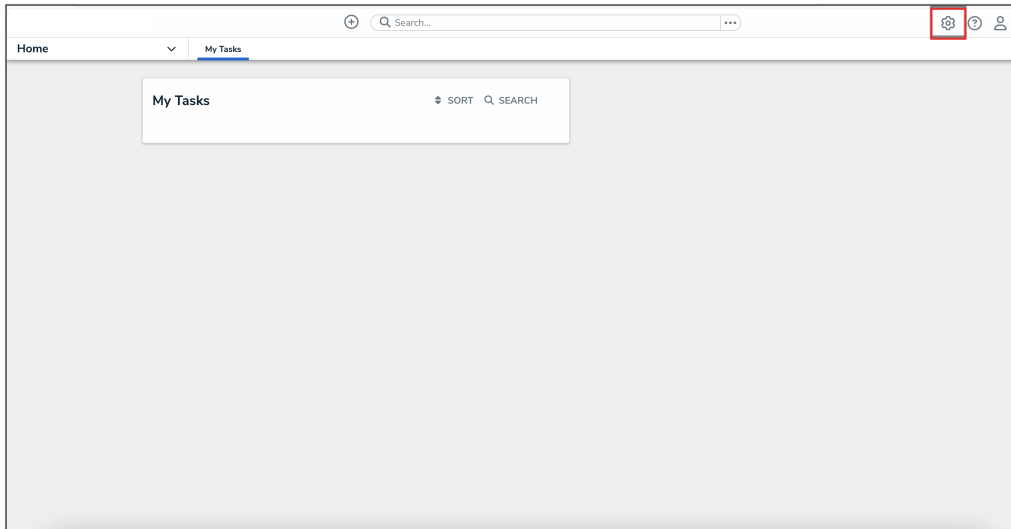
Administration Icon

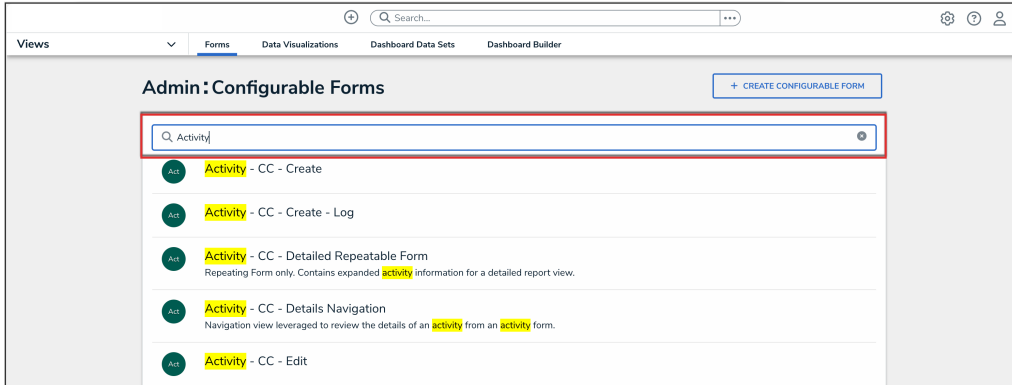2. From the **Administrator Settings** menu, click **Admin Overview**.

