smarter drafter PRO
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Section Aliases and Field Aliases

Module 8 – Data Sharing

Version 1.0

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1.   What is an Alias?

An alias is an alternate reference to a section/field and usually describes the type of data being collected. When building a library of forms, many sections and fields are used and while those sections and fields are custom to the document being created, there is similarity in the type of data collected, e.g. a street address, mobile phone number etc.
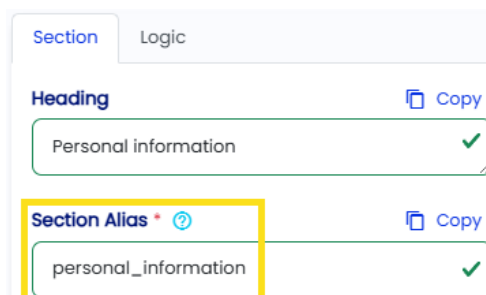
Aliases are used:

1.   to apply generalised labels to common sections/fields for the purpose of data sharing; and
2.   to create a unique identifier that is the pathway for where data is stored and named.

While a builder doesn't need to know the technicalities of an alias, a general overview will help to understand the important role they play in data sharing and assist in troubleshooting any issues with data sharing not behaving correctly.

2.   Section Aliases

It is mandatory for a section to have an alias. While the purpose is not obvious to the builder or form filler, it is an integral part of building the technical pathway and name of the data a form filler provides. For example, when a form filler answers a question, their reply is tied to the **field** that asked the question >> which sits within a **section** >> that lives in a **form**.

When creating a new section, the section alias will automatically build and replicate the name of the section. If the section name is updated, the section alias will also be updated. If this doesn't appear immediately, click in the Section Alias field and it will then refresh.

3. Field Aliases

3.1 When to use a Field Alias

Unlike a section alias, a field alias is **not mandatory**. A field alias is applied for data sharing purposes and should only be applied to fields where the form filler's answer is to be remembered, e.g.:

Purchaser
Property address   Answers can reliably be reused in other documents >> apply alias
Purchase price

Next court date   Will change as matter proceeds, answer could mislead >> don't apply alias

Amount   Too general, won't know where answer can be reused >> don't apply alias

3.2 Naming Conventions

Field aliases should describe the type of data being collected, e.g. street address, postal address, mobile number, date of birth etc. Refer to the organisation's best practice guidelines on the naming conventions that have been adopted for field aliases.

Note: The field alias is a general label and should not include 'who' the data belongs to. This will be handled by applying a role to the field (see the Creating and Assigning Roles guide).

We recommend a string that describes first, what is being described and then the component, e.g.:

name_full	address_street	phone_mobile	date_of_birth
name_first	address_postal	phone_direct	date_of_death

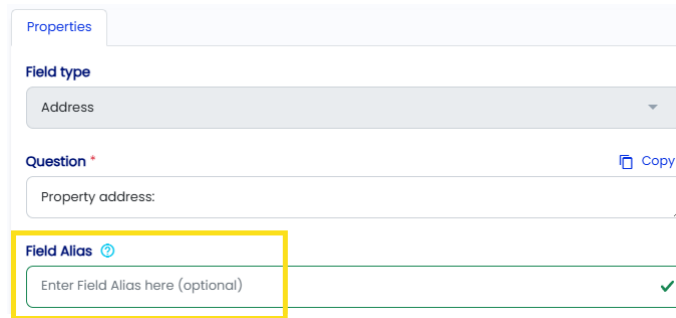---

Note: You need to ensure that aliases aren't duplicated as this will impact data sharing. If one form uses the alias **phone_mobile** and another uses **mobile_phone**, the data won't connect and so will prevent data sharing of information previously entered.

3.3   Applying a Field Alias

When creating a field you will have the option to add a field alias. As this is not mandatory, you will not be prompted to add a field alias or be warned when saving a field without one.
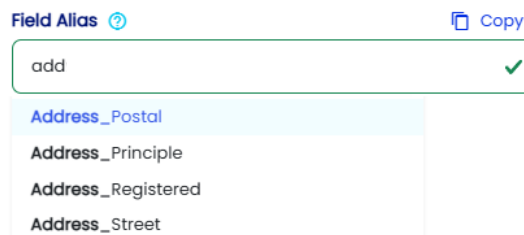

