

# Create a Navigation Form

Last Modified on 09/17/2025 9:40 am EDT

## Overview

A [navigation form](#) is a configurable form that provides visual context for objects and assessments and helps users understand how each object relates to one another.



**Note:**

*Data grids are not currently supported in navigation forms.*

## User Account Requirements

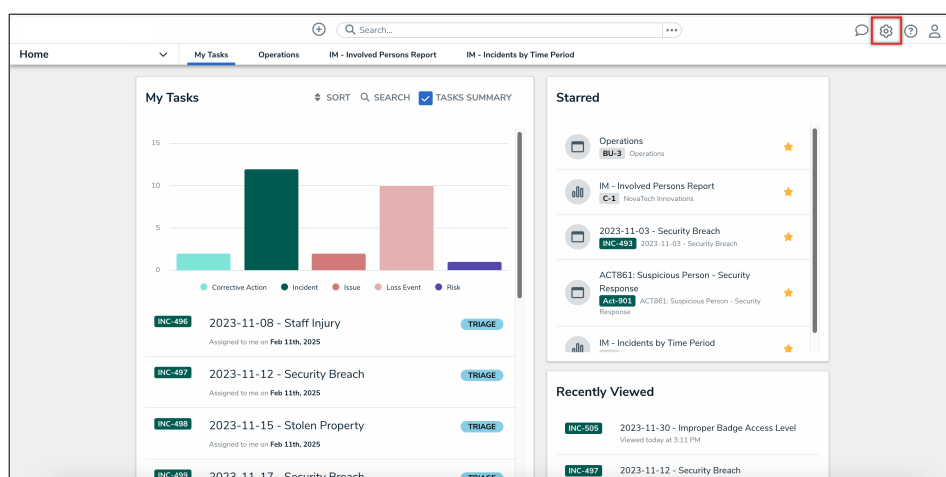
The user must have Administrator permissions in order to access the **Admin Overview** section.

## Related Information/Setup

Please refer to the [Navigation Form Overview](#) article for more information on using navigation forms.

