

# Create a Navigation Form

Last Modified on 08/07/2024 9:54 am EDT

## Overview

A [navigation form](#) is a configurable form that provides visual context for objects and assessments and helps users understand how each object relates to one another.



**Note:**

Data grids are not currently supported in navigation forms.

## User Account Requirements

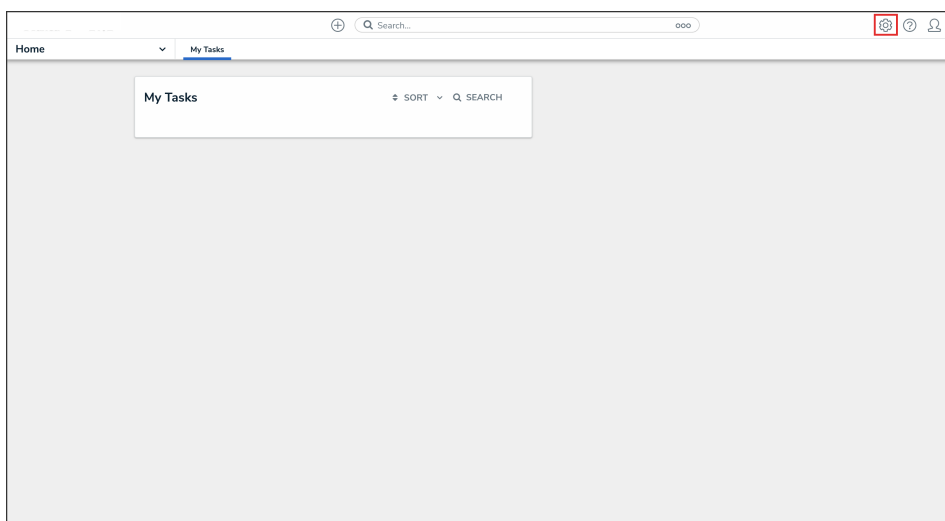
The user must have Administrator permissions in order to access the **Admin Overview** section.

## Related Information/Setup

Please refer to the [Navigation Form Overview](#) article for more information on using navigation forms.

