



InfoCapture scenario: Auto-populate metadata to IC tickets

Introduction

In InfoCapture, metadata from the People application can be pulled through when submitting tickets.

The submitter's information will auto-populate so they are not required to manually enter details (i.e. Name, Job Title, Phone extension etc.)

This will not only save time but will also ensure there are no data entry errors.

It's important to note that only the ticket submitter's information can be configured to auto-populate. It will not be possible to have another user's details auto-populate in IC fields.

Pre-requisite

User information must exist in the user's profile in order for information to be pulled through.

User Profile Fields can be configured via Admin > People.

For more information on People settings, [click here](#).

Creating the field

1. To start, add a 'String' type field in 'Text' format to your InfoCapture form.

In this example, the field has been set up as a 'Medium string' type.

Fields properties

Properties Style Constraints

Name

Symbolic name [Edit](#)

Optional Hint

Type

String format

Default value

Use existing variables

Required
 Disabled
 Reload form on changing

[Save](#) [Delete](#)

2. The key step will now be to define the **Default Value**. The default value should be set with an expression that corresponds to the people field.

You can manually enter the expression or simply use the menu drop-down to select the relevant field.

Fields properties

Properties Style Constraints

Name

Symbolic name [Edit](#)

Optional Hint

Type

String format

Default value

- {user:id}
- {user:intranetuser}
- {user:username}
- {user:password}
- {user:firstname}
- {user:surname}
- {user:user_code}
- {user:company}
- {user:job_title}
- {user:emailad}

Please note: If the expression is missing from the drop-down list, head back to the People application to ensure the field is configured correctly and selectable as an option.

3. Once the expressions have been defined, select 'Save' to apply this to your field.

In this example, expressions for First name & Surname have been selected.

Fields properties
✕

Properties
Style
Constraints

Name

Symbolic name Edit

Optional Hint

Type ▼

String format ▼

Default value

Use existing variables

Required
 Disabled
 Reload form on changing

Save
Delete

To further prevent users from making errors and ensure the information pulling through is from user profiles only, you can set the field to 'Disabled.' When submitting a ticket, the field will be greyed out and uneditable, but the information from the profile will be visible.

Submitting tickets

Once the field has been applied, users with permissions can submit tickets as usual.

When tickets are submitted, the field will auto-populate with the user's first name & surname as entered in their profile.

User-profile:

Admin / People Control Panel / Edit user info

Edit user information
Role
Group
Org chart
Other settings

First name*

Surname*

IC ticket:

Ticket Jump 

* - required fields

Name*

Please note: If user information does not populate, head back to the People application to ensure the field is not empty in user-profiles and information is available in the field.

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