



Field Types

Module 3 – Sections and Fields

Version 1.0

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1. Fields: A Quick Reference Guide

 Text

Short text answer

 Text Area

Long text answer
Filler can apply formatting

 Rich Text

Guidance note to filler
No interaction by filler

 Radio

Single select list
Best for short list / short labels

 Checkbox

Multi select list

 Select

Single select drop-down list
Best for long lists / long labels

 Email

Email address
Checks for correct email config

 Name

Person's name
Allows components to be separated

 Phone

Phone / fax numbers
Limits characters used

 Number

Numerals
Apply decimal spacing, format,
prefixes and rounding
Set conversions

 Date/Time

Date and/or time
Set format
Apply limitations

 Address

Street and postal addresses
Connected to Google Maps for
lookup and validity check
Allows components to be separated

 ID Number

Company numbers
Connected to ASIC for validity check

 File Upload

Image or file upload
Upload image into body of doc OR
separate file to generate with doc

 Matter

Matter reference
Matter ID

 Currency

Currency type selection
Determines format and prefixes

2. Things to Consider

2.1 Order of the Fields

It is recommended that you group fields together in a way that logically guides the filler through the form. Sections should be used to separate fields into their relevant group, EG party details, then property details, then transaction details etc. The sections should be presented in the order in which they appear in the document and/or in a practical order that would be easy for the filler to follow.

If one field needs to reference another field, the referenced/source field must appear in the form first. The reason for this is, when the filler is completing the questionnaire and reaches this field, it won't produce the right result if the referenced field is below and the filler hasn't answered it yet (e.g. you have an age field but the date of birth field is below so the age can't be calculated since the DOB isn't yet known).

2.2 Type of Field Used

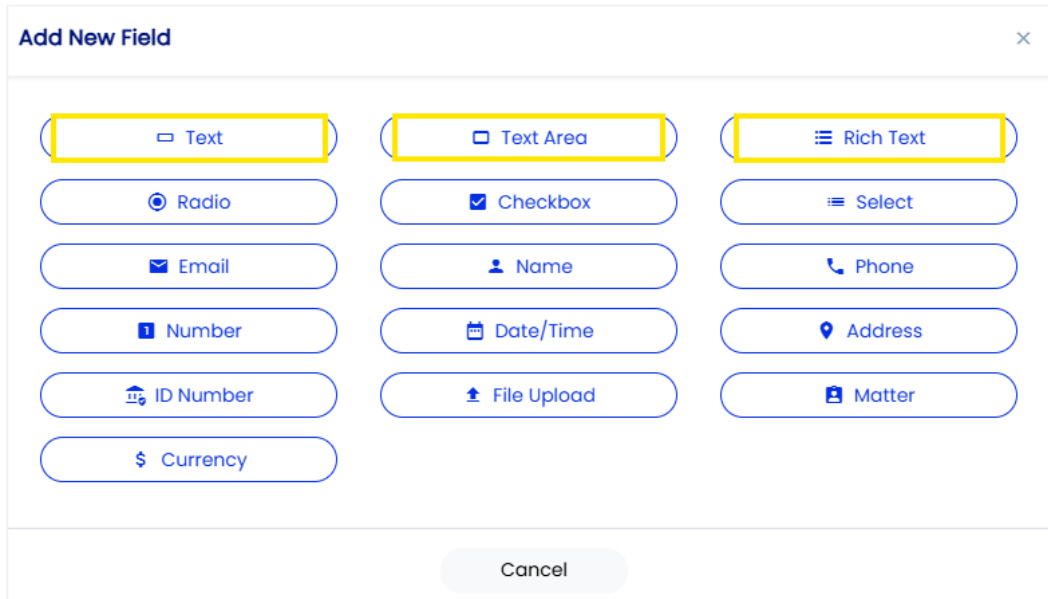
There are several field types and each has a specific purpose with unique features. Choosing the most suitable field type will assist in controlling the type of answer the filler can provide and reduce errors in the response entered.

2.3 Settings Applied

Each field type has settings that are relevant to that particular type of field. Applying the appropriate settings will assist in controlling the type of answer the filler can provide, set limitations and apply the format required, in turn reducing errors in the response entered and designing the structure of the field when it's inserted in the Word template.

3. Add Text to Forms

Text fields may enable the form filler to type free text into a form, or they may display a guidance message to the form filler during completion of the form questionnaire. The three different types of text fields will be explored here: **text**, **text area**, **rich text**.



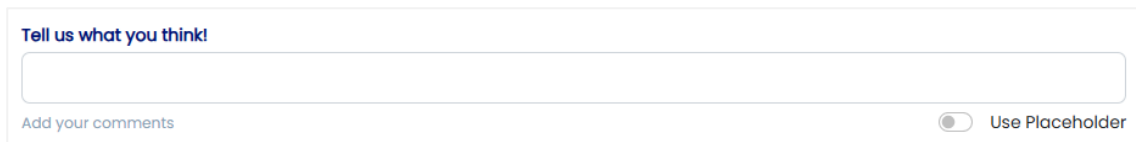
The 'Add New Field' dialog box displays a grid of 18 field types. The first three options, 'Text', 'Text Area', and 'Rich Text', are highlighted with yellow borders. The other options include Radio, Checkbox, Select, Email, Name, Phone, Number, Date/Time, Address, ID Number, File Upload, Matter, and Currency. A 'Cancel' button is located at the bottom center.

