Fields, Field Types, and Field Modification

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Fields

In computer science, a single piece of data that has several parts, known as a record, can be divided into fields (data fields). Relational databases arrange data as sets of database records, so called rows. Each record consists of several fields; the fields of all records form the columns. Examples of fields: name, gender, hair color.

Within Fluxx, there are several different "types" of fields that determine what data can be entered into a given field and how it displays (both to Employees and to outside users like Grantees and Reviewers).

A view of all of the Field Types available in Fluxx:

Type*	
	~
Text Field	
Text Area	
Number	
Date	
Date Time	
Boolean	
Model	
Select	
Amount	
Table	
Ad-hoc questions	

Note: This guide also discusses the configuration options within the Admin Panel for each different Field Type. For more information on the Admin Panel and how configurations work, please see the dedicated Admin Panel Overview Page and the Forms Menu of the Admin Panel Page.

Field Types

Text Field

A "Text Field," alternatively known as a "String field" in other databases, is a short field that can accept all ASCII characters in it, i.e. numbers, letters, and a limited number of symbols (like &, \$, %, *, ^, #, etc.). Text fields are limited to 255 characters (no exceptions to this).

An example of what a Text Field looks like in the system:

Use of Human Subjects	

Text Field Configuration Options

All field types have unique configuration options. Text Fields are some of the **least configurable** of all field types. See descriptions of the items boxed in the screenshot, below, for the options of what **can** be configured with Text Fields.

les V All states V All kinds V Draft Active		Preview	*
ructions		(list view)	Field
t: Before you begin, please read through the 2022 PERC COVID-19 Request for Applications and the Grantee Reference Guide, both of while	🗈 🖪 🗹 :	Text: {{ model Text: Amended	Field request_primary_topic_other (request_primary_top
le stage application)	6 B C :	(header) Text: {{ model	Label If Other, please explain:
ject Details		Group Text: Request	Required
trategic Grant Application		Text: Request Text: Request	Advanced
Project Title		Text: Grant St Text: Grant St	Copy Element
Amount Requested		(grantee)	
Length of Project (In Months)		Status	
Anticipated Start Date		(status and toc) Table of Conten	
roject Details		Organization Info	
Primary Topic		Organization Primary Contact	
(primary topic other show)		Primary Signat Project Staff 1	
If Other, please explain:	🖻 🖪 🗹 🗄 1	Project Staff 2 Project Staff 3	
Research/Education Classification		Key Grant Inform Text: Creation	
Urban/Rural?	6 B C :	Instructions Text: Before yo	
Counties Impacted		(single stage app	
	6 B C :	Project Details Strategic Gra	
Text: Please indicate where you intend to conduct project activities. This could be where your research will be based, outreach activi		Project Title	
Text: Please indicate where you intend to conduct project activities. This could be where your research will be based, outreach activi Counties Impacted		Amount Req	

- 1. Box # 1: Shows the field that's currently selected from the Builder menu, in this case, a Text Field.
- 2. Box # 2: Shows the first piece that's configurable about Text Fields, the Label. Like with all fields (and components), this Label can be changed /made different for each different form that this field lives on. This can be useful if you want to ask the same question with slightly different wording for different grantees (i.e. one wording for PERC and one wording for OAC).
- 3. Box # 3: Shows the "Required" box. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 4. Box # 4: Shows the Delete button. This will remove the field from the Form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Text Area

A "Text Area" field is very similar to a "Text Field" except that there is NO CHARACHTER LIMIT by default (see here and here for more information on this). Additionally, "Text Areas" can also be configured to allow for Rich Text Editing, e.g. being able to **bold**, *italicize*, <u>underline</u>, or make various other formatting changes to the text. Text Areas are recommended for longer-form answers that are likely to exceed 255 characters in length (and are therefore unsuited for a Text Field).

An example of what a Text Area (with Rich Text Editing enabled) looks like in the system:

Project Summary

T:	в	i	<u>u</u>	s	S¹	S,	:=	F		5	Ç
Testi	ng										

Text Area Configuration Options

Text Areas have more configuration options that Text Fields. See the screenshot below and the descriptions underneath to see what configuration options are available for Text Areas.

		📮 Preview 着	Kind
All states V All kinds V Draft Active			Field
Application co 115		(list view)	
		Text: {{ model	Field
pacer		Text: Amended	additional_collaborators (additional_collaborators)
ollaborators	6 B Z	(header)	Label
		Text: {{ model	Project Collaborators
Text: Please list collaborators in the following format:Last Name, First Name, Degree, Title, Organization		Group	Required
Spacer		Text: Request	
space		Text: Request	Optional Description
Project Collaborators	B B C : 1	Text: Grant St	
		Text: Grant St	
mpliance & Trade Secrets		(grantee)	
		Text: Please n	
Compliance		Status	
		(status and toc)	Allow Rich Text Editing
Use of Human Subjects		Table of Conten	Merge edit history on workflow cl
(show human subjects)		Organization Info	Character Limit (Optional)
(show human subjects)		Organization	character Linit (Optional)
Use of Human Subjects Protocol # or Explanation		Organization	
		Primary Contact	 Advanced
Use of Animal Subjects		Primary Signat	Copy Element
		Project Staff 1 Project Staff 2	
(show animal subjects)		Project Staff 3	
		Key Grant Inform	
Use of Animal Subjects Protocol # or Explanation		Text: Creation	
		Instructions	
Use of Biological Materials		Text: Before yo	
(show biological material)		(single stage app	
(snow biological material)		Project Details	
Use of Biological Material Protocol # or Explanation		Strategic Gra	
		Project Title	
Use of Radioactive Material	6 B C :	Amount Req	
		Length of Pr	
(show radioactive material)		Anticipated	
	BRZ	Project Details Primary Topic	😑 Delete 💈 📑 Save

1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Text Area.

- 2. Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Text Area on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).
- 3. Box # 3: Shows the "Required" box. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 4. Box # 4: Shows the Optional Description text area. When text is entered here, it will appear in *italics* underneath the Text Area's Label. This can be useful for providing additional context for the Grantee about what they should be writing in this field.

