

Configure a Standard Form Header

Last Modified on 09/12/2025 3:44 pm EDT

Overview

Administrators can configure the following form's header settings:

- Display a **Custom Name** and a **Custom Description**.
- Allow end-users to edit the **Name** or **Description** properties (provided the appropriate [Edit permissions](#) are enabled, and the header is not marked as read-only).
- Show the object's **Unique ID** in the header.

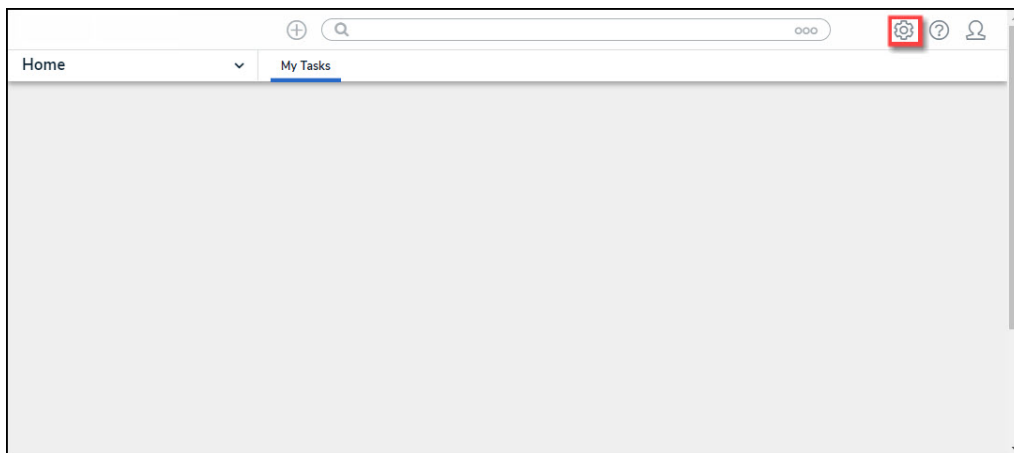
Related Information/Setup

For more information on Form Headers see the Forms Header Overview article.

- [Forms Header Overview](#)

