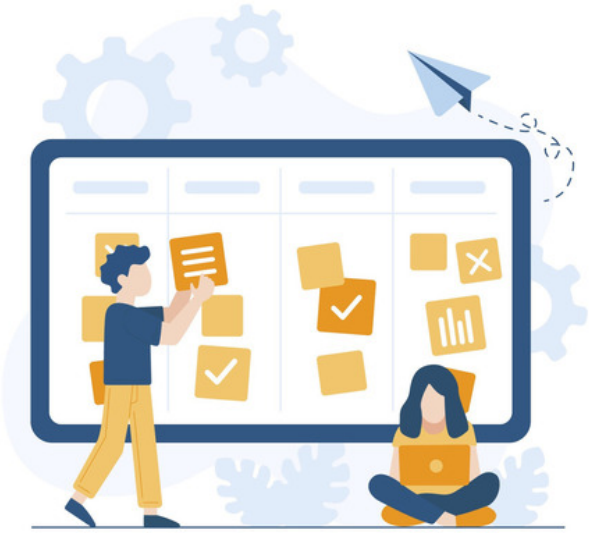
Link to article: https://discover.claromentis.com/knowledgebase/articles/434/infocapture-statuses



Infocapture Statuses

While some InfoCapture projects' purposes are just for data collection, others may have a more comprehensive workflow to adhere to and in InfoCapture statuses define the stages tickets will move through.

Statuses may be as simple as...

New > In Progress > Closed

... or maybe much more complex.

Unlimited statuses can be created and the order in which they appear can be controlled, to form the most logical workflow for the use case of your form.

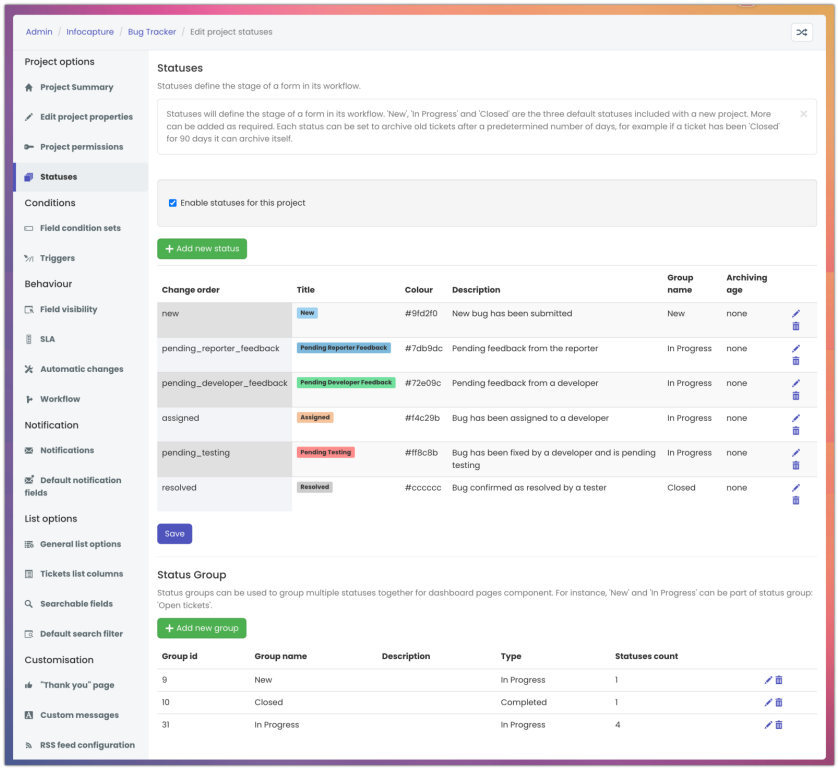
Brainstorm with your form administrators ahead of time to come up with statuses your form would need to have so these can be created.

Status tab

Users belonging to Project Roles with 'Update issue status' rights are able to change the status to any other status, at any time. This can be restricted, thus forcing users through a stricter workflow.

This ensures the issue progresses along its predefined path while including the necessary employees at the right time.

Head to Admin > Infocapture > Your Project > Statuses



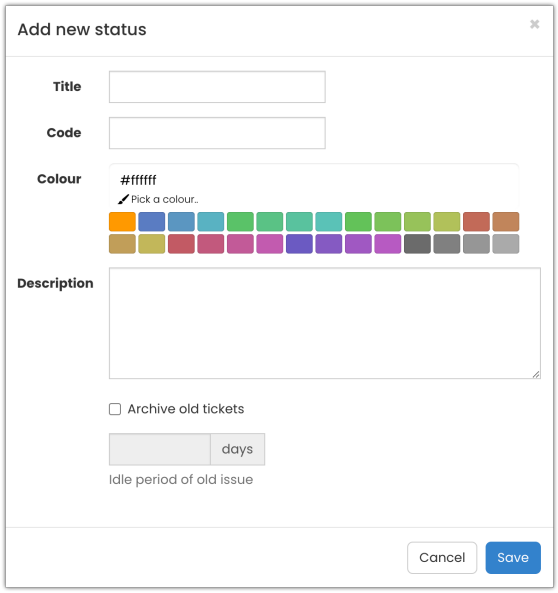
Ensure the checkbox is ticked to allow statuses to be used if this has not already been done.