3.1 Text Field

Displays a single-line field for text entry.

- Used where the answer is expected to be brief.
- Filler can enter unlimited characters, but only one line of text will be visible.

In a finished form, a text field looks like this:



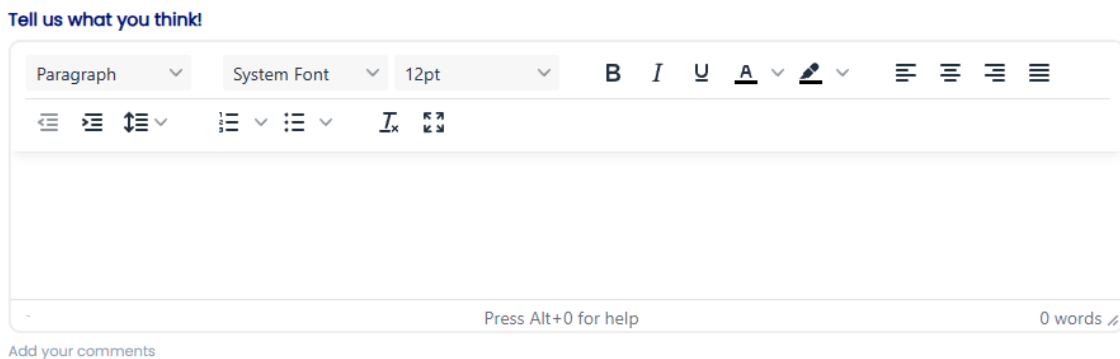
The image shows a text field within a form titled 'Tell us what you think!'. The field is a single-line input box with the placeholder text 'Add your comments'. To the right of the field is a toggle switch labeled 'Use Placeholder', which is currently turned off.

3.2 Text Area

Displays a multi-line field for text entry.

- Used where the answer is expected to be lengthy.
- Filler can enter unlimited characters and the field can expand to reveal full text.
- Option to enable rich text and allow filler to apply formatting within the field.

In a finished form, a text area field with rich text enabled looks like this:



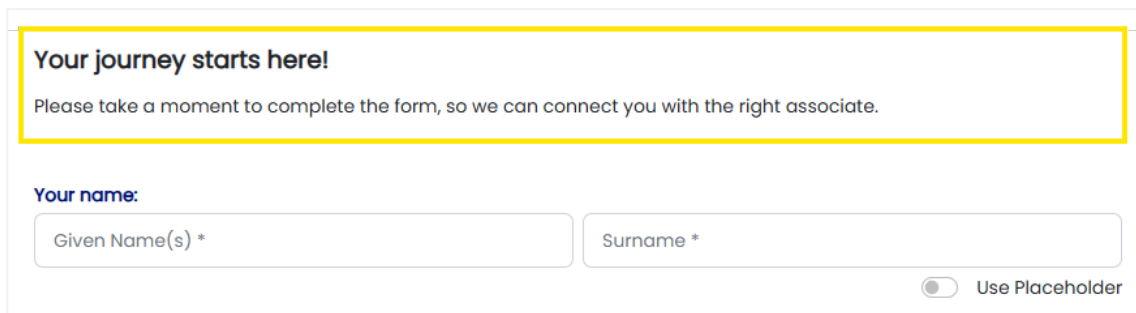
The screenshot shows a text area field titled "Tell us what you think!". Above the text area is a rich text toolbar with the following options: Paragraph (dropdown), System Font (dropdown), 12pt (dropdown), Bold (B), Italic (I), Underline (U), Text Color (A with dropdown), Background Color (color picker), Bulleted List, Numbered List, Decrease Indent, Increase Indent, Link, and Unlink. Below the toolbar is a large text area. At the bottom of the text area, there is a status bar that says "Press Alt+0 for help" and "0 words". Below the text area, there is a placeholder text "Add your comments".

3.3 Rich Text

Build a guidance note to the filler within the form.

- Ability to format text, insert links and images.
- View only, no input required by filler.

In a finished form, rich text looks like this:

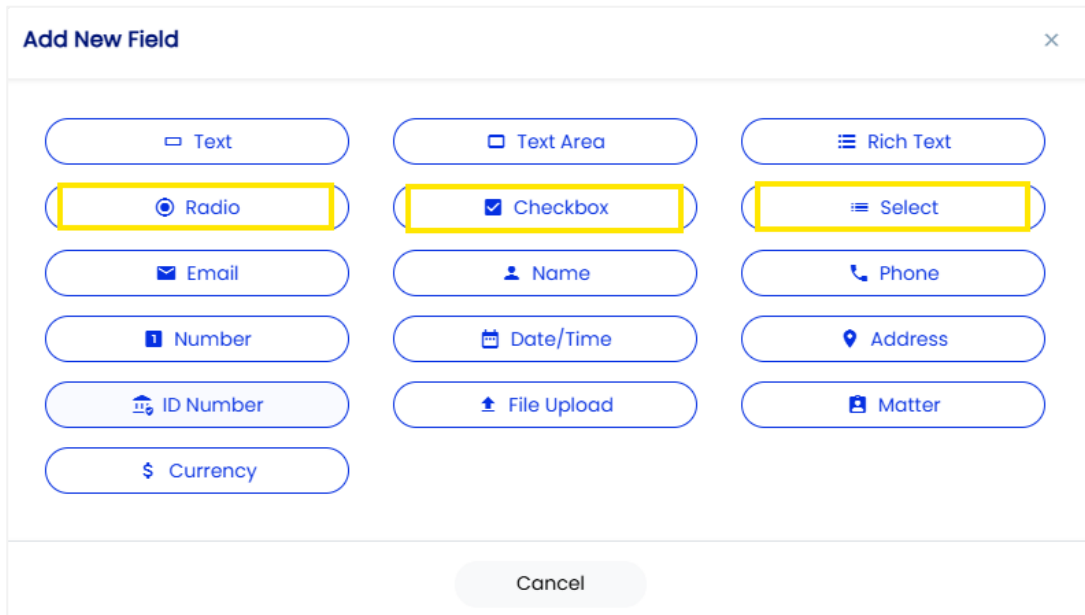


The screenshot shows a rich text field with a yellow border. Inside the field, the text "Your journey starts here!" is displayed in bold. Below this text, there is a paragraph: "Please take a moment to complete the form, so we can connect you with the right associate." Below the rich text field, there is a section titled "Your name:" with two input fields: "Given Name(s) *" and "Surname *". At the bottom right of the form, there is a toggle switch labeled "Use Placeholder" which is currently turned off.

4. Add Multiple Choice Options to Forms

When designing a form, there will be situations where a form filler is required to make a selection from a list. Option lists are used to display the available choices to the form filler.

There are 3 types of selection fields available: radio buttons, checkboxes and drop-down select lists.



The 'Add New Field' dialog box displays a grid of 18 field types. The 'Radio', 'Checkbox', and 'Select' options are highlighted with yellow borders. The 'Cancel' button is located at the bottom center.

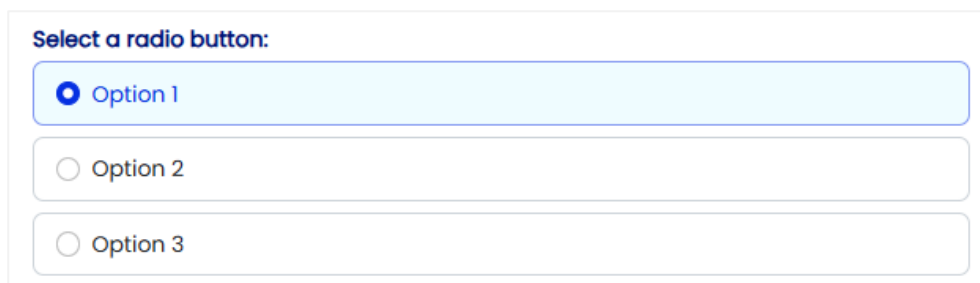
Add New Field		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="radio"/> Radio	<input checked="" type="checkbox"/> Checkbox	<input type="text"/>
<input type="email"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Cancel		

4.1 Radio Buttons

Single-select list of options.

- Used for a short list of options and options with short labels.
- Logic can be applied to control if/when an option appears.

Radio button fields look like this in the form:



The form shows a title 'Select a radio button:' followed by three radio button options. The first option, 'Option 1', is selected and highlighted with a light blue background.

Select a radio button:

☒ Option 1

☐ Option 2

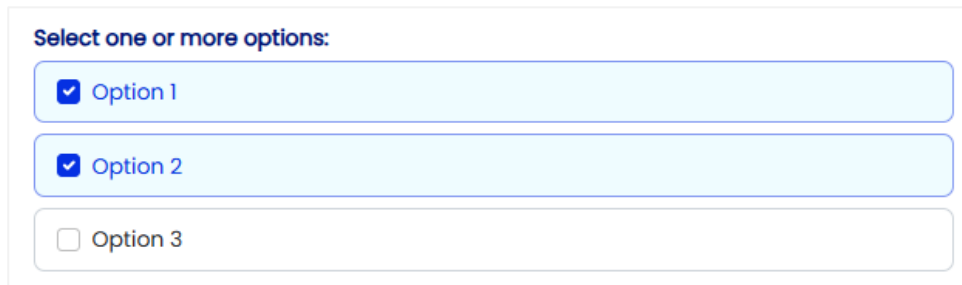
☐ Option 3

4.2 Checkboxes

Multi-select list of options.

- Used when multiple options can be selected.
- Logic can be applied to control if/when an option appears.

Checkbox fields look like this in the form:



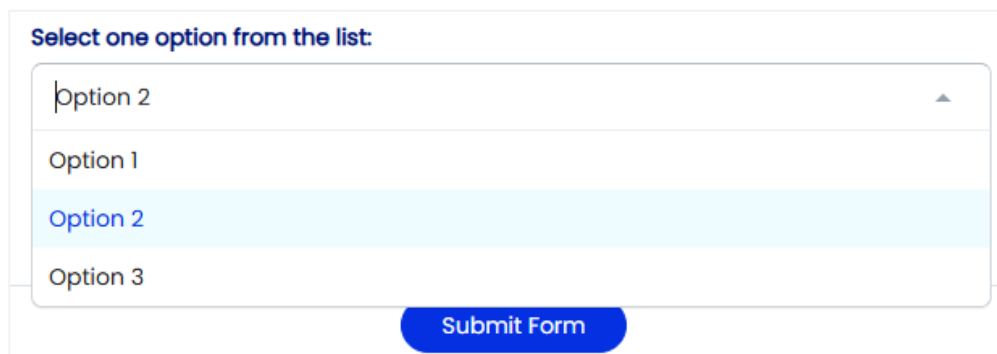
A form titled "Select one or more options:" containing three light blue rounded rectangular buttons. The first button has a checked checkbox and the text "Option 1". The second button has a checked checkbox and the text "Option 2". The third button has an unchecked checkbox and the text "Option 3".

