smarter drafter PRO

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Create Repeating Sections in Forms

Module 16 - Repeating Content

Version 1.0

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1.   Repeating Sections

1.1   What is a Repeating Section?

A Repeating Section allows a form filler to enter multiple instances of the same information. The builder can create a single section in the form which can then be answered for as many instances as the filler requires during document generation.

1.2   When to Use a Repeating Section

A Repeating Section should be used where a document provides for multiple instances of the same information, e.g. children of a relationship, invoices issued, security properties etc.

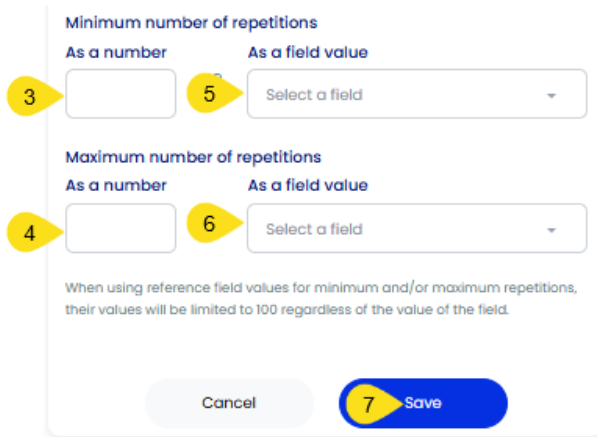# 2.   Create a Repeating Section

2.1   Section Settings

To create a Repeating Section:

1. Create a new **section**.
2. In the section properties, tick the **Repeatable** checkbox to enable the repeating functionality.

Note: Tick the New Page checkbox if you want each repeat to appear on a separate page. If the repeats are to be listed on a single page, uncheck this box.

Other property options will appear when the Repeatable checkbox has been ticked.

3. Set the minimum number of repetitions, which needs to be at least 1.

Where there could realistically be zero repeats, e.g. there may be no children of the relationship, you will need to use a prefacing question, e.g. Are there any children of the relationship? and then apply logic to the Repeating Section based on the answer being 'yes'.

4. Set the maximum number of repetitions, which is capped at 99.

Note: When setting maximum/minimum limits, consider the specific requirements of the document and whether legitimate limits should be enforced. Otherwise, set realistic limits or allow the full range of 1-99.

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5. The minimum number of repetitions can be based on the answer to a field in the form, e.g. you might ask How many children are there? and use this field's answer as the minimum to force the form filler to enter the correct number of children.

6. The maximum number of repetitions can also be based on the answer to a field in the form.

7. Click **Save**. The repeating section will appear with a Repeatable pill in the section banner.
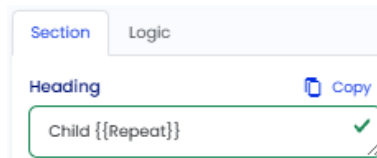
2.2 Fields

Add fields to the section, like an ordinary section, to capture the data required. Nothing different is required for fields within a Repeating Section.

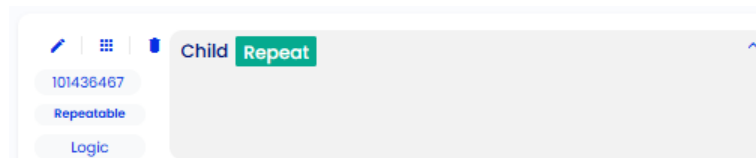Apply contact mapping (if required).

2.3 Field Labels

In the example above, the Repeating Section has been named 'Repeating section for children'. For each child that the filler enters, they will all be given this same label.

You can use the repetition number in the heading to instead show Child 1, Child 2 etc. To do this, use the prompt **{{Repeat}}** in the section heading:

The heading of the section will then appear with the repetition command:

As the filler enters the children, they will be labelled with their relevant repetition number.

2.4 Logic

Apply logic to the section, like an ordinary section, if required. Nothing different is required for logic applied to a Repeating Section.

