ClientSpace Setup & Administration

A guide for configuring ClientSpace

ClientSpace R98

Company Website: http://www.prismhr.com

ClientSpace Support: extranet.clientspace.net/next

Contents

Chapter 1

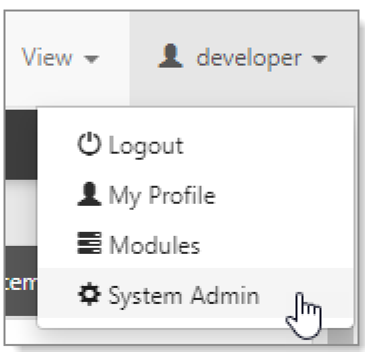
Accessing ClientSpace System Administration

System administration of the ClientSpace system is limited to global administrators. Navigation to the System Administration area is described as **Go to System Admin**. This means that from the modules bar, you select your *username*, and then select **System Admin**.

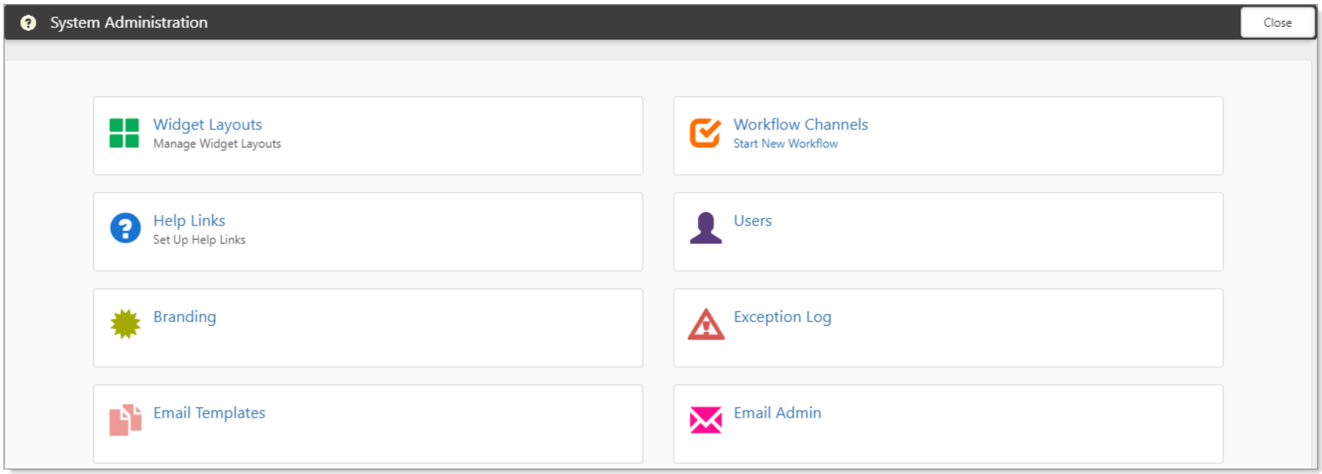
Administrative dashboard

To access the administrative area of ClientSpace:

1. Locate the modules bar. It is positioned across the top of your ClientSpace window.
2. On the modules bar, click **<username>** > **System Admin** .



The System Administration dashboard opens.

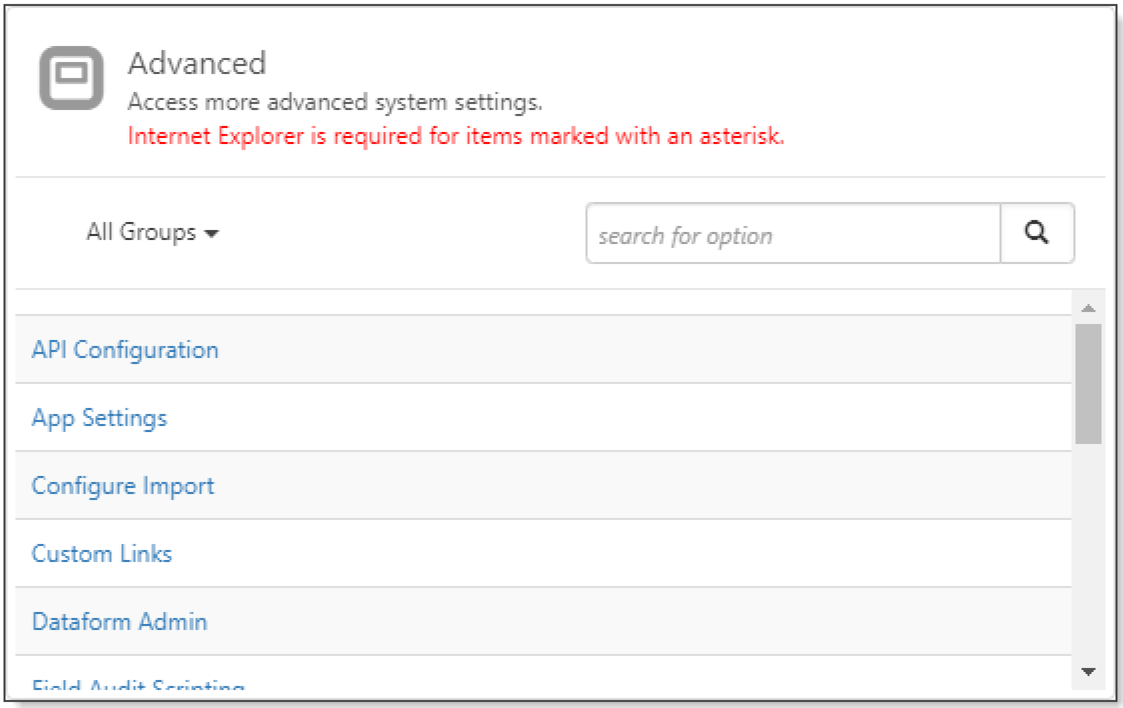


Advanced Administration functions

Advanced Administrative functions require the Global Admin permission and an Enterprise License. Help topics that discuss Advanced Administration are labeled with .

To configure any of the Advanced system settings:

1. Near the lower portion of the dashboard, locate **Advanced**.
   The Advanced area provides a list of advanced system settings: API Configuration, App Settings (only available to PrismHR users), Configure Import, Custom Links, Dataform Admin, Field Audit Scripting, Manage Field Display, Manage Rules, Reports, Scheduled Processes, Tables, Templates, Third Party Applications, and Time Tracker Categories.

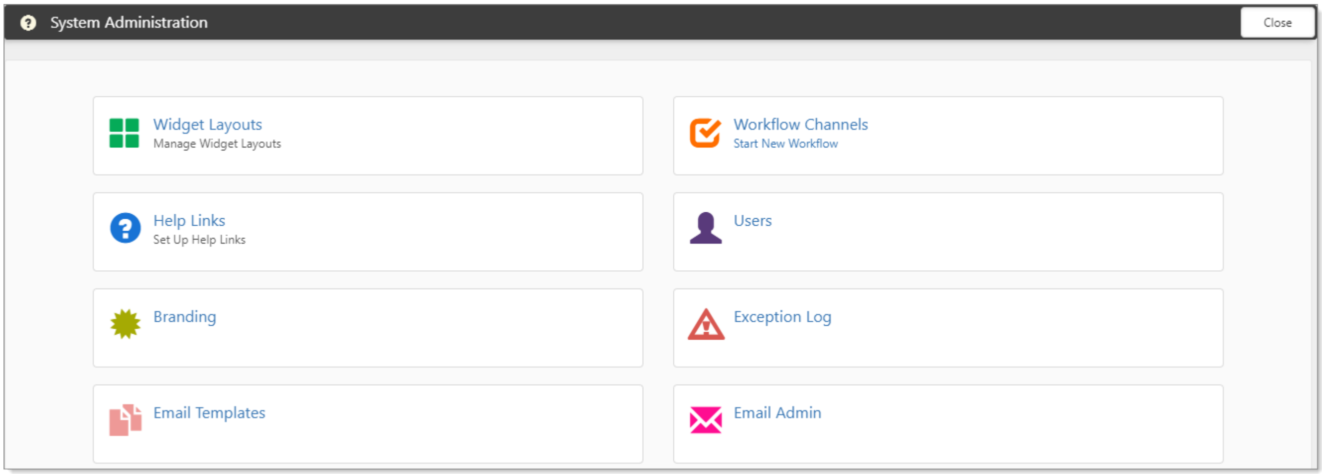


2. Select an option.
   The selected option opens.

Note: Access to **Templates** requires Internet Explorer. **App Settings** is only available to User Developers.

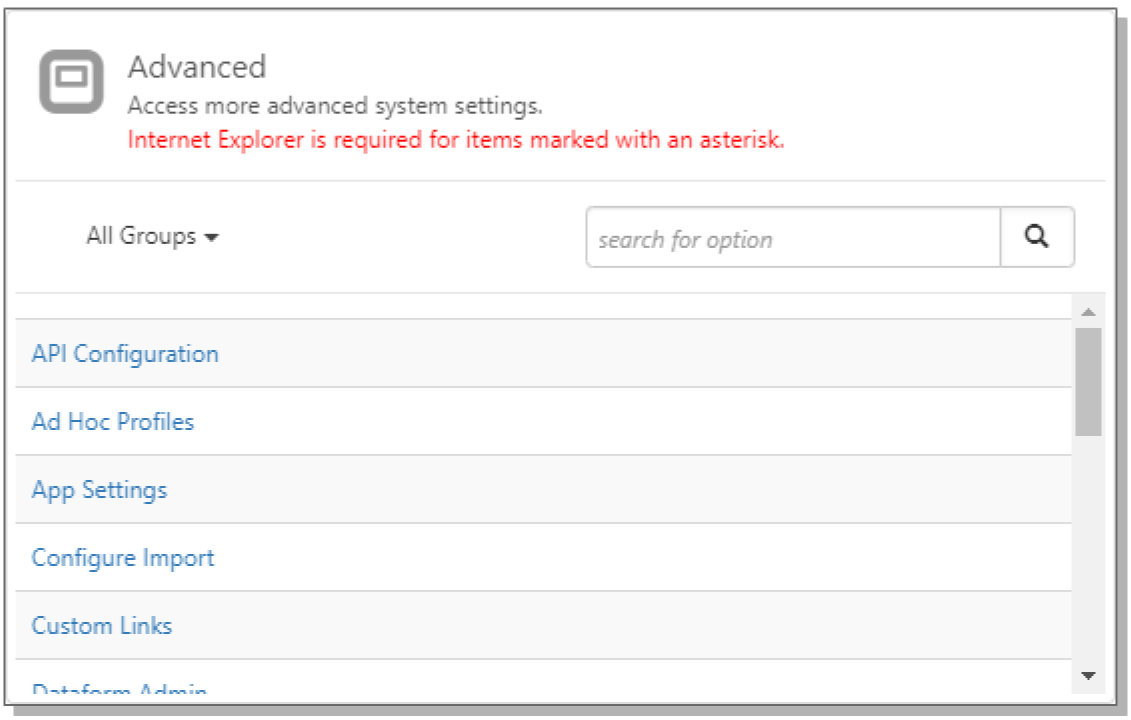
System Administration dashboard

The System Administration dashboard is where global administrators perform actions such as configuring workflow channels, setting up email templates, and assigning roles.



Advanced Administration

Additional functionality for System Administration is available in the **Advanced** section. Entries are Advanced Administration and require additional ClientSpace licensing. Advanced Administration topics are labeled with .



Follow the links to learn more about Advanced Administration:

- **API Configuration**: APIs are used in ClientSpace to connect one software system to another to facilitate the transfer of data between the two systems. ClientSpace Help offers topics about configuring APIs. See APIs and Configuring the API .
- **App Settings**: Configure your organization ClientSpace settings to include communications (configure how the default admin email setting is used throughout the application), system, and Business Intelligence. For assistance with App Settings, please log a case in the Extranet.
- **Configure Import**: Configuring import data. See Configuring nightly imports .
- **Custom links**: Configured links improve the user experience by making related dataforms, reports, and workflow available from dataforms. See Configuring links .
- **Dataform Admin**: Dataforms are your workspace building blocks. See Dataforms .
- **Manage Rules**: You can configure business rules on the Client Processing Team dataform so when a Service Team is selected, the Client Team various roles auto-populate. See Configuring rules and business logic.

Ensuring ClientSpace email is delivered to your domain

Many of the ClientSpace systems generate emails – Calendar events, Client Service Case, and Task notifications are among the most frequent email generators. To ensure these auto-generated emails do not get interpreted as spam, you should authorize the ClientSpace system as a valid sender of mail for your domain. There are many ways to do this, but the simplest and most foolproof are one or a combination of the following methods. Each mail and DNS system can be radically different, so this topic provides an overview of suggested steps you should take but is not meant to provide step-by-step instructions on how to perform these actions. Your network or IT Administrator will most likely perform the following changes.

To authorize ClientSpace for mail in your domain, do one or more of the following:

1. Add the ClientSpace Server IP or hostname to your email system unrestricted list.
   - An unrestricted list allows emails from a source, such as ClientSpace, into your email Inbox. The procedure for adding trusted email addresses to your unrestricted list varies across the different email clients and internet security platforms.
2. Utilize SPF records in your company DNS servers to authorize the ClientSpace Server IP or hostname as valid for your domain mail.
   - An SPF Record is simply a DNS Record published for a domain that dictates which servers are allowed to send mail on behalf of that domain. When a mail server receives a message, it looks up the DNS record from domain to determine if the server sending the message is published in the SPF record. If the sending server is not in the published SPF record, the message fails. There are a number of free SPF generators available. Research

the phrase "SPF generator." There are also a number of sites for checking the validity of the SPF record you create. These sites should be utilized by an administrator in your environment familiar with DNS and its configuration.

- The generated DNS record for the domain should look similar to the following, but should be customized based on how your network utilizes DNS : `v=spf1 mx a:mail.clientspace.net ~all`

For questions about the IP address of your ClientSpace server for mail authorization, please log an Extranet case.

ClientSpace FAQs

Some questions keep coming up again and again, look here to find some of the most frequently asked questions.

Administrative FAQs

- Best practices for standard imports
- Common import errors
- How to find your installed ClientSpace version. See the *ClientSpace User Guide*.
- Importing the Comp Code Master records
- Configuring Organization and Workspace Security

Issue resolution FAQs

- pwPermissionViolation when accessing linked dataform. See Application troubleshooting.
- SendMail or other scheduled process does not appear to be working. See Administration troubleshooting.

Technical FAQs

- ClientSpace security tips
- CSV Import File Creation macro
- Outlook add-in disables each time Outlook restarts. See Outlook add-in and modules issues.

How to FAQs

- Configuring lookups

- Configuring dynamic field display
- Configuring the PrismHR API for Initial Imports
- Configuring rules and business logic
- Configuring security in Business Intelligence reporting
- Configuring task fields
- Configuring dynamic field display

Finding the basics of Dataform management and ClientSpace configuration

So, you wake up one day and realize that you are the ClientSpace expert at your company. With your new found awesome powers comes awesome responsibility - feeling lost? These articles cover the basics of dataform management and ClientSpace configuration.

Dataforms

- Configuring lookups
- Adding tabbed dataforms to a parent form
- Configuring dynamic field display
- Configuring field display with multiple values
- Configuring links
- Configuring parent form datatypes
- Configuring rules and business logic
- Configuring the Zip Code datatype
- Dataform field naming standards
- Changing number of decimal places
- Dataforms
- Distributing your dataform: Making dataforms accessible
- Parent form datatype morphing
- Required field business rules

Chapter 2
Email Templates

Email Templates enable ClientSpace administrators to configure automated messages that trigger on specific conditions. Email Templates provide an incredibly powerful method to automate emails. One way to use them is to detect and prevent fraud attempts when someone changes critical information, such as direct deposit numbers or email addresses.

Email Templates can produce a multitude of notifications, including:

- Messaging and branding.
- Notifying dynamic recipients, such as internal team members, worksite employees, and contacts.
- Triggering from fields on ClientSpace tables and dataforms, and data changes in PrismHR.
- Data from ClientSpace forms.
- Data imported from PrismHR.
- Data from process triggers, such as onboarding a new client.
- Calendar events.
- Emails to employees when changes occur to critical information, such as direct deposit account number, address, status, type, social security number, pay rate, and work or personal email.

Configuring Email Templates

Email templates enable ClientSpace administrators to configure automated messages that trigger on specific conditions. Configuring email templates guides you through a five-step procedure: Initial, Content, Addresses, Conditions, and Attachments.

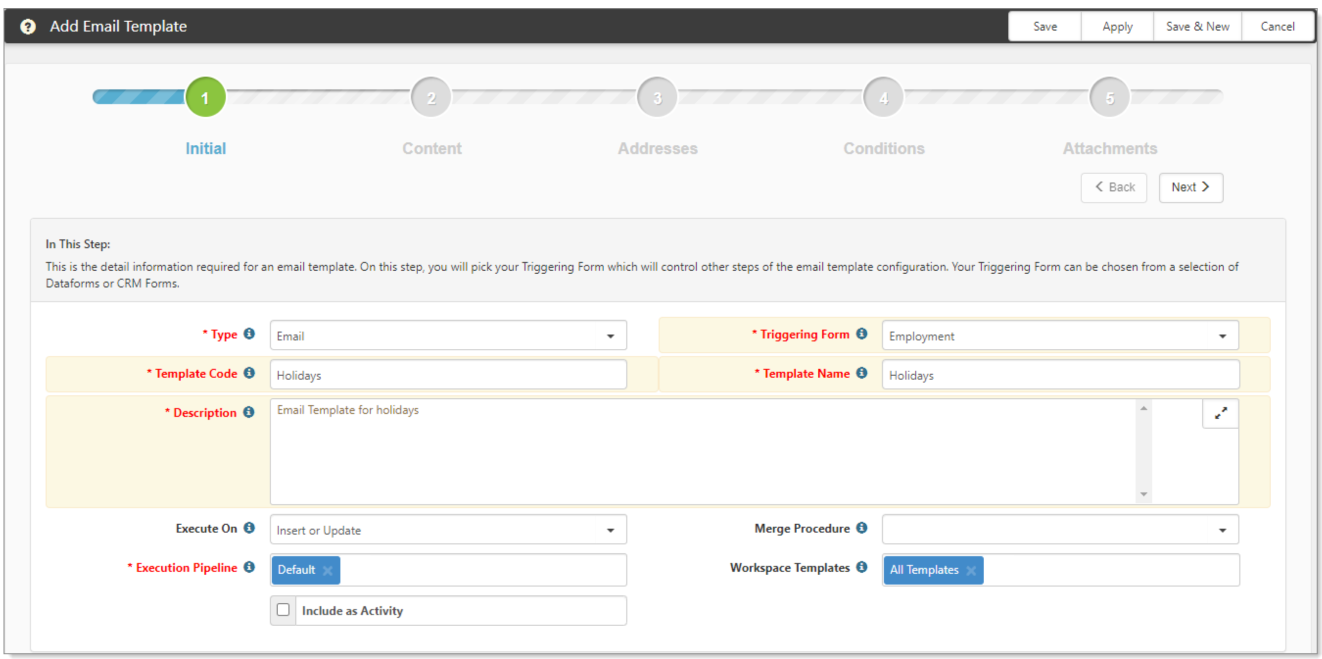
This topic gets you started. After you click **Add**, follow the procedures to complete the five-step process.

To get started:

1. Go to **System Admin** ⚙ > **Email Templates**.
   The Email Templates dashboard opens showing a list of published Email Templates.
2. To configure an existing email template, locate the template in the list and click (**Open**). Follow the steps in the following topics.
3. To configure an email template, click **Add**.
   The Add Email Template workflow is presented, with a series of steps to start generating your new template.
4. Continue to the next step: Step 1: Initial.

Step 1: Initial

The Add Email Template workflow opens. In Step1, you provide detail information about your template.



To begin Step 1:

1. Complete the form fields.

Type	Select **Email**.