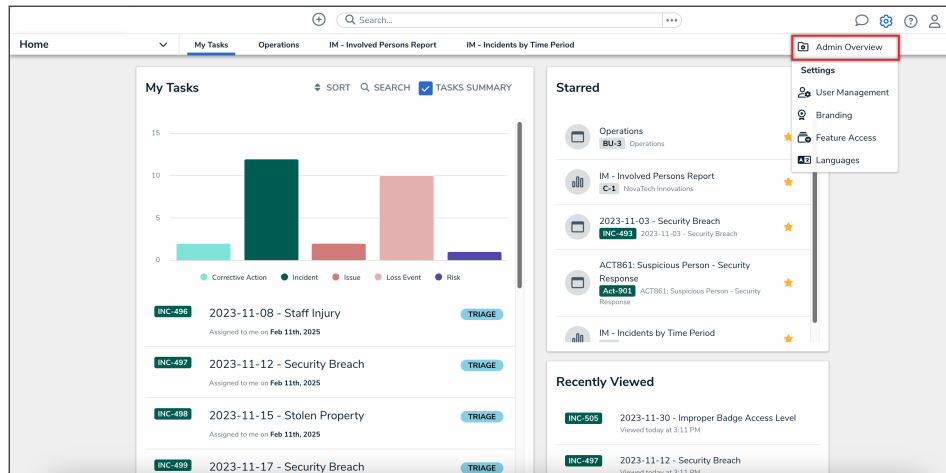
## Navigation

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



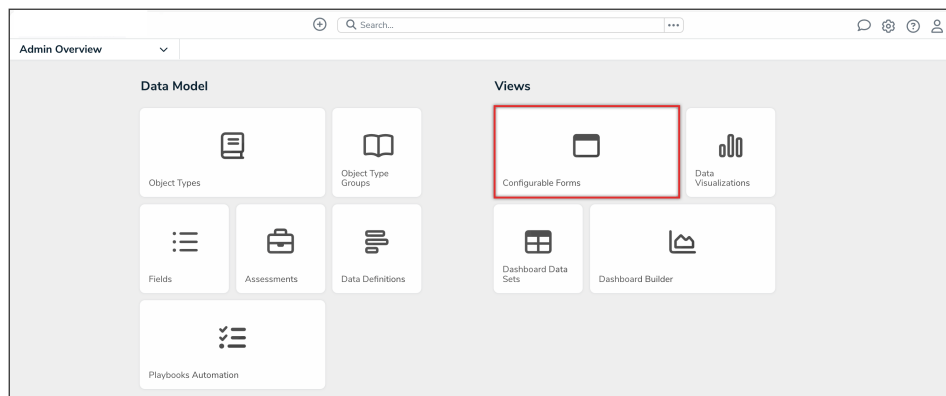
*Administration Icon*

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



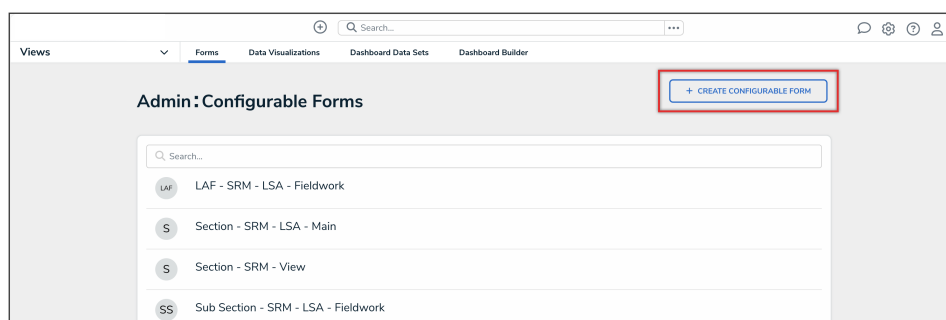
*Administrator Settings Menu*

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



*Configurable Forms Tile*

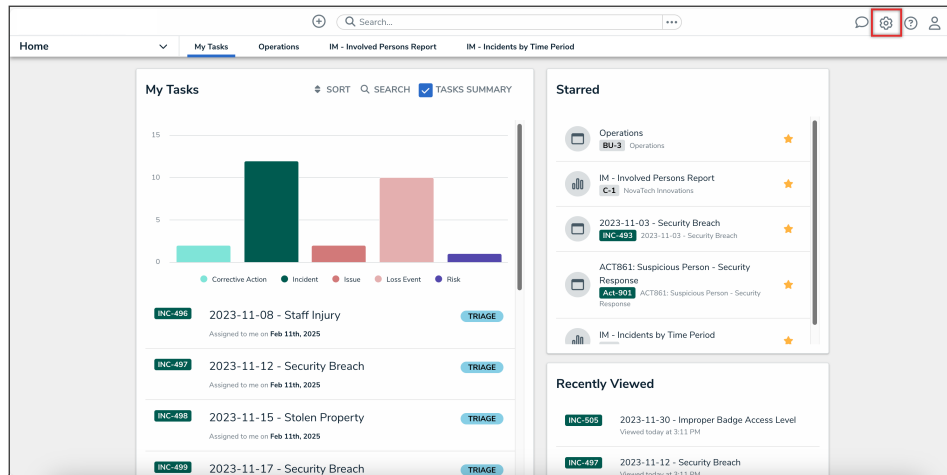
- From the **Admin: Configurable Forms** screen, click the **Create Configurable Form** button.



