How the 'Open Items' Component Works

Introduction

The Open Items component generates a list of InfoCapture tickets that require action, defined as 'In Progress'.

This can be set by administrators to populate with tickets from single, multiple or all active forms.

The component can be set to populate based on different perspectives e.g. 'assigned to me', 'reported by me' or 'all tickets'.

Settings can be tweaked to best fit your requirement and provide a snapshot overview for those who interact with the form to work from.

Links within the component lead directly to the correct ticket location in the corresponding Infocapture project.

This speeds up user experience as they do not have to navigate to the application and form directly, they can do so from the component.

To set up a form ready for the component the steps below are required:

1. Decide on status groupings and give them labels

2. Sort labels into tickets defined as 'In Progress' or 'Completed'

Once the above is configured, the component settings can be chosen and tickets displayed

Example scenario

An Infocapture form for Stock requests is managed by the Logistics department of a company within their Intranet.

They wish to set up a quick reference of newly submitted tickets as well as those that still have interactions in the workflow to take place for the team to work from.

This will be on their departmental page, giving an overview of open tickets for the whole team to stay on top of,

even if a user is not assigned to a ticket themselves.

Required configuration on the admin side of the form

- Status tab

To prepare a form for the Open Items component statuses need to be grouped under labels based on their logical purpose in the form.

These labels are what will display per ticket in the component as an indication of its status.

Heading to Admin > InfoCapture > Stock Requests > Statuses will reveal the location where this is configured.

- The statuses currently set up in this form are highlighted in the red box.
- The 'Status group' area highlighted in green is where statuses can be grouped.

- Grouping statuses logically

The Stock Request form used in this example has 5 statuses.

The first task really is to decide how best to group the statuses or ascertain if they work better separately.

Next a label will be attributed that promotes the kind of tickets within the group and determines whether

they populate the Open Items component. i.e. either 'In Progress' (appears in component) or 'Completed' (will not appear)
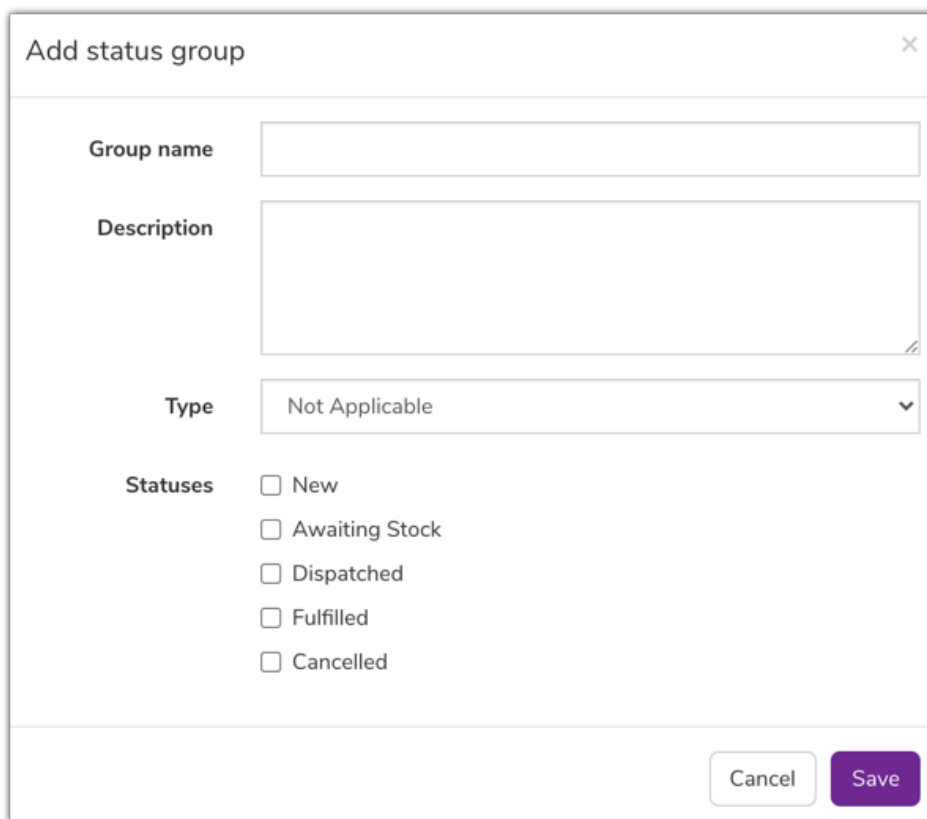
In the Stock Request form example:

