Create a Form View

Last Modified on 11/27/2023 2:06 pm EST

Overview

A **Form View** is a list of objects or assessment objects. Admins can specify which objects and forms are displayed based on the object type and workflow state.

User Account

The user account you use to log into Resolver must have Administration permissions.

Related Information/Setup

For more information on Activity Views, please refer to the Views Overview article.

- Views Overview

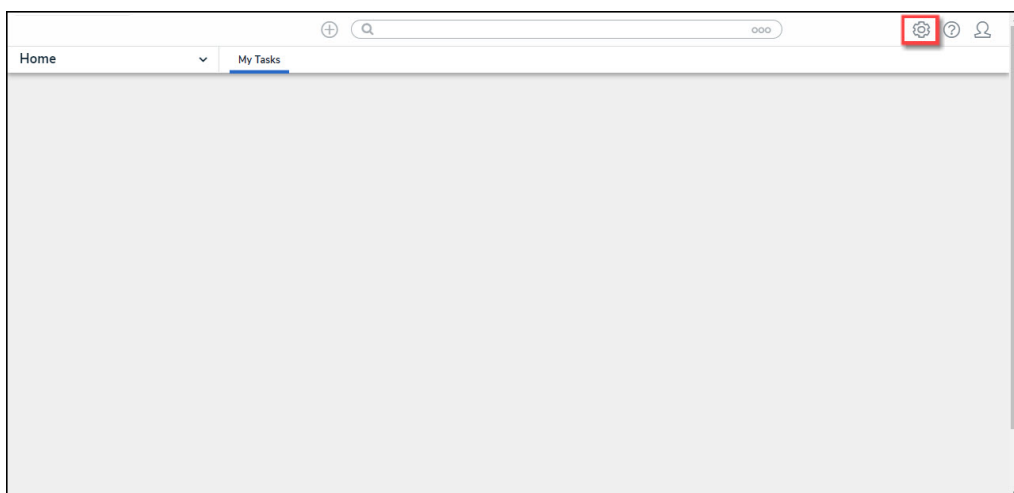For more information on Assessments, please refer to the Assessments section.

- Assessments

For more information on Workflows and Workflow States, please refer to the Workflow section.
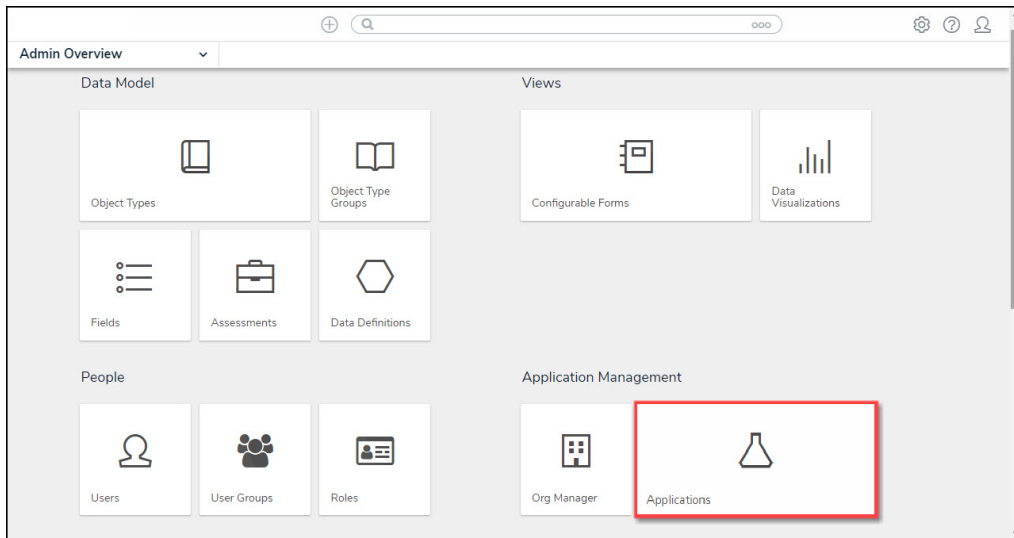
- Workflows

