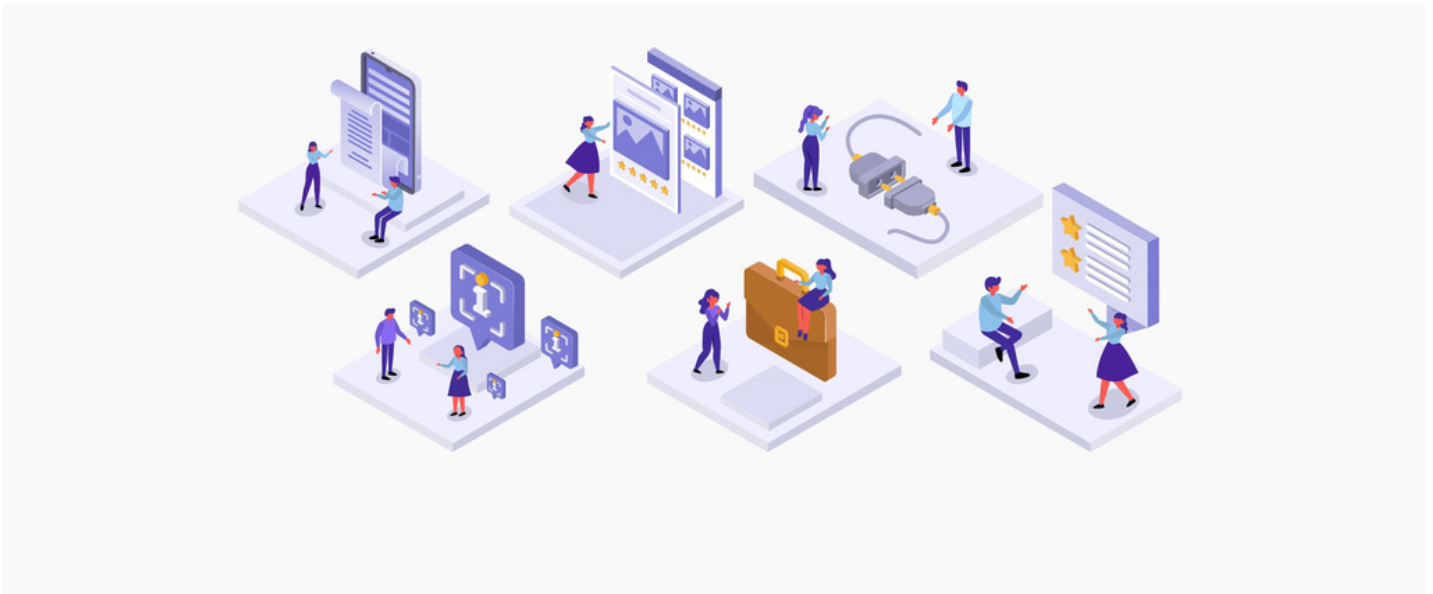




Public Facing Forms

It is possible to make an Infocapture form public and allow users who are not logged in/do not have an Intranet account to submit tickets. ('Guest' will appear as the 'submitter')

Public users can perform certain actions around tickets, **but not all**, so your team need to review the information below to confirm a public form would meet your aims.

The best use case is when you need users without accounts to submit tickets, but they do not need to perform further changes or access the ticket after submission. **Public users also cannot receive emails about tickets.**

This guide details how a public form can be set up.

1. Enable public access on your site

For this to work, your site needs to be publicly accessible.

Please read our guide on public access [here](#).

Only Claromentis staff can enable public access for your site, so please [raise a support ticket](#) to request this once you are ready.

2. Create a form for public use

Either [create a new form](#) for public use, or update an existing one to include the 'public' permission group (which appears once public access has been enabled by our team)

PROJECT OPTIONS

Project Summary

Edit project properties

Project permissions

Statuses

External submission

CONDITIONS

Field condition sets

Triggers

BEHAVIOUR

Field visibility

SLA

Automatic changes

Workflow

Project permissions

Create project roles and define their permissions within the project.

