

Adding Form Elements to a Standard Form

Last Modified on 11/22/2024 2:18 pm EST

Overview

Elements (e.g., fields, relationships, formulas.) can be added to forms in Resolver.

When creating forms for use in a repeatable form, only forms with supported elements will be displayed. See the [Add Repeatable Forms to a Report](#) article for a list of unsupported elements.



Note:

Fields, relationships, references, formulas, and/or roles can only be added to a form after they've been added to the [object type](#) as components.

User Account Requirements

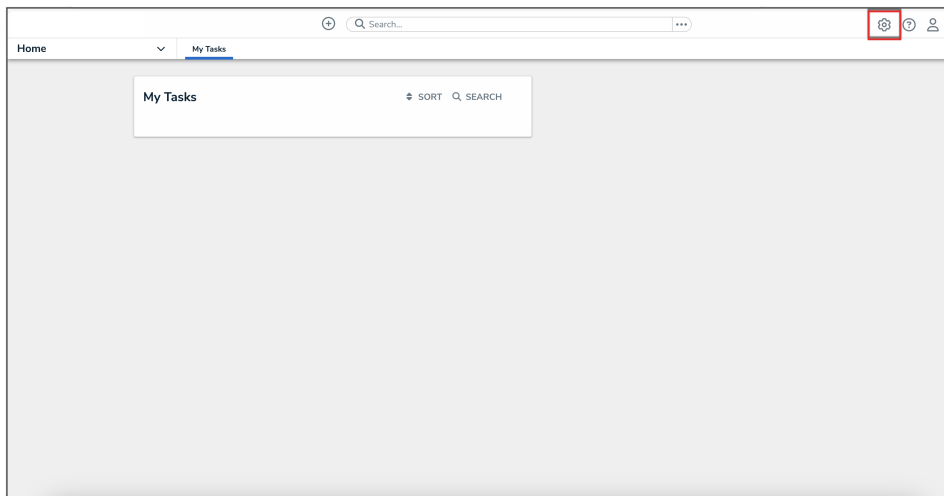
The user must have Administrator permissions to access the **Views** section on the **Admin Overview** screen.

Related Information/Setup

For more information about Standard Forms, read the [Standard Forms Overview](#) article.

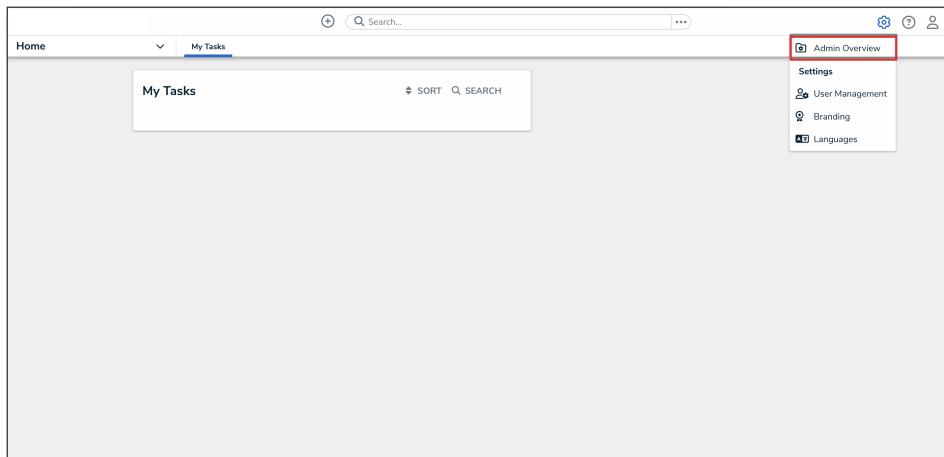
Navigation

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



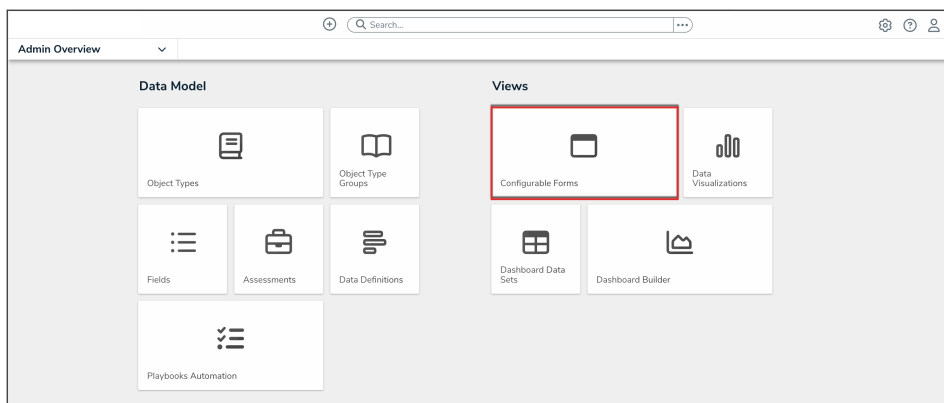
Administration Icon

- From the Administrator settings menu, click **Admin Overview**.



