



Infocapture report building





Creating a report - Start to finish

Please ensure your permissions settings are correct, this is covered [here](#).

Firstly you will need to identify the objective of the report, in this example, we will demonstrate a few.

Step 1: Select the form you want to run a report on

InfoCapture / All Reports / Infocapture report wizard

Ticket Jump    

Reporting Limits
Please note that reports should not include more than 60 columns.

1. **Source project** 2. Pre-filter options 3. Fields grouping 4. Viewable Fields 5. Post-filter options 6. Result sorting 7. Save

Project

Step 2: Pre-filter options

If you have a large number of tickets on a big form, pre-filters are necessary to make the data manageable, ahead of providing the data in the report it will ask you to define the filters. In this example, we will demonstrate 2 pre-filters.



- 1- A date range e.g. only show 'Bug tickets' submitted within a certain date range
- 2- Status priority - Also be able to filter by the urgency of the status



The result being *'We can see we had 5 high priority tickets submitted in the month of March'*

Here is how it will look on the front end of the report when you run it, without pre-filters, you will see all the data straight away.

Pre-filter options

Submitted From Date Not lower  

Submitted To Date Not greater  

Priority Is equal to  Urgent 

Comma (,) Semicolon (;)



To create these settings, you will need to follow these steps:

You will see at present there is just one 'Created' date field, the bottom arrow indicates where another can be added:

Reporting Limits

Please note that reports should not include more than 60 columns.

- 1. Source project
- 2. Pre-filter options
- 3. Fields grouping
- 4. Viewable Fields
- 5. Post-filter options
- 6. Result sorting
- 7. Save

ID	- not selected -		<input type="checkbox"/>	
ID in project	- not selected -		<input type="checkbox"/>	
Creator	- not selected -		<input type="checkbox"/>	
Assigned to	- not selected -		<input type="checkbox"/>	
Created	- not selected -		<input type="checkbox"/>	
Last modified	- not selected -		<input type="checkbox"/>	
Status	- not selected -	New	<input type="checkbox"/>	
Archived	- not selected -	<input type="checkbox"/>	<input type="checkbox"/>	
Traffic light	- not selected -		<input type="checkbox"/>	
Type	- not selected -	Bug	<input type="checkbox"/>	
Reproducibility	- not selected -	Always	<input type="checkbox"/>	
Severity	- not selected -	Block	<input type="checkbox"/>	
Priority	- not selected -	Urgent	<input type="checkbox"/>	
Summary	- not selected -		<input type="checkbox"/>	
Description	- not selected -		<input type="checkbox"/>	
Additional Information	- not selected -		<input type="checkbox"/>	
Browser	- not selected -	Chrome	<input type="checkbox"/>	

Additional settings

Add new field

- Choose -

Submit changes

Show count of grouped rows

Reset Back Next

If you select 'Created' here and 'Submit changes' you will see a second 'Created' box appear below the current one.

	1. Source project	2. Pre-filter options	3. Fields grouping	4. Viewable Fields	5. Post-filter options	6. Result sorting	7. Save
ID	- not selected -			<input type="checkbox"/>			
ID in project	- not selected -			<input type="checkbox"/>			
Creator	- not selected -			<input type="checkbox"/>			
Assigned to	- not selected -			<input type="checkbox"/>			
Created	Not lower			<input checked="" type="checkbox"/>	Submitted from date		
Created (N 2)	Not greater			<input checked="" type="checkbox"/>	Submitted to date		<input type="checkbox"/>

1. You can leave these as -not selected- or set them whatever you choose is how the default will appear when you run the report
2. If the date range will always be the same, you can enter the dates at this point but its likely you will want to enter custom ranges each time so leave this blank
3. **Checking here is what tells the report to include this item as a pre-filter.** When you check here, the final column opens;
4. This is where you name the prefilter, eg 'From' and 'To' like so, you must name it or an error will appear

InfoCapture / All Reports / Bug Tracker / **New test report**

Ticket Jump

Pre-filter options

From Is equal to 01-03-2020

To Is equal to

Submit Reset

***Please note!** When you click 'Run Wizard' again if you have changes to make, you will see in this section the check marks against these grouped items have been removed, you will need to re-do this every time you edit the report.*




Step 3: Field Grouping

Field grouping is helpful in the following scenario:

'I want to see a list of all ticket handlers we have managing tickets'

Without field grouping, this report would look something like the below image. You would need to try to count the individuals (without accidentally counting them twice from this list).

