

# Configure a Standard Form Header

Last Modified on 06/13/2024 11:37 am EDT

## Overview

Administrators can configure the following form's header settings:

- Display a **Custom Name** and a **Custom Description**.
- Allow end-users to edit the **Name** or **Description** properties (provided the appropriate [Edit permissions](#) are enabled and the header is not marked as read-only).
- Show the object's **Unique ID** in the header.

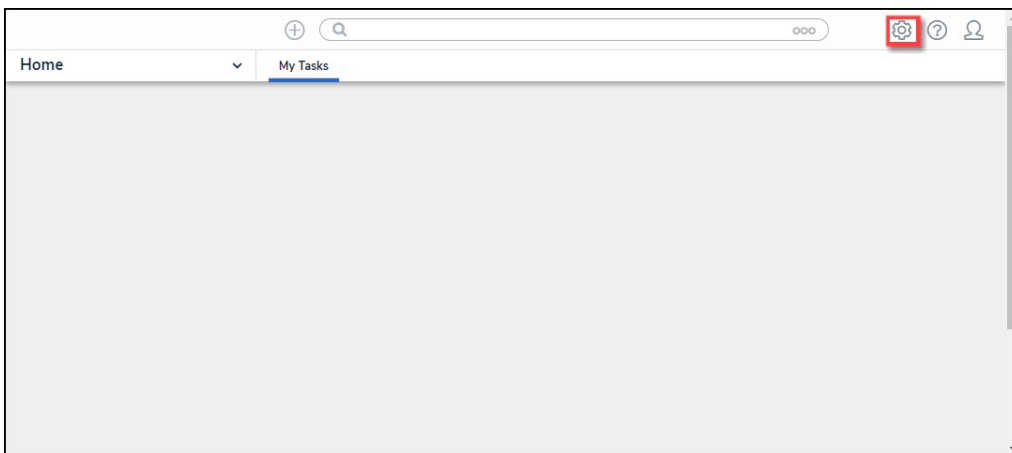
## Related Information/Setup

For more information on Form Headers see the [Forms Header Overview](#) article.

- [Forms Header Overview](#)

