

Form Headers Overview

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Overview

By default, when creating a new object, each standard form has a header of **Create a New [Object Type name]**. Once the object is created, the header is replaced with the value entered into the **Name** property (i.e., the title) on the form and no description (i.e., the sub-title) is displayed. However, Administrators can configure the header settings to:

- Display a custom name for the form title and a custom description for the form description
- Allow users to make edits by clicking and typing directly into the header, or by changing the **Name** or **Description** properties (provided the appropriate [Edit permissions](#) are enabled on the user's role and the header is not marked as read-only)
- Show the object's **Unique ID** in the header to the far right of the object title



Note:

Default concatenations (i.e., automatically completed fields) on the **Name** and **Description** properties are applied when an object is created. However, any edits made to these properties after that point will override the default concatenations. Therefore, when creating customized headers with your own titles and descriptions, you should take note of any concatenations you need to ensure they're not overridden and cause reporting errors.

Header Navigation

The form features appear in the header navigation, which hosts essential object information at the top of the form. These form features include:

- **Trending & Analysis:** The **Trending & Analysis** tab shows Assessment Results.
- **Manage Assessments:** The **Manage Assessments** tab allows you to push object updates syncing the assessment with the library.
- **Relationship Graph:** The **Relationship Graph** tab shows how that object is connected to other objects.
- **History:** The **History** tab tracks all form changes and lists the details.
- **Emails:** The **Communications** tab is where the email information will appear and tracks all form email correspondence. The Email option is only visible in the Navigation, based on the Email Settings used to generate that object. Read more here: [Create an Email Setting](#).
- **Comments:** The **Communications** tab is where the comment information will appear and tracks all form comments.

Applications

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Loss Event Overview

LE-36 REVIEW

Details

Trending & Analysis

Manage Assessments

Relationship Graph

History

Communications

Loss Event Name

Accounting Error

Description

Has eu regione euripidis voluptatum, pro dolore verear in. Ut nulla utinam integre nec, et velit soleat corruptit quo, ut est natum omnesque appetere. Cum solet feugait quæstio ut. Cum ne cetero virtute laboramus.

Loss Event Owner

Q Add Loss Event Owner

Date/Time Submitted

March 11, 2020 8:00 pm

Event Severity

Low

Internal Business Unit

Business Unit 1

Level 2 Loss Event Type

Improper Business or Market Practices

Level 2 Business Line

Discretionary Fund Mgt

Date of Occurrence

February 27, 2020

Date of Discovery

March 5, 2020

An Example of a Form Header



Tip:

To create consistency and establish naming conventions – particularly as an object transitions across workflow states – objects should utilize the object name for their form title and not a custom name.