



## How to configure and search for archived tickets in InfoCapture

### Introduction

In InfoCapture you can set an 'archiving age' for one (or more if appropriate) status(es) in your form.

This means after a certain duration of days the tickets will be pushed to 'archived' automatically and they won't appear in the ticket list from the front end.

Tickets are still accessible in your system via advanced search or by ticket reference number and once archived the ticket cannot be reverted back.

This guide will outline how to set this up as well as how to search for archived tickets.

**⚠ We use this archiving process here on Discover for our support, upgrade and change request ticket projects**

**If you are ever concerned you cannot see a previous ticket you submitted it has likely been archived**

**See the section below for methods to access these**

### Configure archiving age

From the admin side of your form head to the 'statuses' tab.

Here you will see whether an archiving age has already been set per status or not.

In my example the 'asset register' form I am looking at does not have any set for any status, Image 1 below.

Project options

- Project Summary
- Edit project properties
- Project permissions
- Statuses**
- Conditions
- Field condition sets
- Triggers
- Behaviour
- Field visibility
- SLA
- Automatic changes
- Workflow
- Notification
- Notifications

Statuses

Statuses define the stage of a form in its workflow. 'New', 'In Progress' and 'Closed' are the three default statuses included with a new project. More can be added as required. Each status can be set to archive old tickets after a predetermined number of days, for example if a ticket has been 'Closed' for 90 days it can archive itself.

Enable statuses for this project

**+ Add new status**

Change order	Title	Colour	Description	Group name	Archiving age
operational	Operational	#72e09c	Asset is operational	Open	none
broken	Broken	#7db9dc	Asset is broken	Open	none
in_repair	In Repair	#f4c29b	Asset is being repaired	Open	none
lost	Lost	#ff8c8b	Asset has been lost	Closed	none
stolen	Stolen	#ff8c8b	Asset has been stolen	Closed	none
retired	Retired	#ccc	Asset has been retired	Closed	none

**Save**

Image 1

I can change this by clicking on the pencil icon to the right and adding a number into the archiving age field given in the pop-up, Image 2.

You can select an appropriate day duration that best fits your form and company processes.

Once a ticket has not been interacted with beyond this set duration it will archive automatically.

You can edit the archive age of a status in this way at any time (remember to click the 'save' button to apply!)

**Please note:** The system cannot retroactively apply an archiving age to tickets. Once the age has been set tickets will only begin to archive once this duration has passed regardless of the date the ticket itself was submitted. Once a ticket has become 'archived' it cannot be changed back to a 'live' ticket but can still be interacted with.

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- Statuses
- Conditions
- Field condition sets
- Triggers
- Behaviour
- Field visibility
- SLA
- Automatic changes
- Workflow
- Notification
- Notifications
- Default notification fields
- List options
- General list options

Enable status

**Edit status 'Operational'**

Title	Operational
Code	operational
Colour	#72e09c ✓ Pick a colour.
Description	Asset is operational

Archive old tickets

14 days

Idle period of old issue

**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
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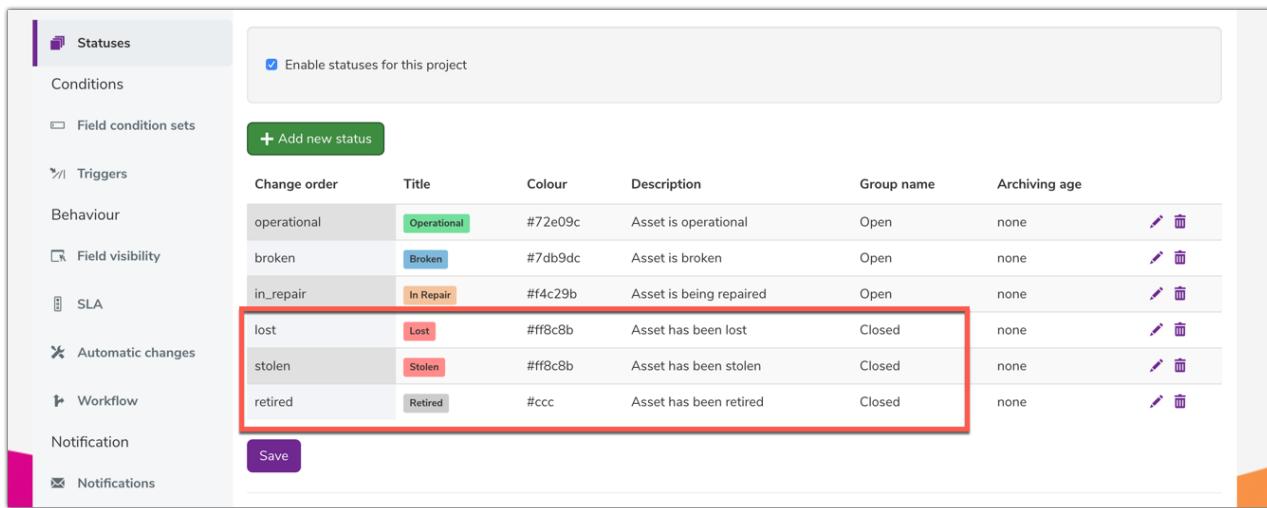
## Which status(es) should be archived?

