



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 advanced search interface in Infocapture. 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: "Statistics" and "Options". The "Statistics" panel shows four filter options: "All" (22), "Submitted by me" (5), "Assigned to me" (0), and "Open" (16). The "Options" panel shows three options: "+ Submit Bug", "List Of Bugs", and "Statistics". Below the search bar, the text "1-20/22" indicates the current page and total results. A table of tickets is displayed below, with columns for ID, Submitted, Type, Priority, Summary, Assigned to, and Status. The table contains four rows of ticket data.

ID	Submitted	Type	Priority	Summary	Assigned to	Status
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New
BT0021	Claromentis Administrator	Bug	Low	Status message is incorrect		New
BT0020	Claromentis Administrator	Enhancement	High	It would be good to be able to embed a gallery in the front end		Pending Reporter Feedback
BT0019	Claromentis Administrator	Bug	Normal	The forms component sometimes takes a few seconds to load		New

(2)

Keywords [Advanced search](#)

Apply filter Reset to default Clear filter

1-20/22

ID	Submitted	Type	Priority	Summary	Assigned to	Status
BT0022	Abigail Clark	Bug	Normal	Can't use relative URLs		New
BT0021	Claromentis Administrator	Bug	Low	Status message is incorrect		New
BT0020	Claromentis	Enhancement	High	It would be good to be able to embed a gallery in		Pending Reporter

(3)

Keywords [Advanced search](#)

Created

Submitted by
 [myself]
 Abigail Clark
 Anne Wilkins

Status
 New
 Pending Reporter Feedback
 Pending Developer Feedback

Priority
 Urgent
 High
 Normal

Last modified

Assigned to
 [not assigned]
 Claire Bond
 Jacob Black

Severity
 Block
 Crash
 Major


Apply filter Reset to default Clear filter

2- How do you configure advanced search fields

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

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
≡ DATE CREATED	_created_	
≡ DATE LAST MODIFIED	_last_modified_	
≡ SUBMITTER	_reporter_	
≡ ASSIGNED TO	_assigned_	
≡ STATUS	_status_	
≡ Severity	severity	Select
≡ Priority	priority	Select

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

The screenshot shows an advanced search interface with the following elements:

- Keywords:** A text input field with the placeholder "Enter your search words...".
- Advanced search:** A magnifying glass icon and the text "Advanced search".
- Created:** A checkbox, a date picker, and a "to" label followed by another date picker.
- Last modified:** A checkbox, a date picker, and a "to" label followed by another date picker.
- Submitted by:** A dropdown menu with options: "[any]", "[myself]", "Abigail Clark", and "Anne Wilkins".
- Assigned to:** A dropdown menu with options: "[any]", "[not assigned]", "Claire Bond", and "Jacob Black".
- Status:** A dropdown menu with options: "[any]", "New", "Pending Reporter Feedback", and "Pending Developer Feedback".
- Severity:** A dropdown menu with options: "[any]", "Block", "Crash", and "Major".
- Priority:** A dropdown menu with options: "[any]", "Urgent", "High", and "Normal". A red arrow points to the "Urgent" option.
- Buttons:** At the bottom, there are three buttons: "Apply filter" (with a red arrow pointing to it), "Reset to default", and "Clear filter".

(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

Perm

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

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

millie89.myintranet.com/forms/bugtracker/list?priority%5B%5D=1&archive_checkbox=0&sort_field=_id&dir=desc&apply_filter=1

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+ Submit Bug

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

(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)

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HOME COMPANY DEPARTMENT ▾ ORG CHARTS FORMS ▾ LEARNING PROJECTS SUMMER EVENT

InfoCapture / Support Tickets / Tickets

Bookmark this page Edit bookmarks

2. Copy the new URL

3. Click here

1. Click here

Keywords Enter your search words... Advanced search

Apply filter Reset to default Clear filter

1-2/2

ID	Submitted	Department	Ticket Type	Urgency	Ticket Summary	Assigned to	Status
ST0014	Victoria Allan	Finance	Problem	Critical	Finance system is down	Charles Johnston	Pending Further Info
ST0007	Victoria Allan	Finance	Problem	Critical	Finance system is down	Dan Butler	Closed

(ii)

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Bookmarks

Title	Link	Open in new ta
Critical Support Tickets	/forms/tickets/list?urgency%5B0%5D=1&archive_checkbox=0&sort_field=	<input checked="" type="checkbox"/>

Save

(iii)

- Bookmarks
- Critical Support Tickets
- Bookmark this page
- Edit bookmarks
- Book a personal demo



Good Evening **Abigail Clark**
Welcome to Claromentis



Pricing



Announcements



Thank You

Communicate urgent news with our new Announcements app

Time until our company dinner

0:00:00



E-forms