Merative Social Program Management 8.1

Cúram Calendaring Configuration Guide

Note

Before using this information and the product it supports, read the information in

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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1 Configuring Calendaring

Configure calendar meetings minutes and activities with application properties. A number of calendar events are available that allow for extra customizations to be developed.

1.1 Introduction

Introduction

The purpose of this guide is to describe the configuration options available for calendars within the application. This includes meetings, meeting minutes, and activity configuration.

Also included in this document is an appendix that details the events that developers can use to customize standard calendaring functionality.

Audience

This guide is intended for administrators and developers responsible for configuring the calendaring components. It is assumed that the administrators and developers have worked with code tables, application properties, and system security as part of system administration.

Prerequisites

This guide should be read in conjunction with the `Cúram Calendaring Business Guide.`

Chapters in this Guide

The following list describes the chapters within this guide:

- **Configuring Meetings and Meeting Minutes**
  This chapter describes the configuration options available for meetings and meeting minutes.
- **Configuring Calendar Activities**
  This chapter describes the configuration options available for how activities are displayed in calendars.

1.2 Configuring Meetings and Minutes

Introduction

This chapter describes the configuration options available for meetings and meeting minutes. The following is a brief list of the main configuration options available:

- issuing of meeting requests and meeting minutes,

- the configuration of sender information for meeting request emails,
- the set-up of the email account for meeting request replies,
- the handling of meeting conflicts,
- configuring the meeting response batch.

Issuing Meeting Requests to All Meeting Attendees

Meeting requests can be issued to meeting attendees upon meeting creation and when new attendees are invited. The default value of the application property, curam.send.meeting.requests , is 'YES', thus ensuring that meeting requests are issued to all meeting attendees. One of the benefits of issuing meeting requests is the ability for potential meeting attendees to store the invite not only in their application calendars but also in alternative email accounts, for example, a Microsoft® Outlook email account.

Email addresses should be configured for each meeting attendee. If no email address is configured, then an informational is displayed to the user issuing the meeting requests: "A meeting request was not issued to '%1s' as they do not have a valid email address". If the meeting organizer does not have a valid email address, the following informational is displayed: "A meeting request was not sent to you as you do not have a valid email address".

When this is set to 'NO', meeting requests will still appear in the invited attendees meeting calendars; however, no meeting requests will be issued via email. Also, the following informational is displayed to the meeting organizer: "A meeting request was not issued to the attendee(s) as the system administrator specified not to send meeting requests".

Configuring Sender Information for Meeting Request Emails

As part of issuing meeting requests to meeting attendees, it is necessary to configure sender information for meeting request emails. Sender information includes the sender name, sender email address, and sender host name. The agency must specify the required values for the sender information, since there are no useable defaults set OOTB.

Sender Name

The application property, curam.meeting.request.reply.name , defines the sender name to appear in meeting request emails, for example, the social enterprise agency name.

Sender Email Address

The application property, curam.meeting.request.reply.address , defines the sender's email address for meeting request emails. This is also the email address to which email responses are sent.

Sender Host Name

The application property, curam.meeting.request.reply.host , defines the host name of the email server where the meeting request responses are sent.

Setting Up an Email Account for Meeting Request Replies

An email account for meeting request replies must be set up for meeting invitees to be able to respond to meeting requests. This account requires a username, password, and folder where responses can be stored. Since this information is agency specific, there are no defaults set.

Username

The application property, curam.meeting.request.reply.username , defines the username for the email account which receives meeting request replies. This is used in conjunction with the password to access the email account to check for meeting request responses.

Password

The application property, curam.meeting.request.reply.password , defines the password for the email account which receives meeting request replies. This is used in conjunction with the username to access the email account to check for meeting request responses.

Folder on Mail Server

The application property, curam.meeting.request.reply.folder , is used to name the folder where the meeting request responses are stored on the agency mail server.

Handling Meeting Conflicts

Informationals are used to assist the meeting organizer in handling meeting conflicts. Informationals can be displayed when a meeting conflicts with meetings in an invitee's application calendar and when a meeting conflicts with meetings in the organizer's application calendar.

When Meeting Conflicts with Meetings in Invitee Calendars

The application property, curam.meeting.warn.attendee.conflicts , determines whether or not an informational should be displayed if a meeting conflicts with an existing meeting for an attendee. The default value is 'YES'; the following informational is displayed for meeting conflicts in the meeting invitee(s) application calendar(s): "This meeting conflicts with an existing meeting in %1s's calendar".

When Meeting Conflicts with Meetings in the Organizer's Calendar

The application property, curam.meeting.warn.organizer.conflicts , determines whether or not an informational should be displayed if a meeting conflicts with an existing meeting for the meeting organizer. The default value is 'YES'; the following informational is displayed for meeting conflicts in the meeting organizer's application calendar: "This meeting conflicts with an existing meeting in your calendar".