Administrator Settings Menu

3. From the **_Admin Overview_** screen, click the **Configurable Forms** tile under the **Views** section.

Configurable Forms Tile

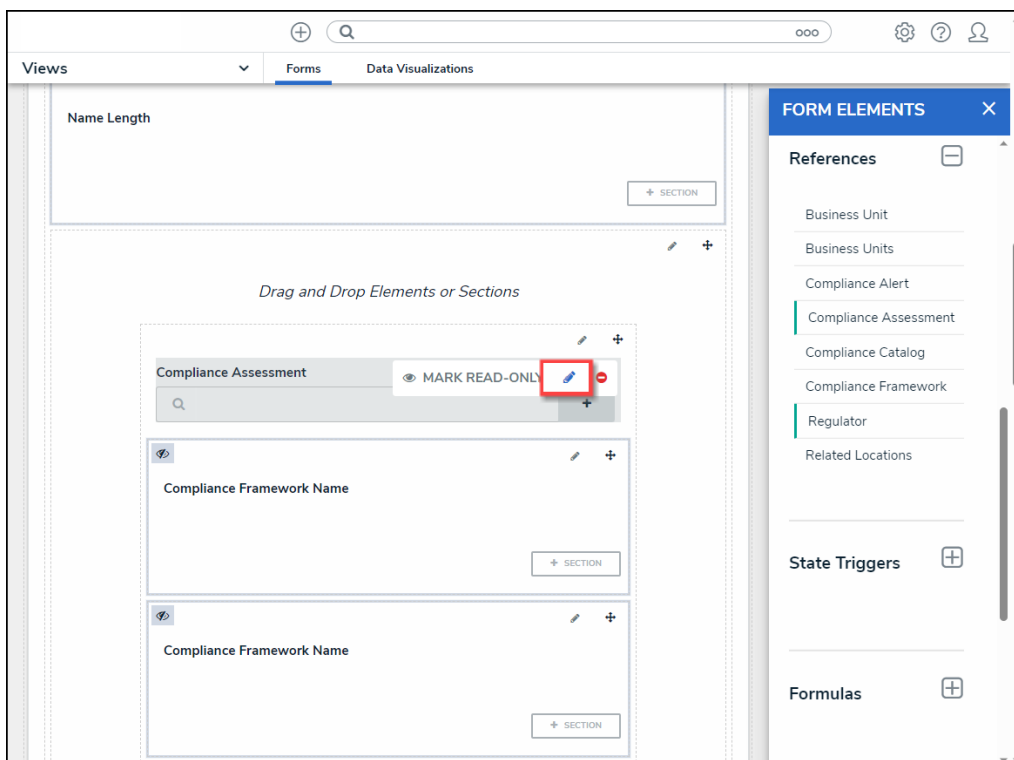4. From the **Configurable Forms** screen, enter a form name in the **Search** field to narrow down the forms list.

Search Field

5. Click the form that you want to edit.

Configure a Reference on a Standard Form

References that are not named will not appear on the relationship & Reference table. For References to appear on the relationship & Reference table, they require a name.

