

Enabling a Trending Table on a Form

Last Modified on 01/14/2025 1:53 pm EST

Overview

Trending tables allow users to analyze how objects or values change over multiple timeframes. For example, trending tables could be used by:

- Risk users who compare the current risk score to previous risk scores within a specific timeframe.
- Risk executives to run a repeatable form on a report to review how their top 10 risks are trending.
- Incident users to compare the number incidents logged at a specific location and timeframe.
- Users who review dashboard reports to identify important trends in the data (e.g., Incidents by Location).

Trending data is displayed as a line graph and table on a form and can be configured by weekly, monthly, quarterly, bi-annual, or annual time periods.

Clicking the **+ Show More** link, will display 12 additional data points based on the timeframe you set.



Trending Table

Related Information/Setup

Before you can add a Trending Table you must first create a new standard form. Click the link below to find out more information regarding creating a new standard form:

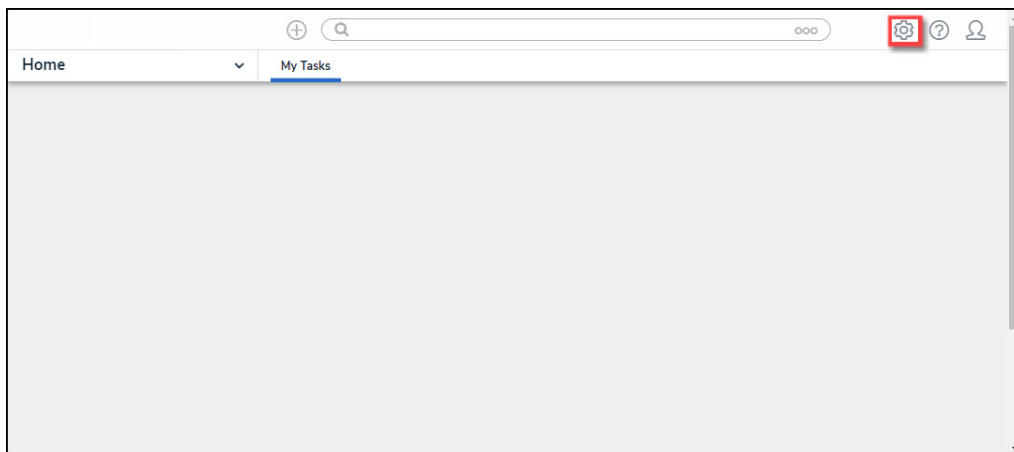
- [Create a New Standard Form](#)

Trending tables display single select list, numeric field, and formula data in a line graph or table on standard configurable forms and repeatable forms. Click the links below to find out more information regarding the Trending Table display options:

- [Singel Select Lists](#)
- [Numeric Fields](#)
- [Formula Data](#)
- [Repeatable Forms](#)

