

## References on Forms

The **References** standard form element indicates that the current object has been referenced on other objects through [a relationship](#). Administrators can configure how the information is displayed, as well as what end-users can do through the element. Before a reference can be added to a form, the form's object type must be added to a relationship on another object type. See [Add References to an Object Type](#) for more information.

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

## Format & Display Options

By default, references 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 reference 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 reference.
- **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 reference 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 reference.
- **Enable Unlink:** Allows end-users to remove objects from the reference on the form and unlink them from the reference 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.

The screenshot shows two table views of a reference element. The top view is the default interface, showing a table with columns: Unique ID, Name, Design Effectiveness, Operating Effectiveness, and Workflow State. The bottom view is the advanced display, showing a table with columns: Name and Workflow State. The advanced display is highlighted with a green border.

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

Start typing to find an ...

Name	Workflow State	
Issue 3	Draft	✕
Issue 1	Open	✕

ADD EXISTING ISSUES    + CREATE NEW

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





















Display options include:

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

The screenshot shows a reference dropdown menu with the text "Employee relations (union-based)" and a plus sign to the right.

A reference dropdown menu.

- **Table:** Displays the reference 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-58	Safety	
	R-31	Business Continuity	
	R-30	Tone at the Top	
	R-29	Unethical behaviour	
	R-28	Bribery & Corruption	
	R-27	Fraud	
	R-18	Local, regional, national political environment	
	R-17	Corporate Governance	
	R-16	Transparency & Financial Integrity	
	R-15	Risk Oversight	

[ADD EXISTING RISKS](#)     [+ CREATE NEW](#)



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*A reference table.*

- **Map:** Displays a map with pins representing any recorded locations of the relationship object and/or reference 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 reference on a standard form:

1. If needed, open the form you wish to add the reference element to by clicking the  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.
2. **Add** the reference element to the form, hover your cursor over the element on the canvas, then click the  icon to open the **Edit Component Display** window.

## Edit Component Display

**Header display**

Display 'Name'

Display 'Long Name'

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**Format**

Enable Search

Include Archived Data in Search Results

Enable Create

Enable Unlink

Enable Advanced This improves the search interface, as well as displaying Assessment History

**View Relationship as:**

Dropdown

Table

Map

*The Edit Component Display window.*

3. Click **Display 'Long Name'** if you want to display the long name of the originating [relationship](#) on the form. To add or edit the relationship's long name, open the **Edit Object Type** page where the original relationship was created, click the **Relationships** tab, then click the relationship to open the **Edit Relationship** palette.
4. Select one or more of the following options:
  - **Enable Search:** Allows end-users to search for existing reference 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 reference.
  - **Enable Unlink:** Allows end-users to remove objects from the reference on the form and unlink them from the reference object.
  - **Enable Advanced:** Displays the advanced user interface for the reference 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 reference.
5. To display the reference as a dropdown menu, leave **Dropdown** selected under **View Relationship as:** This option is selected by default.
6. To display the reference as a table:
  - a. Select **Table** under **View Relationship as:** then click to select the properties and fields from the reference object type that you want 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). The columns will appear on the table in the order they were selected in the **Build Relationship Table** settings.

Select the Properties and Fields to include as columns.

Name	
Description	
Unique ID	
Monogram	
Created By	
<input checked="" type="checkbox"/> Created On	
Modified By	
Modified On	
<input checked="" type="checkbox"/> Workflow State	
<input checked="" type="checkbox"/> External Reference Id	
External Data Source	<input type="button" value="FIELD"/> <input type="button" value="COMPANY"/>
Stack	<input type="button" value="FIELD"/> <input type="button" value="COMPANY"/>
Profile Photo	<input type="button" value="FIELD"/> <input type="button" value="COMPANY"/>
<input checked="" type="checkbox"/> Business Unit	<input type="button" value="RELATIONSHIP"/> <input type="button" value="COMPANY"/>

Display colored cells as ovals

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



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.

- b. **Optional:** Select the **Display colored cells as ovals** checkbox to show formula or select list cells as text with colored circles instead of full background color. When this option is not selected, cells are displayed with text and full background color, if any.
7. To display the reference as a map, select **Map** under **View Relationship as**: Selecting this option will display a map with pins representing any recorded locations of the relationship object and/or reference 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 the users will complete if they're creating a new object through the reference.

## Object Type Forms

Select creation form to use for each Object Type.

### Incident

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



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

9. Click **Close** when finished.