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:

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

Admin / Infocapture / T-Shirt Order / Export project

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

Project options

🏠 Project Summary

✏️ Edit project properties

🔑 Project permissions

🗄️ Statuses

Conditions

▭ Field condition sets

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

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

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

For example:

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			
☐	Employee			✎	⬇
☐	Admin			✎	⬆⬇
☐	Tech team			✎	⬆

Delete selected

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