

Form Actions Overview

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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.
- **Open Assessment Rescoping:** Opens a [navigation form](#) that allows users to add additional objects to a previously launched 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 a drag-and-drop interface for configuring a form. The main workspace, titled "Drag and Drop Cards", contains a form with several sections. The first section includes "Vendor Assessment Name" and "Third Party Company/Business Name" text inputs. The second section is "Criticality" with a dropdown menu. The third section is split into two columns: "Assessee" with a search input and "Job Title" with a text input; "Due Date" with a date picker and "Date of Response" with another date picker. Each section has a "+ SECTION" button. To the right, a "FORM ELEMENTS" sidebar is open, showing categories: "Roles", "Actions", and "Other". The "Actions" category is expanded, listing: "Export Data", "Open a data visualization", "Open a form", "Open Assessment Rescoping", and "Open Assessment Scoping".

The Actions element on the Edit Configurable Form page.