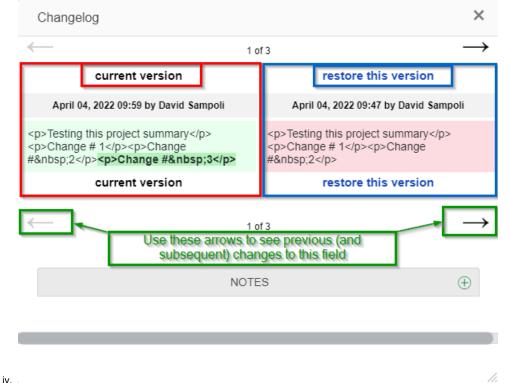
a. A screenshot of what the Optional Description looks like when configured:

ptional Description
5
5

- 5. Box # 5: Shows the Enable Rich Text Editing checkbox. As discussed earlier in this section, when this checkbox is selected Rich Text options like bolding, *italicizing*, <u>underlining</u>, etc. become available for the text within this specific Text Area. This is useful for fields where a Grantee might want to emphasize certain portions of their text or need certain special text characters/place (e.g. subscripts or superscripts, which are often needed for scientific writing).
- 6. Box # 6: Shows two closely related configuration options: Track changes and Merge edit history on workflow change.
 - a. When checked, Track Changes will display a small icon next to the Field Label which displays the number of changes that have occurred in this field since Track changes was selected (or, if Track changes was always selected for this field, since editing began). When clicked, a Changelog screen will pop up showing the user the exact changes made in the field.
 - i. Example screenshot of what the Track changes icon looks like next to the Field Label:

3 Project Summary:	Button showing tracked changes on the field
Change # 1	
Change # 2	
Change # 3	
ii. iii. Example screenshot of the Changelog screen that p	ops up when the "3" icon from above is clicked. On the le

iii. Example screenshot of the Changelog screen that pops up when the "3" icon from above is clicked. On the left (boxed in red) you'll see the current version of the field, and on the right (boxed in blue) you'll see the previous version of this field (which you can restore using the button "restore this version." Additionally, you can use the arrows found in the Changelog screen in order to see previous (and subsequent) changes to/versions of the field.



b. When checked, the Merge edit history on workflow change checkbox modifies how Track changes functions. Essentially, if this option is turned on, any Workflow change (i.e. any status update, moving the record from one Status to another e.g. submitting an application and thereby moving it from the status of "LOI Draft" to the status of "Eligibility Review") will result in the Track changes icon being cleared and will restart the versioning/tracking of changes from when the record first moved into its new status.

- i. However, as always, all changes are always tracked within the record audit trail (so information is never lost even when this Configuration option is selected).
- 7. Box # 7: Shows the Character limit (optional) numeric configuration field. This configuration options allows you to enter a number (only
 - numbers are accepted) that will act as the hard character limit for this Text Area. "Characters" include letters, numbers, symbols (e.g. #, \$, %, ^, &, etc.), and spaces. a. In general, Fluxx assumes ~5 characters per word, so if you would like to use this field as a "Word limit" you can multiply the number of
 - a. In general, Fluxx assumes ~5 characters per word, so if you would like to use this field as a "Word limit" you can multiply the number of words you'd like the response to be limited to by 5 (e.g. if I want a word limit of 100 words x 5 average characters/word = ~500 character limit).
- 8. Box # 8: Shows where you can **Delete** this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Number Field

A "**Number**" field, alternatively known as an "Integer" field in other databases, is a field where only **integers** (i.e. whole positive numbers, no negative values, no decimals, no fractions). No symbols or text can be entered in this field.

An example of what a Number Field looks like in the system:

Number field	12

Number Field Configuration Options

Number fields have a short list of configuration options. See the screenshot and the descriptions of the boxed items there within below.

les V All states V All kinds V Draff Active		Preview	Kind
rant Ends At (auto-calculated)	6 B Z :	(list view)	Field
irant Closes At		Text: {{ model	Field
		Text: Amended	calendar_year_awarded (calendar_year_awarded) -
riginal Project End Date		(header)	Label
displays after approval)		Text: {{ model Group	Calendar Year Awarded
		Text: Request	Required
Grant Agreement Date		Text: Request	Max value
Calendar Year Awarded	G 🖪 🗹 🕴 1	Text: Request Text: Grant St	
		Text: Grant St	Min value
ard Information	G B C	(grantee)	
		Text: Please n	Numeric range
rogram		Status	 Advanced
und		(status and toc) Table of Conten	Copy Element
		Organization Info	
und:Subfund		Organization	
Iodule Type		Organization	
		Primary Contact	
/ISDM Project Number	🖬 🖪 🗹 🚦	Primary Signat Project Staff 1	
/ISDM Project Number Secondary	i 🖬 🗹 🚦	Project Staff 2	
		Project Staff 3	
ull Application Due Date		Key Grant Inform Text: Creation	
mount Recommended		Instructions	
AC Grant Amount		Text: Before yo	
AC Grant Amount		(single stage app	
ERC Grant Amount		Project Details	
nternal Program		Strategic Gra Project Title	
Kana regiun		Amount Req	
unding Sources		Length of Pr	
		Anticipated	

1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Number Field.

 Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Numbe r Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).

3. Box # 3: Shows the "Required" box. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.

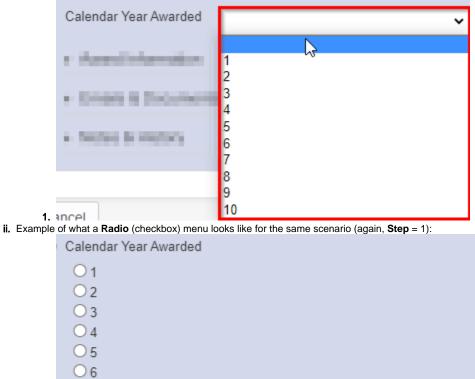
- 4. Box # 4: Shows the Max value and Min value configuration options for the number field. If the Max value and Min value are filled out (with numbers), a user will be unable to advance (e.g. Submit) a Form when the value entered in this field exceeds the Max value or is below (less than) the Min value.
- 5. Box # 5: Shows the Numeric range checkbox. Selecting this check box will make several new options appear (see screenshot below) for the field. Explanations of the new options can be found below the screenshot. In short, selecting this checkbox ensures that users cannot manually

enter in values, but instead are required to select a value from one of the options presented (turns Number Field into something more akin to a Select field). **a.** New options once "Numeric range" checkbox is selected. Please see below the screenshot for explanations of the new options:

Attributes Values	Visibility Styling
Kind	
Field	~
Field	
	alendar_year_awarded) - D 🗸
Label	
Calendar Year Awarded	
Required	
Max value	
Min value	
✓ Numeric range	Additional Options
Starting Value	
Ending Value	
Step	
Туре	
Drop-down	~
Drop-down	
Radio	
Copy Element	
	~
😑 Delete	💾 Save

- b.
- c. Starting Value: The "Numeric Range" checkbox (when selected) turns what is normally a Text Box in which only numbers can be entered into a dropdown or checkbox menu where the user must select an existing value (can't type anything in). The Starting Value is the First Value that will be displayed in as a checkbox/dropdown when the Numeric Range checkbox is selected.
- d. Ending Value: Similar to the Starting Value, the Ending Value is the Final Value (or close to it, see examples below for further explanation) that will be displayed for selection by the user.
- e. Step: The Step value is used to calculate which values in between the Starting Value and the Ending Value will be displayed. Step represents the difference between that values that the system will display to the user for selection.
 - i. For example, if my Starting Value is "1," my Ending Value is "10," and my Step is "1," the values open to selection will be: 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10.
 - ii. In the same scenario if my step is "2" instead of "1," the following values would be available for selection: 1, 3, 5, 7, or 9.
- f. Type: Determines whether the values will display as a Drop-down menu or as a Radio (checkbox) menu.
 - i. Example of what a Drop-down menu looks like for the scenario from point "e." (with the Step = 1):

○7 ○8 ○9 ○10



6. Box # 6: Shows where you can **Delete** this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Date Field

As the name implies, a **Date Field** allows for users to enter a valid date; additionally, a calendar comes handy with this field type so that users can see the day of the week when selecting a date (or just use the calendar to click on the desired date).