Navigation

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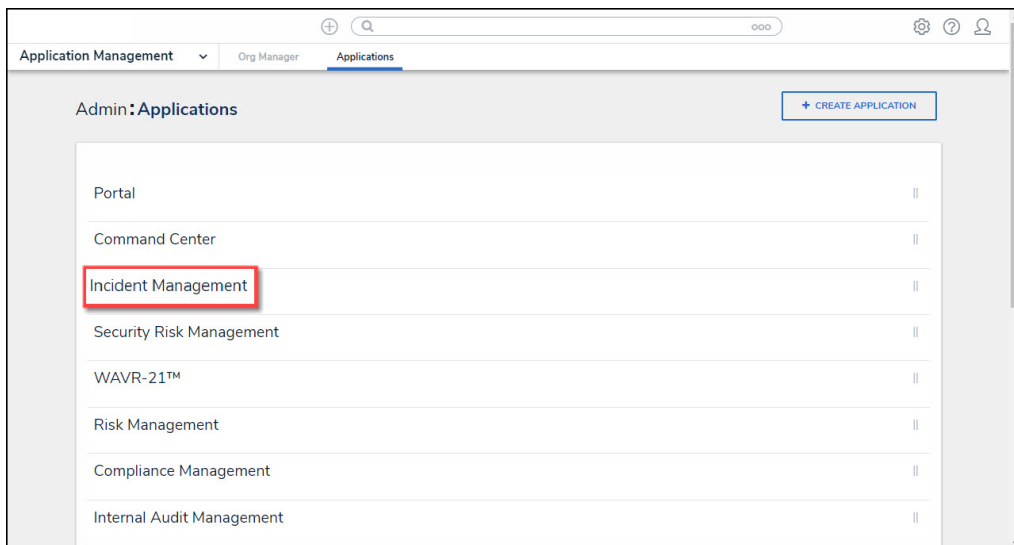

Systems Icon

2. From the **Admin Overview** screen, click the **Applications** tile under the **Application Management** section.
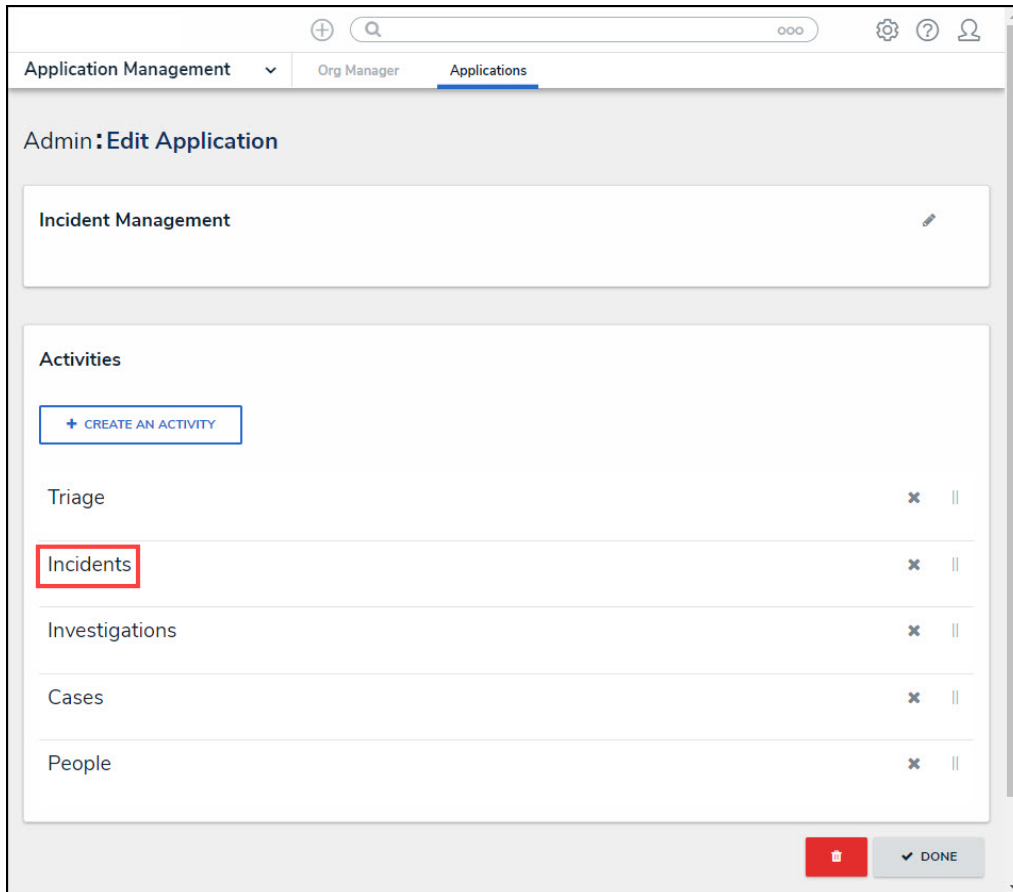

