

Form Fields & Elements

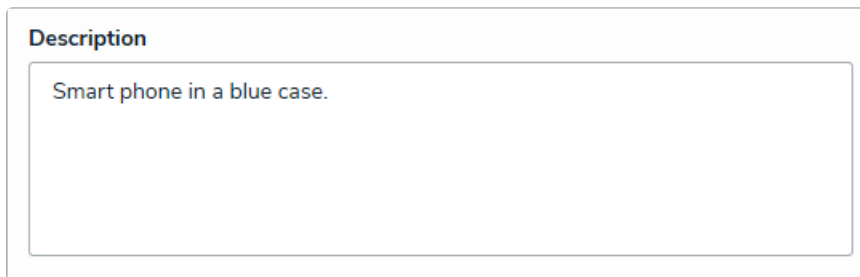
Last Modified on 08/27/2021 1:56 pm EDT

When you're creating, editing, or viewing object data, you're doing so through fields, properties, and other form elements.

Fields

Fields that may appear on objects include:

- **Text:** A field that allows users to type a single line or multiple lines of plain text directly into the field. This field may be configured to have a minimum and/or maximum number of alphanumeric characters. This field can also be configured to accept rich text formatting.



A plain text field.

- **Numeric:** A text field that allows users to type numeric characters only directly into the field. This field may be configured to have a minimum and/or maximum number of numeric characters.



A numeric field.

- **Date & Time:** A dropdown menu that allows you to select the date and time. All dates and times are saved and displayed in UTC format.

Start Date/Time

2019-05-17 8:51

May 2019 < TODAY >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

8 : 51 am

A Date & Time field.

- **Select List:** A dropdown menu with multiple options to choose from. Depending on its configuration, a select list can accept one or multiple options (a multi-select list).

Gender

Male

Male

Female

Other

A select list field.

Incident Flags

Weapon Involved x Violence in Workplace x

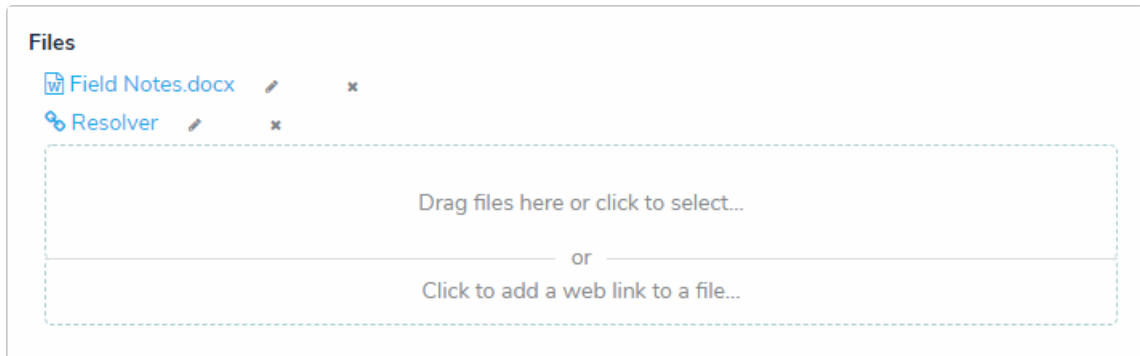
Suspect Known to Victim

Hate Crime

Contract / Vendor Involved

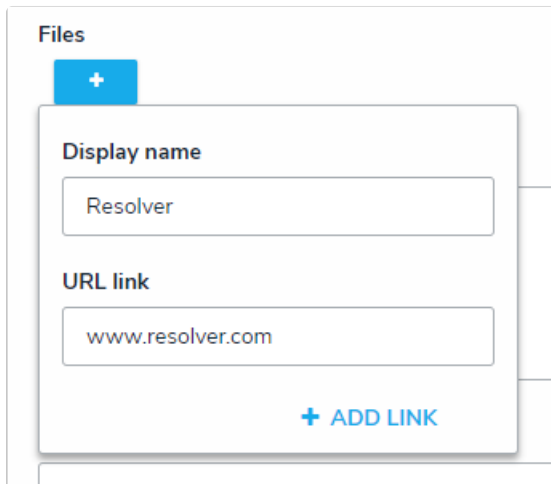
A select list with multiple options selected.