An example of what a Date Field looks like in the system:

1.

Anticipated Start Date	8/19/	2021	Ţ			Ē	
	0	Aug		2	021		0
in the second se	SU	MO	TU	WE	TH	FR	SA
And the second sec	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
_	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31				

Date Field Configuration Options

Date Fields have a very short list of configuration options. Please see the screenshot and below it for descriptions and explanations of what the configuration options are.

m Builder	Attributes Volues Ve	
	- • •	
gnals	(list view)	
ue Diligence	Text: { (model Field	
ie biligence	Grant Begins At (grant_begins_at) - CORE
Charity check		
	Start Date	
eviewers	Image: Section of the section of t	
Reviewers	Text: Request Year Range	
	Text: Grant St	
ant Terms Information	Bithday	
	Z h al work Element	
itart Date		
	(status and toc)	
ind Date	E E Z Status	
	Table of Conten	
displays after approval)	G 🗈 🗹 : Organization Info	
	Organization	
Grant Agreement Date	Crganization Organization	
Calendar Year Awarded	Primary Contact	
Calefual Teal Awarded	Primary Signat	
	Project Staff 1	
ard Information	Project Staff 2	
ard Information	Project Staff 3	
mount Recommended	(loi and full)	
indent Neconimented	LOI (Stage 1 of	
unding Sources	Project Title	
	Project Summ	
pacer	Amount Requ	
	Duration (in	
eports (Legacy)	Anticipated St	
	Grant Closed	
pacer	Grant Ends At	
	Primary Topic	
ayments and Refunds (Legacy)	i li 🗹	
	If Other, ple	
nails & Documents	Earliest Timef	
	Keywords (Le Delete 5	💾 Save

1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Date Field.

 Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Date Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).

3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.

- 4. Box # 4: Shows the Year Range dropdown selection option. The two options are: Normal and Birthday.
 - a. A Normal Year Range means that any date can be selected (past, today, future).
 - **b.** A **Birthday** Year Range means that any date **through the end of the current calendar year** can be selected (so past, today, future up to December 31st of the current year).

5. Box # 5: Shows where you can Delete this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Date Time Field

Date Time fields are similar to date fields, but are stored as UTC then formatted based on the current user's time zone. General recommendation is NOT to create fields of this type and to use Date Fields instead.

An example of what a **Date Time** field looks like in the system:

Date Time Field



Date Time Field Configuration Options

The configuration options for Date Time fields are exactly the same options as for a **Date Field**. Configuration options are shown in the screenshot below with explanations laid out beneath the screenshot. **Note**: Again, these are the same options as for the **Date Field**, but repeated here for emphasis.

orm Builder	Attributes Visibility	Styling
profiles V All states V All kinds V Draff Active	📮 Preview 🍦 Kind	
	Field	~
Date Time Test Field	(list view) : Field Text: {{ model	
Population Impacts	Date Time Test Field (date_time_test_field)	~
	Text: {{ model	2
Racial and/or Ethnic	Group Date Time Test Field	
PERC - Geographic Impact	E L Z	3
	Text: Request Year Range	4
County Served	Text: Grant St Normal	~
Underserved Populations		
onderserved Populations	(grantee) Advanced Text: Please n	
Gender	a b C	~
ter Course		
Age Groups	Table of Conten	
	Organization Info	
Full Application (Stage 2 of 2)	G B Z : Organization	
	Organization	
Geographic Impact	Primary Contact Primary Signat	
Use of Human Subjects	Printey Syntac.	
	Project Staff 2	
Perc use of animal subjects	Project Staff 3	
Use of Biological Material		
	LOG (JUSPE 1 0	
Use of Radioactive Material	Project Title Project Summ	
(show human subjects)	Amount Requ	
	Duration (in	
Use of Human Subjects Protocol #	Grant Closed	
	Grant Ends At	
(show animal subjects)	Primary Topic	
Use of Animal Subjects Protocol #	i Bi 🗹	
(show bio material)	Earliest Timef	ave

- 1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Date Time Field.
- Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Date Time Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).
- 3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 4. Box # 4: Shows the Year Range dropdown selection option. The two options are: Normal and Birthday.
 - a. A Normal Year Range means that any date can be selected (past, today, future).
 - b. A Birthday Year Range means that any date through the end of the current calendar year can be selected (so past, today, future up to December 31st of the current year).
 - c. Note: Since Date Time Fields require a user to manually type in the date, these settings have essentially no effect. You can type in a date far in the future (past the end of the current calendar year) even using the **Birthday** settings and the system will allow this.
- 5. Box # 5: Shows where you can Delete this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Boolean Field

Boolean fields are fields that have can only have 2 possible values – True (1 by default) and False (0 by default). **Boolean** fields can either be displayed as a checkbox (where Checked = true and unchecked = false, default being blank or false) **OR** as a dropdown (with no value being selected by default and "Yes" and "No" being the dropdown options by default).

An example of what a Boolean checkbox field looks like in the system:

True?

An example of what a Boolean dropdown field looks like in the system:

True?		~	
	Yes No		

Boolean Field Configuration Options

See the screenshot below for the configuration options available for **Boolean** fields. Beneath the screenshot you can find descriptions of each of the Boxed settings.

les V All states V All kinds V Draft Active Cwc		Preview	Kind
	1	(list view)	Field
		(list view) , Text: {{ model	Field
firmations?		(header)	Digital Checkbox (digital_checkbox) - DYNAMIC
pplication Resubmission (200 words)	6 B C :	Text: {{ model	Label
		Group	I certify that everything is correct and I will update W
o you believe any of your submission is a trade secret or includes proprietary information?		Text: Request	Required
ext: I certify that I am the Principal Investigator on this proposal and understand that by checking the adjacent box and by clicking the ""		Text: Request	Required at State
xt. I terdiy that I am the Philipai Investigator on this proposal and understand that by thetking the adjatent box and by theking the		Text: Grant St	
certify that everything is correct and I will update WPP if anything changes.	682	1 Text: Grant St	LOI Draft Eligibility Review
		(grantee)	First External Revie Full Application
ease write in your name as a digital signature confirming the above.	6 B C :	Text: Please n	Full Application Rev Second External Re + <
		(status and toc)	
cuments)		Status	Туре
oi documents)	682	Table of Conten	Checkbox
n documents)		Organization Info	True Value Label
Letter of Interest	6 B C ;	Organization	
		Organization	e1. 111
Abstract		Primary Contact	False Value
Biographical Information	6 B C :	Primary Signat Project Staff 1	
ologi aprilicar tirrormation		Project Staff 2	Note: The required state means the checkbox be checked for this boolean field.
		Project Staff 3	be checked for this boolean field
ionfidentiality doc)		(loi and full)	 Advanced
Confidentiality Form Upload		LOI (Stage 1 of	Copy Element
		Project Title	
ull documents)		Project Summ	
an occurrency		Amount Requ Duration (in	
Impact Statement	6 B 2 :	Anticipated St	
		Grant Closed	
Narrative	6 B C :	Grant Ends At	
Budget	6 B C :	Primary Topic	
undêr.		(primary topic	
Budget Narrative	6 B C :	If Other, ple	
budget handuve		Earliest Timef	

1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Boolean Field.

 Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Boolea n Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).

3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.

4. Box # 4: Shows the dropdown options for Boolean Type. The two available options are: Checkbox and Dropdown.

- a. Checkbox: Displays a checkbox that can be checked (equivalent to "Yes" by default) or left blank (equivalent to "No" by default).
 b. Dropdown: Displays a dropdown menu where blank is the default response (neither "Yes" nor "No") and the dropdown options are "Yes" and "No" by default.
- c. See the above section "Boolean Field" for examples of what these two different types look like on a form.

5. Box # 5: Displays where you can configure the True Value Label and the False Value Label.

- a. This is used when the Type is set to Dropdown to determine how the dropdown values will display.
- b. If the type is checkbox, these values won't be displayed to the User (since the interface is just the checkbox to click or unclick, with text next to the checkbox configured by the field Label see Box # 2's description).
 - i. However, if you are using this field for If/Then (AKA Hide/Display) logic within a Group Configuration, then you need to use the label's configured as the Value. Basically, editing the True/False Value labels for a checkbox will change how the value is st ored on the backend (i.e. if I enter the True Value Label as "Absolutely," clicking the checkbox will store the value on the backend as "Absolutely" and the If/Then (or the Hide/Display) logic will key off of the value of "Absolutely" to determine if the group should be shown or not.
- 6. Box # 6: Does not display an actual configuration option, but the text here is very import to understand how Boolean Fields work when they are configured as a Checkbox and is Required.
 - a. The text states: "The required state means the checkbox must be checked for this boolean field."
 - b. Essentially, this means the user will have no choice EXCEPT to select the Checkbox if the Boolean is setup as a checkbox and is required. Otherwise, the user will be unable to advance the record to the next workflow status (e.g. won't be able to submit their application).
- 7. Box # 7: Shows where you can **Delete** this field from the form. **Note**: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Model Field

A Model field is one that links from the parent record type to another. For example, if we wanted to designate on a Grant Application the employee (w ho would be a User) that should review the application, we could make a Model field on Grant Requests that links to the "User" record type. Model fields will search records in the linked record type to allow for a direct link from a record of one type to a record of the linked type.

An example of what a **Model Field** looks like in the system:

User Name	Jon	
	Jon <	

Model Field Configuration Options

Model fields have a short list of configuration settings that determines **which field** on the linked record type is displayed for selection in the Model Field and allows you to **filter** on which records should be available for selection. Please see the screenshot below for the configurable settings and beneath the screenshot for the descriptions of those settings.

Form Builder	Attributes Attributes	 Visibility Styling
	Field	~
Keywords (Legacy)	Image: Second	
Research/Education Classification	C E Z : (header)	del_user_field) - DYNAMIC 🗸
Research Education Classification	Text: {{ model	2
Social Determinants of Health	Group Full Name (full_name))- CORE
	Text: Request	
Amount	Text: Request	
Ad-Hoc Question	Image: Second	3
	Text: Grant St Model User Field	
Date Time Test Field	G B C : (grantee)	4
Model User Field		🔟 🗆 Add "Not" Qualifier 🛛 💿
Population Impacts	(status and toc) Status User Profile Ids	= Employee
	Table of Conten	Add Nested Grouping
Racial and/or Ethnic	G 🗐 🗹 : Organization Info ;	5
PERC - Geographic Impact	Copy Element	
County Served	Primary Contact	,
	Primary Signat	
Underserved Populations	Project Staff 1	
	Project Staff 2 Project Staff 3	
Gender		
Age Groups	(loi and full)	
	Project Title	
	Project Summ	
Full Application (Stage 2 of 2)	Amount Requ	
	Duration (in	
Geographic Impact	Anticipated St	
Use of Human Subjects	Grant Closed Grant Ends At	
	Primary Tonic	
Perc use of animal subjects	De El Z	
Use of Rielected Meteolog	if Other, ple	
Use of Biological Material	Earliest Timef	
Use of Radioactive Material	E I Z · Keywords (Le • O Delete	6 💾 Save

- 1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Model Field. In this case, we are looking at a Model Field which has been set up to link to the User record type.
- 2. Box # 2: Shows the User Field which will be displayed by this Model Field. Since this field is set up to link to the User record type, you can select any field in the User field list to be used in display.
 - a. The recommended option is to use **Full Name** for **User** fields. This will ensure that, when looking at a user to select, their First + Last Name will be displayed.
 - b. Another possible option (though not as highly recommended) could be **Email**. If **Email** is selected rather than Full Name, the dropdown menu will display users' email addresses rather than their names for selection.
- Box # 3: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Model Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).
- 4. Box # 4: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 5. Box # 5: Shows the Filter that can be used to limit which User records are available for selection in this Model Field. Since there are many user records in our system (2,771 at time of writing), it is incredibly useful to be able to set a Filter such that not ALL user records will display in the dropdown menu for selection.
 - a. A recommended filter to use is the one displayed in this screenshot: User Profile Ids. This allows you to limit the users available for selection based off of what Profile (or Portal) they have access to. In this scenario, the filter is set up such that only users that can have an Employee profile (i.e. WPP Employees) can be seen for selection.
 - b. The same Criterion can be used to limit the selection to just Grantees or Reviewers (the value would just have to change from "= Employee" to "= Grantee" or "= Reviewer").
- 6. Box # 6: Shows where you can Delete this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Select Field

A Select Field, also called a "Dropdown field" in other databases due to the default dropdown menu that appears, is a field with a limited, fixed number of possible values with NO option for a 'write-in' value. While these fields are **Single-Select, Dropdown fields** by default, each Select Field can be modified to be a **multiple-select** and can then be configured to be viewed in a number of ways.

As a dropdown menu, Select Fields are single-select (i.e. only one option can be chosen at a time). However, the fields can also be as a "Multiple-Select "field (i.e. more than one value can be selected at a given time) which allows for configuration options such as "Select-Transfer" or as a "Checkboxes" field.

These fields can also be configured to be **Hierarchical Dropdowns** (i.e. with several 'levels' of options; we can also change the settings so that only options at the **lowest level** are able to be selected). With these hierarchical dropdowns, we can also enable **percentages** for the options selected, such that if I select two options I could say one is 75% my focus and the other 25% of my focus.

