


Create a Navigation Form

Last Modified on 04/20/2021 12:05 pm EDT



Data grids are not currently supported in navigation forms.

To create a new navigation form:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click **Create Configurable Form**.
3. Enter the name of the form in the **Name** field.
4. **Optional:** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form and on the **Configurable Forms** landing page.
5. Select **Navigation Form** from the **Form Type** dropdown menu.
6. 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.

Admin: Create Form

Name

Location Navigation Form

Description

Form Type

Navigation Form

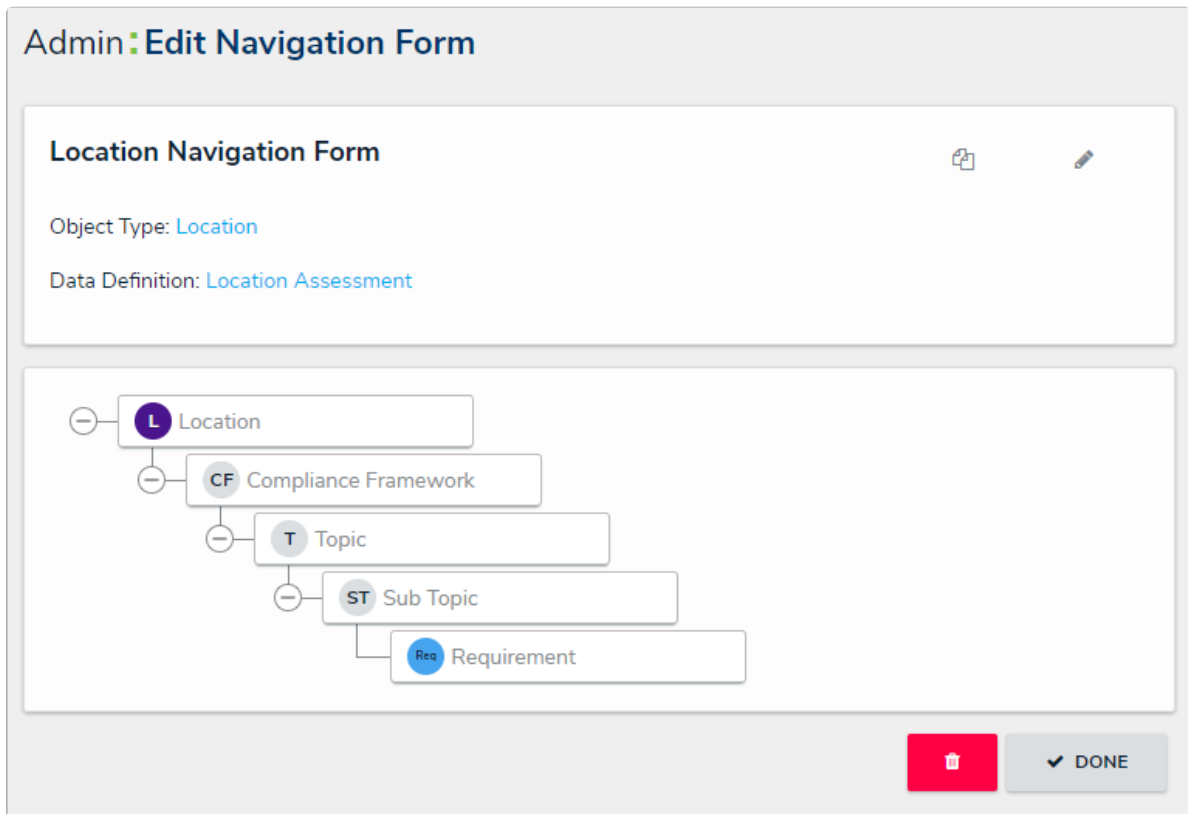
Data Definition

Location Assessment

CANCEL CREATE

The Create Form page.

- Click **Create** to display the **Edit Navigation Form** page.



The Edit Navigation Form page.

- Click the first object type in the tree (this is the anchor object type).
- 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**:
 - Select a form for the object type from the dropdown menu.
 - 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 menus below.

Location

Form Data Visualization

Location - Create

Use this form for all workflow states.

Select a form to render per workflow state

Inactive

Location - Create

Selecting a standard form to display when a user clicks an object type in the nav form.

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

Location

Form Data Visualization

Select a data visualization to render

SRM - Location Dashboard

Selecting a data visualization to display when a user clicks an object type in the nav form.



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 nav forms as doing so may cause performance issues, depending on the amount of data displayed in the form or report.

10. Continue clicking through each object type in the tree to choose which form or report is displayed to the user.
11. Click **Done** when finished.

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.