*Create Configurable Form Button*

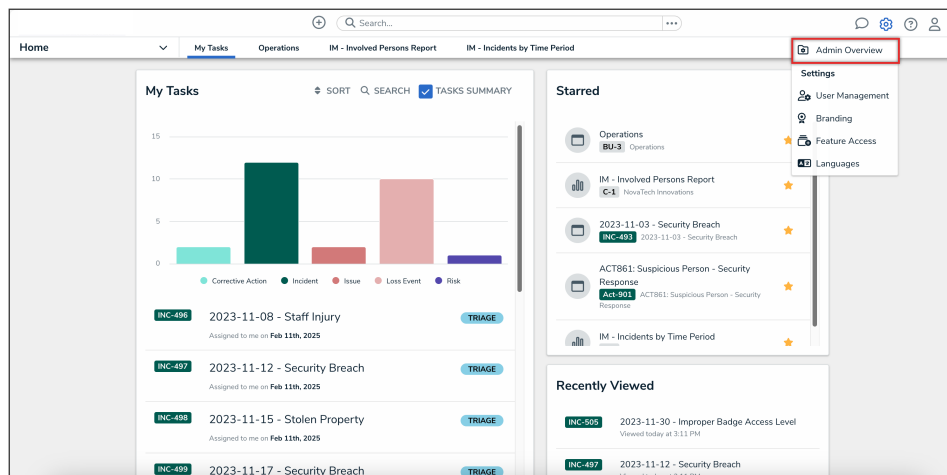
## Alternate Navigation

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



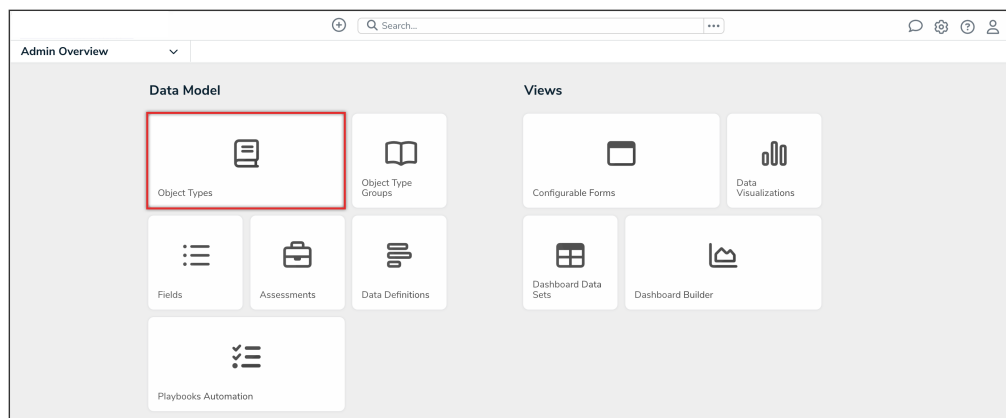
*Administration Icon*

- From the **Administrator settings** menu, click the **Admin Overview** link.



*Administrator Settings Menu*

- To create a form from an object type, from the **Admin Overview** screen, click the **Object Types** tile in the **Data Model** section.

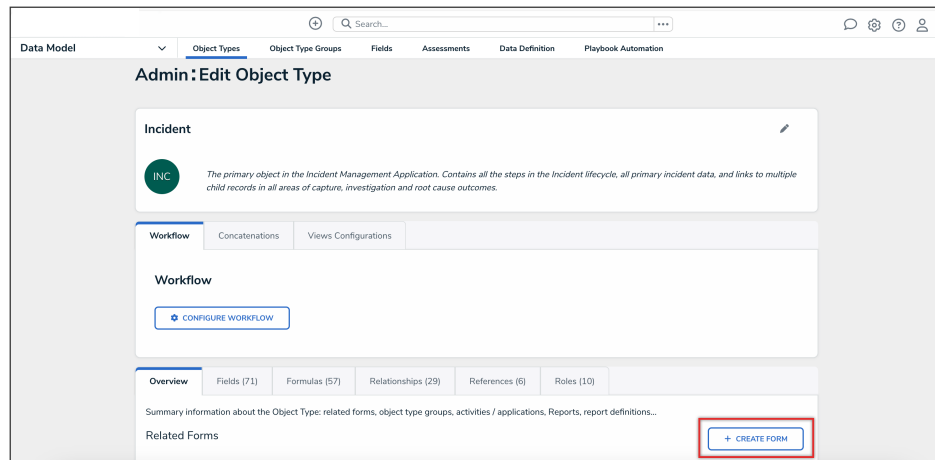


*Object Types Tile*

- On the **Admin: Object Types** screen, from the list of object types, click the object

