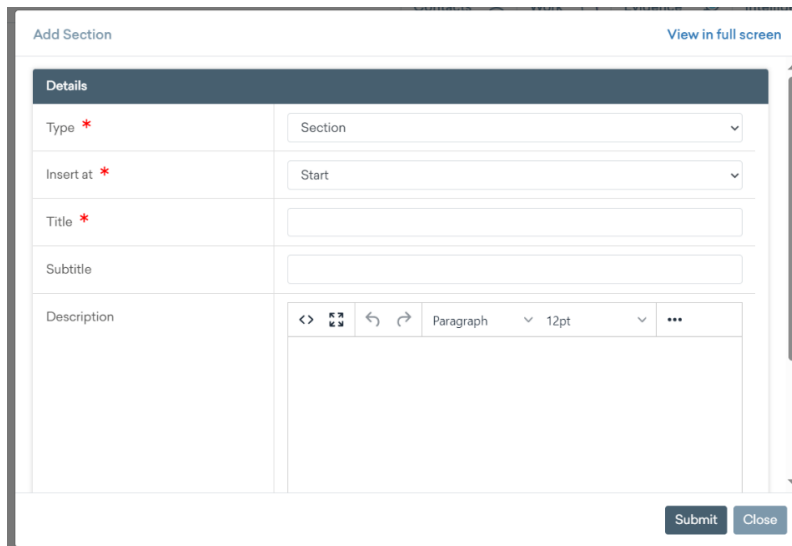# How to Configure Forms and Fields

The Forms tool enables administrators to customise registration forms within their account. Administrators can create new fields, edit or disable existing ones, and rearrange the order of the fields. Forms can also be organised into sections and pages. This guide provides step-by-step instructions on how to manage these tasks.

How to Create a New Section or Page

- Hover over **My Account** and select **Administration**.

- Under the **Configuration** subheading, select **Forms**.

- Locate the relevant section and click the pencil icon to edit it. For example, select 'Staff' if you want to add fields to the Staff registration form.

- To add a new Section or Page, click the **plus icon** and select either **Add Section** or **Add Page**.
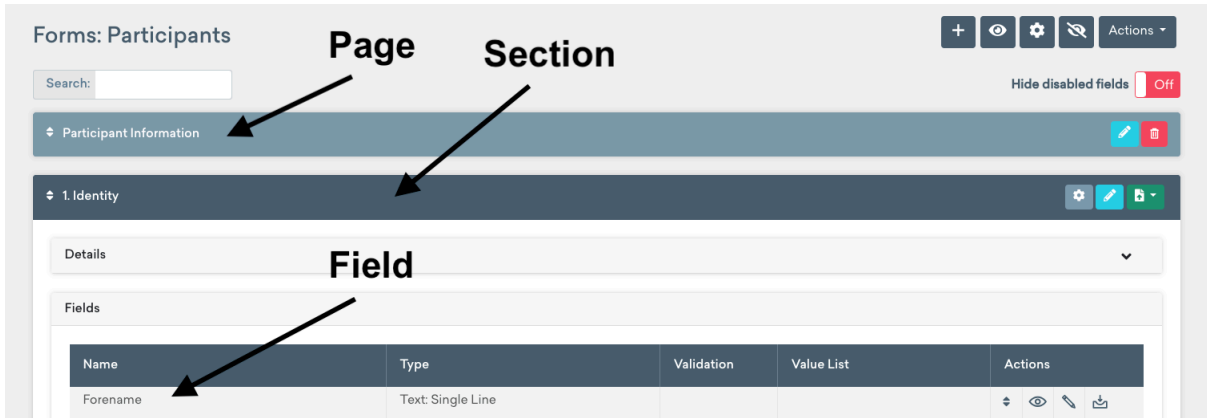

- Under **Insert at**, choose where you want the Section or Page to be placed.

- Enter the name of the Section or Page under **Title**. You can also add a **Subtitle** and **Description**, which will appear on the Questionnaire.

- Click **Submit**.

- Your new Section or Page will now appear, and you can begin adding new Fields.

How to Create a New Field

Field types define the kind of data that can be entered or stored within Views. Common field types include:

- **Text fields** for words or phrases
- **Number fields** for numeric values
- **Date fields** for dates
- **Dropdown fields** for selecting from a predefined list of options

Each field type is designed to handle specific types of information efficiently and accurately. Please see **Appendix 1** at the end of this guide for a full list of field types and their descriptions.