1. From the **Admin: Edit Configurable Forms** screen, hover your cursor over the Reference and click the **Edit** icon.

2. From the **Edit Component Display** pop-up, click the **Display Long Name** radio button to display the relationship's long name on the form. Relationship Long Names are added on the **Edit Relationship** pop-up when creating a relationship.
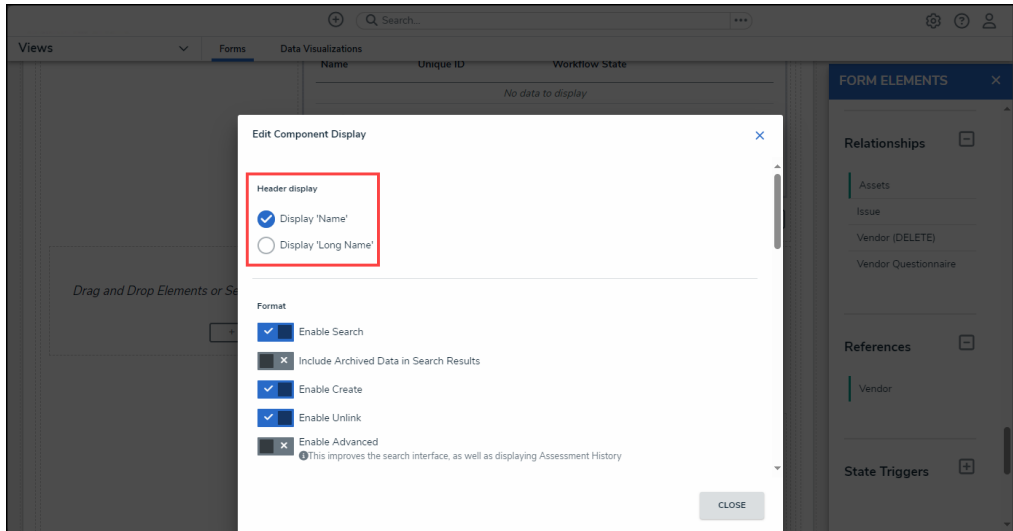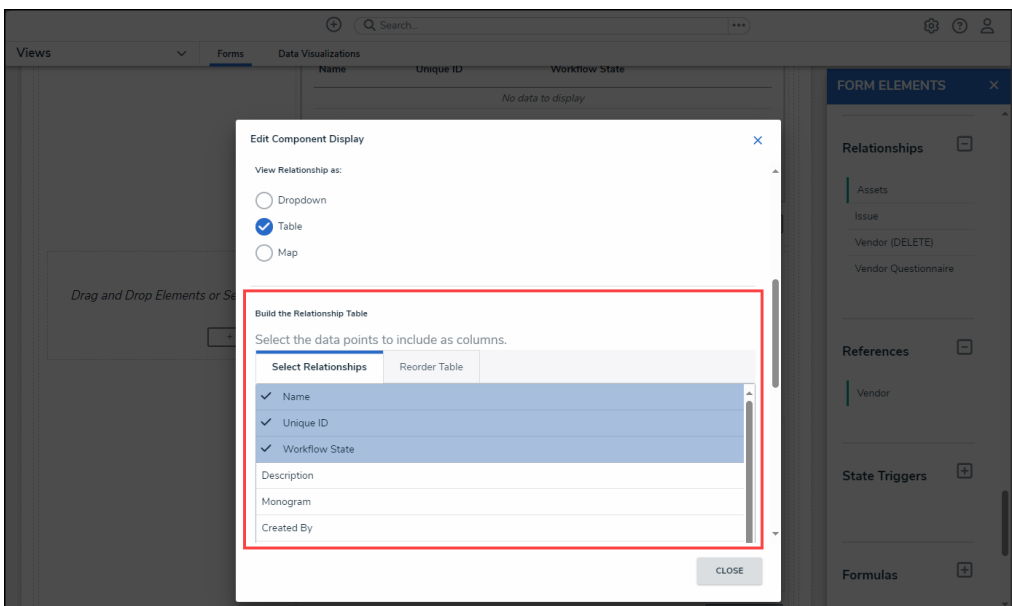

Display Long Name Radio Button

3. Select formatting options from the **Format** section:

- **Enable Search:** End-users can search for existing reference objects.
- **Include Archived Data in Search Results:** End-users can search for or view archived objects through the form element. This option will only be visible if the **Enable Search** option is enabled. See the Archived Data section for more information.
- **Enable Create:** End-users can create new objects through the reference.
- **Enable Unlink:** End-users can remove objects from the reference on the form and unlink them from the reference object.
- **Enable Advanced:** Displays the advanced user interface for the form reference. 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 reference.
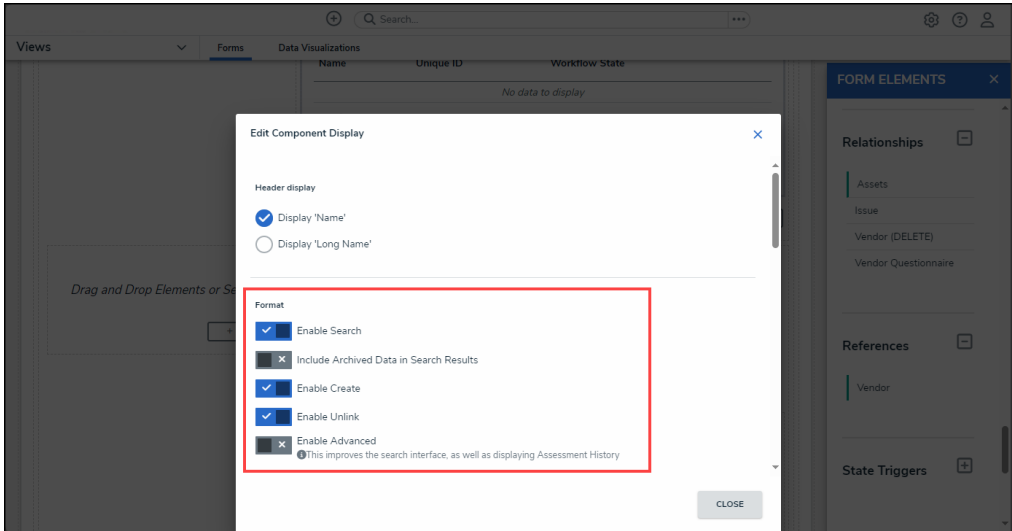
Format Section

