



Troubleshooting Infocapture Notifications

InfoCapture notifications are a really important part of the workflow and configuration of InfoCapture forms, it can be frustrating if they are not appearing to work in the way you were expecting.

In this article, we are going to cover tips and tricks for locating or understanding why notifications are missing and also why unexpected notifications may have arrived.

Locating the cause of a missing notification

1- Verification that the notification did or did not send

If you are running Claromentis **8.8.9+**, we added additional tracking for InfoCapture notifications within the audit log.

Admin > Audit log > View logs

As shown below:

claromentis

Admin / Audit / View logs

☐ From

User name

Category

CSV delimiter ☒ Comma (,) ☐ Semicolon (;)

Date/Time	User name	Impersonated user	IP address Proxy IP
17-07-2020 01:20	Claromentis Administrator		31.22.42.5
17-07-2020 01:20	Claromentis Administrator		31.22.42.5
17-07-2020 01:20	Claromentis Administrator		31.22.42.5
17-07-2020 01:20	Claromentis Administrator		31.22.42.5
17-07-2020 01:20	Claromentis Administrator		31.22.42.5
17-07-2020 01:20	Claromentis Administrator		31.22.42.5

- ✓ All items
- View issue
- Add issue
- Edit issue
- Change issue assign
- Change issue status
- Delete issue
- Attach file to issue
- Add note to issue
- Add new project
- Update project properties
- Add new version of form
- Delete project
- Delete version of form
- Change form value
- Change form permissions
- Modify form status
- Create form status
- Modify field condition set
- Modify field conditions
- Create field condition set
- Delete field condition set
- Add field group
- Delete field group
- Modify field group
- Modify field permissions
- Delete form status
- Reorder form statuses
- Import Issue
- Create trigger
- Modify trigger
- Delete trigger
- Create workflow
- Modify workflow
- Delete workflow
- Re-order SLA
- Edit traffic light
- Create traffic light
- Delete traffic light
- Modify SLA rules
- Modify SLA status actions
- Modify SLA working hours
- Modify rules for automatic changes
- Modify notification template
- Modify notification settings
- Modify ticket list fields
- Send an email notification
- Send an in-system notification

If you can locate a submitted ticket which you would have expected to produce a notification, you will need to cross-reference the time the notification should have triggered with the time range selected in the audit.

If the notification did send but was not received it means:

- Your form is functioning correctly
- The email left the system but did not (for some reason) reach the inbox of the user
 - Was the email address correct / could the email be in spam or junk
 - If we host your site, you can submit a support ticket and we will check the SMTP server to see if the email has bounced or is blocked for any reason
 - If you are self-hosted (on-premise) you may wish to check your SMTP server to trace why this email did not reach the inbox

If you do not have access to the additional audit tracking you may need to check the SMTP setting to see if there were any blocked messages or it could mean there is something wrong with the form.

2 - Is the form correct

If the notification did not appear in the audit tool at all - it means the form is not configured correctly.

In this scenario the customer support team did not get a notification that a new ticket was submitted, it is best to work backwards from the notification itself. When looking at the notification configuration these are the two key questions:

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

Automatic changes

Workflow

Notification

Notifications

Default notification fields

List options

Advanced notifications

Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

For a given trigger, you can specify the roles, individual email addresses, or use tickets on your own. For example, a trigger of 'New Ticket Submitted' could be configured to send an email to a project role called 'Approvers', with a role of 'Approvers'.

+ Add new rule

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓
New issue reported	Email	Issue reported: Development	Development	↑ ↓
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑

1 - Is the trigger correct?

If we check back to the trigger configuration, it all seems correct:

Name / Order #	Rules	Use for dynamic fields changes	Use for notifications	Notification type
New issue reported	New ticket submitted	Yes	Yes	Email
Status changed	Any of these fields changed: (STATUS)	Yes	Yes	Email
Note added	Public or private note has been added	Yes	Yes	Email
File upload	File has been uploaded	Yes	Yes	Email
Assigned changed	Any of these fields changed: (ASSIGNED TO)	Yes	Yes	Email

Admin / Infocapture / Bug Tracker / Triggers / Add/Edit a trigger

Trigger properties

Name

New issue reported

Rules

Name	Value
<input checked="" type="checkbox"/> Ticket activity	<input checked="" type="radio"/> New ticket submitted <input type="radio"/> Public or private note has been added <input type="radio"/> Public note has been added <input type="radio"/> Private note has been added <input type="radio"/> File uploaded
<input type="checkbox"/> Any of the following fields changed	Type (type) Reproducibility (reproducibility) Severity (severity) Priority (priority)

If this trigger is based on a field condition set, this will also need checking. You will then need to ensure every condition that was identified within the field condition set was definitely met when the user submitted the ticket.

