


Create & Modify Forms

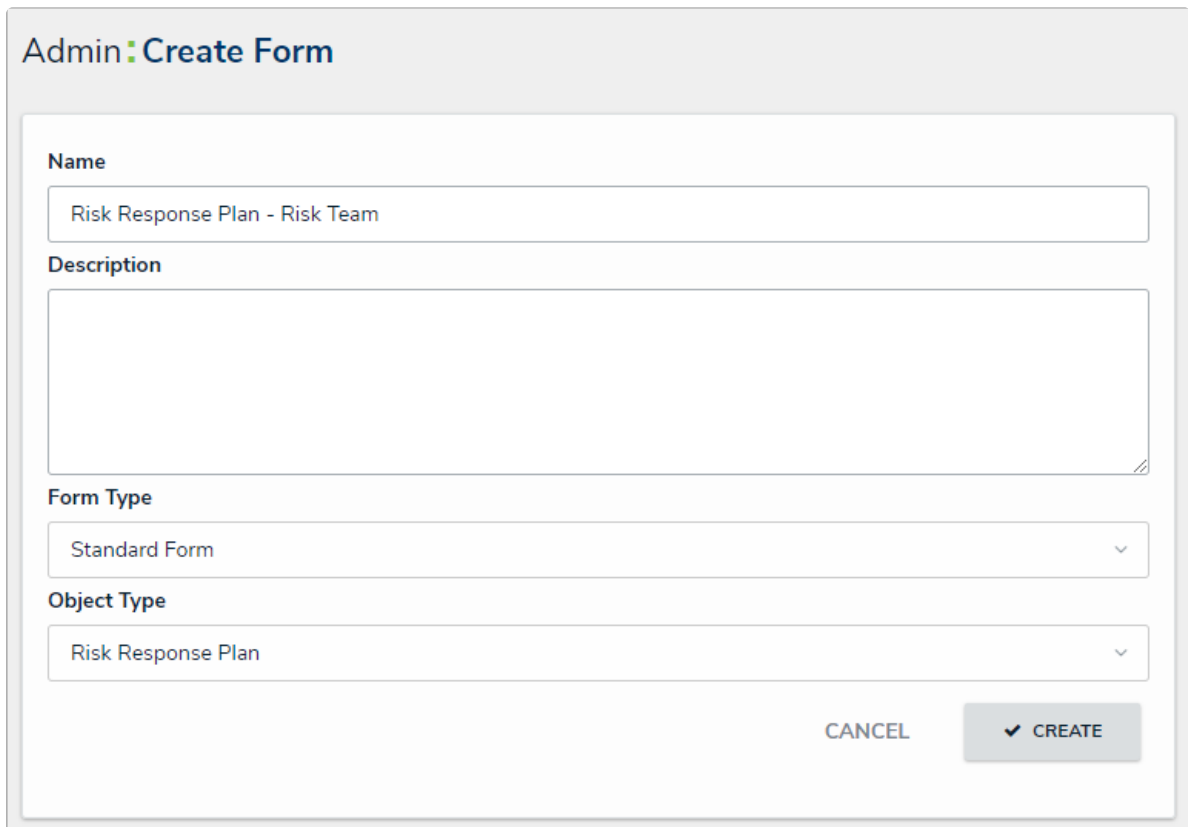
Last Modified on 04/27/2022 10:14 am EDT

For more detailed information, see the [Standard Forms](#) section in the **Resolver Core Administrator's Guide**.

The following are basic instructions for creating a new form. For more information on creating user-friendly forms, see the [Form Design Best Practices](#) article.

To create a new standard form:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click **Create Configurable Form**.
3. Enter **Risk Response Plan - Risk Team** in the **Name** field.
4. Select **Standard Form** from the **Form Type** dropdown menu.
5. Select **Risk Response Plan** from the **Object Type** dropdown menu.