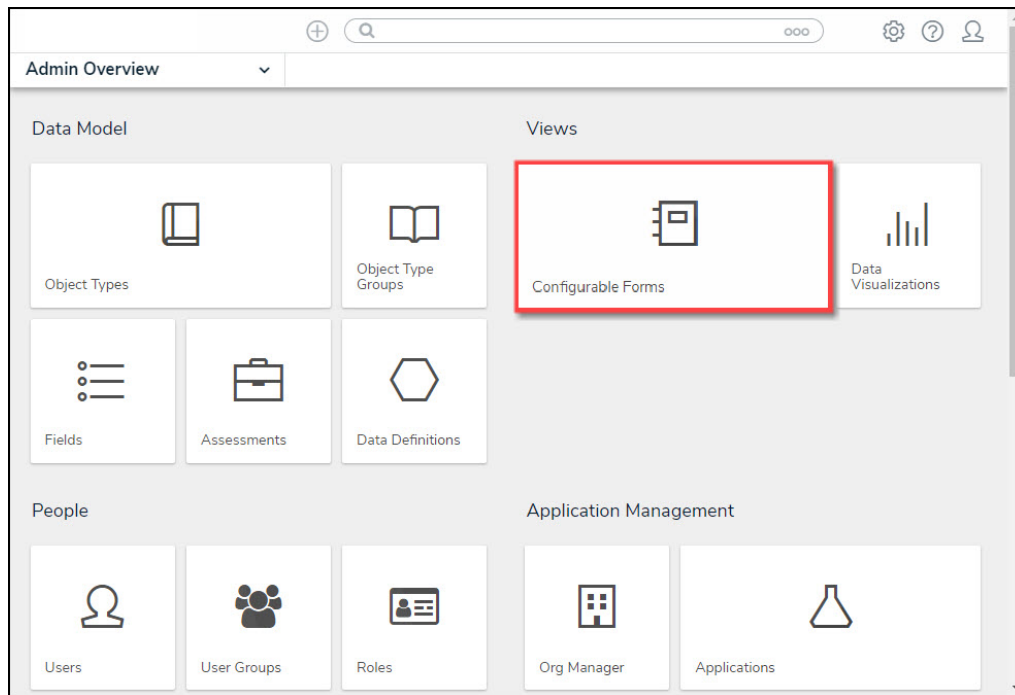
Navigation

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



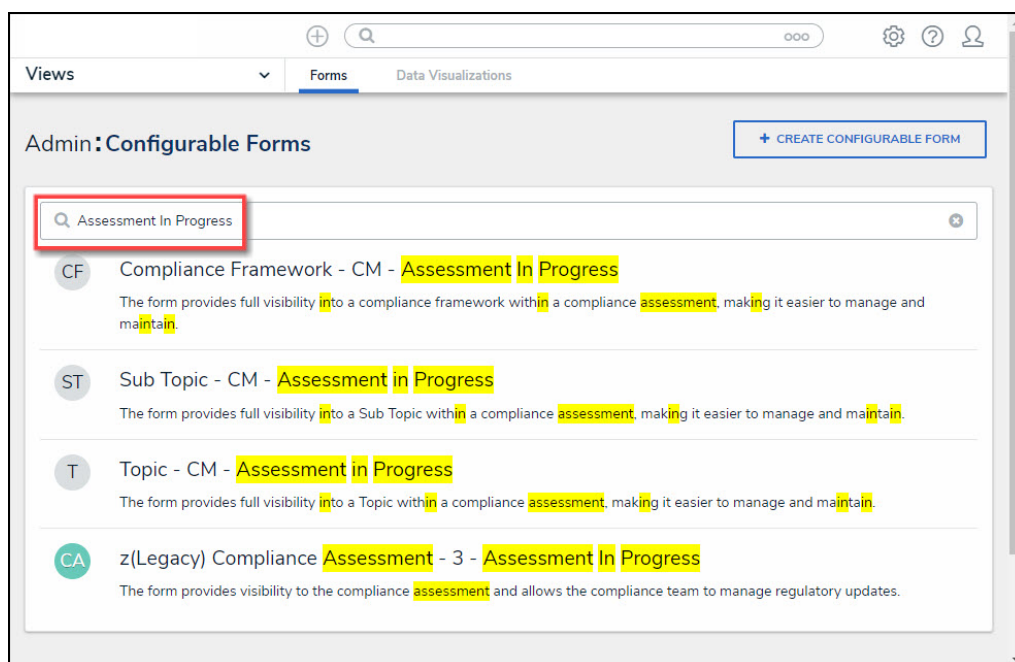
Administration Icon

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.

Views Forms Data Visualizations

Admin: Configurable Forms [+ CREATE CONFIGURABLE FORM](#)

Q Assessment In Progress

- CF Compliance Framework - CM - Assessment In Progress
The form provides full visibility into a compliance framework within a compliance assessment, making it easier to manage and maintain.
- ST Sub Topic - CM - Assessment in Progress
The form provides full visibility into a Sub Topic within a compliance assessment, making it easier to manage and maintain.
- T Topic - CM - Assessment in Progress
The form provides full visibility into a Topic within a compliance assessment, making it easier to manage and maintain.
- CA z(Legacy) Compliance Assessment - 3 - Assessment In Progress
The form provides visibility to the compliance assessment and allows the compliance team to manage regulatory updates.

