

Form Headers Overview

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Overview

By default, when creating a new object, each standard form has a header of Create a New [Object Type name]. Once the object is created, the header is replaced with the value entered into the Name property (i.e., the title) on the form and no description (i.e., the sub-title) is displayed. However, Administrators can configure the header settings to:

- Display a custom name for the form title and a custom description for the form description
- Allow users to make edits by clicking and typing directly into the header, or by changing the Name or Description properties (provided the appropriate Edit permissions are enabled on the user's role and the header is not marked as read-only)
- Show the object's **Unique ID** in the header to the far right of the object title

Note:

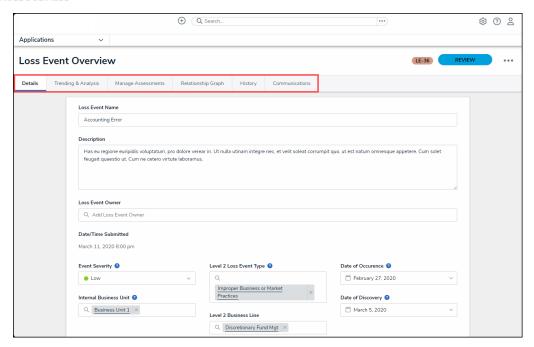
Default concatenations (i.e., automatically completed fields) on the Name and Description properties are applied when an object is created. However, any edits made to these properties after that point will override the default concatenations. Therefore, when creating customized headers with your own titles and descriptions, you should take note of any concatenations you need to ensure they're not overridden and cause reporting errors.

Header Navigation

The form features appear in the header navigation, which hosts essential object information at the top of the form. These form features include:

- Trending & Analysis: The Trending & Analysis tab shows Assessment Results.
- Manage Assessments: The Manage Assessments tab allows you to push object updates syncing the assessment with the library.
- Relationship Graph: The Relationship Graph tab shows how that object is connected to other objects.
- History: The History tab tracks all form changes and lists the details.
- Emails: The Communications tab is where the email information will appear and tracks all form email correspondence. The Email option is only visible in the Navigation, based on the Email Settings used to generate that object. Read more here: Create an Email Setting.
- Comments: The Communications tab is where the comment information will appear and tracks all form comments.





An Example of a Form Header

To create consistency and establish naming conventions – particularly as an object transitions across workflow states – objects should utilize the object name for their form title and not a custom name.