Applications Tile

3. From the **Admin Applications** screen, click an **Application**.
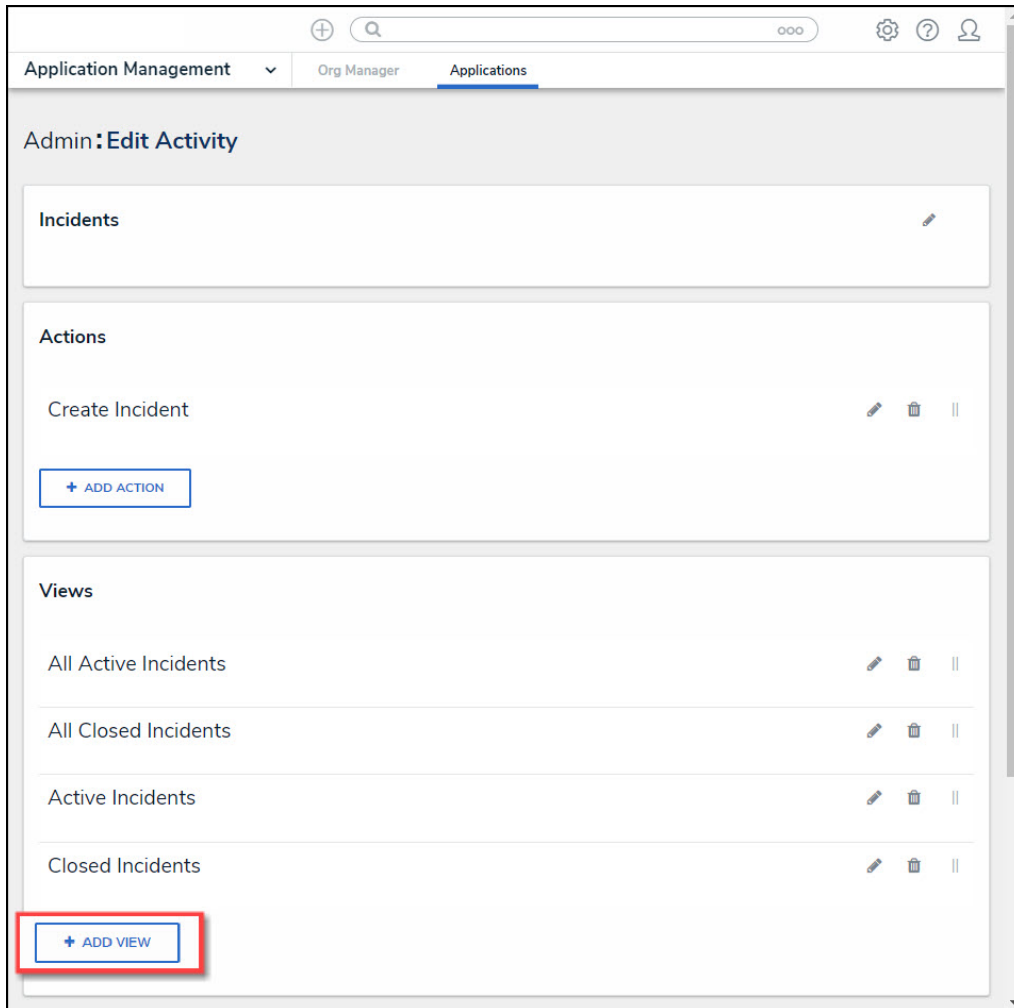

Click an Application

4. From the **Admin Edit Application** screen, click an **Activity**.

Click an Activity

5. From the **Admin Edit Activity** screen, click the **+ Add Views** button under the **View** section.

+ Add View Button

Create a Data Export View

1. From the **Views** section, enter the following information in the fields provided:

Admin : Edit Activity

Incidents ✎

Actions

Create Incident   ✎ 🗑 ‖

[+ ADD ACTION]

Views

All Active Incidents   ✎ 🗑 ‖

All Closed Incidents   ✎ 🗑 ‖

Active Incidents   ✎ 🗑 ‖

Closed Incidents   ✎ 🗑 ‖

Name

[*]

Description

[   ]