- The status of 'New' denotes a newly submitted ticket and doesn't fit in with the other statuses so should stand alone and retain its label.
- Whereas 'Awaiting Stock' and 'Dispatched' are both statuses where the ticket will continue to be interacted with. These statuses suit being grouped together with a label like 'In progress' or 'Ongoing'.
- 'Fulfilled' and 'Cancelled' are both statuses where the ticket workflow has reached an end, its unlikely either of these statuses will be changed again. These two statuses could be grouped together and labelled as 'Closed'.
  - Alternatively it could be decided to separate out these statuses instead. 'Fulfilled' could be 'Confirmed' and 'Cancelled' could be 'Closed'.

Label titles for statuses are arbitrary and can be called whatever is most appropriate for your business, taking the context of the form into consideration.

- Sorting and creating chosen labels in a form

Once the general groupings have been decided and a label is chosen, they can be set up in the Status Groups area.

Clicking the green 'Add new group' button brings up the screen below:

Here we are able to enter the decided group label, choose which statuses will be included and what 'Type' the label is i.e. is it considered 'In Progress' and populate the component.

The 'Type' field gives two options - 'In Progress' or 'Completed':

- Looking at the 5 statuses in the Stock Request form overall has allowed groupings to be decided and labels attributed to each group.
- Based on each group they will logically fit into 'In Progress' or 'Completed'

In the Stock Requests example'

- New' tickets have been labelled 'New' and this status group can be considered *'In Progress'*.
- 'Awaiting Stock' and 'Dispatched' were labelled as 'In Progress' and this group is also considered to still be *'In Progress'*
- 'Fulfilled' and 'Cancelled' were labelled as 'Closed' and this group is considered to be *'Completed'*.

This is where you can be creative and change the set up dependent on your needs.

Maybe there is a department that deals with all 'Cancelled' orders and calls these customers for feedback. If they did need to see tickets in this status in the Open Items component from the front end, then 'Cancelled' could be given its own label and be set to 'In Progress' instead, unlike in this example.
It really is up to you how you wish to group statuses to best fit your form and the needs of your users.

Based on these decisions for labels the group for 'New' in this example can be entered as below:

Clicking 'Save' to update, the new status group appears listed with associated information e.g. a description if given and the number of statuses included in this group.

The remaining status groups for the Stock Request form can be added in the same way.

'In Progress':

'Closed':

Updated list in the Status Groups area:

Status Group

Status groups can be used to group multiple statuses together for dashboard pages component. For instance, 'New' and 'In Progress' can be part of status group: 'Open tickets'.

+ Add new group

Group id	Group name	Description	Type	Statuses count	
47	New	Newly submitted tickets	In Progress	1	✏️ 🗑️
48	In Progress	Tickets that are Awaiting Stock or Dispatched	In Progress	2	✏️ 🗑️
49	Closed	Tickets that have been Fulfilled or Cancelled	Completed	2	✏️ 🗑️