Triggering Form	Your selection in the Triggering Form field is the dataform or table where the trigger resides (a field change, a value change). The change to the dataform or table is what triggers the email. Triggering Form is used synonymously with a database table or a dataform[1]. **To add a dataform that is not in the list:** 1. In the **Triggering Form** field, go to the end of the list and select **Add Untriggered Form**. The Select an Untriggered Form dialog box opens. Table Name contains a list of all dataforms currently not marked as Triggerable. 2. In **Table Name**, select a dataform from the list. 3. Click **Ok**. The selected dataform is marked as triggerable and now appears in the Triggering Form list.
Template Code	Must be unique and should be related to the purpose of the email template.
Template Name	Provide a short, descriptive name for your template. Displays in the email template list.
Description	Provide a useful description of the email template.
Execute On	Will this email be sent the first time the form is saved (Insert), only when the form is changed (Update), or every time (Insert or Update)? When there are changes to the dataform that you selected in Triggering Form, the Execute On value controls triggering for Insert, Update, or both Insert and Update.
Merge Procedure	Select an optional Merge Procedure here to provide additional system information for field replacement. The procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_merge_proc**. Merge Procedure[1] also determines the fields that are available to use in field replacement.

[1]Dataforms dynamically create and manage configurable data collection points. When you add a dataform, a new table is added to the database. Dataforms enable workflow systemization.
[1]A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

Execution Pipeline	Email templates can support multiple pipelines[1] using a multi-select. This allows you to create a single email template that can apply to multiple execution pipelines. Select the pipelines on which the email triggering is to occur.
Workspace Templates	Select the Workspace Templates[1] to receive this email.
Include as Activity	Select this option to attach the email as an Activity. When the email is triggered, the email message attaches to the triggering record. This action preserves the communication of the sent email. Default: The option is cleared, do not include as an Activity.

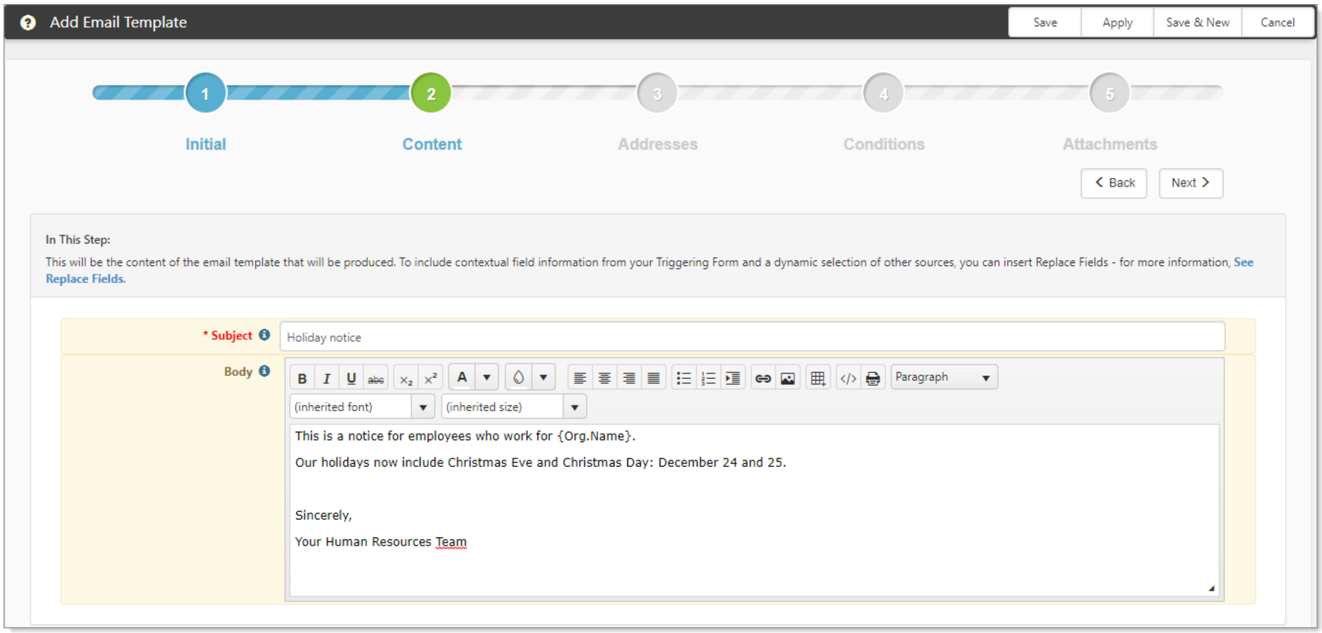
2. Click **Next** to proceed to Step 2: Content.

[1] A pipeline determines which rules are applied when the data is saved.

[1] Workspace Templates are special workspaces used for cloning during the Workspace creation process. In this way, ClientSpace allows you to set up multiple workspace configurations (such as an industry-specific Workspaces with a specific, limited list of TOC items) then choose how you want the workspace to look and feel by selecting the appropriate template during workspace creation.

Step 2: Content

In the Content step, you provide a Subject and Body – the email message. You can insert information using replacement fields from the **See Replace Fields** link.



To configure the content of the email:

1. In **Subject**, provide the subject of the email to be generated.
2. In **Body**, provide the email message.

> Body uses a rich text editor and supports font styling, embedded images, hyperlinks, lists, and tables. For best results, we recommend embedding .jpg or .jpeg images.

3. To use field replacement, click **See Replace Fields**.
   You can paste items in Subject and Body as applicable. See Replacement Fields.

   Field replacement includes:

   - Any active fields on the triggering dataform
   - The active fields from the tabbed dataforms related to the triggering form (any child forms of the parent dataform)
   - When you select Task as the Triggering Form in Step 1 Initial, Task fields are available for field replacement

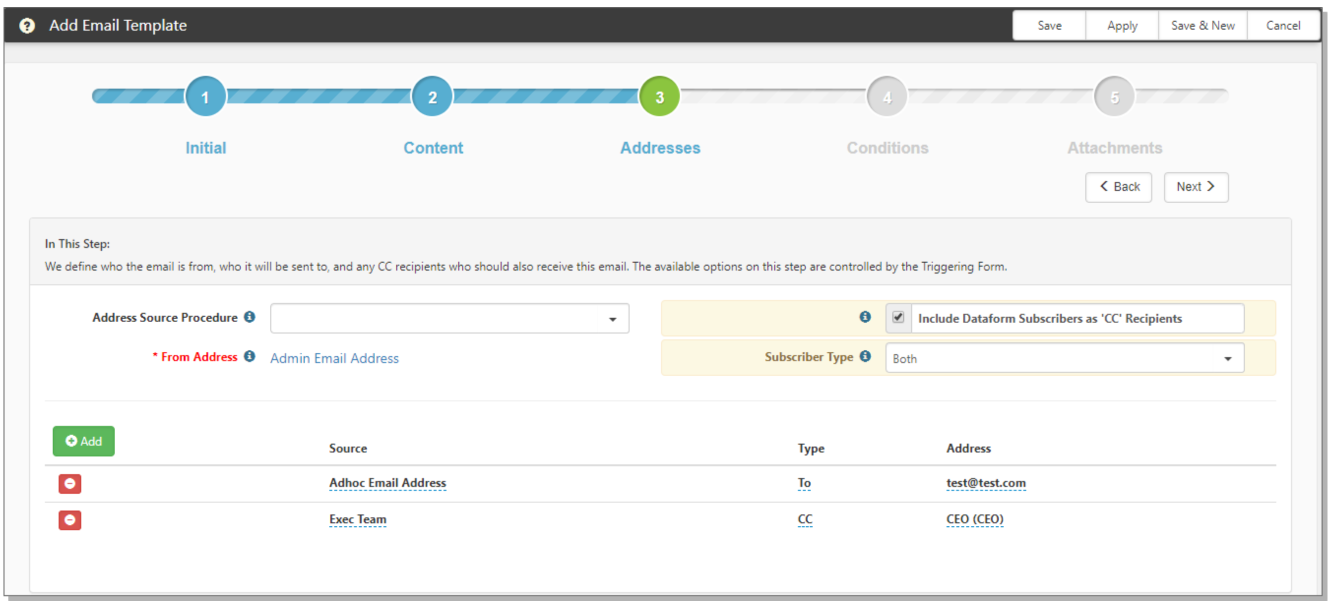
- The active fields from the related Organization and Org Other Info
- Any fields returned by the Server Data Procs related to the triggering dataform

4. Click **Next** to proceed to Step 3 Addresses.

To continue the process, go to Step 3: Addresses.

Step 3: Addresses

This step defines who the email is from, who will receive it, and any CC recipients. You can use a custom stored procedure to include email addresses from system objects other than the triggering form. By default, the system excludes the current user who triggers the email. In Source, you can select Current User to ensure that user receives an email.



To configure recipients:

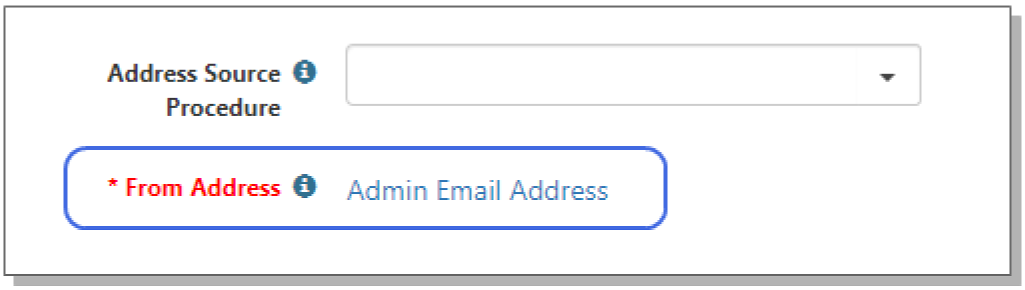
1. Complete the form fields.

Address Source Procedure	Select a stored procedure (optional) that generates data to provide additional recipient email addresses. Select from any stored procedure in the system with a name containing **emailtemplate_recipient_proc**. The recipient proc list only displays valid options based on the Triggering Form in Step 1.
Include Dataform	Adds anyone who has subscribed to the dataform as CC recipients when this notification is sent in addition to any other recipients you configure here. When

<table>
<tr>
<td>Subscribers as CC Recipients</td>
<td>enabled (selected), this option presents a list to notify internal, external, or both recipient types:

Internal: When the email template triggers, only internal dataform subscribers are notified.
External: When the email template triggers, only external dataform subscribers are notified.
Both: If you select Both or leave the field blank, all dataform subscribers are notified.

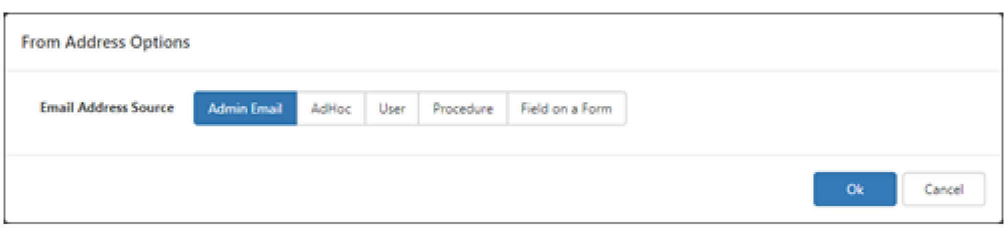
</td>
</tr>
<tr>
<td>From Address</td>
<td>Select the From Address for the email. You can set this field to the email of the default admin user, a specific user, or from a field on a form.



This field defaults to Admin Email Address, which is the application administrator's email address. This is the default admin email set in System Admin > Advanced > App Settings. Only User Developers can change this email address.

To select from a distinct set of options:

Click the link Admin Email Address.
The From Address Options dialog box opens.



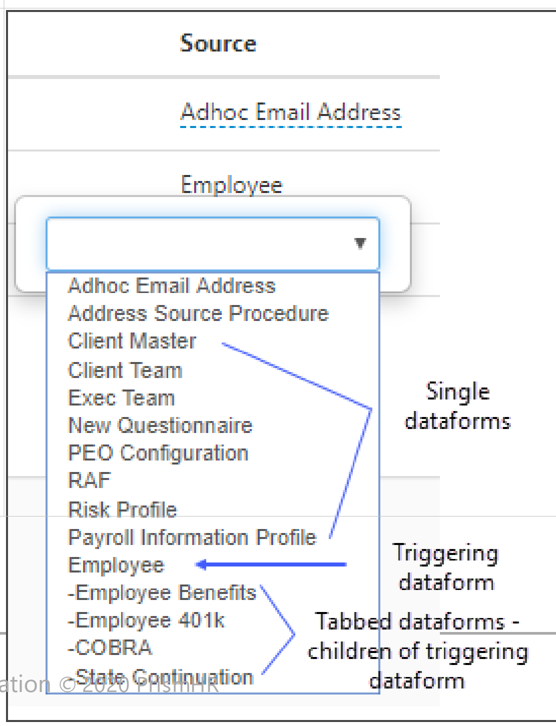
Select one of the following options:

Admin Email: Uses the default admin email set in System Admin > Advanced > App Settings. Only User Developers can change this email address. For assistance with App Setting, please log an

</td>
</tr>
</table>

	Extranet case. ■ **AdHoc**: Allows you to manually add to the From list by simply typing the email address. Additionally, you can specify a friendly name to accompany the email address. For more details about using AdHoc, see Specifying a friendly name as From Address. ■ **User**: Select a specific user of the system. ■ **Procedure**: Select an address stored procedure and pick the From address. ■ **Field on a Form**: Select a dataform from a list of forms in the system that have relevant email fields. You can set user fields to values that exist on dataforms across a tabbed set. If the selected user fields are empty, the default value is the system admin. For more details, review the following section From a Field on a Form. 3. When done, click **Ok**.

2. To add a new recipient record to this notification, click **Add**.
   A new row opens for Source, Type, and Address. Each recipient's source, type, and address must be unique.
3. Complete the fields:

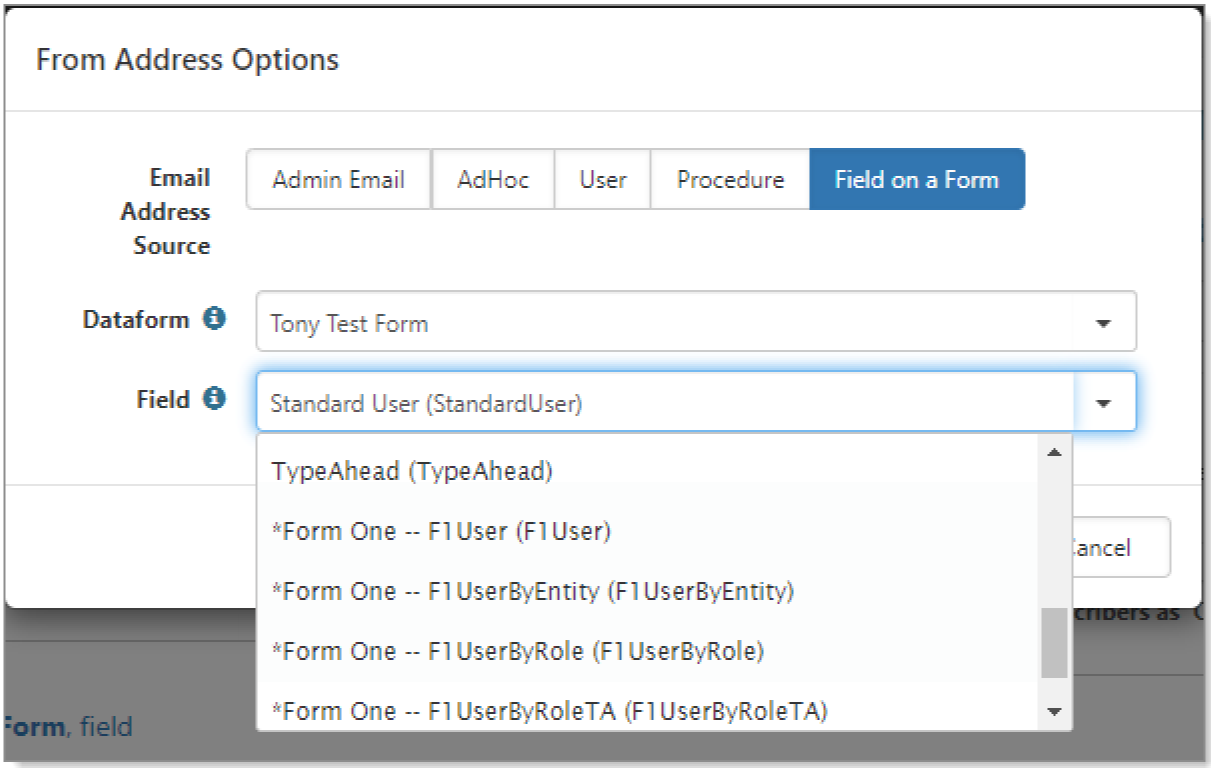
Source	Source is where you select the source of your recipient email addresses or user contacts. When you select a source from the list, then any available email addresses or user contacts are available in the **Address** column. Recipient Source options are:	
		• The triggering dataform selected in Step 1 Initial. In the example, the Triggering Form is Employee. • Single dataforms that exist in workspaces with either email fields or user fields. • Tabbed dataforms that are children of the triggering dataform. The tabbed

	dataforms (child forms) appear immediately after the triggering form in the Source list and are preceded by a dash (–). The Source list includes all tabbed dataforms included in the tabbed set. • **Adhoc Email Address**: When you select as Source, type the email address in the **Address** field. • **Employee**: When you select Employee, you can specify Employee Work or Personal Email address in Address. See Specifying Employee Work and Personal Email. • **Address Source Procedure**: An email address selected from the Address Source Procedure. The email addresses appear in **Address** if a proc with email fields has been selected in the **Address Source Procedure** field. • **Current User**: Includes the logged in user who triggers an email template. By default, the system excludes the current user who triggers an email template.
Type	What kind of email recipient type are you setting? Options are **To** or **CC**.
Address	• For a dataform source, select the user or contact type field on the form from which you would like to extract the email address. • When Source is **Address Source Procedure**, select a recipient type: AdminEmail, CaseSubscribers, CaseTypeRoleUsers, and ImmediateSupervisor. • When Source is **Adhoc Email Address**, use this field to type an email address to use every time manually.

4. Click **Next** to proceed to Step 4: Conditions.

From a Field on a Form

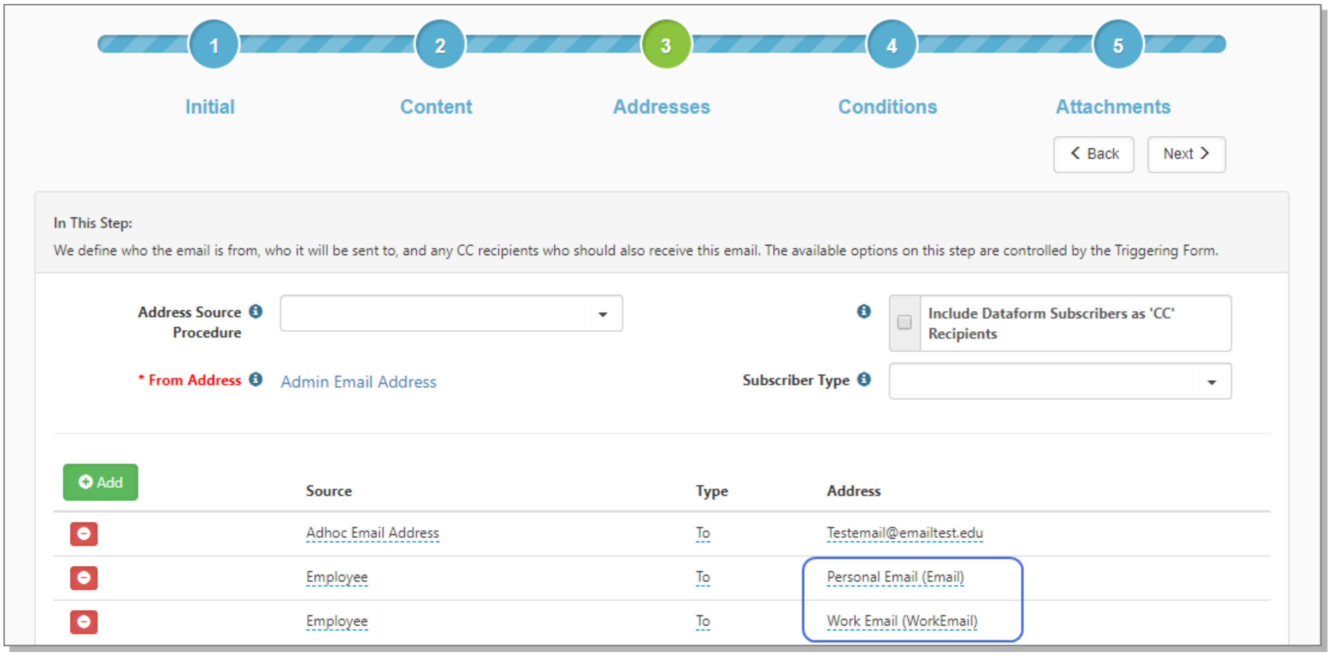
From the From Address Options dialog box, when you select **From a Field on a Form**, you can set user fields to values that exist on dataforms across a tabbed set. You can choose from which Dataform and then when you select a dataform, choose the Field. The Dataform drives the items in the Field list that you choose. The user fields include any child forms in a tabbed relationship. The child form has an asterisk in the name, as in `*Form One -- F1 User(F1User)`.



