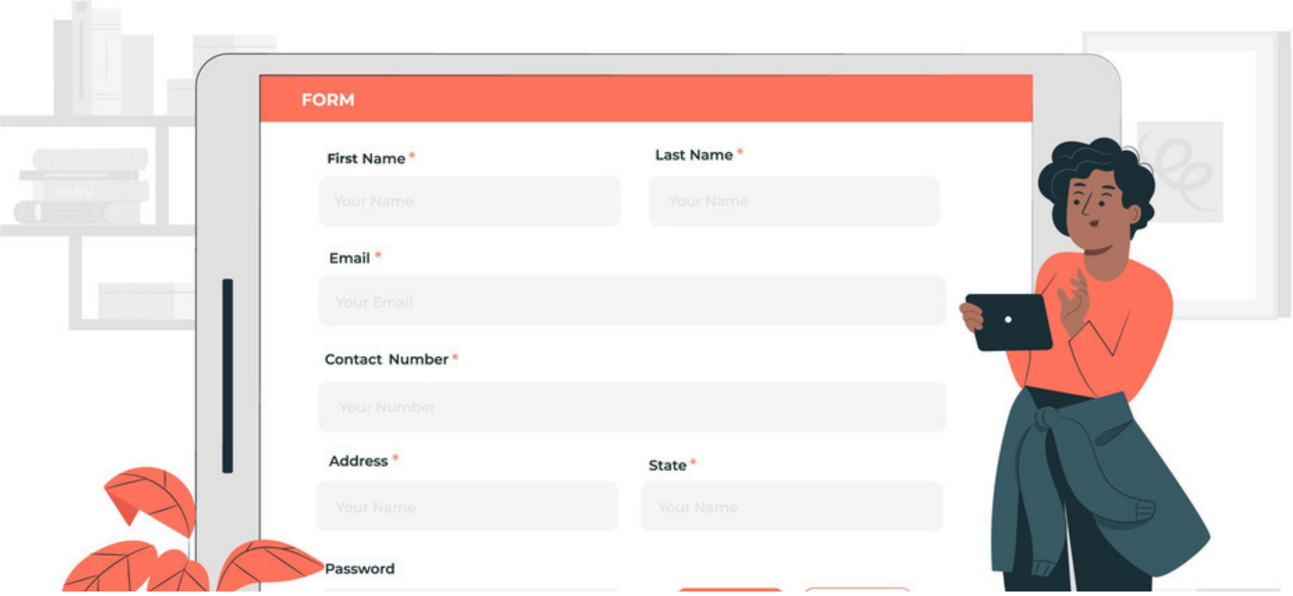
Link to article: https://discover.claromentis.com/knowledgebase/articles/920/infocapture-best-practices-form-functionality-changes



InfoCapture best practices: Form functionality changes

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

Below are some best practice tips for administrators managing changes over time.

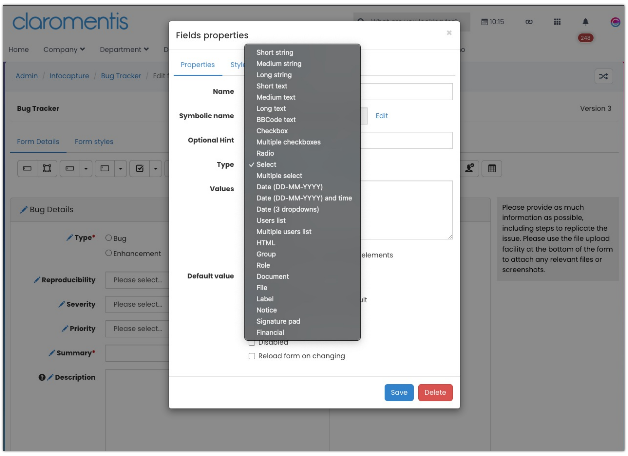
- Changing these elements in an established form *will* negatively affect past ticket data, they should be kept static once in use:

- Form field types
- Symbolic names
- Select field option values

- Consider the impact of changing a field condition set
- SLA timeframe changes will apply eventually
- Hide fields rather than deleting them

- Form field types

Changing the type of a field in an established form is a major data change.