Now that the status groups and labels have been created, all that is left to do is configure the Open Items component itself.
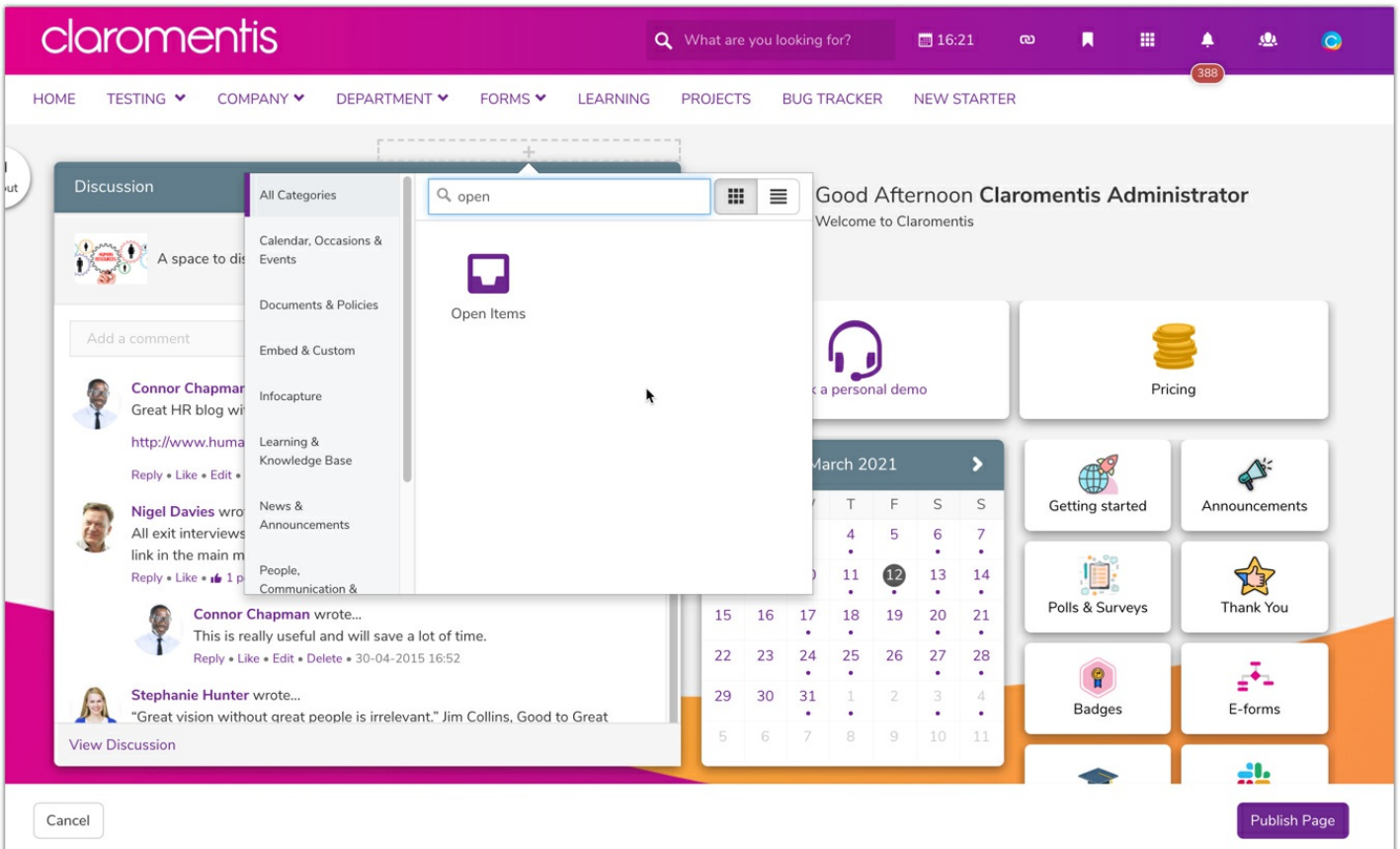
Front end configuration

In this example, the Open Items component is going to placed on a page that only the Logistics team have access to.

This will allow them to view and interact with the component as necessary to manage their Stock Request ticket list.

Where the component is placed in your Intranet will depend on your own requirements, and placement should ensure users that have view rights to tickets can access it.

- Adding the component to a page

When editing a page, select the component from the list as shown below.

Click to add this to the page and the component settings will open up.

By default 'All active projects' will display (by no selection being made) but this can be changed to a single form or multiple, by selecting them from the dropdown.