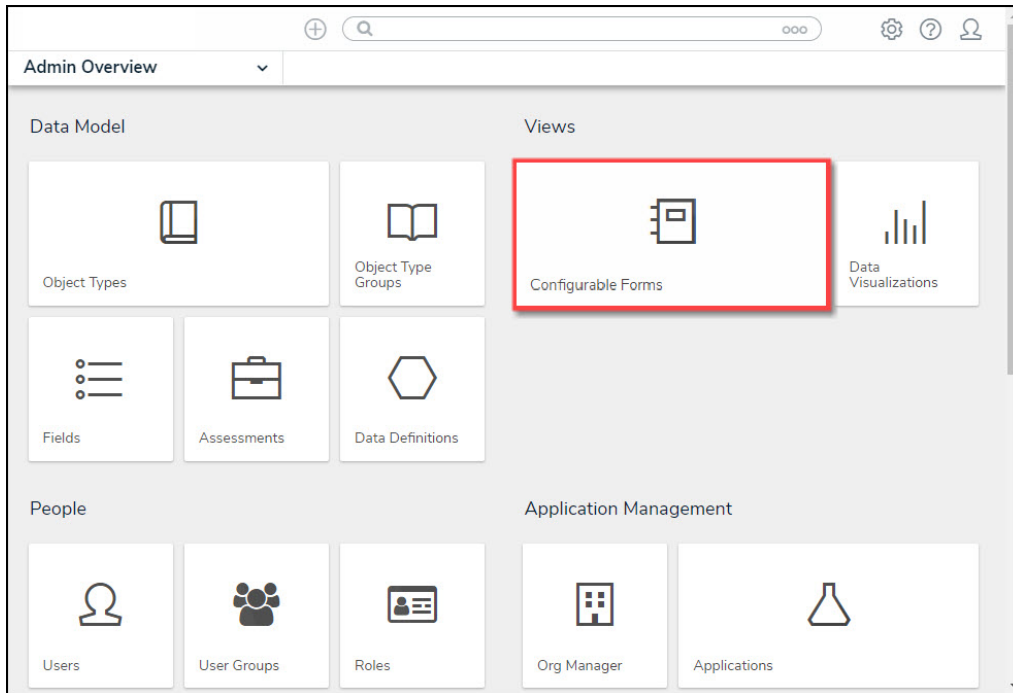
## Navigation

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



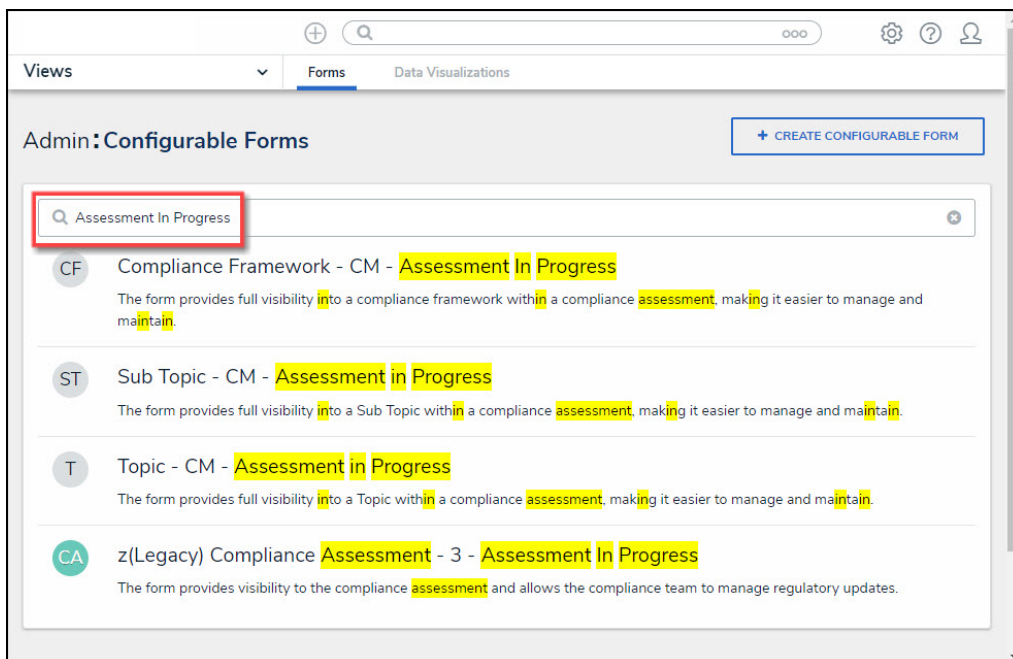
*Administration Icon*

2. From the **Admin Overview** screen, click the **Configurable Forms** tile on the **Views** section.



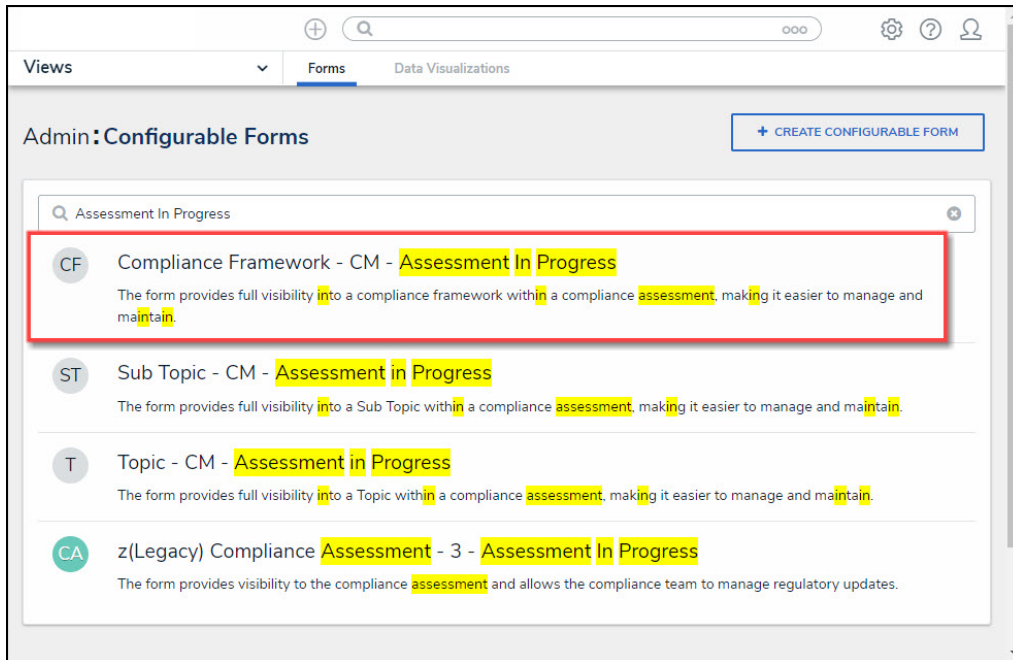
*Object Types Tile*

3. From the **Admin: Configurable Forms** screen, enter a keyword in the **Search** field to narrow down the forms list.



*Search Field*

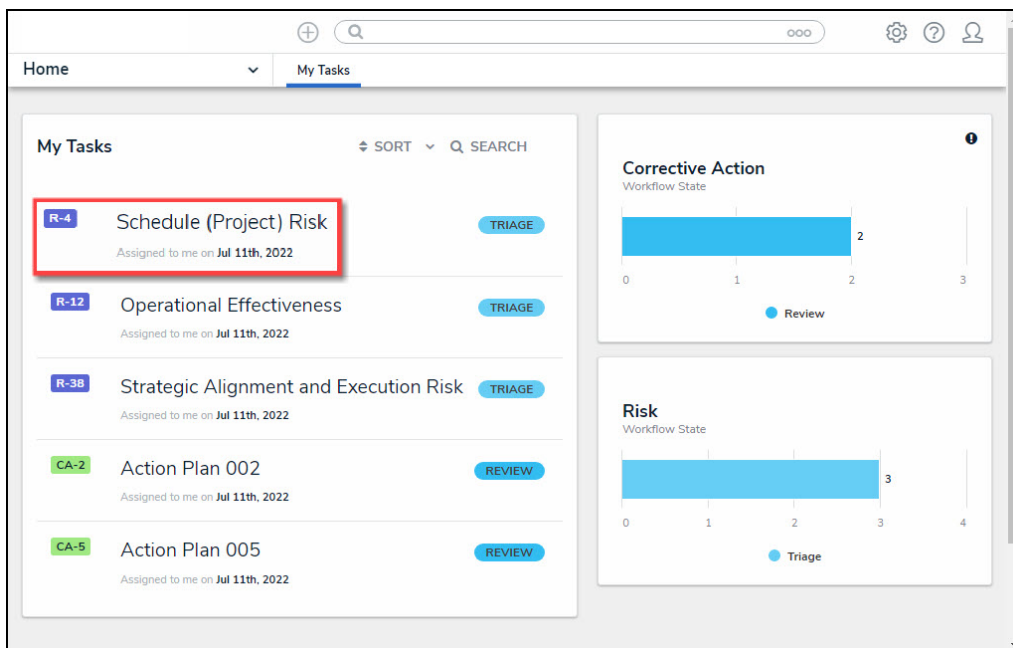
4. Click on the **Name** of the form you want to configure.



