


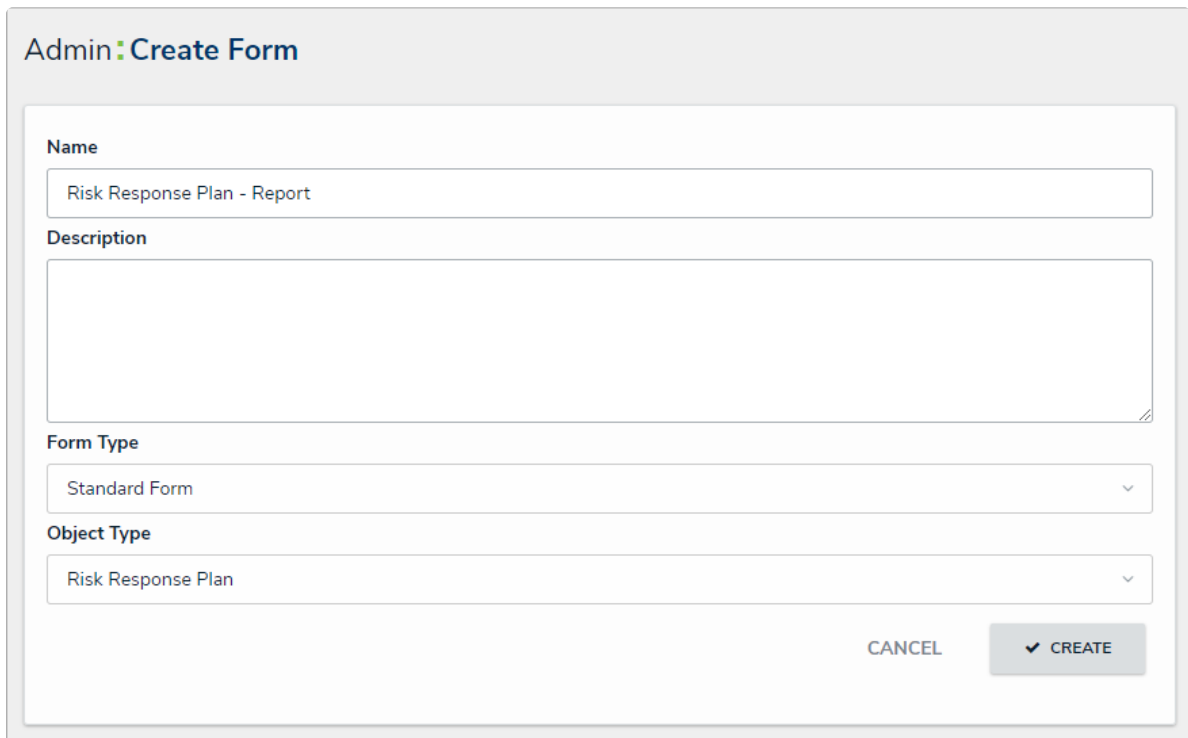
Create Repeatable Forms

Last Modified on 02/26/2025 3:41 pm EST

Repeatable forms are reports that display object data as it was entered into a form. This allows users to view and share non-editable, printer-friendly versions of completed forms with other users. This report type makes it easy to save Risk Response Plans locally in PDF form. Read more here: [Add Repeatable Forms to a Report](#).

To create a configurable form to use in the report:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click **Create Configurable Form**.
3. Enter **Risk Response Plan - Report** 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 - Report

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.
7. Add the following elements to the form canvas:
 - Name (Property)
 - Description (Property)
 - Date of Last Review (Field)
 - Date of Next Review (Field)
 - Plan (Field)
 - Plan Criticality (Field)
 - Potential Impact (Formula)

The Edit Configurable Form page.

8. Click your browser's back button when complete (Core automatically saves your changes).

To create a repeatable form report:

1. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
2. Click **Create Data Visualization**.
3. Enter **Company - Risk Response Plan Tracker** in the **Name** field.
4. Ensure **Report** is selected in the **Type** dropdown menu.
5. Select **Risk Response Plan** from the **Data Visualization Focus** dropdown menu.
6. Click **Create** to display the **Edit Report** page.
7. Expand **Display** from the **Elements** menu to the left of the **Report Canvas**.
8. Drag and drop the **Repeatable Forms** element to the **Report Canvas**.
9. Select **Risk Response Plans** from the **Select a data series** dropdown menu, then click back on your browser to display the **Edit Repeatable Form** palette.
10. From the **Data Type** tab, deselect the **Select All** checkbox.
11. Click the **Forms** tab.
12. Select **Risk Response Plan - Report** from the **Define Custom Forms** section.

Data series: Risk Response Plans

Data Type **Forms** Parameters

SELECT A RELATIONSHIP

Anchor ▼

DEFINE CUSTOM FORMS

Risk Response Plan

Risk Response Plan - Report ▼

SELECT FORM TITLE

Risk Response Plan

None ▼

Add page break before each new form title

The Edit Repeatable Form palette.

13. Click your browser's back button when complete (Core automatically saves your changes).