Fluxx has an article that deals with special conditions surrounding Select Fields. The article can be found here: https://fluxxdev.atlassian.net/servicedesk /customer/portal/1/article/1796146647?src=-1251893069

An example of what a Select Field looks like in the system when configured as a Single-Select Dropdown field:

41 - 50 🗸 📓
1 - 10
11 - 20
21 - 30 31 - 40
41 - 50
51 - 60
61+ This project does not intentionally work with any of these groups

An example of what a Select Field looks like when configured as a Multiple-Select "Select-Transfer" field:

Research/Education Classification

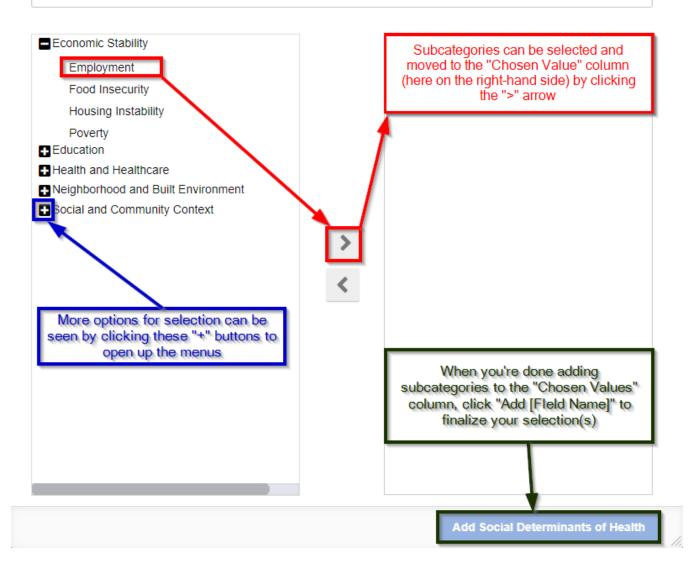
Type 1 Translational Research		Basic Science Research Applied Public Health Research
Clinical Research Type 2 Translational Research		
Education	<	

An example of what a Select Field looks like when configured as an Hierarchical Field before going to select any options:

Social Determinants of Health		
	Use to see options	

Example of what a Select Field looks like when configured as an Hierarchical Field when going to select options:

Search



Example of what a Select Field looks like when configured as an Hierarchical Field when two options have already been selected:

Social Determinants of Health

Economic Stability / Food Insecurity

Social and Community Context / Civic Participation

Select Field Configuration Options – Single-Select Field

When set-up as Single-Select, Select Fields have a shorter list of configuration options. See the screenshot below and the descriptions of the boxed items beneath it for explanations as to what configuration options are available.

A (+)

Res V All states V All kinds V Draft Active		D Preview	Kind
roject Jummary		A 4	Field
		(list view)	Field
Amount Requested		Text: {{ model	PERC - Primary Topic (perc_primary_topic) - DYNAJ
		(header)	PERC - Primary Topic (perc_primary_topic) - DTNA
Duration (in months)		Text: {{ model	Label
		Group	Primary Topic
nticipated Start Date		Text: Request	
		Text: Request	Required
rant Closed At		Text: Request	Required at State
		Text: Grant St	
rant Ends At		Text: Grant St	LOI Draft Eligibility Review
			First External Revie
imary Topic	🗟 🖪 🖸 🕴 1	(grantee)	Full Application Full Application Rev
		Text: Please n	Second External Re - <
rimary topic other show)		(status and toc)	
		Status	Show as Radio Buttons
If Other, please explain:		Table of Conten	Note: Radio button options must have one op
		Table of Content	selected, and therefore cannot be cleared du filtering.
arliest Timeframe for Impact	6 B Z 🚦	Organization Info	
		Organization	 Advanced
eywords (Legacy)	6 B Z 🕴	Organization	Copy Element
(more (Legae))		Primary Contact	
esearch/Education Classification	6 B Z 🚦	Primary Signat	
search/ Education classification		Project Staff 1	
cial Determinants of Health	6 B C :	Project Staff 2	
Car Determinants of Health		Project Staff 3	
nount		(loi and full)	
nounc			
I-Hoc Question		LOI (Stage 1 of	
-noc question		Project Title	
ate Time Test Field	G 🖪 🗹 🚦	Project Summ	
ate fille lest field		Amount Requ	
odel User Field		Duration (in	
		Anticipated St	
nulation Impacts		Grant Closed	
pulation Impacts		Grant Ends At	
Participant (an Palanta		Primary Topic	
Racial and/or Ethnic		(primary topic	
		If Other, ple	
PERC - Geographic Impact			
		Earliest Timef	Delete 5 Save
County Served		Keywords (Le	Belete S Save

 Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Select Field.
 Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Select Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).

3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.

4. Box # 4: Shows the "Show as Radio Buttons" checkbox. When checked, this select field will display with a checkbox next to each possible value that can be selected, rather than with a dropdown menu with the options.

a. Example of what a select field with Radio Buttons turned on looks like:

Primary Topic

Aging and Falls

- Alzheimer's
- O Antibiotic Resistance
- Arthritis
- Asthma
- Cancer
- Cardiovascular
- Cells and Immune Response
- Clinical and Translational Research Support
- Congenital Disorders
- O Data and Surveillance
- O Diabetes and Obesity
- O Education/Workforce Development
- O Faculty Development
- Genetics
- O Health Policy
- O Healthcare Delivery
- O Imaging and Scans
- O Infectious Disease
- O Insomnia
- O Mental Health
- Opioids
- O Pregnancy, Infant Mortality, and Child Health
- O Stem Cells
- Tobacco
- O Vitamin D
- Other

b.

- c. The help text here is also important. It states: "Note: Radio button options must have one option selected, and therefore cannot be cleared during filtering." Essentially, once this is selected as a radio button, a user will be unable to clear any selection that they have made (they'll only be able to change their selection to another option). Additionally, when filtering, employees will not be able to select the "Blank" or "Null" option for a field configured to use Radio Buttons.
- 5. Box # 5: Shows where you can **Delete** this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Select Field Configuration Options – Multiple Response Field

When a Select Field is configured as a Multiple Response Field, the list of Configurations Options is slightly longer. See the screenshot below for a look at the configuration options available and beneath the screenshot for explanations of what each of the configuration options controls.

