

Project Options: Statuses

While some Infocapture projects may be used only for data collection, others may have statuses defined. Statuses may be as simple as...

New > In Progress > Closed

... or may be much more complex.

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

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*

N.B. If your intranet was installed or last updated prior to July 26th 2018 (version 8.4), then instead head to *Admin > Infocapture > Your Project > Edit Project Properties > Manage 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. They are:

- 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. Remember: The fewer statuses, the better.

When creating a new status, the *Code* is similar to *symbolic name* when you created your form - you may remember it's an identification reference the system uses, but not something seen to 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 visible list of tickets. The data won't be lost and can still be found later if needed.

Click Save once you've added all the statuses you wish to keep.

+ Add new status

Change order	Title	Colour	Description	Group name	Archiving age	
new	New	#ffec9f		Open	none	
pending	Pending Monthly Invoice	#f4c29b		Open	none	
invoice_sent	Monthly Invoice Sent	#7db9dc		Open	none	
pending_termination	Pending Termination	#ccc		Open	none	
inactive	Terminated	#929292		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	
297	Open		In Progress	4	
298	Closed		Completed	1	

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.

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