- Click on the **green 'Add Fields' icon** to add your field to the specific Section or Page.

- Select the appropriate **Input Type** for the new Field.
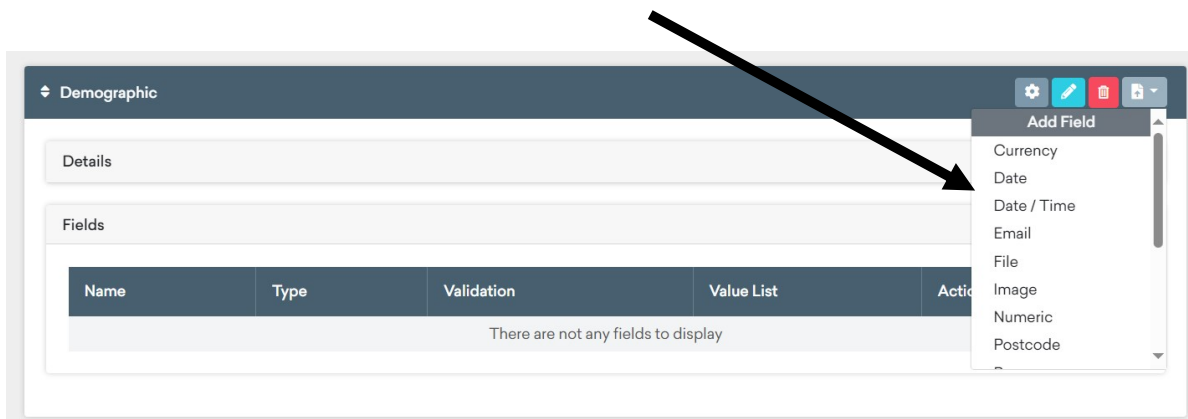
- Enter a **Name** for the field. If the field requires a **Value List**, you can either select an existing one or click **Add Value List** to create a new one.

Add Field : Selection (Single)

Details	
Name *	Gender
ⓘ Tagline	
ⓘ Value List *	123 (123) ▾ 👁
	Add Value List
ⓘ Default Value	Unset ▾
Specify "Other" Option	No

- Depending on the **Field Type**, you will have access to:

  - **Render Options**: Choose how the field will be displayed.

Render Options		
Display as *	Dropdown	
ⓘ Exclude From Numbering	No	
ⓘ Not Visible If	Unset ▾	▾
ⓘ Visible If	Participant Risk Factors (Parti... ▾	Gender identity ▾
ⓘ Visible With	Unset	
ⓘ Visible without	Unset	

- **Validation Rules**: Define how the data will be collected for this field.

Validation Rules		
ⓘ Required	No	
ⓘ Required With	Unset	
ⓘ Not Required With	Unset	
ⓘ Required Without	Unset	
ⓘ Required if	Unset ▾	▾
ⓘ Not required if	Unset ▾	▾

- A full matrix of Validation Rules can be found in **Appendix 2** at the end of this guide.

- Once you have finalised your options, click **Save** to create the field.

How to Edit a Field

- Hover over **My Account** and select **Administration.**

- Under the **Configuration** subheading, select **Forms**.

- Click the **pencil icon** next to the relevant section (e.g., 'Staff').

- Locate the field you want to edit and click the **pencil icon** next to it.

- Make the necessary changes, then click **Submit.**

How to Disable a Field

- Hover over **My Account** and select **Administration.**

- Under the **Configuration** subheading, select **Forms**.

- Click the **pencil icon** next to the relevant section (e.g., 'Staff').

- Locate the field you want to disable and click the **disable icon** next to it.

How to Restore a Field

- Hover over **My Account** and select **Administration.**

- Under the **Configuration** subheading, select **Forms**.

- Click the **pencil icon** next to the relevant section (e.g., 'Staff').

- Locate the field you want to restore and click the **restore icon** next to it.

How to Edit the Order of Fields

- Hover over **My Account** and select **Administration.**

- Under the **Configuration** subheading, select **Forms**.

