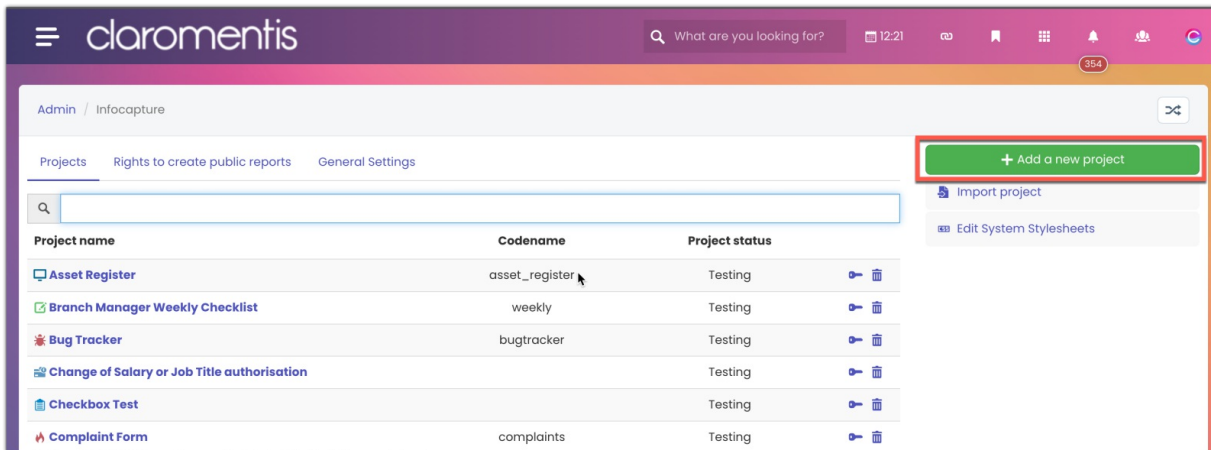


# Infocapture: Edit project properties

## Creating a new form

Watch the video above and follow along with it and this guide to familiarise the form creation process.

From Admin > Infocapture an administrator of the application can create a new form by clicking 'Add a new project'



The available settings, in order:

**Project Name:** The title of your project. The form's purpose should be clear and meaningful to the users from its name.

**Project Status:** Set to 'Blocked' for the project to only be visible from the admin side until you are ready. Set to 'Testing' if you wish it to be visible on the 'front end', but the project will not send out any notification emails. Set to 'Active' if you wish for the project to be visible, and to allow notification emails to go out.

**Change Icon:** Pick an icon that matches the form's purpose. The colour can also be changed.

**Describe its purpose:** This short description will appear to other administrators when viewing your list of available projects under Admin > Infocapture. You may find it useful to add a note here if you're still testing, to let other administrators know to not yet set the status to Active.

**Short description:** A sentence that can appear at the top of the page when users access your form. You may instead wish to use Full Description for a more attractive message with formatted text.

**Full description:** A text editor that can allow you to put formatted text or images at the top of the page when users access the form. This is useful for adding a corporate branding image as a header, or a message about what the user needs to know before filling out the form.

**Codename:** Without picking a codename, your project will have a URL that looks like this:

[http://www.yourintranet.com/intranet/infocapture/project.php?project\\_id=88](http://www.yourintranet.com/intranet/infocapture/project.php?project_id=88)

If you do pick a codename, it can instead appear as..../forms/(codename) for example:

<http://www.yourintranet.com/forms/onboarding>

**Tags:** Help users to find the project when searching, through the use of tags.

**Copy project from:** Choose a pre-existing form on your site to replicate in the new project (if applicable)

Once all appropriate fields have been filled out, the administrator can click 'save' to create the new form.

The next screen will show the admin side of the project, where the rest of the form can be configured.

Follow along in our next guide '[Roles & permissions](#)'.

## Edit Project Properties

Once a project is saved an administrator can access the fields that were filled out at project creation as well as additional settings from Admin > Infocapture > Your Project > Edit Project Properties

The screenshot shows the 'Edit project properties' page in the Claromentis interface. The sidebar on the left contains a list of navigation items: Project Summary, Edit project properties (highlighted with a red box), Project permissions, Statuses, Conditions, Field condition sets, Triggers, Behaviour, Field visibility, SLA, Automatic changes, Workflow, and Notification. The main content area is titled 'Edit project properties' and includes a sub-header 'Use these options to define the project's primary settings. From here the project can be renamed, enabled and disabled.' Below this, there are several form fields: 'Project name' with the value 'Asset Register', 'Describe its purpose' with a text area, 'Project status' with a dropdown menu set to 'Testing', and 'Short description' with a text area. There is also a 'Change Icon' button with a monitor icon. The top of the page shows the Claromentis logo and a search bar.

The extra settings available settings are, in order:

**Handle incoming mail:** Emails can be fetched from a mailbox and converted into tickets. You may find it easier to set this up after you have finished building your form later. MailGun can be used for this and our set-up guide is [here](#).

**From address for email notification:** The source address of any emails that this project will

send, for example, *no-reply@yourcompany.com* or *recruitment@yourcompany.com*

**Assigned field appears:** If you wish to allow individual form submissions to be assigned to individuals within the company, you'll need to tick this box. This will allow the 'Assign to' dropdown list to appear at the bottom of each submission, alongside the Status dropdown list if that too is enabled.

**Tickets ID prefix:** Without a prefix, forms will have an ID of a numerical string such as 03241 . You may wish to have it prefixed with an acronym or abbreviation so that tickets have IDs such as EXIT03241

**Reset Counter:** This will ask the system to check for the current highest ID and attribute the next number to the next new submission. This is useful when tickets have been deleted from the project allows the IDs to be reused and ensures no ID gaps.

**Plugin class name:** If you're looking to extend the functionality of the Infocapture application, we can write a plugin to meet your needs. Once written, the name of the plugin is specified here so that it is loaded whenever the form is used. [Find out more about custom plugins here.](#)

## Recommended next article:

# Roles & Permissions

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