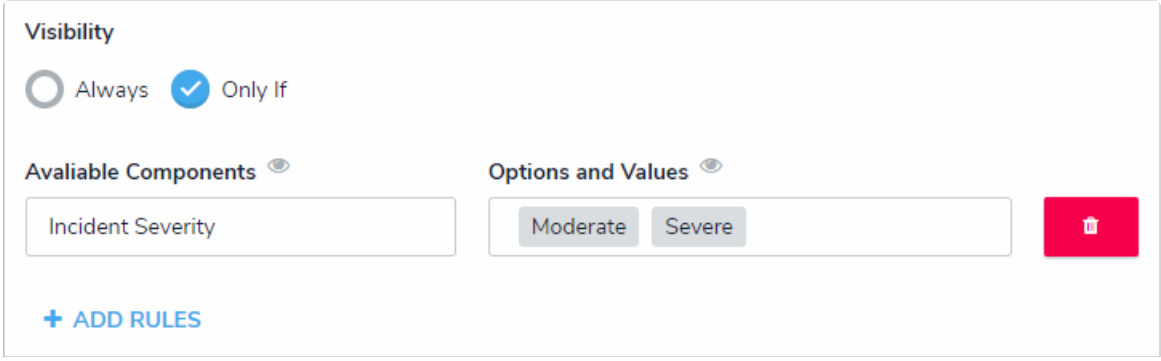
Control Form Section Visibility

Last Modified on 04/19/2022 11:06 am EDT

The **Edit Form Section: Visibility** settings allow admins to always display a standard form's sections and the elements within it. You may also choose to only display the section, once specific formula values (i.e., ranges) or select list options are selected in another form section. For example, when creating a new incident object, the Witness Details section is hidden – unless the end-user chooses Yes from the Witnesses? dropdown menu.

To specify what is displayed in a certain section, at least one **rule** must be created. From there you'll choose a select list and/or a formula, then the required options or values.

If multiple select list options and or formula values exist, the form user can select any one of them to reveal the section (e.g., selecting Moderate OR Severe on the Incident Severity will successfully display the form).



The Visibility settings. In this case, the end-user must select Moderate OR Severe from the Incident Severity select list to display the section.

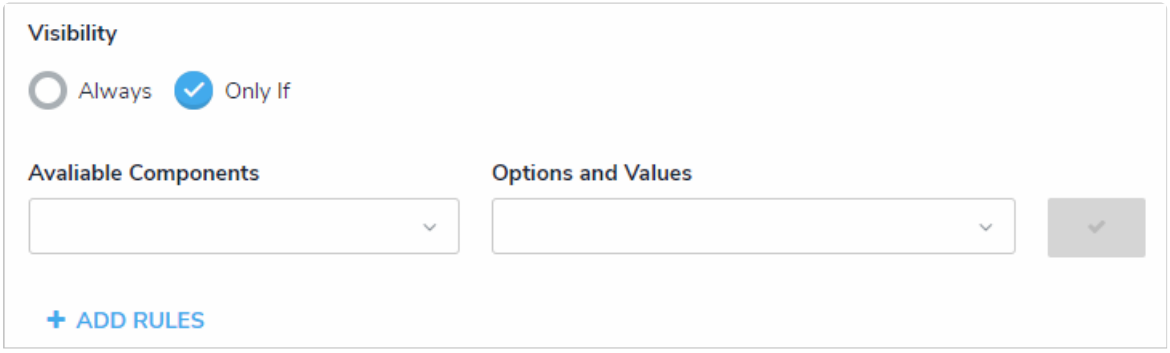
Important Notes – Sections with Controlled Visibility:

- Multiple rules can be added to a single section but doing so will create AND criteria. This means that at least one value or option must be selected from every rule to display the section.
- When adding rules, if you use formulas without ranges or on new object creation forms, the section will not display, even when the criteria is met.
- Administrators should review all form cards and sections' width within the overall form layout to ensure the hidden section(s) will display correctly.
- Adding multiple select list options or formula values creates OR criteria. For example, if a user chooses Theft, Assault, OR Vandalism from the Incident Type select list, the Illegal Acts section will display.

To control a section's visibility:

1. In the **Views>Configurable Forms** top bar section, select the relevant form.

2. Click the icon in the relevant section's top-right corner to display the **Edit Form Section screen**.
3. Select the **Only If** in the **Visibility** section (**Always** = default).
4. Click **+ Add Rules**.



The Visibility section of the Edit Form Section screen.

5. Choose a select list or formula (with ranges) from the **Available Components** dropdown menu.

> Only formulas with ranges should be selected - otherwise there will be errors.

6. Choose one or more select list options or formula ranges from the **Options and Values** dropdown menu.
    - Selecting multiple options or values creates OR criteria (e.g., if a user chooses a Theft, Assault, OR Vandalism Incident Type, the Illegal Acts section will display).
7. Click the icon to save each rule.
8. **Optional:** Click **+ Add Rules** to create an additional rule, then repeat steps 5-7 above.

> Creating additional rules will create AND criteria. This means that at least one range or option must be selected from every rule in order to display the section.

9. Click **Done** to save the visibility settings.
10. To modify a rule, you must delete it by clicking the icon, then recreate it.