

Create a Navigation Form

Last Modified on 09/17/2025 9:40 am EDT

Overview

A navigation form is a configurable form that provides visual context for objects and assessments and helps users understand how each object relates to one another.



Note:

Data grids are not currently supported in navigation forms.

User Account Requirements

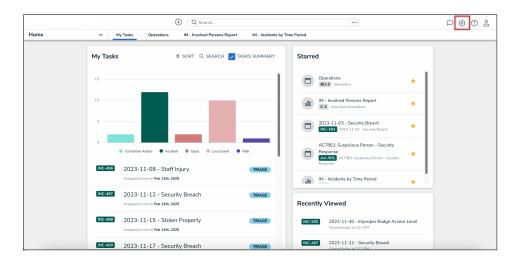
The user must have Administrator permissions in order to access the *Admin Overview* section.

Related Information/Setup

Please refer to the Navigation Form Overview article for more information on using navigation forms.

Navigation

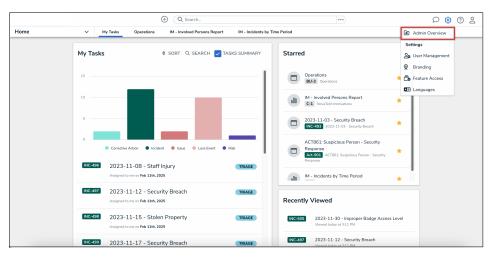
1. From the *Home* screen, click the **Administration** icon.



Administration Icon

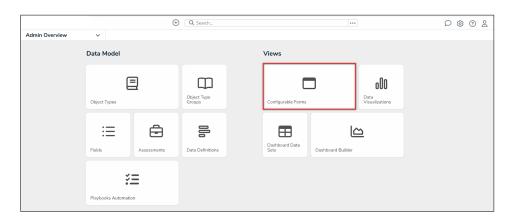
2. From the Administrator settings menu, click the Admin Overview link.





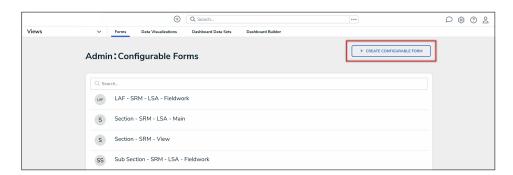
Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Configurable Forms** tile under the **Views** section.



Configurable Forms Tile

4. From the *Admin: Configurable Forms* screen, click the **Create Configurable Form** button.

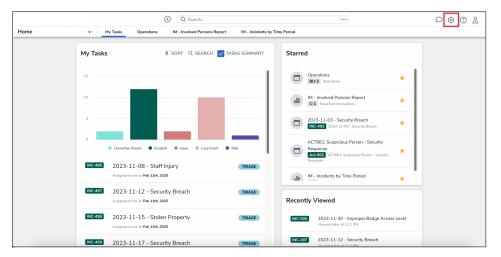


Create Configurable Form Button

Alternate Navigation

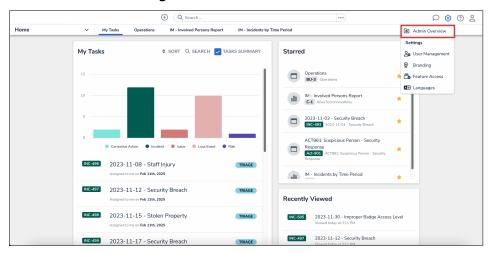
1. From the *Home* screen, click the **Administration** icon.





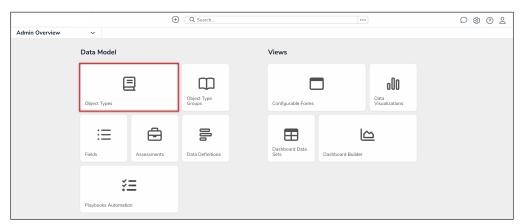
Administration Icon

2. From the **Administrator settings** menu, click the **Admin Overview** link.



Administrator Settings Menu

3. To create a form from an object type, from the *Admin Overview* screen, click the **Object**Types tile in the **Data Model** section.



