

Create a Form View

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

Overview

A **Form View** is a list of objects or assessment objects. Admins can specify which objects and forms are displayed based on the object type and workflow state.

User Account

The user account you use to log into Resolver must have Administration permissions.

Related Information/Setup

For more information on Activity Views, please refer to the Views Overview article.

- [Views Overview](#)

For more information on Assessments, please refer to the Assessments section.

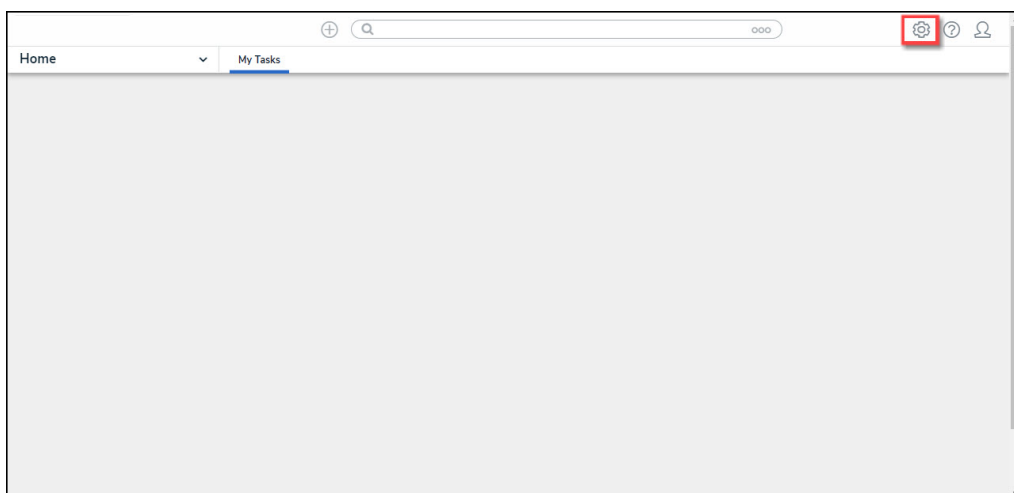
- [Assessments](#)

For more information on Workflows and Workflow States, please refer to the Workflow section.

- [Workflows](#)

