



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 system. The breadcrumb trail is 'Admin / Infocapture / T-Shirt Order'. The page title is 'T-Shirt Order' with a sub-path '/forms/tshirt' and a 'Testing' tag. A sidebar on the left lists 'Project options' including Project Summary, Edit project properties, Project permissions, Statures, Conditions, Field condition sets, Triggers, Behaviour, and Field visibility. The main content area shows a 'View Form' button, a 'Checkout form' button, and a 'Revision History' link. Below this, there is a paragraph of text explaining the form's purpose: 'Using this form, staff are able to request a company T-Shirt, selecting their size, choosing the colour and even adding customisations. If a member of staff requests a T-Shirt without customisations, the marketing team are able to place the order straight away. If a member of staff requests a T-Shirt with customisations, management will need to approve the customisations prior the marketing team placing the order. If customisations are rejected by management, the requester will be notified. For more information on this process, please see here.' At the bottom, there are three buttons: 'Get external form', 'Export project', and 'Export & Import from CSV'. A red arrow points to the 'Export project' button.

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

A screenshot of the 'Export project' dialog box. The breadcrumb trail is 'Admin / Infocapture / T-Shirt Order / Export project'. The page title is 'Export project'. There is a text area for 'Comments to export file'. Below this, there are two radio button options: 'Export the latest version of the form (without tickets)' (which is selected) and 'Export all versions of the form (includes tickets)'. At the bottom, there is a 'Get export file' button. A red arrow points to the 'Get export file' button.

3 - Import the project here

Admin / Infocapture

Projects Rights to create public reports General Settings

+ Add a new project

Import project

Edit System Stylesheets

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	

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 forms status is in 'Testing', this means no notifications will be sent (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

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 25 August 2020 by Mhairi Hutton

Created on 24 August 2020 by Millie Hand

Tags: forms, infocapture, testing