



## Advanced search in Infocapture

### Included in this article

- 1- What is advanced search and why is it helpful
- 2- How do you configure advanced search fields
- 3- How to preserve advanced search filters for future reference

### 1- What is advanced search and why is it helpful

When working on a frequently used form with many submitted tickets, advanced search enables you to filter these tickets into a more manageable list giving a view of the specific information you are looking for.

Advanced search in infocapture can be customised to each form depending on the fields you have used. Enabling you to filter by almost any field in the form. There are certain restrictions here, for example it would not be possible to filter by an open text field, as the filled contents will vary in every ticket. A select field or drop down where a pre-determined answer can be chosen would all work great.

Advanced search can be accessed here:

(1)

A screenshot of the Infocapture interface. At the top left is a search bar with the placeholder text "Enter your search words..." and a "Search" button. To the right of the search bar are two panels. The "Statistics" panel shows four categories: "All" (22), "Submitted by me" (5), "Assigned to me" (0), and "Open" (16). The "Options" panel contains three links: "+ Submit Bug", "List Of Bugs" (highlighted with a red arrow), and "Statistics". Below these panels is a table of tickets. The table has columns for ID, Submitted, Type, Priority, Summary, Assigned to, Status, and Created. The first four rows of the table are visible, showing tickets BT0022, BT0021, BT0020, and BT0019.

ID	Submitted	Type	Priority	Summary	Assigned to	Status	Created
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New	18-03-2020 11:38
BT0021	Claromentis Administrator	Bug	Low	Status message is incorrect		New	15-03-2020 12:45
BT0020	Claromentis Administrator	Enhancement	High	It would be good to be able to embed a gallery in the front end		Pending Reporter Feedback	28-03-2020 08:51
BT0019	Claromentis Administrator	Bug	Normal	The forms component sometimes takes a few seconds to load		New	28-03-2020 08:50

(2)

A screenshot of the Infocapture interface showing the search bar and filter options. The search bar has the placeholder text "Enter your search words...". To its right is a link labeled "Advanced search" with a magnifying glass icon, highlighted by a red arrow. Below the search bar are three buttons: "Apply filter", "Reset to default", and "Clear filter". To the right of these buttons is a link labeled "Permalink to this list". Below the buttons is a table of tickets, identical to the one in the previous screenshot.

ID	Submitted	Type	Priority	Summary	Assigned to	Status	Created
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New	18-03-2020 11:38
BT0021	Claromentis Administrator	Bug	Low	Status message is incorrect		New	15-03-2020 12:45
BT0020	Claromentis	Enhancement	High	It would be good to be able to embed a gallery in		Pending Reporter	28-03-2020

Keywords

Enter your search words...

Advanced search

Created

to

Last modified

to

Submitted by

[ any ]

[ myself ]

Abigail Clark

Anne Wilkins

Assigned to

[ any ]

[ not assigned ]

Claire Bond

Jacob Black

Status

[ any ]

New

Pending Reporter Feedback

Pending Developer Feedback

Severity

[ any ]

Block

Crash

Major

Priority

[ any ]

Urgent

High

Normal

Apply filter

Reset to default

Clear filter

Permalink to this list

2- How do you configure advanced search fields

Within your infocapture form, there is a setting called 'Searchable fields' shown here:

Admin / Infocapture / Bug Tracker / Searchable fields

Project options

Project Summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

Automatic changes

Workflow

Notification

Notifications

Default notification fields

List options

General list options

Tickets list columns

**Searchable fields**

Default search filter

Customisation

"Thank you" page

Custom messages

RSS feed configuration

Searchable fields

Choose which information users can filter by when using the Advanced Search from the list of submitted tickets.

Add field

Type

Add

Filter display

☒ Two columns

☐ Three columns

Field name	Symbolic name	Type	Hide
DATE CREATED	_created_		<input type="checkbox"/>
DATE LAST MODIFIED	_last_modified_		<input type="checkbox"/>
SUBMITTER	_reporter_		<input type="checkbox"/>
ASSIGNED TO	_assigned_		<input type="checkbox"/>
STATUS	_status_		<input type="checkbox"/>
Severity	severity	Select	<input type="checkbox"/>
Priority	priority	Select	<input type="checkbox"/>

Here you can select which fields from the form you would like to be able to search and filter by. You can also click, hold and drag them up or down to determine the order.

**Please note:** As mentioned above, only certain fields can be chosen here. Open text boxes/ document attachments/ signature fields would all not work. Fields, where a select item can be chosen, will work.

Please also know that in order for the check box 'Show archived tickets' to appear, you will need to enable archiving, there is an article all about this[here](#).

### 3- How to preserve advanced search filters for future reference

Often when accessing tickets, you may have a custom filter that is most suited to your interests, for example:

- I want to see all the tickets that are assigned to me and pending my action
- I need to share a link with management showing all the urgent tickets that are submitted daily
- I only want to see tickets submitted by the clients that I manage

It can be time-consuming entering in the advanced search filters every day just to see this specific view of the tickets you need.