3.   Conditional Rules

A conditional rule is required to instruct the Word template on what to do with repeating data. While the Repeating Section has fields and the form filler can add multiple instances during document generation, the template won't know how to interpret multiple answers to the same question without guidance.
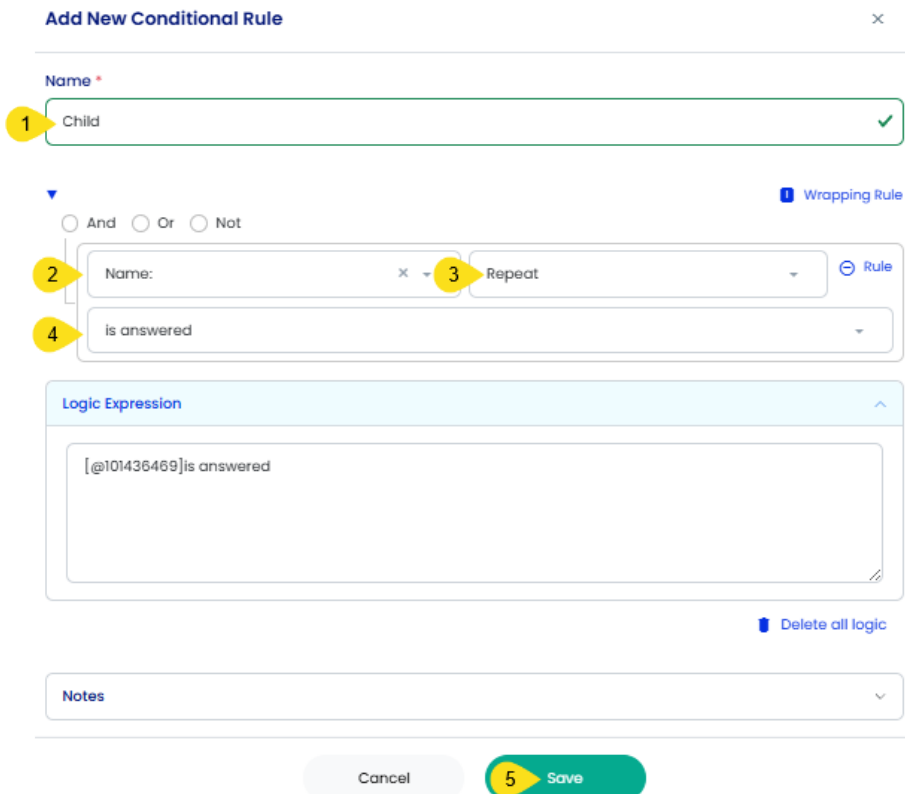
A conditional rule is required for each repeating section. When a conditional rule is built and uses repeating fields, it automatically acknowledges the repeat functionality and the options will differ from other conditional rules.

The first purpose of the conditional rule is to determine how many instances of the repeat the form filler has entered. To do this, the rule needs to point to a question that will be answered in every instance of the repeat and be a reliable field to perform the count. Never use an optional field in a conditional rule for a repeat.

## 3.1   Create a Conditional Rule to Identify Repeat

To create a conditional rule for a Repeating Section:

1.   On the form, create a new **conditional rule** with a name relevant to the Repeating Section.
2.   When applying the condition, select a reliable field that will be answered for every repeat.

3. The rule will want to know how to determine the repeat instance to use. The drop-down will list as many repeats as have been allowed plus options for any, all and repeat.

1-5: Each individual repeat instance per min/max values set in the section, if a value is selected then the rule will only assess that specific repeat instance

Any: Will check if the condition has been met by any of the repeats and return true even if only one instance meets the criteria

All: Will check the condition against all repeats and only return true if all repeats meet the criteria

Repeat: Will check each repeat independently – this is the instance to use
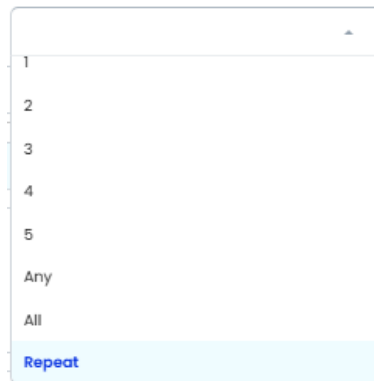
4. Set the condition to **Is answered**.
5. Click **Save**.
6. As the conditional rule will recognise that you are pointing to a field within a Repeating Section, it will add the {{Repeat}} command to the rule name and you will see the following message:

7. It will then add the green repeat label to the conditional rule name in the list:

Based on the above criteria, the conditional rule is going to assess **every repeat** and check where the **name** field has been **answered**. Because the name field is mandatory for each child, you can rely on the count being accurate.
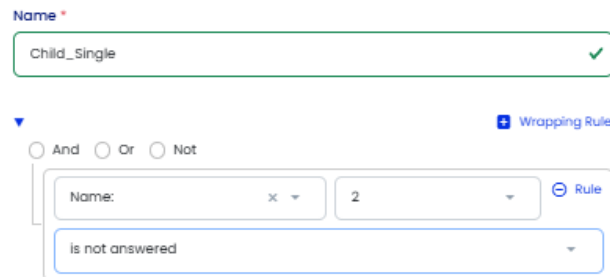
When this conditional rule is used in Word, you can trust that it will be able to replicate your requirements for each repeat.