4. Select a **View Relationship as** option:

- **Dropdown:** The Dropdown option display the relationship as a dropdown menu. This option is selected by default.
- **Table:** The Table option displays the relationship as a table.
- **Build the Relationship Table:** The Build the Relationship Table section will appear when selecting the Table option. Click data points (properties and fields) from the list to include on the table as columns (e.g., if the Vehicle object type is referenced in a relationship on the Incident object type, you can display properties and fields from Incident in the table). Columns will appear on the table in the order they are selected.
  - Reference 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**.**

- **Reorder Table:** Click the **Reorder Table** tab and use the **Move** icon to rearrange the order of the columns as they appear on the table.
- 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**.**
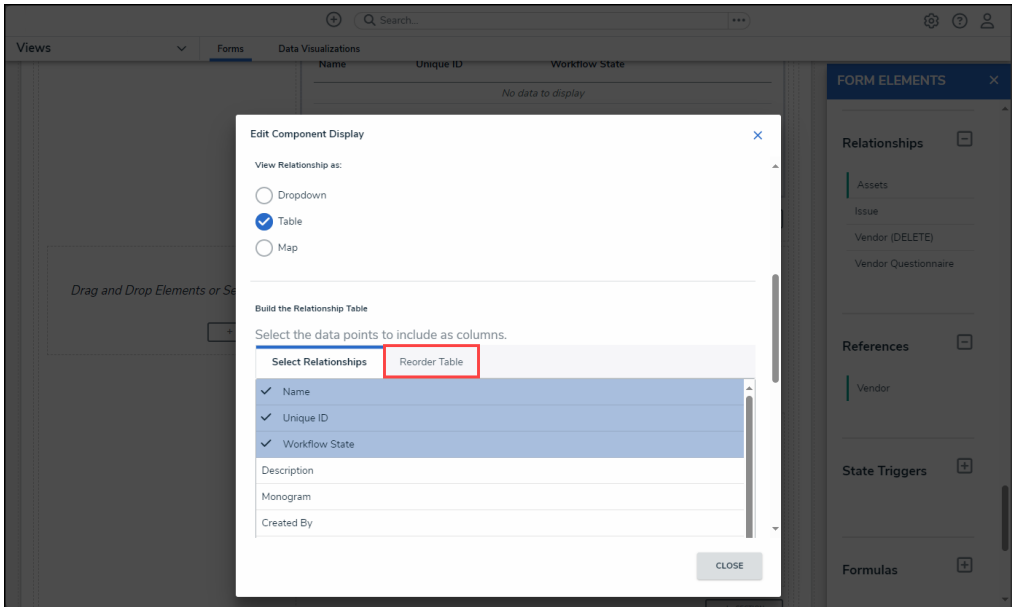

Reorder Table Tab

- **Display:** The Display section will appear when selecting the Table option.