The workaround for this is to use the 'Permalink' feature. Once you have entered in your optimum filter choices and hit apply filter, you can then click 'Permalink to this filter'. This will change the URL, if you copy and paste this URL and use it to access this list from now on, it will show a live, up to date view of any tickets that meet these criteria.

Here are the steps:

- (1) Choose the filter options you would like to see & click apply filter

Keywords  [Advanced search](#)

Created ☐  to

Submitted by   
  
 Abigail Clark  
 Anne Wilkins

Status   
 New  
 Pending Reporter Feedback  
 Pending Developer Feedback

Priority   
**Urgent**  
 High  
 Normal

Last modified ☐  to

Assigned to   
  
 Claire Bond  
 Jacob Black

Severity   
 Block  
 Crash  
 Major

[Apply filter](#) [Reset to default](#) [Clear filter](#) [Permalink to this list](#)

(2) When the list of filtered results appears, click 'Permalink to this list'

millie89.myintranet.com/forms/bugtracker/list?search\_string=&\_reporter\_%5B%5D=&\_assigned\_%5B%5D=&\_status\_%5B%5D=&severity%5B%5D=&priority%...

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InfoCapture / Bug Tracker / List Of Bugs

Ticket Jump Search Switch to Bug Tracker

+ Submit Bug

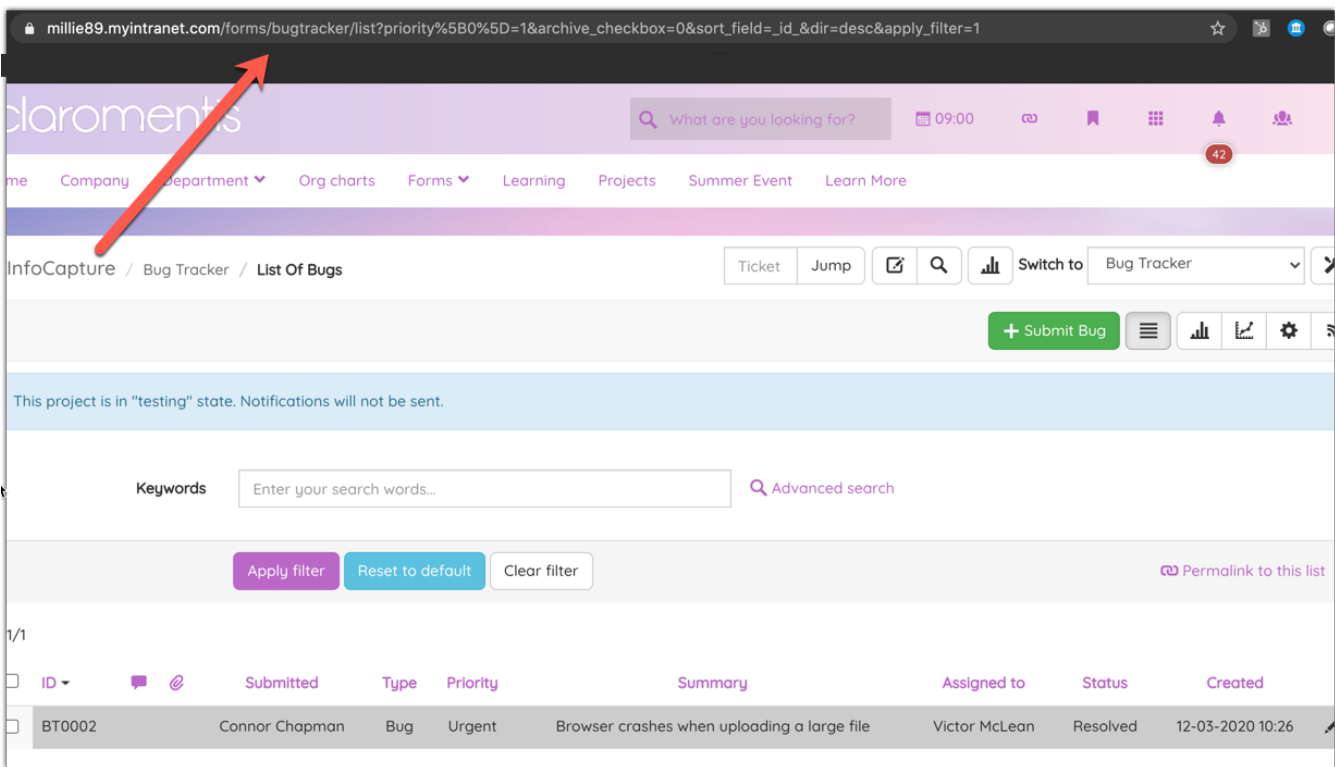
This project is in "testing" state. Notifications will not be sent.