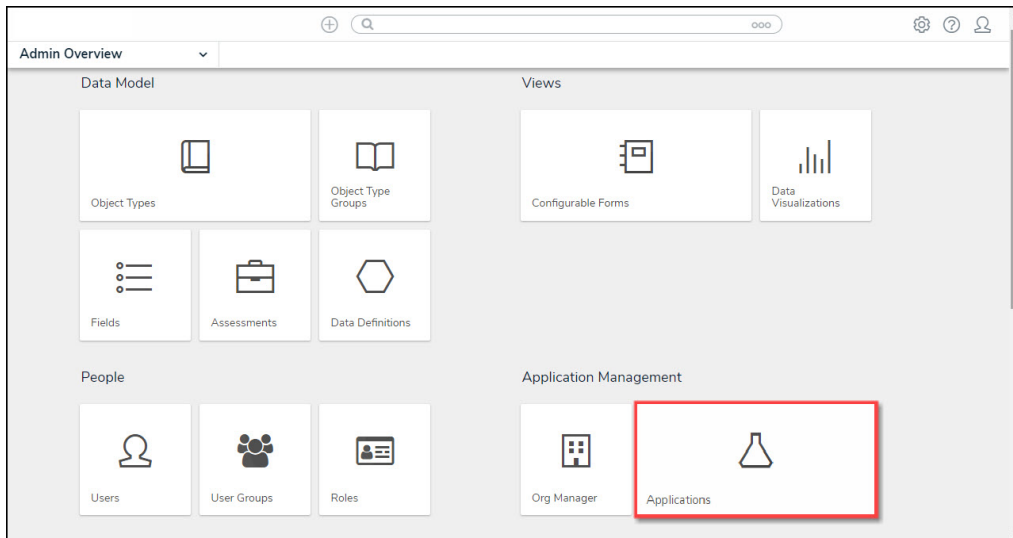
Navigation

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



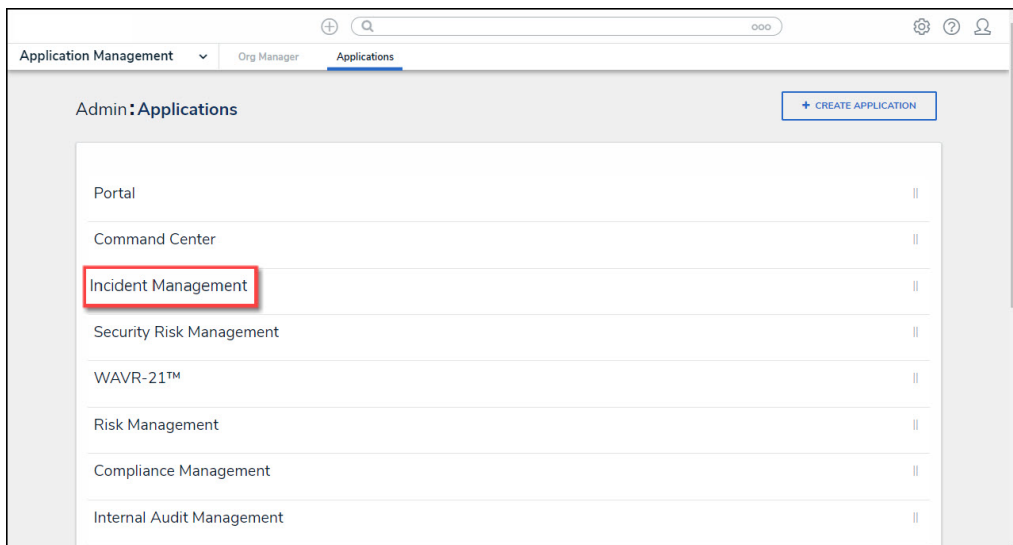
Systems Icon

- From the **Admin Overview** screen, click the **Applications** tile under the **Application Management** section.



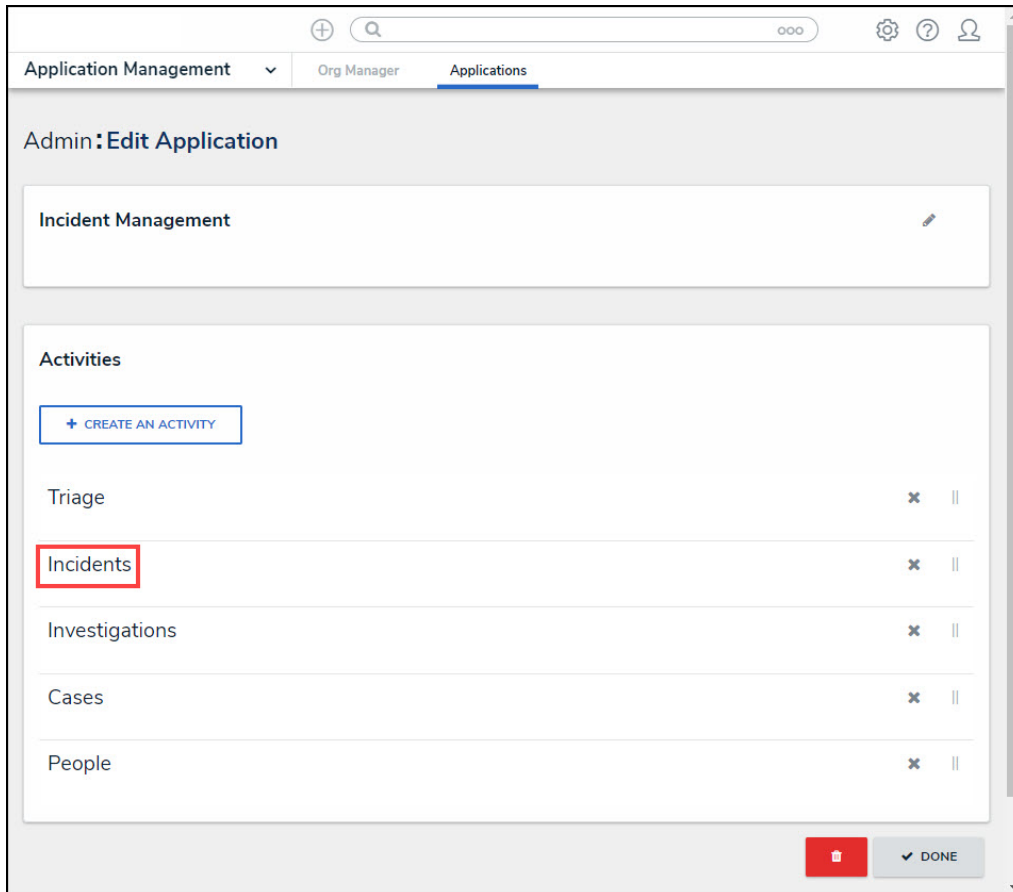
Applications Tile

- From the **Admin Applications** screen, click an **Application**.



