Offices

All data within the system is segmented with office codes (except the statewide voter file which is not directly viewable by any user). All Senate offices have already been created and are viewable through the “Office” link at the top right of LegCRM. Only super users see the Office Link.

The attributes of an office include:

* Office Number – system assigned and invariant for the life of the application.
* Office Email – the public email for the senator or representative.owning the office.
* Office Name – only used for the office list.
* SS Code – the secretary of state code for the district of the office. This has to be assigned before any voter file updates are done. (Voter file updates are done periodically using direct database queries. See documentation in repo.) SS Codes have been assigned for all senate offices.
* Office Enabled – all access to an office can be turned off by disabling it. This will also stop synchronization of the office inbox. Senate offices not in active use are in disabled status.
* Outlook Categories Enabled – determines whether the message parser updates categories within the outlook inbox. This should be enabled at the same time the office is enabled to assure that when the inbox is initially parsed, categories are assigned. Otherwise only new messages will be categorized.
* Mail Held – allows LIS to stop the office from sending email.
* Last Sync – the last time the office email was synchronized with outlook. Should be within a couple of minutes ago unless a long synch run for a new office is in progress.

Onboarding new offices

New offices can be created at any time, but best practice is to create them in a batch script with all SS Codes prepopulated. Ideally, that would be done for House offices.

All senate offices have already been created and fully populated with voter data, so all that needs to be done to get a new office started is:

* Give staff and the senator access to LegCRM through AAD
* Add the staff and senator as users to LegCRM within the office
* Enable Outlook categories for the office if desired
* Ask how many messages are sitting in the senator’s inbox. *If the inbox count is more than a few hundred, schedule enabling of the office for the evening*. The sync and parse routines are single threaded and serve all offices. A large inbox will tie up the synch and parse threads until it is done. For a box with forty thousands of emails, this can take one or two hours.
* Enable the office

Apart from the above mechanical steps for the office it is important to ask about any existing CRM that they wish to convert data from. This is basically straightforward using the upload function, but requires some careful thought to avoid duplicate record creation and to assure that all usable data is carried forward.

Users

Before a user can see LegCRM at all, they must be granted access within Azure Active Directory by LIS. Once that is done, they must additionally be created within LegCRM. Users can be created when viewing an office.

Users are created within offices and only see data within the office. They are identified by their email which is verified against Azure Active Directory for every system interaction. They can be created with the following capabilities.

There are four capability levels:

* “*Only as assigned”*  -- can see only assigned emails and assigned cases.and cannot download lists or send email.
* “*All non-email functions”*  -- can view any constituent record and download lists, but can only see emails as assigned and cannot send emails.
* *“All CRM functions”* – can perform any CRM function, including sending emails, but cannot create users or alter user capabilities.
* “*Create Users (LIS)”* can add or alter users, and can perform any CRM function but only has access to CRM data within the office in which it is created.

Most offices give most of their users “*All CRM functions”* capability

Diagnostics available within Office View

Normally, the Inbox within LegCRM should match the Outlook Inbox for the office’s public facing email. The first thing to check if that is not the case is the “Last Sync” for the Office (visible through the office UI). That should be within the last few minutes. If not, take a look at the recent mail error log entries, also visible directly from the office interface. If these logs shed no light, then probably other offices are also down and the Azure webjob logs should be checked for they sync tasks.

If the sync appears to be up to date, but not all messages are appearing, there is likely a problem with the parser task. Messages can’t actually show in the inbox until they are parsed. Check the webjob logs for the parser to identify an error that is bringjng down the parse job. Some uncaught exceptions in the parse process could bring the job down without advancing past the problem message. In this case, a quick coding fix may be needed and if that is not possible, one could update the “folder\_uid” of the job to some very high number to force bypass of that message. Folder\_uid is zero until the messages is parsed and then is set equal to ID after parsing. It is a vestigial field that now serves only to track parse status.

The office view also include reporting on messages placed in the send queue over the past 7 days.