



Private Notes in InfoCapture

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

A screenshot of the InfoCapture web application interface. The top navigation bar includes links for 'View Bug', 'FlowChart', 'Notes', 'Files', 'History', 'History diagram', and 'All'. The 'Notes' tab is currently selected. The main content area is a large, empty blue rectangle, indicating where a private note can be added. At the bottom left of this area, there is a checkbox labeled 'Mark as private notes' which is checked, and an 'Add note' button. At the bottom right, there is a link to 'Attach files by drag & drop or browse.' and a 'Preview' button.

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

A screenshot of the 'Project permissions' configuration page in InfoCapture. The left sidebar shows a navigation menu with options like 'Project options', 'Project Summary', 'Edit project properties', 'Project permissions' (which is highlighted), 'Statuses', 'Conditions', 'Field condition sets', 'Triggers', 'Behaviour', and 'Field visibility'. The main content area is titled 'Project permissions' and contains instructions on creating project roles. Below this, there are tabs for 'Project roles', 'Rights', 'Options', and 'All'. The 'Options' tab is selected, and within it, the 'Private notes and files' section is visible. This section contains two checkboxes: 'Enable private notes and files' (which is checked and highlighted with a red box) and 'Default notes to private notes'. A 'Save' button is located at the bottom of this section.

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

What are you looking for?

Home Company Department Dashboards Compliance Forms Learning Projects Book a Demo

ID: BT0030

Status: Pending Testing

Date of report: 21-06-2023 16:44

SLA

Submitted by: Claromentis Administrator

Assigned

Last modified: 21-06-2023 16:46

Ticket last modified: 1 day ago

View Bug FlowChart Notes Files History History diagram All

Mark as private notes

Add note

Attach files by drag & drop or browse. Preview

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.

