

InfoCapture best practices: Investigative Tools

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 or responsible users investigating issues raised by end-users in InfoCapture.

- Confirm user access to forms via project roles
- A user cannot perform a certain action? Check their rights
- Check the history tab
- Use the audit log to track if certain notifications were generated

- Confirm user access to forms via project roles

If a user reports an issue with InfoCapture the best place to start is to check they actually have permission to view it in the first place.

Check the project role permissions on the admin side of the form and look for that user being specified directly or a [People role/group](#) they are in being used.

If they are not specified or included in the roles/groups used, then this is the reason why they cannot access the form.

A screenshot of the InfoCapture 'Project permissions' page. The left sidebar shows navigation options: Admin, Infocapture, Exit Interview, Project permissions (selected), Project options, Project Summary, Edit project properties, Project permissions (selected), Statuses, Conditions, Field condition sets, Triggers, Behaviour, Field visibility, and SLA. The main content area is titled 'Project permissions' and contains a sub-instruction: 'Create project roles and define their permissions within the project.' A note below explains: 'User groups, roles, and individuals can be put into project roles. Each role has its permissions within the project defined here. One role may be given rights to only submit tickets, and a higher role may be given rights to update and assign them, for example. Additionally users can be granted additional rights beyond what their project role would ordinarily allow, just for tickets they have personally submitted and those assigned to them.' A table lists project roles: Admin (Role: Administrators), Human Resources (Group: Human Resources), and Managers (Role: Managers). The 'Managers' row has a red border around it. At the bottom are buttons for 'Delete selected' and 'Add new project role'.

- A user cannot perform a certain action? Check their rights

Check they are included in permissions for the form as above.

If they are specified, next check the 'Rights' tab to confirm the project role they are in has permission to perform the action they expect.

Rights	Project role				
	<input type="checkbox"/> Admin	<input type="checkbox"/> Human Resources	<input type="checkbox"/> Managers	<input type="checkbox"/> Submitter of ticket	<input type="checkbox"/> Ticket handler
View tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update tickets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submit tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Handle tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Update tickets status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assign tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Add notes to a ticket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View attached files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attach files to a ticket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View history of tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manage tickets (delete, files, notes)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View reports page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
View statistics page	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Save

If not, give them the required permission in the table and save this to resolve.

If it's not appropriate for the role they are in to have this ability then you can make further edits to your form to encompass this in a more suitable way. e.g. A new project role to include and differentiate users with these abilities

- Check the history tab

The 'History' tab gives an overview of all changes taking place in or to a ticket over time.

This is really useful when investigating issues as it's essentially an audit log of events specific to that ticket.

Date Modified	User name	Field	Change
06-02-2015 15:39	Anne Wilkins	New ticket	
06-02-2015 15:46	Simon Walker	Status	New => Pending Developer Feedback
06-02-2015 15:46	Simon Walker	Assigned to	=> Simon Walker
13-03-2015 16:23	Simon Walker	Status	Pending Developer Feedback => Pending Testing
06-09-2017 15:41	Claromentis Administrator	Assigned to	Simon Walker => Rose Sharp
01-12-2022 14:50	Claromentis Administrator	Type	Bug => Enhancement

It shows in black and white whether a change took place, a field was edited, an SLA was breached etc. in chronological order.

Use the History tab to determine facts about a ticket over its lifetime and draw conclusions about why something you expected to occur may or may not have as well as how to rectify this in your form.

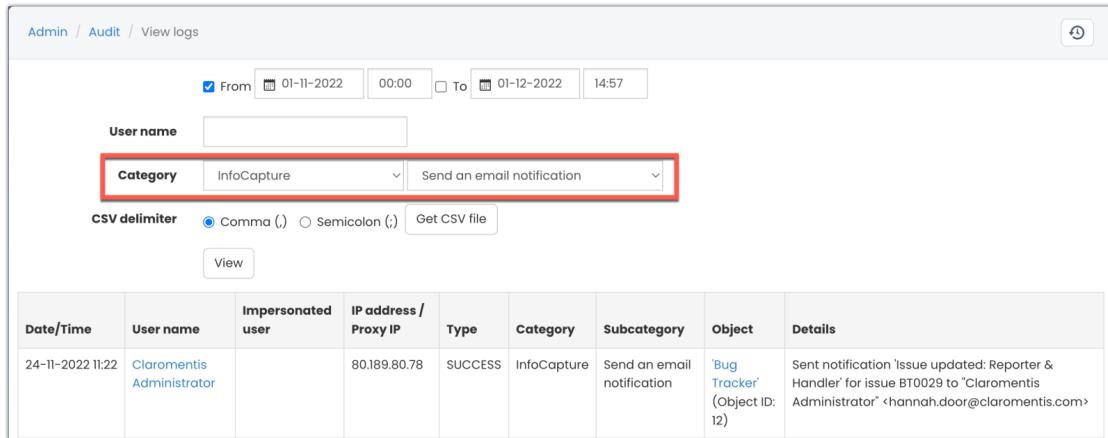
- Use the audit log to track if certain notifications were generated

One of the most common issues raised about InfoCapture is that a user did not receive a notification from a form when it was expected.

We have a [detailed guide](#) on how administrators can troubleshoot notifications and investigate.

To investigate in the first instance it can be confirmed with absolute certainty whether the issue lies with the form logic (i.e. a notification was never triggered for that user) or the notification was triggered and generated but not received by the user (i.e. indicating a server or user environment issue)

Utilise the audit log to check if the system generated a notification at the time it should have for the specific user and the appropriate ticket ID:



The screenshot shows the 'View logs' page in the Admin / Audit section. The search filters are set to 'From 01-11-2022 00:00' and 'To 01-12-2022 14:57'. The 'Category' dropdown is set to 'InfoCapture' and the 'Subcategory' dropdown is set to 'Send an email notification'. The 'CSV delimiter' is set to 'Comma (,)'. A single log entry is listed in the table:

Date/Time	User name	Impersonated user	IP address / Proxy IP	Type	Category	Subcategory	Object	Details
24-11-2022 11:22	Claromentis Administrator		80.189.80.78	SUCCESS	InfoCapture	Send an email notification	'Bug Tracker' (Object ID: 12)	Sent notification 'Issue updated: Reporter & Handler' for issue BT0029 to "Claromentis Administrator" <hannah.door@claromentis.com>

If there is something logged, then the form is working correctly and the issue lies with the server or the user themselves.

If there is nothing logged, then the issue lies in the configuration of the form and this will need to be investigated by your administrators or responsible users to identify what is preventing the notification from being triggered (more information in the notification troubleshooting guide).

Related Article

[InfoCapture administrator top tips](#)

[Infocapture form functionality changes](#)

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