Please provide as much information as possible, including steps to replicate the issue. Please use the file upload facility at the bottom of the form to attach any relevant files or screenshots.

It is not recommended to change a field type once in use. Doing so will break the database references to past data that was under the old type meaning it will not appear in InfoCapture filtering or reports.

The alternative is to create a new field in the form instead for your new purpose.

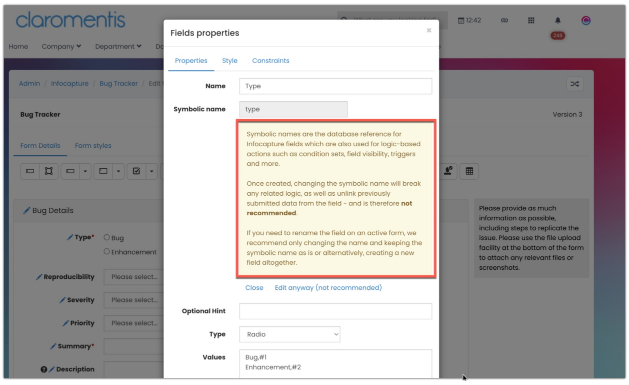
> If you have already changed the type and tickets have been submitted in the new form version, the fastest way to rectify this is to delete the latest form version to revert the field back to its previous type. Any tickets submitted in that version can be reverted to the previous as well, or simply

deleted and resubmitted if more suitable.

- Symbolic names

Used to distinguish between fields in the database, the alternatives to changing the symbolic name is to simply update the label of the field (and leave the symbolic name as it is) or create a new field for your purpose.

A warning explaining this further will appear in Claromentis v8.11+ when attempting to edit the symbolic name: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248
Home
Company
Department
Admin / Infocapture / Bug Tracker / Edit
Bug Tracker
Version 3
Form Details
Form styles
Bug Details
Type*
○ Bug
○ Enhancement
Reproducibility
Severity
Priority
Please select...
Summary*
Description
Please provide as much information as possible, including steps to replicate the issue. Please use the file upload facility at the bottom of the form to attach any relevant files or screenshots.

Fields properties

Properties | Style | Constraints

Name: Type

Symbolic name: type

Symbolic names are the database reference for Infocapture fields which are also used for logic-based actions such as condition sets, field visibility, triggers and more.

Once created, changing the symbolic name will break any related logic, as well as unlink previously submitted data from the field - and is therefore **not recommended**.

If you need to rename the field on an active form, we recommend only changing the name and keeping the symbolic name as is or alternatively, creating a new field altogether.

Close | Edit anyway (not recommended)

Optional Hint:

Type: Radio

Values:
Bug,#1
Enhancement,#2

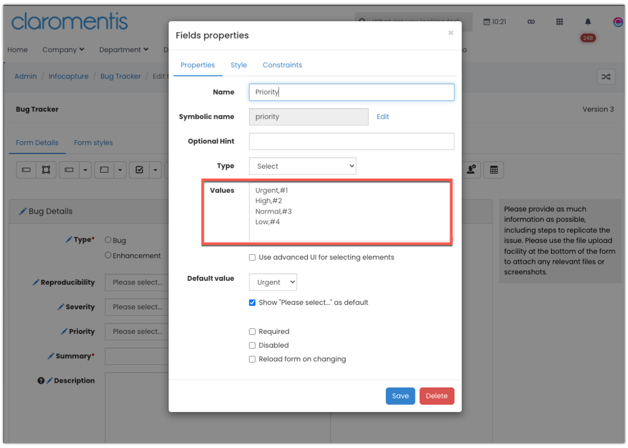
If you do update the symbolic name of an established field, expect to have to rectify form logic in your form following this, which could be time-consuming based on the complexity of your form.

Further to this, previously submitted data in that field can no longer be referenced e.g. in IC filtering, searches or reports which cannot be rectified unless the latest form version is deleted and the form reverts to where the symbolic name was not updated.

- Select field option values

Adding in new 'Select' options and labelling their values consecutively based on the other options is fine to do.