Note: See the Insert Repeating Content in Templates guide for further instructions on using Repeating Sections in the Word template.

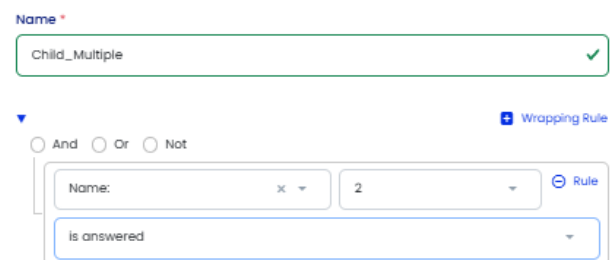## 3.2   Conditional Rules – Other Examples

Other general conditional rules may be required to control output in the Word document, e.g. a rule for a single instance, a rule for multiple instances etc.

The example below is a rule that will determine whether there is only one child, by checking that the specific instance of child 2 **HAS NOT** been answered:

The example below is a rule that will determine whether there are multiple children, by checking that the specific instance of child 2 **HAS** been answered:

4.   Calculations

When creating calculations using fields from Repeating Sections, you need to consider whether the calculation is about each repeat individually (e.g. the age of each child, is the child under 18) or about the group collectively (e.g. count how many children there are, return the word child or children).
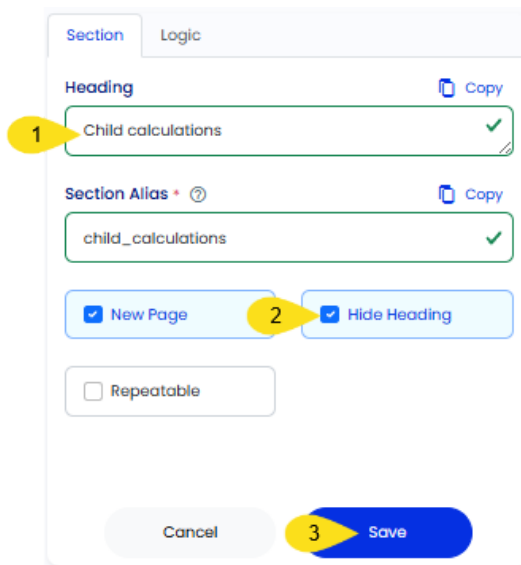
4.1   Calculations – For Each Repeat

If a calculation needs to be performed on each repeat individually (e.g. calculating the child's age), this calculation should be created within the Repeating Section. These calculations are like an ordinary calculation. Nothing different is required for a calculation within a Repeating Section.

4.2 Calculations – For the Group of Repeats

If a calculation needs to be performed on the group of repeats collectively (e.g. count how many children there are, check child count and return the word child or children), they need to be created in a separate section. The reason for this is that the calculations need to run once the form filler has finished entering all of the repeat instances and the calculations can then determine an outcome.

1. On the form, create a new **section** with a name relevant to calculations and the Repeating Section.
2. If you don't want the form filler to see the section, tick the **Hide Heading** checkbox.
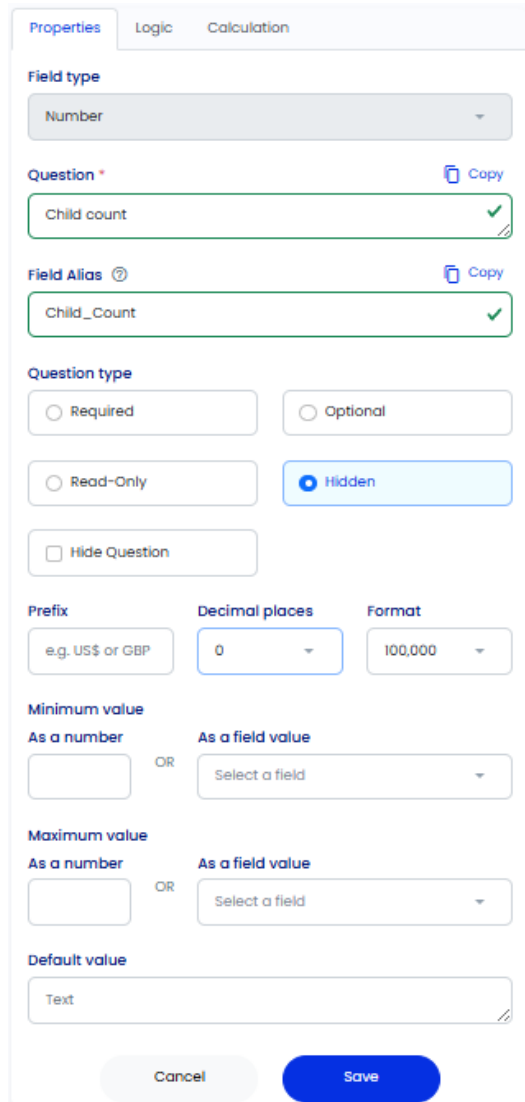3. Click **Save**.

