



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)

All22

Submitted by me5

Assigned to me0

Open16

+ Submit Bug

List Of Bugs

Statistics

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 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

| <input type="checkbox"/> | ID ▾ | Submitted | Type | Priority | Summary | Assigned to | Status |
|--------------------------|--------|---------------------------|-------------|----------|---|-------------|------------------|
| <input type="checkbox"/> | BT0022 | Abigail Clark | Bug | Normal | Can't use relative URLs | | New |
| <input type="checkbox"/> | BT0021 | Claramentis Administrator | Bug | Low | Status message is incorrect | | New |
| <input type="checkbox"/> | BT0020 | Claramentis | Enhancement | High | It would be good to be able to embed a gallery in | | Pending Reporter |

(3)

Keywords
[Advanced search](#)

Created
☐

to

Submitted by

[any]
[myself]
Abigail Clark
Anne Wilkins

Status

[any]
New
Pending Reporter Feedback
Pending Developer Feedback

Priority

[any]
Urgent
High
Normal

Last modified
☐

to

Assigned to

[any]
[not assigned]
Claire Bond
Jacob Black

Severity


[any]
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..." and a magnifying glass icon.
- Advanced search:** A link icon and text label.
- Created:** A date range selector with a calendar icon, a "to" label, and another calendar icon.
- Last modified:** A date range selector with a calendar icon, a "to" label, and another calendar icon.
- 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" (highlighted in orange), "High", and "Normal". A red arrow points to this selection.
- Buttons:** At the bottom, there are three buttons: "Apply filter" (purple), "Reset to default" (blue), and "Clear filter" (white). A red arrow points to the "Apply filter" button.
- Permalink:** A link icon and text label at the bottom right.

(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%...

laromentis

What are you looking for? 08:58

Company Department Org charts Forms Learning Projects Summer Event Learn More

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 Enter your search words... 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%5B0%5D=1&archive_checkbox=0&sort_field=_id&dir=desc&apply_filter=1

laromentis

What are you looking for? 09:00

Company Department Org charts Forms Learning Projects Summer Event Learn More

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 Enter your search words... 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- |

(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)

The screenshot shows the Claromentis web application interface. The top navigation bar is pink with the logo and a search bar. Below it is a menu with links like HOME, COMPANY, DEPARTMENT, etc. The main content area shows a breadcrumb trail: InfoCapture / Support Tickets / Tickets. A red arrow points to the 'Tickets' link in the breadcrumb, with the annotation '1. Click here'. Another red arrow points to the 'Edit bookmarks' link in a dropdown menu, with the annotation '3. Click here'. A third red arrow points to the address bar, with the annotation '2. Copy the new URL'. The page also features a search bar, filter buttons, and a table of tickets.

| 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)

The screenshot shows the Claromentis web application interface for the Bookmarks section. The top navigation bar is pink with the logo and a search bar. Below it is a menu with links like HOME, COMPANY, DEPARTMENT, etc. The main content area shows a table with columns for Title, Link, and Open in new tab. The table has one row with the title 'Critical Support Tickets' and the link '/forms/tickets/list?urgency%5B0%5D=1&archive_checkbox=0&sort_field='. A red arrow points to the 'Save' button at the bottom right.

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

(iii)

claromentis

Q

What are you looking for?

01:59

HOME

COMPANY

DEPARTMENT ▾


ORG CHARTS

FORMS ▾

LEARNING

PROJECTS

SUMMER EVENT



Good Evening **Abigail Clark**

Welcome to Claromentis

Communicate urgent news with our new Announcements app

Pricing

Announcements

Thank You

Time until our company dinner

0:00:00:00

E-forms

Bookmarks

Critical Support Tickets

Bookmark this page

Edit bookmarks

Book a personal demo