However, changing the values of the options around is not recommended as it will cause issues in the database.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Company
Department
Admin / Infocapture / Bug Tracker / Edit
Bug Tracker
Version 3
Form Details
Form styles
Bug Details
Type*
○ Bug
○ Enhancement
Reproducibility
Severity
Priority
Please select...
Summary*
Description
Please provide as much information as possible, including steps to replicate the issue. Please use the file upload facility at the bottom of the form to attach any relevant files or screenshots.

Fields properties

Properties | Style | Constraints

Name: Priority

Symbolic name: priority Edit

Optional Hint:

Type: Select

Values:
Urgent,#1
High,#2
Normal,#3
Low,#4

☐ Use advanced UI for selecting elements

Default value: Urgent

☑ Show "Please select..." as default

☐ Required
☐ Disabled
☐ Reload form on changing

Save | Delete

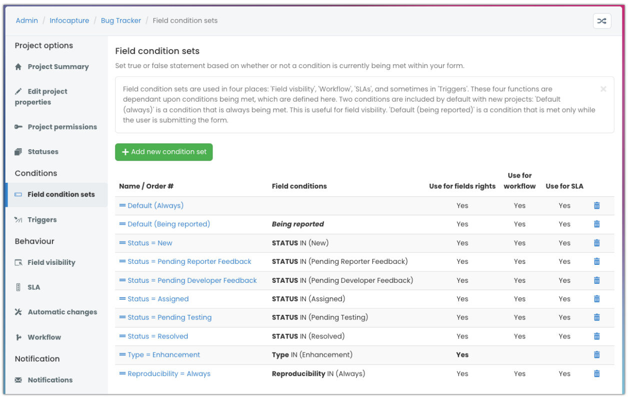
The value is used to denote the selection of that option, so if this has been used in the form in ticket submissions but this value is then changed and checked in for new tickets, the previous references to this option will not be retrievable.

It is necessary to only add new options with increasing value as mixing this around means values are easily overridden in the database, and this is very tricky to unpick.

- Consider the impact of changing a field condition set

Field conditions are true or false statements that we can use to define how the form should react in those situations.

Depending on the complexity of your form, there could be hundreds of field condition sets to maintain.



Admin / Infocapture / Bug Tracker / Field condition sets

Project options
- Project Summary
- Edit project properties
- Project permissions
- Statuses

Conditions
- Field condition sets
- Triggers

Behaviour
- Field visibility
- SLA
- Automatic changes
- Workflow

Notification
- Notifications

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 visbility', '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 visbility. '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	🗑
Status = New	**STATUS** IN (New)	Yes	Yes	Yes	🗑
Status = Pending Reporter Feedback	**STATUS** IN (Pending Reporter Feedback)	Yes	Yes	Yes	🗑
Status = Pending Developer Feedback	**STATUS** IN (Pending Developer Feedback)	Yes	Yes	Yes	🗑
Status = Assigned	**STATUS** IN (Assigned)	Yes	Yes	Yes	🗑
Status = Pending Testing	**STATUS** IN (Pending Testing)	Yes	Yes	Yes	🗑
Status = Resolved	**STATUS** IN (Resolved)	Yes	Yes	Yes	🗑
Type = Enhancement	**Type** IN (Enhancement)	**Yes**			🗑
Reproducibility = Always	**Reproducibility** IN (Always)	Yes	Yes	Yes	🗑

Every time a form is submitted or edited, the system will check which conditions have been met so those that are active need to be correctly applied to ensure your form works how you expect.

For any update to field condition sets, the knock-on effect of this needs to be considered and any further changes planned and put into place to ensure the form continues to function as required with no disruption to users.

The working world is dynamic so responsible users may need to make tweaks to your form over time, including field condition sets.

If the changes needed for your form are quite drastic, consider creating a new form for this purpose instead to ensure the current one is unaffected by the need for mass modification and your users can still use it whilst others are being developed.

Reminder: You can export a whole form for re-import to use for testing purposes, or in this scenario act as a starting point to build on and create a new form.

