Configuring Relationships on a Form

Last Modified on 11/05/2025 2:21 pm EST

Overview

Relationships can be displayed on Forms as dropdown menus or tables, where end users can search for and/or create new objects through that relationship, depending on the element's settings. Before the relationship element can be added to a form, it must be added to the object type as a component.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Configurable Forms feature.

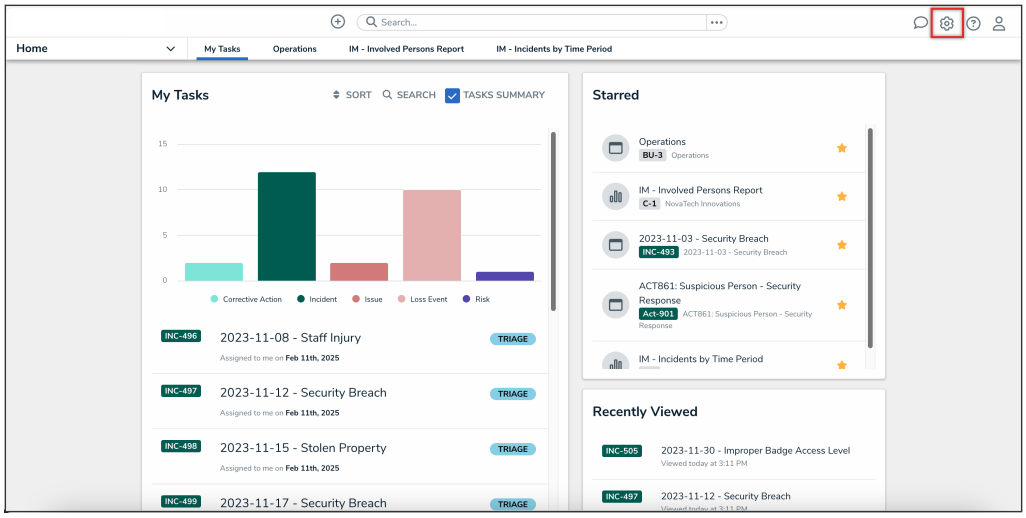
Related Information/Setup

Please refer to the Add Relationships to an Object Type article for further information on adding a Relationship to an Object Type.

Please refer to the Adding Form Elements to a Standard Form article for further information on adding a Relationship to a Form.