- **Attachments:** A field that allows users to upload files (up to 100MB in size), URLs (web links), or both. Note that some file types are restricted and cannot be uploaded. See the [Restricted Attachment File Types](#) article for more information.



The screenshot shows a 'Files' section at the top. Below it, there are two items: 'Field Notes.docx' with a document icon, a pencil icon for editing, and an 'x' icon for deletion; and 'Resolver' with a link icon, a pencil icon, and an 'x' icon. Below these items is a large dashed rectangular box containing the text 'Drag files here or click to select...'. Below this box is a horizontal line with the word 'or' in the center. Below the line is another dashed rectangular box containing the text 'Click to add a web link to a file...'.

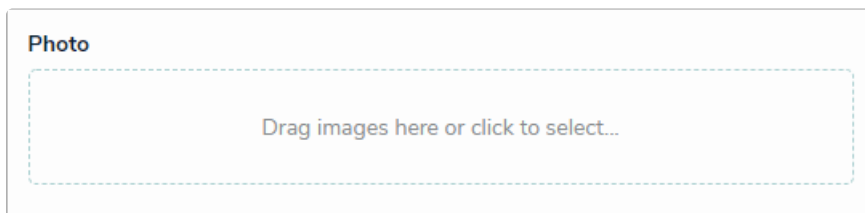
An attachment field (file and web link enabled).



The screenshot shows a 'Files' section at the top with a blue square button containing a white plus sign. Below this button is a modal dialog box. The dialog box has a 'Display name' label above a text input field containing the word 'Resolver'. Below that is a 'URL link' label above a text input field containing 'www.resolver.com'. At the bottom right of the dialog box is a blue button with a white plus sign and the text '+ ADD LINK'.

An attachment field (web link only).

- **Image Attachment:** A field that allows you to upload .JPEG, .GIF, and .PNG files to an object. Once uploaded, you can add a description, change the image name, and crop, replace, or delete the image by hovering your cursor over the image, then clicking **Click to Edit Image**.



The screenshot shows a 'Photo' section at the top. Below it is a large dashed rectangular box containing the text 'Drag images here or click to select...'.

An image attachment field.

Edit Image Field



✕ REMOVE IMAGE

↺ REPLACE IMAGE

CROP IMAGE

Name (Optional)

Resolver.jpg

Description

Options for an uploaded image, which are accessible by hovering your cursor over the image, then clicking Click to Edit Image.

Properties

Properties collect or display information about an object. Properties are created for every object type, however, some properties may not be configured to be displayed on all objects. Properties include:

- **Name:** The name of the object. This field appears on forms as a single-line text box. In some instances, editing this property on an object edit the object's header.
- **Description:** A general description of the record. This field appears on forms as multi-line text box.
- **Unique ID:** An auto-generated code assigned to identify each record. This field cannot be edited.
- **Monogram:** The one to three letter monogram and optional color configured for the record category.
- **Created By:** An auto-generated field that identifies which user created the record. This field cannot be edited.
- **Created On:** An auto-generated date that identifies when a record was created. This field

cannot be edited.

- **Modified By:** An auto-generated field that identifies which user last modified the record. This field cannot be edited.
- **Modified On:** An auto-generated date that identifies when a record was modified. This field cannot be edited.
- **Workflow Status:** Identifies the current workflow state of the object and the name of the workflow it belongs to.

A new object form displaying the object type monogram, Name, workflow status, and Description properties.

Created By	Created On	Modified By	Modified On
Lottie Thomson	2019-07-05	Lottie Thomson	2019-07-05

The Created By/On and Modified By/On object properties.

Formulas

Formulas compile numeric data from objects to generate conclusions, such as Incident Severity, Estimated Damage, or Likelihood the Incident Will Recur. These conclusions can be on forms as a with or without colors as a number, label (e.g. Low, Medium, High), both numbers and labels, a gauge, or formula card.