Specifying Employee Work and Personal Email

You can use the email address fields on the Employee dataform as recipient options for Email Templates. You must select **Employee** as the Source for the Work Email and Personal Email fields to be available in the Address column.

Using an Address Source Procedure can make the Employee Work and Personal Email addresses available when the Triggering Form (selected in Step 1 Initial) is **not** Employee. For more details, see Configuring email templates to notify external employees. If you have questions, please log an Extranet case.



To specify Employee Work or Personal Email addresses:

1. Click **Add**.
   A row opens for Source, Type, and Address.

Source	Select **Employee** to enable the Work and Personal Email in the Address column.
Type	What kind of email recipient type are you setting? Options are **To** or **CC**.
Address	Select **Work Email** or **Personal Email**.

2. To add more recipients, click **Add**.
3. When complete, click **Next**.

Specifying a friendly name as From Address

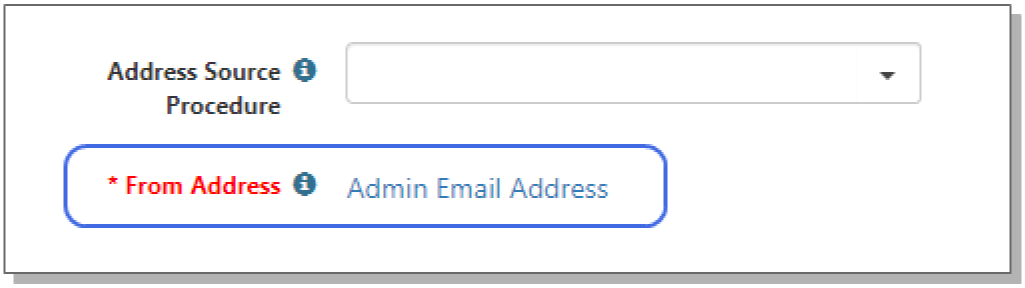
In Step 3 Addresses, you can specify an optional friendly name to display when the **From Address** uses **AdHoc** for Email Address Source. This makes it less likely that recipients will view the email as spam. When you select the AdHoc option, specify the Email Address and a From Friendly Name. The friendly name displays in the email along with the actual email address.

For example, let's say you want the friendly name to be your organization name and a function or department, such as `PrismHR Support`, along with `support@prismhr.com` as the actual email address. The email recipient would see:

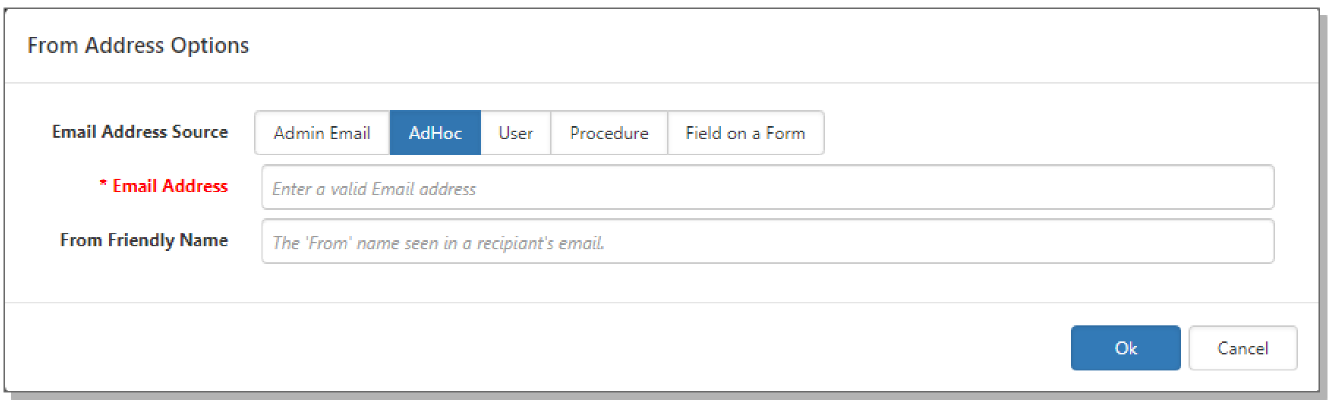
PrismHR Support <support@prismhr.com>

To specify a friendly name:

1. In the Email Template wizard, go to **Step 3 Addresses**.
2. On **From Address**, select the **Admin Email Address** link.



The From Address Options dialog box opens.



3. Select **AdHoc** and complete the form:

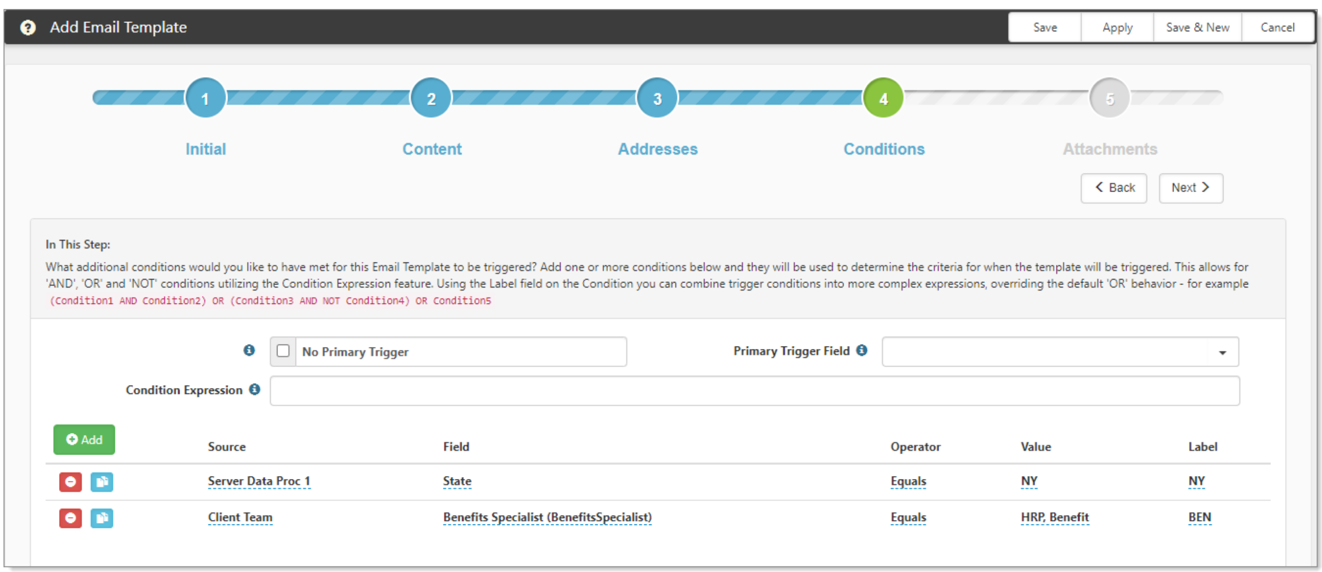
Email Address	Enter the from email address. This is the actual email address, such as `support@prismhr.com`.
From Friendly Name	Enter the friendly name that you want users to see, such as `PrismHR Support`.

4. Click **Ok**.

Step 4: Conditions

Conditions determine how and when the email notification triggers. You can configure display conditions (in the Add section), and you can use the display conditions in the Condition Expression field. When the Condition Expression field is empty, the display conditions process as ORs. In the example, the Condition Expression examines 1 **and** 2. Both conditions must be met. Without the Condition Expression, the display conditions process as 1 **or** 2. Only one of the conditions must be met. For a detailed explanation about conditions, see the topic Condition Expressions.

The following procedures guide you through configuring conditions. You can clone conditions and also set up a condition based on the number of days, months, or years from a date.



To configure conditions:

1. Complete the fields:

No Primary Trigger	When selected, no single condition must be met to trigger the email template. When selected, the **Primary Trigger Field** is disabled.
Primary Trigger Field	Optional. From the Triggering Form selected in Step 1, which, when changed, triggers the event. This can also be a HdrAction, such as a configured action link on the form. The following statements refer to the condition entries in the **Add** area. Condition entries are identified with a **Label** (the last column). • If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions. • If a Primary Trigger Field is not selected, only the conditions are evaluated. • If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND. • If no Condition Expression is used, the additional conditions are treated as OR conditions. The Primary Trigger Field only displays fields associated with the triggering dataform and includes the ability to Add Untriggered Field. **At this point, you can add a trigger field:** 1. In **Primary Trigger Field**, go to the end of the list and select **Add Untriggered Field**. The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as Triggerable. 2. In **Field**, select an entry. 3. Click **Ok**. The selected field is marked as triggerable and appears in the Primary Trigger Field list.

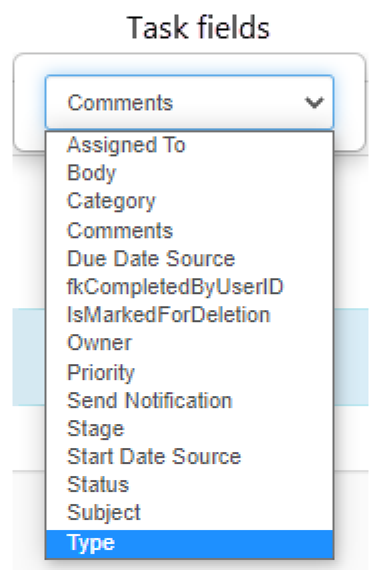
To add display conditions:

2. Click **Add**.
   A row opens with columns Source, Field, Operator, Value, and Label. The Add section is where you can add more granular triggering conditions. Each row you add is a display condition. When Condition Expression is empty, the display conditions process as ORs, meaning only one of the conditions must be met for the email notification to trigger.

<table>
<tr><td>Source</td><td>Source is the dataform or stored procedure that provides the triggering condition. Source includes all active, single forms and dataforms included in a tabbed set. Source aligns with Implementation Groups. For example, if you do not use risk functionality, then risk related dataforms are not presented in the list.
When you select Task as the Triggering Form in Step 1 Initial, in this step Source sets to Task.

HdrAction is only available when Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.</td></tr>
<tr><td>Field</td><td>Select the dataform or Stored Procedure field to compare to the trigger value.
A few notes:

Email Template triggering provides multi-lookup fields (Multi Lookup (MultiLookup)) as triggering conditions.
Field supports parent form fields (only available operators are empty, not empty, and dirty).
You can Add Untriggered Fields dynamically as well as current, active, triggerable fields from the Source.
When you select Task as the Triggering Form in Step 1 Initial, the options for Field include all task fields. For example, when you select Send Notification, and this option is enabled in the Task, then the email notification is triggered.



To add a trigger field:

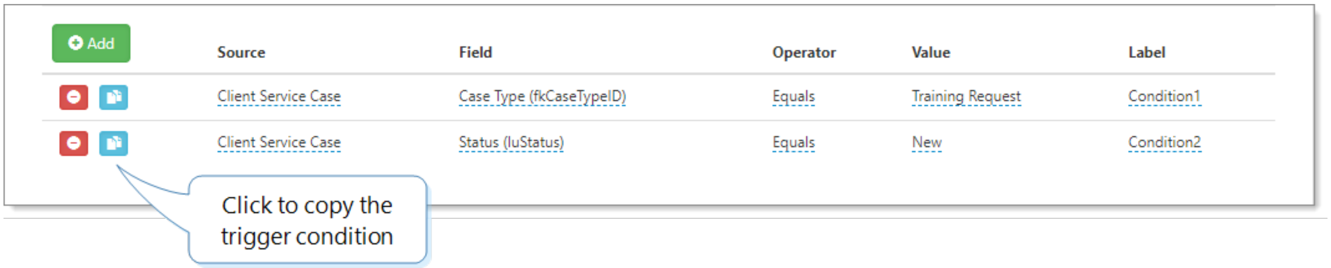
In Field, go to the end of the list and select Add Untriggered Field. The Select an Untriggered Field dialog opens. Field contains a list of fields currently not marked as Triggerable.
In Field, select an entry.
Click Ok.
</td></tr>
</table>

	The selected field is marked as triggerable and now appears in the Field list.
Operator	Choose the type of comparison. Each value from a Multi Lookup Trigger Field can be added as a separate "=" condition. This supports complex AND, OR, and NOT conditions as well. Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
Value	The criteria against which the trigger field is compared. For a condition that is using a user datatype as the Field, the Value field uses a typeahead[1] method so that you do not need to look up the User ID for the text field.
Label	The label to use when constructing Condition Expressions for triggering. Make this label short and representative of the Trigger Field. Labels are used in the Condition Expression field.
Condition Expression	Allows for **AND**, **OR**, and **NOT** conditions using the trigger conditions (Label) from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Condition Expressions adhere to AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions. When the Condition Expression field is empty, the row entries are treated as OR conditions. Only one of the conditions must be met.

To clone a trigger condition:

To save some time, you can clone a trigger condition and then edit as appropriate.

[1] As you type in the field, one or more matches for the term are found and immediately presented.



1. In the **Add** section, locate an entry that you want to copy.
2. Click **Clone**.
   A new row opens, with the trigger condition copied. Source, Field, and Operator are copied.
3. You can now edit the new condition as appropriate.
4. Click **Apply** or **Save**.

To trigger conditions based on number of days/months/years from a date:

3. Complete the form fields:

Field	Select a date datatype field. This action makes the Aging operators available in **Operator**.

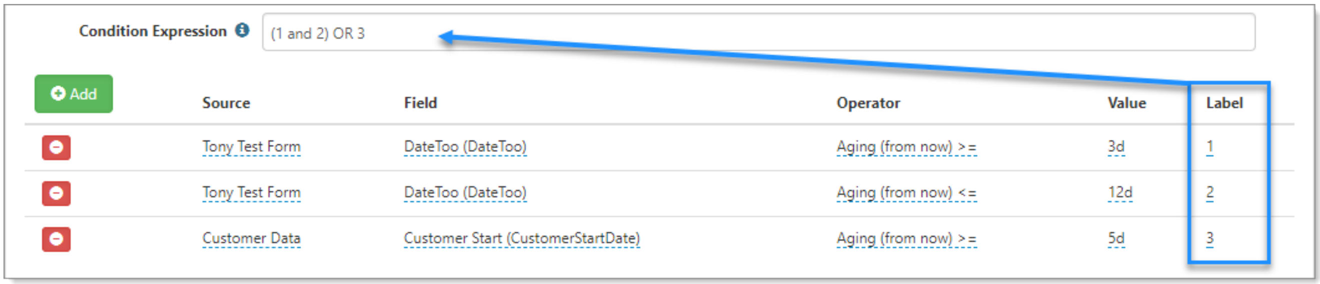
Operator	Select one of the following:
	• **Aging (from now) > =**
	  ◦ Greater than or equal to the number of days/months/years in **Value**.
	• **Aging (from now) < =**
	  ◦ Less than or equal to the number of days/months/years in **Value**.
	The less than operator requires that the evaluated date occurs between the calculated date and today. It has to be between the date set in the configuration. For example, if the value is 6d, the from date must be between 6 days ahead and today.

Value	Type a number accompanied by: • **d**: for days • **m**: for months • **y**: for years

4. Click **Apply** or **Save.**

Putting it all together

The following example illustrates three conditions named 1, 2, and 3. The Condition Expression is **(1 and 2) OR 3**. The OR indicates that only one data point must be met. For an aging evaluation, this condition expression is looking for a date that is greater than 3 days and less than 12 days. Or, a date that is greater than 5 days.


Condition Expression (1 and 2) OR 3

Add

	Source	Field	Operator	Value	Label
	Tony Test Form	DateToo (DateToo)	Aging (from now) >=	3d	1
	Tony Test Form	DateToo (DateToo)	Aging (from now) <=	12d	2
	Customer Data	Customer Start (CustomerStartDate)	Aging (from now) >=	5d	3

5. Click **Next** to proceed to Step 5: Attachments.

Condition Expressions

Condition expressions are used in email templates, workflow channels, widget layouts, and custom links. Condition expressions are used to control when an event or action is triggered.

Condition Expressions use Labels from Display Conditions along with AND, OR, and NOT operators to control precedence and sequence.

- The **AND** operator specifies that all specified conditions must be met for a query to return true. The AND is exclusive. AND narrows a search by telling the database that **all** keywords used must be found.
- The **OR** operator specifies that if one of two or more conditions is met, then the query is true. The OR only needs one data point to be present. OR broadens a search by telling the database that **any** of the words it connects are acceptable.
- The **NOT** operator allows you to exclude items that are not relevant to your search. NOT narrows your search by telling the database to **eliminate all terms that follow it**.

AND expressions

AND expressions are used when you want to include all conditions. For example, consider an expression that specifies that the month must be January and the day of the week must be a Monday **(January AND Monday)**. This expression specifies that all data points must be present; it is exclusive.

OR expressions

OR expressions are used when you want to find an overlap between items. For example, **(January OR Monday)** specifies that the day could be in January or could be a Monday of any month. This expression specifies that any data point can be present and is inclusive.

NOT expressions

NOT expressions are used when you are interested in a very specific list by letting you eliminate items that are not relevant. For example, (January NOT Monday) specifies that the day could be in January but cannot be a Monday.

Where to start

The first step in creating Condition Expressions is to determine your objective. A good place to start is with a flowchart using Yes and No logic. Determine the fields and values and whether the condition is to meet all conditions or just one data point. Next, determine how you want to group the criteria. You then must add the conditions (from within a form) and then determine how to group them using Condition Expressions. The remaining portion of this topic describes and illustrates how to compose Condition Expressions.

Before you can build a condition expression, you must first add the conditions from within a form such as Configure Data Links Details.

1. Add Display Conditions

For forms that offer conditions, when you click **Add** (lower portion of the form), a row opens where you can assign values to within fields such as Source, Field, Operator, Value, and Label (see the following image). The values must correspond to what is stored in the database. For example, lookups would be the Code value, and for parent form fields, such as Case Type, the value would be the ID of the form.

The following example illustrates two expressions, HOL1 and HOL2. These entries are Display Conditions. When the Condition Expression field is empty, the Display Conditions are processed as ORs. For example, in the following example, there is no Condition Expression. Therefore, HOL1 and HOL2 are processed as ORs. The result would be the match for each condition; it would be all-inclusive (WHERE Holiday Name = Christmas OR Holiday Name = New Year's Day).

2. Add a condition expression

But what if you want to treat the Display Condition statements differently? What if OR is not enough? You can use a Condition Expression by referencing the display condition statements (through Labels) and adding the AND and OR operators: (Cond1 AND Cond2) OR (Cond3). With a Condition Expression, you can control how many conditions you use and how they are used.

When building a Condition Expression, you use the condition Label value of the Display Conditions. You can create complex conditions by using unique combinations of the conditions. Condition Expressions can use AND as well as OR conditions.

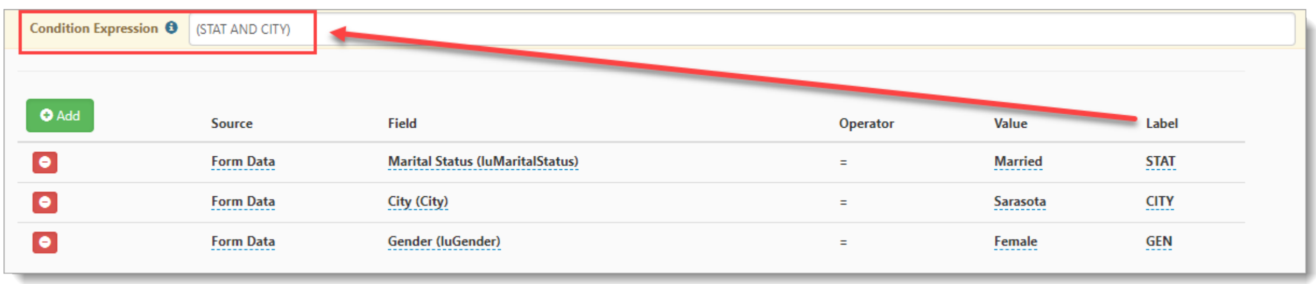
For example, to trigger a workflow when there is a new training request, the expression could be stated as **(CaseTypeTR AND CaseNEW)** where:

- CaseTypeTR: When case type = Training Request
- CaseNew: When case status = New

Using the Label field, you can combine trigger conditions into more complex expressions. For example: (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5.

