

Conditions: Field Condition Sets



by Jon Mulhern on 7 August 2018

infocapture, intranet, FCS, conditions

Understanding Field Condition Sets

With every form you make, you're extremely likely to be working with Field Conditions (Also known as *Field Condition Sets*) and Triggers.

They are the ways in which you specify when you want your form to change or react, and form the basis of all your form's behaviours and rules.

The easiest way to know the difference between the two:

A Field Condition Set is simply a true/false statement.

A Trigger looks for when an exact change in the form occurs. Triggers are explained further in their own knowledgebase article.

Every time a form is submitted or edited, the system will check which conditions have been met.

By themselves, they will not do anything. They can however be used elsewhere to allow dynamic behaviour to occur:

- Controlling [Field Visibility](#)
- Defining [Workflow](#) rules
- Defining [Triggers](#)
- Defining [SLA rules](#)

Examples of Field Conditions

1. The status of a form has reached *Pending Manager Approval*
2. A date entered into a date field is less than 01-Jan-2018
3. A selection, on a dropdown lists of departments, has the choice *Marketing Dept*

Default Field Conditions

Head to *Admin > Infocapture > (your project) > Field Conditions*

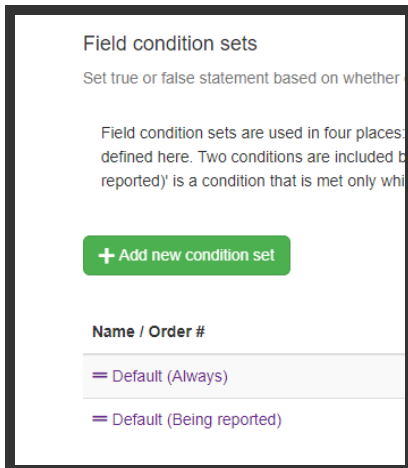
You'll see two already exist. They are:

Default (always): This is a condition that is always true. You'll find this is most useful when you later setup Field Visibility, are you may need to say that the form behaves in one way all the time, until a particular condition is met when you want the behaviour to change. The first behaviour would simply make use of the Default (always) condition, as it'll always be true and active.

Default (being reported): Similar in that it's true, but *only* when the user is in the process of submitting the form. Perhaps you'll want a warning message to appear to a user while filling out a form, but it doesn't need to be seen after they've submitted the form - you'd use this field condition.

Creating Field Conditions

Click *Add new condition set*



You'll now see a list of all the fields on your form, and your available criteria. Start by naming it, and give it a name that will be clear to other administrators.

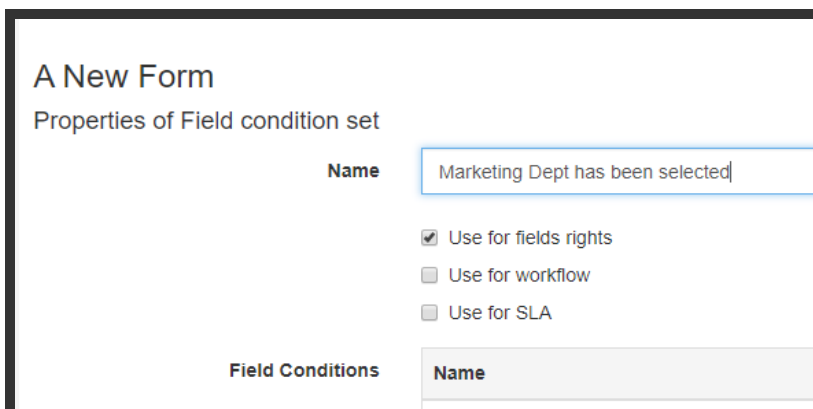
Next tick:

Use for fields rights if you plan to show/hide parts of the form based on this condition

Use for workflow if you plan to change the workflow, which is the behaviour of how options can be changed on the form. This will be explained further in the workflow article.

Use for SLA if you are planning to use SLAs on your form.

If you're not sure yet, tick all three.



Scroll down and find the form field you wish to create a condition for.

N.B. you will **not** see any Multiple Select, Multiple Radio buttons, or Multiple User Select fields available. They cannot be used with any kind of condition or logic.

Let's take the example of a dropdown list. I want to show a new part of the form if a user selects *Virgin*.

The screenshot shows a form configuration interface. At the top, there is a section with a checked checkbox labeled 'Company' and a 'Select' dropdown menu. The dropdown menu is open, showing three options: 'Boeing', 'Virgin' (which is highlighted in blue), and 'Barclays'. Below this section is a checkbox labeled 'Only when ticket is submitted'. At the bottom of the form, there is a 'Trigger' section with a checkbox labeled 'Create a trigger for this condition (the trigger will have the name as this condition set)'. Below the 'Trigger' section is a purple 'Save' button.

1. Tick the 'use for field rights' box at the top of the page, as I'll want to use this later in *Field Visibility* to set rights on my new part of the form.
2. Tick the box to the left of the select list's name - 'Company' in my example. This is necessary to clarify that the condition is dependant on a value in this field.
3. Select 'Virgin' from the list.
4. Click Save

You'll notice two last checkboxes at the end of the page:

Only when ticket is submitted - If you only want this condition to be true when a form is initially submitted, but remain false afterwards.

Create a trigger for this condition - are you planning to send a notification later based on this condition? Save time and tick this box to have the trigger created for you.

Recommended next article: Triggers