



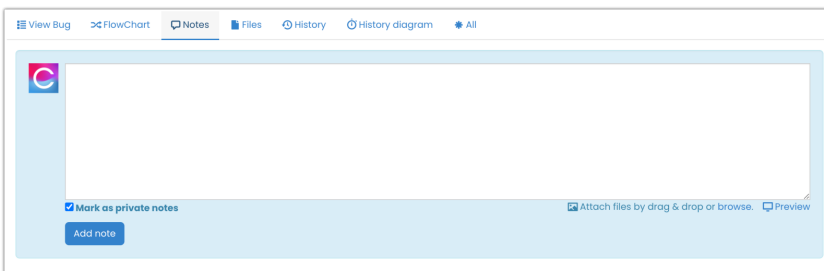
Private Notes in InfoCapture

Private notes allow users to add notes within InfoCapture projects which are only visible to particular users.

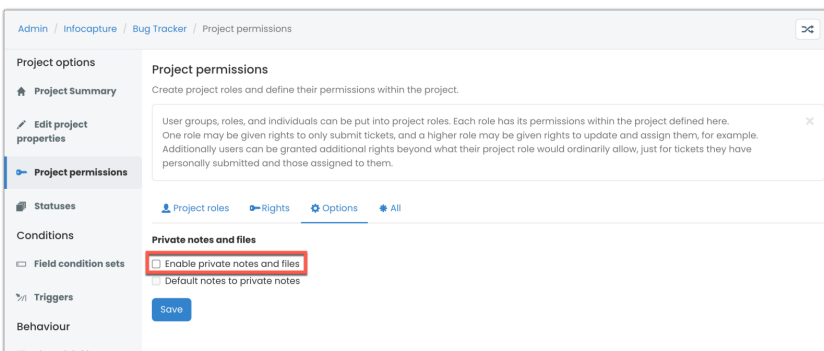
This is useful in cases where certain users need to be able to communicate within a ticket, without the submitter or other party being able to see them.

e.g. the HR department discusses personal information in a form about 'New Starters'.

The notes appear blue to denote they are private, whereas public notes will be white.



The functionality is enabled per project from the 'project permissions' tab:



Once enabled, this will create an additional 'Rights' option to allocate to project roles:

Rights	Project role					
	<input type="checkbox"/> Admin	<input type="checkbox"/> Development	<input type="checkbox"/> Testing	<input type="checkbox"/> Users	<input type="checkbox"/> Submitter of ticket	<input type="checkbox"/> Ticket handler
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submit tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Handle tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Update tickets status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assign tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 type="checkbox"/>
View reports page	<input checked="" type="checkbox"/>	<input checked="" 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"/>		
Private notes and files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

The 'Default notes to private notes' option can also be used, which means when a user goes to write a note it will appear as private by default. It can be changed to a public note using the checkbox before being added.

Admin / Infocapture / Bug Tracker / Project permissions

Project options

- Project Summary
- Edit project properties
- Project permissions**
- Statuses
- Conditions
 - Field condition sets
- Triggers
- Behaviour
 - Field visibility

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

Private notes and files

- Enable private notes and files
- Default notes to private notes

Save

claromentis

Home Company Department Dashboards Compliance Forms Learning Projects Book a Demo

What are you looking for? 11:34

ID: 8T0030 Submitted by: Claromentis Administrator

Status: Pending Testing Assigned

Date of report: 21-06-2023 16:44 Last modified: 21-06-2023 16:46

SLA: Ticket last modified: 1 day ago

View Bug | FlowChart | Notes | Files | History | History diagram | All

Mark as private notes | Attach files by drag & drop or browse. | Preview

Add note

Assign to: [not assigned]

Once added only users with private message rights will be able to see blue notes within a ticket.

Those without the rights will only see public notes.

Any documents included in private notes will appear in the 'Files' tab of the ticket, but these are again only visible to those with private note rights.

Tags: administrator, hidden, role, private, note