For any newly created project, there are three default statuses. These can be renamed or removed if you wish:

New
In Progress
Closed

Creating statuses

Create a status for each stage in your workflow, ensuring you are keeping the process as efficient and simple as possible; The fewer statuses, the better.



The **Code** is similar to the **symbolic name** of form fields - you may remember it's an identification reference the system uses, but not something seen by the user.

The **Title** is the word or phrase that they will see.

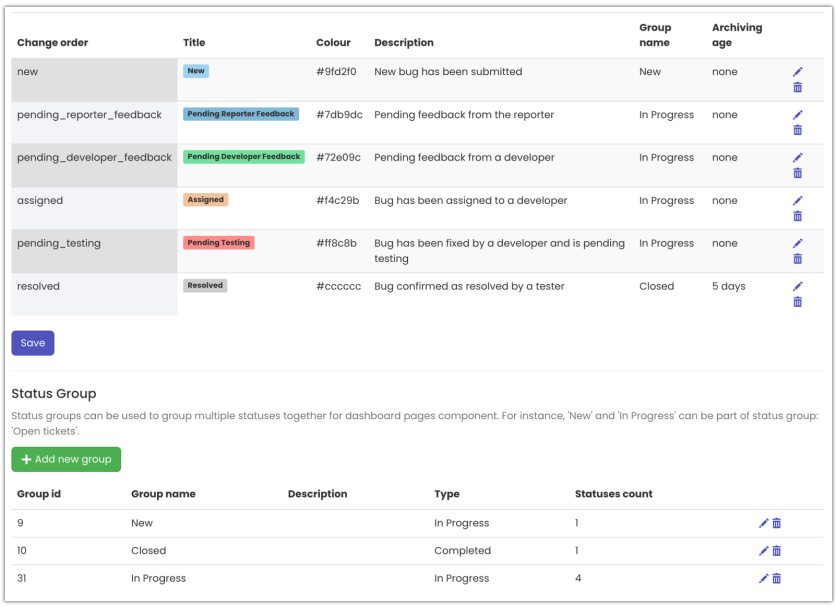
Add a **Description** if you wish to explain to other administrators how you intend this status to be used.

If you wish to keep your list of tickets short and simple, make use of the**Archive old tickets** checkbox for any of your closed/finished statuses. After a number of days that you specify, the ticket will archive and disappear from the active list of tickets. This prevents affecting load times of the active ticket

list as archived ones won't be listed on the front end but can still be searched for.

Click 'Save' once you've added all the statuses you need.

New statuses can be added in at any time by form administrators with consideration of how this will affect the current processes and how they can integrate the new one into the established form.



Change order	Title	Colour	Description	Group name	Archiving age
new	New	#9fd2f0	New bug has been submitted	New	none
pending_reporter_feedback	Pending Reporter Feedback	#7db9dc	Pending feedback from the reporter	In Progress	none
pending_developer_feedback	Pending Developer Feedback	#72e09c	Pending feedback from a developer	In Progress	none
assigned	Assigned	#f4c29b	Bug has been assigned to a developer	In Progress	none
pending_testing	Pending Testing	#ff8c8b	Bug has been fixed by a developer and is pending testing	In Progress	none
resolved	Resolved	#cccccc	Bug confirmed as resolved by a tester	Closed	5 days

Save

Status Group

Status groups can be used to group multiple statuses together for dashboard pages component. For instance, 'New' and 'In Progress' can be part of status group: 'Open tickets'.

+ Add new group

Group id	Group name	Description	Type	Statuses count
9	New		In Progress	1
10	Closed		Completed	1
31	In Progress		In Progress	4

Status Groups

It's useful to define which of your statuses constitute 'In Progress' and 'Closed'. Edit these groups and use the checklists available to make this specification.

This is used by the Pages application component 'Open Items'. So, for example, you may wish on your homepage to have a component showing a short list of the tickets in this project that are currently open. Once you've added at least one status into the 'Open' group, that component can be used to list these.

Recommended next article:
Field Conditions

Created on 7 August 2018 by Hannah Door. Last modified on 21 June 2023
Tags: infocapture, user guide, status, statuses