Navigation Form Overview

Last Modified on 10/09/2020 11:52 am EDT

A **navigation form** is a configurable form type that uses a data definition to provide visual context for users working with objects or assessments. This form type makes it easier to understand how each object relates to one another while providing easy access to those objects without leaving the current form.
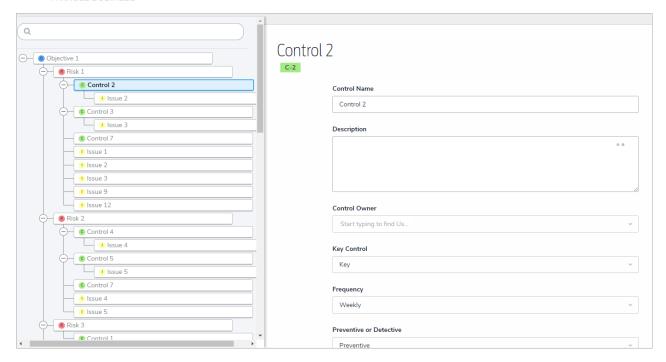
Whereas a standard form merely contains the elements and fields added by an administrator, objects in a navigation form are represented as a hierarchical tree with expandable nodes in a panel to the left, starting with the object from the anchor object type and moving down the data path. Clicking one of these objects will display a standard form or data visualization to the right of the tree, without leaving the navigation form.

Navigation forms are available to end-users through a view, through the link emailed to a user through the Messaging action in a workflow, or when clicking an object on the My Tasks page. These forms are also used to scope and launch assessments. See the Scope & Launch section for more information.

Important Notes

- Data grids are not supported in nav forms.
- It's recommended that repeatable form reports are not added to nav forms as doing so may cause performance issues, depending on the amount of data displayed in the form or report.
- If you do not select a specific form or report to display, any form selected in the object type's workflow permissions for its current state will display by default.
- If a user doesn't have permission to view a specific object, that object and any others below it in the tree will not be visible. Users can narrow down which objects are displayed in the tree by using the search field in the left panel.

A navigation form as it appears to users in a view.