



InfoCapture scenario: Creating additional notification recipients

Introduction

In our Discover tickets, you may have noticed the **Additional Notification Recipients** fields where additional users can be notified about a ticket via email.

The Additional Notification Recipients allows you to:

- (a) Select the number of additional notification recipients
- (b) Enter the email address(es) a notification should be sent to
- (c) Select an existing trigger(s) for when these users should be notified.

Using field visibility, we can make the corresponding Additional Notification Recipients fields appear when the option is enabled.

This article will provide instructions on how you can configure this same feature in your own InfoCapture forms.

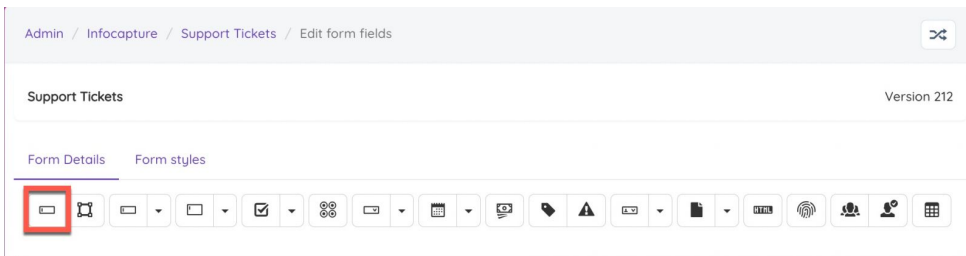
A screenshot of an InfoCapture form. At the top, there is a section titled 'Additional Notification Recipients' with a question mark icon and a checkbox. Below this, there is a section titled 'Internal Tracking'. Under 'Internal Tracking', there is a 'Ticket Owner' field with a question mark icon, a 'Select user' dropdown menu, and a 'Browse' button. Below that, there is a 'Documentation required' checkbox. At the bottom, there is a 'Jira' field with a question mark icon and a text input field.

For this scenario, we will allow for up to 3 additional users to be notified of the ticket.

Create form fields

To get started, there are three different types of fields that need to be added to your form.

From the Project Summary tab, check out the form to add the new fields.



1. Checkbox type field with 'Reload form on changing' option.

Fields properties

Properties Style

Name Additional Notification Recipients

Symbolic name other_recipients Edit

Optional Hint Please tick this checkbox if you wish to include other membe

Type Checkbox

Default value ☐

☐ Required

☐ Disabled

☒ Reload form on changing

Save Delete

Users will check this field if they would like to add additional notification recipients.

Reminder: The 'Reload form on changing' option will need to be enabled when adding this field. This feature will ensure the form refreshes mid-submission allowing it to check for any field rules attached to this field.

2. Radio type field with 'Reload form on changing' option.

Fields properties

Properties Style Constraints

Name How Many?

Symbolic name how_many Edit

Optional Hint

Type Radio

Values 1,#1
2,#2
3,#3

Default value ☒ 1 ☐ 2 ☐ 3

☐ No default value

☐ Required

☐ Disabled

☒ Reload form on changing

Save Delete

Users will use this field to specify the number of additional notification recipients.

Add the 'Reload form on changing' option for this field too.

3. String (Medium) type fields in Email format.

Fields properties

Properties

Style

Constraints

Name

Email Address

Symbolic name

email_address_1

Edit

Optional Hint

Type

Medium string

String format

Email

Default value

f

Use existing variables

☐ Required

☐ Disabled

☐ Reload form on changing

Save

Delete

Users will enter the email address in these fields of additional notification recipients.

Reminder: Each email field that is created will need to have a unique symbolic name.

In this example, there will an option to choose up to three additional notification recipients. Once all fields are created, it should appear similar to the below setup:

?

Additional

☐

Notification Recipients

How Many?

☒ 1

☐ 2

☐ 3

Email Address

Email Address

Email Address

Create condition sets

Next, you will need to create a field condition for the Checkbox field and Radio field. Define the rules for each field to match the below screenshots.

You will also notice that condition sets Default (Always) and Default (Being reported) already exist in your form. These are hard-coded fields that will be available in all InfoCapture forms and will be used in a later stage of this guide.