If you wish to make changes to field condition sets, review what the condition includes and check if this is being used anywhere else in the form as those areas may need updating also in line with your needs.

Ahead of changing a field condition set confirm its title phrasing so you can identify it.

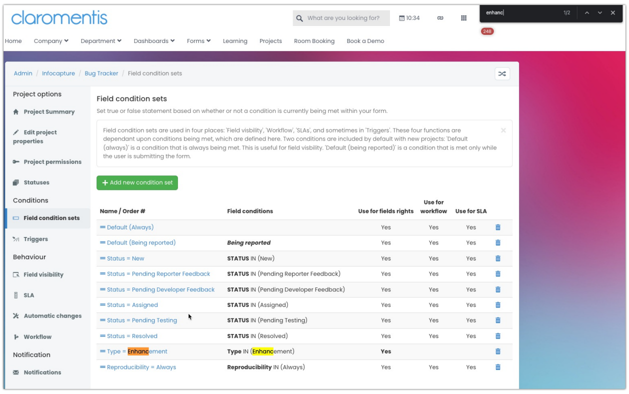
Next, work through each tab on the admin side to look for instances where the condition(s) is being used:

- Triggers
- Field Visibility
- SLA
- Automatic changes
- Workflow
- Notifications

You can search each tab page for the field conditions phrasing to speed up this process!

Anywhere the condition has been included will need to be considered for an update itself based on the change you are making and your forms needs.

e.g. In this example, if the conditions in 'Type = Enhancement' were to be changed, looking through each element to check where it has been referenced, this will have a knock-on effect on...



Admin / Infocapture / Bug Tracker / Field condition sets

Project options
- Project Summary
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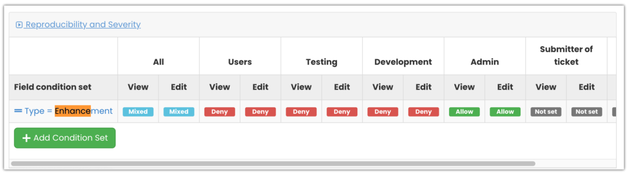
+ Add new condition set

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	🗑
Status = New	**STATUS** IN (New)	Yes	Yes	Yes	🗑
Status = Pending Reporter Feedback	**STATUS** IN (Pending Reporter Feedback)	Yes	Yes	Yes	🗑
Status = Pending Developer Feedback	**STATUS** IN (Pending Developer Feedback)	Yes	Yes	Yes	🗑
Status = Assigned	**STATUS** IN (Assigned)	Yes	Yes	Yes	🗑
Status = Pending Testing	**STATUS** IN (Pending Testing)	Yes	Yes	Yes	🗑
Status = Resolved	**STATUS** IN (Resolved)	Yes	Yes	Yes	🗑
Type = Enhancement	**Type** IN (Enhancement)	**Yes**			🗑
Reproducibility = Always	**Reproducibility** IN (Always)	Yes	Yes	Yes	🗑

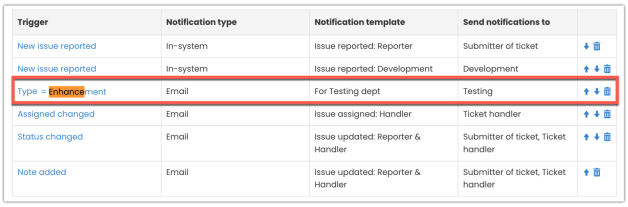
...the field visibility set it's used in...



Reproducibility and Severity

	All		Users		Testing		Development		Admin		Submitter of ticket	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
Type = Enhancement	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Allow	Allow	Not set	Not set

...as well as the notification trigger it's tied to:



