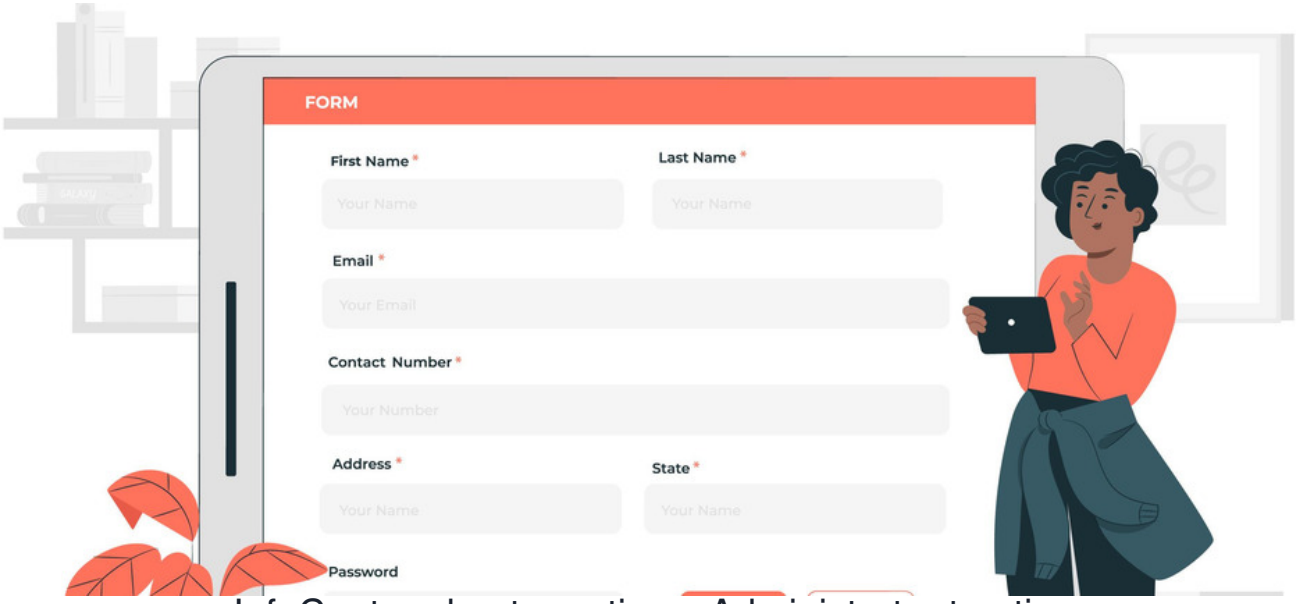
Link to article: https://discover.claromentis.com/knowledgebase/articles/903



InfoCapture best practices: Administrator top tips

InfoCapture is a substantial and powerful tool that can manage your information processes effectively when used correctly.

We appreciate there is a lot to get to grips with in InfoCapture and its particular mechanisms will become familiar with the experience.

Below are some best practice tips for administrators.

- Designate responsible users for your forms

Select form managers who will be responsible for administering and managing certain forms, as well as their changes.

For established forms, any changes made need to be well informed to prevent issues from being created as a consequence.

These individuals (or teams) need to become experts on the forms they look after e.g. how they work, what their purpose is, who needs to access them, how critical the form is to the company and crucially how to make changes if required.

When there is an issue in InfoCapture your responsible users are best placed to investigate first and either resolve using their own knowledge or submit a ticket with all relevant information they have.

These representatives can take our course to get started on form building, watch our webinars and follow all our literature to gain further understanding.

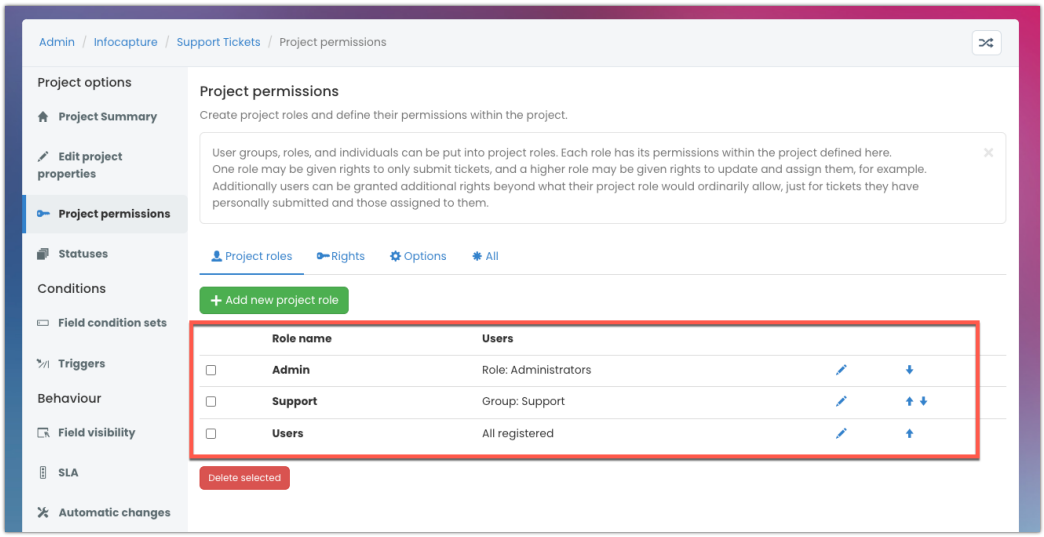
We at Claromentis are on hand to assist in creating a form or offer advice on how to make changes, however, it's always best to come from an internal team who understands your company and its needs.

