



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)

Statistics

All 22

Submitted by me 5

Assigned to me 0

Open 16

Options

+ 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	Claromentis Administrator	Bug	Low	Status message is incorrect		New
<input type="checkbox"/>	BT0020	Claromentis	Enhancement	High	It would be good to be able to embed a gallery in		Pending Reporter

(3)

Keywords
[Advanced search](#)

Created

☐

to

Submitted by

[myself]
Abigail Clark
Anne Wilkins

Status

New
Pending Reporter Feedback
Pending Developer Feedback

Priority

Urgent
High
Normal

Last modified

☐

to

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 the 'Advanced search' interface of a bug tracker. It includes several filter categories: 'Keywords' (a text input), 'Created' (date range), 'Submitted by' (a dropdown menu with options like '[any]', '[myself]', 'Abigail Clark', 'Anne Wilkins'), 'Status' (a dropdown menu with options like '[any]', 'New', 'Pending Reporter Feedback', 'Pending Developer Feedback'), 'Priority' (a dropdown menu with options like '[any]', 'Urgent', 'High', 'Normal'), 'Last modified' (date range), 'Assigned to' (a dropdown menu with options like '[any]', '[not assigned]', 'Claire Bond', 'Jacob Black'), and 'Severity' (a dropdown menu with options like '[any]', 'Block', 'Crash', 'Major'). A red arrow points to the 'Urgent' option in the 'Priority' dropdown. Another red arrow points to the 'Apply filter' button at the bottom of the filter section. The 'Apply filter' button is highlighted in purple.

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

The screenshot shows the 'List Of Bugs' page in the bug tracker. The URL in the browser address bar is 'millie89.myintranet.com/forms/bugtracker/list?search_string=&_reporter_%5B%5D=&_assigned_%5B%5D=&_status_%5B%5D=&severity%5B%5D=&priority%...'. The page header includes the 'laromentis' logo and a search bar. The main content area shows a list of bugs. The first bug is 'BT0002' submitted by 'Connor Chapman', with a 'Bug' type, 'Urgent' priority, and a summary of 'Browser crashes when uploading a large file'. The bug is assigned to 'Victor McLean' and is in a 'Resolved' status. A red arrow points to the 'Permalink to this list' button at the bottom right of the filter section. The 'Permalink to this list' button is highlighted in purple.

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

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What are you looking for? 09:00

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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 Enter your search words... Advanced search

Apply filter Reset to default Clear filter

1/1

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

(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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What are you looking for? 01:58

HOME COMPANY DEPARTMENT Org charts FORMS Learning PROJECTS SUMMER EVENT

InfoCapture / Support Tickets / Tickets

Ticket Jump

+ Submit Ticket

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

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

2. Copy the new URL

3. Click here

1. Click here

(ii)

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01:59

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ORG CHARTS

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Bookmarks

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

Save

(iii)

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What are you looking for?

01:59

HOME

COMPANY

DEPARTMENT ▼

ORG CHARTS


FORMS ▼

LEARNING

PROJECTS

SUMMER EVENT

Bookmarks



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

Critical Support Tickets

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