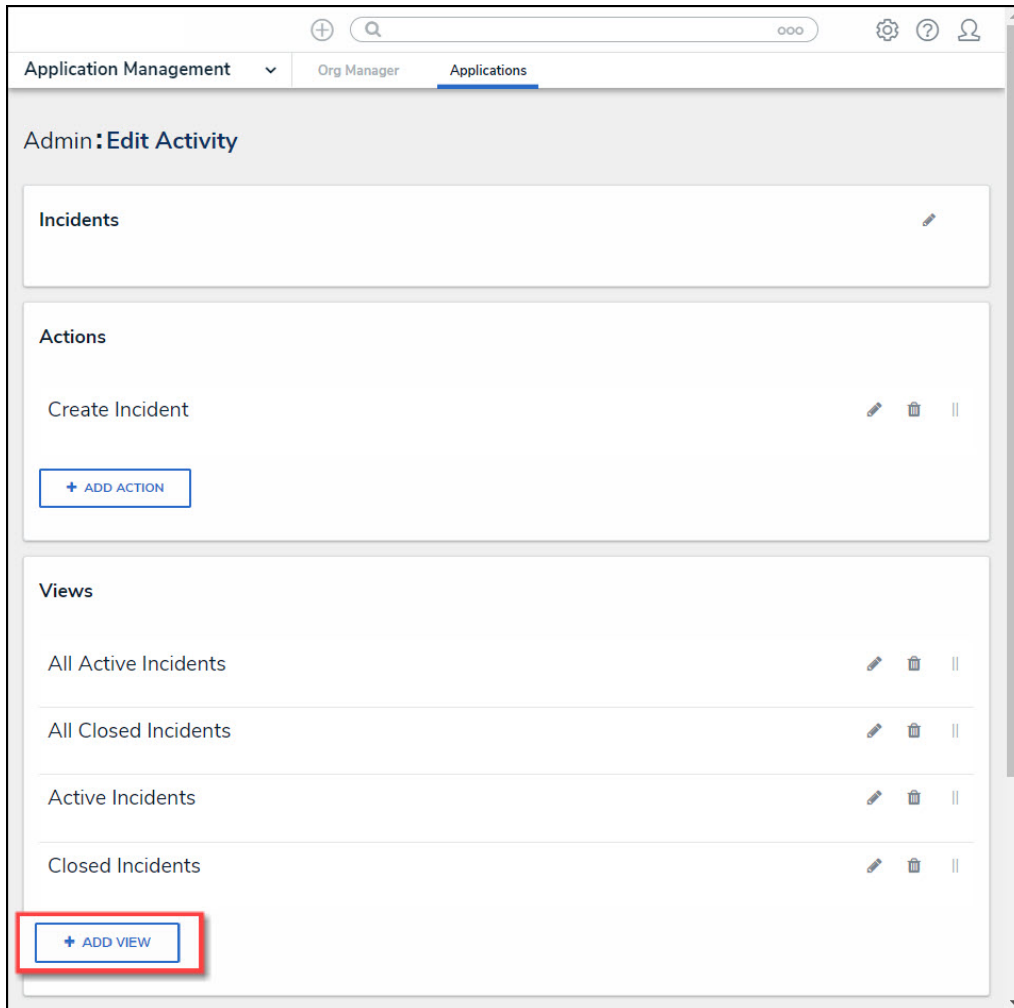
Click an Application

- From the **Admin Edit Application** screen, click an **Activity**.



Click an Activity

5. From the **Admin Edit Activity** screen, click the **+ Add Views** button under the **View** section.



+ Add View Button

Create a Data Export View

1. From the **Views** section, enter the following information in the fields provided:

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Application Management ▾Org ManagerApplications

Admin : Edit Activity

Incidents ✎

Actions

Create Incident ✎ 🗑️ ||

+ ADD ACTION

Views

All Active Incidents	✎ 🗑️
All Closed Incidents	✎ 🗑️
Active Incidents	✎ 🗑️
Closed Incidents	✎ 🗑️