Please note: Users that can view the component will only see tickets for forms they have permissions to see. If this is empty, please check the effected user has permissions to the form that has been configured to display.
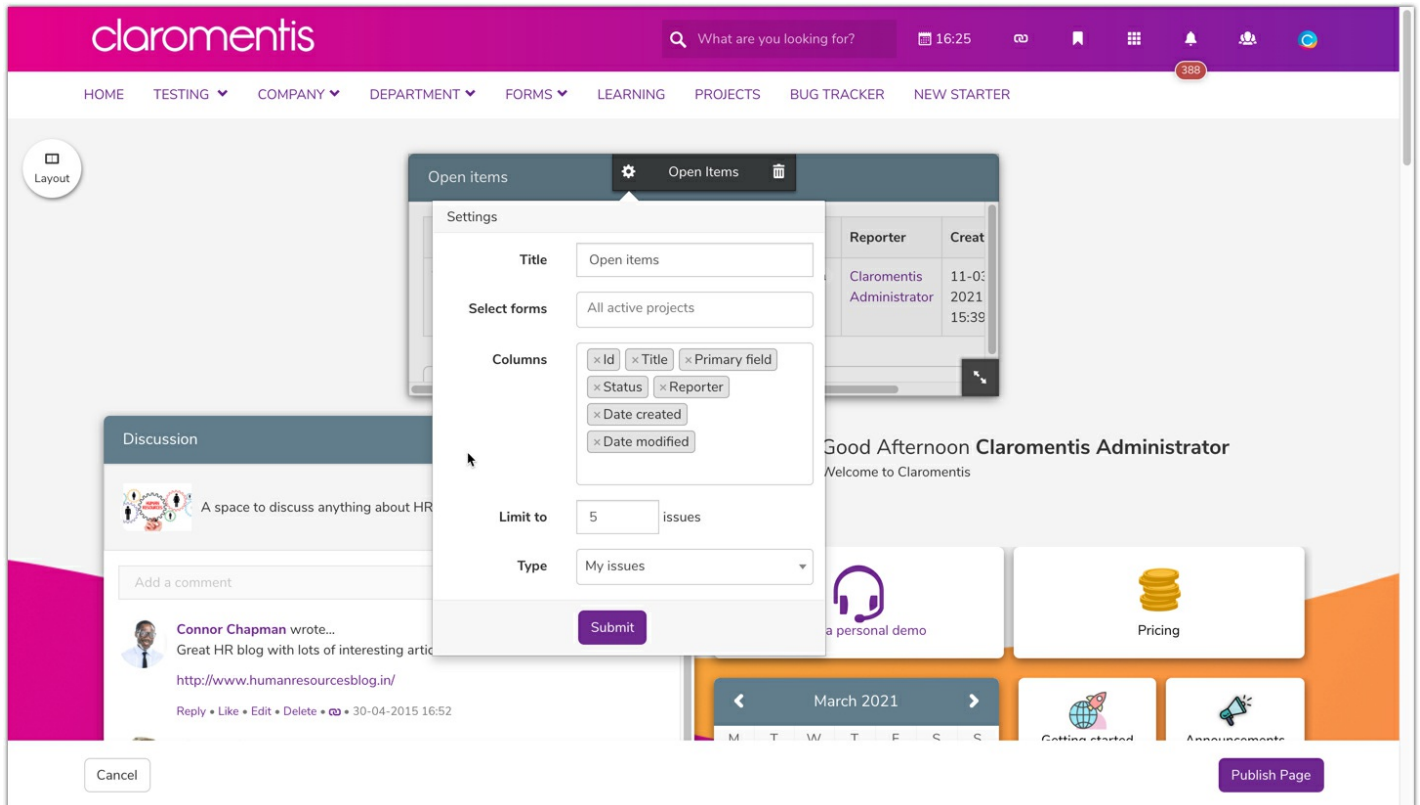
Different columns can be selected to pull through from the forms to change the information shown about the tickets.

A limit can be applied to restrict the number of tickets that will populate (max.100 tickets) When the component is resized, a scroll bar appears for use where more tickets are populating than the component size allows.

The 'Type' field is where the perspective of the component can be set and again the best option for this will depend on your requirement.

- Difference between 'Types'

An administrator can decide whether the component is filtered by an individual user perspective or not.