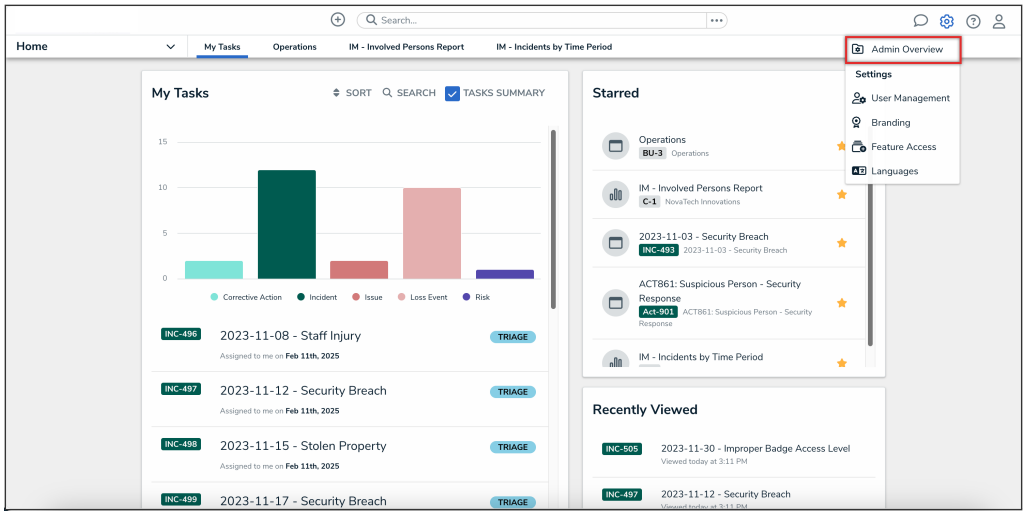
Navigation

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



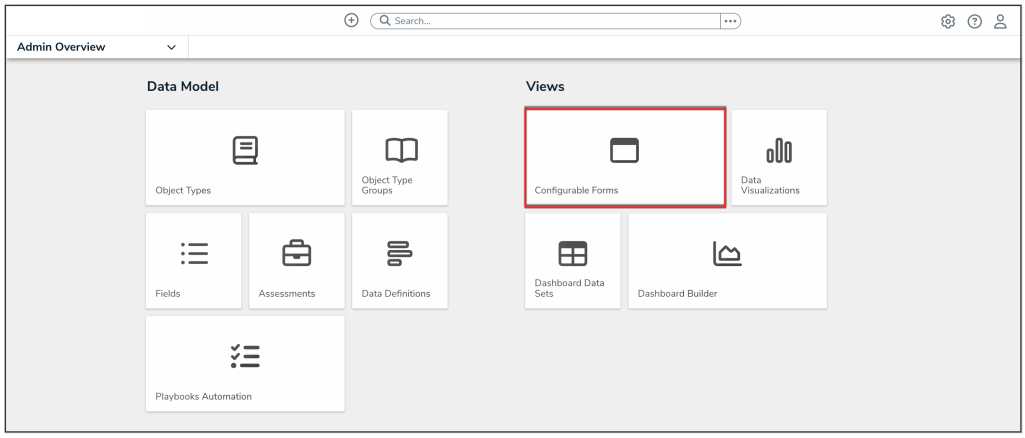
Administration Icon

2. From the **Administrator Settings** menu, click the **Admin Overview** link.



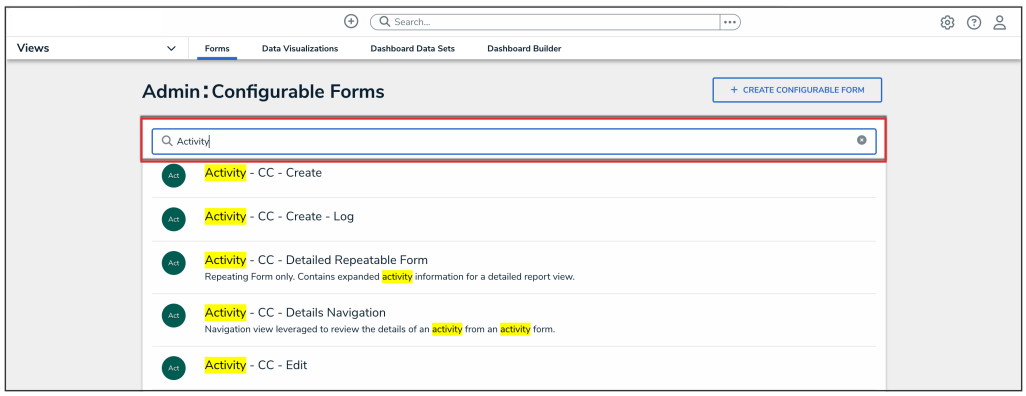
Administrator Settings Menu

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



Configurable Forms Tile

