

Form Actions Overview

The **Actions** element allows end-users to open a specified form or data visualization (including [Data Analytics Export reports](#)) by clicking a button on a standard form.

This element type is useful when the user needs to complete or print related forms throughout a process, they would benefit from being able to view report data while working in an object, or they need a summary of object data for further analysis.

Form actions include:

- **Open a form:** Opens a standard form related to the object type.
- **Open a data visualization:** Opens a [report](#) or [data grid](#) related to the object type.
- **Export Data:** Opens a [report](#) that allows users to export object data from the form's object type.
- **Open Assessment Scoping:** Opens a [navigation form](#) that allows users to view, filter, and add focus objects to an assessment.

Because each form action requires data from the originating object, actions should only be added to forms for **existing** objects. Clicking an action button on a form still in the **Creation** state will display blank, read-only forms or reports with no data. If the **Open Assessment Scoping** action is added to a standard form for a new assessment, it will not be displayed until the assessment has been created.

The screenshot displays the 'Edit Configurable Form' page. The main form area shows a header 'Object Name' with a sub-header 'SPA-123'. Below this is a section titled 'SOX Assessment Status' with a blue bar labeled 'Creation'. The form includes fields for 'SOX Process Assessment Name', 'Business Unit' (with a search input), and 'Time'. A '+ SECTION' button is visible at the bottom. On the right, the 'FORM ELEMENTS' panel is open, showing a list of actions: 'Roles', 'Actions', 'Open a data visualization', 'Export Data', 'Open a form', 'Open Assessment Scoping', and 'Other'. The 'Open a data visualization', 'Export Data', and 'Open a form' items are highlighted with a green border. At the bottom of the panel, there is a checkbox for 'Enable Comments'.

The Actions element on the Edit Configurable Form page.