Field condition sets

Set true or false statement based on whether or not a condition is currently being met within your form.

Field condition sets are used in four places: 'Field visibility', 'Workflow', 'SLAs', and sometimes in 'Triggers'. These four functions are dependant upon conditions being met, which are defined here. Two conditions are included by default with new projects: 'Default (always)' is a condition that is always being met. This is useful for field visibility. 'Default (being reported)' is a condition that is met only while the user is submitting the form.

+ Add new condition set

Name / Order #	Field conditions	Use for fields rights	Use for workflow	Use for SLA	
Default (Always)		Yes	Yes	Yes	
Default (Being reported)	Being reported	Yes	Yes	Yes	

1. Condition for checkbox type field with 'Use for field rights' option:

Admin / Infocapture / Project properties / Field condition sets / Edit fields conditions set

Support Tickets

Properties of Field condition set

Name Additional Notification Recipients = Yes

☒ Use for fields rights

☐ Use for workflow

☐ Use for SLA

Field Conditions	Name	Type	Value
<input checked="" type="checkbox"/>	Additional Notification Recipients	Checkbox	<input checked="" type="checkbox"/>
<input type="checkbox"/>	How Many?	Radio	1 2 3
<input type="checkbox"/>	Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="checkbox"/> >= <input type="checkbox"/> <> <input type="checkbox"/> <=
<input type="checkbox"/>	Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="checkbox"/> >= <input type="checkbox"/> <> <input type="checkbox"/> <=
<input type="checkbox"/>	Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="checkbox"/> >= <input type="checkbox"/> <> <input type="checkbox"/> <=

Trigger ☐ Create a trigger for this condition (the trigger will have the name as this condition set)

Save

Add a copy of the rule

The above settings indicate that this condition will be met only when the Additional Notification Recipients checkbox is ticked. The condition set will not apply when the checkbox is left un-ticked.

2. Condition for radio type fields with 'Use for field rights' option:

Support Tickets

Properties of Field condition set

Name

☒ Use for fields rights

☐ Use for workflow

☐ Use for SLA

Field Conditions	Name	Type	Value
	<input checked="" type="checkbox"/> Additional Notification Recipients	Checkbox	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> How Many?	Radio	<div>1</div> <div>2</div> <div>3</div>
<input type="checkbox"/> Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="text"/> <input type="checkbox"/> >= <input type="text"/> <input type="checkbox"/> <> <input type="text"/> <input type="checkbox"/> <= <input type="text"/>	
<input type="checkbox"/> Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="text"/> <input type="checkbox"/> >= <input type="text"/> <input type="checkbox"/> <> <input type="text"/> <input type="checkbox"/> <= <input type="text"/>	
<input type="checkbox"/> Email Address	Medium string [Email]	<input type="checkbox"/> == <input type="text"/> <input type="checkbox"/> >= <input type="text"/> <input type="checkbox"/> <> <input type="text"/> <input type="checkbox"/> <= <input type="text"/>	





Trigger ☐ Create a trigger for this condition (the trigger will have the name as this condition set)



The above settings indicate that this condition will be met only when the Additional Notification Recipients checkbox is ticked AND when the corresponding number is selected.

Please note: Separate condition sets for each field will need to be created so that the relevant condition set is applied when the corresponding number is selected.

You should end up with a total of 4 new condition sets that correspond to the Checkbox field and each of the Radio fields:

<input checked="" type="checkbox"/> Additional Notification Recipients = Yes	Additional Notification Recipients == '1'	Yes	
<input checked="" type="checkbox"/> Number Of Additional Notification Recipients = 1	How Many? IN (1, 2, 3) Additional Notification Recipients == '1'	Yes	
<input checked="" type="checkbox"/> Number Of Additional Notification Recipients = 2	How Many? IN (2, 3) Additional Notification Recipients == '1'	Yes	
<input checked="" type="checkbox"/> Number Of Additional Notification Recipients = 3	How Many? IN (3) Additional Notification Recipients == '1'	Yes	

For more information on condition sets, please refer to our guide [here](#).

Configure field visibility

Now you can set up your field visibility rules for each of the condition sets by creating field groups.

