

## **Adding Form Elements to a Standard Form**

Last Modified on 02/19/2025 10:16 am 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.

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**

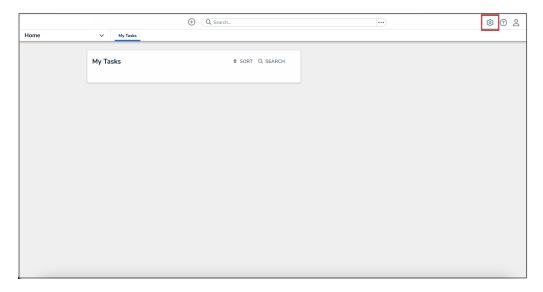
The user must have Administrator permissions to access the **Views** section on the **Admin Overview** screen.

#### **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

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



		G Search			0	2
Home	✓ My Tasks				Admin Overview	
					Settings	
	My Tasks	\$ SOR	RT Q SEARCH		😂 User Management	
					<b>Q</b> Branding	
					Languages	

Administrator Settings Menu

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

		(	• Q Search			)	\$ ? <u>\$</u>
Admin Overview	~						
	Data Model			Views			
	Object Types	]	Object Type Groups	Configurable Forms		<b>DOD</b> Data Visualizations	
	Fields	Assessments	Data Definitions	Dashboard Data Sets	Lashboard Builder	<u>۲</u>	
	Playbooks Automation						

Configurable Forms Tile

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

				\$ ® \$			
Views	~	Forms Data Visualizations Dashboard Data Sets Dashboard Builder					
	Admi	n:Configurable Forms	+ CREATE CONFIGURABLE FORM				
	Q Act	vity	٥				
	Activity - CC - Create						
	Activity - CC - Create - Log      Activity - CC - Detailed Repeatable Form     Repeating Form only. Contains expanded activity information for a detailed report view.						
	Act	Activity - CC - Details Navigation Navigation view leveraged to review the details of an <mark>activity</mark> from an <mark>activity</mark> form.					
	Act	Activity - CC - Edit					

Search Field



5. Click the form that you want to edit.

### Adding Form Elements to a Standard Form

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

Views	✓ Forms Data Visualizations	
	Ý †	FORM ELEMENTS ×
	Vendor Assessment Name	Total Contract Amount
		Type of Cloud Hosting
	/ + / +	Type of Service
	Vendor Due Date	Type of Software Being Provided
	Q. Add Vendor	URL/URI
	Vendor Contact Vendor Contact's Email	Vendor Contact's Email
	Q. Add Vendor Contact	Vendor Contact's Phone Number
	+ SECTION Job Title	Vulnerability and Threat Management
	+ SECTION	What is the name of the Exchange?
	Contact Information	What is the Trading Symbol?
		Years in Business
		Relationships +
	Names, titles, and functions of individuals who contributed to the questionnaire	
	Location	

Dragging Element from the Form Elements Section



Views	✓ Forms Data Visualiz	ations	
			FORM ELEMENTS
	Vendor Assessment Name		Total Contract Amount
			Type of Cloud Hosting
	/ ÷		Type of Service
	Vendor	Due Date	Type of Software Being Provided
	Q Add Vendor	Ŭ ~	URL/URI
	Vendor Contact	Vendor Contact's Email	Vendor Contact's Email
	Q Add Vendor Contact		Vendor Contact's Phone Number
	Vendor Contact's Phone Number	Job Title	Vulnerability and Threat Management
	+ SECTION	+ SECTION	What is the name of the Exchange?
	Contact Information	▶ ⊕	What is the Trading Symbol?
			Years in Business
		6	Relationships 🕂
	Names, titles, and functions of individuals w	/ho contributed to the questionnaire	

Dropping Element onto Form Card/Section

2. Elements already added to the canvas will have a green line next to their names.

€ Q Search	••	• \$ \$ \$
Views V Forms Data Visualizations		
Admin: Edit Configurable Form		FORM ELEMENTS
01. Vendor Assessment - Vendor Team - Approved	1	Fields 📃
The approved form allows the vendor team to review approved vendors. They can review all of the vendor's responses, is ratings.	ssues, and risk	Additional Location Address
Object Type: Vendor Assessment		Additional Locations Application or Service
Form Layout		Application Security Policy
		Approval Required Archived Date
		Backup Location Business Address
1 COLUMN LEFT SIDEBAR RIGHT SIDEBAR		Business Resiliency
		Certification of Encryption Algorithm
Approved Vendor Engagement	/	Change Control Policy/Proecdures

Element Added Indicator

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



	( Q. Search.		•••	\$ ® \$
Views	∽ 🛛 🗸 🗸 🗸 🗸 Visualiz	ations		
		/	<b></b>	FORM ELEMENTS ×
	Drag and Drop El	ements or Sections		
	Vendor Assessment Name	φ.		Properties +
	*	* +		
	Ver MARK READ-ONLY P O	Due Date		Fields 📃
	Vendor Contact	Vendor Contact's Email		Additional Location Address
	Q Add Vendor Contact			Additional Locations
	Vendor Contact's Phone Number	Job Title		Application or Service
				Application Security Policy
	+ SECTION	+ SECTION		Approval Required
				Archived Date
	Contact Information			Backup Location
				Business Address
				Business Resiliency
				Certification of Encryption Algorithm

Mark Read-Only Button

- To make an element editable again, hover your cursor over the element and click the Remove Read-Only button.
- 5. Click the **Done** button to save your changes.

	$(\div)$	Q Search		•••	(\$)	?	Do
Views	Forms	Data Visualizations					
		P +	P +		FORM ELEMENTS	;	×
Review the status reports a proper states.	bove to ensure th	at all relevant records are in the	REASSESS VENDOR		Properties	+	Î
			+ SECTION				
Archive Management			÷		Fields	-	
· · · · · · · · · · · · · · · · · · ·			+ SECTION		Additional Location Address		
					Additional Location	s	
			+ SECTION		Application or Serv	ice	
					Application Security Policy	′	
			+ CARD		Approval Required		
					Archived Date		
					Backup Location		
					Business Address		-

Done Button