User groups, roles, and individuals can be put into project roles. Each role has its permissions within the project defined here. One role may be given rights to only submit tickets, and a higher role may be given rights to update and assign them, for example. Additionally users can be granted additional rights beyond what their project role would ordinarily allow, just for tickets they have personally submitted and those assigned to them.

Project roles

Rights

Options

All

+ Add new project role

	Role name	Users		
☐	Admin	Role: Administrators		
☐	Development	Group: Development		
☐	Testing	Group: Testing		
☐	Users	Public users All registered		

Delete selected

3. Ensure the 'public' Project role has been given 'submit' rights

In your form, assign the 'public' permission group to [a project role](#) that has 'submit' rights to ensure users not logged in can create new tickets.

Admin

Admin > Infocapture > Bug Tracker > **Project permissions**

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Project roles

Rights

Options

All

	Project role					
	☐ Admin	☐ Development	☐ Testing	☐ Users	☐ Submitter of ticket	☐ Ticket handler
Rights						
View tickets	☒	☒	☒	☐	☒	☐
Update tickets	☒	☒	☒	☐	☒	☐
Submit tickets	☒	☒	☒	☒		
Handle tickets	☒	☒	☒	☐		

When giving rights to the project role, consider the below.

A public user can:

- Submit tickets
- If they can bookmark the link to the ticket once submitted:
 - View and add notes to their own tickets (No name will appear against the note, and they cannot be notified when other notes are added)
 - Change assignment
 - Change status
 - Edit and update their ticket

A public user cannot:

- View other users' tickets
- Handle tickets
- Receive email notifications about tickets
- Upload files to their tickets
- Manage tickets
- View or create IC reports

4. Set up the 'Thank You' page to appear after ticket submission

This can be set up on the admin side of the form in the 'Thank You' tab as detailed in our guide [here](#).

Enter instructions on what will happen next for the public user to view, e.g. they will be contacted via email by your team.

The screenshot shows the 'Admin' interface for Infocapture. The breadcrumb trail is 'Admin > Infocapture > Bug Tracker > "Thank you" page'. The left sidebar contains a 'PROJECT OPTIONS' menu with items like 'Project Summary', 'Edit project properties', 'Project permissions', 'Statuses', and 'External submission'. Below this are 'CONDITIONS', 'BEHAVIOUR', and 'NOTIFICATION' sections. The main content area is titled '"Thank you" page' and contains a help box, 'After submission' options, 'Page type' selection, a rich text editor, and a 'Common Expressions' list.

"Thank you" page

Once a ticket has been submitted, by default the submitting user will be shown the contents of their submitted form. You can instead choose for the user to be taken to a page with text you have written. For example, you may wish for the submitting user to see a message about how long they can expect to wait before receiving a response to their submission.

After submission:

- ☐ Show ticket in view mode (if the submitter has view rights) or the Infocapture main page (if the reporter does not have view rights)
- ☒ Show the thank you page regardless of the submitter's view rights
- ☐ Show the thank you page only if the submitter does not have view rights

Page type

- ☒ Show custom page
- ☐ Go to link

Rich Text Editor:

Thank you for your ticket submission. Our team will review this and contact you directly via email asap.

Common Expressions

- Issue ID
- ID in Project (with prefix)
- Submitter
- Current Handler
- Current Status
- Date, Created
- Date, Last Modified
- URL of "View ticket" page

Public users will not see their submissions listed in Infocapture if they return, so if you need public users to open their ticket after submission, they will need to be instructed to bookmark the ticket in their browser.

Alternatively, you can allow them to view the ticket after submission using the option for this, but as aforementioned, a public user is limited in the actions they can perform in Infocapture, so this is not recommended, but your team are welcome to test what works for you.

5. Decide how to give public users access to the form

Either:

- Users will only need access to the form to make submissions and nothing else

You can simply provide public users with the Infocapture form URL (or the link directly to create a new ticket) so this is all they interact with.