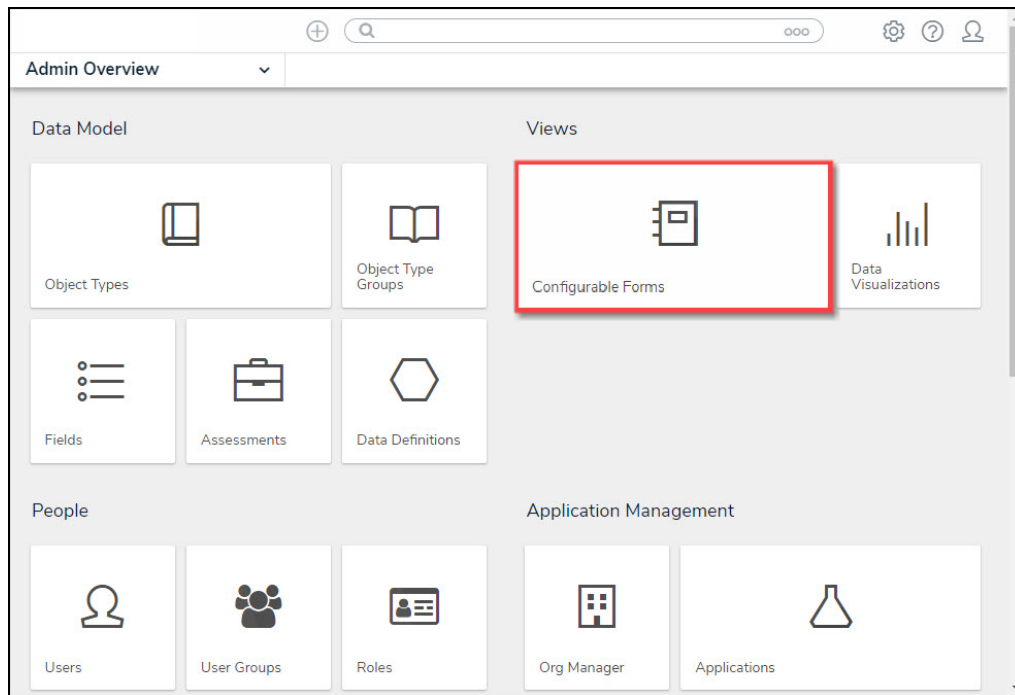
Navigation

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



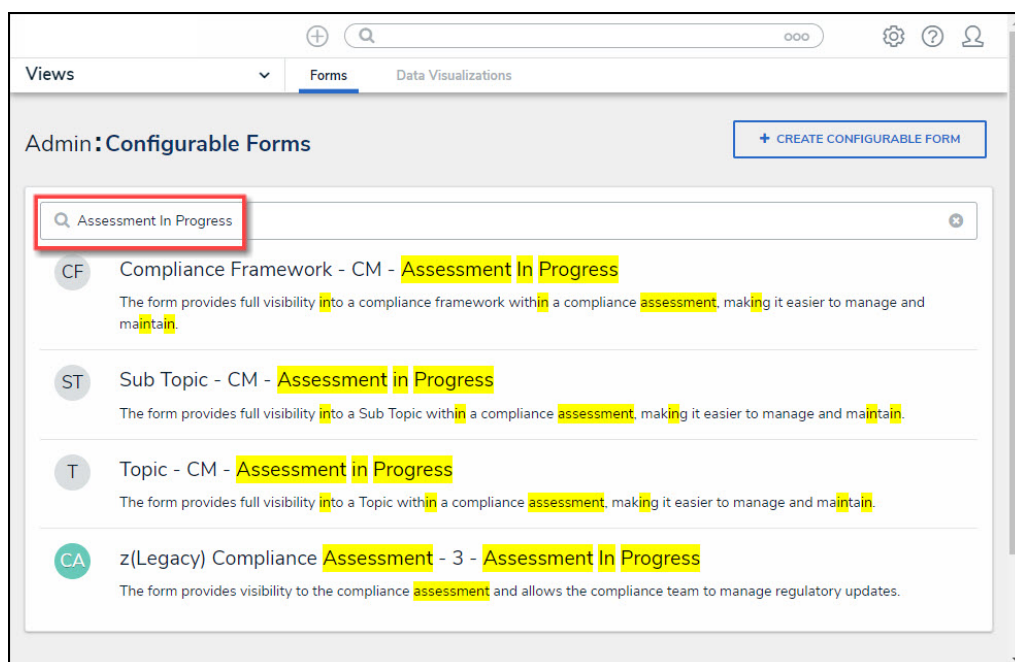
Administration Icon

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



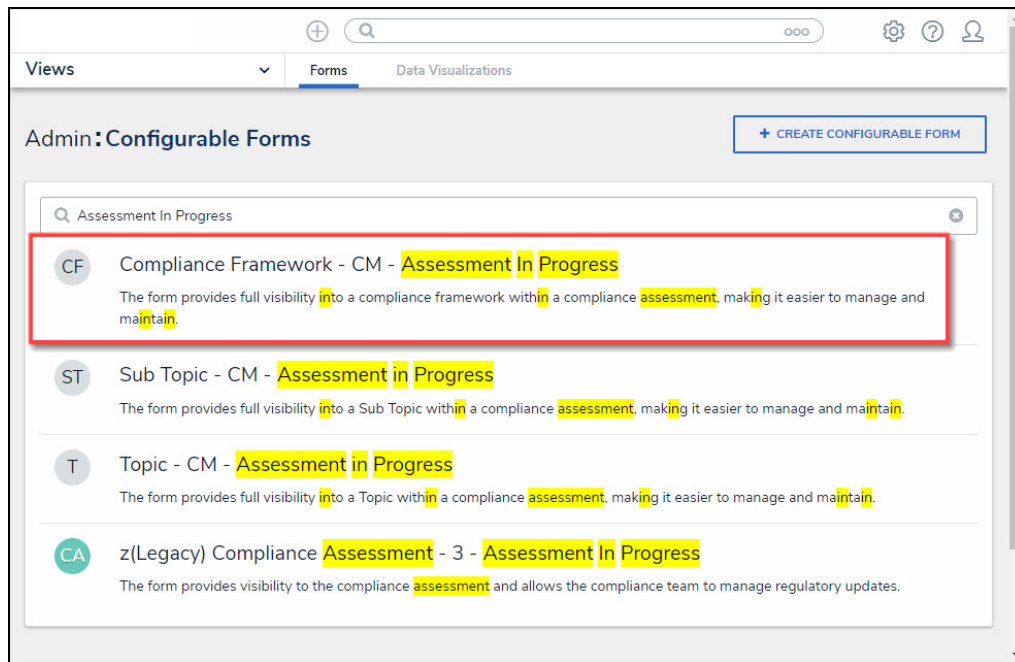
Object Types Tile

- From the **Admin: Configurable Forms** screen, enter a keyword in the **Search** field to narrow down the forms list.



Search Field

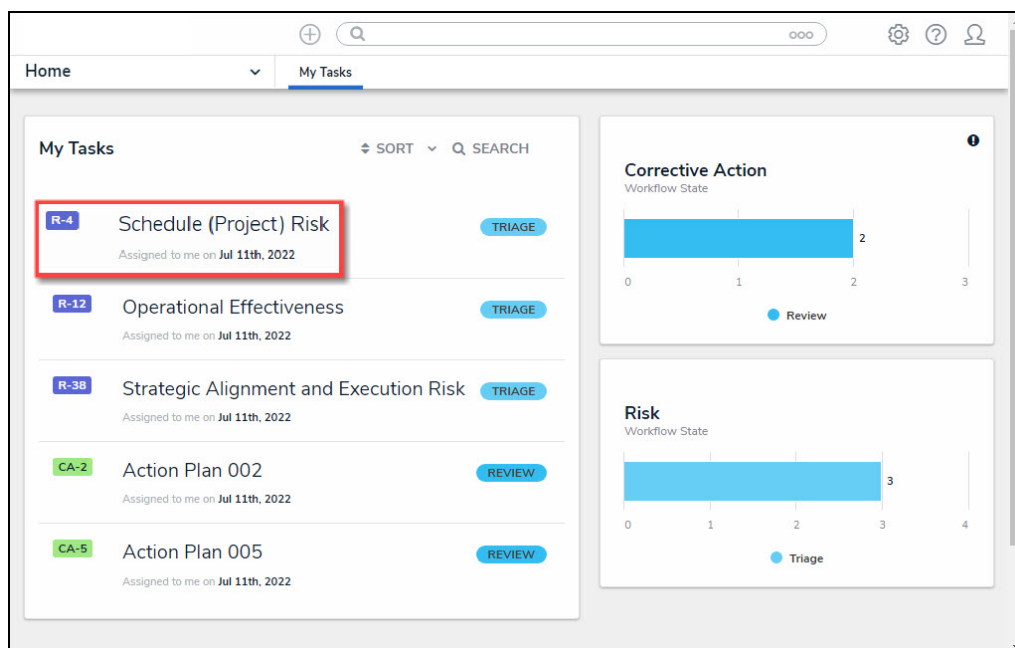
- Click on the **Name** of the form you want to configure.



Select a Form Name

Alternate Navigation

1. From the **Home** screen, select a **Task** from the **My Tasks** list.



My Tasks List

2. From the **Form** screen, click the **Options** icon and select **Edit Form Template** from the drop-down list.

Options Icon

Configure a Standard Form Header

1. From the **Admin: Edit Configurable Forms** screen, click the **Edit** icon on the **Form Header** section.

Edit Icon

2. From the **Edit Header** pop-up, select a **Form Title** radio button:
 - **Object Name:** The Object's Name property value.
 - **(Optional) Read only:** The **Read only** toggle switch will appear when the **Object**

Name radio button is selected. The toggle marks the form title as read-only, preventing users with **Edit** permissions enabled from modifying the title.

- **Custom Name:** The Object's name-value pulls from the **Form Title** field, which appears below the **Custom Name** radio button.

Edit Header Section

Form Title

☒ Object Name ☐ Custom Name

☒ Read only

Form Description

☐ Object Description ☒ Custom Description ☐ None

Description

The following compliance framework being assessed. Review the reports below to understand the status of the requirements, issues, and actions that pertain to the compliance assessment.