Select a Form Name

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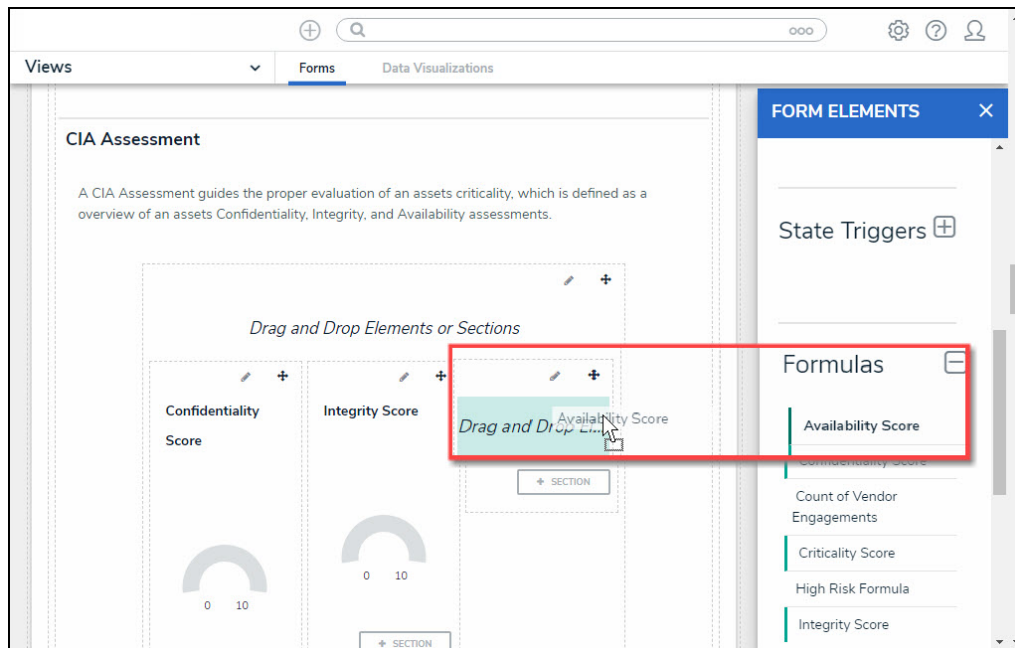
Before you can create a Trending Date Table you must ensure the Object Type selected for the form has a [single select list](#), [numeric field](#) or [formula](#) added to its components.



Note:

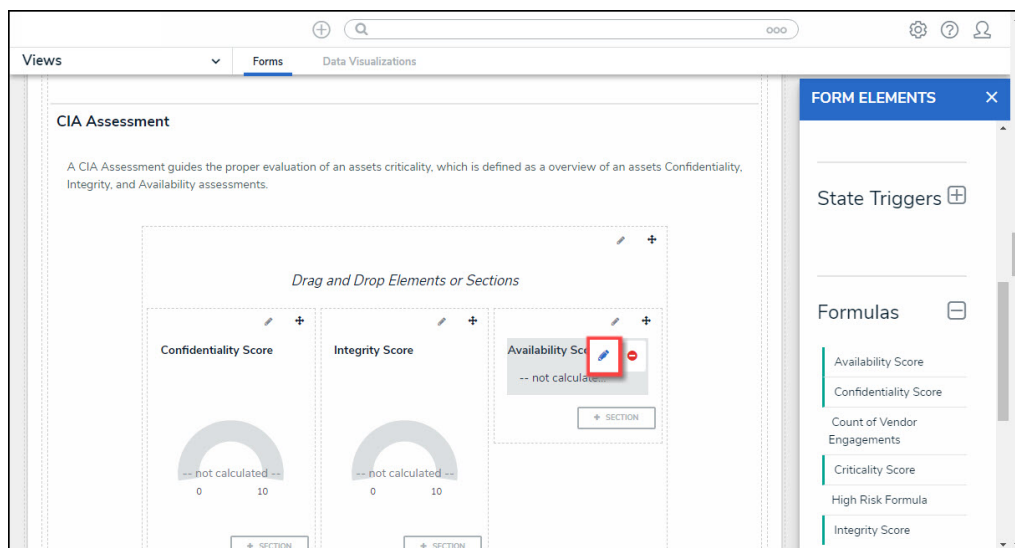
Recently added fields or formulas may not have enough data to display longer time periods.

