

## Infocapture: Creating a new form

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### First create a new project

From Admin > Infocapture a new project can be created (in which your form will reside in)

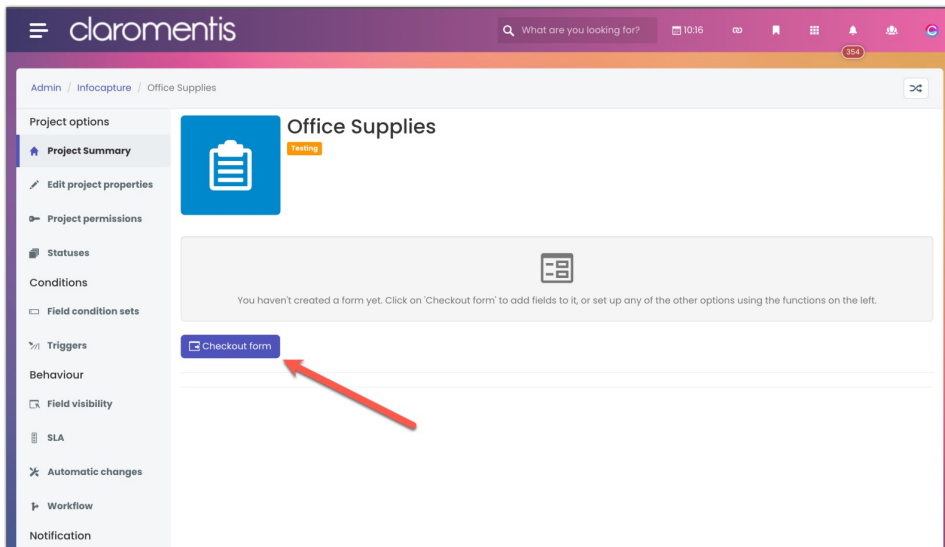
Follow the guide [here](#) to fill out all the necessary information to create the project.

Return [here](#) to see how to begin building out the form fields themselves.

# Using the form builder

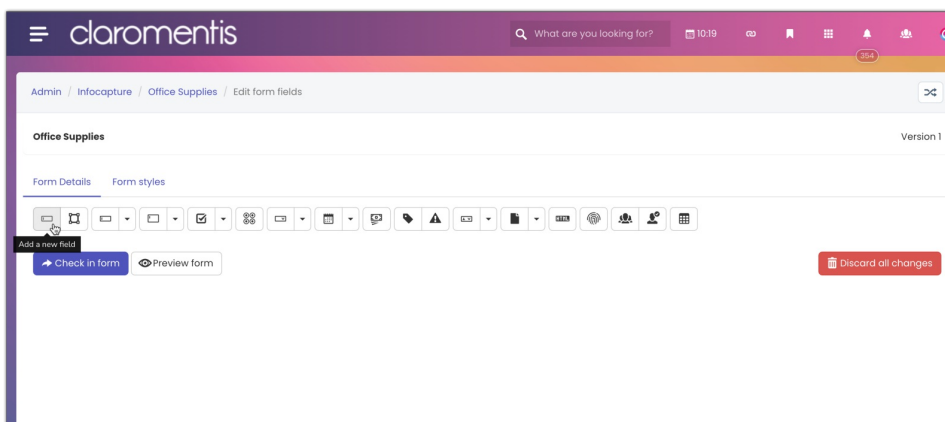
When a project has been newly created the admin side will display the message 'You haven't created a form yet. Click on 'Checkout form' to add fields to it, or set up any of the other options using the functions on the left.'

Click the 'Checkout Form' button to start adding your form fields.