  - **Display colored cells:** Displays formula and select list cells as text with a background color.
  - **Display colored ovals:** Displays formula or select list cells as text with colored circles instead of a background color.
  - **Display no color:** Displays formula and select list cells as text with no background color.
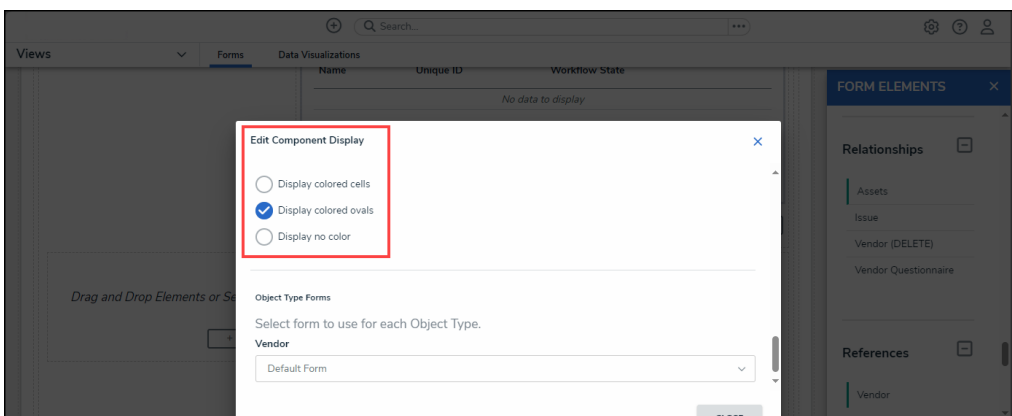
- **Map:** The Map option displays the relationship as a map. This option will display a map with pins representing any recorded locations of the relationship object or reference objects. If location data is not enabled or recorded, the map will not display any data. For more information on locations, refer to the Locations section.

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

5. The **Object Type Forms** section will appear when selecting either the **Dropdown** or **Table** options under the **View Relationship as** section. Select the form the users will complete if they create a new object through the reference from the dropdown list.
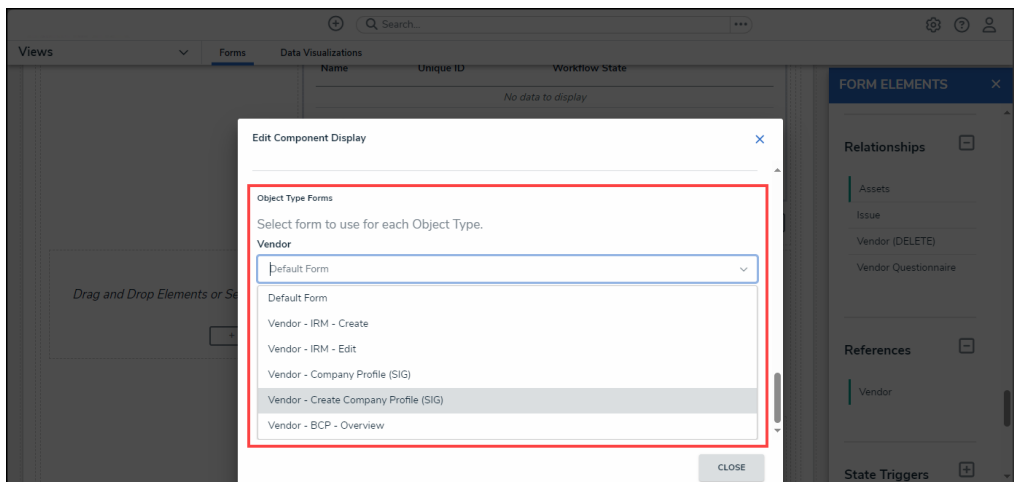
Object Type Forms Dropdown

> **Note:**
> If no configurable form(s) have been created for the relationship's object type(s), the default form will be selected automatically.

6. Click the **Close** button when finished.