*Select a Form Name*

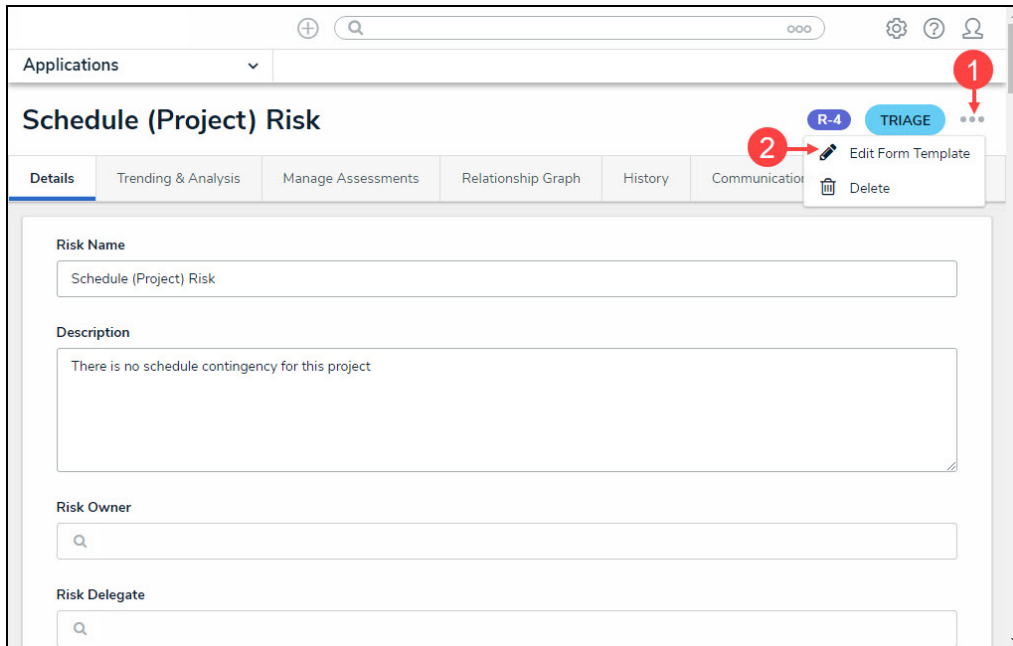
## Alternate Navigation

1. From the **Home** screen, select a **Task** from the **My Tasks** list.



*My Tasks List*

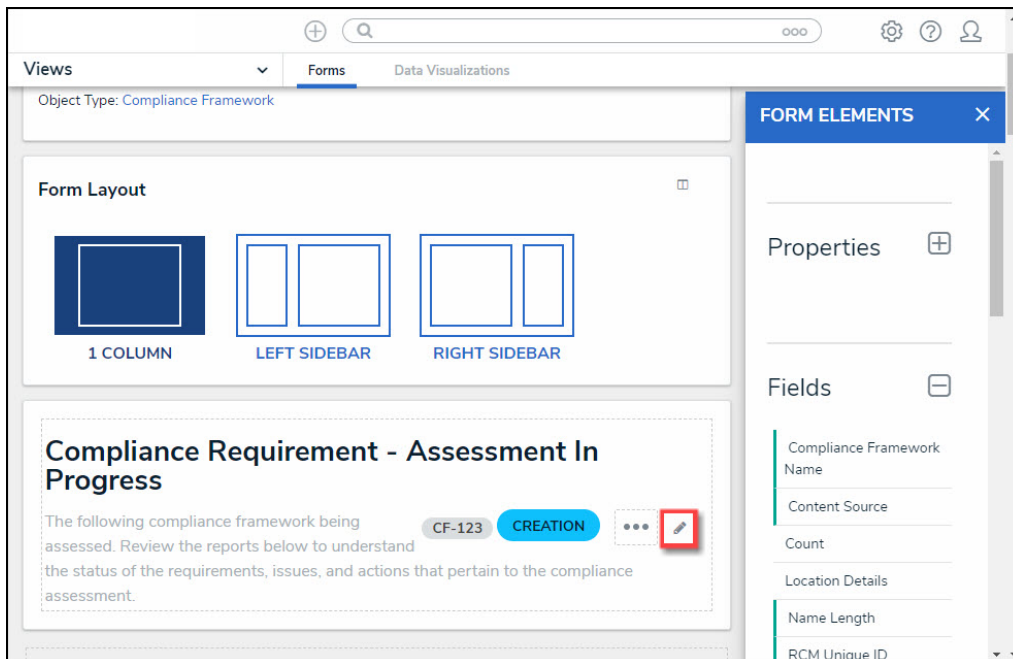
2. From the **Form** screen, click the **Options** icon and select **Edit Form Template** from the drop-down list.