Basic Markdown Formatting   ⊞
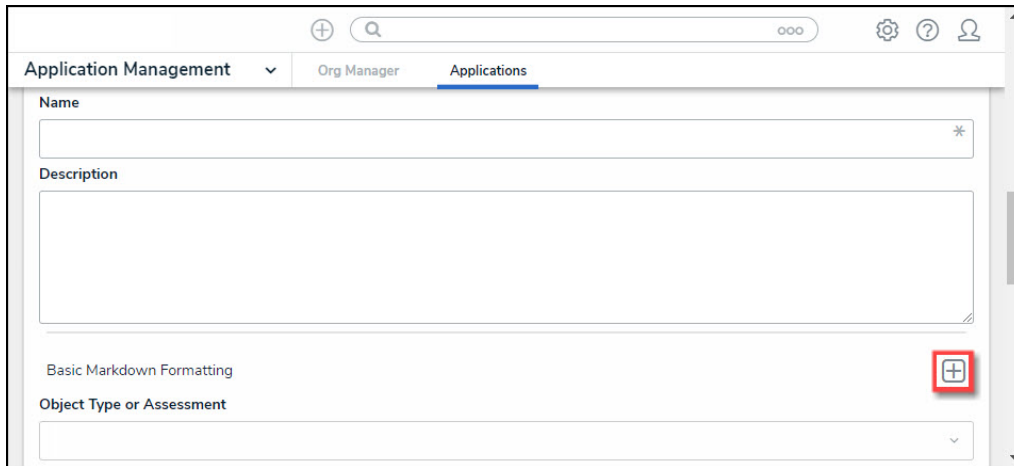
Object Type or Assessment

[⌄]

Workflow States

[⌄]

View Action

[Form   ⌄]

Define Form to Show

[Default Form   ⌄]

Display Options

[Show view title when empty   ⌄]

Sorting Options

[Property   ⌄]

[Unique ID   ⌄]   ⦿ Ascending ◯ Descending

CANCEL   ✓ CREATE

- **Name:** Enter the Name of the Activity View in the **Name** field. The **Name** will appear as a header below the Activity View.

- **(Optional) Description:** Enter a description in the **Description** field, which appears when a user has opened the Activity View. If necessary, apply Markdown formatting to the text. Click the **Expand** icon beside **Basic Markdown Formatting** to view popular formatting styles.

Expand Icon

- **Object Type or Assessment:** Select an object type or assessment from the Object Type or Assessment dropdown menu to specify which Objects will be available in the Activity View.

- **Workflow States:** Select one or more assessment or object type states from the Workflow States dropdown menu to specify which objects or instances will be displayed based on their current states. Workflow State options are based on the option selected in the Object Type or Assessment dropdown.

- **View Action:** Select **Form** from the **View Action** dropdown menu.

- **Define Form to Show:** Select a previously created **Form** from the **Define Form to Show** dropdown menu.

- **Display Options:** Select a Display Option from the **Display Options** dropdown menu:
    - **Show view title when empty:** Shows the Activity View's activity title when the view has no data to display.
    - **Hide view title when empty:** Hides the Activity View's activity title when the view has no data to display.

- **Sorting Options:** Currently, two **Sorting Options** are available for Activity Views within the system, Property and Unique ID. Users can select whether to sort an Activity View by Unique ID Ascending or Descending by selecting a corresponding radio button. By default, the Unique ID Sorting Option is set to Ascending.