offies V All states V All kinds V Draft Active REQ BEN CWC		Preview	Kind
Au-not Question	E B C :	A	Field
		(list view)	Field
Date Time Test Field	la 🖪 🗹 🗄	Text: {{ model	County Served (county_impact) - DYNAMIC
Madel (1999 Mald		(header)	
Model User Field		Text: {{ model	Label
Population Impacts		Group	County Served
opulation impacts		Text: Request	
Racial and/or Ethnic		Text: Request	Required
		Text: Request	Required at State
PERC - Geographic Impact		Text: Grant St	LOI Draft
		Text: Grant St	Eligibility Review >
County Served		(grantee)	First External Revie Full Application
		Text: Please n	Full Application Rev Second External Re + <
Underserved Populations		واستخطار	
		(status and toc)	
Gender		Status	Enable Percentage Sliders
		Table of Conten	Select Type
Age Groups		Organization Info	Select-Transfer
		Organization	
		Organization	 Advanced
ull Application (Stage 2 of 2)		Primary Contact	Copy Element
		Primary Signat	
Geographic Impact		Project Staff 1	
		Project Staff 2	
Use of Human Subjects		Project Staff 3	
		(loi and full)	
Perc use of animal subjects	6 B C :	LOI (Stage 1 of	
		Project Title	
Use of Biological Material		Project Summ	
		Amount Regu	
Use of Radioactive Material		Duration (in	
21 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		Anticipated St.,	
(show human subjects)		Grant Closed	
Hea of Human Cubiesta Bratecol #	B B Z	Grant Ends At	
Use of Human Subjects Protocol #		Primary Topic	
		(primary topic	
(show animal subjects)		If Other, ple	
Use of Animal Subjects Protocol #		Earliest Timef	🗢 Delete 🌀 💾 Save

1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, a Select Field.

- Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of a Select Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).
- 3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 4. Box # 4: Shows the "Enable Percentage Sliders" checkbox. When selected, users will be prompted to assign percentages to each of the various values entered into this field so that the user can specify whether, for example, their 3 counties impacted were "evenly" impacted (i.e. 33% each of the various values entered into this field so that the user can specify whether, for example, their 3 counties impacted were "evenly" impacted (i.e. 33% each of the various values entered into this field so that the user can specify whether, for example, their 3 counties impacted were "evenly" impacted (i.e. 33% each of the various values entered into this field so that the user can specify whether, for example, the set of the various values entered into this field so that the user can specify whether, for example, their 3 counties impacted were "evenly" impacted (i.e. 33% each of the various values entered into this field so that the user can specify whether, for example, their 3 counties impacted were "evenly" impacted (i.e. 33% each of the various values entered into this field so that the user can specify whether, for example, the set of the various values entered into this field so that the user can specify whether, for example, the set of the various values entered into the value entered into the values entered into the value entered into the val
 - of them) or if one county was more impacted than the other two (by putting that one county at 50% and the other two at 25% each, say). a. An example of what a Multiple-Response Select Field looks like when configured with Percentage Sliders (Evenly distributed among 3 values):

	County Served:	34% - Barron
		33% - Buffalo
		33% - Brown
•	Same example, but with one county set to 50%	6 and the other two counties evenly distributed:

County Served:	50% - Barron
	25% - Buffalo
	25% - Brown

- 5. Box # 5: Shows the "Select Type" dropdown configuration option. This where you can configure how this multiple-select field can be interacted with by users. The three options available are: Select-Transfer, Checkboxes, and Hierarchical Dropdowns.
 - a. The default option, **Select-Transfer**, allows users to "move" values from the unselected, left-hand side box to the box containing "selected" values on the right-hand side using arrows (">" and "<") to move values between the two boxes.
 - i. Example of what a Multiple-Response Select Field looks like when configured as a Select-Transfer. New values can be selected from the left-hand side, and added to the "Selected" values list on the right hand side by click the ">" arrow in between the two boxes (see also the screenshot below).

	County	Served
--	--------	--------

b.

c.

d.

Adams	>	Barron Brown
Ashland		Buffalo
Bayfield		
Burnett	<	
Calumet		
i.		

- b. The second option, Checkboxes, is similar to the option "Show as Radio Buttons" for Single-Response Select fields. Selecting Checkb oxes will display all the value options in a single list with checkboxes that can be checked next to each value. Clicking the checkbox next to a value will make that value "Selected" and unchecking or leaving blank the checkbox next to value will ensure that it is Not Selected.
 - i. Example of what a Multiple-Response Select Field configured with checkboxes will look like with the first three values Selected and the fourth value left Unselected:

County Served			
Barron			
Brown			
Buffalo			
Adams			

ii.

iii.

b

- c. The third option, Hierarchical Dropdowns, should be used for Multiple-Response Select Fields whose values have different Levels (i.e. there is a hierarchy of values). An example of this in our system is the "Primary Social Determinant of Health" field. This field contains 5 "top level" values, below each of which 4 subcategories live. An example: One top value is "Economic Stability" and the subcategories found underneath it are: "Employment," "Food Insecurity," "Housing Instability," and "Poverty." i. See the main Select Field section for an example of what a Multiple-Response Select Field configured as a Hierarchical

 - Dropdown looks like.
 - ii. Several new configuration options will appear when Hierarchical Dropdowns is selected. See the screenshot below for the options and beneath the screenshot for explanations of what those options control:

Hierarchical Dropdowns	~
 Enable Percentages Enable Searchable UI Only Allow Selection of Deepest C 	ptions
Add Button Label	
Selections	

- cting this checkbox will allow for users to enter in a percenta ge for each of the values selected. This allows the user to inform the WPP that perhaps one value is more critical than the others selected for this specific project.
 - a. Example of how a user may edit the percentages of a selection:

	Social Determinants of Health	Edit Percentages	Ð	
	Economic Stability / Employment	_	Edit P	ercentages
	Economic Stability / Food Insecurity			
. '	When the "Edit Percentages" button is clicked, the screen bel	ow will appear allowing us	ers to ei	ther

C. manually edit the percentages next to each selected value, or to simply click "Evenly Distributed %" in order to have the system automatically split 100% evenly among the number of values selected.

Edit	t Percentages	×
Eco	nomic Stability / Employment	
	nomic Stability / Food	
Eve	nly Distributed %	
	Total - 0%	
d.	Update Percentages	
totals).	ble Percentages is checked, one other configuration option will appear: Disable validation	on (100%
ii. I iii. W ei ca S pe	 In this checkbox looks from the configuration screen: Enable Percentages Disable validation (100% totals) And the percentage values that, aggregated, sum to more than 100. This ensures than't state that two values together accounted for 200% of their work, for example. If the che ELECTED, no validation will be run and this error message will not appear even if the tota ercentage is greater than 100. Intermessage when this option is NOT selected and total % adds up to more than 100: 	at a user eckbox IS
	Edit Percentages	
	Economic Stability / Employment 51 Economic Stability / Food	
	Insecurity 50	
	Evenly Distributed %	
	Alert	
	Percentages must add up to 100.	
v.	OK UI: When the Enable Searchable UI checkbox is checked, the user will NOT be prompte	d with

- 2. E ANY of the values available for selection from this multi-select field. Instead, the user will have to search for a term before any possible values appear.
 a. Example of what a hierarchical multi-select field selection window looks like with Enable Searchable UI turned on:

Search		
User must search a term before results will display	No Results	
	Type to Search	
		Add Add

- hierarchy are more for "grouping" values for selection than they are values themselves.
 4. Add Button Label: This text box allows the user to configure the textual value found when adding new values to this multi-select, hierarchical field. Anything entered into this box will be concatenated to the end of the word "Add" to form the blue button's description when going to enter in values. Since "Add" is already appended to the front, you'll want to avoid using "Add" again in this text box, lest you see a button that looks like the one from the screenshot for Enable Searchable UI (i.e. "Add Add Value").
- a. WPP generally just has the word "Value" here so that the add button comes out looking like "Add Value."
 6. Box # 6: Shows where you can Delete this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.

