

VISIBILITY DEPENDENT FIELDS

Agiloft Release 8.0 (2015_01) enhanced support for fields with visibility dependence. Rather than basing a field’s visibility on a single choice or multi-choice field, it is now possible to choose several conditions that lead to a field becoming visible. Each condition is based on a (native or linked) *choice* or *multi-choice* field having certain values. You can choose whether to show the field if **all conditions are met** or if **any of the conditions is true**.

Terminology

Dependent field	A field whose <i>visibility</i> is controlled by the <i>values</i> held in one or more other fields (parent fields) in the table.
Parent field	A field whose <i>values</i> control the <i>visibility</i> of a dependent field. Parent fields are <i>choice fields</i> , <i>multi-choice fields</i> , or <i>linked multi/choice fields</i> from other tables.
Condition	Conditions are the set of allowed values in the parent field that cause the dependent field to appear. The condition editor is a pop-up window where you select fields and values.

Use Case

Let’s consider a simple example in contract management.

Suppose the Contract table contains a date field, **Contract End Date**, which should be visible if the **Renewal Type** field has the value Auto-Renewing, Notify Staff to Renew, or One time contract. **Contract End Date** should also be visible if the **Status** is Cancelled, regardless of the **Renewal Type**.

Previously, there was no way to do this without creating a third choice field (e.g., **Show End Date?**) that was set by a rule based on the values of the first two fields, **Renewal Type** and **Status**.

Now, we can make **dependent fields** visible if **all** or **any** of several conditions is met:

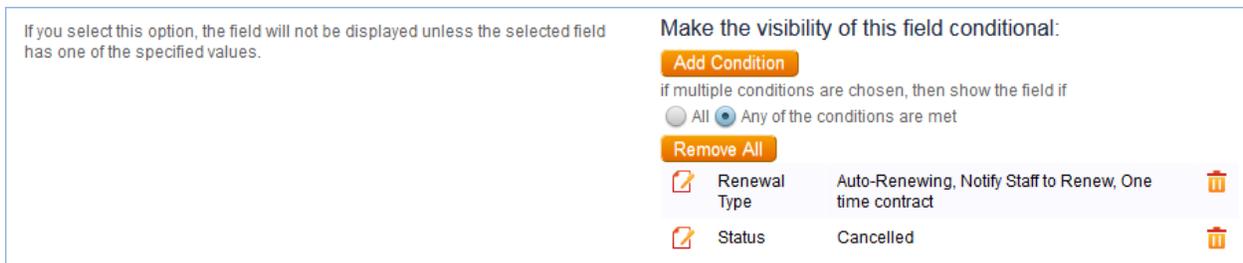


Figure 1. Contract End Date will appear if either condition is met, set on the field wizard Options tab.

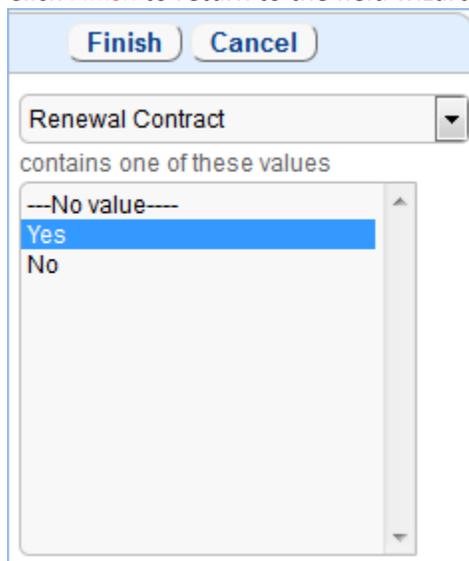
This screenshot is shows the **Options** tab of the field wizard.

Note: As with other field settings, **System Admins** or **Table Admins** can set visibility dependencies, provided their group has admin access to the tables containing the affected fields.

Setting Visibility Dependence Conditions

To begin, **Edit** the field whose visibility is controlled by other fields (**Setup [Table] > Fields > [Select field]**).

1. In the Field wizard, navigate to the **Options** tab. Scroll down to find the option **Make the visibility of this field conditional**.
2. Click **Add Condition** to open the **condition editor**.



- a. From the drop-down, select the field that controls this field's visibility.
 - b. Select the values that will allow this field to be visible. (Hold down Ctrl to select multiple values for a condition.)
 - c. Click **Finish** to return to the field wizard.
 - d. **To add another condition**, repeat step 2. There is no limit on the number of conditions you can add, other than the number of available parent fields.
3. To modify an existing condition, click the edit  icon.
4. To delete an existing condition, click the trash bin  icon.
 - a. To remove all existing conditions for visibility dependence, click the **Remove All** button.

- If multiple conditions are set, choose whether the field should be shown if **All** conditions are met, or if **any of the conditions** are met.

Make the visibility of this field conditional:

Add Condition

if multiple conditions are chosen, then show the field if

All Any of the conditions are met

Remove All

	Renewal Contract	Yes	
	Renewal Status	Renewal Quote Accepted, Invoiced, Paid	

- Click **Finish** to apply your changes and return to the Table wizard.

Required Field Permissions

Note: It is not necessary for a **parent field** to appear on the layout in order for a **dependent field** to recognize its value.

- In order to see a **visibility dependent field**, users must have **view** permission for the dependent field itself. In addition:
- When a single visibility condition is set:** Users must have **view** permission for the field that controls visibility, the **parent field**.
- When “all” of multiple conditions must be met:** Users must have **view** permission for all of the **parent fields**.
- When “any” of multiple conditions must be met:** Users must have **view** permission for **at least one** of the **parent fields** which is “true,” i.e., which is currently meeting the condition and allowing the dependent field to appear.

Notes: If any of the **parent fields** is itself hierarchically dependent, users must have permission to view the parents of those parent fields, i.e. the “grand-parent” fields.

It is not necessary for a **parent field** to appear on the layout in order for a **dependent field** to recognize its value.

Multiple Visibility Condition Permission Examples

The graphic examples below show how different combinations of **view permissions** and **true conditions** affect users’ ability to see a **dependent field**.

All conditions

All conditions must be met	User has view permission?	Is condition met?
Parent A	✓	✓
Parent B	✓	✓
Parent C	✓	✓
Is dependent field visible?	YES	

Example 1

All conditions must be met	User has view permission?	Is condition met?
Parent A	✓	✓
Parent B	✓	
Parent C	✓	✓
Is dependent field visible?	NO	

Example 2

All conditions must be met	User has view permission?	Is condition met?
Parent A	✓	✓
Parent B		✓
Parent C	✓	✓
Is dependent field visible?	NO	

Example 3

Any condition

Any condition must be met	User has view permission?	Is condition met?
Parent A	✓	
Parent B		✓
Parent C	✓	
Is dependent field visible?	NO	

Example 4

Any condition must be met	User has view permission?	Is condition met?
Parent A	✓	✓
Parent B		✓
Parent C	✓	
Is dependent field visible?	YES	

Example 5

Any condition must be met	User has view permission?	Is condition met?
Parent A	✓	
Parent B	✓	✓
Parent C	✓	
Is dependent field visible?	YES	

Example 6