

Open a Form Action

Last Modified on 04/19/2022 11:21 am EDT

The **Open a Form** action allows end users to open a related standard form from within an existing object. For example, if the Open a Form action was added to a form for the Incident object type, a user viewing an existing incident object could click the "Witness Statement Form" action button to view, complete, or print the Incident Witness Statement form, then click Done to return to the originating object.

Incident Review

IC/Theft 2016/10/20

Enter the type of Incident, your initials and the date the incident was created in the Name field below.
For example, EL/Hazard 2016/10/26

Incident Name
IC/Theft 2016/10/20

I-12

Incident
Draft

Select the employee who created the initial report.

Incident Report Writer
Wendy Marx

Were there any witnesses? If yes, complete and submit a Witness Statement form.

Yes

WITNESS STATEMENT FORM

Incident Review

IC/Theft 2016/10/20

I-12

Created By
Eva Luckett

Created On
2016-10-20

Date & Time the Incident Occurred
September 18, 2017 8:10 am

Employee?
No

What Happened?
The witness saw the suspect swipe the iPhone off the table in the cafeteria and leave out th to the witness, the suspect was wearing a brown jacket, jeans, and runners and was a Cauc height.

People Involved

Interviews

Clicking on a form action button on an existing object will open a related form. In this case, clicking the Witness Statement Form button will open the Statement form.

To add the Open a Form action to a standard form:

1. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select a form.
2. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
3. Drag and drop the **Open a Form** element to the canvas, which will automatically display the **Add Component** screen.



The **Open a Form** action should only be added to standard forms for existing object types. Read more here: [Form Actions Overview](#).

4. Enter text to display on the clickable button in the **Button Text** field.
5. Select a form from the **Form** dropdown menu. You can only select forms related to the current configurable form's object type.

Add Component

Button Text

Witness Statement Form

Form

Incident Witness Statement

SAVE

CANCEL

The Add Component screen for the form action element.

6. Click **Save** to return to the canvas.
 7. To edit the action, hover your cursor over the element on the canvas, then click the  icon.
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