

Build a Simple Section Block

Module 7 – Reusable Content

Version 1.0

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1. Section Blocks

1.1 What is a Section Block?

A section block is a reusable section or group of sections that can be imported into an unlimited number of forms. With this feature, builders only need to create a section block once and can then reuse it in multiple other forms.

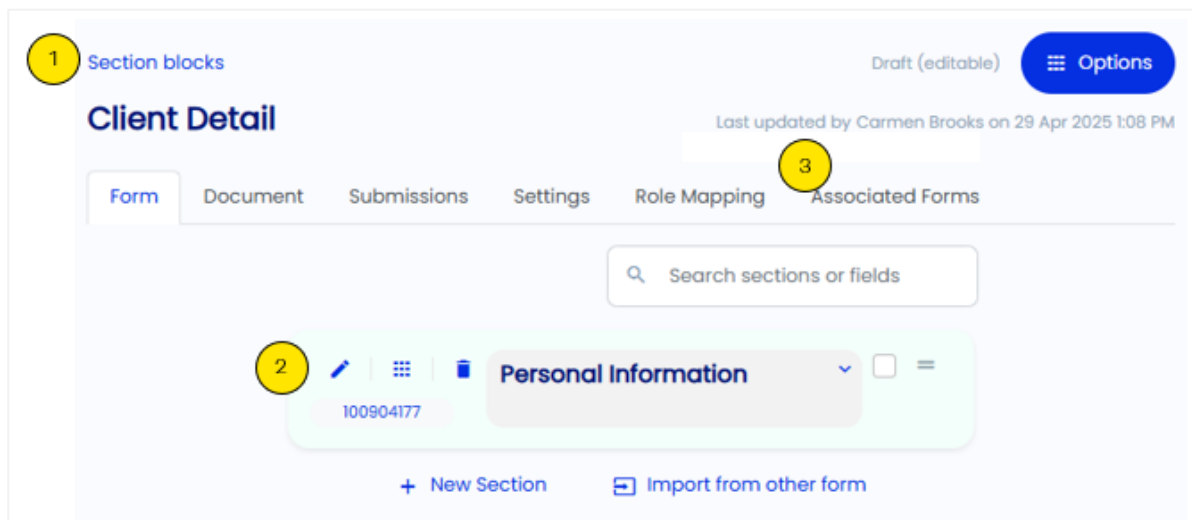
For instance, when creating a suite of court forms, every court form will require details of the parties, court filing details, legal representatives etc. Rather than building the same set of questions from scratch for each form, you can create section blocks and reuse them across all forms in the suite. When importing section blocks into forms, all conditional rules and logic are also transferred.

Section blocks are built in exactly the same manner as sections in a standard form. Any updates made to a section block will automatically be reflected in all of the forms where it has been imported, allowing you to make universal updates in a single location.

1.2 Section Block Features

Section blocks are constructed in a similar way to forms.

1. They are colour-coded green with the **Section blocks** label to distinguish them from standard forms.
2. Below is the **Section Block Builder** – note the mint green background.
3. The **Associated Forms** tab will display all the forms the section block has been used in.



The screenshot displays the 'Section Block Builder' interface. At the top, there's a 'Section blocks' header with a 'Draft (editable)' status and an 'Options' button. Below this, the 'Client Detail' form is shown with tabs for 'Form', 'Document', 'Submissions', 'Settings', 'Role Mapping', and 'Associated Forms'. The 'Form' tab is active, showing a search bar for 'Search sections or fields'. A section block titled 'Personal Information' is highlighted in a mint green box, with a unique ID '100904177'. Below the section block, there are buttons for '+ New Section' and 'Import from other form'.

2. Creating a New Section Block

Creating a section block is a similar process to creating a form; however section blocks are organised under a separate folder structure in **Application Settings**.