The following example has three Display Conditions: STAT, CITY, GEN. Two of the three Labels are used in the Condition Expression.

- The (STAT AND CITY) Condition Expression is looking for employees who are married **and** reside in Sarasota. This result is exclusive.
- When the three separate conditions (STAT, CITY, GEN) are used **without** a Condition Expression, the search is for employees who are married, or reside in Sarasota, or are female. The result is inclusive.



Continue to the next topic, Order of operation.

Order of operation

The order of execution can significantly affect the resulting value. To control order and precedence you use parentheses to group functions. Everything within the parentheses is evaluated first to yield a single value before that value can be used by any operator outside the parentheses. If an expression has nested parentheses, the most deeply nested expression is evaluated first.

When a condition is met, the evaluation ends, using the results of the first successful condition. For (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5, if the first set (Condition1 AND Condition2) is met, then the remaining OR statements are ignored.

Note: You can only use Labels and the AND, NOT, and OR operators in your Condition Expression. The Condition Expression cannot contain SQL keywords.

Condition expression example

The following example illustrates multiple expressions for filtering attributes of a physical property (structure) and user rights:

- Is the property owner-occupied?
- Is the property located in one of the following states: Georgia, Alabama, Arizona?
- Is the property height in the number of stories greater than or equal to 5?
- Does the user have the security entity named biz_RequestTypeCategory_Envornmental?

Example

Each expression Label is brief and descriptive: OO, GA, AL, SECenv, 5PLUS, AZ.

Type	Description	Label
FieldValueExpression	gen_Property.OwnerOccupied Equals Yes	OO
FieldValueExpression	gen_Property.State Equals GA	GA
FieldValueExpression	gen_Property.State Equals AL	AL
SecurityEntity	Security Entity Equals biz_RequestTypeCategory_Environmental	SECenv
FieldValueExpression	gen_Property.NumOfStories Greater Than or Equal 5	5PLUS
FieldValueExpression	gen_Property.State2 Equals AZ	AZ

Condition expression example

The Labels are used in the Condition Expression along with the AND and OR operators. Additionally, grouping and nesting control the evaluation.

The following example has two major groupings delineated by sets of parentheses. Within each major group, there is a sub-group, also delineated by a set of parentheses.

(OO AND (GA OR AL)) OR (SECenv AND (5PLUS AND AZ))

First group - the AND	**Parentheses and groupings**
The first grouping has two sets of parentheses: • The first group specifies owner-occupied as OO. You need a set of parentheses for OO. Sub-groups are placed inside the parentheses of the major group.	**(OO** AND (GA OR AL)**)**
• Within the owner-occupied group, the location must be GA or AL. You need a second set of parentheses for the locations GA and AL.	(OO AND **(GA OR AL)**)
Second group - the OR	
The second grouping has two sets of parentheses: • The first group is SECenv. You need a set of parentheses for this major group.	**(SECenv** AND (5PLUS AND AZ)**)**
• The second group is the number of stories and location. Place the sub-group within a set of parentheses.	(SECenv AND **(5PLUS AND AZ)**)

The following diagram explains how the sample condition expression is evaluated.

The first condition grouping, is looking for two things:
1. Owner occupied
2. Specific locations

(OO **AND** (GA **OR** AL))

1. Must be owner occupied

2. Must be in GA or AL. The OR portion is to distinguish a location. Therefore, you need the inner set of parentheses.

If the **AND** and **OR** conditions are met for owner-occupied and location, the process ends. Else, the next grouping is processed, the OR portion.

The OR portion of the expression is processed ONLY if the first portion does not return results.

The second condition group is looking for three things:
1. Specific level of view rights
2. Location
3. Number of stories.

OR

(SECenv **AND** (5PLUS **AND** AZ))

1. Must have at least view rights

2. Must have at least 5 stories
3. Must be in AZ
The AND portion is to distinguish a location with 5 stories. Therefore, you need the inner set of parentheses.

The two **AND**s specify that all conditions must be met: view rights, number of stories, and location.

Result

For the expression **(OO AND (GA OR AL)) OR (SECenv AND (5PLUS AND AZ))**

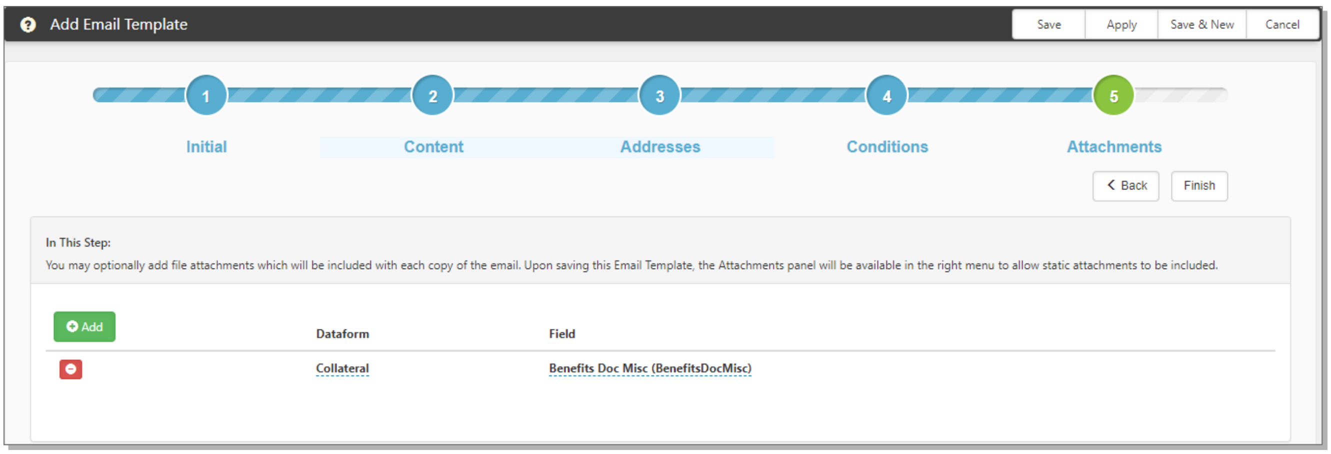
- If the property is owner-occupied and is located in Georgia or Alabama, then the evaluation ends because the condition has been met. The OR portion is ignored.
- However, if there are no properties that are owner-occupied in either Georgia or Alabama, then the OR expression is evaluated. The OR portion looks for:
  - user view rights to RequestTypeCategory_Environmental
  - **and** the property must be in Arizona with a minimum height of 5 stories

Summary

The examples provided in this topic use nested groupings along with the AND and OR operators. Keep in mind that your needs may vary. Additionally, plan ahead. Determine your Display Conditions and use brief Labels. After you have defined your Display Conditions, then you are ready to compose the Condition Expression.

Step 5: Attachments

At this step, you can add attachments to the email template for all recipients. When you add attachments to System email templates with a prefix CSCRPLY (Case Discussion Replies), the attachment is available to all recipients. For example, you might have a template named CSCRPLYPayrollProblem for a generic payroll form that an employee or manager must complete. Attaching the form to the template saves time and streamlines the process.



To complete the Attachments step:

1. Click **Add** to begin adding the attachments.
   A row opens with Dataform and Field.

Dataform	Select the dataform from with the attachment will be copied.
Field	Select the Field from the dataform.

2. To add static attachments, from the right pane, click **Attachments** > **✚ Upload File**.
   The Upload File dialog box opens.
3. Click **Choose File**.
   File Explorer opens.

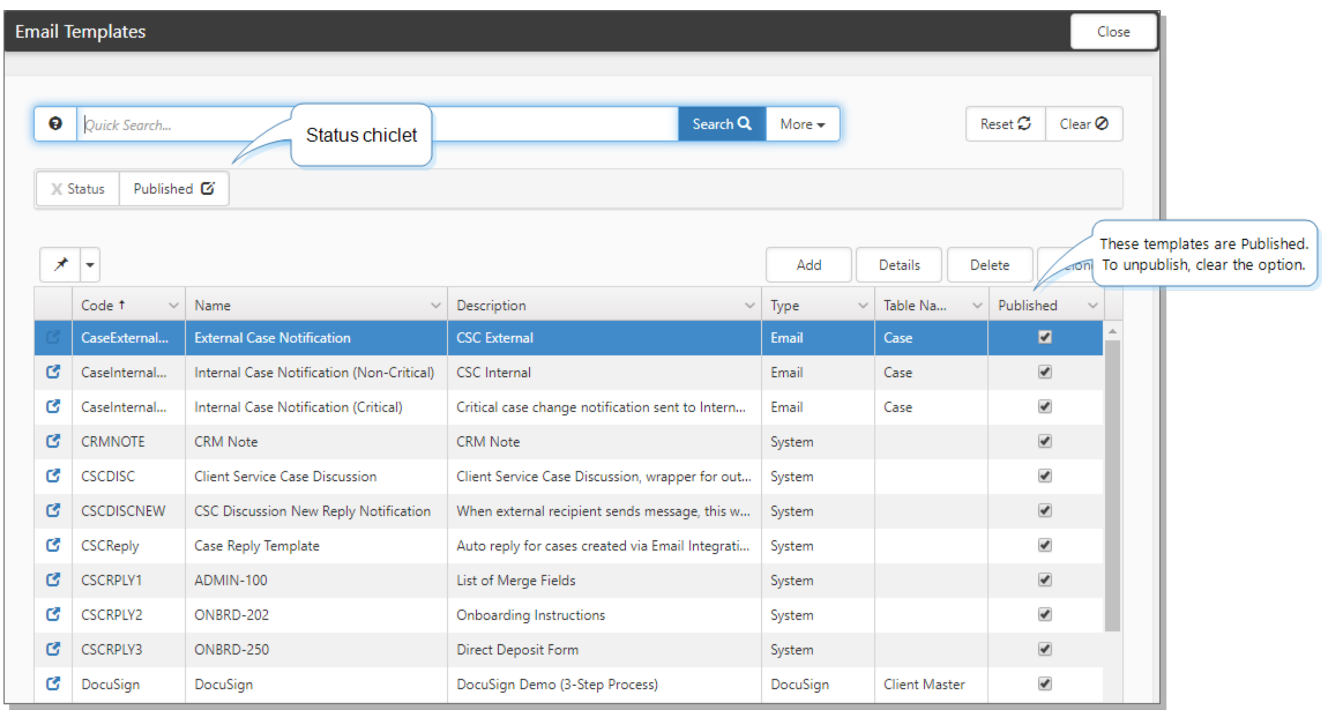
4. Locate the file and click **Open**.
   You are returned to the Upload File dialog box.
5. Optionally, you can provide Description, Category, and Tags information.
6. Click **Save**.
7. Click **Finish** to complete your email template configuration.

Continue to the next topic, What's next.

What's next

What's next in configuring Email Templates?

1. When you click **Finish**, you receive a prompt "This email template is currently unpublished. Would you like to publish?"
   - **Yes**: returns you to the Email Templates list, with the Published view. Your new email template is displayed in the Published list at the bottom.
   - **No**: returns you to the Email Templates list. You can view your unpublished item by toggling the Status chiclet to Unpublished.



2. To publish your unpublished email template, select the **Published** option. See Viewing and publishing email templates.
3. To unpublish a template, from the Email Templates list, clear the **Published** option.

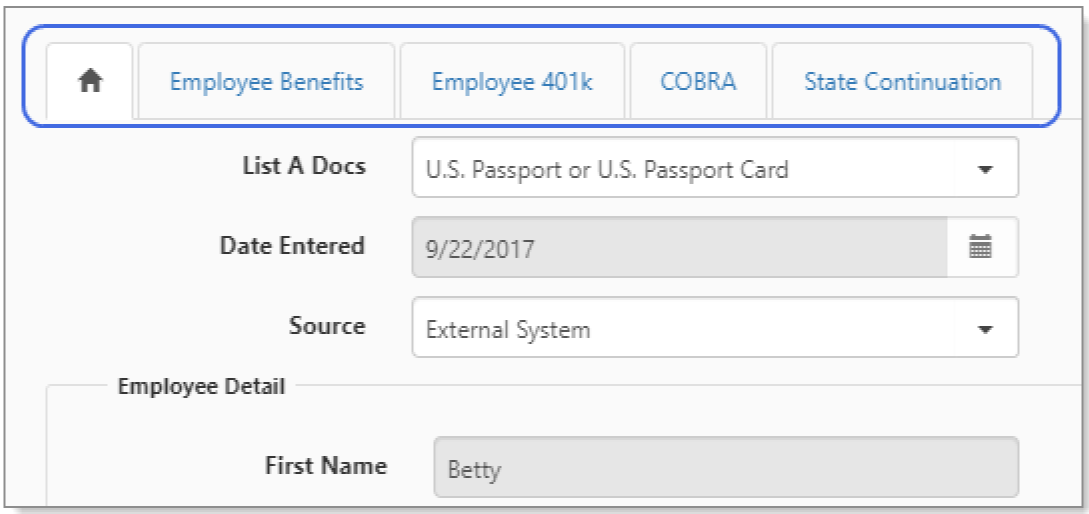
4. Click **Search** to refresh the list.

Learning how: Email Template overview

To learn more about Email Templates, Watch this video.

Sending notifications using tabbed dataforms

Tabbed dataforms comprise a parent (home form) and child forms, which are extensions of the parent. Here is an example of the Employee dataform with four tabs: Employee Benefits, Employee 401k, COBRA, and State Continuation. This is a tabbed set of dataforms.



When sending notifications using email templates, you have options to include fields from a tabbed set:

- On the Addresses step
- On the Conditions step

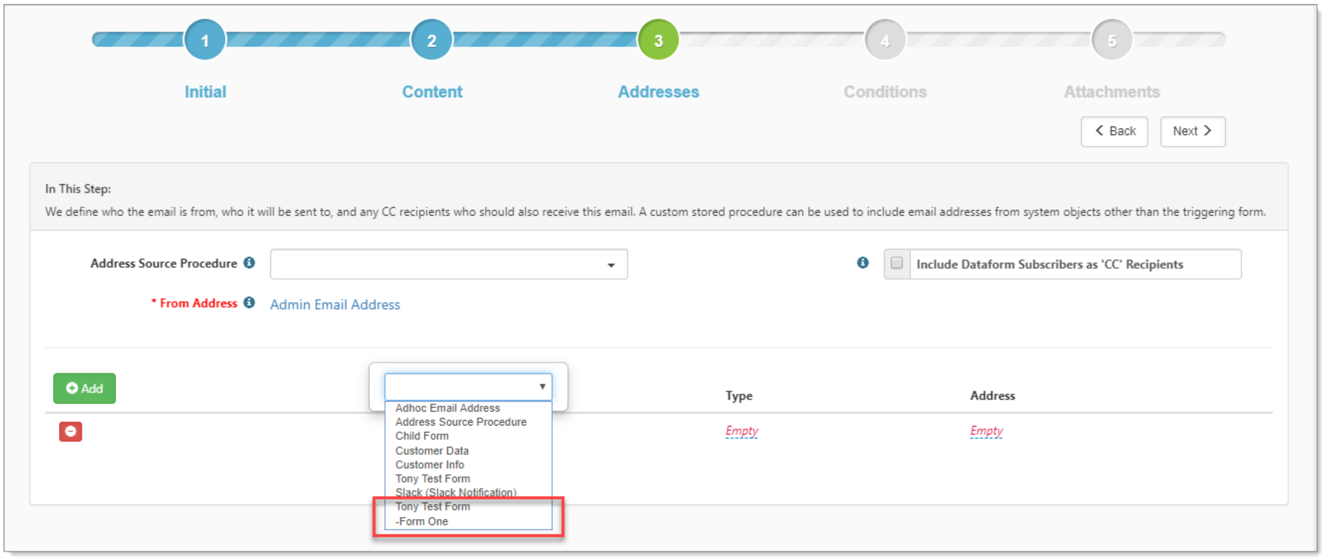
On the Addresses step

On the Addresses step, when adding a new address in the **Source** list, the recipient source can be:

- The triggering dataform selected in Step 1 Initial
- Tabbed dataforms that are children of the triggering dataform
- Ad-Hoc email address that you type in the Address field
- Or an email address selected from the Address Source Procedure. This option only appears if an Address Source Procedure has been selected.

Tabbed dataforms

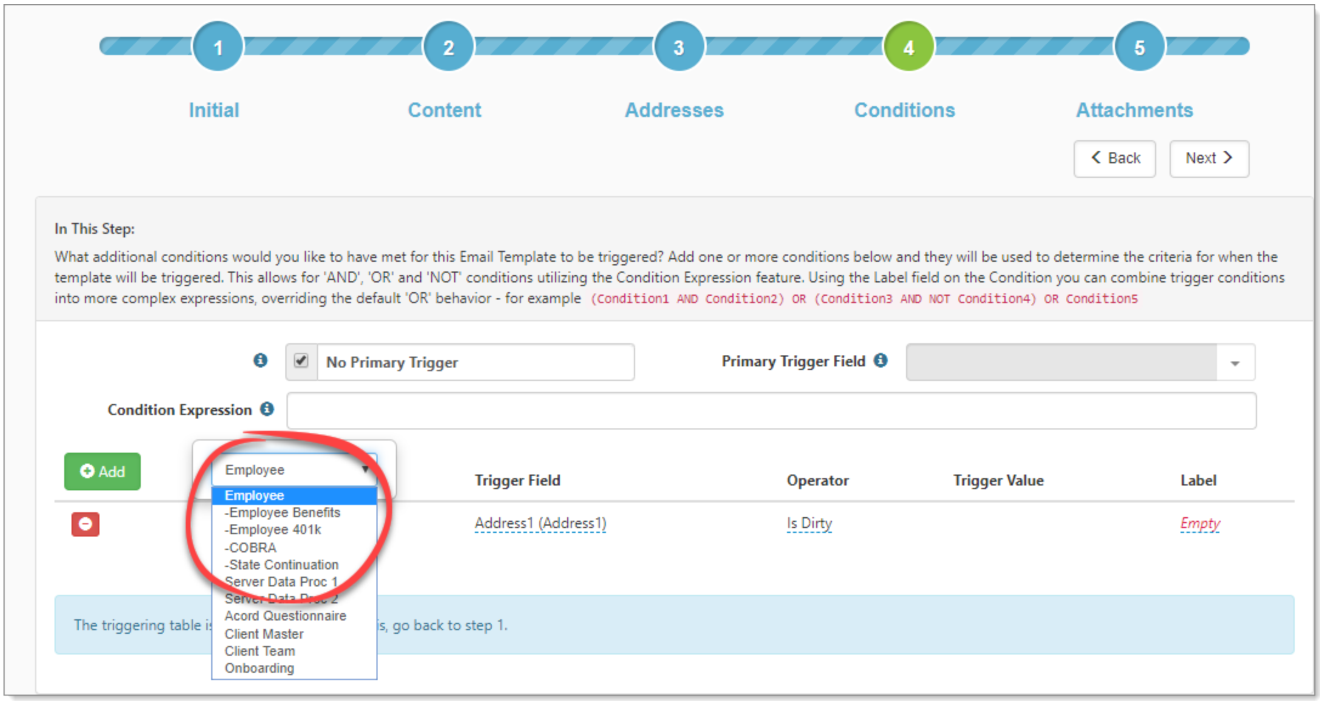
In the Source column, when a tabbed dataform is selected, the Address field displays a selector for user and email type fields that are on the dataform from the tabbed set. The Source list includes all tabbed forms included in the tabbed set. The tabbed dataforms appear immediately after the triggering form in the list and are preceded by a dash (–). The example shows `–Form One`, which is a child dataform of the parent, `Tony Test Form`.



On the Conditions step

Items in the Add section denote more granular triggering conditions. For Field Source, you can choose all active child dataforms included in the tabbed set when the triggering form (Table Name selected in Step 1 Initial) is the parent form.

In the example, `Employee` is the parent form. The child forms display immediately after the parent. The child dataform names are prepended with a dash (–): `–Employee Benefits`, `–Employee 401k`, `–COBRA`, `–State Continuation`.



Viewing and publishing email templates

Email templates can be viewed and published by global administrators.