4. Create the required calculation fields. If you don't want the form filler to see the calculations, set these fields to hidden.

Note: See examples below for ideas and instructions for group calculations.

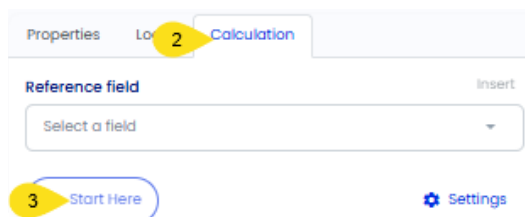## 4.3 Calculations – For the Group of Repeats – Examples

Create a field to count the number of repeat instances entered by the form filler:

1. Create the field and set the basic properties.

2. Use the calculation builder to build the repeating calculation.

   Click on the **Calculation tab**.

3. Click **Start here**.
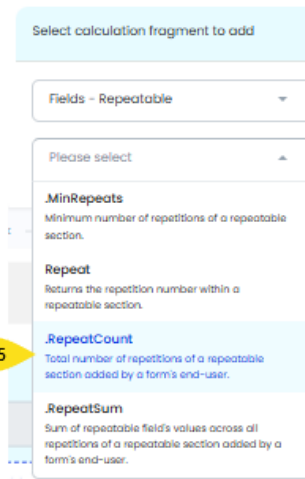
4. Select the fragment **Fields - Repeatable**.

5. Select the calculation **RepeatCount**.
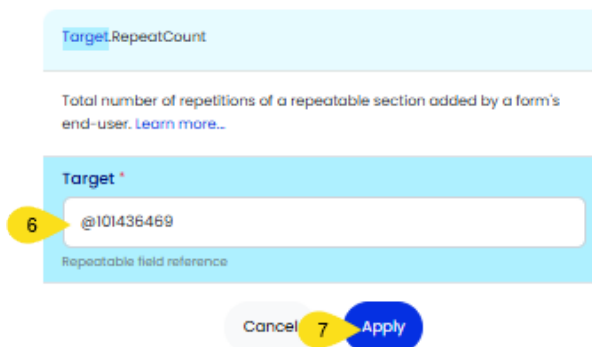
6. Insert the field ID of a reliable field that can be used to perform the count, e.g. the child name field.
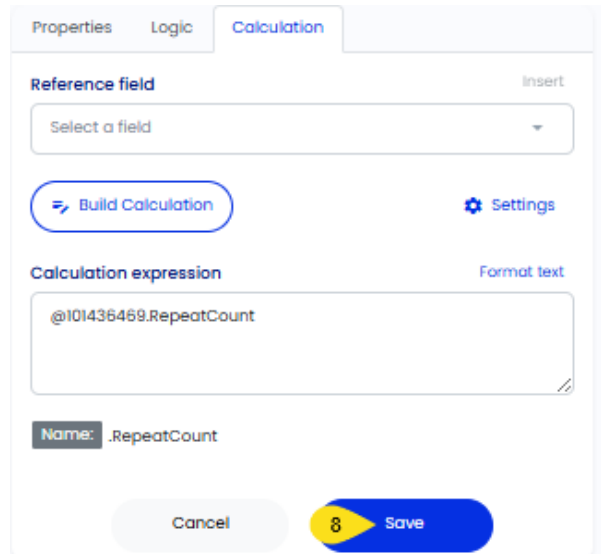
7. Click **Apply**.

8. Click **Save**.

This calculation will count how many instances of the Repeating Section that the filler enters and will return the total number. This field is a good reference to use in other calculations, e.g. to determine pluralisation.

Create a field to return the word child or children depending on there being one child or multiple children:

Using the count field created above, you can create a calculation that looks at total number of children and if the count = 1, return the word **Child** or if the count is greater than 1, return the word **Children**.

This is a simple IF THEN ELSE expression.

The same idea can be applied to many calculations and conditional rules.

5. How Does a Form Filler Enter Data in a Repeating Section?

When a form filler encounters a Repeating Section, they will have the option to Add as many repeat instances as they require.

Note: See the Insert Repeating Content in Templates guide for instructions on setting up repeating data in Word templates.