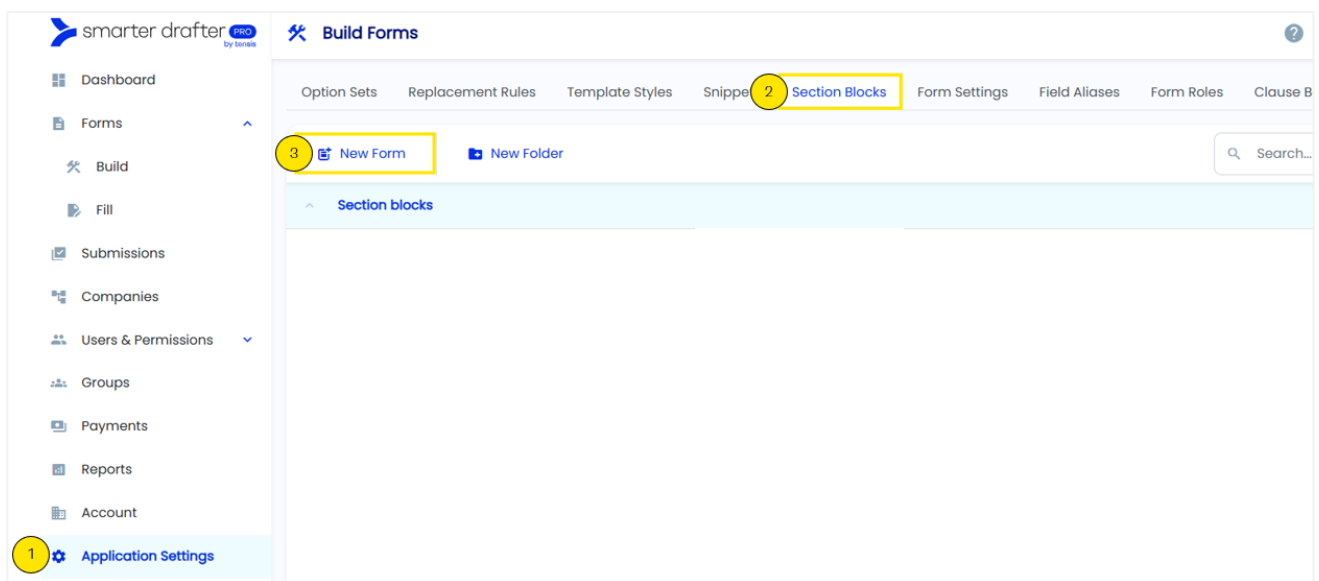
To access existing and/or create a new section block, navigate to the section block builder.

1. Click **Application Settings**.
2. Click **Section Blocks**.

Like ordinary forms, to keep the library of section blocks organised, a folder structure is used to categorise and subcategorise them. Managing the library will require the creation, deletion and relocation of folders and section blocks, which follows the same process as managing ordinary folders and forms.

To create a new section block:

3. Click **New Form** to create a new **section block**.

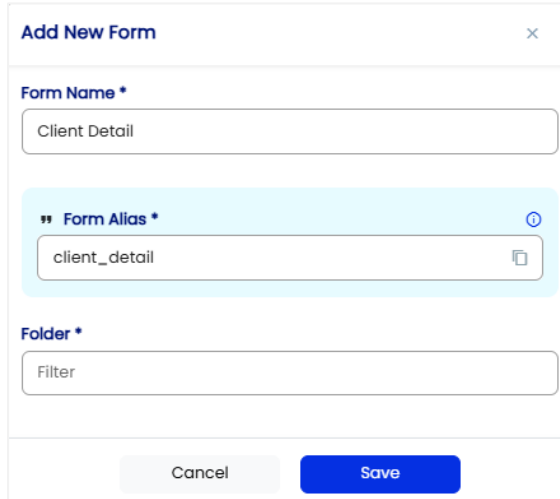


Note: Managing section blocks is very similar to managing forms. Refer to the **Folders and Forms** guide.

When you click **New Form**, a pop-up will appear for you to enter the **Form Name**.