4. From the ***Configurable Forms*** screen, enter a form name in the **Search** field to narrow down the forms list.

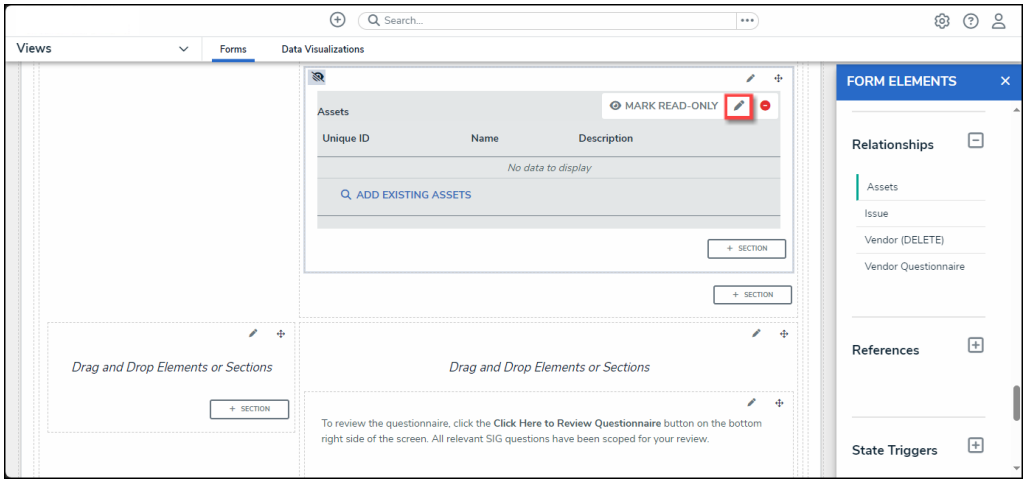


Search Field

5. Click the form that you want to edit.

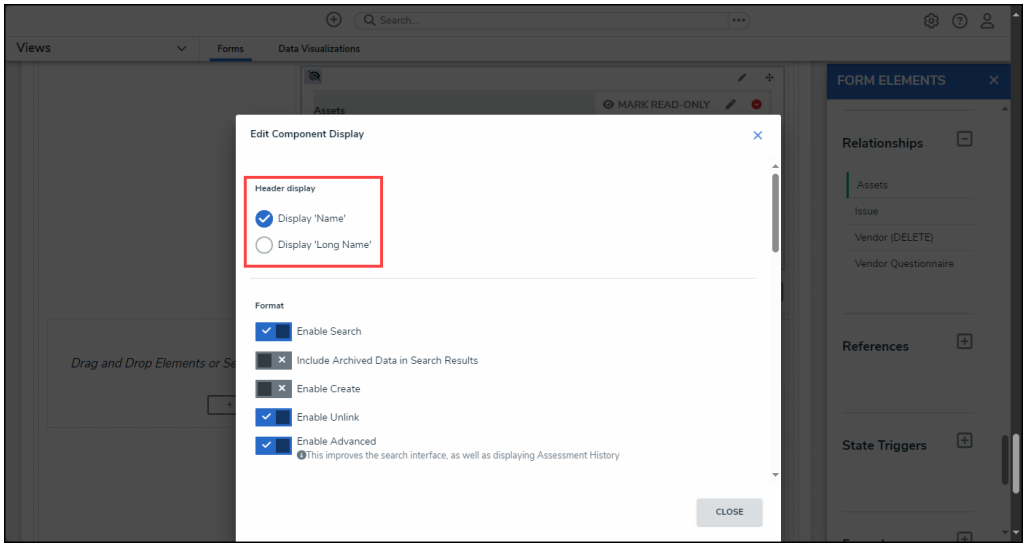
Configuring Relationships on a Form

1. From the ***Admin: Edit Configurable Form*** screen, scroll to a relationship and hover your cursor over the relationship and click the **Edit** icon.