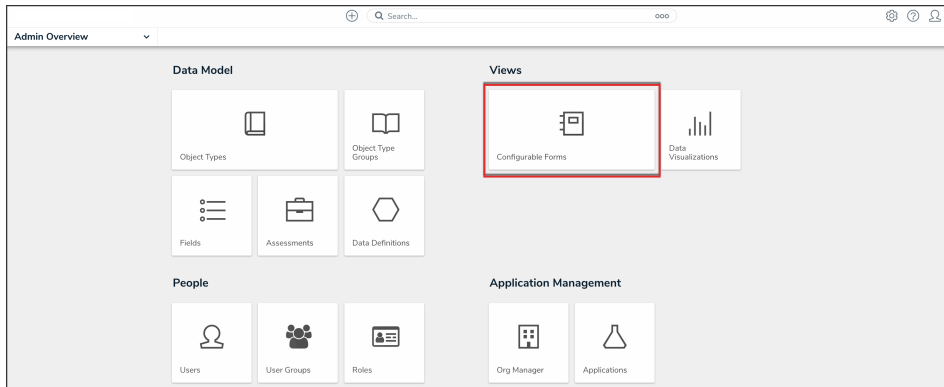
## Navigation

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



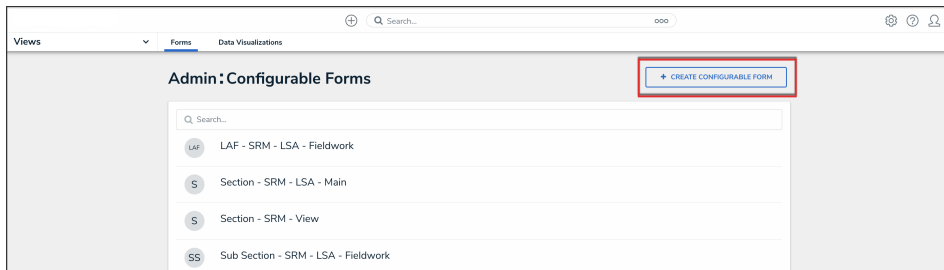
*Administration Icon*

2. From the **Admin Overview** screen, click the **Configurable Forms** tile under the **Views** section.



*Configurable Forms Tile*

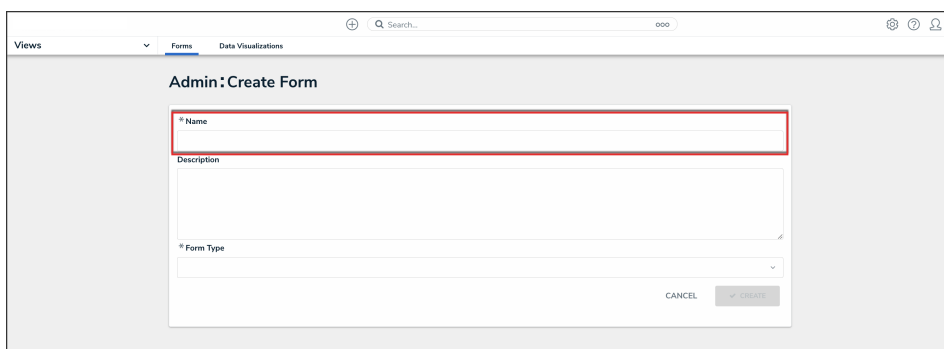
3. From the **Admin: Configurable Forms** screen, click the **Create Configurable Form** button.



*Create Configurable Form Button*

## Creating a New Navigation Form

1. From the **Admin: Create Form** screen, enter the name of the form in the **Name** field.



*Name Field*

2. **(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.

The screenshot shows the 'Admin: Create Form' page in the Resolver application. The page has a header with 'Views' and 'Forms' tabs, and a search bar. The main content area contains a form with the following fields: 'Name' (text input), 'Description' (text area), and 'Form Type' (dropdown menu). The 'Description' field is highlighted with a red border. At the bottom right of the form, there are 'CANCEL' and 'CREATE' buttons.

*Description Field*

3. Select **Navigation Form** from the **Form Type** dropdown menu.

The screenshot shows the 'Admin: Create Form' page with the 'Form Type' dropdown menu open. The dropdown menu is highlighted with a red border and shows two options: 'Standard Form' and 'Navigation Form'. The 'Navigation Form' option is selected and highlighted. The 'Description' field is also visible above the dropdown menu.

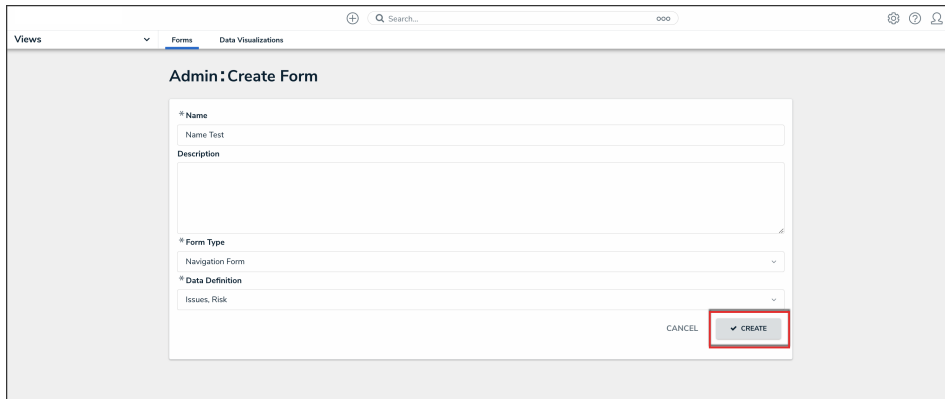
*Form Type Dropdown*

4. 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.