If these users can build the form or become an expert on those which are needed day-to-day they are absolute assets to your company as they can problem solve in the first instance.

- Keep the number of project roles in a form to a minimum

An ideal number of roles would be no more than 3. e.g.

- **Administrators** - All rights, able to manage every part of the form as needed
- **Manager/role that fits your forms higher purpose** - More rights to interact with tickets as required for the forms use case
- **Ticket submitters** - Least rights, likely to be end users only



As a general rule, if you are creating more than 5 roles, it's likely that you are overthinking and adding unnecessary complexity.

The more complex the form, the more responsible users will need to be aware of its intricacies and how they work.

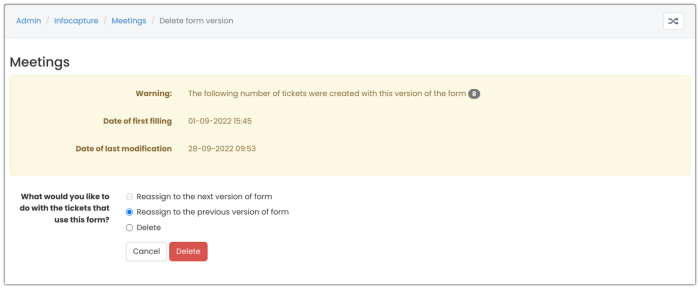
It's understandable you may need differentiation between roles, but try to assimilate some of these to keep the number of roles below 5 and make managing the form easier.

Less is more!

- Revert form field changes easily by deleting the latest form version

If a change is made to a form field that was a mistake or adversely affected your form once made live, the quickest way to rectify this is to delete the form version containing the change.

Rather than making further changes to a form to rectify the issue and checking this in, it is better to remove the form version and then build onwards freshly from this.

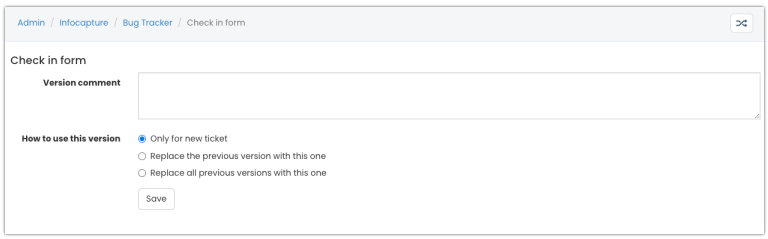


Hopefully, this would have been caught quickly so will be the most recent form version checked in and there will be no new tickets submitted in it. If so, it can be deleted straight away, or it has tickets submitted in it and these can be attributed to the previous form version when the most recent is deleted.

(Or those tickets could also be deleted and then resubmitted once the version is removed, if appropriate)

- Be aware that form logic is not tied to the form version (only form fields are)

Any changes made to the fields that make up a form are required to be saved in a new version of that form and checked in.



A new version can be applied to:

- Only new tickets
- Tickets submitted in the previous version only (and new tickets going forward)
- All tickets ever submitted in the project (and new tickets going forward)

The choice affects past, present and future tickets as the form version they are saved under is being altered.

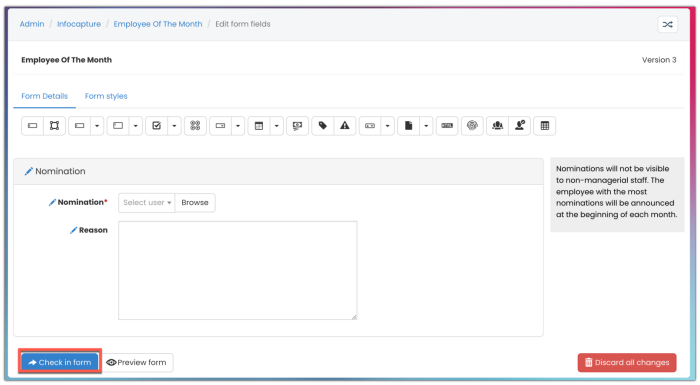
Outside of forms fields, every other change to the form (i.e. status, field conditions, field visibilities, notifications etc.) will always apply when updated as these are not tied to the form version.

This is something for responsible users to be aware of to avoid any confusion over what is being changed and when as well as what it will impact.