- Click the **pencil icon** next to the relevant section (e.g., 'Staff').
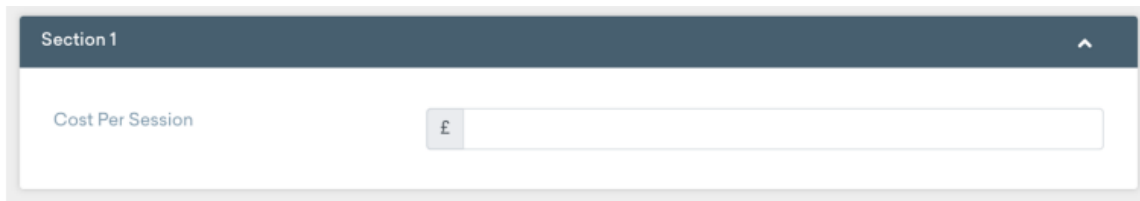
- To reorder fields, click and hold the **arrow icon** to the right of the field, then drag it to the desired position. ⬍

- To reorder sections, click and hold the **arrow icon** to the left of the section, then drag it to the desired position.
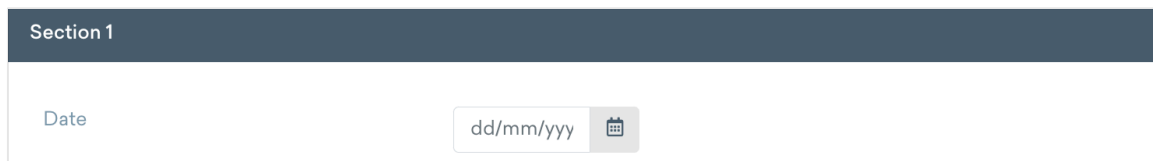
Appendix 1: Field Types

Currency

Stores monetary values, ensuring correct formatting based on the relevant currency.

Date

Captures a calendar date (e.g., DD/MM/YYYY) with date selection options.
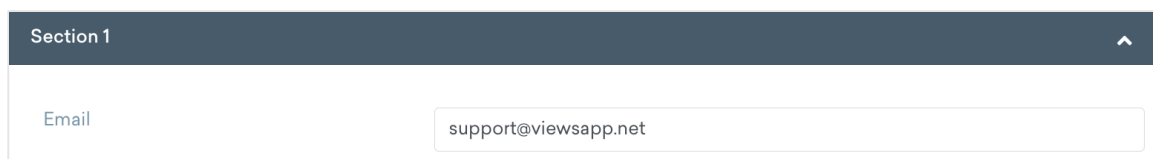
Date/Time

Stores both a date and a time value, allowing for precise timestamping.
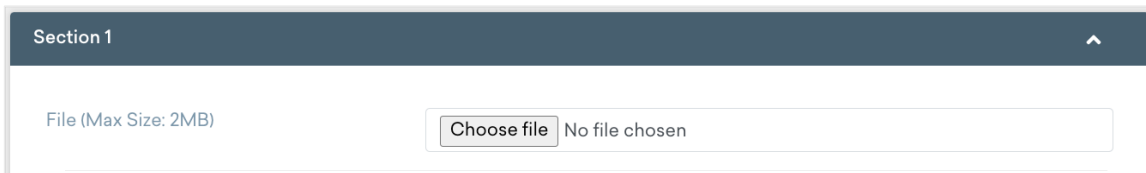
Email

Captures and validates email addresses to ensure correct formatting.
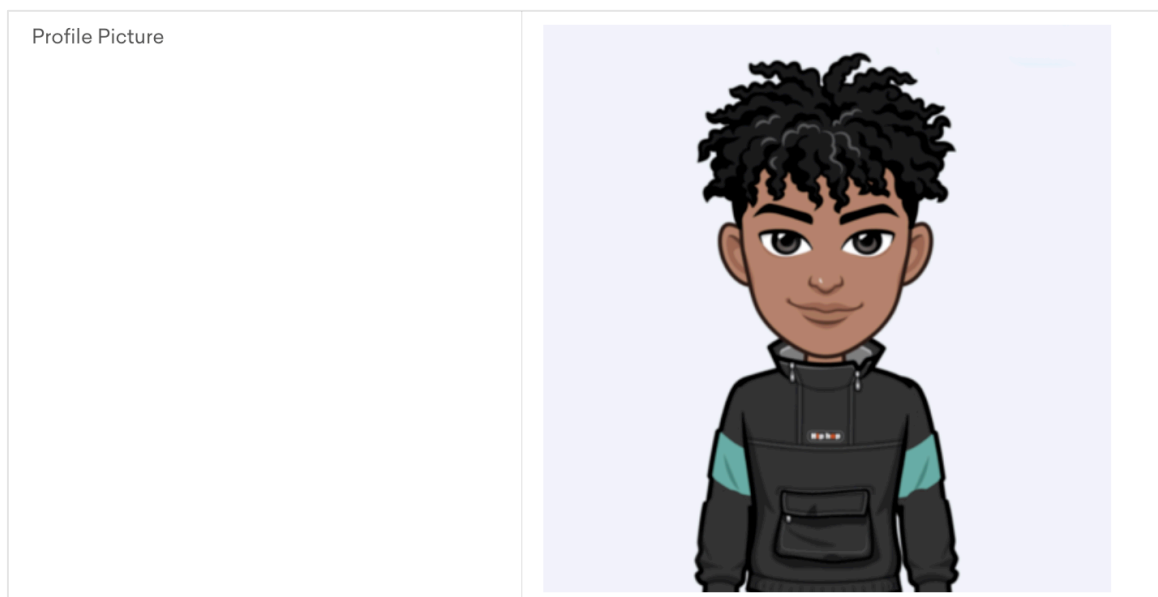
File