4.3 Select

Single-select drop-down list of options.

- Used for a long list of options and options with long labels.
- Logic can be applied to control if/when an option appears.

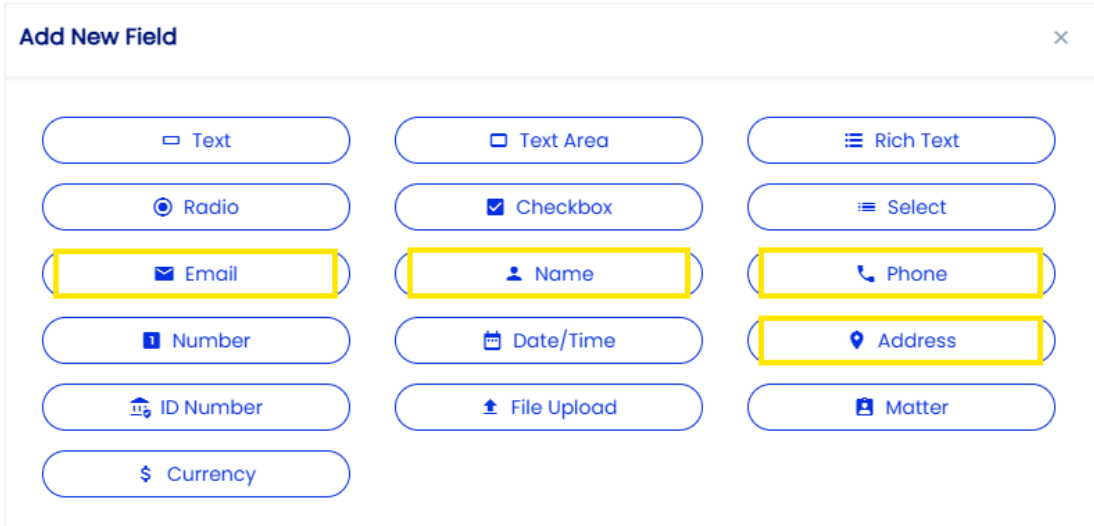
Select fields look like this in the form:



A form titled "Select one option from the list:" containing a drop-down menu. The menu is open, showing a list of options: "Option 2" (selected and highlighted in light blue), "Option 1", "Option 2", and "Option 3". Below the menu is a blue "Submit Form" button.

5. Personal Details Fields

Fields to add personal details including **Name**, **Email**, **Phone** and **Address** can be added to a form. By using the specific field type for its purpose, contact or user mapping can be applied to enable autofill in the finished form (refer to the Contact and User Mapping guide).



The 'Add New Field' dialog box displays a grid of field types. The fields 'Email', 'Name', 'Phone', and 'Address' are highlighted with yellow borders. The grid is organized as follows:

Add New Field		
Text	Text Area	Rich Text
Radio	Checkbox	Select
Email	Name	Phone
Number	Date/Time	Address
ID Number	File Upload	Matter
Currency		

5.1 Name

- Person's name.
- Separates answer into components for first, middle, given and last names.

5.2 Email

- Email address.
- Checks config of input is the correct format.

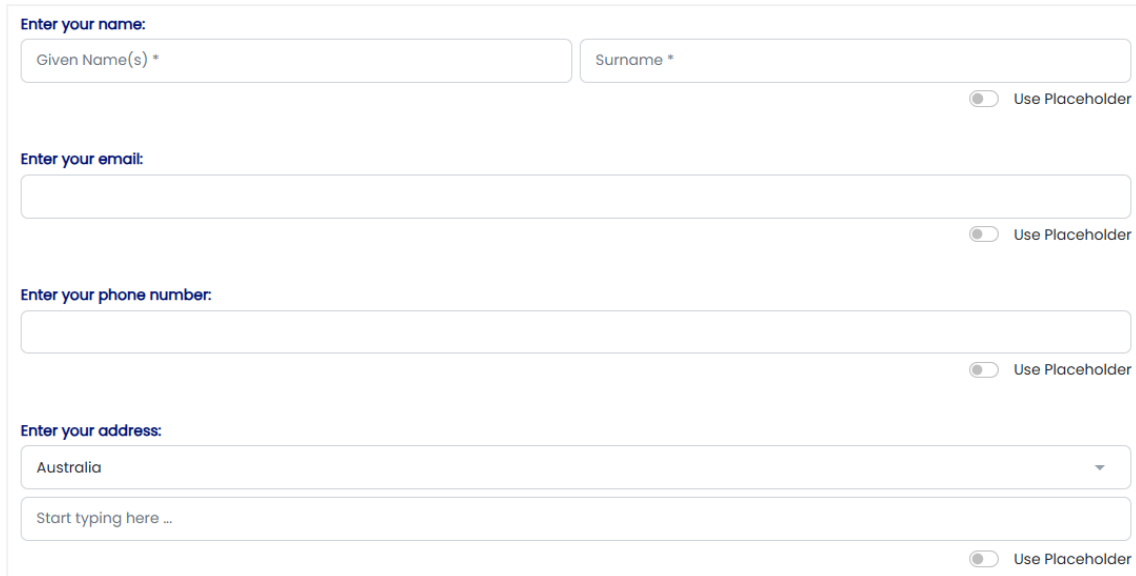
5.3 Phone

- Phone / Fax numbers.
- Limits type of characters used.