2. Click the **Create** button to add the Activity View to the system.

3. Repeat the above steps to add another Activity View to the system.

4. Click the **Reorder** icon, continue to hold the mouse button and drag and drop the Activity View to rearrange the Activity View order.
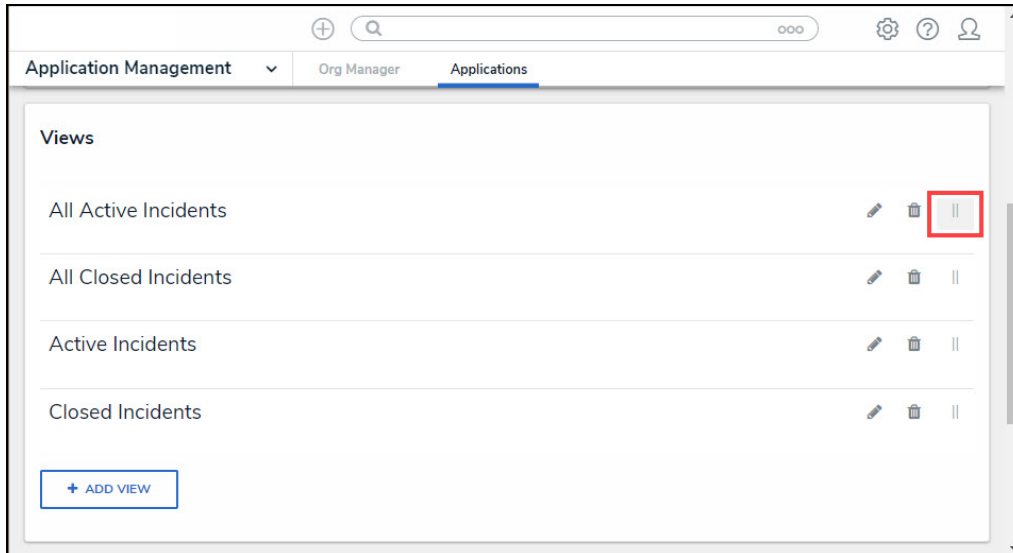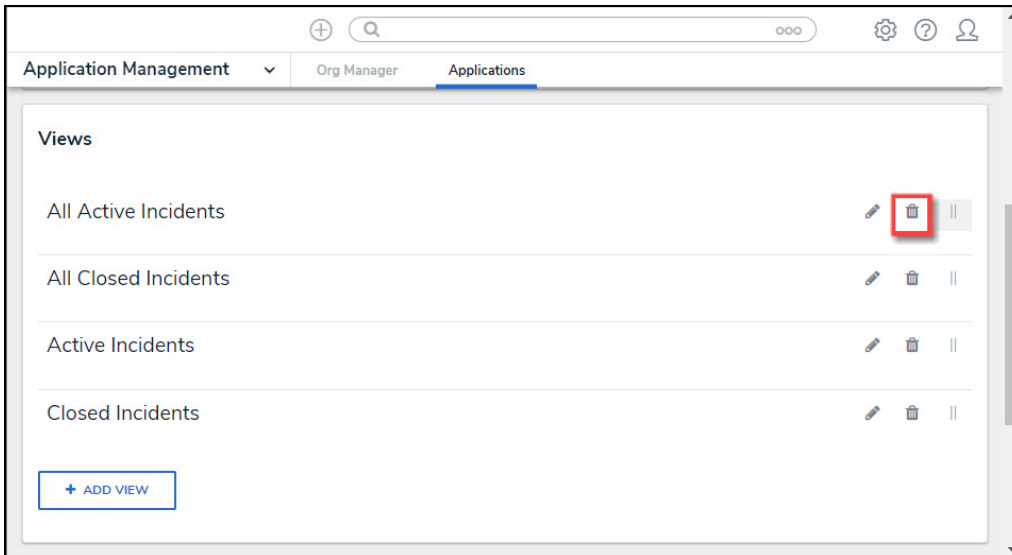

Reorder Icon

5. Click the **Edit** icon to edit an Activity View.
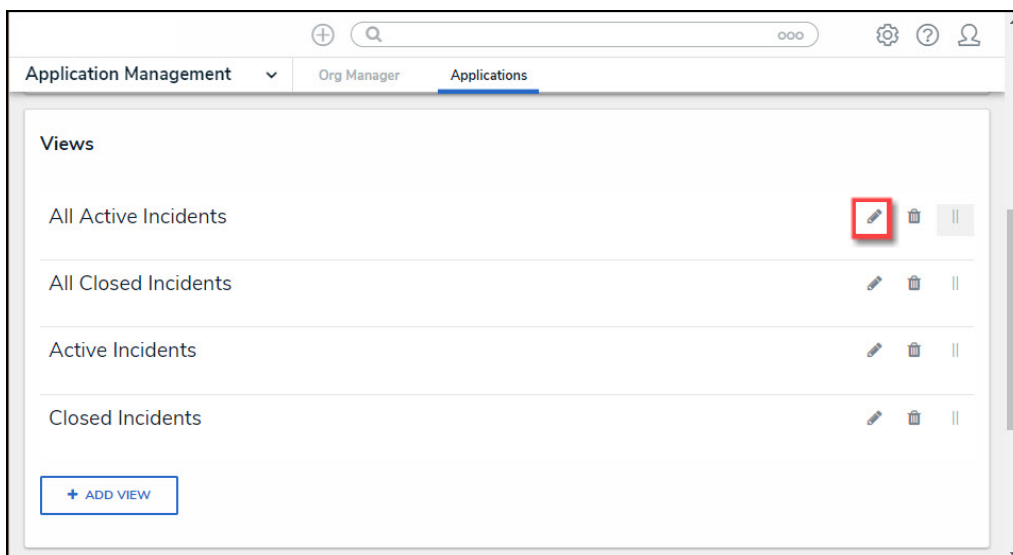
Edit Icon

6. Click the **Delete** icon to delete an Activity View. A ***Confirmation*** screen will appear. Click on the **Yes** button to delete the Activity View from the system.

Delete Icon