Enables users to upload and store files in supported formats.

Section 1	^
File (Max Size: 2MB)	Choose file No file chosen

Image

Enables users to upload image files, with preview functionality.

Profile Picture	

Numeric

Stores numeric values, ensuring only numbers are entered.

Section 1
Number Field   5 ⬍

Matrix [Questionnaires Only]

Presents a grid format where users can provide multiple responses based on row and column criteria, useful for rating scales and comparisons.

Postcode

Captures postal codes, often with validation for correct format based on region.

Range

Allows users to select a numeric value within a defined range (e.g., 1–100).

Ranking [Questionnaires Only]

Allows users to rank a list of items in order of preference or priority.

Views

Selection (Multiple)

Enables users to select multiple options from a predefined list.

Section 1	^
Selection (Multiple)	☑ Family ☑ Friends ☐ Other

Selection (Single)

Allows users to select a single option from a predefined list.

Section 1	^
Selection (Single)	○ Agree ○ Neutral ○ Disagree ○ Strongly Disagree

Statistic

Displays calculated or summarised data, derived from statistics saved in the **Intelligence** area.

Statistics	^
SG Pie	Pie Chart (with legend)
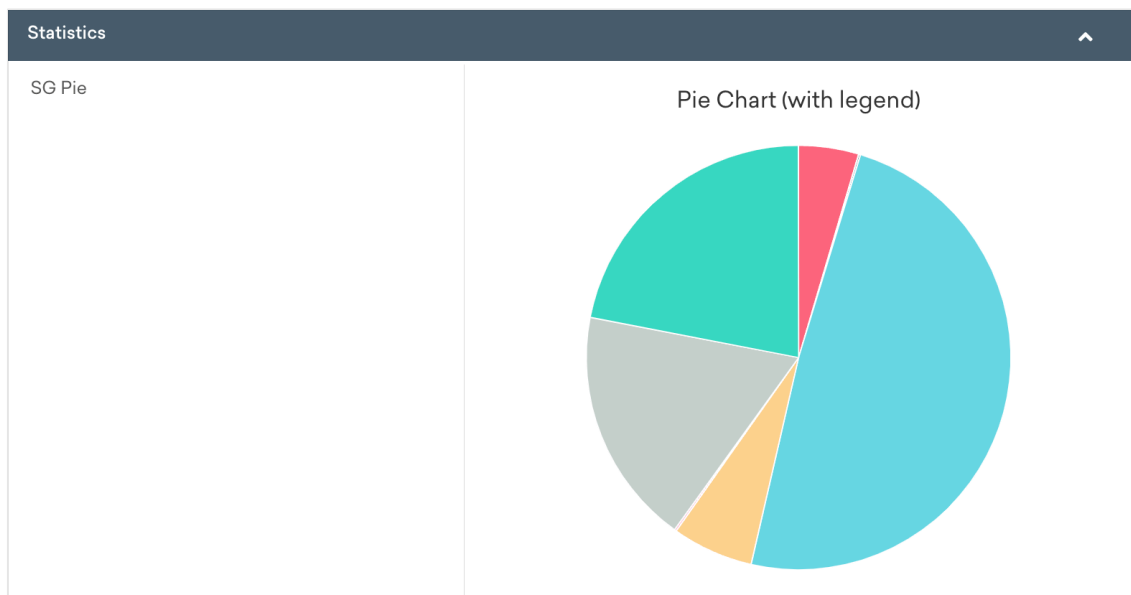
Text: Multi Line

Provides a larger text area for entering longer responses, such as comments or descriptions.