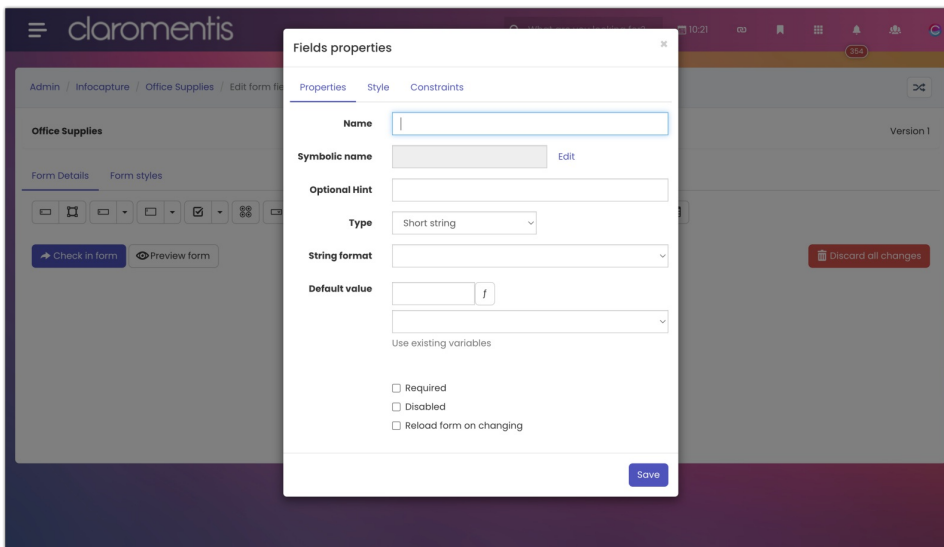


## Adding fields

Click the 'add a new field' button here:



This presents the 'Fields Properties' screen:



### - Field Label and Symbolic name

Give your new field a name. This is the text label that will appear beside the field, and will be visible to the user.

Once you've entered a name, Infocapture will copy it to the symbolic name field just below.

The symbolic name is not visible to the user and is only used in the background, unseen from the front of the form.

The symbolic name is a reference, used by Infocapture as an identifier when the form loads and works through logical processes and so must always be unique.

**Please note:** Once a field has been created and is in use in a live form DO NOT edit the symbolic name as this will [overwrite ticket data](#) stored under the previous name.

A way to remember this is that the field label/name is what the human user recognises as the field being called, and the symbolic name is what the computer system sees.

### - Optional hint

Use the optional hint to add a tooltip to the field (if applicable)

This is really useful when the field label isn't enough to indicate to the submitter what information is required, so a hint can be added to assist them.

A question mark symbol will appear to the left of the field label, which the user can hover over to receive more information on what exactly they should be input into the field.

## - Field Types

The type of field is very important. This needs to be suitable for the kind of information you're trying to collect.

The options are:

**Short, Medium and Long string:** For entering text, numbers, and emails. Choose one of the three options depending on how wide you would like the field to be.

You will also be asked to choose "String format":

- **Text:** For allowing any input.
- **Integer:** Allow a numerical value, *without* allowing the use of a decimal place.
- **Floating point:** Allow a numerical value, *and do allow* the use of a decimal place.
- **Email:** Only allow an email to be input. If you choose this option, you will later be able to set notifications to go to whatever email is specified in this field.

**Short, Medium and Long text:** For larger text inputs. Whereas the String field is one line tall, these text fields are taller boxes. A Medium or Long text box would be suitable where you are expecting your user to type out a paragraph's worth of information.

**BBCode text:** This is a similar text box, but it will allow the user to [use BBCode formatting](#) on their text if they wish to use bold, italic, or underlining.

**Checkbox:** A single checkbox, useful for true/false statements.

**Multiple Checkbox:** A list of checkboxes. **Important: Multiple checkboxes cannot be used later with field conditions.** You will not be able to set up any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use multiple checkbox fields if you're interested in having users tick off a list of options, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**Radio:** A row of options, where the user can only pick one. All the options are visible at once in a row, or a list if you go to the 'style' tab and uncheck 'horizontal layout'.

**Select:** A list of options, where the user can only pick one. Options are presented in a dropdown list. Enter your list options in the order you'd like them to appear, in the 'values' box. Once added, if you edit the field you'll notice Infocapture has added a comma and an identification number to each of your list options.

Do not amend these numbers, they are [used to reference how the data is stored in the database](#), rather than where they

appear on the list. To remove a list option, remove the whole line including this reference number.

If your list has many options, you may wish to tick the box 'Use advanced UI for selecting elements' This will allow your users to type in the list option they're looking for, and it will search the list for them.

**Multiple select:** A list of options the same as above, but the user can pick more than one. It's recommended that you do tick the checkbox *Use advanced UI for selecting elements* if using this field. **Important: Multiple Selects cannot be used later with conditions.** You will not be able to set up any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use a multiple select list if you're interested in having users select multiple options from a list, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**Date fields:** You have three options, a standard date picker, one that includes a time picker as well, and a date picker using dropdown lists.

**Users list:** Select a user from your intranet. If your list has many options, you may wish to tick the box *Use advanced UI for selecting elements*. This will allow your users to type in the list option they're looking for, and it will search the list for them. Once you have saved this field, you will need to edit it and click 'Edit Selectable Users', to define who should appear in this list. e.g. If you wanted to have only managers available, add in a People Role/Group that encapsulates them 'Group: Managers' or similar.

**Multiple users list:** Same as above, but with the ability to select more than one user. **Important: Multiple Users lists cannot be used later with conditions.** You will not be able to set up any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use a multiple users list field if you're interested in having users select multiple users from your intranet, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**HTML:** Allow the user to see and use CKEditor, a text editor. It is rare that you will need to allow a user to enter rich formatted text, so the use of this field is unlikely.