Vehicles Involved

Blue Car ×

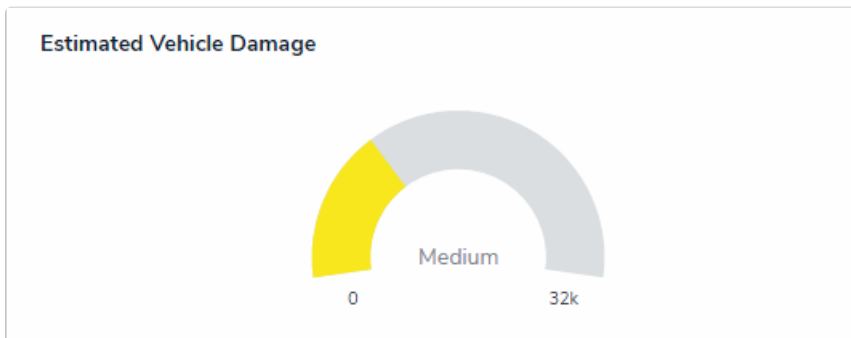
▼

+

Estimated Vehicle Damage

Medium

A formula on a form.



A formula on a form displayed as a gauge.

Relationships & References

You can connect two or more object types together by creating a relationship between those object types. For example, to track which controls are in place on a risk, you could select Control A on Risk B through the Controls relationship on the Risks object type. Depending on your account's permissions, it's possible view and edit objects in a relationship, link existing objects, or create new ones to add to the relationship.

Like relationships, you can use the references to link two objects together, but a reference appears on the destination object versus the object on which the relationship is saved. For example, selecting Risk B on the reference field on Control A would link these two objects together, even though the relationship is saved on the Risks object type. References are automatically created with relationships but may or may not be displayed on an object's form. Depending on your account's permissions, you can view and edit objects referenced objects, link existing objects, or create new objects to reference.

Both relationships and references can appear on forms as a dropdown menu or a table. Clicking the + icon allows users with the appropriate permissions to create new relationship or reference objects. Clicking an object in these fields will display that object.

See the [Relationships & Data Definitions](#) article for more detailed information on how object types can be related to each other.

Activity Type

property ▼

+

PR02 - Property Lost Library

PR01 - Property Found Library

A relationship displayed as a dropdown menu.

Risks

Search Table...

Monogram	Unique ID	Name	
R	R-58	Safety	×
R	R-31	Business Continuity	×
R	R-30	Tone at the Top	×
R	R-29	Unethical behaviour	×
R	R-28	Bribery & Corruption	×
R	R-27	Fraud	×
R	R-18	Local, regional, national political environment	×
R	R-17	Corporate Governance	×
R	R-16	Transparency & Financial Integrity	×
R	R-15	Risk Oversight	×
Q ADD EXISTING RISKS		+ CREATE NEW	

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A relationship and its objects displayed as a table.



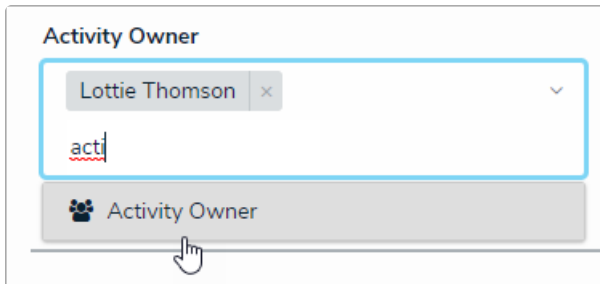
Relationship and reference object search results are limited to 10. Narrow your results down by using specific words from the object name you are searching for.

If changes are made to the display of an existing formula, you must click **Reformat Formulas** from the **Edit Object Type** page before those changes are displayed.

User Group Fields

The user group fields on a form gives users the ability to grant other users permission to view or edit to specific objects they would otherwise not be able to access.

User group fields control which records a user can create, edit, delete, view, or manage. What the user can do with the object once access is granted is controlled by the permissions configured for their user group. Access is granted to other users by entering keywords to search for one or more users or user groups, then selecting them. User groups are identified by the  icon in the field search results.