To view email templates:

1. Go to **System Admin** ⚙ > **Email Templates**.
   The Email Templates dashboard opens.
2. From the Email Templates list, you can do the following:

Action	Description
Add	To add an email template, click **Add**. See Configuring Email Templates.
Details	To view details about an email template, click **Details**.
Delete	To delete the selected email template, click **Delete**.
Clone	To clone an email template, click **Clone**.
Publish and Unpublish	When selected, the **Published** column indicates the email template is published. • To unpublish the email template, clear the **Published** option.

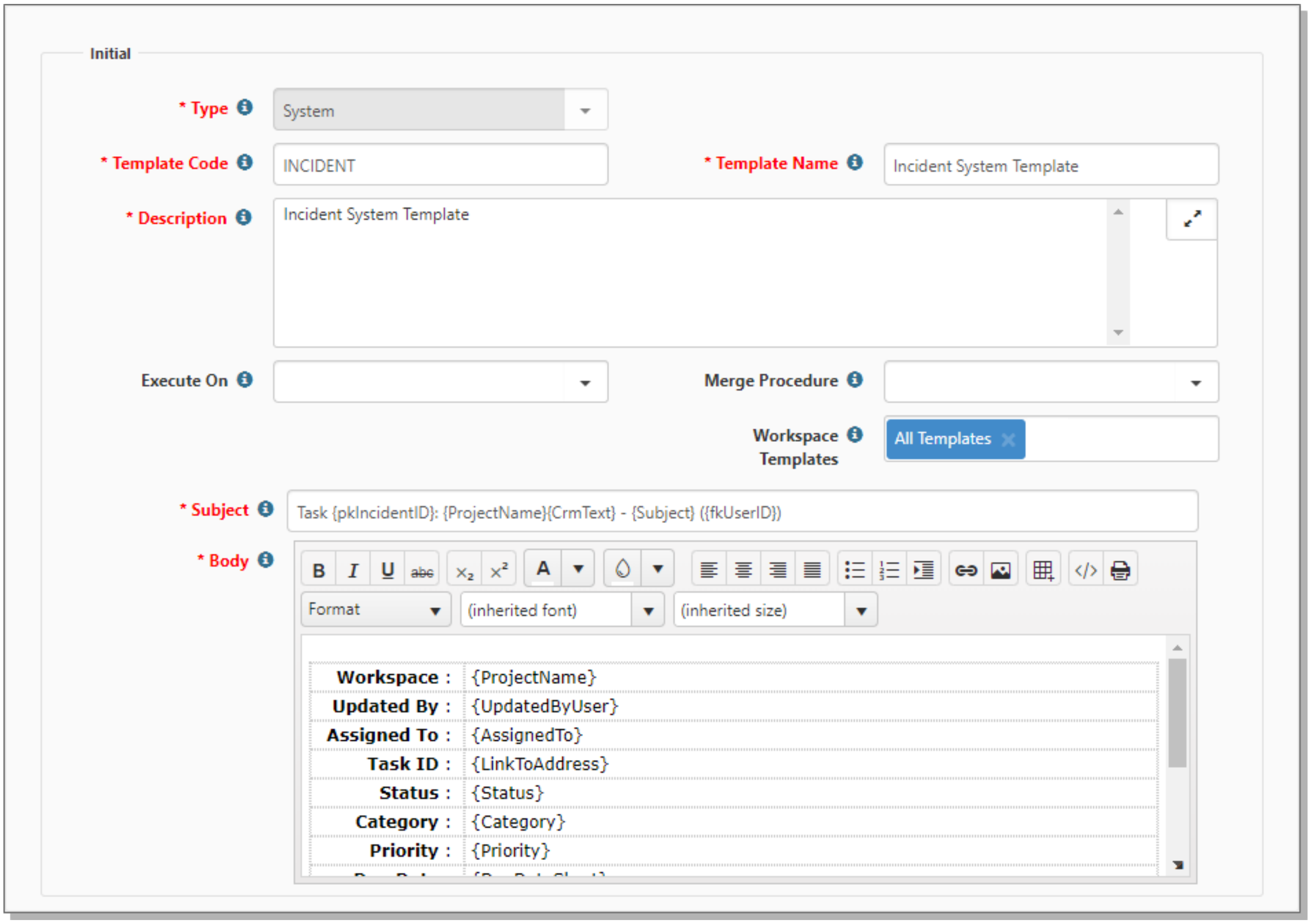
Action	Description
	• To publish an unpublished email template, select the **Published** option.
View Published and Unpublished Email Templates	By default, the **Status** chiclet is set to **Published**. **To toggle the Status:** 1. Click the **Status** chiclet **Published**. The More dialog opens. 2. Select a **Status**: All, Published, Unpublished. 3. Click **Search**. The Email Templates list is displayed according to your selection. Unpublished email templates are displayed in italics and bold. Published entries display as normal and have the Published column selected. 4. You can also click the **X** beside **Status Published**. This action displays all email templates: published and unpublished. 5. To reset the view back to Published, click **Reset**.

Sending task notifications through Email Templates

System administrators can produce task notifications through email templates, enabling flexibility for messaging and branding. These email templates are **System** email templates. Task notifications include System Email Template with the code value INCIDENT. If the INCIDENT template does not exist, ClientSpace uses the original notification style. For emails generated from the INCIDENT template, the Email Admin dashboard displays TaskSystemEmailTemplate in the Source column (otherwise displays Task).

System Email Templates include:

- The System Email Template for Incidents contains the Task Comments field (The Comments field is not included in the fields that changed list).
- On creation of a new Task, the Updated By User replace field populates.



Note: By default, ClientSpace provides an INCIDENT Email Template.

To create a System Email Template for task notifications:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Click **Add**.
   The Add Email Template form opens.
3. Complete the form.
   For Type, select **System**.

Type	For **Email** notifications: • Select **Email**. For **Task Notifications**:

<table>
<tr><td></td><td>Select System.
For DocuSign:
Select DocuSign.
For Case Discussion Replies:
Select System.
Type options include:
Email: Default value.
DocuSign: For DocuSign Email Templates only. When select DocuSign, it enables the API Configuration field for the login and connection record.
System: For system-level templates. Use System to configure Case Discussion Replies. This type is designed for dataform and system notifications. When System is selected, additional fields are enabled, and the workflow steps are not displayed.
Subject line of the email generated by this template. Available when the type is System.
Body is used to generate the body of the email. Use the rich text controls for formatting items such as font and background color. Field replacement can also be used to insert application data. Available when the type is System.</td></tr>
<tr><td>Template Code</td><td>Type code value INCIDENT.</td></tr>
<tr><td>Template Name</td><td>Provide a short, descriptive name for your template. Displays in the email template list.</td></tr>
<tr><td>Description</td><td>Provide a useful description of the email template.</td></tr>
<tr><td>Execute On</td><td>Will this email be sent the first time the form is saved (Insert), only when the form is changed (Update), or every time (Insert or Update)? When there are changes to the dataform that you selected in Triggering Form, the Execute On value controls triggering for Insert, Update, or both Insert and Update.</td></tr>
<tr><td>Merge Procedure</td><td>Select an optional Merge Procedure here to provide additional system</td></tr>
</table>

	information for field replacement. The procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_merge_proc**. Merge Procedure[1] also determines the fields that are available to use in field replacement.
Workspace Templates	Select the Workspace Templates[1] to receive this email.
Include as Activity	Select this option to attach the email as an Activity. When the email is triggered, the email message attaches to the triggering record. This action preserves the communication of the sent email. Default: The option is cleared, do not include as an Activity.

4. Click **Save**.

Adding attachments

Email Templates can have attachments that are included with the email when it is sent. Email Templates can have two different attachments:

- Attach file using a file field on a dataform. If there is a file housed in the dataform field, then you can attach the file.
- Attach a desktop file from the Attachment panel, using Upload File after the template is saved.

To add an attachment from a dataform:

1. While adding an Email Template, in **Step 5 Attachments**, click **Add**.
2. Select the **Dataform** from which the attachment will be copied.
3. Select the **Field** from the dataform selected previously that holds the attachment to be copied.
4. Click **Finish** to complete your email template configuration.

To add an attachment to a saved email template:

1. Go to **System Admin** ⚙ > **Email Templates**.
   The Email Templates dashboard opens showing a list of published Email Templates.

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[1]A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

[1]Workspace Templates are special workspaces used for cloning during the Workspace creation process. In this way, ClientSpace allows you to set up multiple workspace configurations (such as an industry-specific Workspaces with a specific, limited list of TOC items) then choose how you want the workspace to look and feel by selecting the appropriate template during workspace creation.

2. Open an Email Template.
3. Expand the **Attachments** panel (on the right).
4. Click **Upload File**.
   The Upload File dialog box opens.
5. Click **Choose File**.
   The Open dialog box opens.
6. Locate and select the file and click **Open**.
   You are returned to the Upload File dialog, with the file name displayed in File.
7. Click **Save**.

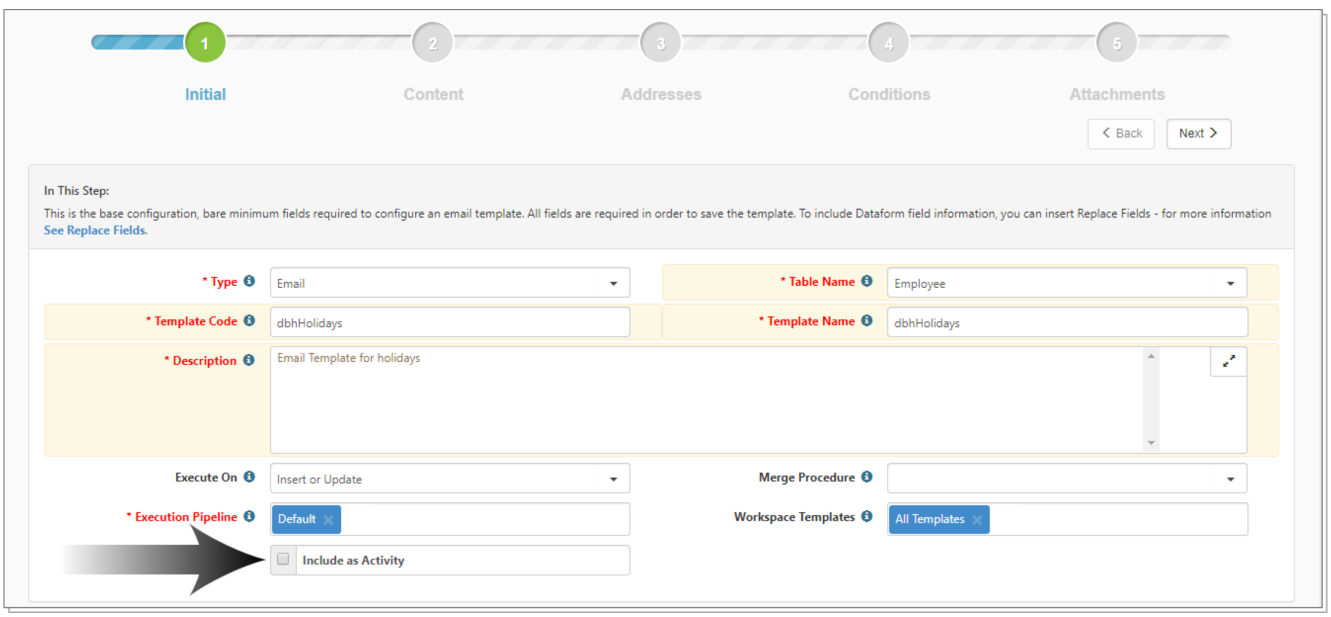
The selected file now displays in the Attachments panel.

Attaching Activities from Email Templates

You can attach email messages sent from a trigger on a dataform as Activities. The email message attaches at the time the email triggers and is attached to the triggering record.

To attach Activities:

1. Open an email template.
2. On the **Initial** step, select the option **Include as Activity**.



3. Click **Save**.

The email message attaches at the time the email triggers. The email message is attached to the triggering record and appears in the Activities panel, in the Action Center.

Triggering Email Templates from Tasks

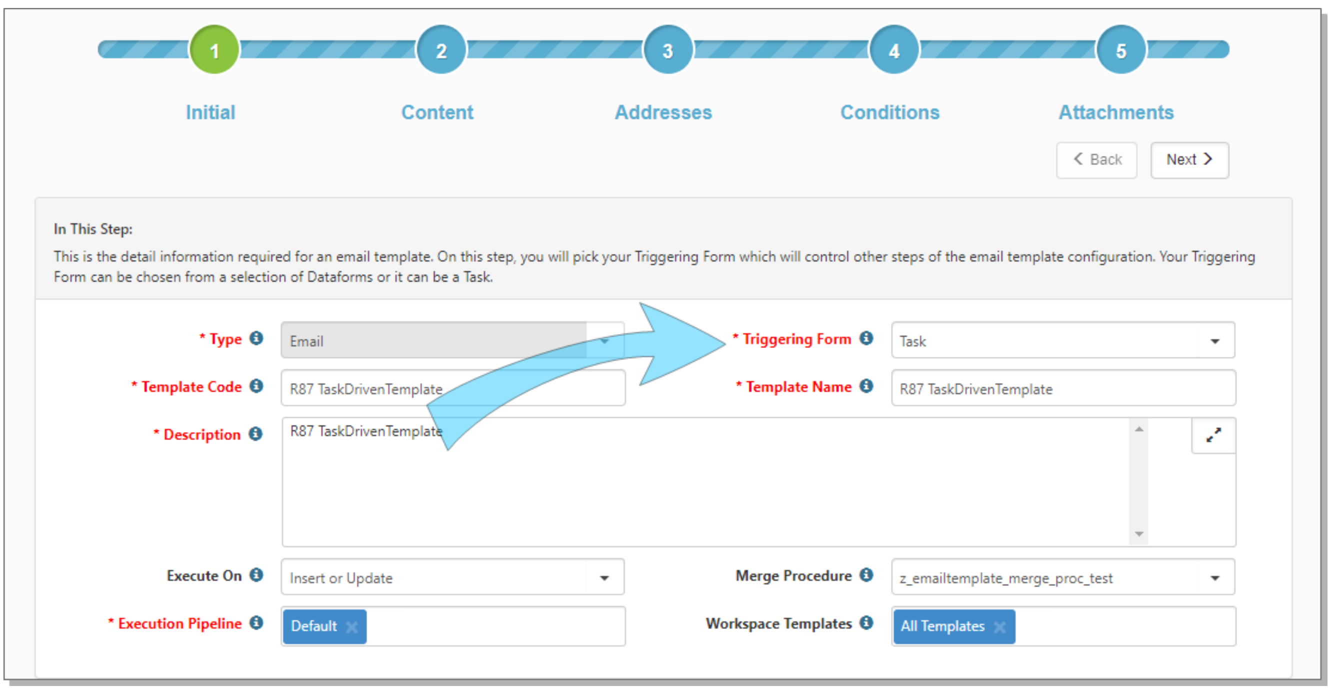
System administrators can trigger email templates from saved tasks. This functionality enables system admins to control the conditions by tailoring the task email templates. For example, you might configure an email template for any updates to a Task and a separate email template for when a Task is marked as closed.

When you set Triggering Form to **Task**:

- Task and associated fields are available for field replacement in Step 2 Content.
- Task and associated fields are available from Step 4 Conditions for use as triggering conditions.

Step 1 Initial

This is the detail information of your email template. When the Triggering Form for an Email Template is Task, ClientSpace does not expose the Include as Activity option in Step 1 because you cannot add Activities to Tasks.



To trigger an email from a Task:

1. Complete the form fields:

Type	For **Email** notifications: • Select **Email**. For **Task Notifications**: • Select System. For **DocuSign**: • Select DocuSign. For **Case Discussion Replies**: • Select System. Type options include: ■ **Email**: Default value. ■ **DocuSign**: For DocuSign Email Templates only. When select DocuSign, it enables the API Configuration field for the login and connection record. ■ **System**: For system-level templates. Use **System** to configure Case Discussion Replies. This type is designed for dataform and system notifications. When System is selected, additional fields are enabled, and the workflow steps are not displayed. ◦ **Subject** line of the email generated by this template. Available when the type is System. ◦ **Body** is used to generate the body of the email. Use the rich text controls for formatting items such as font and background color. Field replacement can also be used to insert application data. Available when the type is System.
Triggering Form	Select **Task**. Your selection in the Triggering Form field is the dataform or table where the trigger resides (a field change, a value change). The change to the dataform or table is what triggers the email. Triggering Form is used synonymously with a database table or a dataform[1]. When you set Triggering Form to **Task**, this action makes any associated

[1]Dataforms dynamically create and manage configurable data collection points. When you add a dataform, a new table is added to the database. Dataforms enable workflow systemization.

	Task fields available on Step 4 Conditions for use as triggering conditions. Task and associated fields are also available for field replacement. See Triggering Email Templates from Tasks. **To add a dataform that is not in the list:** 1. In the **Triggering Form** field, go to the end of the list and select **Add Untriggered Form**. The Select an Untriggered Form dialog box opens. Table Name contains a list of all dataforms currently not marked as Triggerable. 2. In **Table Name**, select a dataform from the list. 3. Click **Ok**. The selected dataform is marked as triggerable and now appears in the Triggering Form list.
Template Code	Must be unique and should be related to the purpose of the email template.
Template Name	Provide a short, descriptive name for your template. Displays in the email template list.
Description	Provide a useful description of the email template.
Execute On	Will this email be sent the first time the form is saved (**Insert**), only when the form is changed (**Update**), or every time (**Insert or Update**)? When there are changes to the dataform that you selected in Triggering Form, the Execute On value controls triggering for Insert, Update, or both Insert and Update.
Merge Procedure	Select an optional Merge Procedure here to provide additional system information for field replacement. The procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_merge_proc**. Merge Procedure[1] also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines[1] using a multi-select.

[1]A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

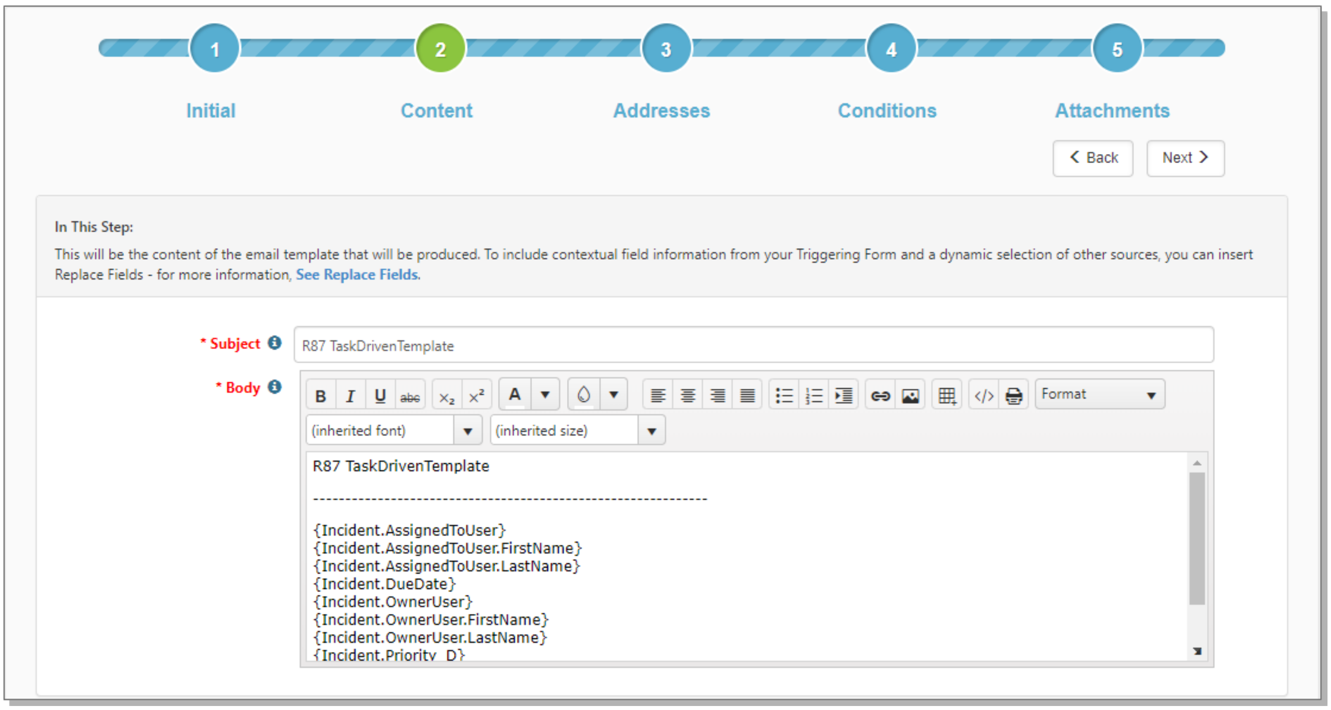
[1]A pipleline determines which rules are applied when the data is saved.