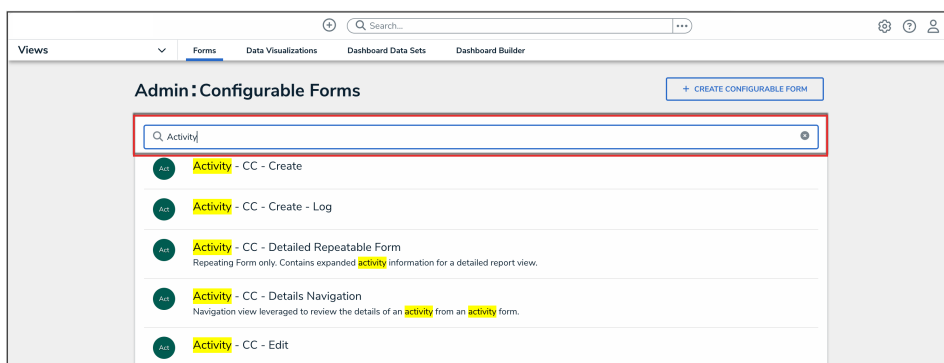
Administrator Settings Menu

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



Configurable Forms Tile

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

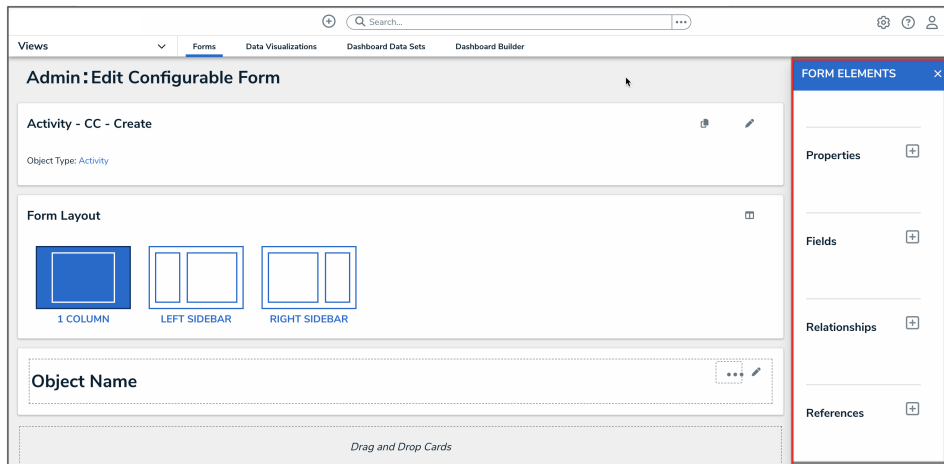


Search Field

- Click the form that you want to edit.

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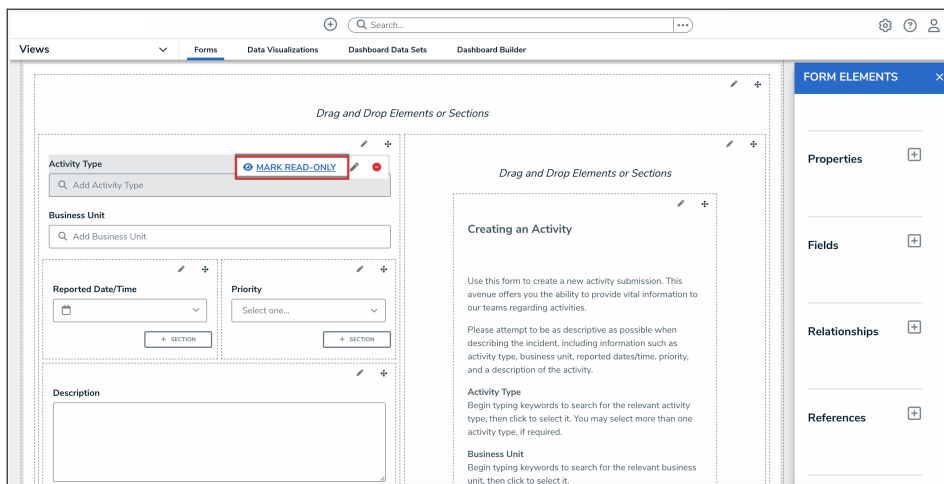
1. From the **Form Elements** palette, drag and drop an element from the list on to a form card and/or section.



Form Elements Palette

Note: Elements already added to the canvas will appear in the palette with green to the left of their names.

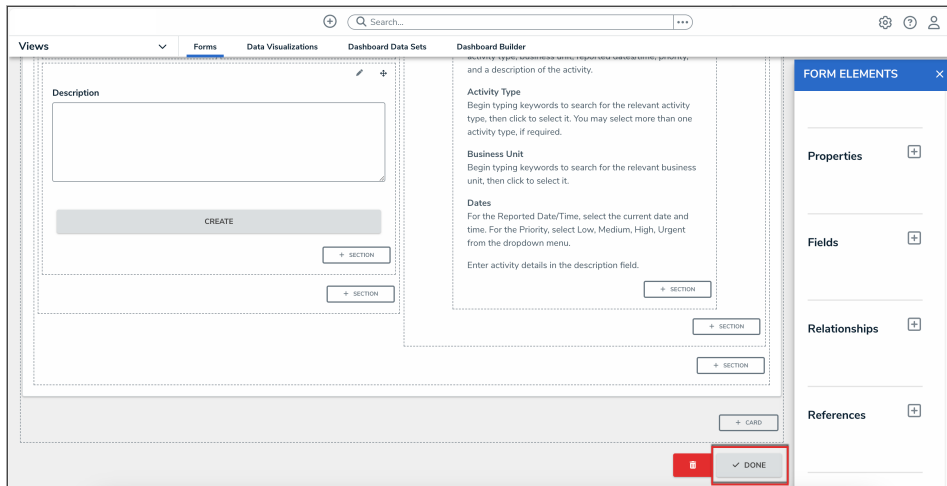
2. To mark an element as read-only, hover your cursor over the element in the canvas, then click the **Mark Read-Only** button.



Mark Read-Only Button

To make an element editable again, hover your cursor over the element and click the **Remove Read-Only** button.

3. Click the **Done** button to save your changes.



Done Button