



Infocapture: 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.

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:

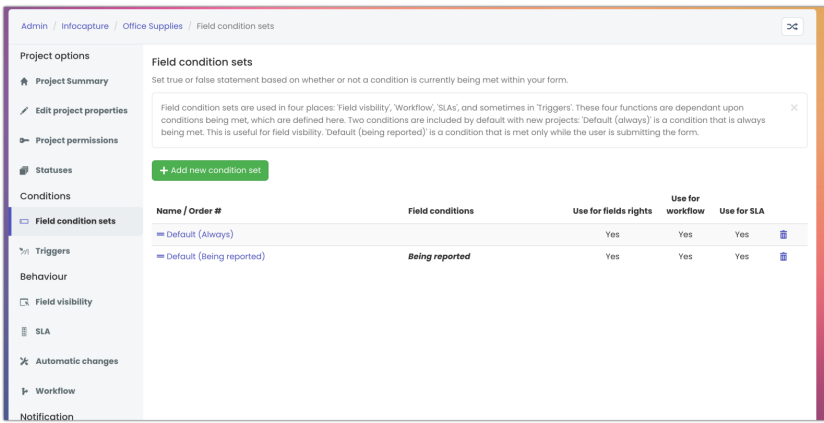
- Controlling *Field Visibility*
- Defining *Workflow* rules
- Defining *Triggers*
- Defining *SLA rules*

Examples of Field Conditions

1. The status of a ticket is in 'Pending Manager Approval'
2. A date entered into a date field is less than 01-Jan-2018
3. A specific selection has been made in a field e.g. the select type department field has 'Marketing' chosen in it, a checkbox has been toggled on/off etc

Default Field Conditions

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



You'll see two already exist:

Default (always): This is a condition that is always true. You'll find this is most useful when later if setting up Field Visibility sets, where you may need to define that the form behaves in one way all the time until a particular condition is met which is 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 - use this field condition.

Creating Field Conditions

Click the 'Add new condition set' button.

You'll now see a list of all the fields on your form and your available criteria.

Start by naming it something that will be clear to other administrators its purpose, and will make sense over time as other members of your team come to make changes.

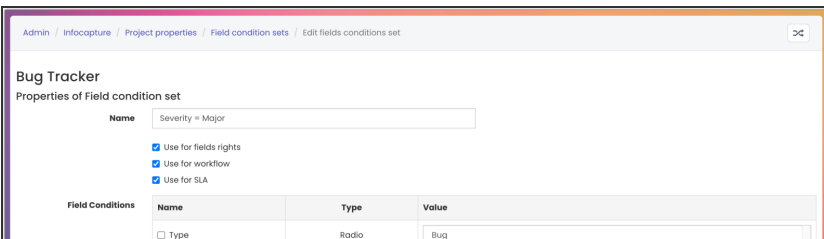
Next tick:

Use for fields rights if you plan to use field visibilities 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.

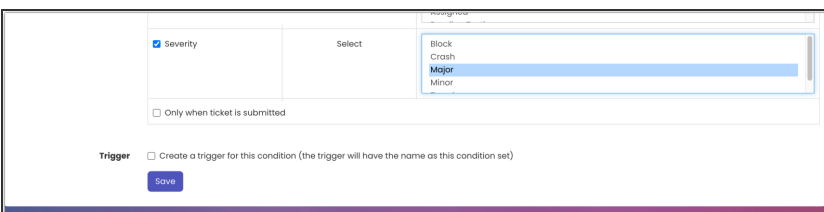


Scroll down and find the form field you wish to create a condition for.

Reminder: will **not** see any Multiple Select, Multiple Radio buttons, or Multiple User Select fields listed because they cannot be used with any kind of condition or logic, you will need to fulfil your purpose using another field type in these situations or tweak the requirements of your form to fit system capabilities.

Let's take the example of a dropdown list.

I want to show a new part of the form if a user selects 'Major' in the 'Severity' field.



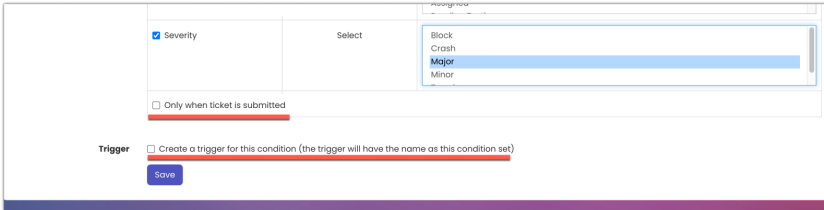
1. Tick the 'use for field rights' box at the top of the page, as we want to use this later in Field Visibility to set rights on the new part of the form.
2. Tick the box to the left of the select list's name - 'Severity' in this example. This is necessary to clarify that the condition is dependent on a value in this field.
3. Select 'Major' from the list.

4. Click Save

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

Only when a ticket is submitted - If you only want this condition to be true when a form is initially submitted, but remain false afterwards. e.g. A form field appears to the submitter as they fill out the ticket but once submitted only the handler can see that field.

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



The screenshot shows a form configuration interface. On the left, there is a checkbox labeled 'Severity' which is checked. To its right is a 'Select' dropdown menu with a list of options: 'Block', 'Crash', 'Major', and 'Minor'. Below the dropdown is another checkbox labeled 'Only when ticket is submitted' which is unchecked. At the bottom left, 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)' which is unchecked. A 'Save' button is located at the bottom center of the form.

Recommended next article: Triggers

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Tags: infocapture, intranet, FCS, conditions, field condition