Section 1	^
Text Multi Line	

Text: Single Line

Captures short text entries, such as names or titles.

Section 1	^
Text: Single Line	

Time

Stores time values (e.g., HH:MM), often with time selection functionality.

Section 1	^
Time	--:-- 🕐

URL

Captures website addresses, ensuring proper URL formatting.

15. Website	https://www.substance.net/

Appendix 2: Validation Rules

Validation Rule	Description
Alpha	Must only contain letters.
Alpha Dash	Must only contain letters and dashes.
Alpha Dot	Must only contain letters and full stops.
Alpha Dot Dash Space	Must only contain letters, full stops, dashes and spaces.
Alpha Numeric	Must only contain letters and numbers.
Alpha Numeric Punct	Must only contain letters, numbers and punctuation.
Alpha Numeric Space	Must only contain letters, numbers and spaces.
Alpha Numeric Underscore	Must only contain letters, numbers and underscores.
Alpha Space	Must only contain letters and spaces.
Date Age From	Age on date must be older than specified age.
Date Age To	Age on date must be younger than specified age.
Date Not After	Date cannot be after specified date.
Date Not After Today	Date cannot be after today.
Date Not Before	Date cannot be before specified date.
Date Not Before Today	Date cannot be before today.
Datetime Age From	Age on date/time must be older than specified age.
Datetime Age To	Age on date/time must be younger than specified age.
Datetime Not After	Date/time cannot be after specified date/time.
Datetime Not After Today	Date/time cannot be after today.
Datetime Not Before	Date/time cannot be before specified date/time.
Datetime Not Before Today	Date/time cannot be before today.
Decimal	Must be a decimal.
Display as hyperlink	Display the URL as a hyperlink
Display as mailto: hyperlink	An email hyperlink will be added to the email when viewing the form.
Exact Length	Must contain the specified number of characters.
Exact Length if	Must contain the specified number of characters, when the specified field contains the specified value.
Exclude From Numbering	Exclude field from automatic numbering.
Ext In	Extension of uploaded file must match the listed extensions.
Greater Than	Must be greater than the specifed number.
Greater Than Equal To	Must be greater than or equal to the specifed number.
Increment	Specify a number that the value should be in increments of.
Integer	Must be an integer.
Is Image	Must be an image file type.

Is Natural	Must be a natural number.
Is Natural No Zero	Must be a natural number and cannot contain 0.
Is Numeric Non Zero	Must be numeric and cannot contain 0.
Less Than	Must be less than the specifed number.
Less Than Equal To	Must be less than or equal to the specifed number.
Max Dims	File dimensions must not exceed the specified pixel value (width x height).
Max selection	Set the maximum number of values that can be selected.
Max Size	File size must not exceed the specified value (MB).
Maximum length	Cannot contain more than the specified number of characters.
Min selection	Set the minimum number of values that must be selected.
Minimum length	Cannot contain less than the specified number of characters.
Must differ from	Must differ from the value contained in the specified field.
Must match	Must match the value contained in the specified field.
Not required if	Not required when the specified field contains the specified value.
Not required with	Not required if data is entered in the specified field.
Not visible if	Not visible when the specified field contains the specified value.
Not visible with	Not visible if data is entered in the specified field.
Real Url	Must contain a real URL.
Required	Field is always required.
Required if	Required when the specified field contains the specified value.
Required With	Required if data is entered in the specified field.
Required Without	Required if data is NOT entered in the specified field.
Richtext	Determines if the text box should be richtext enabled.
Rows	Number of rows to display in the text box.
Tagline	Add a tagline to provide more information about the field.
Time Not After	Time cannot be after specified time.
Time Not Before	Time cannot be before specified time.
Unique	Must be unique and cannot match any other record.
Valid Email	Must contain a valid email.
Valid Emails	Must contain valid emails, separated by a comma.
Valid Ext	Uploaded file must have a valid extension.

Valid Ip	Must contain a valid IP address.
Valid Phone Number	Must contain a valid phone number.
Valid Postcode	Must contain a valid postcode.
Valid Uk Postcode	Must contain a valid UK postcode.
Valid Url	Must contain a valid URL.
Value List	Select the value list to use for this field.
Visible If	Visible when the specified field contains the specified value.
Visible With	Visible if data is entered in the specified field.
Visible Without	Visible if data is NOT entered in the specified field.