

Enable an Assessment Table on a Form

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Previous assessment data is displayed in an **assessment table** on a standard form. The assessment table's data is pulled from the five most recently modified instances of the object currently displayed on the form, helping users better understand how data has changed over time and across different assessments.

This table is enabled in the standard form's settings for a plain text, numeric, select list, formula, or date and time [field element](#). To define what data displays in the form, administrators select data from the object type and assessments (properties, fields, dimensions, raw data [the numeric data of a select list] and trending data).

Users can click on data in this table to display the instance form in a palette, using either its default form, or one selected in the object type's [workflow permissions](#). If a user doesn't have permission to view the instances, they will not appear in the table.

For example, with the assessment table enabled on a Risk object type form, opening that form for Risk 3 (e.g., R-3) will display the name and business units from the assessments that created the instances. Clicking data in a cell will open the related instance in a palette (e.g., R-3.1, R-18), allowing you to review how that risk is being assessed across the organization.

The screenshot displays a 'RISK REVIEW' form. On the left, there's a sidebar with 'Inherent Likelihood' (Possible), 'Inherent Impact' (Low), and 'Velocity' (High). The main area features an 'Assessment Name' table with columns for 'Assessment Name' and 'Business Unit'. The table lists five entries: Risk 41 (No Value), Risk 82 (Hyderabad), Risk 43 (Hyderabad), Risk Assessment 36 (No Value), and Risk Assessment 36 (No Value). Below the table is a 'Consequences' section with a text area containing placeholder text. On the right, a 'Risk Assessment' palette is open for instance 'R-3.18'. It shows the 'Risk Name' as 'Lack of social events', a 'Description' with placeholder text, and two gauge charts for 'Inherent Risk Score' (Medium) and 'Residual Risk Score' (High). The palette also includes sections for 'Risk Owner', 'Objectives', and 'Processes'.

Assessment Name	Business Unit
Risk 41	No Value
Risk 82	Hyderabad
Risk 43	Hyderabad
Risk Assessment 36	No Value
Risk Assessment 36	No Value

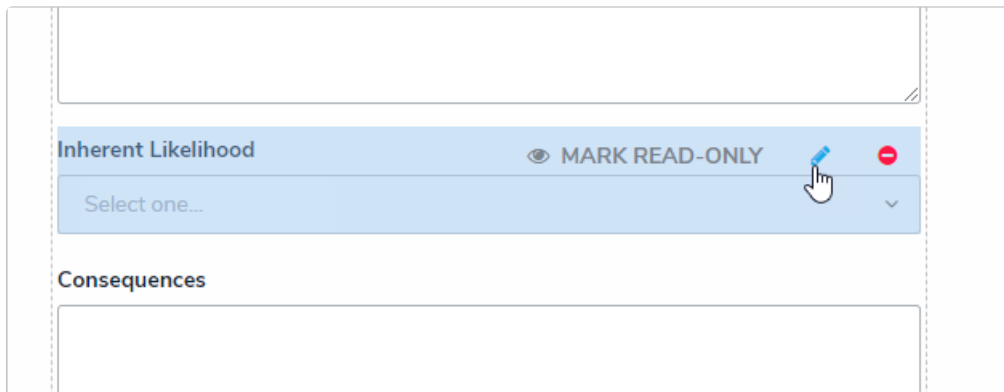
An example of the assessment table displaying an instance in a palette.

To enable the assessment table on a standard form:

1. If the form is not already open, click the icon in the top bar > **Configurable Forms** > **Views** section, then select a form.
2. If the field has not already been added:
 - a. Click the icon in the **Fields** section of the **Form Elements** palette to expand it.
 - b. Drag and drop a plain text, numeric, select list, formula, or data and time field to the

canvas. Read more here: [Fields on Forms](#) and [Add Fields to an Object Type](#).

3. Hover your cursor over the field, then click the  icon to display the **Edit Component Display** screen.



The screenshot shows a form canvas with a field titled "Inherent Likelihood". Below the title is a dropdown menu with the text "Select one...". To the right of the dropdown is a button labeled "MARK READ-ONLY" with an eye icon. A hand cursor is hovering over the "MARK READ-ONLY" button. Below the dropdown is another field titled "Consequences".

Hovering the cursor over a field on the form canvas to display the field options.

4. Click the  icon beside **Enable Assessment Table**.
5. Select one of the following dropdown menu options to determine what data displays:
 - **Raw Value:** The numeric value (with no label) of a select list field on which the table has been enabled (e.g., displaying the data from the "Control self-assessment" field in the relevant table).
 - **Trending:** Displays up or down arrows on the form to indicate whether the field added to the table is in an upwards (higher numeric value) or downwards (lower numeric value) trend. To display trending data in this option, the other field selected in the table must contain numeric data (e.g., select lists, formulas, or numeric fields).
 - **Assessment Name:** The name of the assessment from which the instance(s) was created.
 - **Properties:** The properties of the assessment (e.g., Name, Unique ID, Description).
 - **Fields:** Any fields added to the object type or assessment.
 - **Dimensions:** The [dimensions](#) of the assessment where the instance(s) were created.
6. Click **Add Selected** to add the option to the table.
7. Continue adding options as needed.

Assessment table

☒ Enable Assessment Table

Select one...

▼

+ ADD SELECTED (0)

Assessment Name

×

Business Unit

×

CLOSE

Options added to the assessment table.

- Click **Close** to return to the form canvas.