*Options Icon*

## Configure a Standard Form Header

1. From the **Admin: Edit Configurable Forms** screen, click the **Edit** icon on the **Form Header** section.

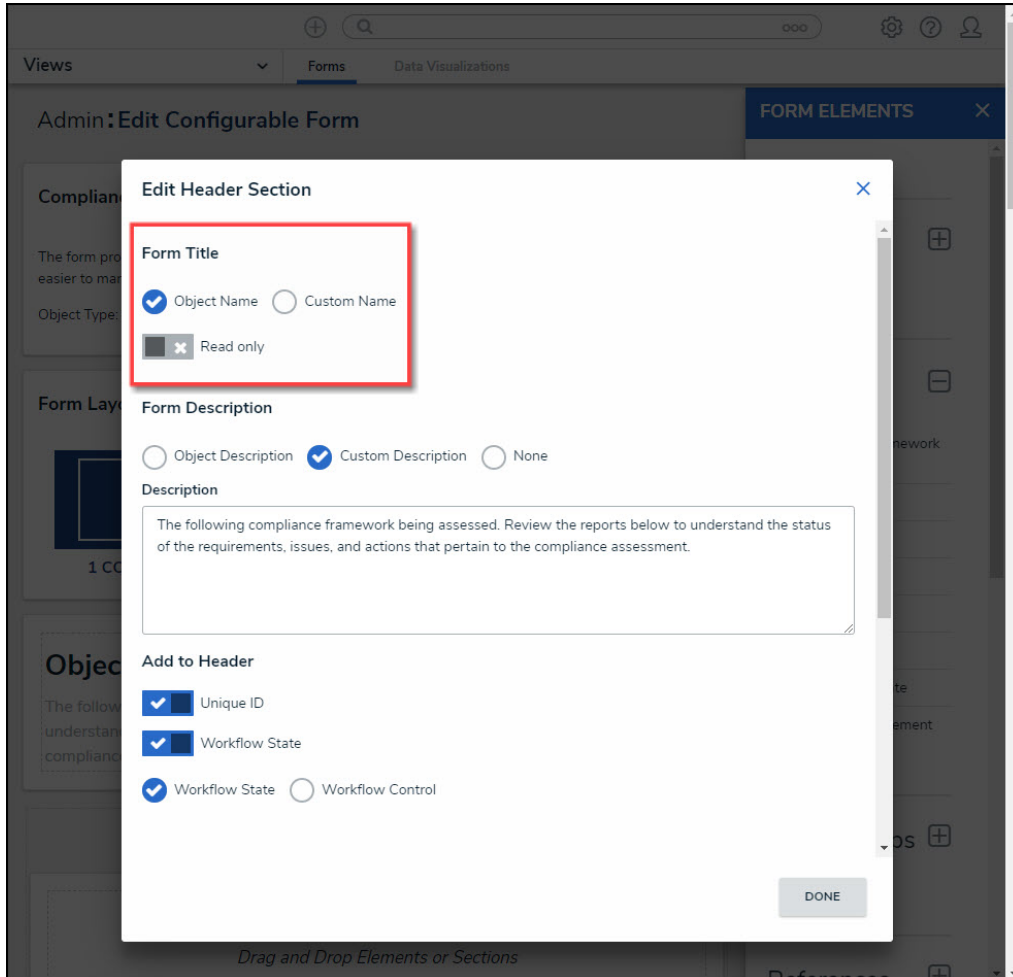


*Edit Icon*

2. From the **Edit Header** pop-up, select a **Form Title** radio button:
  - **Object Name:** The Object's Name property value.
    - **(Optional) Read only:** The **Read only** toggle switch will appear when the **Object**

**Name** radio button is selected. The toggle marks the form title as read-only, preventing users with **Edit** permissions enabled from modifying the title.

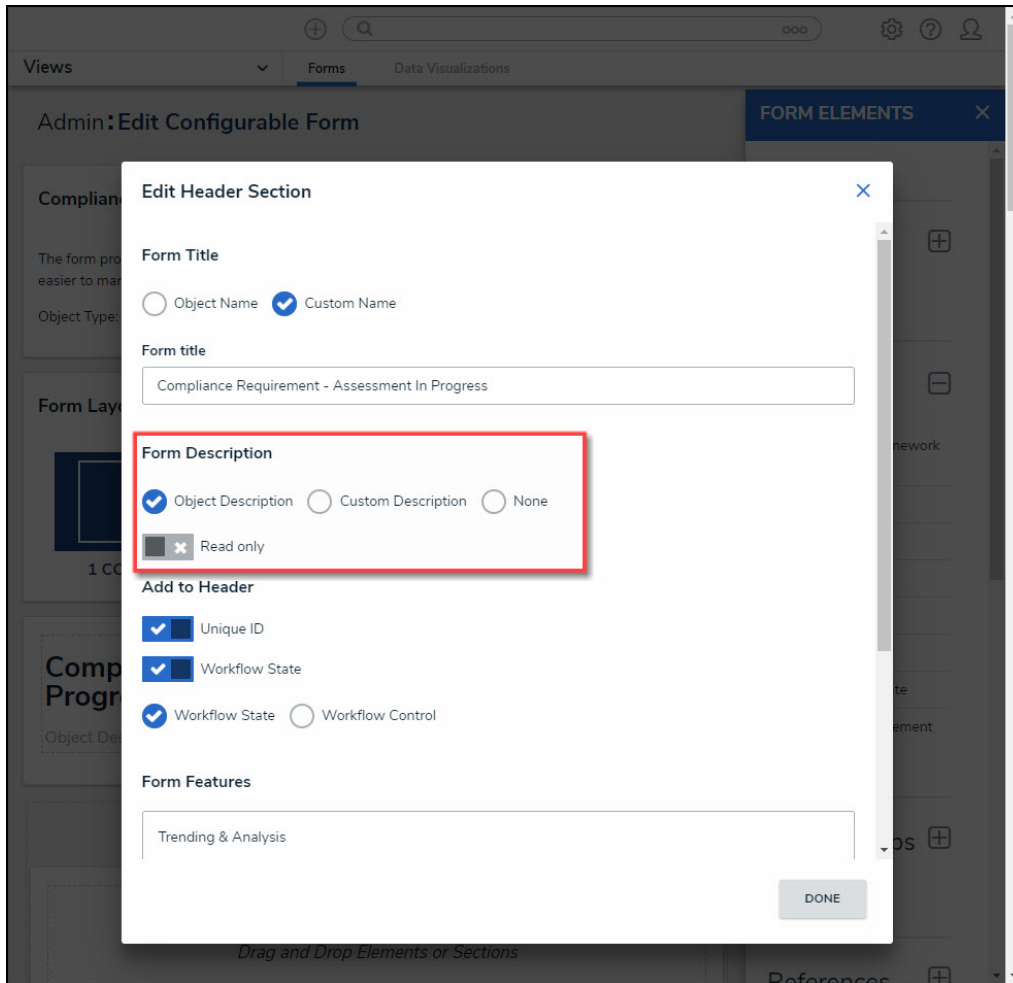
- **Custom Name:** The Object's name-value pulls from the **Form Title** field, which appears below the **Custom Name** radio button.



