

InfoCapture best practices: Form functionality changes

We appreciate there is a lot to get to grips with in InfoCapture and its particular mechanisms will become familiar with experience.

Below are some best practice tips for administrators managing changes over time.

- Changing these elements in an established form *will* negatively affect past ticket data, they should be kept static once in use:

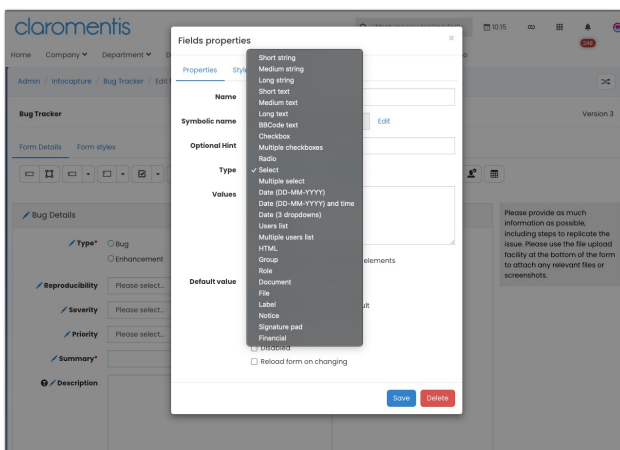
- Form field types
- Symbolic names
- Select field option values

- Consider the impact of changing a field condition set

- SLA timeframe changes will apply eventually

- Form field types

Changing the type of a field in an established form is a major data change.



It is not recommended to change a field type once in use. Doing so will break the database references to past data that was under the old type meaning it will not appear in InfoCapture filtering or reports.

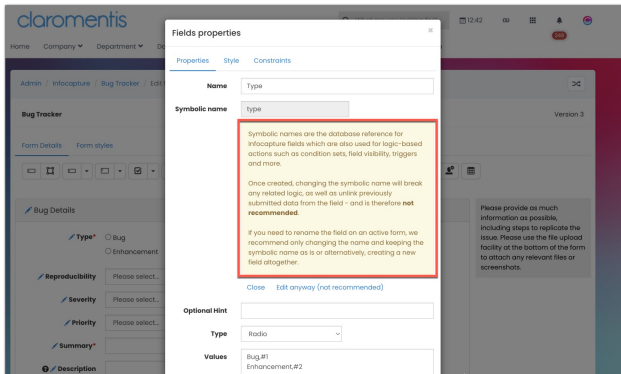
The alternative is to create a new field in the form instead for your new purpose.

If you have already changed the type and tickets have been submitted in the new form version, the fastest way to rectify this is to delete the latest form version to revert the field back to its previous type. Any tickets submitted in that version can be reverted to the previous as well, or simply deleted and resubmitted if more suitable.

- Symbolic names

Used to distinguish between fields in the database, the alternatives to changing the symbolic name is to simply update the label of the field (and leave the symbolic name as it is) or create a new field for your purpose.

A warning explaining this further will appear in Claromentis v8.11+ when attempting to edit the symbolic name:



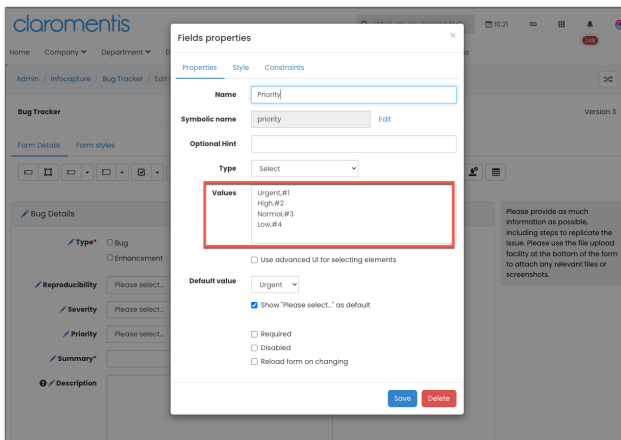
If you do update the symbolic name of an established field, expect to have to rectify form logic in your form following this, which could be time-consuming based on the complexity of your form.

Further to this, previously submitted data in that field can no longer be referenced e.g. in IC filtering, searches or reports which cannot be rectified unless the latest form version is deleted and the form reverts to where the symbolic name was not updated.

- Select field option values

Adding in new 'Select' options and labelling their values consecutively based on the other options is fine to do.

However, changing the values of the options around is not recommended as it will cause issues in the database.



The value is used to denote the selection of that option, so if this has been used in the form in ticket submissions but this value is then changed and checked in for new tickets, the previous references to this option will not be retrievable.

It is necessary to only add new options with increasing value as mixing this around means values are easily overridden in the database, and this is very tricky to unpick.

- Consider the impact of changing a field condition set

Field conditions are true or false statements that we can use to define how the form should react in those situations.

Depending on the complexity of your form, there could be hundreds of field condition sets to maintain.

...as well as the notification trigger it's tied to:

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	In-system	Issue reported: Reporter	Submitter of ticket	⬆ ⬇ ⬇
New issue reported	In-system	Issue reported: Development	Development	⬆ ⬇ ⬇
Type = Enhancement	Email	For Testing dept	Testing	⬆ ⬇ ⬇
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	⬆ ⬇ ⬇

Based on the new conditions being applied, each element that references it may need to be updated to ensure the logic of the form still works as you require.

The areas that will need updating will differ per form and the updates made to its elements will depend on your company's needs for it, which is why it's best to check out field condition sets and how they are used across a form before making updates to them.

- SLA timeframe changes will apply eventually

Making changes to the SLA timeframe requirements will apply to all tickets but not immediately. e.g. Updating the SLA rule highlighted below to be 1HR instead of 3HRS.

Project options

Project summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

Automatic changes

Workflow

Notification

Notifications

SLA

A Service Level Agreement (SLA) is a traffic light system to ensure tickets are dealt with agreed timescales.

This is dependent on Field Condition Sets having first been added and Statuses being enabled. Once these are configured, the next action must be to setup traffic lights such as Within SLA and SLA breached. SLAs are a means of automatically changing a traffic light when a predefined amount of time has passed. For example, you may have a Field Condition Set that a ticket's status is 'Newly submitted'. The SLA rule could change the traffic light to 'Within SLA' and begin running a timer. After 10 hours, the traffic light is automatically changed to 'SLA breached'.

Traffic lights

SLA rules

Statuses

Work time

+ Add new rule

Field condition set	Type of time count	Traffic light	Time interval
<input type="checkbox"/> Status = Submitted	By stopwatch timer	Response needed asap	0
<input type="checkbox"/> Status = Awaiting Confirmation	From latest status change	Awaiting confirmation	0
<input type="checkbox"/> Status = Closed	From latest status change	Closed	0
<input type="checkbox"/> Critical Problem Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>		Response needed asap	Hours: 1

New tickets submitted will follow the updated rule and change after 1HR but past tickets in the form will need some kind of interaction to rectify (where applicable) e.g. editing and saving it, status change etc.

Outside this past tickets submitted before the changes should update when the background task runs (which is every day at 5 AM)

Therefore if you make changes to SLA timeframes it is best to wait at least 24 hours to check past tickets update as expected and if they do not after this period, let us know in a support ticket.

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