Depending on the nature of your form you should apply an 'archiving age' to statuses that generally mean the enquiry has been completed and now could be earmarked as closed.

You may even have statuses already called 'completed' or 'closed' which being literal will be easy to spot and add an archiving age to. However, any status that generally falls in with this logic will be appropriate to attribute an archiving age to.

For example, the status of a 'new' ticket being submitted likely won't need an archiving age as you wish ticket handlers to interact with them. Whereas a status of 'application approved' has likely reached the end of the project workflow required and has a conclusive outcome. Therefore an archiving age would make sense to be applied to it.

In my 'asset register' project example the three statuses shown in Image 3 make the most logical sense to be archived after a certain time as no further action is going to be taken on the tickets.



The screenshot shows a 'Statuses' configuration page. At the top, there is a checkbox for 'Enable statuses for this project' which is checked. Below this, there are sections for 'Conditions', 'Field condition sets', 'Triggers', 'Behaviour', 'Field visibility', 'SLA', 'Automatic changes', 'Workflow', 'Notification', and 'Notifications'. The 'Automatic changes' section contains a table with the following data:

	Change order	Title	Colour	Description	Group name	Archiving age
Behaviour	operational	Operational	#72e09c	Asset is operational	Open	none
Field visibility	broken	Broken	#7db9dc	Asset is broken	Open	none
SLA	in_repair	In Repair	#f4c29b	Asset is being repaired	Open	none
Automatic changes	lost	Lost	#ff8c8b	Asset has been lost	Closed	none
Automatic changes	stolen	Stolen	#ff8c8b	Asset has been stolen	Closed	none
Automatic changes	retired	Retired	#ccc	Asset has been retired	Closed	none

The last three rows (lost, stolen, retired) are highlighted with a red box. At the bottom of the table is a 'Save' button.

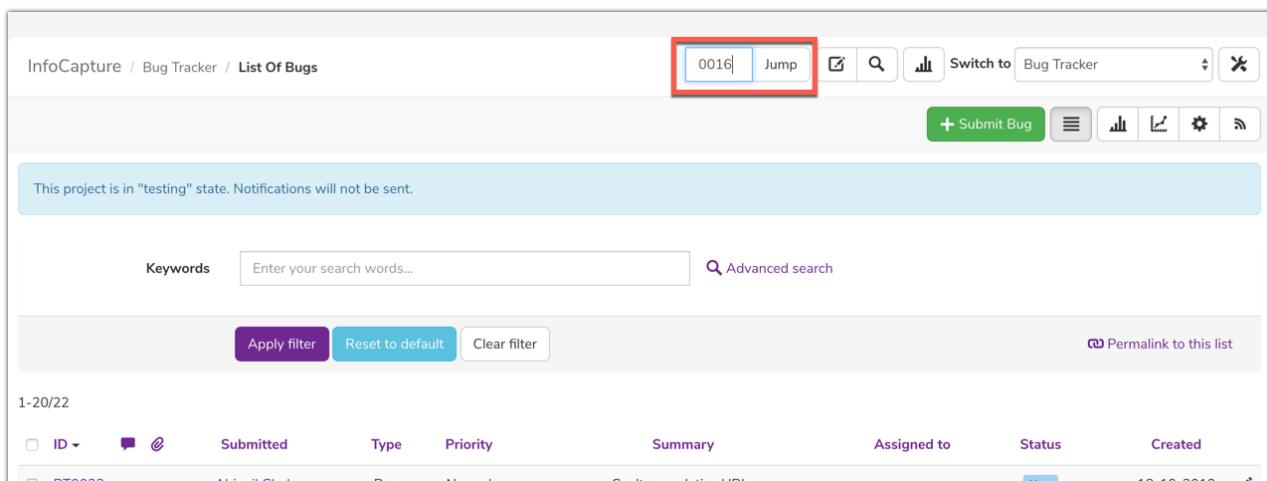
Take a look at the statuses in your project and try to group them by 'in progress' and 'closed/completed'. Then apply an archiving age to all statuses that are in the latter group. Once archived these tickets free up space in the 'list of tickets' from the front end for the new submissions.