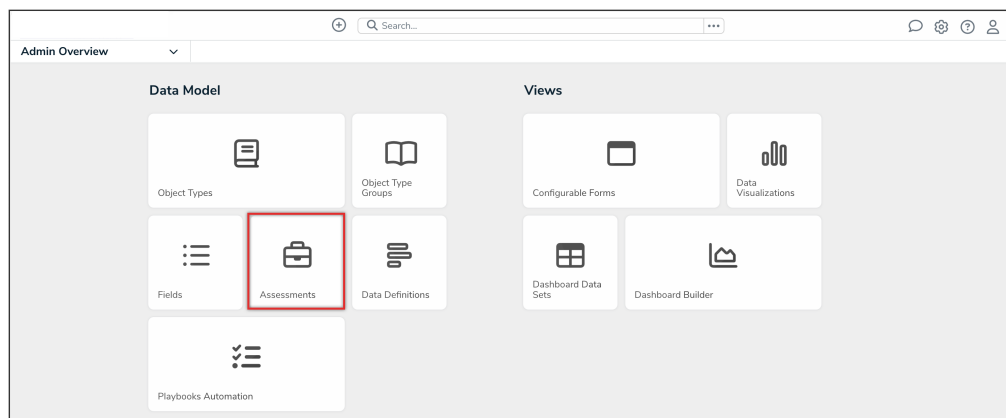
type that you want to create a form from.

- b. On the **Admin: Edit Object Type** screen, from the **Overview** tab, click the **Create Form** button.



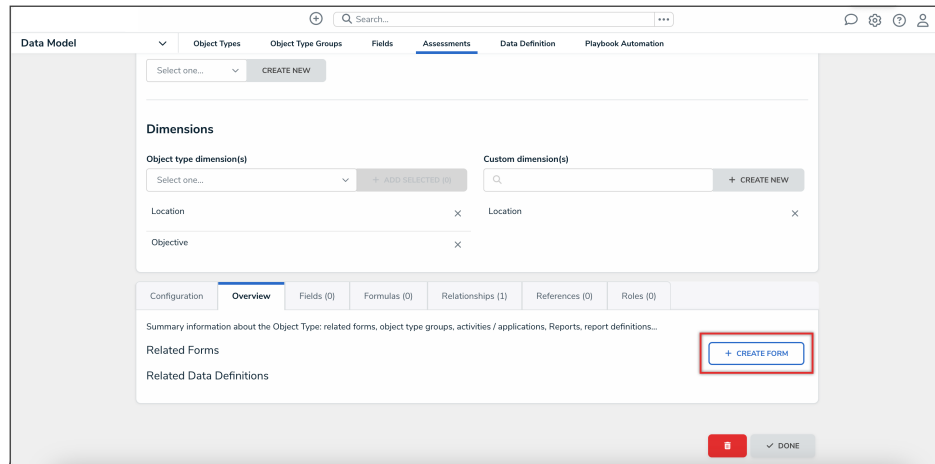
*Create Form Button*

4. To create a form from an assessment, from the **Admin Overview** screen, click the **Assessments** tile in the **Data Model** section.



*Assessments Tile*

- a. On the **Admin: Assessments** screen, from the list of assessments, click the assessment that you want to create a form from.
- b. On the **Admin: Edit Assessment** screen, from the **Overview** tab, click the **Create Form** button.



*Create Form Button*

## Creating a New Navigation Form

1. From the **Admin: Create Form** screen, enter the name of the form in the **Name** field.

*Name Field*

2. **(Optional):** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form.

The screenshot shows the 'Admin: Create Form' page in the Resolver application. The page has a top navigation bar with 'Views', 'Forms', 'Data Visualizations', 'Dashboard Data Sets', and 'Dashboard Builder'. The 'Forms' tab is active. The main content area contains a form with the following fields: 'Name' (with 'Incident Form' entered), 'Description' (highlighted with a red border), 'Form Type' (with 'Select one...' selected), and 'Data Definition' (with 'Select one...' selected). There are 'CANCEL' and 'CREATE' buttons at the bottom right.