Admin: Create Form

Name

Risk Response Plan - Risk Team

Description

Form Type

Standard Form

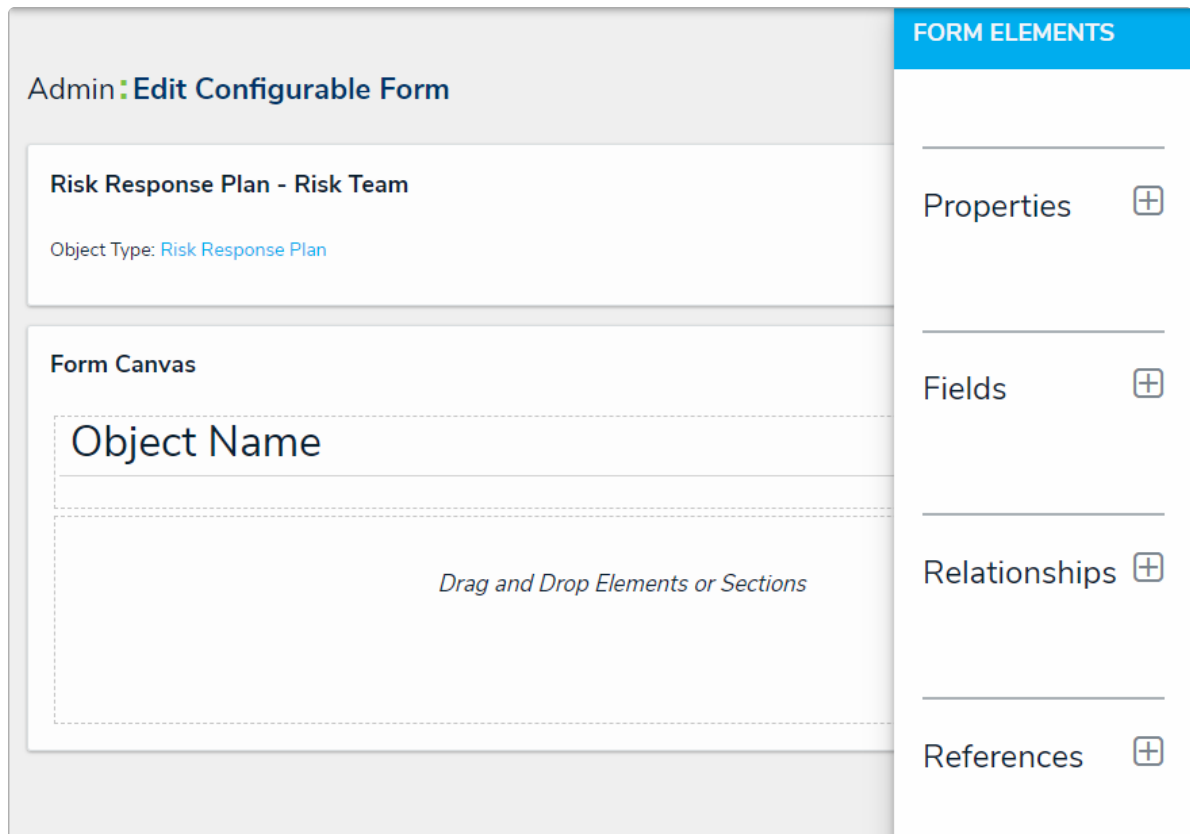
Object Type

Risk Response Plan

CANCEL CREATE

The Create Form page.

6. Click **Create** to display the **Edit Configurable Form** page.

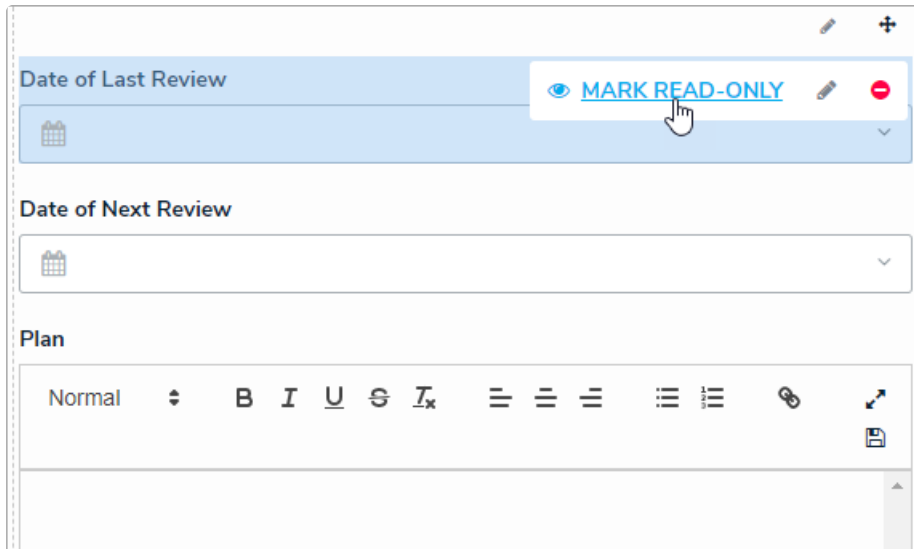


The Edit Configurable Form page.


7. Add the following elements to the form:

- Name (Property)
- Description (Property)
- Date of Last Review (Field)
- Date of Next Review (Field)
- Plan (Field)
- Supporting Attachments (Field)
- Risk Impact (Formula)
- Number of Risks (Formula)
- Risk (Relationship)
- Requirement (Relationship)
- Company (Reference)
- The Create, Active, Archive, and Complete Update states (State Triggers)




8. Hover your cursor over the **Date of Last Review** field, then click **Mark Read-only**.



The Date of Last Review field on the form.

9. Click the  icon in header section of the canvas to display the **Edit Header Section** window.
10. Enable **Workflow State Bar** and **Unique ID** in the **Add to Header** section, then click **Done**.