- Users will need access to other parts of the site/you want them to have an 'Intranet' experience

Consider creating [a theme](#) and homepage [for public use](#) and logged-out users are given access to this (and not just the form they can make submissions in)

Enter the public permission across more applications so they can view content and interact.

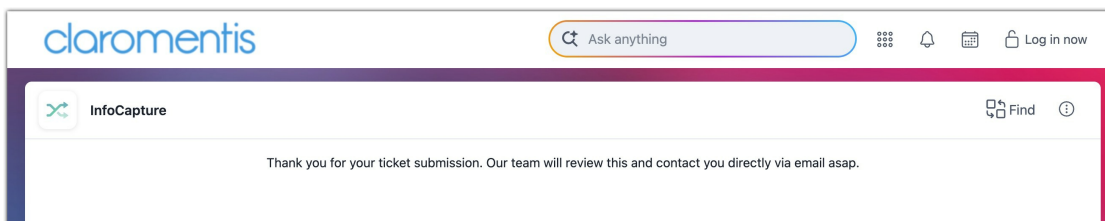
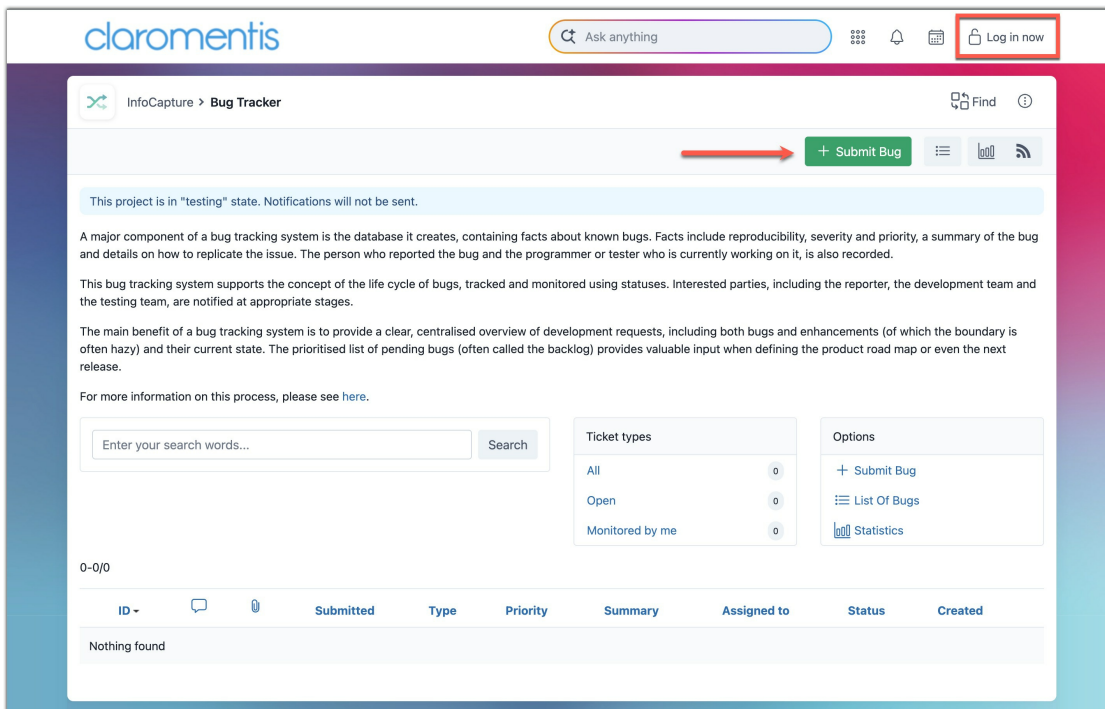
Review what actions a [public user can do](#) to ensure you only give them access to areas they can complete actions in.

5. Test

As a logged-out user, follow the steps based on how you have chosen users to interact with the system and review the experience.

Ensure a ticket can be submitted successfully and what happens after.

This testing will inform further changes administrators can make to the experience.



6. Manage the form over time

Form administrators can make changes to the form and user access as required at any time.

See [our guides](#) for more information.