	This allows you to create a single email template that can apply to multiple execution pipelines. Select the pipelines on which the email triggering is to occur.
Workspace Templates	Select the Workspace Templates[1] to receive this email.

2. Click **Next** to proceed to Step 2 Content.

Step 2 Content

This is the content of the email template. To include contextual field information from a Task, (your Triggering Form in Step 1), you can use replacement fields.



To configure the content of the email:

1. Provide a **Subject** line of the email to be generated.
2. Provide the email message in the **Body**.

---

[1]Workspace Templates are special workspaces used for cloning during the Workspace creation process. In this way, ClientSpace allows you to set up multiple workspace configurations (such as an industry-specific Workspaces with a specific, limited list of TOC items) then choose how you want the workspace to look and feel by selecting the appropriate template during workspace creation.

This field uses a rich text editor and supports font styling, embedded images, hyperlinks, and so on.

3. Click **See Replace Fields** to select items to copy to the clipboard.
   You can paste items in Subject and Body as applicable. See Replacement Fields.

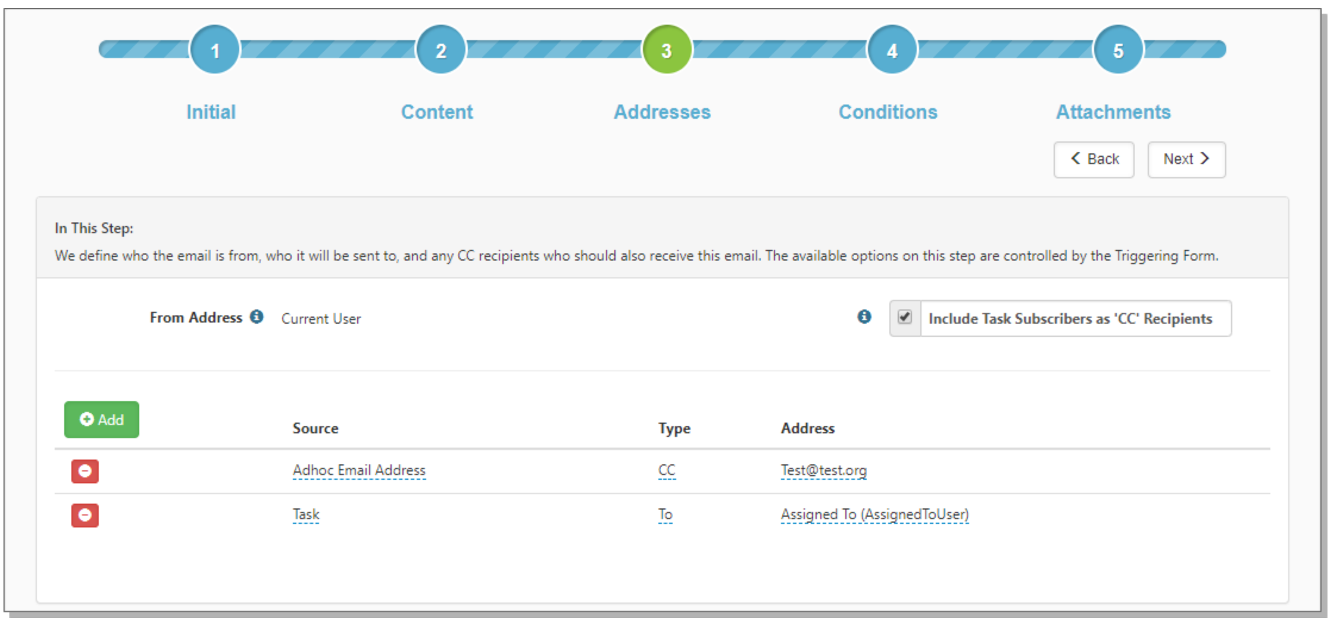
   Field replacement includes:

   - When you select Task as the Triggering Form in Step 1 Initial, Task fields are available for field replacement
   - The active fields from the related Organization and Org Other Info
   - Any fields returned by the Server Data Procs related to the triggering dataform

4. Click **Next** to proceed to Step 3 Addresses.

Step 3 Addresses

In this step you define who the email is from, who it will be sent to, and any CC recipients. The available options on this step are controlled by the Triggering Form. When the Triggering Form is **Task** (Step 1 Initial), then Source options are Adhoc Email Address and Task. Anyone who is currently marked as a Notification user on the triggering Task, is included as a subscriber.



To configure Addresses:

1. Complete the form fields:

Field	Description
From Address	This field is set to Current User. For Task, only the person performing the action displays as the task From Address.
Include Task Subscribers as CC Recipients	When this option is selected, it includes anyone who is currently marked as a Notification user on the triggering Task.

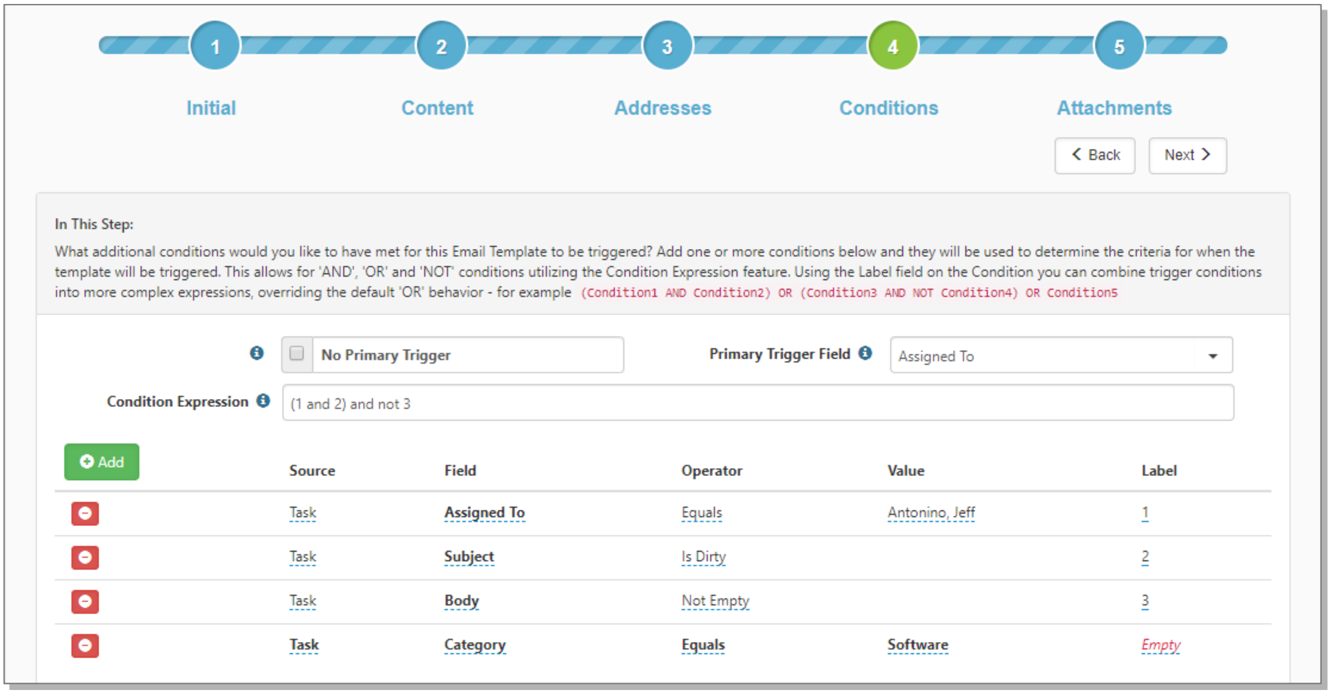
2. To add Addresses, click **Add**.
   A row opens to add recipients to the notification.

Source	The Source list includes: • Ad-Hoc Email Address: When you select this option, type an email address in the Address column. • Task: When you select this option, User fields are available for selection in the Address column, such Assigned To.
Type	What kind of email recipient type are you setting? Options are **To** or **CC**.
Address	Use this field to manually type an email address to use every time.

3. Click **Next** to proceed to Step 4 Conditions.

Step 4 Conditions

In this step you can specify Task fields in the Field column. When Task is the Triggering Form (from Step 1 Initial), Source is set to Task. Available options for Field are any of the Task fields.



To add conditions:

1. Complete the form fields:

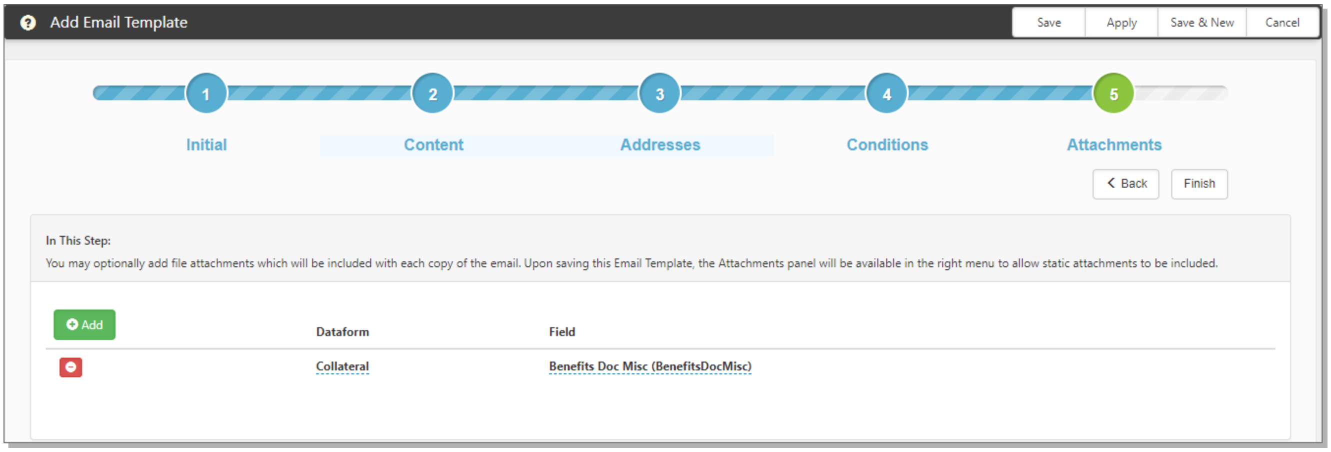
No Primary Trigger	When selected, no single condition must be met to trigger the email template. If this field is selected, the **Primary Trigger Field** is disabled.
Primary Trigger Field	Optional field (from the Triggering Form selected in Step 1), which, when changed triggers the event. The following statements refer to the condition entries in the **Add** area. Condition entries are identified with a **Label** (the last column). • If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions. • If a Primary Trigger Field is not selected, only the conditions are evaluated. • If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND. • If no Condition Expression is used, the additional conditions are treated as OR conditions.
Condition Expression	Condition Expressions use Labels from the display conditions along

	with AND, OR, and NOT operators to control precedence and sequence. The Add section is where you can add more granular triggering conditions. Entries in this section are called display conditions. If the Condition Expression field is empty, then the entries under Add are treated as OR conditions. Allows for **AND**, **OR**, and **NOT** conditions using the display conditions (Label) from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Condition Expressions adhere to AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions.
Source	When you select **Task** as the Triggering Form in Step 1 Initial, Source is set to **Task**.
Field	When you select **Task** as the Triggering Form in Step 1 Initial, the options for Field include all task fields.
Operator	Choose the type of comparison. Each value from a multi-lookup Field can be added as a separate "=" condition. This supports complex AND, OR, and NOT conditions as well.
Value	The criteria against which the trigger field is compared. The Value corresponds to the Field of the Task. For example, if you select Assigned To for Field, then select a user for the Value.
Label	The label to use when constructing Condition Expressions for triggering. Make this label short and representative of the Field. Labels are used in the Condition Expression field.

2. Click **Next** to proceed to the next step.

Step 5 Attachments

You can add attachments at this step to be included with each copy of the email sent. Static attachments can be included through the Attachments panel. Recipients receive any attachments added from the Attachment panel when the template is triggered.



To complete the Attachments step:

1. Click **Add** to begin adding the attachments.
2. Select the **Dataform** from which the attachment will be copied.
3. Select the **Field** from the dataform selected previously that holds the dataform to be copied.
   A panel displays on the right for adding attachments.
4. To add static attachments, click **Attachments** and ✚ (Upload File).
   The Upload File dialog box opens.
5. Click **Choose File** to locate the file.
6. Click **Save**.
7. Click **Finish** to complete your email template configuration.

Triggering Email Templates from Org fields

System administrators can trigger an Email Template from fields on the Org record. Organization is available for triggering as:

- Triggering Form: Can select Organization as the Triggering Form.
- Field replacement: Contains Organization field level information (with proper field configuration)
- Fields as Primary Trigger Condition
- Fields as additional Conditions

Note: Before configuring an email template from the Organization, please log an Extranet case to ensure proper table setup is in place.

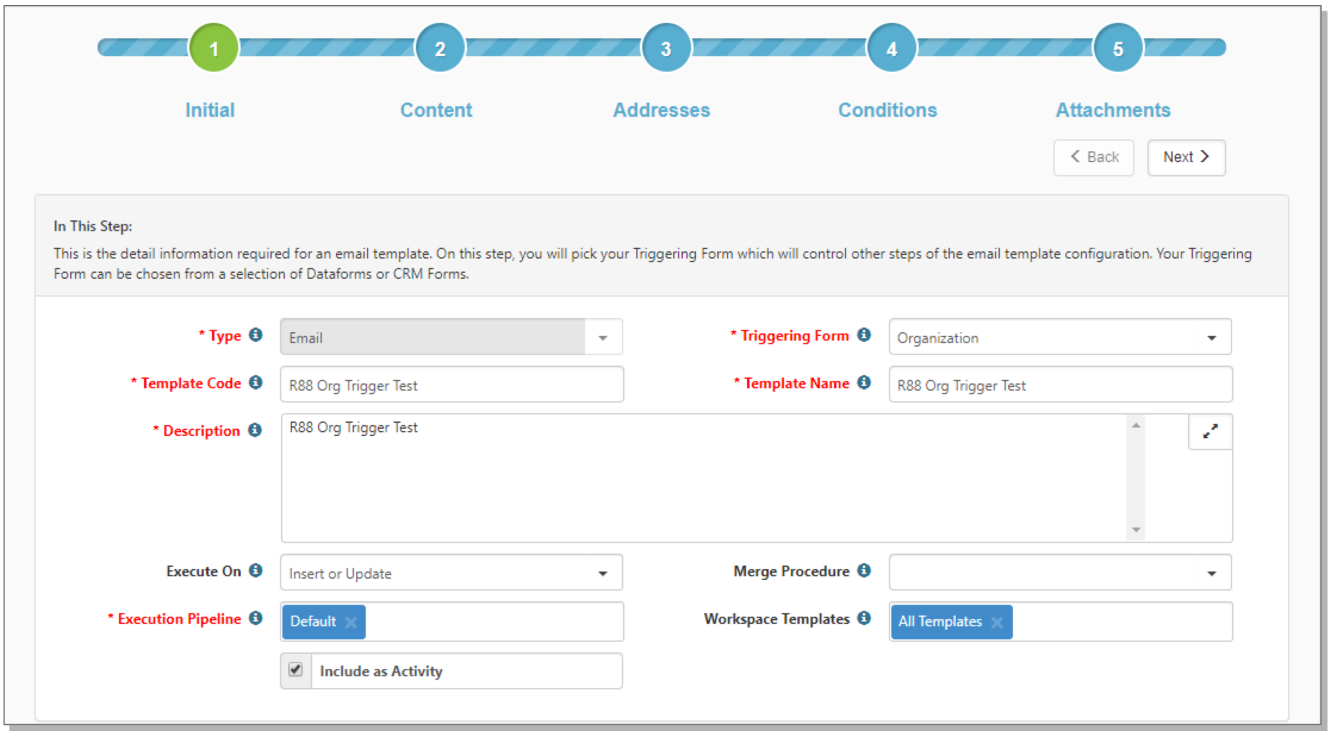
When you set Triggering Form to **Organization**:

- Associated fields are available for field replacement in Step 2 Content.

- Associated fields are available for recipient assignment on Step 3 Addresses.
- Associated fields are available for Field in Step 4 Conditions for use s Primary triggers (field has changed) or as additional triggering conditions and support complex Condition expressions (with proper field configuration).

Step 1 Initial

In Step 1, you provide detail information for your email template.



To trigger an email from Organization fields:

1. Complete the form fields:

Type	For **Email** notifications: • Select **Email**. For **Task Notifications**: • Select System. For **DocuSign**: • Select DocuSign.

	For **Case Discussion Replies**:
	• Select System.
	
	Type options include:
	▪ **Email**: Default value.
	▪ **DocuSign**: For DocuSign Email Templates only. When select DocuSign, it enables the API Configuration field for the login and connection record.
	▪ **System**: For system-level templates. Use **System** to configure Case Discussion Replies. This type is designed for dataform and system notifications. When System is selected, additional fields are enabled, and the workflow steps are not displayed.
	  ◦ **Subject** line of the email generated by this template. Available when the type is System.
	  ◦ **Body** is used to generate the body of the email. Use the rich text controls for formatting items such as font and background color. Field replacement can also be used to insert application data. Available when the type is System.

Triggering Form	Select **Organization**. Your selection in the Triggering Form field is the dataform or table where the trigger resides (a field change, a value change). The change to the dataform or table is what triggers the email. Triggering Form is used synonymously with a database table or a dataform[1].
Template Code	Must be unique and should be related to the purpose of the email template.
Template Name	Provide a short, descriptive name for your template. Displays in the email template list.
Description	Provide a useful description of the email template.
Execute On	Will this email be sent the first time the form is saved (**Insert**), only when the form is changed (**Update**), or every time (**Insert or Update**)?

[1]Dataforms dynamically create and manage configurable data collection points. When you add a data-form, a new table is added to the database. Dataforms enable workflow systemization.

	When there are changes to the dataform that you selected in Triggering Form, the Execute On value controls triggering for Insert, Update, or both Insert and Update.
Merge Procedure	Select an optional Merge Procedure here to provide additional system information for field replacement. The procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_merge_proc**. Merge Procedure[1] also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines[1] using a multi-select. This allows you to create a single email template that can apply to multiple execution pipelines. Select the pipelines on which the email triggering is to occur.
Workspace Templates	Select the Workspace Templates[1] to receive this email.
Include as Activity	Select this option to attach the email as an Activity. When the email is triggered, the email message attaches to the triggering record. This action preserves the communication of the sent email. Default: the option is cleared, do not include as an Activity.