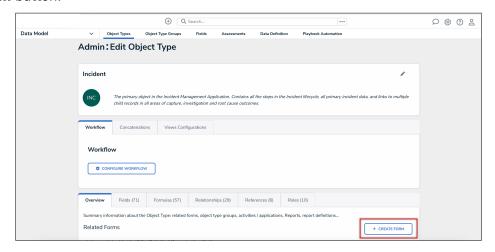
Object Types Tile

a. On the Admin: Object Types screen, from the list of object types, click the object



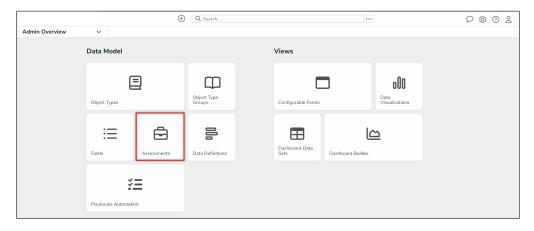
type that you want to create a form from.

b. On the *Admin: Edit Object Type* screen, from the **Overview** tab, click the **Create**Form button.



Create Form Button

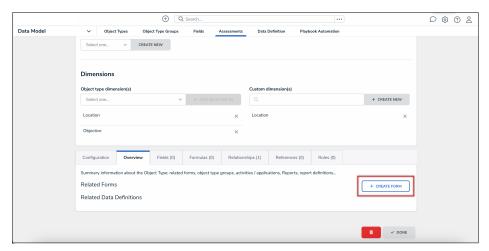
4. To create a form from an assessment, from the *Admin Overview* screen, click the **Assessments** tile in the **Data Model** section.



Assessments Tile

- a. On the *Admin: Assessments* screen, from the list of assessments, click the assessment that you want to create a form from.
- b. On the *Admin: Edit Assessment* screen, from the **Overview** tab, click the **Create**Form button.

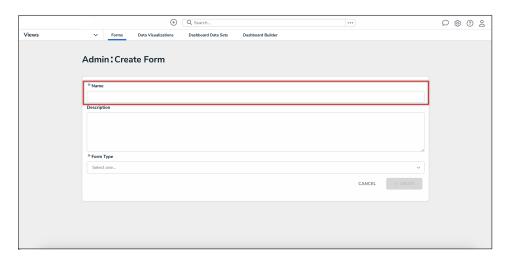




Create Form Button

Creating a New Navigation Form

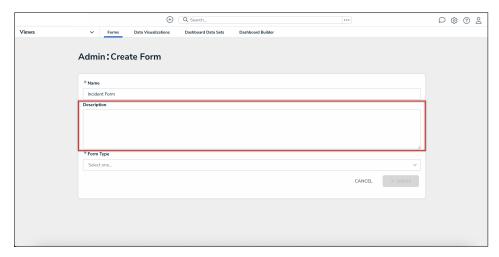
1. From the *Admin: Create Form* screen, enter the name of the form in the **Name** field.



Name Field

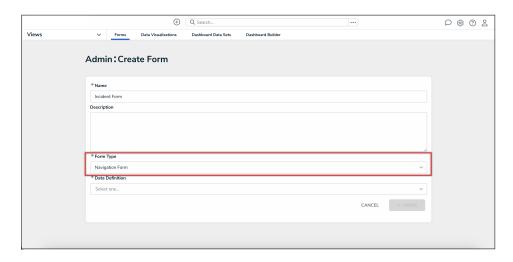
2. **(Optional):** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form.





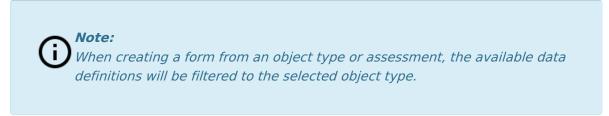
Description Field

3. Select ${\bf Navigation}\ {\bf Form}\ {\bf from}\ {\bf the}\ {\bf Form}\ {\bf Type}\ {\bf dropdown}\ {\bf menu}.$

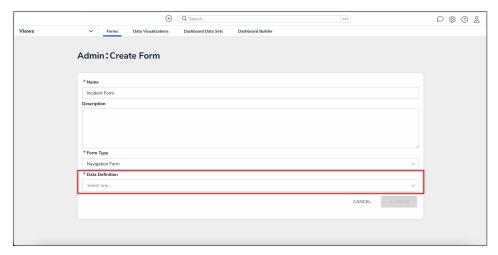


Form Type Dropdown

4. Select a data definition from the **Data Definition** dropdown menu. This will determine which objects will appear in the tree on the form. If a user doesn't have permission to view an object, that object and any others below it in the tree will not be visible. See Data Definitions for more information.