Edit Icon

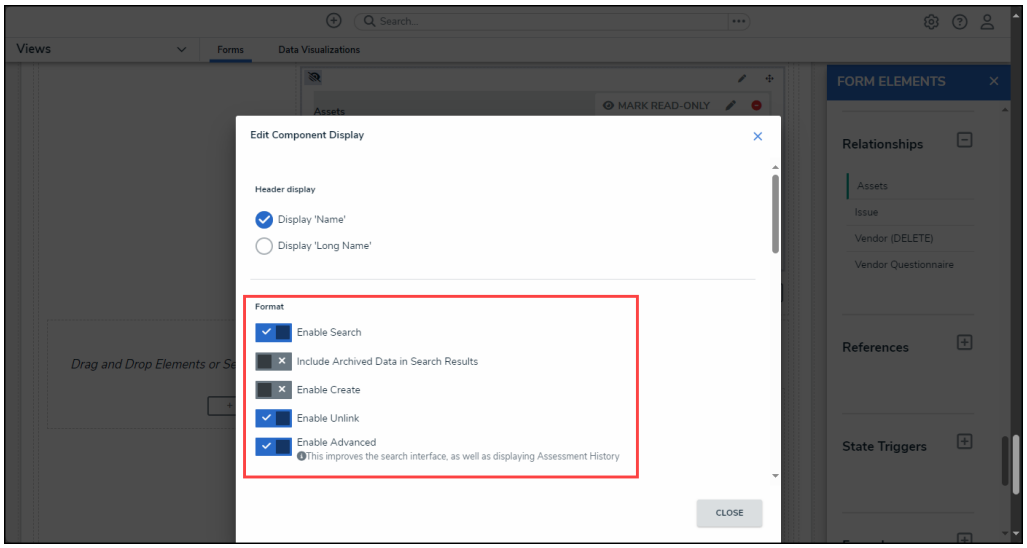
2. From the ***Edit Component Display*** pop-up, select one of the following options from the **Header Display** section:
    - **Display Name:** The **Display Name** option displays the relationship's name on the form. The **Display Name** value is pulled from the relationship's **Name** field on the ***Edit Relationship*** pop-up.
    - **Display Long Name:** The **Display Long Name** option displays the relationship's long name on the Form. The **Display Long Name** value is pulled from the **Long Name** field on the Relationship's ***Edit Relationship*** pop-up.



Display Long Name Radio Button

3. Select formatting options from the ***Format*** section:

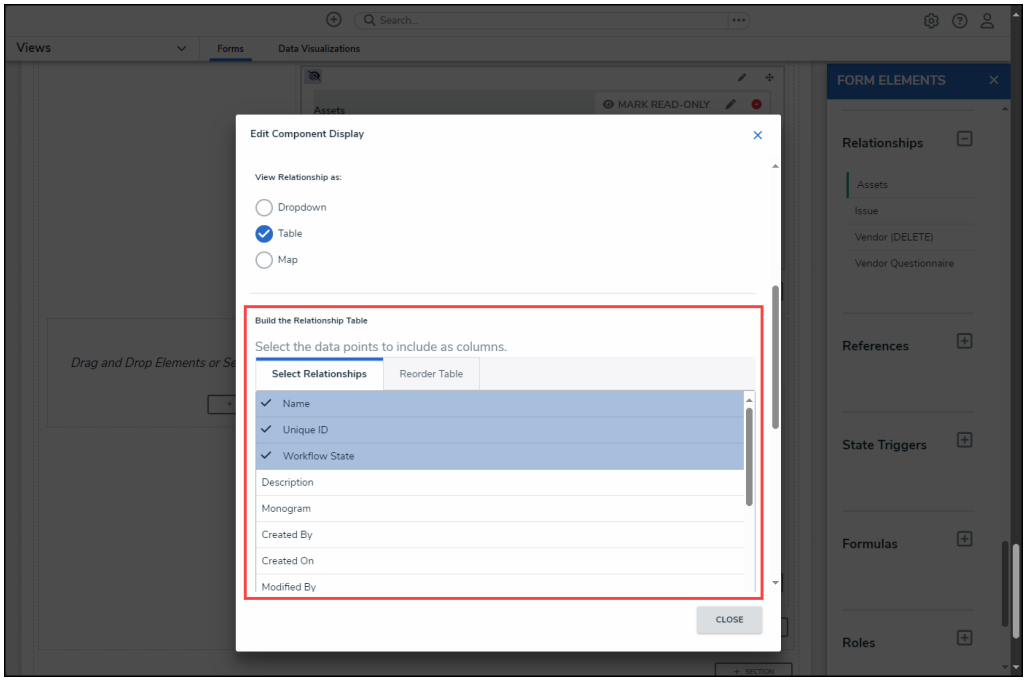
- **Enable Search:** Users can search for existing relationship objects.
- **Include Archived Data in Search Results:** Users can search for or view archived objects through the form element. This option will only be visible if the **Enable Search** option is enabled. See the Archived Data section for more information.
- **Enable Create:** Users can create new objects through the relationship.
- **Enable Unlink:** Users can remove objects from the relationship on the form and unlink them from the relationship object.
- **Enable Advanced:** Displays the advanced user interface for the form relationship. When this option is enabled, clicking **Add Existing [Object]** will open a palette that allows users to search for and select one or more objects or assessment objects (if any) to add to the relationship.