Add to Header

☒ Unique ID

☒ Workflow State

☒ Workflow State ☐ Workflow Control

DONE

Form Features Section

3. Select a **Form Description** radio button:

- **Object Description:** Uses the form subtitle as the Object's description.
 - **(Optional) Read only:** The **Read only** toggle switch will appear when the **Object Description** radio button is selected. The toggle marks the description as read-only, preventing users with **Edit** permissions enabled from modifying the title.

The screenshot shows the 'Edit Header Section' dialog in the Resolver application. The dialog has a title bar with a close button. It contains several sections: 'Form Title' with radio buttons for 'Object Name' and 'Custom Name' (selected), a text field for 'Form title' containing 'Compliance Requirement - Assessment In Progress', 'Form Description' with radio buttons for 'Object Description' (selected), 'Custom Description', and 'None', a 'Read only' checkbox (checked), 'Add to Header' with checkboxes for 'Unique ID', 'Workflow State', and 'Workflow Control' (selected), and 'Form Features' with a text field containing 'Trending & Analysis'. A 'DONE' button is at the bottom right. A red box highlights the 'Form Description' section.

Form Description = Object Description

- **Custom Description:** Uses the subtitle assigned to all Objects created through the form. End-users cannot edit this option.
 - **Description:** The **Description** field will appear when the **Custom Description** radio button is selected. The **Description** field will display the Custom Description.

The screenshot shows the 'Edit Header Section' dialog box in the Resolver application. The dialog is titled 'Edit Header Section' and has a close button (X) in the top right corner. It contains the following sections:

- Form Title:** Two radio buttons are present: 'Object Name' (unselected) and 'Custom Name' (selected). Below them is a text input field containing 'Compliance Requirement - Assessment In Progress'.
- Form Description:** Three radio buttons are present: 'Object Description' (unselected), 'Custom Description' (selected), and 'None' (unselected). Below them is a text area containing the text: 'The following compliance framework being assessed. Review the reports below to understand the status of the requirements, issues, and actions that pertain to the compliance assessment.' This section is highlighted with a red border in the image.
- Add to Header:** Three checkboxes are present: 'Unique ID' (checked), 'Workflow State' (checked), and 'Workflow Control' (unchecked).

A 'DONE' button is located at the bottom right of the dialog.

Form Description = Custom Description

- **None:** No subtitle appears on the form.

Edit Header Section

Form Title

☐ Object Name ☒ Custom Name

Form title

Compliance Requirement - Assessment In Progress

Form Description

☐ Object Description ☐ Custom Description ☒ None

Add to Header

☒ Unique ID

☒ Workflow State

☒ Workflow State ☐ Workflow Control

Form Features

Trending & Analysis

Manage Assessments

DONE

Form Description = None

4. Select **Add Header** options:

Edit Header Section

Add to Header

☒ Unique ID

☒ Workflow State

☒ Workflow State ☐ Workflow Control

Form Features

Trending & Analysis

Manage Assessments

☒ Relationship Graph

☒ History

Emails

DONE

Add Header Options

- **Unique ID:** Includes the Object Type's Unique ID on the Form Header. The Unique ID is a unique identifier automatically assigned to the Object Type at creation.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The main content area displays a form titled 'Compliance Framework - CM - Assessment In Progress'. Below the title, there is a description: 'The form provides full visibility into a compliance framework within a compliance assessment, making it easier to manage and maintain.' and the object type 'Compliance Framework'. The 'Form Layout' section shows three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Compliance Requirement - Assessment In Progress' card is highlighted with a red box, showing the unique ID 'CF-123'.

Unique ID Enabled

- **Workflow State:**
 - **Workflow State (Radio Button):** Includes the Object Type's current state on the Form Header.