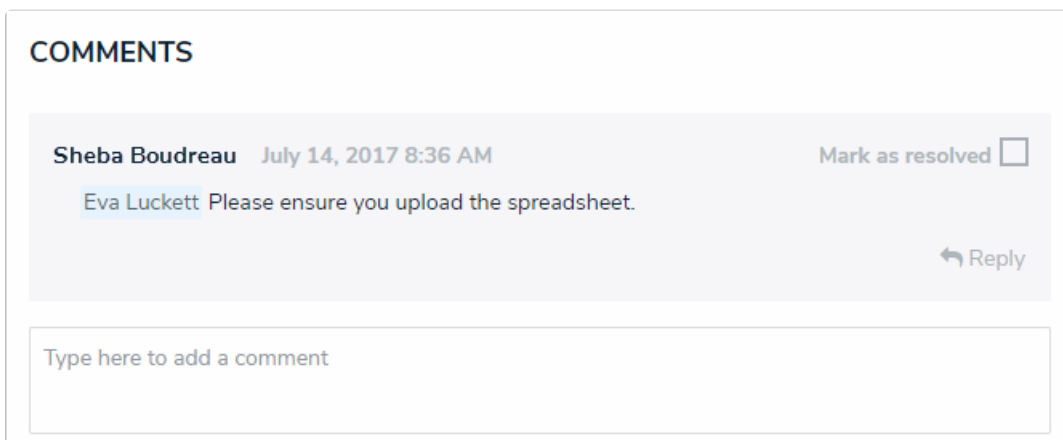


The screenshot shows a form field titled "Activity Owner". Inside the field, there is a tag for "Lottie Thomson" with a close button (x) and a dropdown arrow (v). Below the tag, the text "acti" is visible. At the bottom of the field, there is a button with a group icon and the text "Activity Owner". A hand cursor is pointing at this button.

A user group field on a form.

Comments

Allows users to comment on an object and tag other users. See the [Comments](#) article for more details on this feature.



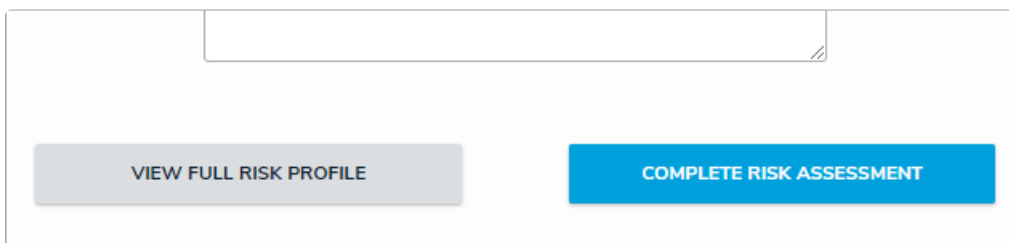
The screenshot shows a comment section titled "COMMENTS". It contains a comment by "Sheba Boudreau" dated "July 14, 2017 8:36 AM". The comment text is "Eva Luckett Please ensure you upload the spreadsheet." To the right of the comment is a "Mark as resolved" checkbox. Below the comment is a "Reply" button. At the bottom of the section is a text input field with the placeholder "Type here to add a comment".

A comment on an object.

Triggers & Buttons

Triggers appear as clickable buttons on forms, with or without colors, that move an object from one workflow state to another (e.g., clicking the Create trigger will move an object into the Draft state).

Action buttons on forms can open other forms, data export reports, or data visualizations. Action buttons on views (in an app's tabs), allows users to create a new object.



The screenshot shows two buttons side-by-side. The left button is grey and labeled "VIEW FULL RISK PROFILE". The right button is blue and labeled "COMPLETE RISK ASSESSMENT".

A form action and trigger on an object.

Risk Management

Identify Risks

Assess & Treat

Monitor & Review

Issues & Actions

Loss Events

...

Identify Risks

Identify Risks

Risk identification is a process that involves finding, recognizing, and describing the risks that could affect the achievement of an organization's objectives. It is used to identify possible sources of risk in addition to the events and circumstances that could affect the achievement of objectives. It also includes the identification of possible causes and potential consequences.

-ISO 31000

+ CREATE NEW RISK

An action button,