

The screenshot shows the 'IC Automator' interface with a navigation bar at the top containing links: Home, E-Forms and Workflows, Knowledge Base, Document Management, Social Collaboration, and People. Below the navigation bar is a table listing scheduled tasks. The table has columns: Schedule Name, Form, Frequency, Start Date, Status, Last Run Progress, and No of Tickets. There are five rows of data, each representing a different scheduled task. A '+ New Schedule' button is located in the top right corner of the table area.

Schedule Name	Form	Frequency	Start Date	Status	Last Run Progress	No of Tickets
test	Branch Manager Weekly Checklist	Once	16-05-2016	Active	100%	1
Weekly Task Trial	Branch Manager Weekly Checklist	Once	16-05-2016	Active	100%	2
A Branch Clean	Branch Manager Weekly Checklist	Once	17-05-2016	Active	0%	1
Workshop Weekly Todo Checklist	Branch Manager Weekly Checklist	Weekly	23-05-2016	Active	0%	0
test	Branch Manager Weekly Checklist	Once	17-05-2016	Active	0%	1

Plugin: InfoCapture Automator & Scheduling

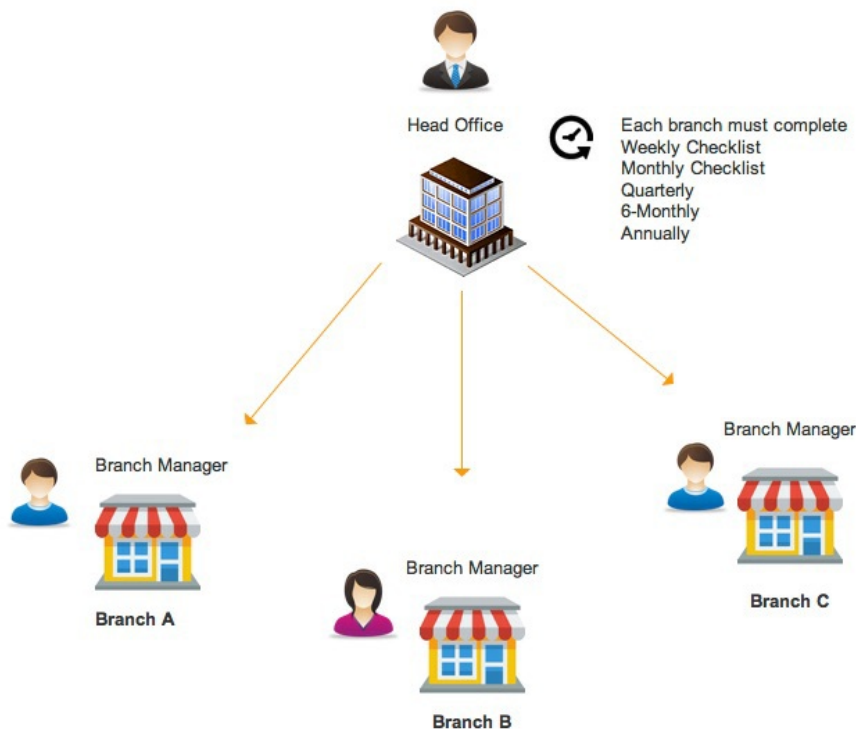
IC Automator

IC Automator is a new module for InfoCapture (BPM) that allows tickets from selected InfoCapture projects to be created and assigned automatically based on a regular schedule.

This functionality is particularly useful in scenarios where regular tasks need to be automated, such as when Head Office needs to distribute tickets/tasks to branch managers to complete on a regular basis.

Here are some useful real-life examples:

- Every week, building managers need to submit information about fire alarm tests, housekeeping, and accident book reviews.
- Every month, a checklist must be completed by each branch manager for emergency light inspections, first aid box content, and health & safety reports.



Requirements

- Claromentis 7.4 or above
- IC Automator

This feature is only available for customers who have purchased the BPM Platform. Please contact our Support Team for further information.

InfoCapture Projects

If you wish to automate your existing InfoCapture project, the following fields must be added to your InfoCapture Form:

1. Schedule ID

Symbolic name: icauto_schedule_id

Type: Select

Disabled: Checked

This field is required to allow IC Automator to identify the origin of the schedule for filtering.

Field Properties ✕

Properties

Style

Constraints

Name

Schedule ID

Symbolic name

icauto_schedule_id

Optional Hint

Type

Select

Values

☐ Use advanced UI for selecting elements

Default value

☒ Show "Please select..." as default

☐ Required

☒ Disabled

☐ Reload form on changing

Save

Delete

2. Batch Number

Symbolic name: icauto_batch_number

Type: Select

Disabled: Checked

This field is required to allow IC Automator to identify the batch number and to track progress of completion.

Field Properties ✕

Properties

Style

Constraints

Name

Batch Number

Symbolic name

icauto_batch_number

Optional Hint

Type

Select

Values

☐ Use advanced UI for selecting elements

Default value

☒ Show "Please select..." as default

☐ Required

☒ Disabled

☐ Reload form on changing

Save

Delete

Form «Branch Manager Weekly Checklist» Version 7

Form Details Form styles

Weekly Checklist

Title * Branch Manager Weekly Checklist

Conducting Fire Alarm Test ☐

Fire Alarm test date & time

Fire housekeeping ☐

Accident book review ☐

Completing Building Safety Inspection ☐

First aid kit check ☐

Discard all changes Preview form Check in form

Status

IC Automator is designed to work with 2 statuses:

- Open [when the ticket is generated automatically the status will be = open]
- Closed [in order to track progress completed task must have status = closed]

It is possible to have any statuses in between, such as "In progress"

Change order	Title	Colour	Description	Group name	Archiving age	
open	Open	#ffff00	New issue		none	
progress	In progress	#00ffff	Issue in progress	In Progress	none	
closed	Closed	#0000ff	Issue closed		none	

Access

After installation, this plugin can be accessed by the URL below (amending the URL as appropriate to your domain):

<http://yourdomainname.com/intranet/icautomator/>

FAQs

At what time during the day will the automated ticket creation be triggered?

Currently it is set to be triggered at 07:00 based on the day/rule specified.

This can be customised by creating a custom config file that overrides the default:

`/intranet/icautomator/config_icautomator.php`

Will users get notified during the ticket creation?

Yes, if you setup your InfoCapture project to send notifications to the handler, and the checkbox "Send notification upon ticket creation" is ticked.

Is it possible to customise the reminder message?

It is possible to change the default message by creating a custom notification file in the following location:

`/intranet/icautomator/languages/notification/en_custom/icautomator.reminder.txt`

Please make sure any changes you make work for all possible IC Projects you wish to automate.