### *Form Features Section*

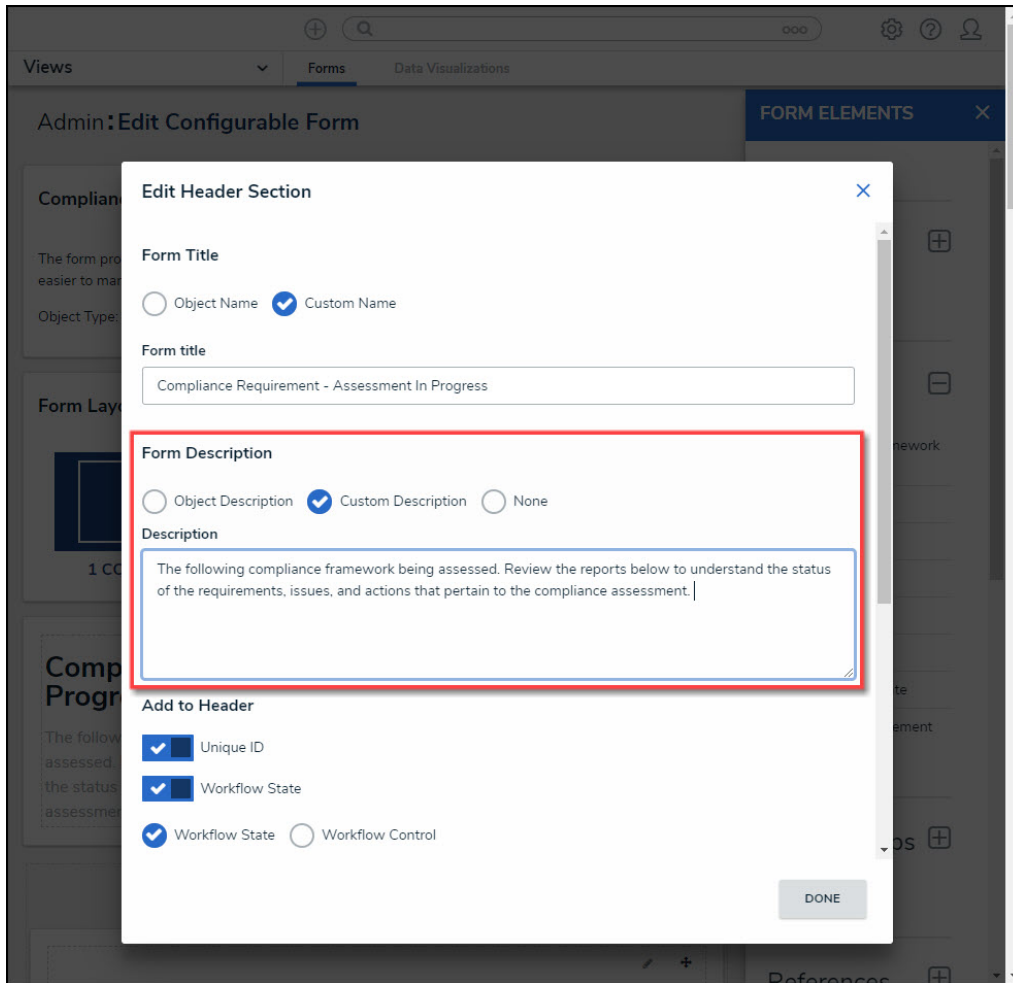
3. Select a **Form Description** radio button:

- **Object Description:** Uses the form subtitle as the Object's description.
  - **(Optional) Read only:** The **Read only** toggle switch will appear when the **Object Description** radio button is selected. The toggle marks the description as read-only, preventing users with **Edit** permissions enabled from modifying the title.