2. Click **Next** to proceed to Step 2 Content.

Step 2 Content

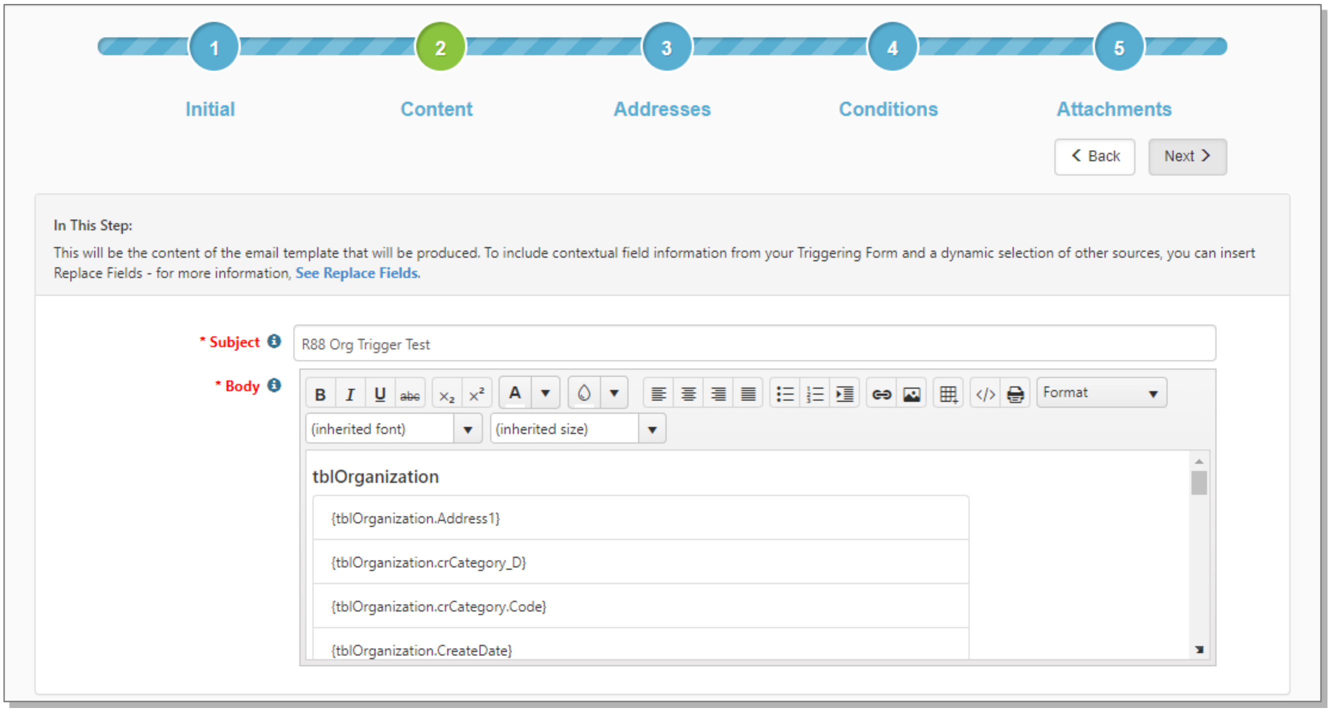
In this step, you provide the content of the email template. To include contextual field information from an Organization, (your Triggering Form in Step 1), you can use replacement fields.

---

[1]A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

[1]A pipleline determines which rules are applied when the data is saved.

[1]Workspace Templates are special workspaces used for cloning during the Workspace creation process. In this way, ClientSpace allows you to set up multiple workspace configurations (such as an industry-specific Workspaces with a specific, limited list of TOC items) then choose how you want the workspace to look and feel by selecting the appropriate template during workspace creation.

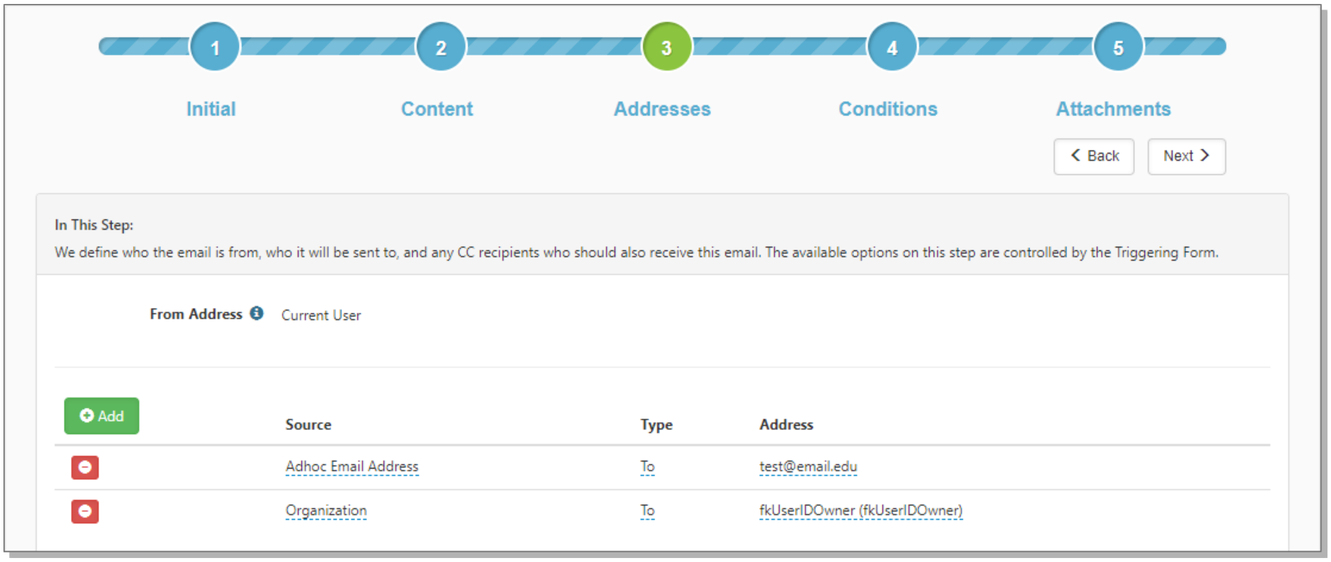


To configure the content of the email:

1. Provide a **Subject** line of the email to be generated.
2. Provide the email message in the **Body**.
   This field uses a rich text editor and supports functions, such as font styling, embedded images, and hyperlinks.
3. Click **See Replace Fields** to select items to copy to the clipboard.
   You can paste items in Subject and Body as applicable. Field replacement includes the active fields from the related Organization and Org Other Info. See Replacement Fields.
4. Click **Next** to proceed to Step 3 Addresses.

Step 3 Addresses

In this step, you define who the email is from, who it will be sent to, and any CC recipients. The Triggering Form controls the available options on this step. When the Triggering Form is **Organization** (Step 1 Initial), then Source options are Adhoc Email Address and Organization.



To configure Addresses:

1. Complete the form fields:

Field	Description
From Address	This field is set to Current User.

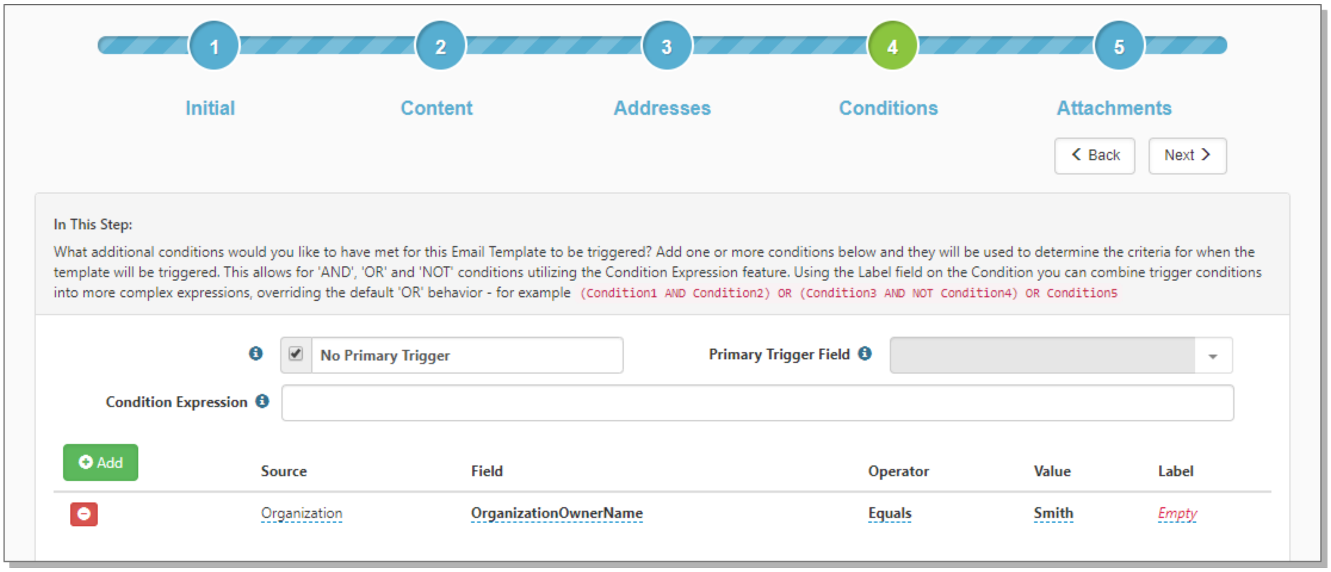
2. To add Addresses, click **Add**.
   A row opens to add recipients to the notification.

Source	The Source list includes: • Adhoc Email Address: When you select this option, type an email address in the Address column. • Organization: When you select Organization, user fields become available in the Address column.
Type	What kind of email recipient type are you setting? Options are **To** or **CC**.
Address	• When Source is Adhoc Email Address, use this field to type an email address to use every time. • When Source is Organization, select a user field.

3. Click **Next** to proceed to Step 4 Conditions.

Step 4 Conditions

In this step, you can specify Organization fields as the trigger fields. When Organization is the Triggering Form (from Step 1 Initial), Source is set to Organization. Available options for Field are any of the Organization fields.



To add conditions:

1. Complete the form fields:

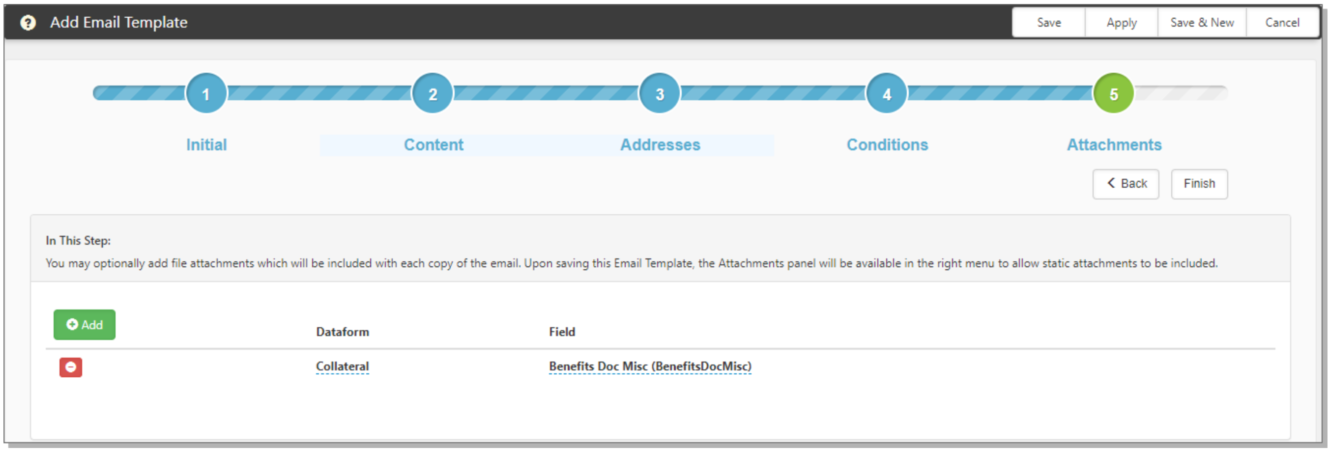
No Primary Trigger	When selected, no single condition must be met to trigger the email template. If this field is selected, the **Primary Trigger Field** is disabled.
Primary Trigger Field	Optional field (from the Triggering Form selected in Step 1), which, when changed, triggers the event. The following statements refer to the condition entries in the **Add** area. Condition entries are identified with a **Label** (the last column). • If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions. • If a Primary Trigger Field is not selected, only the conditions are evaluated. • If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND. • If no Condition Expression is used, the additional conditions are

	treated as OR conditions.
Condition Expression	Condition Expressions use Labels from the display conditions along with AND, OR, and NOT operators to control precedence and sequence. The Add section is where you can add more granular triggering conditions. Entries in this section are called display conditions. If the Condition Expression field is empty, then the entries under Add are treated as OR conditions. Allows for **AND**, **OR**, and **NOT** conditions using the display conditions (Label) from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Condition Expressions adhere to AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions.
Source	When you select **Organization** as the Triggering Form in Step 1 Initial, Source is set to **Organization**.
Field	When you select **Organization** as the Triggering Form in Step 1 Initial, the options for Field include all Organization fields.
Operator	Choose the type of comparison. Each value from a multi-lookup Field can be added as a separate "=" condition. This supports complex AND, OR, and NOT conditions as well.
Value	The criteria against which the trigger field is compared. The Value corresponds to the Field. For example, if you select OrganizationOwnerName in Field, then enter a name in Value.
Label	Make this label short and representative of the Field. Labels are used in the Condition Expression field for triggering.

2. Click **Next** to proceed to the next step.

Step 5 Attachments

You can add attachments at this step to be included with each copy of the email sent. Static attachments can be included through the Attachments panel. Recipients receive any attachments added from the Attachment panel when the template is triggered.



To complete the Attachments step:

1. Click **Add** to begin adding the attachments.
2. Select the **Dataform** from which the attachment will be copied.
3. Select the **Field** from the dataform selected previously that holds the dataform to be copied. A panel displays on the right for adding attachments.
4. To add static attachments, click **Attachments** and ✚ (Upload File). The Upload File dialog box opens.
5. Click **Choose File** to locate the file.
6. Click **Save**.
7. Click **Finish** to complete your email template configuration.

Configuring calendar event notification template

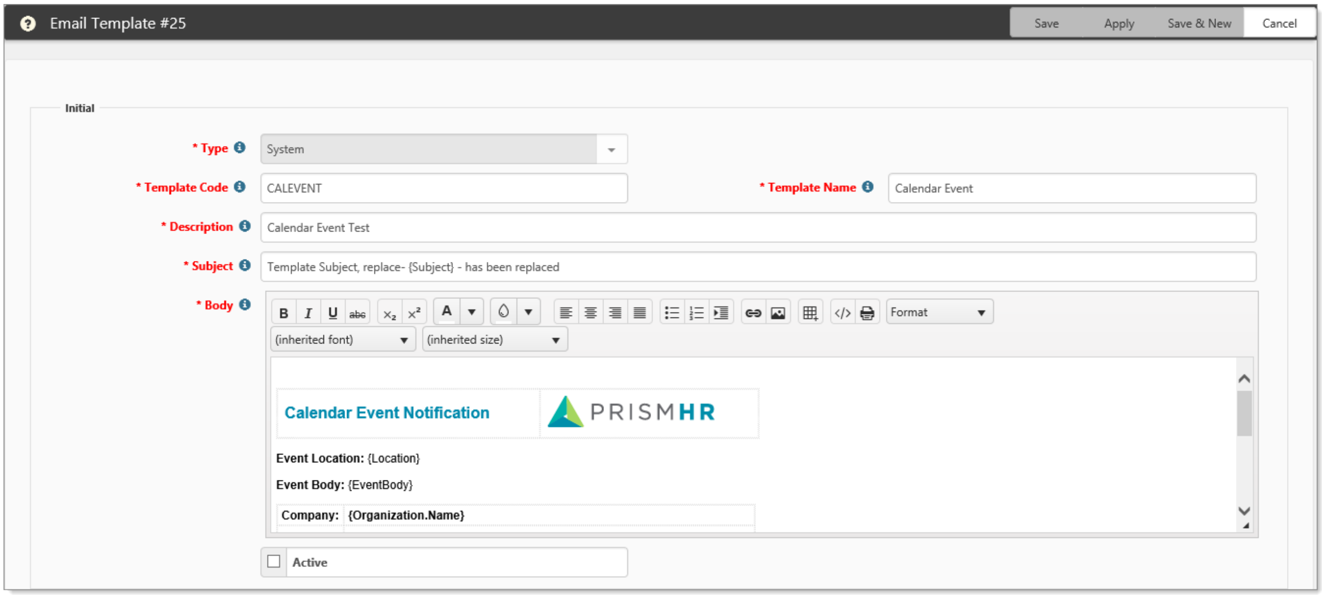
You can configure email notification of calendar events using email templates in ClientSpace allowing for customization of the HTML email. If no calendar event template is published, the system generates email notifications as it always has. For help configuring a calendar event notification template, log an Extranet case.

Calendar events utilize a non-triggered email template. This template is used for both Internal and External (to ClientSpace) recipients.

To configure a calendar event notification template:

1. Go to **System Admin** ⚙ > **Email Templates**. The Email Templates dashboard opens.

2. Click **Add**.
   The Add Email Template form opens.



3. Complete the form fields.

Type	Select **System**.
Template Code	Select **CALEVENT**. Template Code must be unique.
Template Name	Use **Calendar Event**. This name is displayed in the system lists.
Description	Provide a brief description.
Subject, Body	Replace fields are available in both Subject and Body. For more details, see Using replace fields.

4. Click **Save**.

The Email Template must be published. If the Template cannot be located (not published, Template Code incorrect), the default notification format is used.

Using replace fields

Replace fields must be properly formatted and wrapped in curly braces { } to be recognized by ClientSpace as data that you want to replace. Fields available for use as replace fields are from the calendar event, from the related Organization, and from the Contact related to the calendar event. When adding replacement fields, follow these guidelines.

Event Fields

- Only the field name is required: {EventBody}

Organization and Contact fields

The type and field name are required, separated by a period (**.**).

- {Organization.Name}
- {Contact.LastName}, {Contact.FirstName}

The following list contains a complete list of available fields.

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
Enter the field name without a prefix, **{Subject}**	EventBody	Event Body text	This is the Body
ShortStartDate	Event Start Date (short)	5/30/2017	
ShortEndDate	Event End Date (short)	5/30/2017	
FormattedDate	Event Duration (formatted)	5/30/2017 2:00 PM-2:30 PM	
ProjectName	Event Workspace Name	Jim's Testing Workspace	
OrganizerUserName	Event Organizer User Name	Developer User	
CreatedByUser	Event Created By UserID (decoded)	User, Developer	
DateCreated	Event Create Date (short)	5/29/2017	
OrganizationName	Associated Organization Name	415 Group	

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
Location	Event Location text	Jim's Office	
DisplayStartDate	Event Start Date (formatted)	Tuesday, May 30 2017 11:00 AM	
DisplayEndDate	Event End Date (formatted)	Tuesday, May 30 2017 11:30 AM	
MeetingTypeDecode	Event Meeting Type (Decode value)	Standard Meeting	
MeetingStatusDecode	Event Status (Decode value)	Pending	
MeetingCategoryDecode	Event Category (Decode value)	Sub Meeting 1	
OrganizerEmail	Event Organizer User Email		
DateCreatedUtc	Event Create Date in UTC	2017-05-30T14:22:40.43-04:00	
DateUpdatedUtc	Event Update Date in UTC	2017-05-30T14:22:40.43-04:00	
StartDate	Event StartDate (raw)	2017-05-30T14:00:00-04:00	
EndDate	Event EndDate (raw)	2017-05-30T14:30:00-04:00	
OriginalStartDate	Event Original Start Date (raw)	2017-05-30T14:00:00-04:00	
OriginalEndDate	Event Original End Date (raw)	2017-05-30T14:00:00-04:00	
UtcStartDate	Event Start Date (UTC raw)	2017-05-30T18:00:00-04:00	

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
UtcEndDate	Event End Date (UTC raw)	2017-05-30T18:00:00-04:00	
fkOrganizerUserID	Event Organizer UserID	5204	
fkProjectID	Event ProjectID	5218	
pkCalendarEventID	The primary key of the Event	543	
CreatedByUserID	Event Created By UserID	5204	
RowGUID	The RowGUID of the Event	a1505fd6-ddc8-47cf-953f-fdd192287c51	
IsRecurring	Recurring Event flag	FALSE	
IsAllDay	All Day Event flag	FALSE	
IsPrivate	Private Event flag	FALSE	
luMeetingType	Meeting Type (code value)	Standard	
luCalendarEventStatus	Event Status (code value)	Pending	
luCalendarEventCategory	Event Category (code value)	SubMeeting1	
fkContactID	Associated Contact ID	2376	
Sequence	Event Sequence	0	
fkOrganizationID	Associated Organization ID	3289	
ParentRowGUID	Parent RowGUID		

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
OrganizerGUID	Event Organizer User GUID		
RecurrenceEditMode	Recurrence Edit Mode text		
Accepted	Invitee's who have Accepted	User, Developer	
Tentative	Invitee's who have not yet Accepted	Dude, Barry	
Declined	Invitee's who have Declined		
Organization	**Name**	**Org Name**	**415 Group**
Enter the field name, beginning with **Organization. {Organization.AKA}**	EmployerIDNumber	FEIN	555666-8888
AKA	DBA	Jim Test DBA	
Address1	Org Address 1		
Address2	Org Address 2		
City	Org City		
State	Org State (abbreviated)	NE	
PostalCode	Org Postal Code		
Country	Org Country		
County	Org County		
Phone	Org Phone	(303) 221-3155	

