

Understanding Fields: Form, Formatting, and Utility Field Explanations

Fields are the individual data elements that makeup forms. You can think of them as a container for a type of information. They are the building blocks the Forms Module uses to collect, store, and process data in a structured way.

Every field has properties (or metadata) that define it: a Name/Identifier (what the field is called internally), the Data Type (what kind of data it can hold), Constraints (the rules that limit what data is valid), Default Value (what to use if no data is entered), and Validation Rules (checks to ensure the input meets expectations, e.g., email format, numeric range).

In KAStrack, individuals with Admin permissions can define custom fields that appear as form inputs that can be utilized in structured formats. There are three field types utilized in the Forms Module: form fields, formatting fields, and utility fields. Users can also reference data from a database in a field.

A form typically contains multiple fields to match the data collection requirements. Using fields effectively, allows the form to be highly customized.

One of the advantages of using KAStrack Forms to collect and store data is the integration of the Reports module, allowing custom reports that can be used to analyze and trend the information collected.

Form Fields

A form field is an individual input element within a digital form that allows a user to enter, select, or submit data. Each form field captures a specific piece of information after the form (or modal) is submitted.

The table below shows the type of form fields (that indicate the type of data/information to be input) utilized in the Forms Module and the customizable choices associated with them.

Form Field Type Choice Explanations			
Form Field Type	Customizable Choices	Comments	
Text	Start Hidden	If selected, the field will be hidden when the modal first loads.	
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.	
	Force Capitalization	Selecting “Force Capitalization” will convert inputted text to all capital letters.	
	Treat As Link	☒ Treat as Link ☐ Open in a new window	When selected, the input becomes a clickable link. A checkbox selection forces the link to open in a new tab.
Text Box	Start Hidden	If selected, the field will be hidden when the modal first loads.	
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.	
	Force Capitalization	Selecting “Force Capitalization” requires the information input to be capitalized.	
HTML Text Box	Start Hidden	If selected, the field will be hidden when the modal first loads.	
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.	
Checkbox	Start Hidden	If selected, the field will be hidden when the modal first loads.	
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
	Checked By Default	If selected, the checkbox field created will be selected by default.	
Dropdown	Start Hidden	If selected, the field will be hidden when the modal first loads.	
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.	

Add Blank	☒ Add Blank Text for blank option Select the plus sign icon to add additional entries. Textboxes must be saved individually through the disc icon or by the clickable “Save All” link.	
Add "Other" Option	If selected, “Other” will be included as a checkbox that when selected, opens a textbox for data input.	
Multiple	If selected, allows a user to pick more than one item from the dropdown menu.	
Options	Options  You have unsaved options. Save All   Select the plus sign icon to add additional entries. Textboxes must be saved individually through the disc icon or by the clickable “Save All” link.	
Radios	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.
	Options	Options  You have unsaved options. Save All   Select the plus sign icon to add additional entries. Textboxes must be saved individually through the disc icon or by the clickable “Save All” link.
Date	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
	Must Be Unique	
Date / Time	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.
File Upload	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
	Max File Size	If left blank, the maximum upload file size is 500 MB.

Allowed Extensions	Any extension	Allow anything to be uploaded.
	Images	.jpg, .jpeg, .png, .gif, .bmp, .svg
	Documents	.doc, .docx, .odt, .pdf
	MS Word Document	.doc, .docx
	Spreadsheets	.xls, .xlsx, .csv
	MS Excel Spreadsheet	.xls, .xlsx
	MS Powerpoint Presentation	.ppt, .pptx
	Custom	Allows the form creator to specify what can be uploaded
Allow Multiple Files	If selected, multiple files can be uploaded.	
Mandatory	If selected, a file upload will be required.	
Image	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
	Include Image Thumbnails When Viewing the PDF of an Entry	If selected, images will be included in a separate page when viewing the PDF of an entry. The modal will expand, allowing for the customization of the max width and the max height of the thumbnail. A checkbox allows you to space images evenly on the separate page.
	Max File Size	If left blank, the maximum upload file size is 500 MB.
	Allow Multiple Files	If selected, multiple images can be uploaded.
	Mandatory	If selected, an image will be required.
Password	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.
Signature Field	Start Hidden	If selected, the field will be hidden when the modal first loads.
	Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.
	2FA Authorization	2FA stands for two factor authorization. If selected, KAStrack will require a second method of authorization.
Image Map Picker	Start Hidden	If selected, the field will be hidden when the modal first loads.

Show in View / Manage Entries	Selected by default; Deselect if the field is being used for data acquisition and you do not want it to be visible.	
Must Be Unique	If selected, the system will force the entered value for this field to be unique from any previously submitted entries.	
Multiple	If selected, allows a user to pick more than one item from the dropdown menu.	
Image for image map	Choose an image to upload - this is the image that will show on the Form, within which defined regions of the image will become selectable choices.	
Image Map HTML	Code that defines selectable regions on the image. There are a number of free websites that can be used to generate the image map HTML. Some examples are https://www.image-map.net/ and https://www.maschek.hu/imagemap/ .	
Highlight Sections	When Hovering	Handles the selectable image region's appearance when the user's mouse is hovering over that region.
	When Selected	Handles the selectable image region's appearance when the user has clicked and selected a region, or chosen that region from a dropdown.
Selections Display Style	Show selections as text	Lists selected image regions as plain text below or above the image.
	Show and allow selections in a dropdown	Provides a dropdown field where selected image regions will show, but also allows the user to pick regions without having to interact with the image directly.
Selections Display Position	Let's you choose where the selections display text / dropdown shows, either above or below the image map.	