## Searching for an Archived ticket

Once archiving age has been attributed to a status and the duration passes, tickets will auto archive and not be shown in the 'list of tickets' from the front end.

Instead, you will need to:

1. Perform a search of the ticket reference number from the front end, returning the ticket with an 'archived' label evident



The screenshot shows a 'List Of Bugs' page. At the top, there is a navigation bar with 'InfoCapture / Bug Tracker / List Of Bugs'. Below this is a search bar with '0016' in the input field and a 'Jump' button next to it, both of which are highlighted with a red box. To the right of the search bar are buttons for 'Submit Bug', 'Advanced search', and other project settings. A message at the top of the page states: 'This project is in "testing" state. Notifications will not be sent.' Below the search bar is a 'Keywords' input field and a 'Advanced search' button. At the bottom of the page are buttons for 'Apply filter', 'Reset to default', and 'Clear filter', and a link to 'Permalink to this list'. The main area shows a table of search results with the following data:

ID	Submitted	Type	Priority	Summary	Assigned to	Status	Created
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New	18-10-2019

InfoCapture / Bug Tracker / View Bug: BT0016

Ticket Jump    Switch to Bug Tracker

[Download ticket in PDF format](#) [Submit Bug](#)

ID	BT0016	Archived	Submitted by	Victor McLean
Status	Confirmed		Assigned	
Date of report	17-10-2019 03:37		Last modified	17-10-2019 03:37
SLA				
<a href="#">View Bug</a> <a href="#">FlowChart</a> <a href="#">Notes</a> <a href="#">Files</a> <a href="#">History</a> <a href="#">History diagram</a> <a href="#">All</a>				
<b>Bug Details</b> Type* Enhancement			Please provide as much information as possible, including steps to replicate the issue. Please use the file upload facility at the bottom of	

## 2. Use the advanced search function to 'include archived tickets'

(The checkbox to 'include archived tickets' appears when at least one status has been given an archiving age)

InfoCapture / Bug Tracker / List Of Bugs

Ticket Jump    Switch to Bug Tracker

[Submit Bug](#)

1 2 3 4

Keywords	<input type="text" value="Enter your search words..."/>	<a href="#">Advanced search</a>					
Created	<input type="text"/> to <input type="text"/>	Last modified	<input type="text"/> to <input type="text"/>				
Submitted by	<input type="checkbox"/> [ any ] <input type="checkbox"/> [ myself ] Abigail Clark Anne Wilkins ...	Assigned to	<input type="checkbox"/> [ any ] <input type="checkbox"/> [ not assigned ] Claire Bond Jacob Black ...				
Status	<input type="checkbox"/> [ any ] New Pending Reporter Feedback Pending Developer Feedback ...	Severity	<input type="checkbox"/> [ any ] Block Crash Major ...				
Priority	<input type="checkbox"/> [ any ] Urgent High Normal	<input checked="" type="checkbox"/> Include archived tickets					
<input type="checkbox"/> <a href="#">Apply filter</a> <a href="#">Reset to default</a> <a href="#">Clear filter</a>		<a href="#">Permalink to this list</a>					
1-20/22							
ID	Submitted	Type	Priority	Summary	Assigned to	Status	Created
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New	18-10-2019 04:38