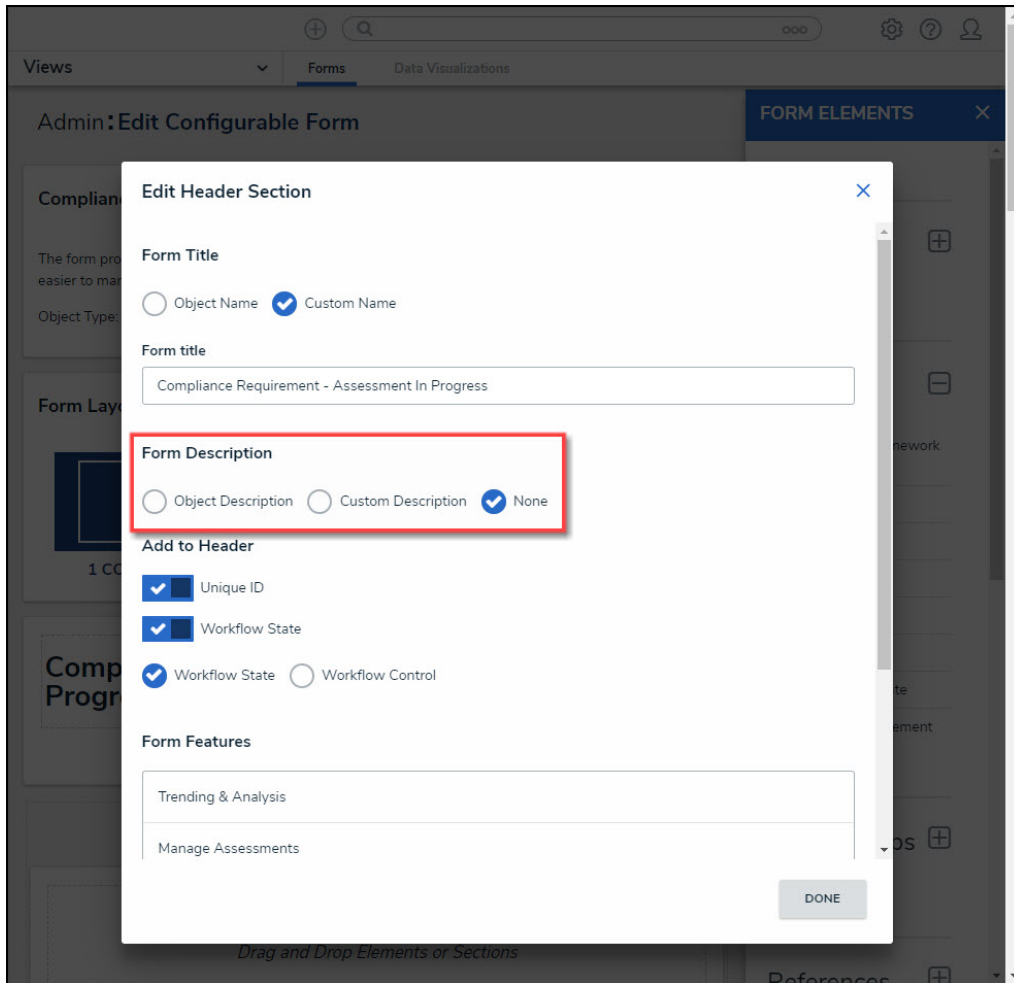
*Form Description = Object Description*

- **Custom Description:** Uses the subtitle assigned to all Objects created through the form. End-users cannot edit this option.
  - **Description:** The **Description** field will appear when the **Custom Description** radio button is selected. The **Description** field will display the Custom Description.



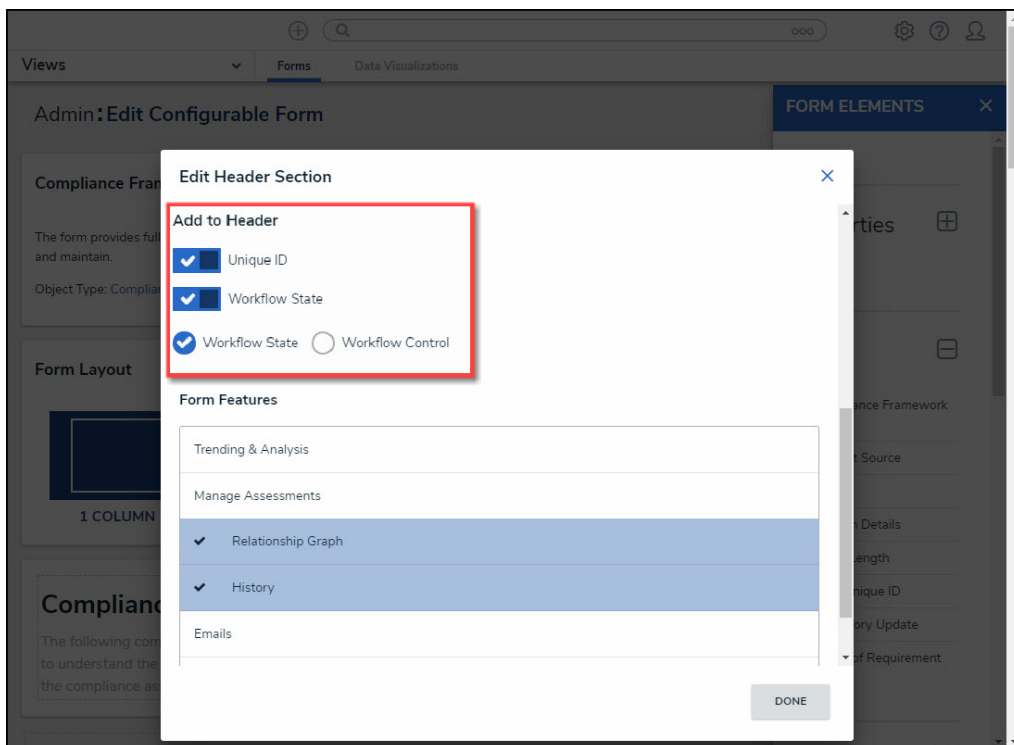
*Form Description = Custom Description*

- **None:** No subtitle appears on the form.