InfoCapture / All Reports / Bug Tracker / Copy of Bug assigned to

Ticket Jump    Switch

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 22 rows

ID	Assigned to
000180	Jacob Black
000181	Victor McLean
000182	Phil Lawrence
000183	Simon Walker
000184	Claire Bond
000294	Claire Bond
000295	Phil Lawrence
000296	Simon Walker




It's not particularly easy to review in this way, so if you check this field in field grouping:

1. Source project 2. Pre-filter options 3. Fields grouping 4. Viewable Fields 5. Post-filter options 6. Result sorting 7. Save

Is grouping field?	Field name
<input type="checkbox"/>	ID
<input type="checkbox"/>	ID in project
<input type="checkbox"/>	Creator
<input checked="" type="checkbox"/>	Assigned to
<input type="checkbox"/>	Created
<input type="checkbox"/>	Last modified
<input type="checkbox"/>	Status
<input type="checkbox"/>	Archived
<input type="checkbox"/>	Traffic light
<input type="checkbox"/>	Type
<input type="checkbox"/>	Reproducibility
<input type="checkbox"/>	Severity
<input type="checkbox"/>	Priority

The report will then look like this:

InfoCapture / All Reports / Bug Tracker / Copy of Bug assigned to

Ticket Jump    Switch

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 7 rows




Assigned to

Victor McLean
Jacob Black
Claire Bond
Phil Lawrence
Simon Walker
Rose Sharp


There is another nice addition that can be added here if your objective next is:


'I want to see how many tickets each of these ticket handlers are managing'

When you get to the next section 'Viewable fields' you will need to check this box at the bottom:

Description	<input type="checkbox"/>	<input type="text"/>	- not selected - 
Additional Information	<input type="checkbox"/>	<input type="text"/>	- not selected - 
Browser	<input type="checkbox"/>	<input type="text"/>	- not selected - 

Additional settings

Add new field  Submit changes

Show count of grouped rows 

Reset Back Next

Checking this box will make the data display like so:

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 7 rows

Assigned to	COUNT
	11
Victor McLean	1
Jacob Black	1
Claire Bond	2
Phil Lawrence	4
Simon Walker	2
Rose Sharp	1

Step 4: Viewable Fields

This section determines which fields in your form should be visible in the report.

Please note: The report can only handle a maximum of 60 columns, please bear this in mind when choosing which fields need to be visible, the fewer you have the better performance you will have on the report.
This is due to the current MySQL database limitation that cannot have more than 61 joins between tables.

Please also note that using field grouping means some further considerations must be given here, these are shown in yellow alert boxes:

Reporting Limits

Please note that reports should not include more than 60 columns.

1. Source project 2. Pre-filter options 3. Fields grouping 4. **Viewable Fields** 5. Post-filter options 6. Result sorting 7. Save

Warning: only fields having a grouping function selected can be viewable!

Warning: select grouping function for all or no fields!

Field name	View	View as	Grouping function	Dele
ID	<input type="checkbox"/>		- not selected -	
ID in project	<input type="checkbox"/>		- not selected -	
Creator	<input type="checkbox"/>		- not selected -	
Assigned to	<input checked="" type="checkbox"/>		grouped	
Created	<input type="checkbox"/>		- not selected -	
Last modified	<input type="checkbox"/>		- not selected -	
Status	<input type="checkbox"/>		- not selected -	
Archived	<input type="checkbox"/>		- not selected -	
Traffic light	<input type="checkbox"/>		- not selected -	
Type	<input type="checkbox"/>		- not selected -	
Reproducibility	<input type="checkbox"/>		- not selected -	
Severity	<input type="checkbox"/>		- not selected -	
Priority	<input type="checkbox"/>		- not selected -	
Summary	<input type="checkbox"/>		- not selected -	
Description	<input type="checkbox"/>		- not selected -	
Additional Information	<input type="checkbox"/>		- not selected -	
Browser	<input type="checkbox"/>		- not selected -	

Additional settings

Add new field

Submit changes

Show count of grouped rows

If you haven't got any grouping in place, you can simply check the fields you would like to appear.

Once checked the middle column will activate, here you can give the column a different heading, if you leave it blank it will stay as the current field name.

Step 5: Post Filter options

It's likely this section may not have options for you. Your choices in the previous section will determine what appears here.

Looking at the following example:

Form: Invoice request

'I want to see who managed the highest value invoice this year'

If you take a step back to the previous section, 'Viewable fields' you can see here we have grouped the field 'Assigned to' and lower down the page we also have said we want the 'Total' field to be visible, when we select this, we get the choice to select something about this field, whether it should show the 'MAX' or 'MIN' value.