**Notice:** This is for entering text onto the form, as well as pictures. Data isn't entered by the user for this field type. You are presented with CKEditor to enter your text and images.

A notice field is especially useful if you need to enter your own text onto the form for your users to see. For example, you may wish to describe how exactly you would like them to fill out the form, and what they can expect once they've submitted.

**Group and Role:** These are for selecting user groups and roles, as defined in Admin > People > Groups and Roles. The need for this field is rare, it is fairly unlikely you will use these field types.

**Document:** Allows a user to select a file from the [Documents application](#).

**File upload:** This is for uploading a file directly to the form, however **-only use this field type if** you want to be able to hide this file upload later. The form will have a file upload section anyway, visible to all those with 'attach files' permission in the rights table. You would only want to use this file upload field type if, for example, you only want the individual submitting the form and anyone in the 'Managers' role to be able to see this file that's being uploaded here, but for anyone else you don't want them to see it.

Do keep this in mind, as 9 out of 10 times it is better to use the standard File Upload section at the bottom of the form - i.e. do *not* use this field type in most cases.

**Label:** This is for adding a small amount of text to the right of the form. Useful for adding a commentary note on a group of fields, for example. Data isn't entered by the user for this field type.

**Signature pad:** An electronic signature field. The user can type out their name, and the field will record and display the exact

time and logged-in user who performed this action.

**Financial:** Intended for number values that must be kept to two decimal places, such as financial amounts.

## Other options

When creating fields, you'll see the option to add a Default Value. This is useful if you wish for a particular piece of data to already be populated in the field when a new form is created. e.g.

The screenshot shows the Claramentis form editor interface. At the top, there's a search bar and navigation icons. The main area displays a form titled 'Office Supplies' with the following fields: 'Type' (radio buttons for Bug and Enhancement), 'Reproducibility' (dropdown), 'Severity' (dropdown), 'Priority' (dropdown), 'Summary' (text input), and 'Description' (text area). A red box highlights the 'Additional Information' field, which contains the text: 'Please include a monetary estimate for this internal project in your response'. At the bottom, there are buttons for 'Submit', 'Discard', and 'Save draft'.

**'Required'** is used if it should be mandatory that the user adds data to that field. Required fields will be flagged if a user tries to submit a ticket as empty, they cannot proceed until they are filled in.

**'Disabled'** is used if you would like the field to be 'greyed out' so that it can be seen but not amended.

If you wish for some users to be able to edit, but not others, then don't use 'disabled' - change later instead using [Field Visibility](#) within the project properties.

**'Reload form on changing'** is required if you plan to later implement any Field Visibility rules. For example, if a checkbox labelled 'Additional comments' is ticked, I want a large textbox to appear. I would set this checkbox to reload form on changing so that the page quickly reloads (whilst the user is still submitting) and sees that the box is now ticked, so a [Field Condition](#) has now become true (that the box is checked), and as a result, the Field Visibility rule to reveal a textbox occurs.

## Creating sections

You may find it useful to break up your form into sections. At the top, use this 'Add Section' button:

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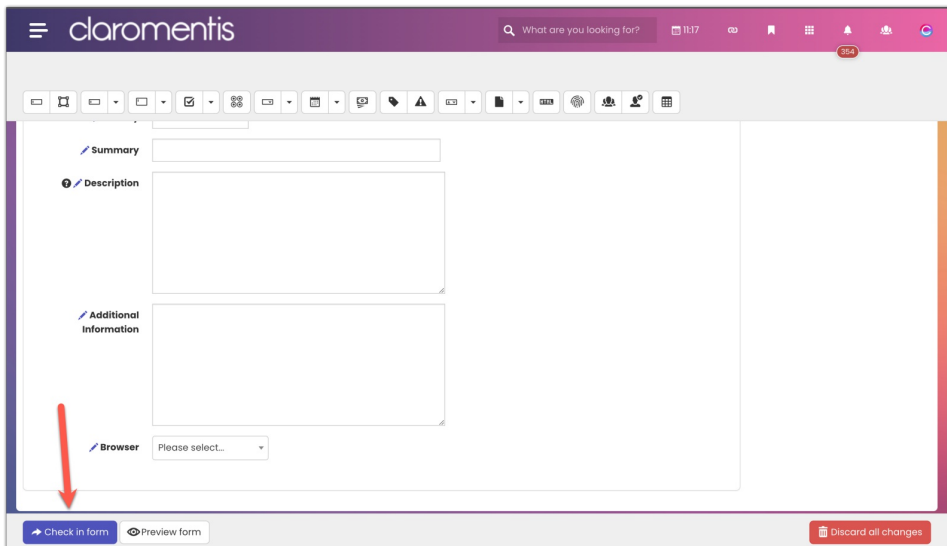
This will allow you to divide up the form into areas that ease the understanding of the form's purpose.