Format Section

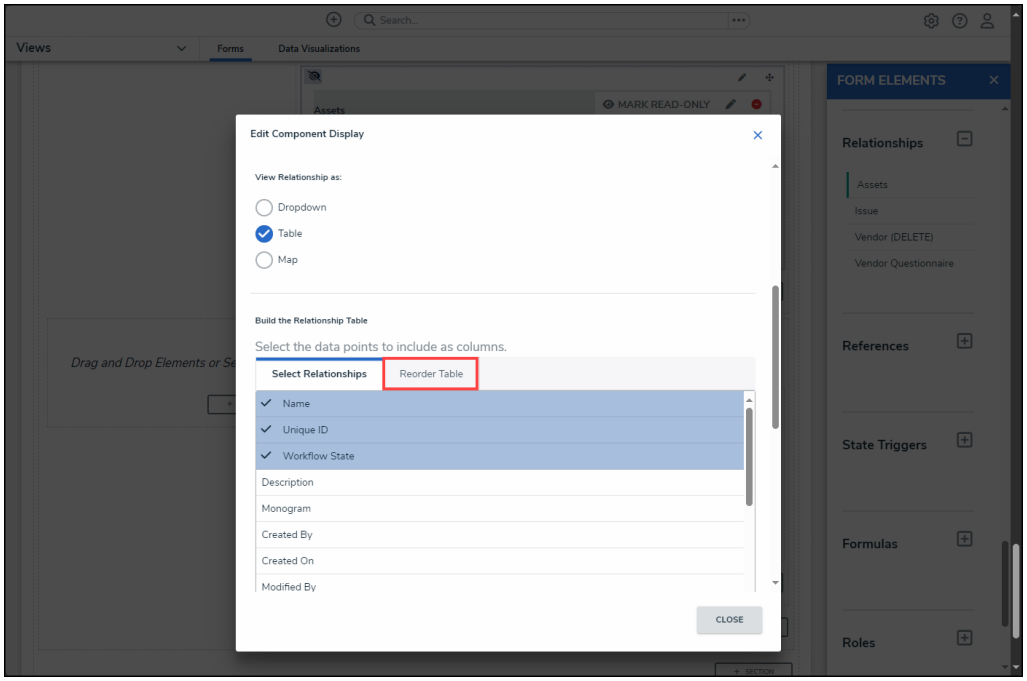
4. Select a **View Relationship as** option:

- **Dropdown:** The **Dropdown** option display the relationship as a dropdown menu. This option is selected by default.
- **Table:** The **Table** option displays the relationship as a table.
- **Build the Relationship Table:** When selecting this option, **t**he **Build the Relationship Table** section will appear. Click data points (properties and fields) from the list on the ***Select Relationship*** tab, to include them on the table as columns (e.g., if the Vehicle object type is referenced in a relationship on the Incident object type, you can display properties and fields from Incident in the table).