Name

Description

Basic Markdown Formatting +

Object Type or Assessment

Workflow States

View Action

Define Form to Show

Display Options

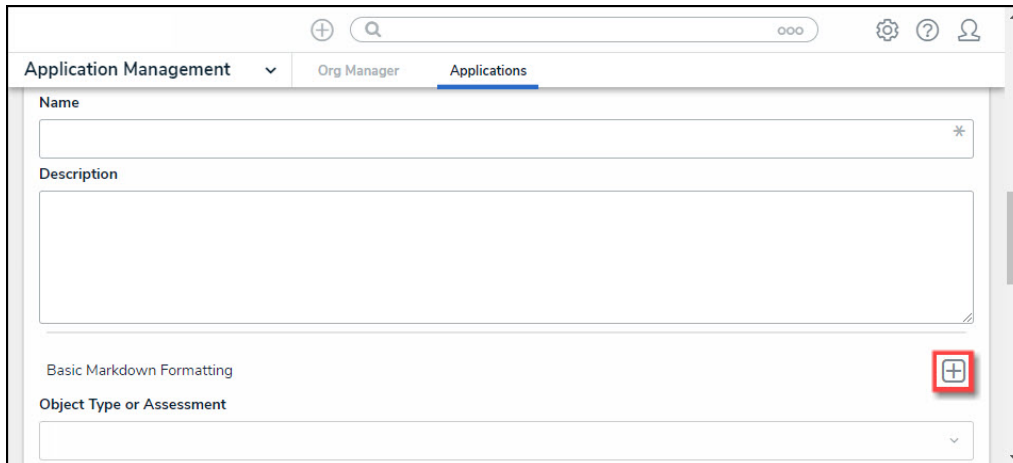
Sorting Options

Unique ID ▾ Ascending Descending

CANCEL CREATE

View Section

- **Name:** Enter the Name of the Activity View in the **Name** field. The **Name** will appear as a header below the Activity View.
- **(Optional) Description:** Enter a description in the **Description** field, which appears when a user has opened the Activity View. If necessary, apply [Markdown](#) formatting to the text. Click the **Expand** icon beside **Basic Markdown Formatting** to view popular formatting styles.

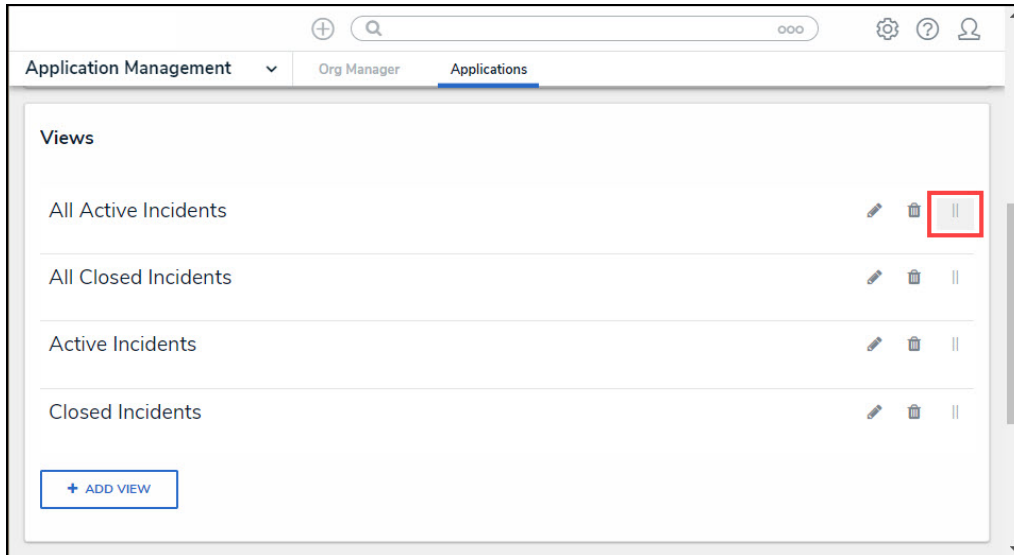


The screenshot shows a web interface for 'Application Management' with a sub-tab for 'Applications'. The form contains the following elements: a 'Name' text input field with an asterisk indicating it is required; a 'Description' text area; a 'Basic Markdown Formatting' section with a red box highlighting an 'Expand' icon (a square with a plus sign); and an 'Object Type or Assessment' dropdown menu.