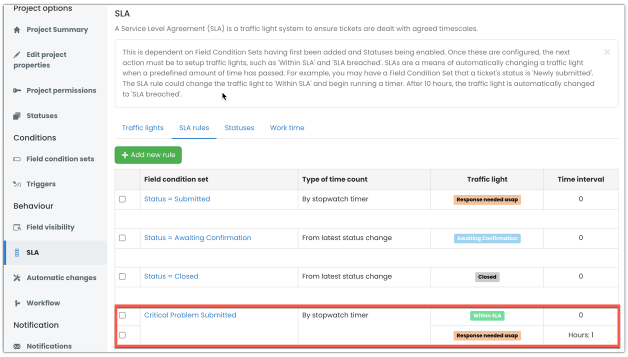
Trigger	Notification type	Notification template	Send notifications to
New issue reported	In-system	Issue reported: Reporter	Submitter of ticket
New issue reported	In-system	Issue reported: Development	Development
Type = Enhancement	Email	For Testing dept	Testing
Assigned changed	Email	Issue assigned: Handler	Ticket handler
Status changed	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler
Note added	Email	Issue updated: Reporter & Handler	Submitter of ticket, Ticket handler

Based on the new conditions being applied, each element that references it may need to be updated to ensure the logic of the form still works as you require.

The areas that will need updating will differ per form and the updates made to its elements will depend on your company's needs for it, which is why it's best to check out field condition sets and how they are used across a form before making updates to them.

- SLA timeframe changes will apply eventually

Making changes to the SLA timeframe requirements will apply to all tickets but not immediately. e.g. Updating the SLA rule highlighted below to be 1HR instead of 3HRS.



SLA

A Service Level Agreement (SLA) is a traffic light system to ensure tickets are dealt with agreed timescales.

This is dependent on Field Condition Sets having first been added and Statuses being enabled. Once these are configured, the next action must be to setup traffic lights, such as 'Within SLA' and 'SLA breached'. SLAs are a means of automatically changing a traffic light when a predefined amount of time has passed. For example, you may have a Field Condition Set that a ticket's status is 'Newly submitted'. The SLA rule could change the traffic light to 'Within SLA' and begin running a timer. After 10 hours, the traffic light is automatically changed to 'SLA breached'.

	Field condition set	Type of time count	Traffic light	Time interval
□	Status = Submitted	By stopwatch timer	Response needed asap	0
□	Status = Awaiting Confirmation	From latest status change	Awaiting Confirmation	0
□	Status = Closed	From latest status change	Closed	0
□	Critical Problem Submitted	By stopwatch timer	Within SLA	0
□			Response needed asap	Hours: 1

New tickets submitted will follow the updated rule and change after 1HR but past tickets in the form will need some kind of interaction to rectify (where applicable) e.g. editing and saving it, status change etc.

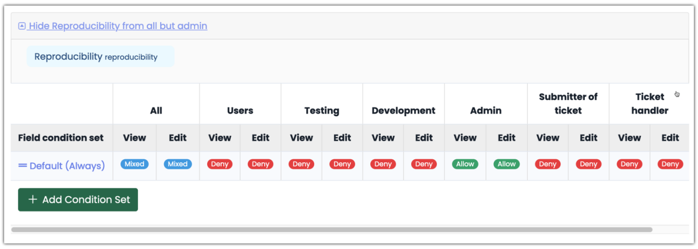
Outside this past tickets submitted before the changes should update when the background task runs (which is every day at 5 AM)

Therefore if you make changes to SLA timeframes it is best to wait at least 24 hours to check past tickets update as expected and if they do not after this period, let us know in a support ticket.

- Hide fields rather than deleting them

If the data within a field you want to delete should remain searchable in IC and viewable in reports, this needs to be 'hidden' using visibility rules rather than being deleted.

This means the data can be viewed by administrators/certain project roles you have chosen:



Hide Reproducibility from all but admin
Reproducibility reproducibility
+ Add Condition Set

	All		Users		Testing		Development		Admin		Submitter of ticket		Ticket handler	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Allow	Allow	Deny	Deny	Deny	Deny

Deleting a field means its data will be retained in past tickets submitted with it, but crucially this data can only be viewed on tickets individually in the system or by exporting all tickets to CSV - the data will no longer be searchable or able to be used in reports.

Next recommended article

Investigative tools

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InfoCapture investigative tools

Created on 14 December 2022 by Hannah Door. Last modified on 5 November 2024

Tags: edit, eform, Form, infocapture, SLA, symname