1. From the **Edit Configurable Forms** screen, drag and drop the Field or Formula (e.g., Availability Score) from the **Form Elements** pop-up to a card or section on the canvas.



Drag and Drop Element

2. Hover your cursor over the Field or Formula, then click the **Edit** icon.



Edit Icon

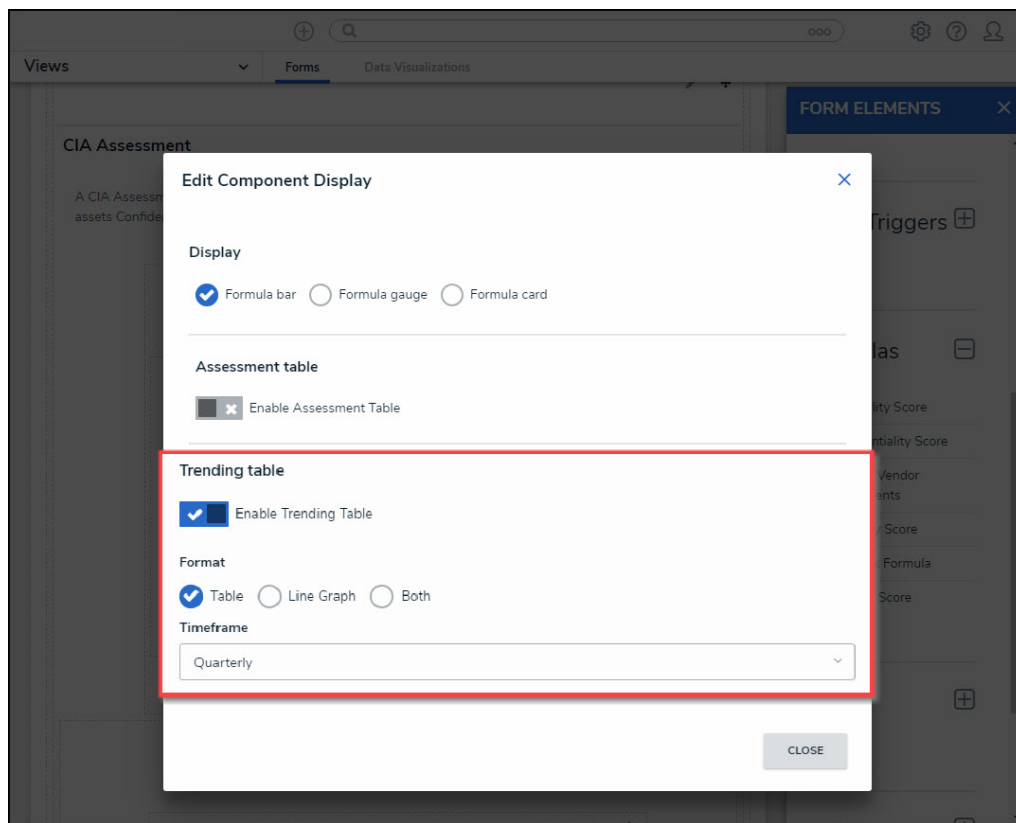
3. From the **Edit Component Display** screen, scroll down to the **Trending table** section and click the **Enable Trending Table** toggle to display the **Trending Table** options.



Notes:

Use no more than ten trending elements per form.

A report should not have more than 100 trending elements across all its repeatable forms (a report has 25 repeatable form objects; each form should have four trending objects totaling 100).



Trending Table Toggle

3. Select a **Format** radio button that displays the trending data using a **Table**, **Line Graph**, or **Both**.
4. Select a **Timeframe** from the dropdown list:
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Semiannually
 - Annually



Notes:

The trending form element only shows historical values. Data for the current date will not be included.

The data displayed uses values that are valid at the end of the selected timeframe (March 2019 data is available at 11:59 p.m. on March 31, 2019).

5. Click the **Close** button to save your changes.