This stage is needed in order to allow the corresponding number of fields to appear when the Additional Notification Recipient option is enabled.


Field visibility

Define whether your form's fields should show or hide depending on whether or not your conditions have been met.

This is dependent on 'Field condition sets' having first been added. The second action must be to add the fields you wish to control into their own group, under 'Manage Groups'.
Conditions are read through like a book, left to right and line by line, in the event of a contradiction then the last read condition takes priority. Field visibility allow you to define whether your form's fields should show or hide, depending on whether or not your conditions have been met.
For example, you may set part of your form to always allow itself to be shown, unless the condition is met that the status is currently 'Awaiting Approval', when it will hide itself. This would be setup with two lines like so:
First line: Default (Always) - Allow view and edit to all roles
Second line: Status = Awaiting Approval - Deny view and edit to all roles

Filter...

Clear



Manage Groups

For more information on field visibility, please refer to our guide[here](#).

1. Create a group for the Radio type field and define the visibility rules:

How Many? how_many

Copy rights from group

Select a group...

Copy

	All		Customer		Partner		Claromentis	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit
= Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny
= Additional Notification Recipients = Yes	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow

+ Add Condition Set

Adding the **Default (Always)** condition and setting the visibility to 'Deny' for all project roles will ensure the Radio field is always hidden by default.

Adding the **Additional Notification Recipient = Yes** condition and setting the visibility to 'Allow' will make the Radio field visible only when the checkbox field is enabled.

2. Create a separate group for each of the String type fields and define the visibility rules:

Email Address 1

Email Address email_address_1

Inactive Fields

Copy rights from group

Select a group...

Copy

	All		Customer		Partner		Claromentis	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny
Number Of Additional Notification Recipients = 1	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow

+ Add Condition Set

Email Address 2

Email Address email_address_2

Copy rights from group

Select a group...

Copy

	All		Customer		Partner		Claromentis	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny
Number Of Additional Notification Recipients = 2	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow

+ Add Condition Set

Email Address 3

Email Address email_address_3

Copy rights from group

Select a group...

Copy

	All		Customer		Partner		Claromentis	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny
Number Of Additional Notification Recipients = 3	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow

+ Add Condition Set

Adding the **Default (Always)** condition and setting the visibility to 'Deny' for all project roles will ensure the String field is always hidden by default.

Adding the **Number of Additional Notification Recipients = X** condition and setting the visibility to 'Allow' will make the String field visible only the corresponding number is selected.

Setup notifications

Lastly, notification can be configured so that emails are sent to users who have been added as additional notification recipients.

Add a new notification rule for any existing trigger that you need to send a notification for.

Advanced notifications

Configure email notification to inform users about changes in the tickets.

This is dependent on Triggers having first been added. The second action must be to either create a Notification Template or visit the Default Notifications Field page, to define the content of your email notifications when they send.

For a chosen Trigger, an email notification can be sent to project roles, individual email addresses, or user pickers on your form. For example, a trigger of 'New Ticket Submitted' could generate an email to a project role called 'Approvers', with a notification template asking the role's users to approve the ticket.

+ Add new rule

For more information on notifications, please refer to our guide [here](#).

1. Select the trigger and select the Email condition set under **And the form field**:

Discover - Notifications

https://discover.claromentis.com/intranet/panel...

Add new rule

Trigger

New issue reported

Add new trigger

Notifications template

Customer: Received

Send notifications to

☐ Customer

☐ Partner

☐ Claromentis

☐ Tech Support

☐ Support

☐ Admin

☒ Submitter of ticket

☐ Ticket handler

Also send to email address

And the form field

Email Address

Add/Change rule

In this example, the trigger for 'Public note added' has been used. When this trigger is met, emails will be sent to the specified email addresses under Additional Notification Recipients.

Public note added	Email	Customer: Updated	Submitter of ticket Form field: Email Address (email_address_1)	↑ ↓ 🗑
Public note added	Email	Customer: Updated	Form field: Email Address (email_address_2)	↑ ↓ 🗑
Public note added	Email	Customer: Updated	Form field: Email Address (email_address_3)	↑ ↓ 🗑