All field types include a checkbox option to "Include on Form" that is selected by default.

The following information can also be used when creating a form field.

Form Field Creation Inputs	
Field	Explanation

Default	Whatever is input as the default will automatically be input into the form entry. The default can be replaced by the individual adding the entry.
Placeholder Text	The Placeholder Text textbox can be used to display greyed out text in a textbox that can be used as a hint in the field. It can be a maximum of 25 characters and will disappear when information is entered.
Context Sensitive Help	Context Sensitive Help will be visible when the blue question mark icon is clicked. Utilize this to include additional information needed to aid in completion of the field.
Field Validation	Field validation is the process of checking that the data entered into a form field meets specific rules or criteria before it is accepted or saved and is used to prevent typos, formatting errors, and missing information from entering the database. The Validation dropdown menu allows a user to select between Optional and Mandatory validation with specific formatting requirements, or a Custom Regular Expression. Selecting Mandatory from the dropdown menu requires that there is content in the field and that it fits a specific format.
Validation Help	Validation help (similar to context sensitive help) allows for a customized message to explain what/how something needs to be entered for field validation.
CSS Classes	CSS is a standardized system used to determine how web pages look. CSS classes are groupings of various styles (e.g. border, font color and size), and can be defined in KAStrack forms with whatever styles you like. When you assign a CSS Class to a form field, the field inherits all the styling associated with that class.

Formatting Fields

A formatting field refers to a field or placeholder in a form, database, or document template. Formatting fields apply style, structure, or output rules to data, controlling how data is displayed, structured, and presented rather than what the data actually is. When a formatting field is used in a database, it is defining the visual output.

Withing KAStrack's Forms Module, there are four formatting fields: Start Section, End Section, Tabs Start, Tabs End.

Formatting Fields Explanations	
Field	Explanation

Section Start	The Section Start formatting field is a control used in a database to signal the beginning of a new logical or visual section. It groups related fields on the same page and adds structure. If the start hidden checkbox is selected, the section formatting will be hidden when the field first loads. Note: If you select the start hidden checkbox, you will not be able to use a display CSS style for a section. If the Make Selection Collapsible checkbox is checked, the modal expands with options for character to show when collapsed, character to show when expanded, additional spacing, if it should start collapsed, and if the section styles should be applied to the section header. Formatting options for the new section include: border, border radius, padding, margin, background color, background image URL, background image position, background image size, background image repeat, font, text color, and rotation. Clicking “Show/hide advanced” opens a CSS Styling textbox. <i>Note: All CSS styles must be valid CSS Styles.</i> All Section Start Fields must have a corresponding Section End Field.
Section End	The Section End Formatting Field marks the end of a formatted section that started with a Section Start formatting field. It communicates to the system “Stop applying the formatting or logic that began at the Section Start.” All Section End Fields must be used with a corresponding Section Start Field.
Tab Start	A tab start formatting field indicates the beginning of a new tab container or page in a multi-section form or document. Tab start creates separate pages or panels within a single form and improves navigation and organization. When you add a tab start field, it creates a new tab header and defines where the content of that tab begins. When another tab start field is used, a new tab is created by the system. All Tab Start Fields must have a corresponding Tab End field. Between the two, you are required to have a section that contains fields.
Tab End	A Tab End formatting field indicates the end of the active tab container that began with a Tab Start formatting field.

All Tab Start Fields must have a corresponding Tab End field. Between the two, you are required to have a section that contains fields.

Utility Fields

A utility field is a system-level field that performs a technical or aesthetic function such as spacing, visibility control, conditional logic, calculations, or layout consistency in the background. Think of it as a helper field that manages how information looks or functions.

Ensures security			
Read Only	Displays data that the user can see but not change	Pulls values from the database or calculated results but locks editing	Mark as non-editable
			Useful for summary or verification data
			Can still be exported
Mail Merge	Acts as a placeholder in document templates that pulls live data into generated files	Replaces tags with actual field values during document generation	Must match database field names
			Verify formatting (dates, currency, capitalization)
			Used in templates for Word, PDF, or HTML
			Ensures privacy when merging client data
Copy Previous Entry	Automatically fills a field with the value entered in the previous record	When creating a new record, the system retrieves the last entered value for that field	Choose which fields allow copying
			Ensure users can overwrite if needed
			Often used for reoccurring data
			Improves speed and data consistency
Attach DB/ Form Entry(s) Field	Allows entries from other databases/forms to be embedded into another form	Only saved entries can be attached.	If a form utilizes "save draft and assign" rule or "save draft and run" rule, you are not able to attach the entry that was started.
			If an attached entry is edited, the changes will be reflected in the attachments.

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