Amount Field

Amount Fields, also occasionally called "Decimal" fields, are very similar to Number Fields with the additional abilities to use decimal values (not just whole number integers) and to configure the field to have a leading dollar sign (\$) or a trailing percent sign (%). Note: While it's possible to add a leading dollar sign or trailing percentage sign, it is not required to do so.

An example of what an Amount Field looks like in the system when configured to have a leading dollar sign:

Testing Field Amt

\$1.00		
--------	--	--

Amount Field Configuration Options – First Creating the Field/Editing an Existing Amount Field

When you first create a new **Amount** field (or when you go to Edit an Existing Amount Field), you are presented with the option **Decimal Format Type** (see the item boxed in **blue** in the screenshot below).

	×
Attributes Values Visibility	Styling
Kind	
Field	~
Field	
Create New Field	~
Description*	
Test: Amount Type Field	
Type*	
Amount	~
Decimal Format Type*	
	~
Api Style	
Api Style Full	~
	~
Full	~
Full	~
Full ► Advanced	~
Full ► Advanced	~



The three options available in the Decimal Format Type dropdown menu are:

- 1. Decimal: Essentially the "default" option, Decimal format means that the field will accept decimal answers (distinguishing this field type from a N umber or Integer field). No other formatting is applied to the field.
- a. Example value: 3.012 (notice that the decimal spot is maintained and can go out to as many decimal places as needed).
- 2. Percent: Formats the value such that there is a trailing percentage sign ("%") appended to the end of every value. Values will be rounded up to the nearest Integer percentage (e.g. entering in 50.679% will have the system round the value up to 51%).
 - a. Example value: 51% (notice the trailing % sign at the end of the value).
- 3. Currency: Formats the value such that there is a leading dollar sign ("\$") appended to the front of every value. Values can store a maximum of 2 decimal places (since currency values rarely exceed 2 decimal places).
 - a. Example value: \$50.67 (notice the leading dollar sign; additionally, a value like 50.679 cannot be entered it would have to be rounded up to 50.68).

Amount Field Configuration Options - Configuration Options of Existing Fields on a Form

Regardless of which **Decimal Format Type** your **Amount Field** is configured with, the options for configuration when adding the Amount field to a form are mostly the same. Please see the screenshot below for highlighted, important items from this screen and beneath the screen for descriptions of said items.

📣 FLUXX		E.Form Builder			Attributes Values Visibility Styling
Forms	Bank Account	All profiles V All states V All kinds V Draft Active Rc CWC		Preview	Kind Field Y
Workflow	E Claim	(primary topic other show)		(list view)	Field
Card Settings	🙆 Coi	If Other, please explain:	6 B Z	(header)	Test: Amount Type Field (test_amount_type_field) - D) V
Card Documents User Settings	🖿 Etl Request Budget	Earliest Timeframe for Impact	ē B 🖸 🗄	Group Text: Request	Test: Amount Type Field
Programs	Eti Request Transa	Keywords (Legacy)		Text: Request Text: Request	Required 3 Max value 4
Queue	Fund	Research/Education Classification		Text: Grant St Text: Grant St	Min value
Cache	Fund Docket	Social Determinants of Health Test: Amount Type Field		(grantee) Text: Please n	Currency expander 5
Migrations Data Management	Funding Source	Ad-Hoc Question		(status and toc) Status Table of Conten	Numeric range Advanced
Plug Ins	Funding Source Al	Date Time Test Field		Organization Info	Copy Element
Finance	C Generic Template	Model User Field		Organization	~
Global Settings	📄 Grant Data Archive 🎄	Population Impacts		Primary Contact Primary Signat	
	Grant Request	Racial and/or Ethnic		Project Staff 1 Project Staff 2	
	est Theme	PERC - Geographic Impact County Served		Project Staff 3 (loi and full)	
	E Default 🗘	Underserved Populations		LOI (Stage 1 of Project Title Project Summ	
	Historical	Gender		Amount Requ Duration (in	
	OAC Grant	Age Groups	G 🖪 🗹 🗄	Anticipated St Grant Closed	
	+ New Theme	Full Application (Stage 2 of 2)	6 B Z :	Grant Ends At Primary Topic	
	Grantee Budget	Organizational Contact Information	ē B. 🗹 🗄	(primary topic If Other, ple Earliest Timef	🗢 Delete 6 🕒 Save 7

- 1. Box # 1: Shows the field currently selected; in this case, the field selected is, of course, an Amount field.
- Box # 2: Shows the configurable label for the field on this specific form. As with all fields (and components), you can change the label of an Amou nt Field on each and every form on which it lives. This is useful if different text is needed for different groups of Grantees (i.e. PERC vs. OAC Grantees).
- 3. Box # 3: Shows the "Required" checkbox. When this checkbox is selected, the field will be considered Required for the form. This means that the Grantee will be unable to submit the form without filling out this field. Additionally, the field label will be Bolded on the form.
- 4. Box # 4: Shows the Max value and Min value configuration options for the number field. If the Max value and Min value are filled out (with numbers), a user will be unable to advance (e.g. Submit) a Form when the value entered in this field exceeds the Max value or is below (less than) the Min value.
- 5. Box # 5: Shows two checkboxes which serve as functionality toggles. Please see the descriptions below to better understand what each checkbox controls.
 - a. Currency expander: This option is only available for Amount Fields with a Decimal Format Type of <u>Currency</u> (the checkbox will be hidden if the Decimal Format Type is NOT Currency). When this checkbox IS checked, users will be able to enter common abbreviated forms for high denominations, e.g. entering "\$5k" will have the system convert that to "\$5,000.00" or entering in "\$5m" will have the system convert that to "\$5,000,000.00"
 - i. Example of what the help text for an amount field with the currency expander functionality turned on:

Test: Amount Type Field	\$5.00	
	Max 15 digits, 2 decimal digits. Allowed Shortcuts: k (000 (00000000000).), m (000000) and b

- b. Numeric range: Selecting this check box will make several new options appear for the field. In short, selecting this checkbox ensures that users cannot manually enter in values, but instead are required to select a value from one of the options presented (turns Number Field into something more akin to a Select field).
 - i. This Numeric Range works the same as the Numeric Range for Number Fields. Please see the Number Field Configuration Options section for more information on how to configure a Numeric Range.
- 6. Box # 6: Shows where you can Delete this field from the form. Note: Deleting a field will also delete any configuration options you have saved for it; if you were to add the same field back to the Form afterwards, it would be added with all configurations moved back to the default.
- 7. Box # 7: Shows the Save button. As with all fields, if you make any changes whatsoever you'll need to hit the Save button for your changes to be effectuated. If you do not, any unsaved changes will be discarded.