5.4 Address

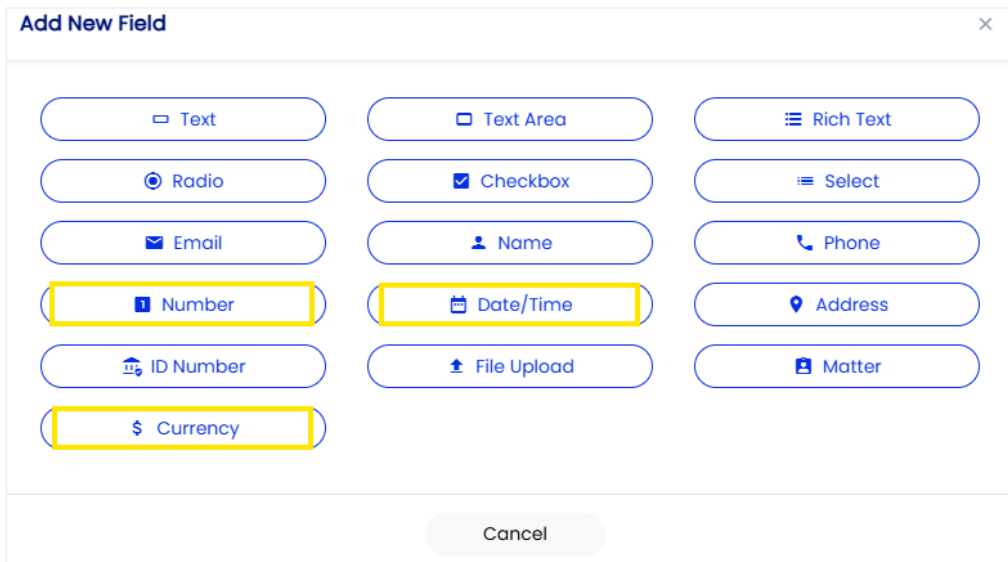
- Street or postal address.
- Connects to Google Maps for look-up and validity check.
- Separates answer into components for line 1, line 2, suburb, state, postcode and country.

In a finished form, the personal details fields described above look like this:



6. Numbers and Figures Fields

There are several fields which can be used to add a number or figure – each one has a specific use.



6.1 Number

- Numeric answer.
- Limits type of characters used.
- Apply settings for prefix, decimal places, format, rounding and convert to words.

6.2 Date/Time

- Date or time or both.
- Apply format, set limitations.

6.3 Currency

- Provides currency options.
- Used when multiple currencies are available and allows the filler to select the required currency.
- Apply decimal places, format and prefixes.
- Note: A number field would be used where a single set currency applies so that the currency and prefix is set as default and the filler doesn't have to answer an unnecessary question).

In a finished form, these fields look like this:

How long have you lived at your current address:

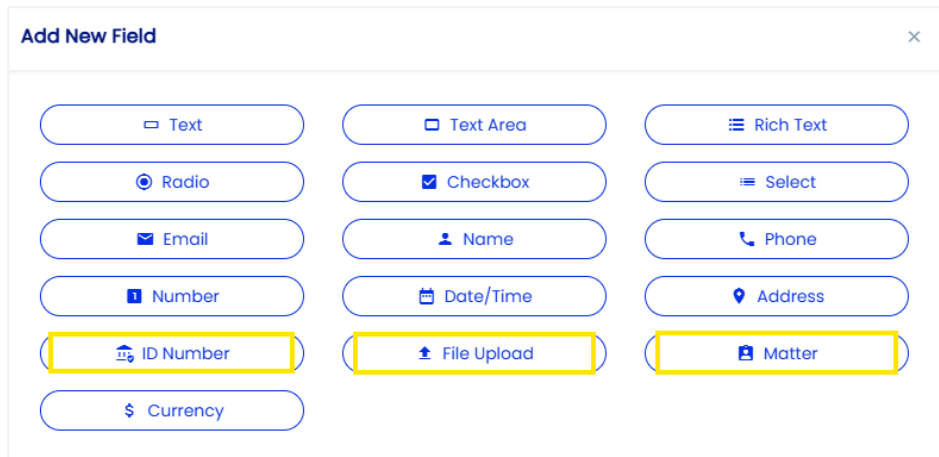
Enter the number of years you've lived at your current address. Do not include months.

Enter your date of birth:

Enter your annual gross income:

▼

6.4 Company and Document Fields



Add New Field [X]

Text	Text Area	Rich Text
Radio	Checkbox	Select
Email	Name	Phone
Number	Date/Time	Address
ID Number	File Upload	Matter
Currency		

6.5 ID Number

- Company numbers.
- Connects to ASIC for validity check.