As you begin typing an alias, a dynamic search will run to check what similar aliases your organisation has previously used. This allows you to select an existing alias and prevent duplication.
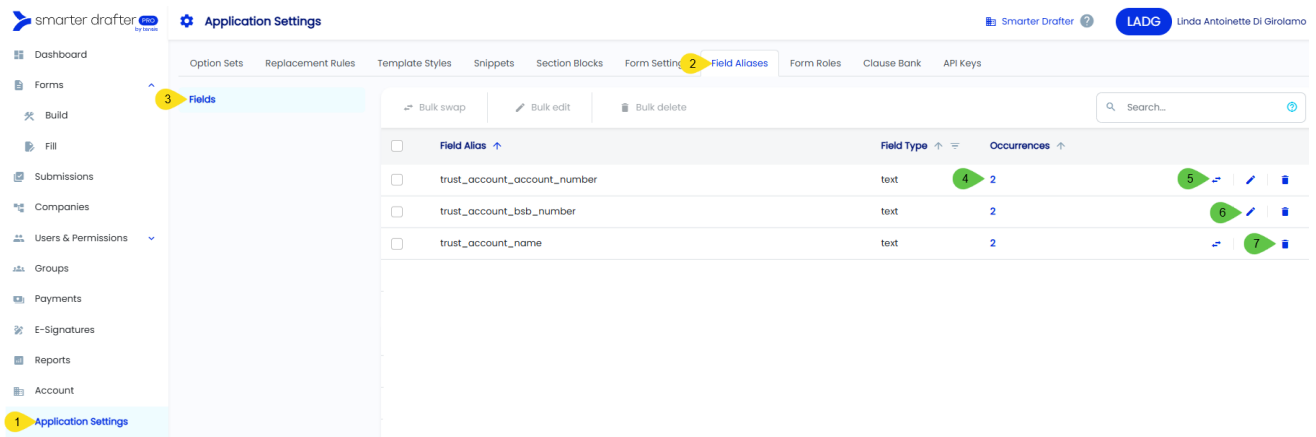

Note: Data is held in the format determined by the type of field used to create the question. You can't have the same alias applied to questions that use different field types, e.g. a mobile number asked in a phone field and then a mobile number asked in a text field can't use the same alias as the data format is not the same.
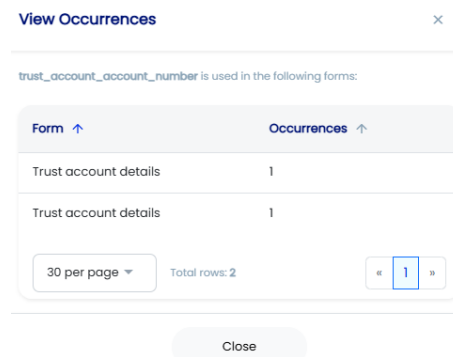
4. Managing Field Aliases

It is recommended that the list of field aliases being used by your organisation is reviewed fortnightly so that any issues can be rectified. To access the field alias list:

1. Go to **Application Settings**.
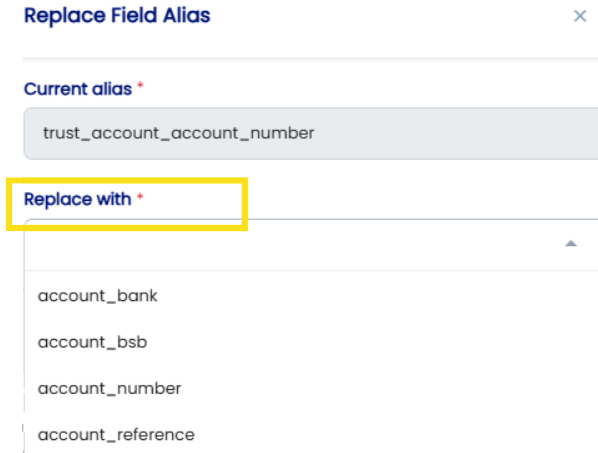2. Click on the **Field Aliases** tab.
3. Click on **Fields**.

This is where you can review and manage the field aliases that have been used.

4. **Occurrences:** Indicates how many sections/section blocks use the alias.
   Click on the number to see the list:

5. **Replace:** If a duplication is identified, you can replace the duplicate alias with the correct alias. Click on the replace icon next to the alias to be replaced and select the correct alias to use.
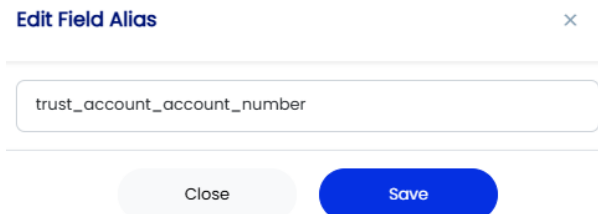

Wherever the duplicate alias was used, the correct alias will automatically be applied and override the duplication.

6. **Edit:** If an alias name needs to be adjusted, you can edit the name. Click on the pencil icon and adjust the name as required, then save.
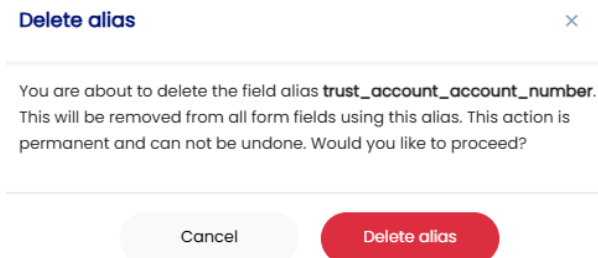

Wherever the alias has been used, the name will be adjusted.

7. **Delete:** If an alias is not required, you can delete it. If you delete an alias that is in use, it will be removed from all fields that have used it and those fields will no longer have an alias. It is recommended to run a replace first (see above) if the relevant fields require an alias, before deleting it. Click on the bin icon and confirm deletion of the alias.

5. Field Alias Connection to Roles

Roles are used to determine 'who' the data belongs to. It is the combination of the correct alias and the correct role that creates a detailed pathway and name for the data so that it can accurately be reused. See the **Creating and Assigning Roles** guide to learn how to use and apply roles and complete the data sharing set-up.