Issuing Meeting Minutes to Selected Meeting Attendees

The application property, `curam.meetingminutes.issue`, indicates whether or not meeting minutes should be issued to the selected meeting attendees, for instance, by an email. The default value of this property is *YES*, such that meeting minutes will be emailed to selected meeting attendees upon issue.

The default information that is included in the email is the meeting subject and location, date and time of the meeting, the social enterprise folder that the meeting relates to, and any meeting notes that have been recorded. The meeting minutes are attached as a PDF document in the email sent to meeting attendees.

If an email address is not defined for an invitee, the following informational is displayed informing the user issuing the minutes: `The minutes cannot be issued to %1s as they do not have a valid email address.`

If this property is set to *NO*, meeting minutes will not be issued to any meeting attendees via email and the following informational is displayed: `Meeting minutes were not issued to the selected invitee(s) as the system administrator specified not to issue meeting minutes.`

Displaying Meetings that can be associated with Meeting Minutes

As part of recording meeting minutes, a list of existing meetings that have occurred is displayed. (The meeting related to the meeting minutes can be selected from this list). To limit the number of meetings that appear in this list, the application property, `curam.meetingminutes.numPriorDaysToDisplayMeetings`, indicates the number of days prior to the current date for which meetings are displayed. The default value of this property is '30'. All meetings that occurred 30 days prior to the current date will appear in the list of social enterprise folder meetings to be associated with the meeting minutes.

Meeting Response Batch

The meeting response batch is used to check for email responses from meeting invites and to update the meetings in calendars with these responses. This batch can also be configured to delete invalid messages.

How the Batch Works

Agencies are required to set up scheduling for the meeting response batch. When the batch is initiated, it connects to the mail server using the configured parameter: username, password, and folder on mail server. The batch then processes each received message on the mail server by parsing mail messages and looking for messages of type 'response'.

Each of the 'response' mail messages have an iCalendar attachment. The meeting response batch uses the information in the attachment to update the meeting attendee information accordingly. The following describes the potential meeting responses:

Table 1: Meeting Response Actions

Code	Case Status
Accept	The attendee is marked as accepted, the meeting is added to the application calendar and to the meeting attendee's email account, e.g. Microsoft Outlook or an equivalent.
Decline	The attendee is marked as declined. It still appears in the application calendar but does not appear in the attendee's email account.
Mark as Tentative	The attendee is marked as tentative, the meeting is added to the application calendar and to the meeting attendee's email account, e.g. Microsoft Outlook or an equivalent.

Once the meeting response batch has completed one of the above actions, it then deletes each processed meeting request response. It will also delete invalidate messages, if configured to do so.

Configuring the Batch to Delete Invalid Messages

The application property, curam.meeting.response.delete.invalid.messages , indicates if the meeting response batch job should delete invalid messages that are sent to the meeting response mailbox. The default value is 'NO'.

1.3 Configuring Calendar Activities

Objective

This chapter describes the configuration options available for how activities are displayed in calendars.

Setting the Maximum Number of Occurrences for a Recurring Activity

Administrators can specify the maximum number of occurrences for a recurring activity using the `curam.calendar.maxnumberofoccurrences` application property. The default value is 365.

Setting the Number of Days that Events and Activities will Appear in the Calendar

The number of days that events and activities for product deliveries and integrated cases will appear in the calendar from the present date can be configured using the `curam.calendar.noofdaysevents` application property. The default value is 7. For example, if the property is set at 7 days, then the calendar will display all the events and activities where the event/activity start date lies between today and seven days time.

1.4 Calendaring Configuration Options Summary

Application Properties

The following table provides a summary of the calendar, meeting, and meeting minute application properties.

Table 2: Summary of Meeting and Meeting Minute Application Properties

Application Property	Summary
curam.calendar.maxnumberofoccurrences	This specifies the maximum number of occurrences for a recurring activity.
curam.calendar.noofdaysevents	This specifies the number of days that events and activities for product deliveries and integrated cases will appear in the calendar from the present date.

Application Property	Summary
curam.send.meeting.requests	This indicates whether or not meeting requests are issued to meeting attendees upon meeting creation. The default is 'Yes'.
curam.meeting.request.reply.name	This defines the sender name to appear in meeting request emails, for example, the agency names.
curam.meeting.request.reply.address	This defines the sender's email address of meeting request emails.
curam.meeting.request.reply.host	This defines the host name of the email server where the meeting request responses are sent.
curam.meeting.request.reply.username	This is used in conjunction with the password to access the email account to check for meeting request responses.
curam.meeting.request.reply.password	This is used in conjunction with the username to access the email account to check for meeting request responses.
curam.meeting.request.reply.folder	This is the name of the folder where the meeting request responses are stored on the agency mail server.
curam.meeting.response.delete.invalid.messages	This indicates if the meeting response batch job should delete invalid messages that are sent to the meeting response mailbox. The default value is 'YES'.
curam.meeting.warn.attendee.conflicts	This determines whether or not an informational should be displayed if a meeting conflicts with an existing meeting for an attendee. The default is 'YES'.
curam.meeting.warn.organizer.conflicts	This determines whether or not an informational should be displayed if a meeting conflicts with an existing meeting for the meeting organizer. The default is 'YES'.