In a finished form, the ACN lookup field will validate the number entered and display the ASIC record:

ACN:

620 560 367

TENSIS IP PTY LTD

☐ Use Placeholder

6.6 File Upload

- Image or file upload.
- Filler can select an image to upload into the body of the document or select a file/s to generate separately with the document (the uploaded file/s will be available with the original submission).
- Apply limitations to file types and number of files permitted. The limitations are:

Images: Permitted files: PNG / JPG / JPEG / SVG
 Size limit: 10MB
 A single image can be uploaded per field

Files: Permitted files: docx / pdf / txt / msg / zip - and all image files / spreadsheet files
 The maximum number of files permitted is 1000

PRO

by tensis

Uploaded files will show the name of the file selected, and uploaded images will be displayed:

Upload the attachment for the schedule of documents:



Drag & drop your files here

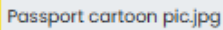
OR

Upload

Total size 28.91 KB out of 30 MB allowed



Upload a photo of the client's passport:



X



6.7 Matter

- Matter reference/number.
- Connects to the matter ID.

7. Field Properties

7.1 Question Type

There are five options applicable to a question type:

Question type

<input checked="" type="radio"/> Required	<input type="radio"/> Optional
<input type="radio"/> Read-Only	<input type="radio"/> Hidden
<input type="checkbox"/> Hide Question	

A **required field** must be filled in for the form to be submitted.

- To ensure that the flow of the document is reliable, it is recommended to set fields to required to force the filler to provide an answer for:
 - mandatory information
 - decision-making fields used in logic and conditional rules
 - fields used in calculations
- The goal of the questionnaire is to gather as much information as possible so that the automation is successful and reduces the manual changes required post docgen.
- If the filler wants to move past a question without answering, they can opt to use a placeholder and that field will appear in the Word document in yellow highlight to remind the filler to manually complete the details later, though this isn't recommended. Placeholders aren't available on all field types and fillers will be forced to enter the required data, such as dates or selection questions.

The filler can leave an **optional field** blank, and the form can be submitted.

- Only set a field to optional if you want to allow the user to ignore it. For example, not everyone has a fax number so this is a field commonly set to optional. Where an optional field has been left blank, this is taken to be acceptable and unlike a placeholder, no highlight or other alert will be applied in the Word document produced.

A **read only field** can display data to the form filler, without allowing them to touch it.

- Set a field to read only when you want the answer displayed to the form filler but not allow them to alter it. This is useful in various circumstances, e.g. where you want to display the result of a calculation so that the filler is confident the answer is correct or when a default answer has been applied that shouldn't be changed.

A **hidden field** is not visible in the form when it is being filled.

- Set a field to hidden when you don't want the field to be seen at all, EG a filler doesn't need to see the field for today's date or the result of a simple calculation, like an age field.

The **hide question** option will allow the answer to be completed but hide the question itself. This is useful where the section heading may already communicate the data required so showing the question will seem repetitive, e.g.:

Private health insurance

Private health insurance:

☐ Yes

☒ No

or

Private health insurance

☐ Yes

☒ No

Use **pre-filled retail/intake dialogue details** where the form has a related intake form and the name/email/mobile questions in the form are going to have the same answers as the intake recipient's details. By checking this box, the answers will be shared from the form to the intake and save re-keying.

Use **hide for retail/intake forms** where the form has a related intake form and a question isn't required to be answered by the intake recipient. By checking this box, the question will be hidden when the form is sent as an intake.

☐ Use pre-filled retail/intake dialogue details

☐ Hide for retail/intake forms

7.2 Case

Assign the default case for when the field is inserted into the Word template. If you need to switch the case, the Word add-in will allow you to override the default.

Note: When creating name and address fields, ensure you set the case to 'none' so that you don't automatically reformat names like McDonald or hyphenated names, such as Smith-Jones.

7.3 Supporting text

To increase the filler's success in answering fields, you can add supporting text / tool tips to a field to help the filler determine the answer and/or provide some context around the question. The supporting text will be immediately visible to help guide the filler when they see the question.

7.4 Default values

Apply a default value where you want to guide the filler to the most likely answer, or the answer is set.

For **radio and select fields**, you can assign a choice either by applying the default in the field settings or selecting the preferred answer after you have saved the field.

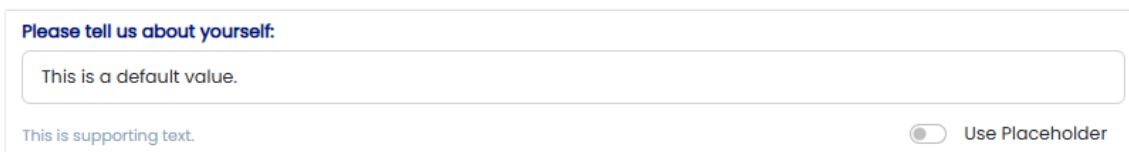
For **checkbox fields**, you need to save the field and then click the default choices in the field within the section.

For **address fields**, you need to save the field and then type the answer into the field components within the section. If you are creating an address field where the country may differ, you can just insert the country to assist the user with a more accurate Google Maps look-up.

For **currency fields**, you can assign a choice either by applying the default in the field settings or selecting the preferred answer after you have saved the field.

For all other field types, you can type the default answer in the field settings or enter it after you have saved the field.

Default values and supporting text appear like this:



Please tell us about yourself:

This is a default value.

This is supporting text.

☐ Use Placeholder

If you want to use the answer to a previous question as the default value in another field, you can insert the field ID as the default value, e.g.:

Default value

[@101429138]



7.5 Minimum / Maximum values

Set min/max values to limit the range a filler can enter. For a salary question, you may want to limit the minimum to say \$10,000 to insist on a five-digit number and ensure they don't enter an unrealistic four digit number by accidentally leaving off a '0'. Alternatively, you may want to apply a maximum cap to prevent them entering an exorbitant amount.

