

Testing InfoCapture forms

In this article, we are going to demonstrate the quickest and most effective way of testing InfoCapture forms.

This can be useful if you have a form that is live, would like to make changes but want to check the changes you are planning to make will have the desired effect and not break any logic.

It can also be helpful if you have made good progress developing a form but would like to test other functionality in a way that means you won't change the initial configuration.

Here are the steps:

1 - Go to the project that is live/ that you are working on:

A screenshot of the 'T-Shirt Order' project page in the InfoCapture interface. The page has a sidebar on the left with 'Project options' including 'Project Summary' (selected), 'Edit project properties', 'Project permissions', 'Statuses', 'Conditions', 'Field condition sets', 'Triggers', 'Behaviour', and 'Field visibility'. The main content area shows the project title 'T-Shirt Order' with a t-shirt icon and a '/forms/tshirt' link. Below this are buttons for 'View Form', 'Checkout form', and 'Revision History'. A red arrow points to the 'Export project' button at the bottom of the page. The page also contains descriptive text about the form's functionality and a link for more information.

2 - Export the project - depending on the requirements, you may not need to export the tickets too

Admin / Infocapture / T-Shirt Order / Export project

Project options

- Project Summary
- Edit project properties
- Project permissions
- Statuses
- Conditions
- Field condition sets


Export project

Comments to export file

☐ Export the latest version of the form (without tickets)

☐ Export all versions of the form (includes tickets)

Get export file



3 - Import the project here

Admin / Infocapture

Projects Rights to create public reports General Settings


Search

Project name	Codename	Project status	
Asset Register	asset_register	Testing	
Branch Manager Weekly Checklist	weekly	Testing	
Bug Tracker	bugtracker	Testing	
Change of Salary or Job Title authorisation		Testing	
Checkbox Test		Testing	
Demo Form	demo	Testing	
Employee Of The Month	eotm	Testing	
Event Management	events	Testing	
example		Testing	
Example form showing all field types	testform	Active	

+ Add a new project

Import project

Edit System Stylesheets



Admin / Infocapture / Import project


Import project

InfoCapture project data file

Choose file No file chosen

Browse Documents

Load import data



4 - Give it a different name

Admin / Infocapture / Import project

Import project

Loaded file InfoCapture Project - T-Shirt Order (24-Aug-2020).xml

Host of source data millie89plus-demo.myintranet.com

Data created 24-08-2020

Creator Claromentis Administrator

Comments

Forms number 1

Tickets number 0

Project name Imported "T-Shirt Order"

Project description

Users identifiers Delete (for new system)

Process import

5 - Ensure the form status is in 'Testing', this means no notifications will be sent (as this could cause confusion to users)

Admin / Infocapture / T-Shirt Order / Edit project properties

Edit project properties

Use these options to define the project's primary settings. From here the project can be renamed, enabled and disabled.


Project name T-Shirt Order

Describe its purpose

This text is for admin only and it won't be visible to the users.

Project status Testing

Project in Testing status means it's Active (visible to the users) without email notification being sent.



Please note, when the form is imported in the permissions section the roles exist, they are just not populated with users.

For example:

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

Additionally users can be granted additional rights beyond what their project role would ordinarily allow, just for tickets they have personally submitted and those assigned to them.

Project roles

Rights

Options

All

+ Add new project role

	Role name	Users		
<input type="checkbox"/>	Employee			
<input type="checkbox"/>	Admin			
<input type="checkbox"/>	Tech team			

Delete selected

Last modified on 7 December 2023 by [Hannah Door](#)

Created on 24 August 2020 by [Millie Hand](#)
Tags: [forms](#), [infocapture](#), [testing](#)