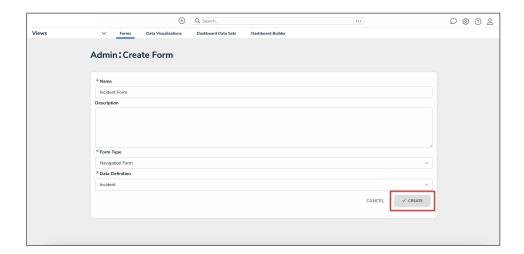






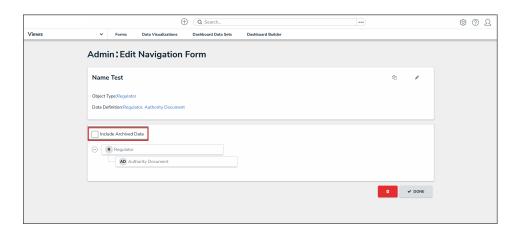
Data Definition Dropdown

5. Click the **Create** button.



Create Button

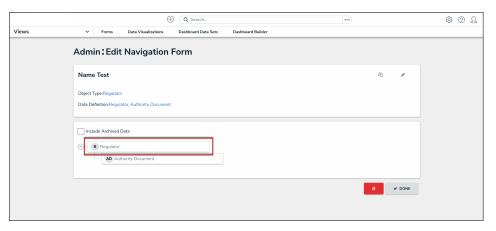
6. To include archived data in the tree view, click the **Include Archived Data** checkbox.



Include Archived Data Checkbox

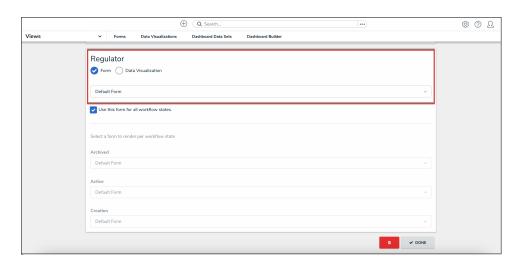
7. Click the first object type in the tree (this is the anchor object type) to configure it.





Anchor Object Type

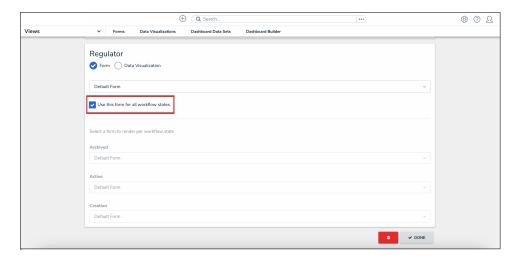
- 8. Select either **Form** or **Data Visualization** to choose what's displayed to a user (a standard form or report) when they click an object type node in the tree.
 - If you selected **Form**:
 - a. Select a form for the object type from the dropdown.



Object Type Form

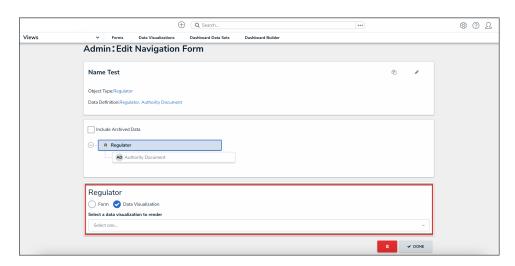
b. (Optional): Deselect the Use this form for all workflow states checkbox if you wish to specify which form to display for each state in the object type's workflow. If you deselected this checkbox, select a form from the dropdown.





Use This Form for all Workflow States Checkbox

- If you selected **Data Visualization**:
 - a. Choose a report for the object type from the Select a data visualization to render dropdown.

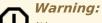


Object Type Data Visualization



Note:

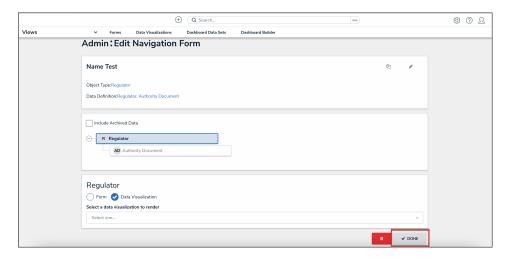
If you do not select a specific form or report to display, any form selected in the object type's workflow permissions for its current state will display by default.



It's recommended that repeatable form reports are not added to navigation forms as doing so may cause performance issues, depending on the amount of data displayed in the form or report.



- 9. Continue clicking through each object type in the tree to choose which form or report is displayed to the user.
- 10. Click the **Done** button to save your changes.



Done Button

Once the form is successfully created and configured, it can be added to a view, the Messaging action in a workflow, or when clicking an object on the My Tasks page.