

Create & Modify Forms

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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 \bigcirc 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.

dmin : Create Form			
Name			
Risk Response Plan - Risk Team			
Description			
Form Type			
Standard Form			````
Object Type			
Risk Response Plan			
		CANCEL	✓ CREATE
	Form page		

The Create Form page.

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



	FORM ELEMENTS		
Admin : Edit Configurable Form Risk Response Plan - Risk Team	Properties	±	
Object Type: Risk Response Plan Form Canvas	Fields	+	
Object Name Drag and Drop Elements or Sections	Relationships	; 🕀	
	References	Ŧ	

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**.

Resolver.

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Date of Last Review MARK READ-ONLY	ø	•
		~
Date of Next Review		
		~
Plan		
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		8
		*

The Date of Last Review field on the form.

- 9. Click the picon 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:

- From the Edit Configurable Form page for the Risk Response Plan Risk Team form, click the A 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
- 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 \bigcirc 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.

	FORM ELEMENTS	×
dmin <mark>: Edit Configurable Form</mark>	Comments	
	Risk Response Plan	
Risk - RM - Monitor Risk	Velocity	
Object Type: Risk		
Form Canvas	Relationships 🕀	
Object Name		
R-123	References 🖯	
	Risk	
	Risk Response Plan	
Diale Des file	Sub Processes	
Risk Profile	Risk Sub Category	
	Requirements	
The risk profile provides a comprehensive understanding of your risk, including risk assessments, controls, issues ar	Processes	
	Objectives	
	Incidents	
Description		

The Edit Configurable Form page.

- 3. Add the **Risk Response Plans** reference to the form.
- 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.

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