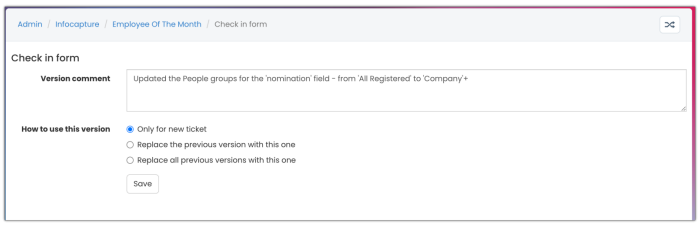
e.g. Making a change to the statuses within a form will be immediately applied and appear on the front-end. The only way to revert changes or further modify them is manually from the admin side of the form vs making a change to form fields, which is tied to the version checked in and the recommended way to revert this is to delete the form version where they exist.

- Add a version comment at every check-in to track form field changes effectively over time

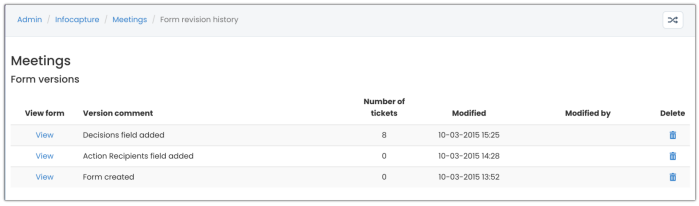
When checking in updates to your form fields...



...ensure a comment is left outlining what was changed at this stage:



This is paramount if any issues arise with the form in the future, the potential for this to be linked to a certain form version can be ascertained easily as each version will have a comment on what was updated.



Without a version comment, it's difficult to be sure what was added or removed when (without trawling through the archived audit logs), especially if a form is complex or previous responsible users in charge are no longer at the company.

- Hide fields to keep data searchable, and delete fields when the data is no longer needed

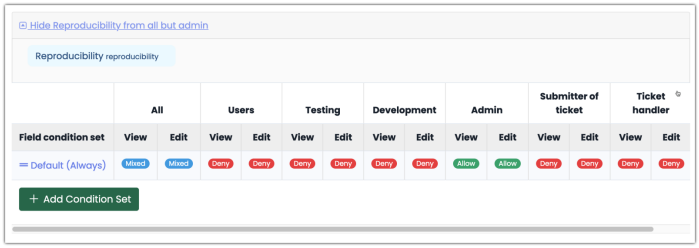
When a field is deleted and a new form version is checked in without it, new tickets are submitted not using the field but previous tickets submitted with it will retain it and its data.

However, the deleted field data will only be viewable when opening old tickets individually or exporting all tickets to a CSV.

The field can no longer be used to search and any report with it selected will no longer run, a deleted field cannot be chosen to appear in reports.

Your team should be aware of this behaviour when it comes to removing fields from a form.

If you need 'old' data to remain searchable in IC and viewable in reports, consider 'hiding' the field using visibility rules rather than deleting it, meaning this can be viewed by administrators/certain project roles you have chosen:

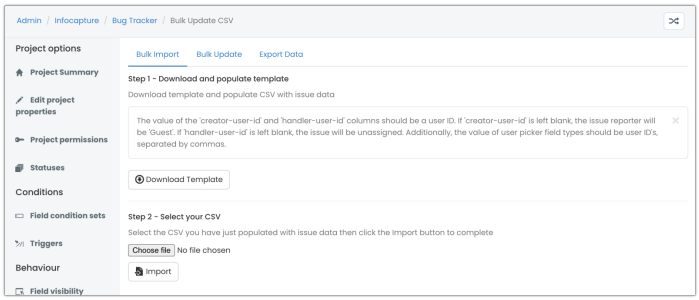


- Remain vigilant if performing data imports

When importing ticket information to a form it is important to ensure the data does not get disorganised, especially ticket IDs which should remain static.

Only run an import once and if an error is encountered investigate this first before attempting the import again as this can cause duplication which can be difficult to unpick in the database.

If you encounter an error on import you cannot resolve yourself, let us know in a support ticket and we can assist before another import is run to minimise the impact on your data.



- Maintain a separate test version of a form (or a general form used for testing)

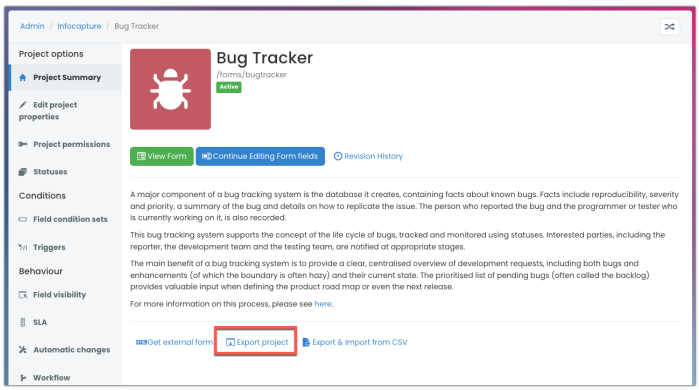
A common way to ensure any changes you wish to make to a live form have been tested ahead of implementation is to have a test copy of it on your site.

This can include just your responsible users in its permissions so only they can see and interact with it.

The risk of carrying out changes to the test form is far lower and can be more easily rectified as no end users are actively relying on it working for their

jobs.

Whole forms can be exported to ensure you always have an up-to-date copy to import when needed for testing.



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