The screenshot shows the 'Admin: Create Form' page with the 'Data Definition' dropdown menu open. The dropdown menu is highlighted with a red border and shows a list of data definitions. One data definition is selected and highlighted. The 'Form Type' dropdown menu is also visible above it, showing 'Navigation Form' as the selected option.

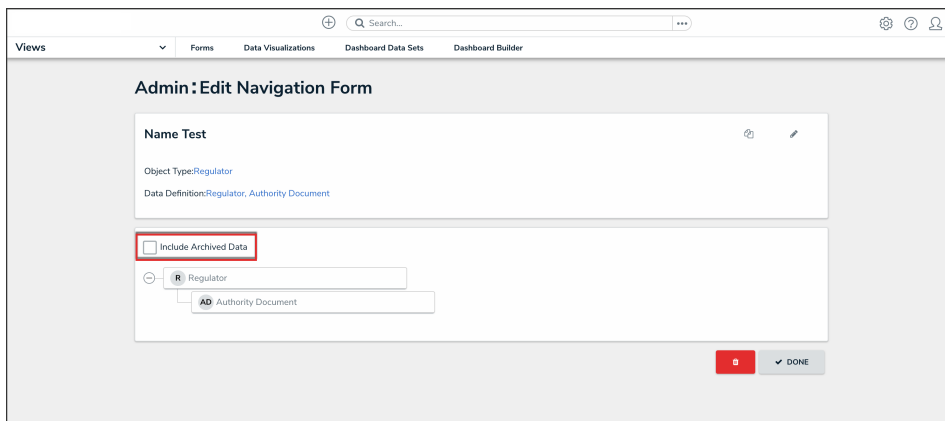
*Data Definition Dropdown*

5. Click the **Create** button.



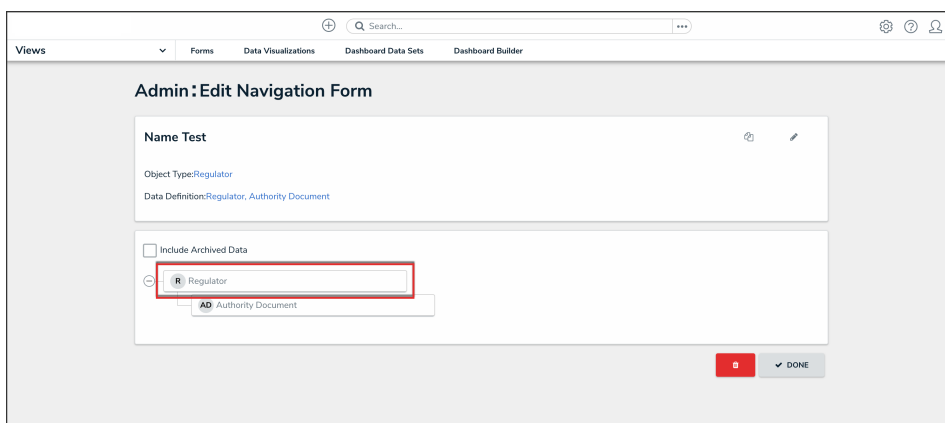
*Create Button*

6. To include archived data in the tree view, click the **Include Archived Data** checkbox.



*Include Archived Data Checkbox*

7. Click the first object type in the tree (this is the anchor object type) to configure it.



*Anchor Object Type*

8. 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**:

- a. Select a form for the object type from the dropdown.

The screenshot shows the 'Regulator' configuration page in the Resolver dashboard builder. The 'Form' radio button is selected, and a dropdown menu is open showing 'Default Form' as the selected option. The 'Use this form for all workflow states' checkbox is checked. Below, there are dropdown menus for 'Archived', 'Active', and 'Creation' states, all set to 'Default Form'. A red box highlights the top section of the form configuration.