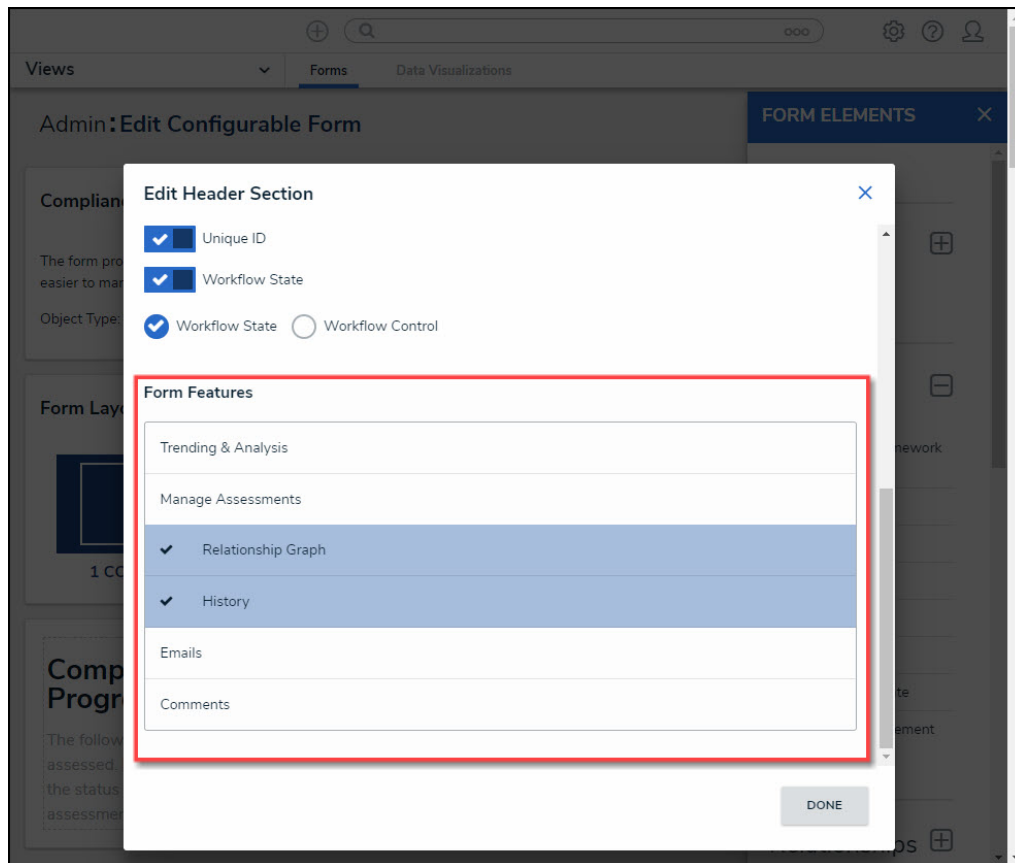
The screenshot shows the 'Admin: Edit Configurable Form' interface. The main content area displays a form titled 'Compliance Framework - CM - Assessment In Progress'. Below the title, there is a description: 'The form provides full visibility into a compliance framework within a compliance assessment, making it easier to manage and maintain.' and the object type 'Compliance Framework'. The 'Form Layout' section shows three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Compliance Requirement - Assessment In Progress' card is highlighted with a red box, showing the 'CREATION' workflow state.

Workflow State Enabled

- **Workflow Control (Radio Button):** Includes the Object Type's current state and triggers on the Form Header. You can separate workflow triggers from other Action buttons within the form. Clicking the Workflow Control allows you to create a customized list of triggers available to an object's current workflow. See the [Enable Workflow Control on a Form](#) article for more information on Workflow Controls.

Workflow Control Enabled

5. **(Optional)** Select **Form Features** by clicking on the **Form Feature Name**. A checkmark next to the **Form Feature** indicates that the **Form Feature** is active. **Form Features** modify the available options when viewing a form.
 - **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 **Communication** tab is where the email information will appear and tracks all form email correspondence.
 - **Comments:** The **Communication** tab is where the comment information will appear and tracks all form comments.



Form Features Section

6. **(Optional)** From the **Assessment Results Table** select list, you can add formulas to be listed as tables, such as:
 - **Residual Risk Score:** Residual Risk Score measures the remaining risk after considering the effects of the controls.
 - **Control Effectiveness:** Control Effectiveness measures effectiveness of the controls used to mitigate a risk.
 - **Inherent Risk Score:** Inherent Risk Score measure a risk in the absences of controls.
7. Click the **Done** button to save your changes.