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)

(2)

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
- ⅗/1 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_		🚫
═ 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

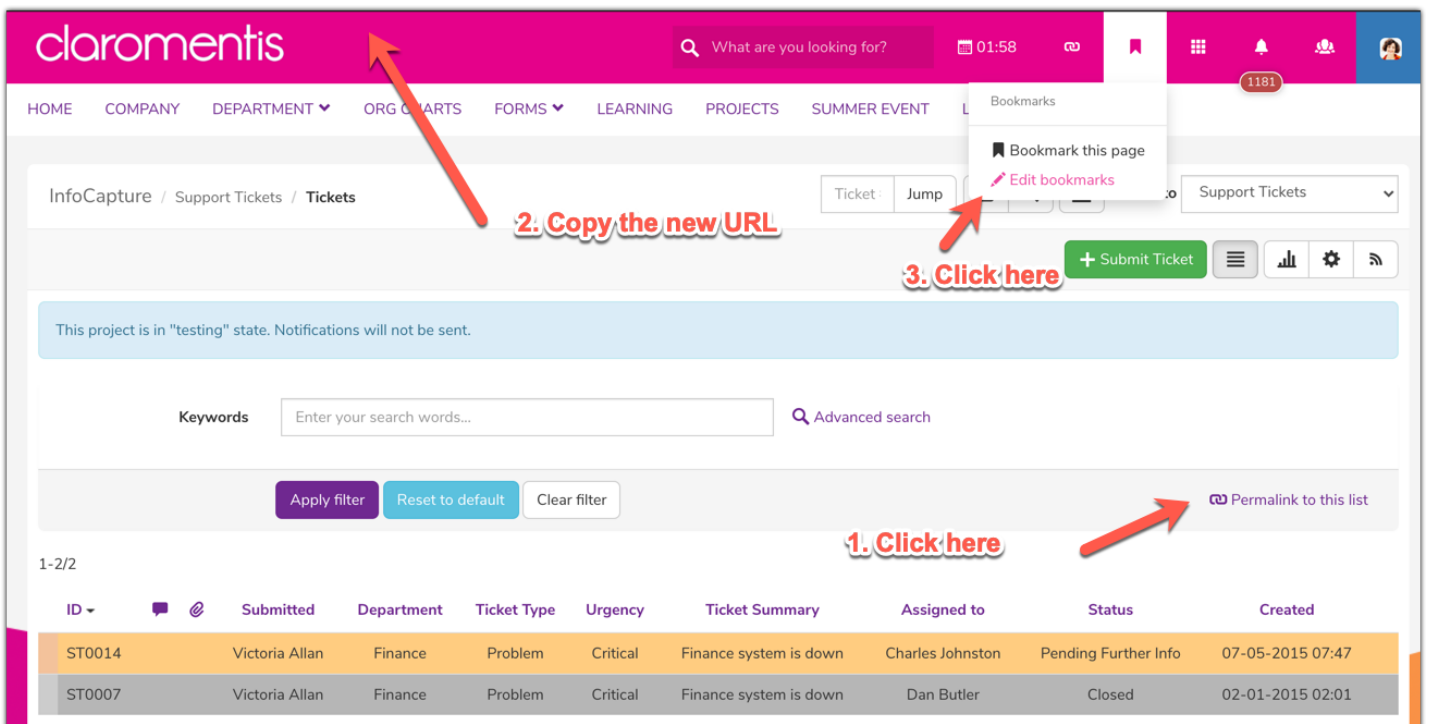**(2) When the list of filtered results appears, click 'Permalink to this list'**

(3) When you click this button the URL will change to something more like the below:
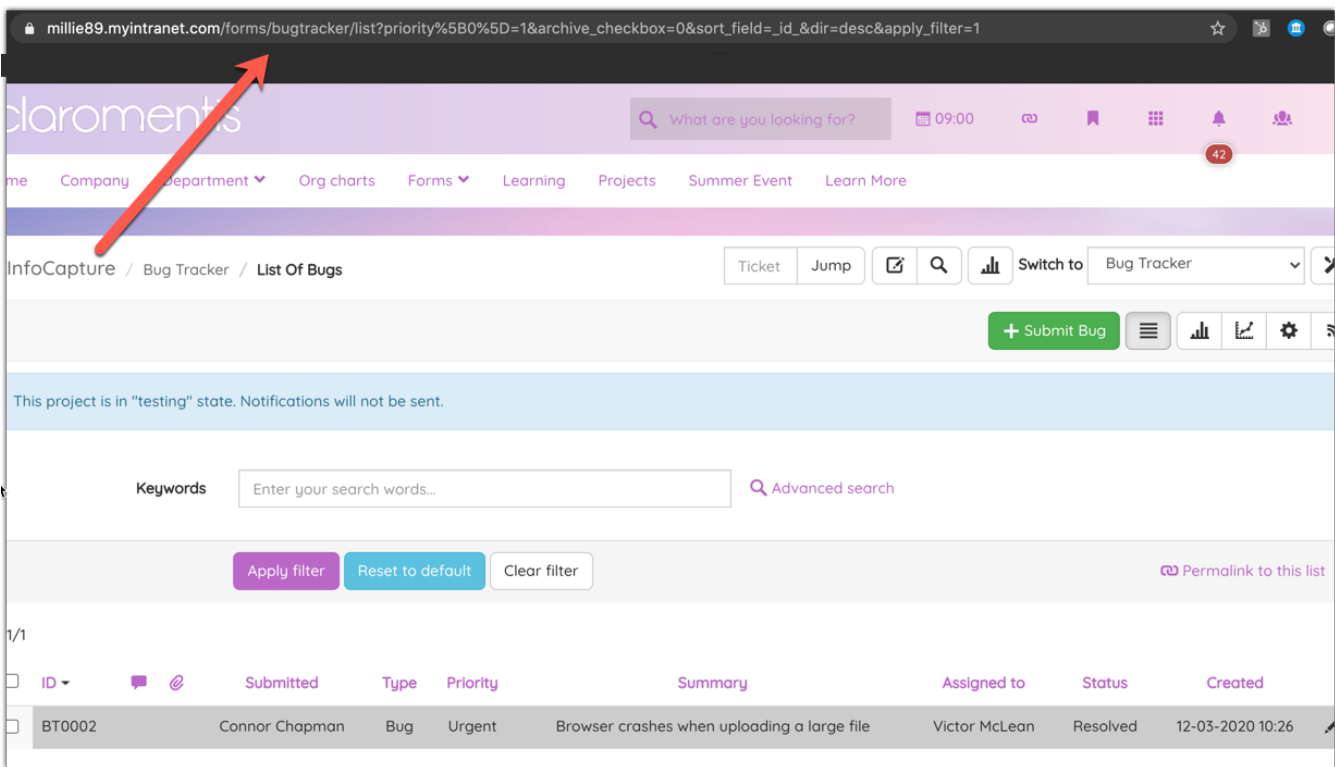
(4) Once you have the links, some ideas for sharing

- 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)

(iii)