*Form Description = None*

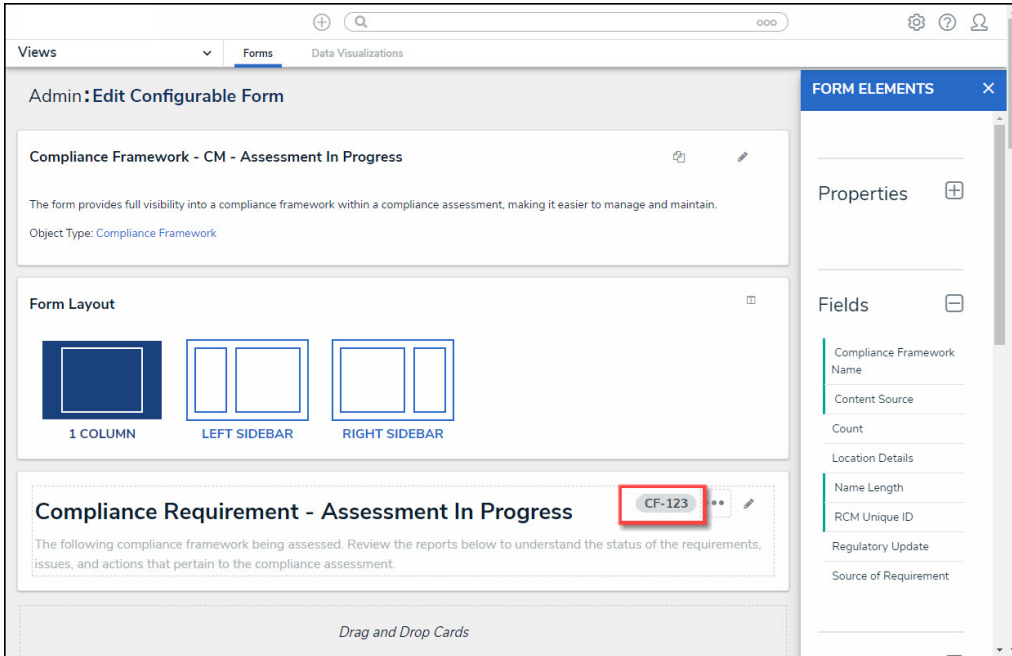
4. Select **Add Header** options:





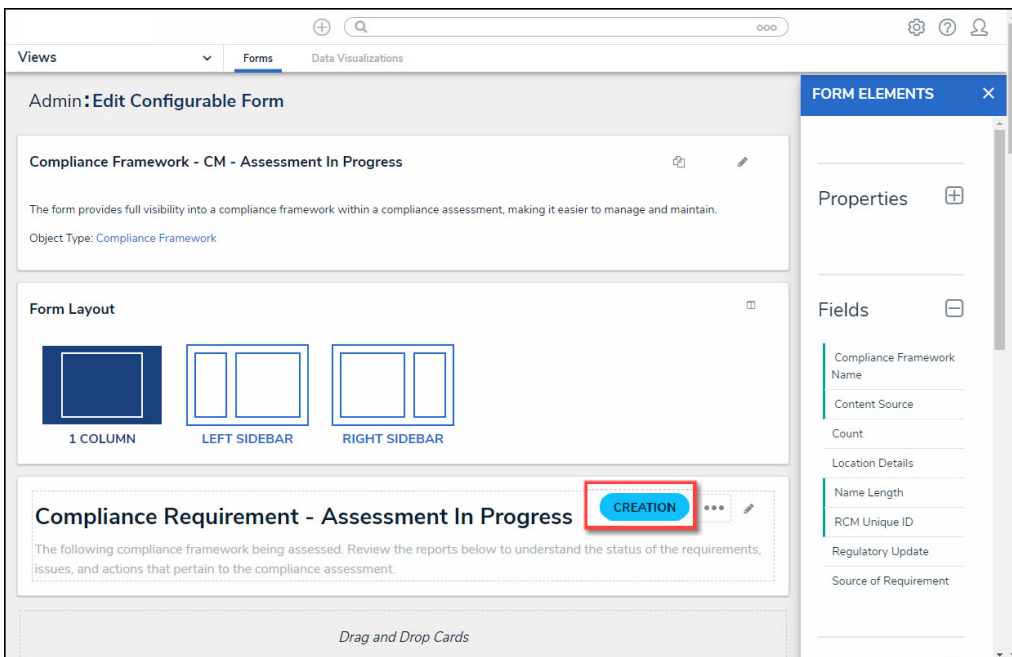
*Add Header Options*

- **Unique ID:** Includes the Object Type's Unique ID on the Form Header. The Unique ID is a unique identifier automatically assigned to the Object Type at creation.