Leave the form alias blank. This field serves technical purposes only and will soon be hidden.

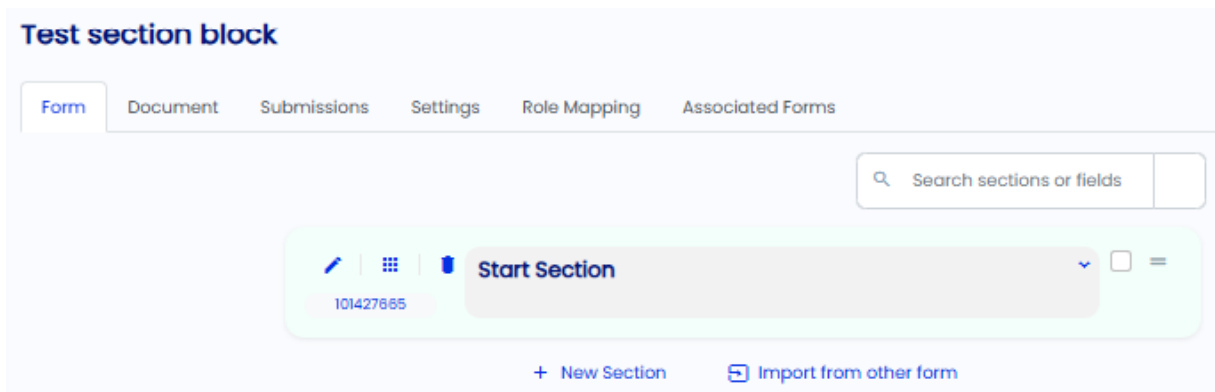
Select an appropriate folder in which to save the form. Click **Save**.



The 'Add New Form' dialog box contains three input fields: 'Form Name *' with the value 'Client Detail', 'Form Alias *' with the value 'client_detail', and 'Folder *' with the value 'Filter'. The 'Form Alias *' field is highlighted with a light blue background. At the bottom are 'Cancel' and 'Save' buttons.

Note: All Form Names must be unique.

When you click **Save** the new section block creation screen will open, ready for you to start building the required section/sections.



The 'Test section block' screen features a top navigation bar with tabs: 'Form' (active), 'Document', 'Submissions', 'Settings', 'Role Mapping', and 'Associated Forms'. A search bar on the right says 'Search sections or fields'. The main area shows a 'Start Section' button with a dropdown arrow, a trash icon, and a grid icon. Below the button is the ID '101427665'. At the bottom are two buttons: '+ New Section' and 'Import from other form'.

3. Section Block functionality

A section block can utilize the same functions as ordinary forms and sections. When building the sections within the section block you can apply:

- Logic
- Conditional Rules
- Contact and User Mapping
- Role Mapping
- Repeats

See the corresponding guides for detailed information and instructions.

Notes:

Conditional Rules created in the section block will automatically transfer to all forms where the section block has been imported.

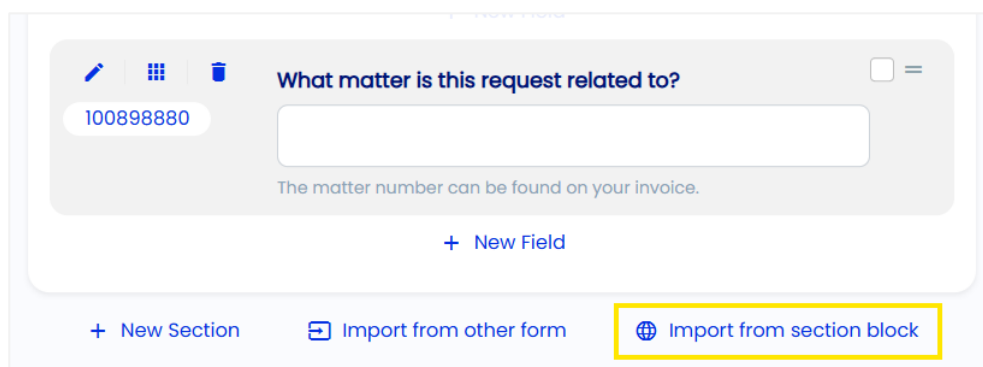
Role Mapping must be done at the section block level and will apply to all the forms the section block is imported into. It's not possible to map roles to the fields contained in a section block in the form where it was imported.