2- Does this role have permissions to view tickets?

When a specific role is entered into the notification configuration (rather than a direct email for example) the system will run a check to ensure that role has permissions to view tickets. As notifications often contain ticket details, it would be a permissions loophole if roles placed here could get notifications without the 'view tickets' permission.

Checking the permissions, we can see the 'Customer support' role is missing this permission:

Project roles							
Rights							
Rights	Project role						
	<input type="checkbox"/> Admin	<input type="checkbox"/> Development	<input type="checkbox"/> Testing	<input type="checkbox"/> Users	<input type="checkbox"/> Customer support	<input type="checkbox"/> Submitter of ticket	<input type="checkbox"/> Ticket handler
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submit tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Handle tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Update tickets status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assign tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Add notes to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attach files to a ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manage tickets (delete, files, notes)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View reports page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View statistics page	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Locating the cause of an unexpected notification

If you have a notification arrive which you do not see configured in the notification panel, this could indicate one of the following scenarios.

1- If the recipient of the notification was either the ticket submitter or ticket handler - are either of these boxes ticked:

Admin / Infocapture / Bug Tracker / Notifications

Project options

Project Summary
Edit project properties
Project permissions
Statuses
Conditions
Field condition sets
Triggers
Behaviour
Field visibility
SLA
Automatic changes
Workflow
Notification

Notifications
Configure email notification to inform users about changes in the tickets.
☐ Notify submitter about any changes in the tickets
☐ Notify ticket handler about any changes in the tickets
Save

Advanced notifications
Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

For a chosen Trigger, an email notification can be sent to project roles, individual email addresses, or user pickers on your form. For example, a trigger of 'New Ticket Submitted' could generate an email to a project role called 'Approvers', with a notification template asking the role's users to approve the ticket.

Add new rule

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓ 🗑
New issue reported	Email	Issue reported: Development	Development	↑ ↓ 🗑
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓ 🗑

Having either of these ticked will result in the handler or submitter receiving a default notification. If you wish to customise the default notification, here is some guidance.

2 - A second place to look (if the above are not checked) is in the front end of the InfoCapture in the ticket list view. You will need to ask the user who is getting these notifications to check whether any of these settings are checked:

InfoCapture / Demo Form

Ticket #

Jump

Switch to

Demo Form

+ Submit ticket

This project is in "testing" state. Notifications will not be sent.

Enter your search words...

Search

Statistics

All11

Submitted by me11

Assigned to me0

Options

+ Submit ticket

List of tickets

Statistics

1-11/11

ID

demo0011	1	2	
demo0010	2	2	
demo0009			

InfoCapture / Demo Form / Notifications settings

Ticket #

Jump

Switch to

Demo Form

+ Submit ticket

Please notify me about any changes in tickets which are...

Submitted by me

☒ Default

☐ Yes

☐ No

Assigned to me

☒ Default

☐ Yes

☐ No

☐ Any new tickets

Save

3- Finally, you will need to ensure that the users are definitely not included in any of the roles that are due to get notifications, a way of checking this is by reviewing the template of the notification. If you know the subject line of the email is 'A new Bug issue reported....' you can check who is in line to receive this notification, in the example below:

+ Add new rule

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Reporter	Customer support, Submitter of ticket	↓
New issue reported	Email	Issue reported: Development	Development	↑ ↓
Assigned changed	Email	Issue assigned: Handler	Ticket handler	↑ ↓
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑ ↓
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler	↑

Notifications templates

+ Add new template

Name	Subject line	Type	
Issue reported: Reporter	Bug {issue:_id_in_project_} has been reported: {issue:summary}	HTML	
Issue updated: Reporter & Handler	Bug {issue:_id_in_project_} has been updated: {issue:summary}	HTML	
Issue reported: Development	A new Bug {issue:_id_in_project_} has been reported : {issue:summary}	HTML	
Issue assigned: Handler	Bug {issue:_id_in_project_} has been assigned to you: {issue:summary}	HTML	

You would then need to

double-check the user that received this notification is not in the 'Development' role.