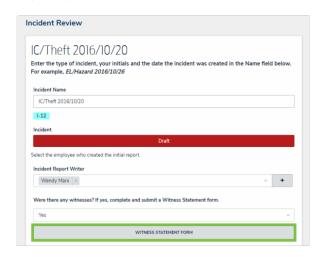
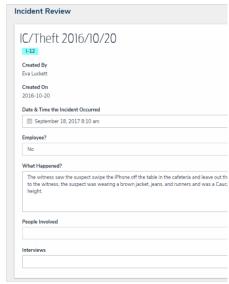


Open a Form Action

Last Modified on 04/19/2022 11:21 am EDT

The **Open a Form** action allows end users to open a related standard form from within an existing object. For example, if the Open a Form action was added to a form for the Incident object type, a user viewing an existing incident object could click the "Witness Statement Form" action button to view, complete, or print the Incident Witness Statement form, then click Done to return to the originating object.





Clicking on a form action button on an existing object will open a related form. In this case, clicking the Witness Statement Form button will open the Statement form.

To add the Open a Form action to a standard form:

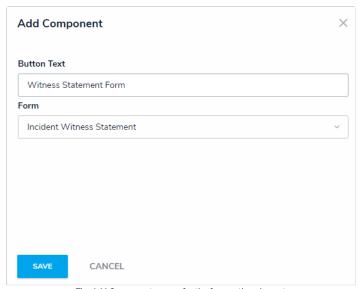
- If the form is not already open, click the icon in the top bar > Configurable Forms in the Views section, then select a form.
- 2. Click the \prod icon in the **Actions** section of the **Form Elements** palette to expand it.
- Drag and drop the Open a Form element to the canvas, which will automatically display the Add Component screen.



The **Open a Form** action should only be added to standard forms for existing object types. Read more here: Form Actions Overview.

- 4. Enter text to display on the clickable button in the **Button Text** field.
- 5. Select a form from the **Form** dropdown menu. You can only select forms related to the current configurable form's object type.





The Add Component screen for the form action element.

- 6. Click **Save** to return to the canvas.
- 7. To edit the action, hover your cursor over the element on the canvas, then click the icon.