Please note: Forms require status groups set up and groups defined as 'In Progress' to populate the component. If no tickets are populating when expected, check that the groups and labels have been set up in your form to match your expectation.
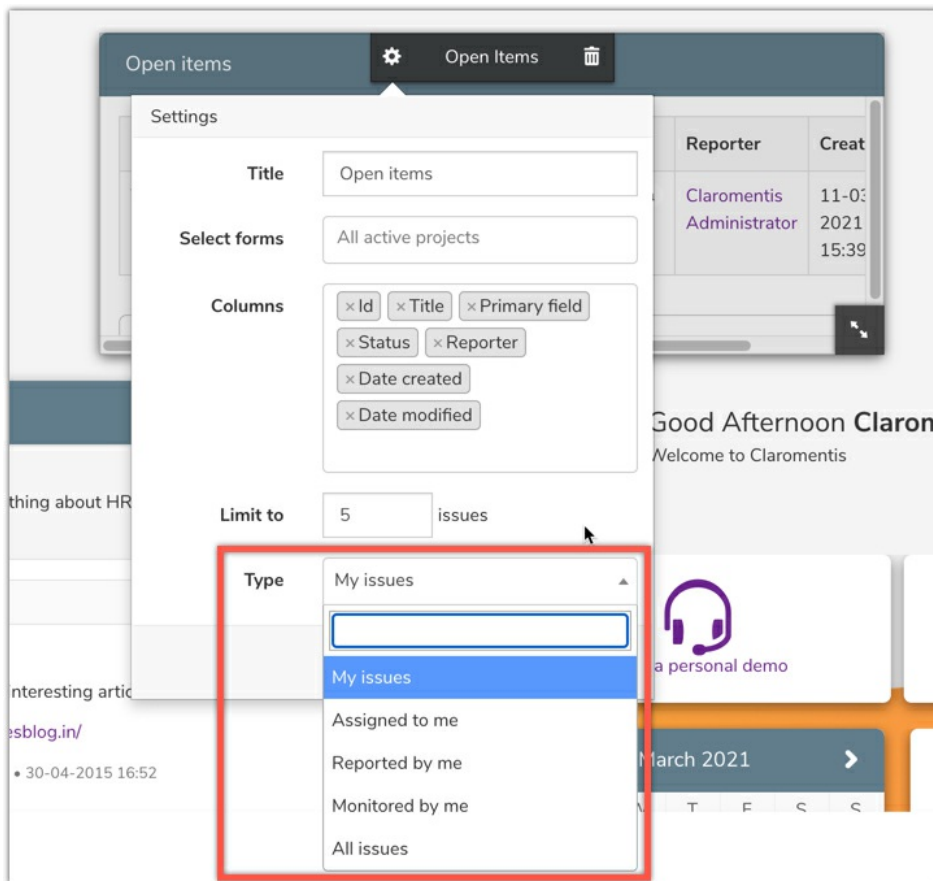
- My Issues

Tickets labelled as 'In Progress' will populate when they are assigned to or submitted by the user.

- Assigned to me

Tickets labelled as 'In Progress will populate when they are assigned to the user.

- Reported by me

Tickets labelled as 'In Progress' will populate when they were submitted by the user.

- Monitored by me

Tickets labelled as 'In Progress' will populate when they are being monitored by the user.

- All Issues

Tickets labelled as 'In Progress' across all forms chosen to display will populate with no filtering by user perspective.

Subsequently, the 'Type' that will be set for the component depends on your expectation for who will be using it.

In the 'Stock Request' example, the logistics team need to view all requests across the project that are 'In Progress' so they can keep an eye on new submissions as well as those that have been handled but await a further status change.

- As 'New' status tickets won't be assigned, the component can be set to 'Type - All Issues' to generate this list.
- Some 'Awaiting stock' or 'Dispatched' tickets will be assigned to different users, but using 'All issues' allows these to be viewable by the whole team.

## - Example scenario Open Items component populating


- Using the component

The logistics team are able to use the component to gain a snapshot overview of all 'In progress' tickets and click into them directly without having to go to the InfoCapture application to interact.