Amount	<input type="checkbox"/>		- not selected -
Reason	<input type="checkbox"/>		- not selected -
Total	<input checked="" type="checkbox"/>		MAX
Invoice Number	<input type="checkbox"/>		- not selected -
Date Sent	<input type="checkbox"/>		- not selected -

If this is configured for a field in the 'Viewable fields' section it will appear in the 'Post-filter' section like so:

InfoCapture / All Reports / Infocapture report wizard Ticket Jump

Reporting Limits
Please note that reports should not include more than 60 columns.

1. Source project 2. Pre-filter options 3. Fields grouping 4. Viewable Fields 5. Post-filter options 6. Result sorting 7. Save

Field name	Condition	Value	Prompt for value	User parameter title
MAX (Total)	- not selected -		<input type="checkbox"/>	

Reset Back Next

It is up to you if you would like to further configure the following:

Condition: specify further details about this field (e.g. contains, is greater than, is less than)

Value: For the above condition

Prompt for Value: If this is checked, the two above options will appear on the report, asking you to configure the data ahead of showing the results. If you don't check this, the report will still run the prefilter, with whatever you have entered here at this point.

User parameter value: Give the pre-filter a different name (currently it would be MAX (Total))

Here is how the report looks when 'Prompt for value' is ticked:

InfoCapture / All Reports / Invoice Request / Invoice total Ticket Jump

Post-filter options

Maximum - not selected -

Submit Reset

Here is how it will look without 'Prompt for value' ticked, of all the tickets the ticket handlers managed, this report will show the one with the highest value next to the

ticket handlers name.

InfoCapture / All Reports / Invoice Request / Invoice total

Ticket Jump [Icons] Switch to Inv

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 6 rows

Assigned to	MAX (Total)
Claromentis Administrator	3050
Barclay Martin	1000
Robert Reith	2000
Sameer Arora	2355
Michael Christian	1125
Michael Hassman	1000

Step 6: Results sorting

Results sorting determines what way the data is organised, you can choose from three options, the top one will take priority.

Here is an example of how my data looks now:

InfoCapture / All Reports / Bug Tracker / Test again

Ticket Jump [Icons] Switch to Bug Tracker

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 22 rows

Submitter	Assigned to	Created	Last modified	Status	Type	Description
Claromentis Administrator		8 March 2020	8 March 2020	New	Bug	
Claromentis Administrator		8 March 2020	8 March 2020	New	Bug	It happened to me 3 times when I was traveling with my laptop last week
Claromentis Administrator		15 March 2020	15 March 2020	New	Bug	When uploading a document, the status message reads "Your document has been updated" It should read "Your document has been added"
Claromentis Administrator		28 March 2020	28 March 2020	New	Bug	

If I then configure it with the following guidance:

InfoCapture / All Reports / Infocapture report wizard Ticket Jump

Reporting Limits
Please note that reports should not include more than 60 columns.

1. Source project 2. Pre-filter options 3. Fields grouping 4. Viewable Fields 5. Post-filter options 6. **Result sorting** 7. Save

	Sorting field	Direction
Sorting field N 1	Created ▼	Ascending
Sorting field N 2	Assigned to ▼	Ascending
Sorting field N 3	- Choose - ▼	Ascending

Reset
Back
Next


You can see that the dates are now in chronological order:

InfoCapture / All Reports / Bug Tracker / Test again Ticket Jump Switch to Bug Tracker

CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 22 rows

Submitter	Assigned to	Created	Last modified	Status	Type	Description
Joshua Tucker	Phil Lawrence	2 March 2020	2 March 2020	Assigned	Bug	After sending an email, which was previously saved, it doesn't get removed from the draf
Anne Wilkins	Claire Bond	5 March 2020	5 March 2020	Pending Testing	Bug	When you preview .pdf file in IE9 the following message is displayed: SCRIPT5022: Error loading JSON file (OK,SyntaxError: Invalid character). Please check yo jquery.min.js, line 2 character 14725
Connor Chapman	Phil Lawrence	5 March 2020	5 March 2020	Resolved	Bug	There is a spelling error in one of the tooltips. Succesful > Successful
John Vance	Simon Walker	5 March 2020	5 March 2020	Assigned	Enhancement	The report wizard has 7 steps, which are currently titled "Step 1, Step 2.... Step 7". Can we p these. Suggested titles: Step 1: Choose project Step 2: Pre-filters Step 3: Grouping fields Step 4: Viewable fields Step 5: Post-filters Step 6: Results sorting



Step 7: Save

Once you have reached the final step and click save, you will then be able to title your report. It will then populate in your list of reports. You will be able to rename, edit, duplicate and delete the report at any time.

Hopefully, this guide proves helpful in getting to grips with producing reports! There are many options and possibilities to test and try. Please remember the size limitations for reports as 60 columns, try to use pre-filters to manage large amounts of data.