To duplicate the form:

1. From the **Edit Configurable Form** page for the **Risk Response Plan - Risk Team** form, click the  icon to the far right of the form's name.
2. Click **Duplicate**.
3. Click the  icon to the right of the form's name at the top of the page, then rename the form **Risk Response Plan - Plan Owner**.
4. Hover your cursor over the following fields, then click **Mark Read-only**:
 - Name
 - Description
 - Date of Last Review
 - Date of Next Review
5. Hover your cursor over the **Create**, **Active**, and **Archive** states, then click the  icon to delete them from the form. Only the **Complete Update** trigger should remain on the form canvas.

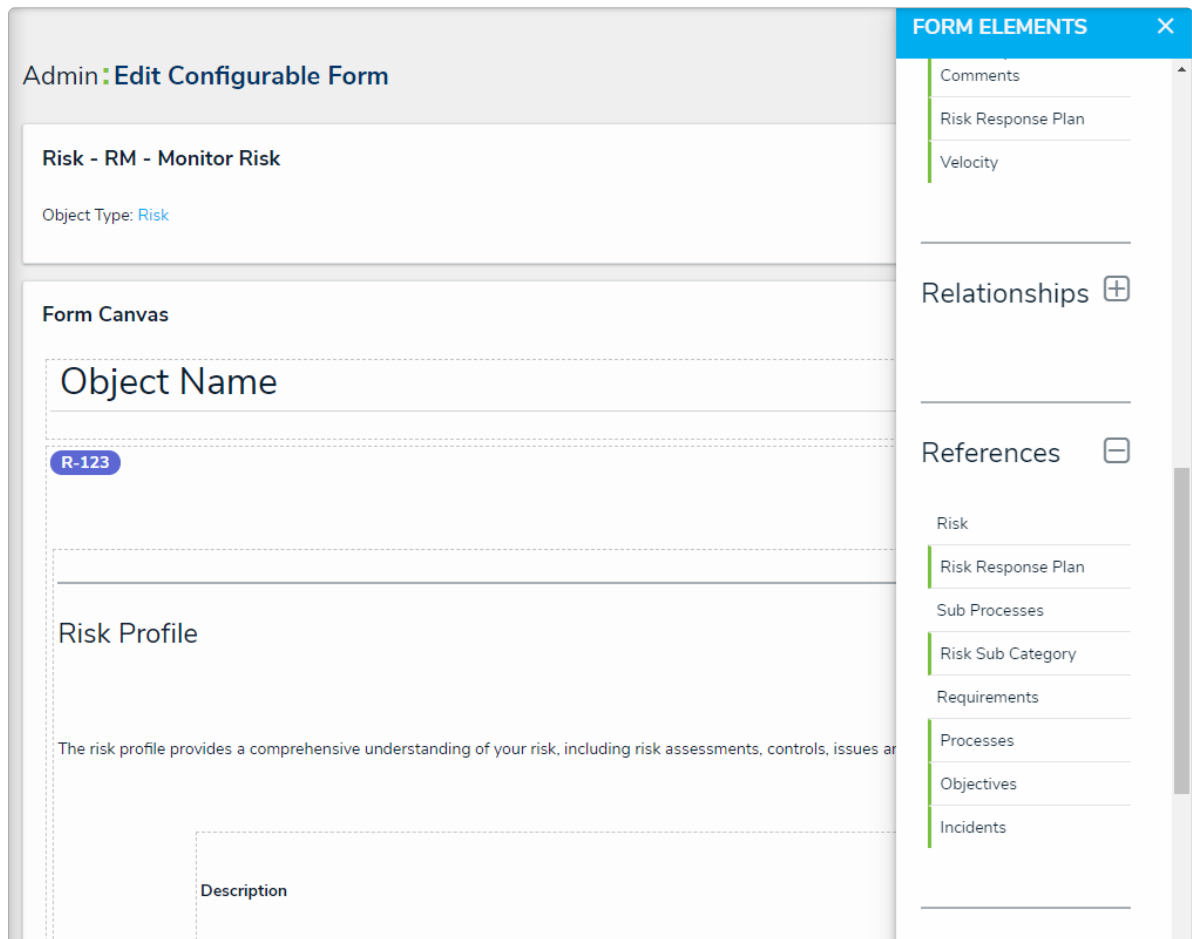
Modify Existing Forms

The following steps provide instructions for modifying existing risk forms in your organization. You may need to add these elements to multiple forms on the risk, as well as forms for your processes, vendors, assets, and any other object types linked to your plans.

To modify existing risk forms:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.

2. Search for and select a form most commonly used by the Risk team. In this case, the **Risk - RM - Monitor Risk** form is edited.



The Edit Configurable Form page.

3. Add the **Risk Response Plans** reference to the form.
4. Click the **Forms** tab to return the **Configurable Forms** page, then search for or create a form for the **Company** object type that's most commonly used by the Risk team (e.g., Company - Edit). In this case, the Company - **GRC - Overview** form is edited.
5. Add the **Risk Response Plans** relationship to the form, then configure it to display as a [relationship table](#).