*Description Field*

3. Select **Navigation Form** from the **Form Type** dropdown menu.

The screenshot shows the 'Admin: Create Form' page. The 'Form Type' dropdown menu is highlighted with a red border and shows 'Navigation Form' selected. The 'Description' field is now empty. The 'Data Definition' field remains 'Select one...'. The 'CANCEL' and 'CREATE' buttons are still present.

*Form Type Dropdown*

4. Select a data definition from the **Data Definition** dropdown menu. This will determine which objects will appear in the tree on the form. If a user doesn't have permission to view an object, that object and any others below it in the tree will not be visible. See [Data Definitions](#) for more information.



**Note:**

*When creating a form from an object type or assessment, the available data definitions will be filtered to the selected object type.*

The screenshot shows the 'Admin: Create Form' page in the Resolver application. The page has a top navigation bar with 'Views', 'Forms', 'Data Visualizations', 'Dashboard Data Sets', and 'Dashboard Builder'. The 'Forms' tab is active. The main form area contains fields for 'Name' (Incident Form), 'Description', 'Form Type' (Navigation Form), and 'Data Definition' (Select one...). The 'Data Definition' dropdown is highlighted with a red box. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

*Data Definition Dropdown*

- Click the **Create** button.

This screenshot shows the same 'Admin: Create Form' page. The 'Data Definition' dropdown now shows 'Incident' as the selected option. The 'CREATE' button at the bottom right is highlighted with a red box.

*Create Button*

- To include archived data in the tree view, click the **Include Archived Data** checkbox.

The screenshot shows the 'Admin: Edit Navigation Form' page. The form displays 'Name Test', 'Object Type: Regulator', and 'Data Definition: Regulator, Authority Document'. Below this, the 'Include Archived Data' checkbox is highlighted with a red box. At the bottom, there is a tree view showing 'Regulator' and 'Authority Document' nodes. At the bottom right, there are 'DONE' and 'DONE' buttons.

*Include Archived Data Checkbox*

- Click the first object type in the tree (this is the anchor object type) to configure it.

### *Anchor Object Type*

8. Select either **Form** or **Data Visualization** to choose what's displayed to a user (a standard form or report) when they click an object type node in the tree.

- If you selected **Form**:
  - a. Select a form for the object type from the dropdown.

### *Object Type Form*

- b. **(Optional):** Deselect the **Use this form for all workflow states** checkbox if you wish to specify which form to display for each state in the object type's workflow. If you deselected this checkbox, select a form from the dropdown.

*Use This Form for all Workflow States Checkbox*

- If you selected **Data Visualization**:
  - a. Choose a report for the object type from the **Select a data visualization to render** dropdown.

*Object Type Data Visualization*



**Note:**

*If you do not select a specific form or report to display, any form selected in the object type's workflow permissions for its current state will display by default.*



**Warning:**

*It's recommended that **repeatable form** reports are not added to navigation forms as doing so may cause performance issues, depending on the amount of data displayed in the form or report.*

9. Continue clicking through each object type in the tree to choose which form or report is displayed to the user.
10. Click the **Done** button to save your changes.

The screenshot shows the 'Admin: Edit Navigation Form' interface in the Resolver application. The top navigation bar includes 'Views', 'Forms', 'Data Visualizations', 'Dashboard Data Sets', and 'Dashboard Builder'. The main content area is titled 'Name Test' and shows the configuration for the 'Regulator' object type. It includes a tree view with 'Regulator' and 'Authority Document' nodes. The 'Regulator' node is selected, and the 'Data Visualization' option is chosen under the 'Regulator' section. A 'DONE' button is visible at the bottom right of the configuration area.

*Done Button*

Once the form is successfully created and configured, it can be added to a [view](#), the [Messaging action in a workflow](#), or when clicking an object on the [My Tasks](#) page.