For example, you may have a section called 'Initial Request Information'. A second section may be called 'Manager's comments'.

If you have already added fields to your form, you can choose which section they should belong to by editing the field and changing its position within the 'Style' tab.

## Saving your work

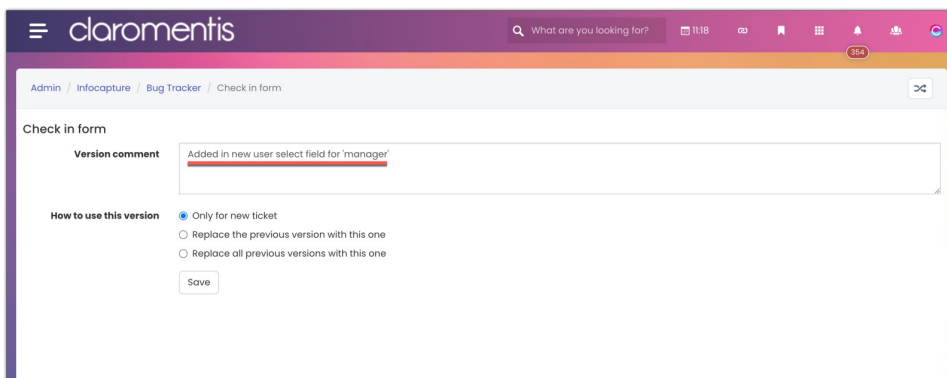
When you have finished, click 'Check In Form' at the bottom of the page.



**Please note:** Changes will only be saved and applied when the form is checked in

Forms have versioning, which means new changes are saved under a new iteration and can be reverted (by deleting versions) if required.

If you are about to save a new version of a form beyond the first, i.e. you have amended an existing form, leave a version comment when checking in the form explaining exactly what you amended.



It is essential that this is done - without the version comment, it is almost impossible for other administrators and for the Claromentis Support team to be able to tell what's different between versions, making troubleshooting much more difficult.

Once a form becomes established and users are submitting tickets to it, you may need to make edits to it over time.

Learn about which option to choose at check-in [here](#).

## Example project showing all form fields

[Download example project](#)

Import it onto your site from Admin > InfoCapture > Import Project

Add your profile to the 'All users' project role and save it to give you access to its front end.

Now edit the form fields and take a look at how each type appears to administrators.

Following this go to the front end of Infocapture and start to submit a ticket for this project.

See how the fields appear to an end user when filling them out.

After submitting a ticket, take another look at how the answers appear in the ticket itself.

Use this to make informed decisions about the field types that will be appropriate for your use case based on their nature, how they appear to the user and in the ticket once saved.

## Example screenshots of form fields

Here are some screenshots of a form that has one of each kind of form field on it.

These are how the form fields appear to an end user viewing a form you have created. You'll see that many of the fields contain example data and text.

Text and string fields	
Short string	text here
Medium string	text heretext here text here text here text here text here text here
Long string	text here text here text here text here text here text here text here text here text here text here text here text here text here
Financial	23.99
Short text	text here text here
Medium text	text here text here text here text here text here text here text here
Long text	text here text here
BBCode text	<b>text here text here</b> <i>text here text here</i>

Select fields	
Single checkbox	Yes
Multiple Checkboxes	One, Two, Three
Radio buttons	Bilberry
Select dropdown	Daphnee Schoen
Select field with search	Atlanta Hawks
Multiple Select	Accounting & Finance, Agriculture & Forestry
Date	05-05-2023
Date and time	05-05-2023 01:30
Date (3 dropdowns)	07-02-2023
User Select	Dan Butler
Multiple User Select	John Vance, Joshua Tucker, Phil Lawrence



Other field types

HTML


Hello this is a html field

This is a Notice field, which allows the use of CKeditor, a WYSIWYG editor.

*I can include text that can be formatted as I like*

**This differs from the HTML field in that the user cannot see the editor, just whatever text has been input by the form creator.**

**This field type can also be used to insert images like so:**




Group

Finance, Leadership Team, Market Intelligence

Role

Administrators, Handlers

Document select from DMS

 Using an Agile Approach in a Large, Traditional Organisation.pdf

File upload

Sample Document 10.pdf

Label field, for providing a label off to the right of the form.

Signature pad

Hannah

Claramentis Administrator, 05-05-2023 11:38

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