Table Field

A Table Field, as the name implies, is table with a configurable number of rows and columns, as well as configurable column titles. The table can be configured to have either a fixed number of rows or to allow the user to manually add rows as needed.

Note on tables: While table fields look good within Fluxx, it is recommended to avoid using tables whenever possible. The reason is the export format of Table Fields. Please see the example below to see how a table field exports.

An example of what a Table Field looks like in the system, with the setting selected to allow users to add more rows if needed:

	Cat Name	Age
1	Annie	27
2	Bert	23
3		
4		
Œ	Click this "+"	button to add a row

When that table is exported, ALL of its data is exported into a single cell in the CSV/Excel file that generates. Here's what that cell looks like from the export:

{"a1":"Annie","b1":"27","a2":"Bert","b2":"23","a3":"","b3":"","a4":"","b4":""}

As you can see, the good-looking table from Fluxx is turned into a bit of a data mess. "Cat Name" row 1 becomes "a1" which is then colon-delimited (":") from its value, "Annie." The same occurs for each subsequent cell and row, with commas (",") separating the cells-their values from each other.

Ad-Hoc Questions Field

Ad-Hoc Questions are similar to Text Areas with the exception that the specific question asked can be added/changed/modified on the fly and made unique to a given grantee, even if the "field" itself is not unique.

Basically, an Ad-Hoc Question field is a placeholder for a guestion that staff members can write/change on each record for which the Ad-Hoc Question is applied. See the examples, below.

An example of what an Ad-Hoc Question looks like within the system before a question has been configured on this record:

Ad-Hoc Question	Add A New Question	0	
No questions have been created.	Use "+" to configure the question	4	4,

When you click the green "+" button to configure the question, a window will pop up with a small text box. Type in your question there, then click "Save" to finalize and publish the question out to the record in question.

Add A Ne	w Question	,
	Type in question here	
Then cl	ick "Save" to finalize and publish the	
Then cl	ick "Save" to finalize and publish the question	. .

That will finalize the question for this record (again, remember that the question will NOT get configured for any other records that have a the same "Ad-Hoc Question" field on them). The Grantee will then see this question and be able to respond as if it were a Text Area field with Rich Text Editing.

View of the published question from an employee's perspective:

Ad-Hoc Question

What is your favorite flavor of ice cream?:

View of this question from the Grantee's portal. As you can see, the question now acts as a Text Area with Rich Text Editing enabled:

Ad-Hoc Question

What is your favorite flavor of ice cream?:

T:	в	i	<u>u</u>	÷	S¹	S,	:=	=	5	Č

Field Modification

Before you go on...

Fluxx has a great article that touches on many of the pieces discussed below. Article can be found here: https://fluxxdev.atlassian.net/servicedesk/customer /portal/1/article/1451884575?src=83393115

Editing Existing Fields

From the Admin Panel Card Settings (Relevant Record Type with the Field you'd like to edit e.g. "Grant Request") "Fields" tab, you can see the list of fields for a given Record Type and even edit/change these existing fields (though you should be <u>highly cautious</u> when doing so – see below for warnings).

🍝 FLUXX		Configurations Export Format Field List Fields Methods	× Attributes
Forms	Bank Account	All dynamic fields:	A
Workflow	🗁 Claim	active_pending_spreadsheet_url active_pending_spreadsheet_url]ted	Description* 2 Activities
Card Settings	O Col	Activities advices Text	Type* 3 Text Area
Gard Documents	_		Text Area 🗸
User Settings	Etl Request Budget	addillonal_collaborators additoral_ontacorators Text	Api Style full 🗸
Programs	Eti Request Transa	additional_information additional_information	✓ Include in Export? 4 □ Display as dropdown value?
Queue	🖻 Fund	additional_information_detail	Full Text Search?
Cache	Fund Docket		► Advanced
Migrations	Funding Source	Age Group age_group Multivalue	
Data Management	Funding Source Al	Anticipated Start anticipated_start_Date	
Plug Ins	-	Application Co-PIs	
Finance	Grant Data Archive 🎄	application_cops Text	
Global Settings	Grant Request	application_resubmission_form_detail application_resubmission_form_detail_Text	
	Grantee Budget	application_resubmission_form_fag_ sprinterior_resubmission_form_fag_18ootan	
	Indicator	al_a_giance_text	
	C Initiative		
	Integration Log	aftestation, flag xexación_traj Bolxan	
	🔟 Loi	attestation_signature attestation_signature	
	Matching Gift Profile	background_research_and_evidence badground_research_and_evidence Text	
	Meetings and Site ¢	brief abstract_and_impact_statement hole* debut kol mover openentText	•
	+	New Field	🗢 Delete 💾 Save

- 1. Box # 1: Shows the Field that you currently have selected. You can tell which Field is currently selected NOT ONLY based off of the name (match name of Field with "Description" from box # 2), BUT ALSO from the slim green line that appears to the LEFT of the Field name.
- 2. Box # 2: Shows the Field Description, which acts as the External Field Name as well as the default label for the field whenever it is added to any Themes (forms) of the Record Type selected (in the image above, Grant Requests). This Description field can be updated without breaking anything in the system (the same is NOT true for other items on this screen),
- 3. Box # 3: Shows the Field Type for the Field selected. You can change the Field Type after a field has been created. However, <u>THIS IS</u> INCREDIBLY DANGEROUS AND SHOULD BE DONE ONLY AFTER YOU HAVE TESTED DOING SO IN PRE-RPODUCTION AND. CONFIRMED THERE ARE NO NEGATIVE REPURCUSSIONS. In general, updating a Field Type should only be done if the field itself <u>has</u> no data and was created incorrectly. In most cases, it is best to simply create a brand new field. Do NOT change Field Types on fields with migrated or existing data (unless you are OK with losing access to that data). The data stored is specific to the field type. If you change the type on an existing field with data, for example, a date value will not convert to text or text value to a numerical value. Changing the field type will change the way the data is stored in the database. After a field type change on a field that had existing data, that data will no longer be visible on the front end. The data will have to be re-entered/imported into the new field type in the correct format. If you ARE changing a field type, remember to:

a. Check existing visibility conditions built with this field.

- i. E.g. When you change the select field to a Boolean field, but you are referencing the select value in your show condition, it will cause the section of the form to not open
- **b.** Update the form by deleting the field originally on the form, and adding the field with the new field type (otherwise, the item will NOT be updated correctly on your **Theme**).
- 4. Box # 4: Displays other options you can change/configure for this field. Descriptions of what the various options mean/do:
 - a. Include in Export: Includes the field in the Excel Export function.
 - b. Display as dropdown value?: Only for select, Boolean, and model fields. Will display the entries of the field as a dropdown when being used as a linking field for an embedded card.
 - c. Full-Text Search?: Includes the field's data as part of what is searched in a card search (i.e. when typing in a search term in the "Search" bar of a card with the same Field Type as this field).