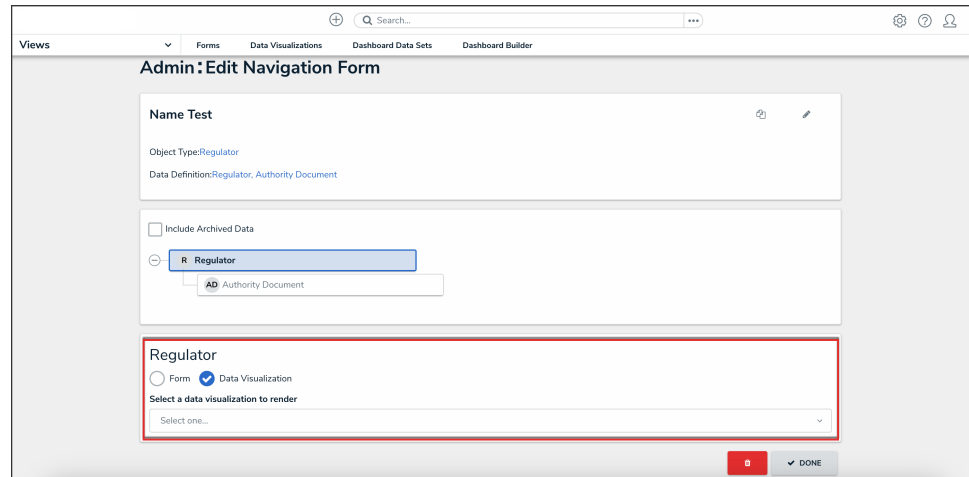
*Object Type Form*

- b. **(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.

The screenshot shows the 'Regulator' configuration page in the Resolver dashboard builder. The 'Form' radio button is selected, and the 'Use this form for all workflow states' checkbox is checked. Below, there are dropdown menus for 'Archived', 'Active', and 'Creation' states, all set to 'Default Form'. A red box highlights the 'Use this form for all workflow states' checkbox.

*Use This Form for all Workflow States Checkbox*

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



*Object Type Data Visualization*

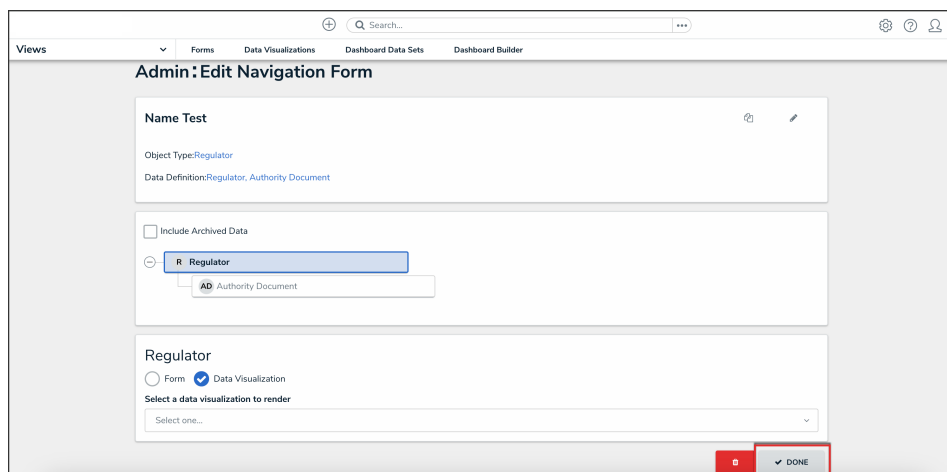
**Note:**

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.

**Warning:**

It's recommended that **repeatable form** reports are not added to navigation forms as doing so may cause performance issues, depending on the amount of data displayed in the form or report.

9. Continue clicking through each object type in the tree to choose which form or report is displayed to the user.
10. Click the **Done** button to save your changes.



*Done Button*

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.