7.6 Minimum / Maximum characters

For text responses, set min/max characters to limit the filler to a brief answer, or force them to provide a detailed response.

For phone numbers, set the minimum characters for the length of a phone number.

7.7 Date / Time limitations

On or after: Select another date field in your form to insist that the date the filler enters is 'on or after' the date entered in the previous field. Example: a date of separation must be after the date of marriage.

On or before: Select another date field in your form to insist that the date the filler enters is 'on or before' the date entered in the previous field. Example: a date of birth must be before today.

Units: This allows you to specify the unit (minutes/hours for time - days/months/years for dates) and measure (before/after) today, to insist that the date the filler enters meets the set criteria. Example: set a due date to a minimum of 14 days from today.

7.8 ID format

Specify the type of company number to determine the format of the response.

7.9 Use as – File upload

Specify the type of upload (image or attachment) required by the question.

For an attachment, select the type of file extensions permitted and the min/max number of files allowed to control what the filler will be able to upload.

8. Referencing fields

8.1 Field order

When creating a field, you can make reference to other fields as long as they're above your field in the form layout. You can include other fields in heading text, the body of fields and as options in a selection field.

Example: You may have asked a question to gather all of the children's names and then you need to ask 'Which child?'. You can have the names of the children automatically appear in a selection list for the filler to choose from. As long as the fields are created in the correct order, you will be able to build out the list (see 8.3).

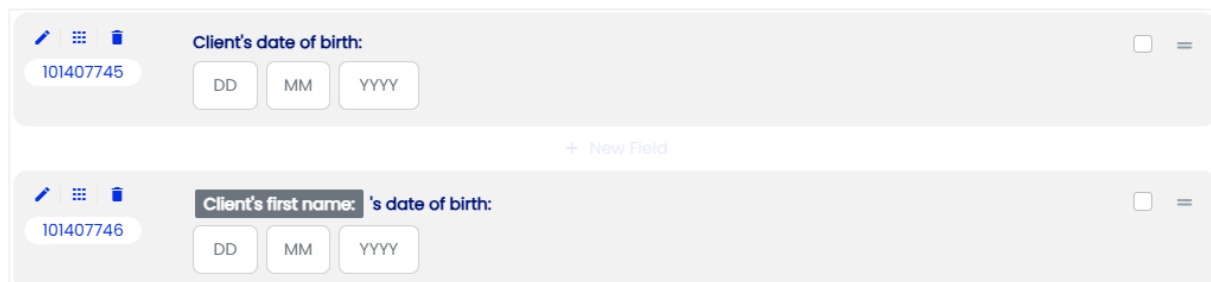
8.2 Field used in the labels of other fields

The label of a field can use the answer of another field, EG if the filler answers that the client's name is 'John', the client date of birth field can use the label of the client's name field so instead of reading 'Client's date of birth', it can display 'John's date of birth'.

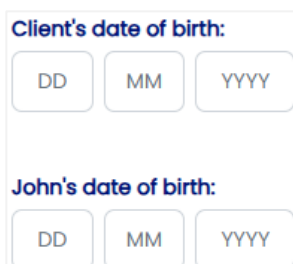
To do this, insert the field ID number of the client's name field in your label for the client date of birth field. The client date of birth field label will look something like this:

[@123456789]'s date of birth:

Here are the 2 ways the question could be asked:



Here is how each version would appear to the filler:



8.3 Fields used as list options

Field IDs can be used in the list options of radio/select/checkbox fields, EG:

1. There are questions asking 'who is the applicant' and 'who is the respondent' – then there's a subsequent question asking 'who is filing this document'.

Here are the 2 ways the filing question could be asked:



Who is filing this document? Example #1

101407738

☐ Applicant ☐ Respondent

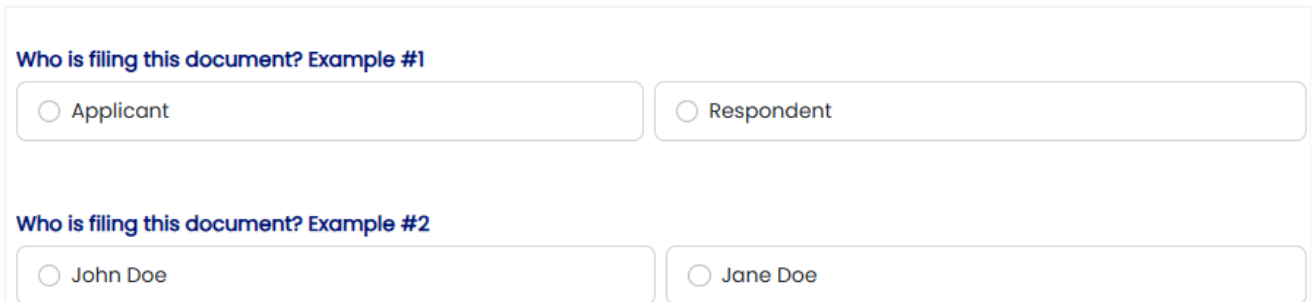
+ New Field

Who is filing this document? Example #2

101407739

☐ Applicant ☐ Respondent

Here is how each version would appear to the filler:



Who is filing this document? Example #1

☐ Applicant ☐ Respondent

Who is filing this document? Example #2

☐ John Doe ☐ Jane Doe

To achieve this, use the field IDs in your option list rather than Applicant/Respondent text, for example:



Other	Label
<input type="radio"/>	Applicant
<input type="radio"/>	Respondent

becomes

Other	Label
<input type="radio"/>	[@101407736]
<input type="radio"/>	[@101407737]

8.4 Fields used within the content of other fields

Field IDs can be used within the content/default answer of other fields.