Expand Icon

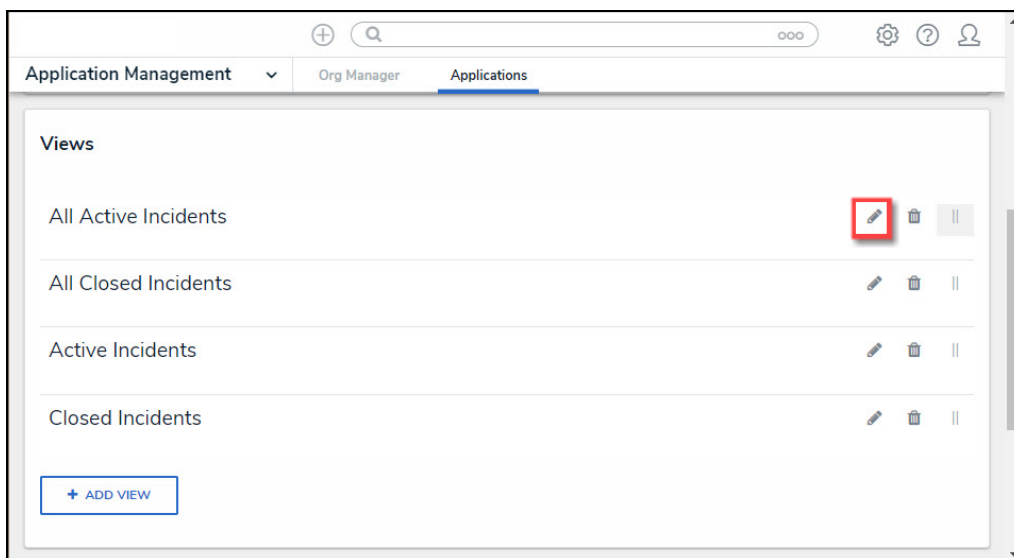
- **Object Type or Assessment:** Select an object type or [assessment](#) from the Object Type or Assessment dropdown menu to specify which Objects will be available in the Activity View.
- **Workflow States:** Select one or more assessment or object type states from the Workflow States dropdown menu to specify which objects or instances will be displayed based on their current states. Workflow State options are based on the option selected in the Object Type or Assessment dropdown.
- **View Action:** Select **Form** from the **View Action** dropdown menu.
- **Define Form to Show:** Select a previously created **Form** from the **Define Form to Show** dropdown menu.
- **Display Options:** Select a Display Option from the **Display Options** dropdown menu:
 - **Show view title when empty:** Shows the Activity View's activity title when the view has no data to display.
 - **Hide view title when empty:** Hides the Activity View's activity title when the view has no data to display.
- **Sorting Options:** Currently, two **Sorting Options** are available for Activity Views within the system, Property and Unique ID. Users can select whether to sort an Activity View by Unique ID Ascending or Descending by selecting a corresponding radio button. By default, the Unique ID Sorting Option is set to Ascending.

2. Click the **Create** button to add the Activity View to the system.
3. Repeat the above steps to add another Activity View to the system.
4. Click the **Reorder** icon, continue to hold the mouse button and drag and drop the Activity View to rearrange the Activity View order.



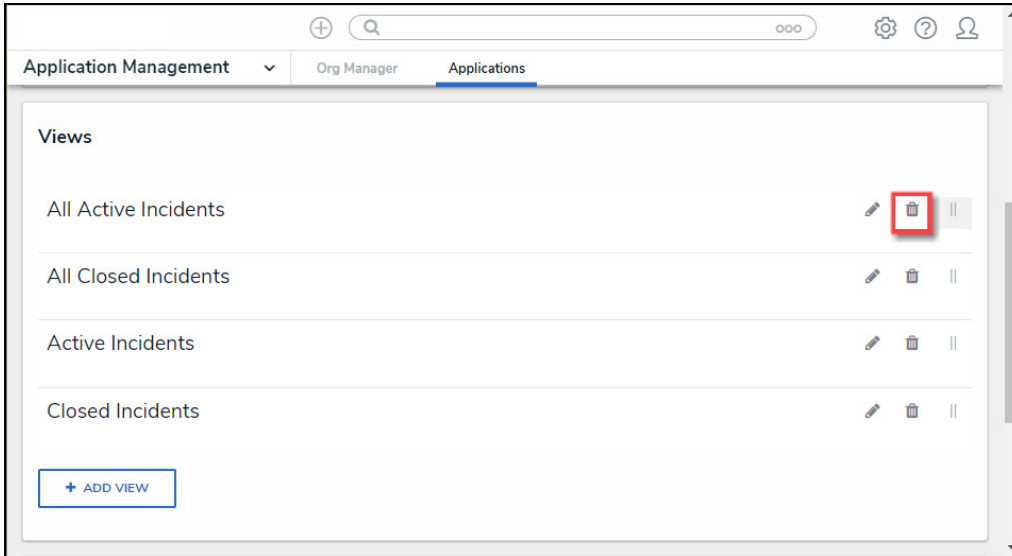
Reorder Icon

5. Click the **Edit** icon to edit an Activity View.



Edit Icon

6. Click the **Delete** icon to delete an Activity View. A **Confirmation** screen will appear. Click on the **Yes** button to delete the Activity View from the system.



Delete Icon