See the corresponding guides for detailed information and instructions.

4. Import a Section Block into a Form

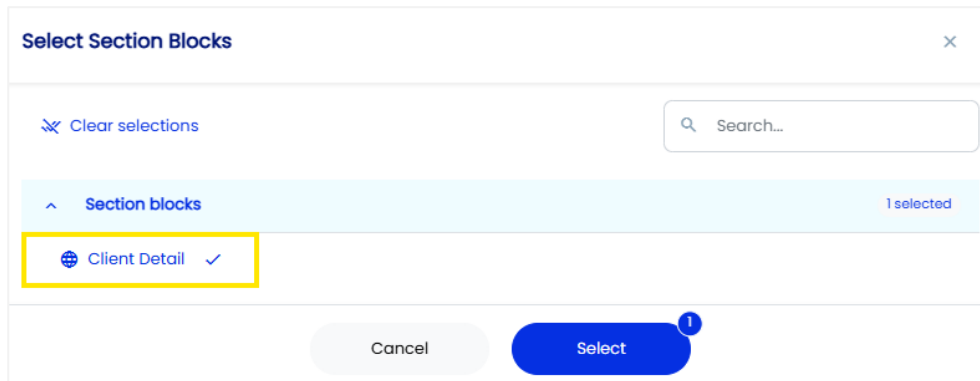
A section block can be imported into a form. Create a new form (or navigate to an existing form).

1. Click **Import from section block**.



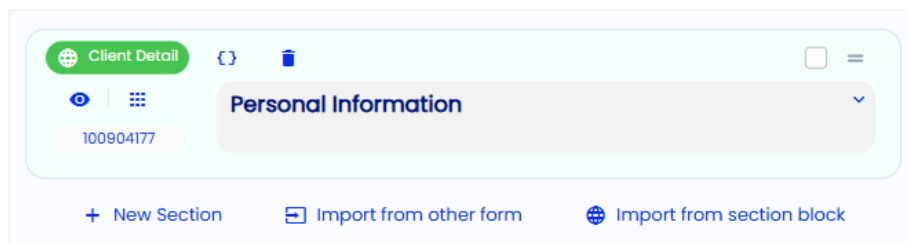
The screenshot shows a form editor interface. At the top, there are icons for edit, view, and delete. Below them is a section titled "What matter is this request related to?" with a text input field containing the value "100898880". Below the input field, there is a hint: "The matter number can be found on your invoice." and a "+ New Field" button. At the bottom of the interface, there are three buttons: "+ New Section", "Import from other form", and "Import from section block". The "Import from section block" button is highlighted with a yellow border.

2. Select the **section block** from the list and click **Select**.



The section block is inserted into the form as a section. It's highlighted with a mint green background to differentiate it from a standard section and alert the form builder that this section cannot be edited from within the standard form.

Any number of section blocks can be included in a standard form by using the **Import from section block** button.



Important: A section block cannot be edited from within a form.

To edit, open the Section Block in **Application Settings > Section Blocks**. Any edits made from there will automatically update the section block across all other forms where it has been imported.

5. Section Blocks and Content Blocks

A section block can have a Word template attached to it and works similarly to an ordinary form with a template.

A content block is a separate Word template that can use the fields from the section block to create a mini piece of a document. The content blocks are inserted into the Word template just like a field and appear as a purple content control. When the document is generated the content block will be inserted into the automated document. See the **Create a Simple Content Block** guide for detailed instructions.