Any changes made to 'In progress' tickets by other users are reflected in the labels displaying in the component.
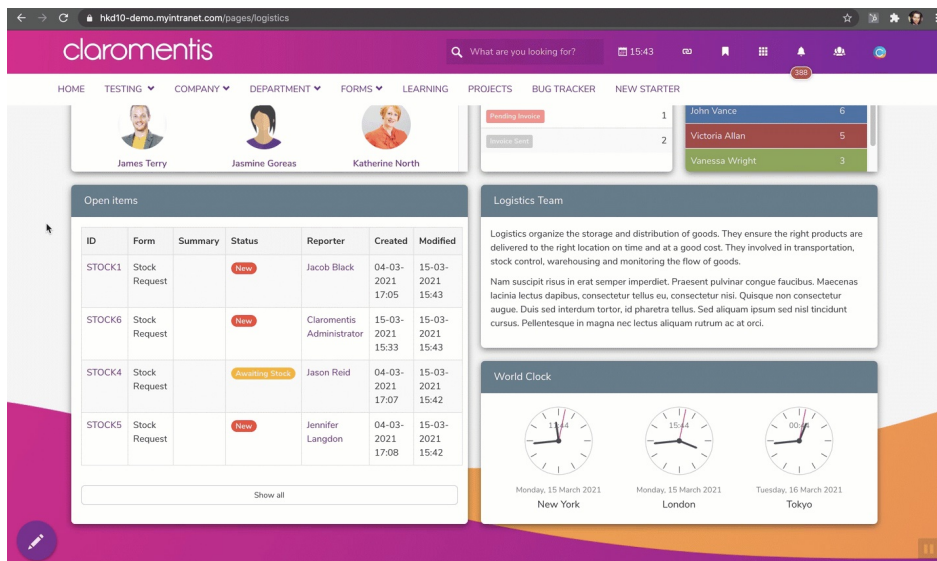
Any update to 'In Progress' tickets will be shown in the component until those tickets enter a 'Completed' status

and no longer appear.
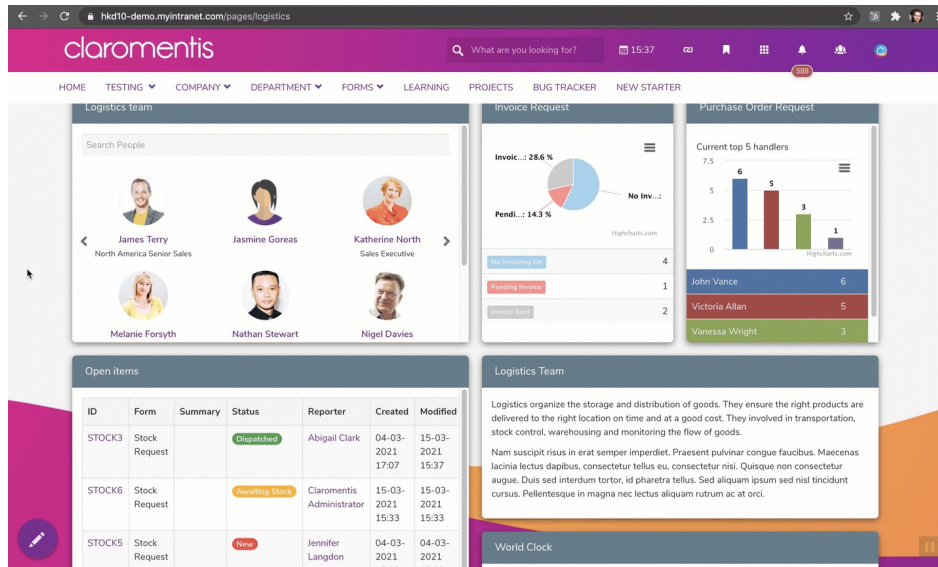
- Making changes

Further modifications to the status group structure or labels can be made at any time by administrators of InfoCapture forms.

In this way future changes within the forms themselves can be reflected in the status groups/labels to ensure the component experience is cohesive and current.

Any Open Items components set to populate from those forms will update to reflect any changes once saved.

A completely custom overview of forms and tickets that need to be dealt with can be created to best fit an audience or fulfil a certain purpose and be maintained over time.

If you have any questions about the Open Items component or its configuration not answered by this guide please submit a support ticket

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