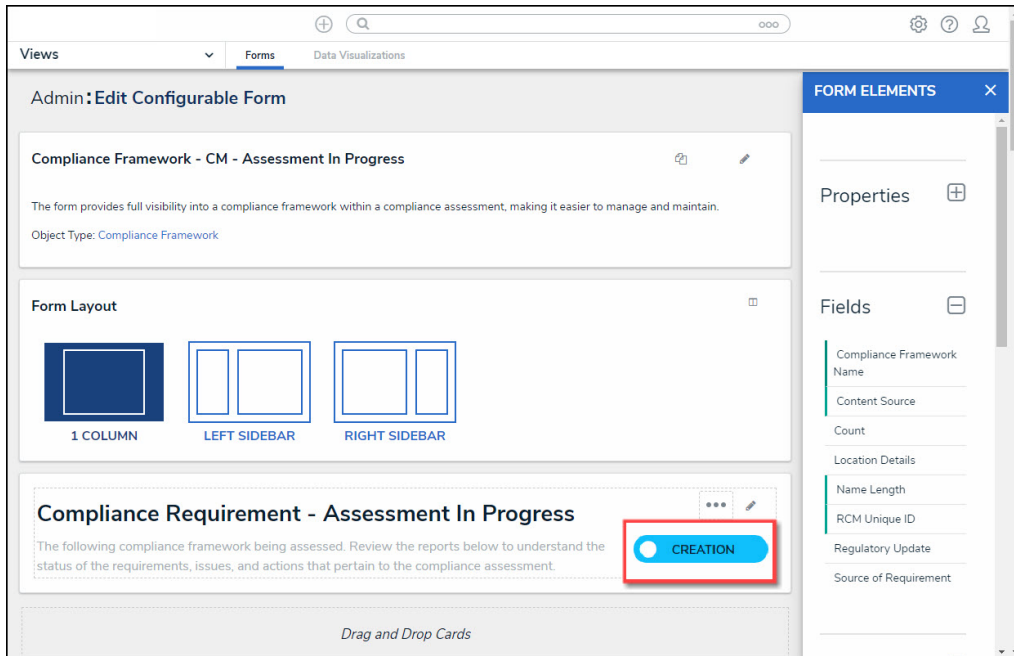
*Unique ID Enabled*

- **Workflow State:**
  - **Workflow State (Radio Button):** Includes the Object Type's current state on the Form Header.



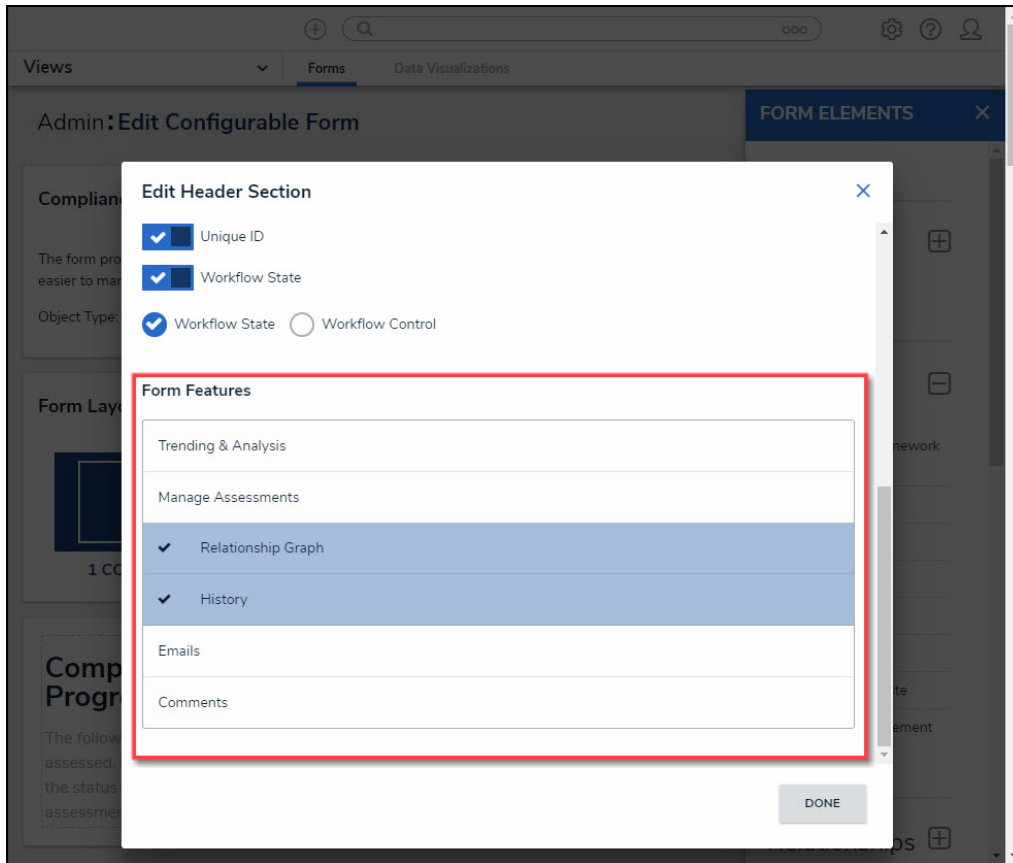
*Workflow State Enabled*

- **Workflow Control (Radio Button):** Includes the Object Type's current state and triggers on the Form Header. You can separate workflow triggers from other Action buttons within the form. Clicking the Workflow Control allows you to create a customized list of triggers available to an object's current workflow. See the [Enable Workflow Control on a Form](#) article for more information on Workflow Controls.



*Workflow Control Enabled*

5. **(Optional)** Select **Form Features** by clicking on the **Form Feature Name**. A checkmark next to the **Form Feature** indicates that the **Form Feature** is active. **Form Features** modify the available options when viewing a form.
  - **Trending & Analysis:** The **Trending & Analysis** tab shows Assessment Results.
  - **Manage Assessments:** The **Manage Assessments** tab allows you to push object updates syncing the assessment with the library.
  - **Relationship Graph:** The **Relationship Graph** tab shows how that Object is connected to other Objects.
  - **History:** The **History** tab tracks all form changes and lists the details.
  - **Emails:** The **Communication** tab is where the email information will appear and tracks all form email correspondence.
  - **Comments:** The **Communication** tab is where the comment information will appear and tracks all form comments.



*Form Features Section*

6. **(Optional)** From the **Assessment Results Table** select list, you can add formulas to be listed as tables, such as:
  - **Residual Risk Score:** Residual Risk Score measures the remaining risk after considering the effects of the controls.
  - **Control Effectiveness:** Control Effectiveness measures effectiveness of the controls used to mitigate a risk.
  - **Inherent Risk Score:** Inherent Risk Score measure a risk in the absences of controls.
7. Click the **Done** button to save your changes.