Keywords  [Advanced search](#)

[Apply filter](#) [Reset to default](#) [Clear filter](#) [Permalink to this list](#)

ID	Submitted	Type	Priority	Summary	Assigned to	Status	Created
BT0002	Connor Chapman	Bug	Urgent	Browser crashes when uploading a large file	Victor McLean	Resolved	12-03-2020 10:26

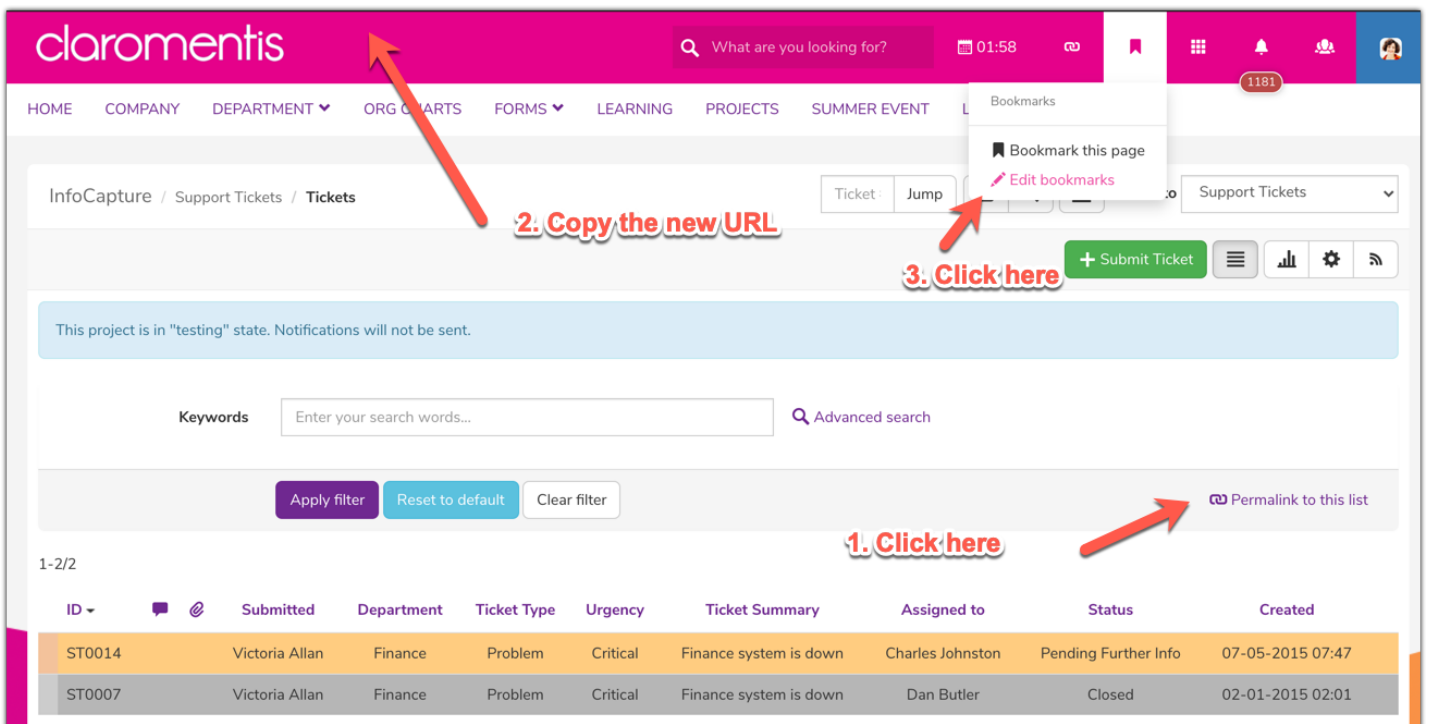
(3) When you click this button the URL will change to something more like the below:



**(4) Once you have the links, some ideas for sharing**

- Add a button to the homepage going directly to 'New tickets' for example
- Share the link with a team once, and tell them to access it whenever needed as it is live
- Add it to your saved bookmarks, here are the steps for this:

(i)



(ii)

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Bookmarks

	Title	Link	Open in new tab	Select
Add	<input type="text" value="Critical Support Tickets"/>	<input "="" type="text" value="/forms/tickets/list?urgency%5B0%5D=1&amp;archive_checkbox=0&amp;sort_field="/>	<input checked="" type="checkbox"/>	

Save

Delete selected

(iii)

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What are you looking for?

01:59

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**Good Evening Abigail Clark**  
Welcome to Claromentis

Communicate urgent news with our new Announcements app

Time until our company dinner  
0:00:00:00

Bookmarks

Critical Support Tickets

Bookmark this page

Edit bookmarks

Book a personal demo

Pricing

Announcements

Thank You

E-forms

Badges

Statistics

E-Learning