1.5 Calendaring Events Summary

Introduction

Events provide a mechanism for customization to occur without altering OOTB code, allowing customers to add additional processing to existing processing while maintaining a loosely coupled application. An event is raised from within a component class. When an event occurs, one or more components classes registered as listeners for this event will receive notification.These listener classes can, in turn, be used to perform custom processing. The following sections describe the events that are available for use to customize calendar meetings and meeting minutes.

Meetings Events

The following sections provides a summary of the meetings persistence and workflow events which can be used to provide custom processing based on standard application functionality.

Persistence Events

The following table describes the persistence events available for meetings created within the application.

Table 3: Persistence Events for Meetings Business Processes

Event	Primary Data	Secondary Data	Raised From
preCreateMeeting	Create Meeting	N\A	Create Meeting
postCreateMeeting	Create Meeting	N\A	Create Meeting
preCancelMeeting	Cancel Meeting	N\A	Cancel Meeting
postCancelMeeting	Cancel Meeting	N\A	Cancel Meeting
invalidAttendeeEmailAddress	Validate Attendee Email Address	curam.meetings.sl.impl.Meeting	Validate Attendee Email Address
inviteAttendee	Invite Attendee	curam.meetings.sl.impl.Meeting	Invite Attendee

Workflow Events

The following table describes the workflow events available for meetings created within the application.

Table 4: Workflow Events for Meetings Business Processes

Event	Primary Data	Secondary Data	Raised From
Meeting.NEW_MEETING	Create Meeting	N\A	Create Meeting
Meeting.CANCELLED_MEETING	Cancel Meeting	N\A	Cancel Meeting
Meeting.INVITE_ADDITIONAL_ATTENDEES	Invite Attendee	meetingAttendeeID	Invite Attendee

Meeting Minutes Events

The following sections provide a summary of the meeting minutes persistence and workflow events which can be used to provide custom processing based on standard application functionality.

Persistence Events

The following table describes the persistence events available for meeting minutes created within the application.

Table 5: Persistence Events for Meeting Minutes Business Processes

Event	Primary Data	Secondary Data	Raised From
issueMinutes	Issue Minutes	N\A	Issue Minutes
postRecordMeetingMinutes	Record Meeting Minutes	N\A	Record Meeting Minutes
postModifyMeetingMinutes	Modify Meeting Minutes	N\A	Modify Meeting Minutes
postDeleteMeetingMinutes	Delete Meeting Minutes	N\A	Delete Meeting Minutes
postCreate	Create Meeting Decisions	N\A	Create Meeting Decisions

Event	Primary Data	Secondary Data	Raised From
postUpdate	Update Meeting Decisions	N\A	Update Meeting Decisions
postCreate	Create Notes	N\A	Create Notes
postUpdate	Update Notes	N\A	Update Notes
postCreate	Create Attendance	N\A	Create Attendance
postUpdate	Update Attendance	N\A	Update Attendance

Workflow Events

The following table describes the workflow events available for meeting minutes created within the application.

Table 6: Workflow Events for Meeting Minutes Business Processes

Event	Primary Data	Secondary Data	Raised From
MEETINGMINUTES.ISSUE_MINUTES	Issue Minutes	N\A	Issue Minutes
MEETINGMINUTES.RECORD_MINUTES	Record Meeting Minutes	N\A	Record Meeting Minutes
MEETINGMINUTES.MODIFY_MINUTES	Modify Meeting Minutes	N\A	Modify Meeting Minutes
MEETINGMINUTES.DELETE_MINUTES	Delete Meeting Minutes	N\A	Delete Meeting Minutes
MEETINGMINUTES.CREATE_DECISIONS	Create Decisions	N\A	Create Decisions
MEETINGMINUTES.UPDATE_DECISIONS	Update Decisions	N\A	Update Decisions
MEETINGMINUTES.CREATE_NOTES	Create Notes	N\A	Create Notes
MEETINGMINUTES.UPDATE_NOTES	Update Notes	N\A	Update Notes
MEETINGMINUTES.CREATE_ATTENDANCE	Create Attendance	N\A	Create Attendance
MEETINGMINUTES.UPDATE_ATTENDANCE	Update Attendance	N\A	Update Attendance

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