Build the Relationship Table Section

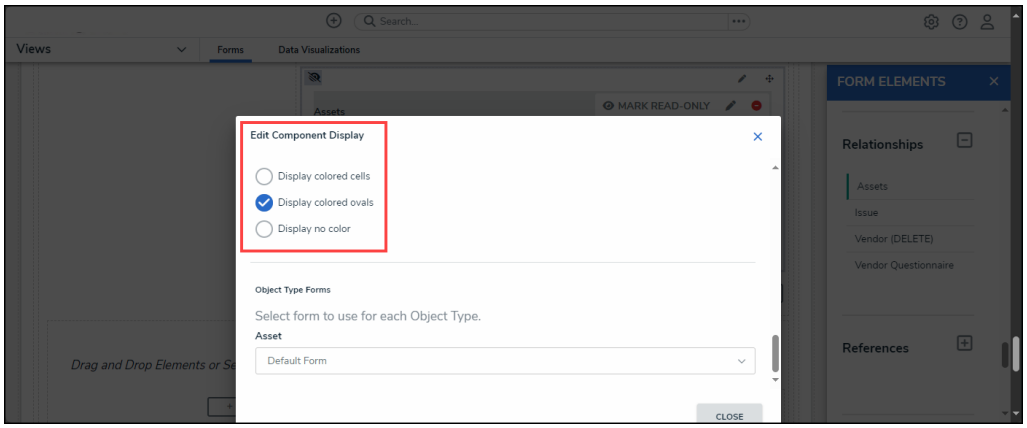
- **Reorder Table:** Click the **Reorder Table** tab and use the **Move** icon to rearrange the order of the columns as they appear on the table.
- Relationship tables with more than 1000 rows of data will not load correctly. For larger data sets, it's recommended that a Form Action element is added to a form to redirect users to view the data in a report**.**



Reorder Table Tab

- **Display:** The **Display** section will appear when selecting the **Table** option.

- **Display colored cells:** Displays formula and select list cells as text with a background color.
- **Display colored ovals:** Displays formula or select list cells as text with colored circles instead of a background color.
- **Display no color:** Displays formula and select list cells as text with no background color.

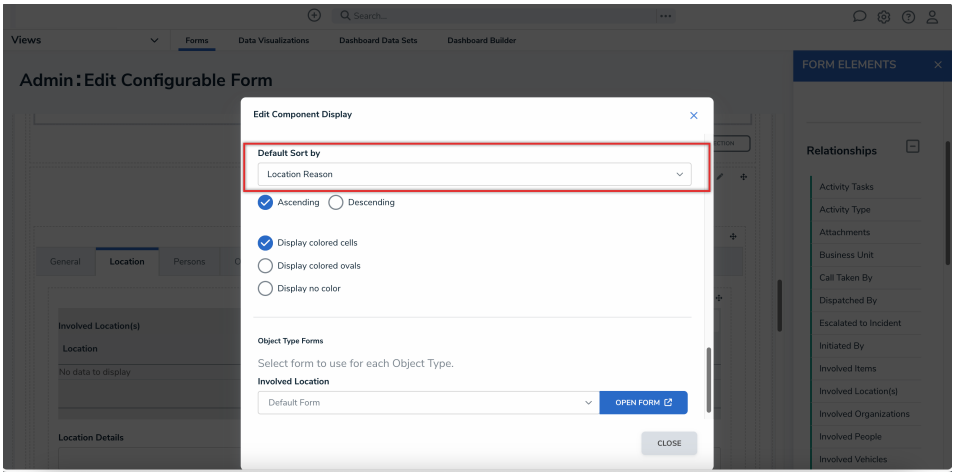


Display Options

- **Map:** The **Map** option displays the relationship as a map. This option will display a map with pins representing any recorded locations of the relationship object or reference objects. If location data is not enabled or recorded, the map will not display any data. For more information on locations, refer to the Locations section.

