Introduction to Infocapture

What is Infocapture?

A Business Process Management application for creating bespoke e-forms and workflows to match your existing business processes. Save time, paperwork, and resources by leveraging the strength of the Infocapture platform.

End users submit tickets in the project and administrators or responsible users manage the forms over time by making necessary changes.

Forms can contain multiple fields and sections, with areas of the form dynamically hidden or shown based on the data previously entered. The methods used to set up a form are essentially a logic problem that form administrators will need to understand to effectively manage them.

To ensure employees move through each process efficiently, automatic notifications can be issued once certain timeframes have been reached or conditions have been met.

Service Level Agreements can act as timers to record the progress of each form reported, enabling urgent tickets to be flagged sooner than those that have a lower priority.

Your homepage or other webpages can include dashboard components, allowing you to view and analyse critical information about your Infocapture workflows at a glance.

Want training?

InfoCapture is our most complex application so we understand there is a steep learning curve to get to grips with it.

We have put together the written guides shown in the index below to walk through each section of InfoCapture to support your learning of the tool and help maximise what you can get out of it when building your forms.

If at any point you are stuck on how to achieve something or would like to undergo formal training, we have an InfoCapture consultancy service, where our InfoCapture experts can assist you further.

Submit a ticket here to access our consultancy service

Beginner guides index

These guides are intended for site administrators or responsible users - those who will create and maintain your forms.

It is recommended to start at the top and work through to the bottom in order as this matches how sections are considered when creating a form.

Project properties

Project roles & permissions

Further learning

Deleting tickets

Best practice guides:

Administrator top tips

Form functionality changes

Investigative tools

Infocapture scenarios:

Additional recipients field

Auto-populate metadata

If you'd like to see some pre-made forms to assist your learning, take a look at our free Infocapture templates.

If you're confident with the basics, browse the Infocapture advanced tips Knowledge Base articles.

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