Example: You may have questions asking for the applicant/respondent names and property address, and then you may want to use those fields in the default answer of another question, EG detailing the transfer of the property from one party to the other:

101407750

How is the property being transferred?

[@101407736] is transferring the property at [@101407751] to [@101407737].

This field is saying that:
The [applicant] is transferring the property at [address] to [respondent].

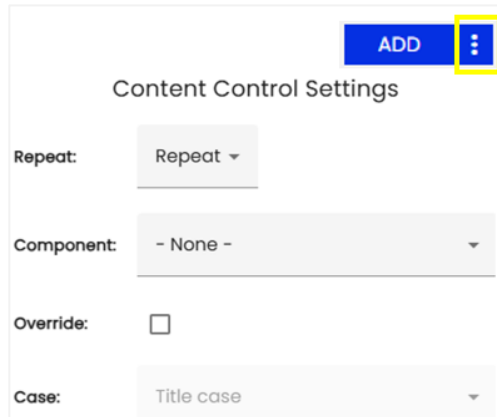
8.5 Working with fields in your template

Once a field has been inserted into your template, you can use additional features in the Word add-in to alter its behaviour. Place your cursor within the field and the Word add-in will check the type of field used and then reveal the available features, for example:

Name	Inserting a name field defaults to the full name and case you applied in the form – make adjustments by selecting the required component, EG first, middle etc, and use the override feature to adjust the case
Address	Inserting an address field defaults to the full address, case and format you applied in the form – make adjustments by selecting the required component, EG first line, suburb etc, and use the override feature to adjust the case and format
Date	Inserting a date field defaults to the case and format you applied in the form – make adjustments by selecting the required component, EG day, month etc, and use the override feature to adjust the case and format
Radio	Inserting a radio field defaults to the choice the user selects – use the override feature to adjust the case, and use a conditional rule to convert to a checkbox
Checkbox	Inserting a checkbox field defaults to the choice/s the user selects – use the override feature to adjust the case, and use a conditional rule to convert to a checkbox
Select (drop-down)	Inserting a drop-down field defaults to the choice the user selects – use the override feature to adjust the case, and use a conditional rule to convert to a checkbox

8.6 Altering fields in the template

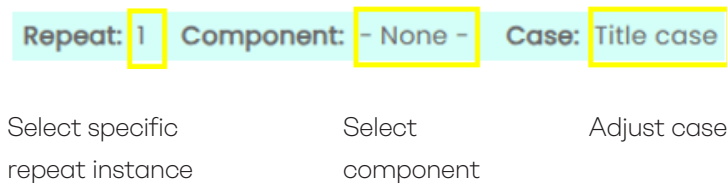
When you click on the kebab next to the 'add' button, the available features and adjustment options will be displayed, for example:



The image shows a 'Content Control Settings' dialog box. At the top right, there is a blue 'ADD' button and a kebab menu icon (three vertical dots) highlighted with a yellow box. The dialog contains the following settings:

- Repeat:** A dropdown menu currently showing 'Repeat'.
- Component:** A dropdown menu currently showing '- None -'.
- Override:** An unchecked checkbox.
- Case:** A dropdown menu currently showing 'Title case'.

Alternatively, when you click on a field, the Word add-in will reveal the same details, for example:



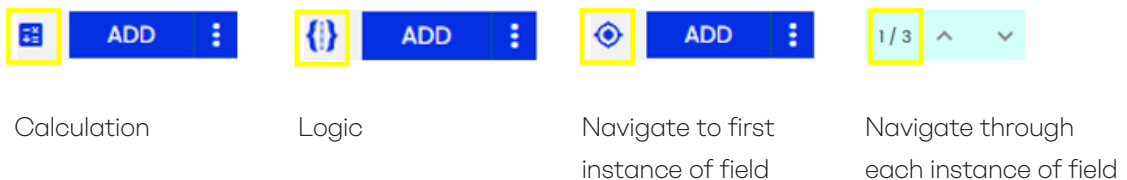
The image shows a horizontal bar with three sections, each with a yellow box around its value:

- Repeat:** 1 (with a yellow box around the number 1)
- Component:** - None - (with a yellow box around the text)
- Case:** Title case (with a yellow box around the text)

Below the bar, the following descriptions are provided:

- Under 'Repeat: 1': Select specific repeat instance
- Under 'Component: - None -': Select component
- Under 'Case: Title case': Adjust case

The field list displays icons that provide details about the field structure, for example:



The image shows four icons from the field list, each with a yellow box around it:

- Calculation:** An icon of a calculator.
- Logic:** An icon of a brain.
- Navigate to first instance of field:** An icon of a magnifying glass over a document.
- Navigate through each instance of field:** An icon showing '1/3' with up and down arrows.

Below each icon, the following descriptions are provided:

- Calculation
- Logic
- Navigate to first instance of field
- Navigate through each instance of field