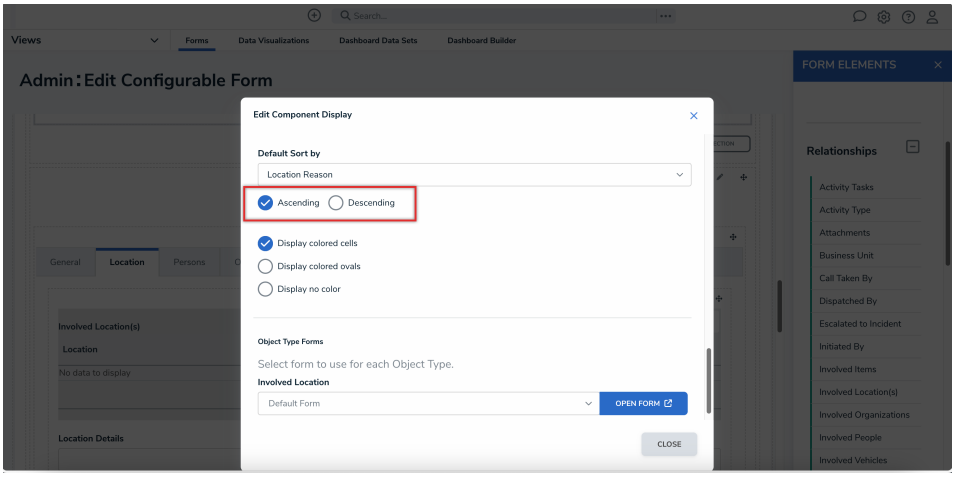
> ***Note:***
> *Selecting the **Map** option disables the **Enable Create** and **Enable Advanced** format options.*

5. From the **Default Sort By** drop-down menu, choose which column you want to have the table default sort by.



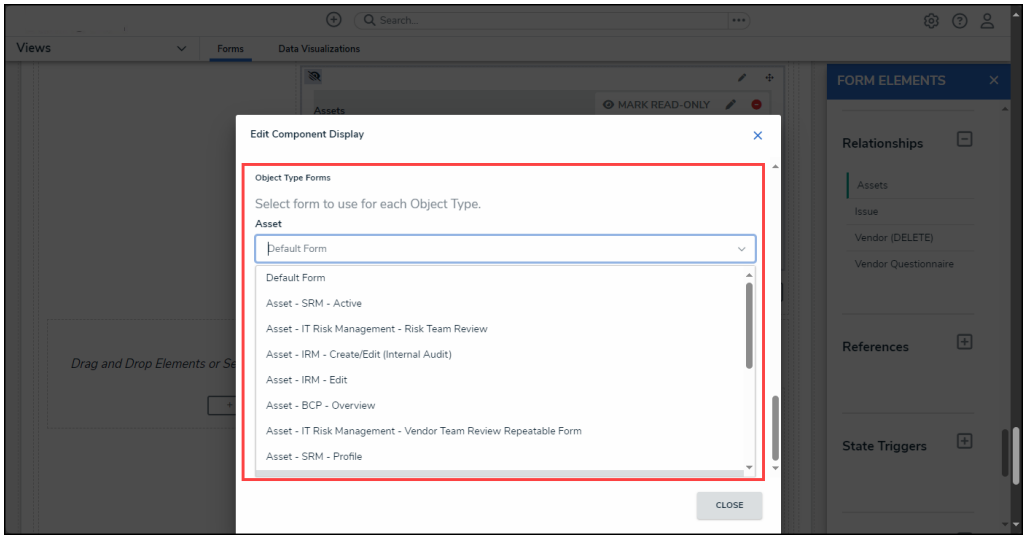
Default Sort By Dropdown Menu

6. Select **Ascending** or **Descending** to choose which sort order the columns will appear as.



Ascending or Descending

7. The **Object Type Forms** section will appear when selecting either the **Dropdown** or **Table** options under the **View Relationship as** section. Select the form the users will complete from the dropdown list.



Object Type Forms Dropdown

> ***Note:***
> *If no configurable form(s) have been created for the relationship's object type(s), the default form will be selected automatically.*

6. Click the **Close** button when finished.