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
Phone2	Org Phone 2		
Fax	Org Fax	(303) 221-2431	
Website	Org Website	http://www.netwisetech.com	
GeneralNotes	Org General Notes	Zoom Info Company search...	
OrganizationOwnerName	Org Owner Name	JA	
pkOrganizationId	Org primary key		
fkContactIDPrimary	Org Primary Contact primary key		
fkUserIDOwner	Org Assigned To primary key		
Active	Active or Inactive Org flag	TRUE	
crCategory	Org Category (code value)	Cat2	
crSource	Org Source (code value)	Source1	
crStatus	Org Status (code value)	Status1	
crBusinessType	Org Business Type (code value)	BusType1	
HotList	Org Hot List		
Locked	Org Locked flag	FALSE	
CreateDate	Org Create Date (raw)	2007-08-10T00:00:00-04:00	
CreateUserId	Org Create UserID	4656	

Object	**Field Name**	**Field Description**	**Sample**
Event	**Subject**	**Event Subject text**	**This is the Subject**
UpdatedDate	Org Update Date (raw)	2017-05-15T15:34:14-04:00	
UpdatedUserId	Org Updated By UserID	5204	
Lineage	Org Lineage		
IndustryCode	Org IndustryCode		
ImportID	Org ImportID	IBMC	
AllowImport	Org Allow Import Flag	TRUE	
OrganizationGUID	OrganizationGUID		
AuditTrail	Org Audit Trail	** User, Admin 10/23/2014...	
DoNotCall	Org Do Not Call Flag	FALSE	
Email	Org Email	jim@nwt.industry	
fkPrimaryProjectID	Org fkPrimaryProjectID	5218	
SoundexValue	Org Soundex Value	0	
ZoomInfoID	Zoom Info ID	75759934	
DateLastZoomSync	Date Last Zoom Info Sync	2017-01-12T00:00:00-05:00	
luZoomSyncStatus	Org Zoom Info Sync Status (code)	Complete	
StatusDecode	Org Status (Decode value)	Status 1	
CreateUserName	Org Created By User Name	Kingston1, David	
AssignedTo	Org Assigned To User Name	User, Admin	

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
DepartmentName	Org Department Name	Sales	
ContactName	Org Contact Name	Bundy, Al	
Contact	**FirstName**	**Contact First Name**	**Al**
Enter the field name, beginning with **Contact.** **{Contact.LastName}**	MiddleName	Contact Middle Name	
LastName	Contact Last Name	Bundy	
Prefix	Contact Name Prefix	Mr.	
Suffix	Contact Name Suffix	Jr.	
Title	Contact Title	Manager	
Address1	Contact Address1	1 Tech Way	
Address2	Contact Address2	Suite 101	
City	Contact City	Bradenton	
State	Contact State (abbreviated)	FL	
PostalCode	Contact Postal Code		
County	Contact County	Manatee	
Country	Contact Country	US	
BusinessPhone	Contact Business Phone		
Ext	Contact Phone Ext		
CellPhone	Contact Cell Phone		
Email1	Contact Email1	albundy@nwt.com	

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
Email2	Contact Email2		
Pager	Contact Pager		
Fax	Contact Fax		
GeneralNotes	Contact General Notes		
ContactName	Contact Full Name	Bundy, Al	
OrgName	Contact Org Name	415 Group	
Organization	Contact Organization	415 Group	
pkContactId	Contact primary key		
fkOrganizationId	Contact's Org ID		
Active	Active flag	TRUE	
CreateDate	Contact Create Date (raw)	2013-10-28T19:55:06-04:00	
CreateUserId	Contact Created By User ID		
UpdatedDate	Contact Updated Date (raw)	2017-05-08T15:41:02-04:00	
UpdatedUserId	Contact Update By User ID		
Category	Contact Category (code value)		
ContactGUID	Contact GUID		
fkAssignedToUserID	Contact Assigned To User ID		

Object	Field Name	Field Description	Sample
Event	**Subject**	**Event Subject text**	**This is the Subject**
SyncWithOrganizationAddress	Sync With Organization Address flag	TRUE	
Nickname	Contact Name Nickname		
ImportID	Contact ImportID		
ProfileImage	Contact Profile Image Link GUID		
CreateUserName	Created By User Name	User, Admin	
LoginId	Contact Login Id		

Replacement Fields

Field replacement allows you to select fields from an associated dataform within the workspace from which the task is triggered. Field replacement is available when configuring Email Templates and Workflow Channels. For example, when configuring an Email Template for employee termination, you can select fields for employee-related information such as email, state, city, and SSN. The replacement fields help to customize your message.

- For Email Template configuration, replacement fields are available from the link **See Replace Fields**.
- For Workflow Channel configuration, replacement fields are available from the link **Get Replace Fields**.

You can use replacement fields for Workflow Channel configuration and Email Templates.

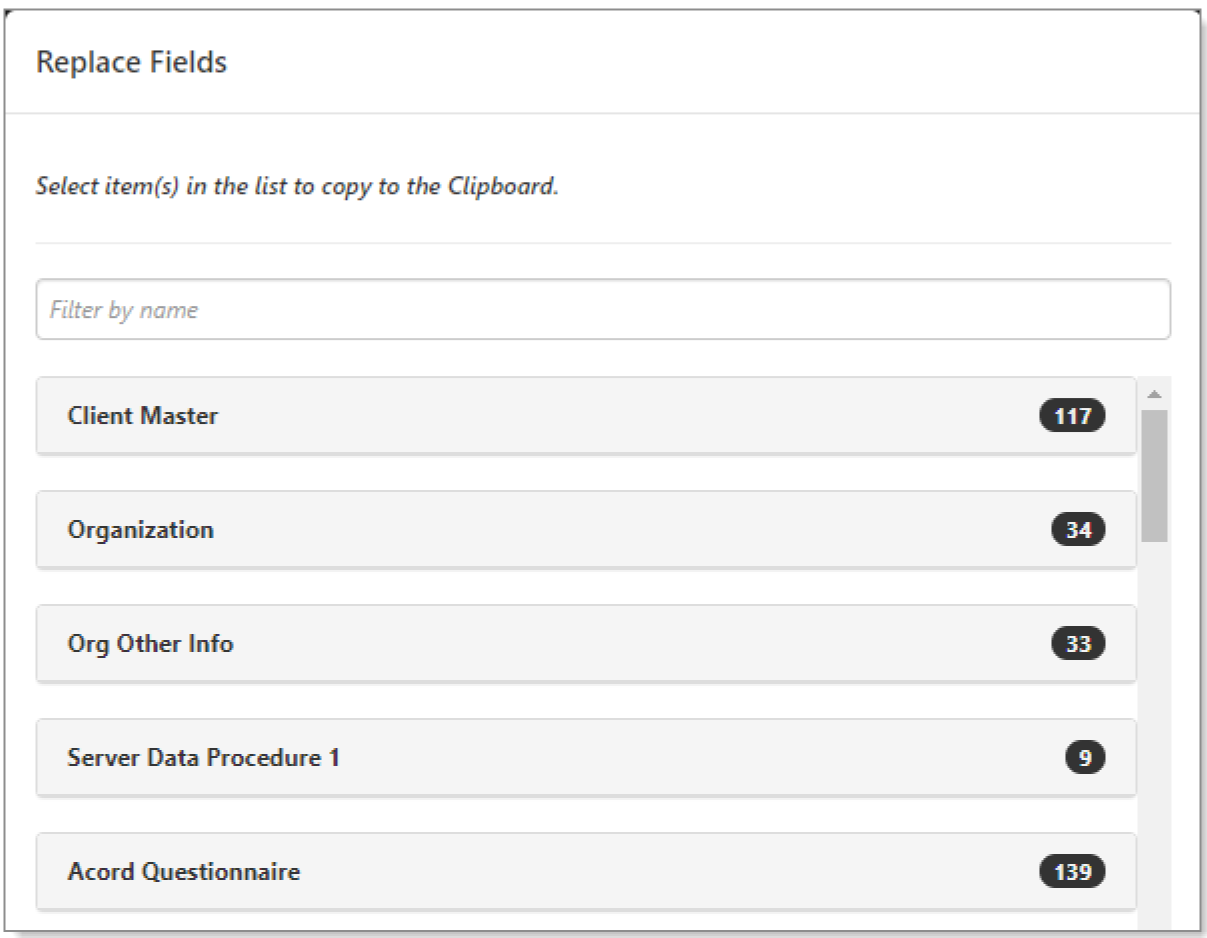
Field replacement includes

- Any active fields on the triggering dataform
- The active fields from any additional condition source dataform
- Task fields when you select **Task** as the Triggering Form on an Email Template

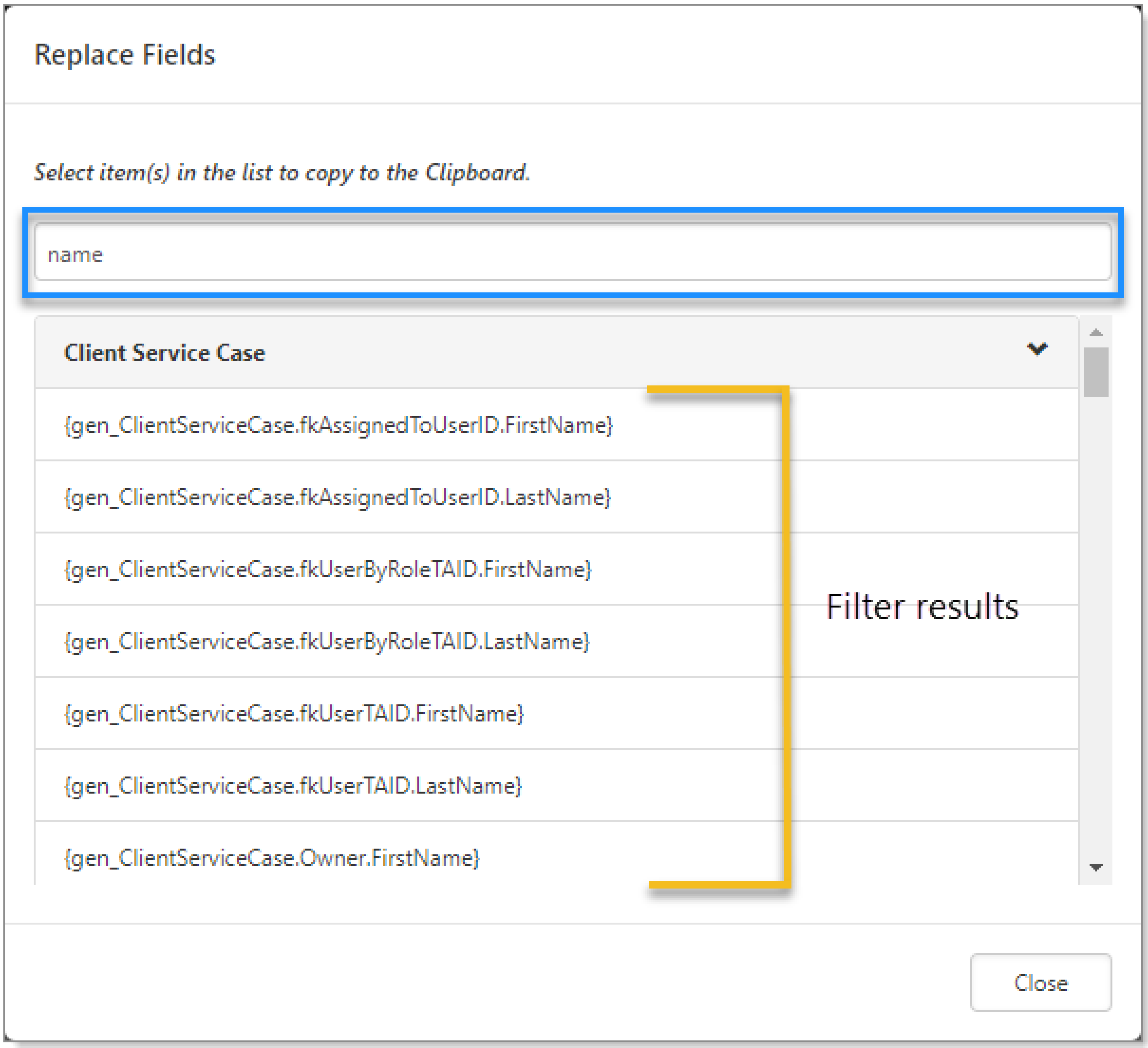
- The active fields from the tabbed forms related to the triggering form
- The active fields from the related Organization and Org Other Info
- Any fields returned by the Server Data Procs related to the triggering dataform
- Any field from the most recent parent dataform, even when tasks are multiple levels deep. See Ancestor fields.

To use replacement fields:

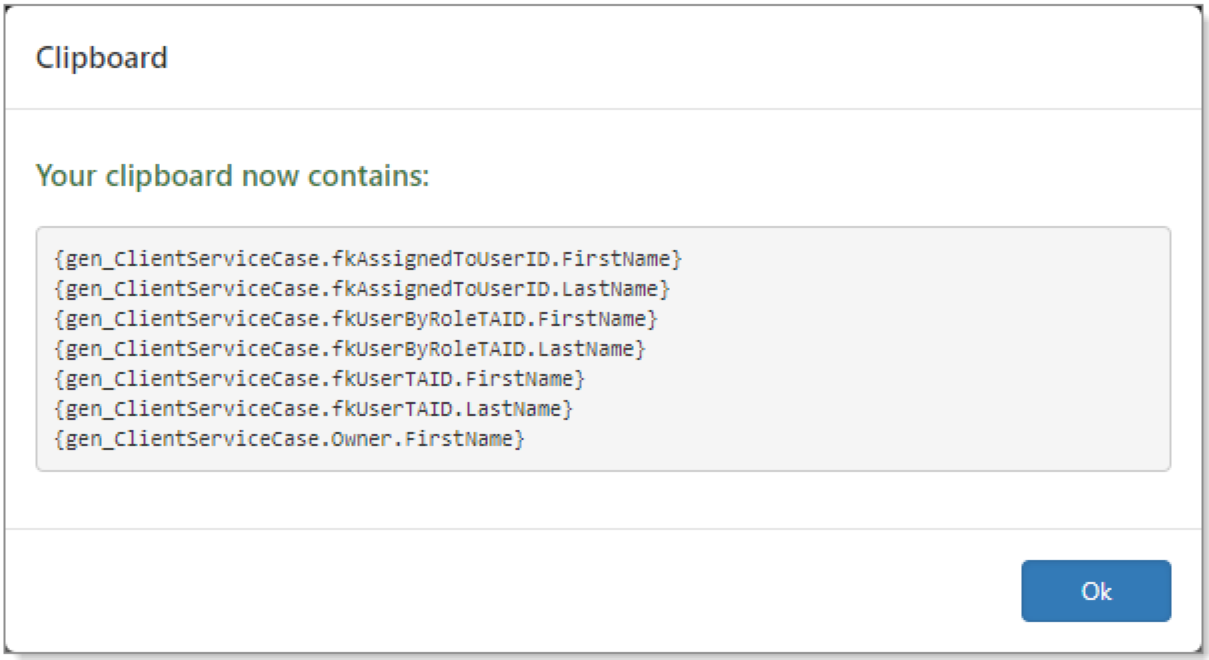
1. For *Email Templates*, in the **Content** step, click **See Replace Fields**. For *Workflow Channels*, in the **Content** step, click **Get Replace Fields**.
   The Replace Fields dialog box opens, displaying fields grouped by source section and expanded.
2. Collapse the source sections to view the count.



3. To search for fields, in the **Filter by name** box, start typing your keyword. As you type, the matching fields display. For example, type **name** and all entries with *name* are displayed.



4. Select as many fields as applicable and then click **Copy**.
   The Clipboard dialog box opens with the selected fields.



5. Click **Ok**.
6. On the Email Template or Workflow Channel, click in the field (Subject, Body, or Text Area) where you want to insert the replacement fields.
7. Paste the copied fields (**Ctrl+V**).
8. You can move the fields around as appropriate (copy and paste). You can invoke the Replace Fields dialog as often as necessary to paste your required fields.
9. Click **Apply**.

Alternate values

The following fields provide alternate values.

Field	Value
Contact	• **TableName.FieldName.FirstName** (blank if empty) example Client Master.PrimaryContact.FirstName • **TableName.FieldName.LastName** • **TableName.FieldName** returns **LastName, FirstName**

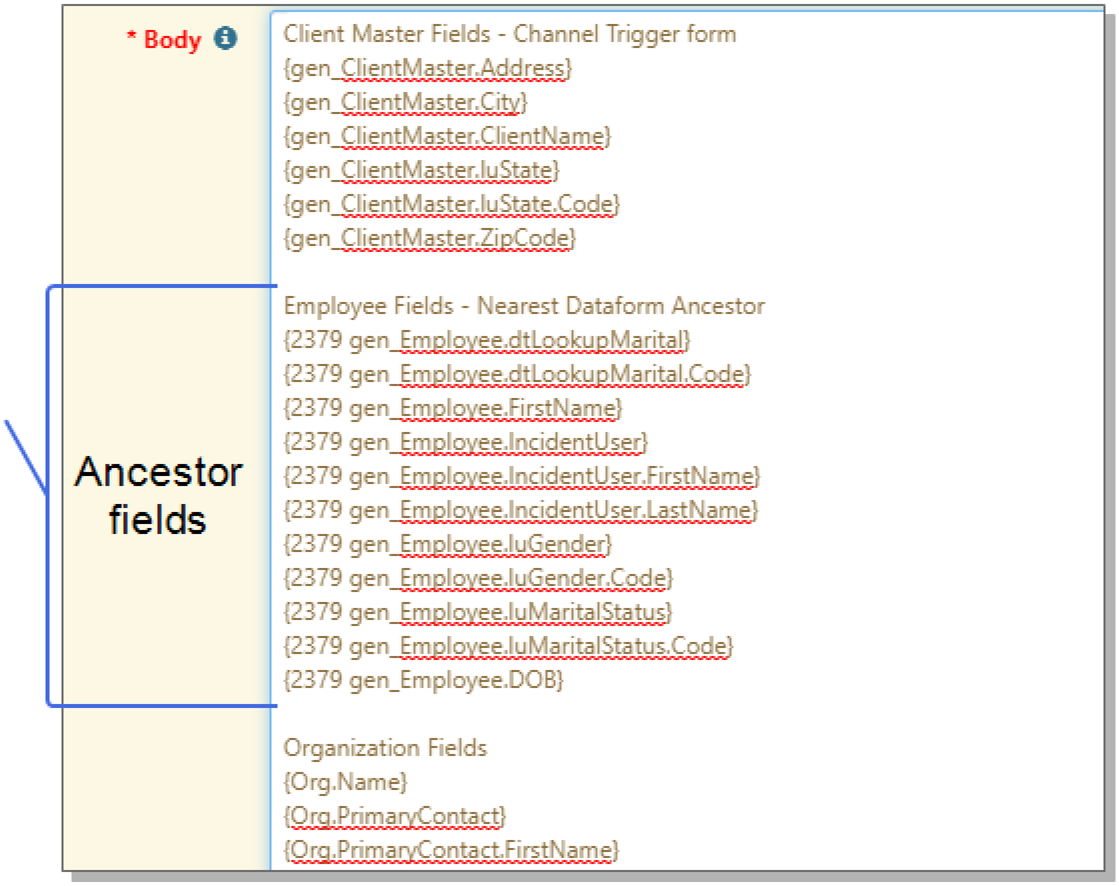
Field	Value
Users	• **TableName.FieldName.FirstName** example ClientMaster.SalesRep.FirstName • **TableName.FieldName.LastName** • **TableName.FieldName** returns **LastName, FirstName**
Text area	• **TableName.FieldName** returns the first 250 characters (appends "..." if the field contains more than 250 characters) • **TableName.FieldName.All** returns entire field • **TableName.FieldName.<integer>** returns first ## number of characters (replace <integer> with the numeric character count). If the field contains more than <integer> number of characters, it appends "**...**" For example, Clientmaster.DescriptionOfOps.7 returns the first 7 characters from this field. If the field contains more than 7 characters, these will end with **...** indicating more info is available.
Lookup	• **TableName.FieldName** returns **Decode** value displayed in the application • **TableName.FieldName.Code** returns **Code** value stored in the field
Integer	• **TableName.FieldName** returns comma formatted value (##,###)
Decimal or Money	• **TableName.FieldName** returns comma formatted value (##,###.##) or 0.00 if blank

Ancestor fields

The following image illustrates pulling ancestor fields as replacement fields into the Body field. The fields are from the nearest dataform ancestor.

Example: `2379 gen_Employee.FirstName`

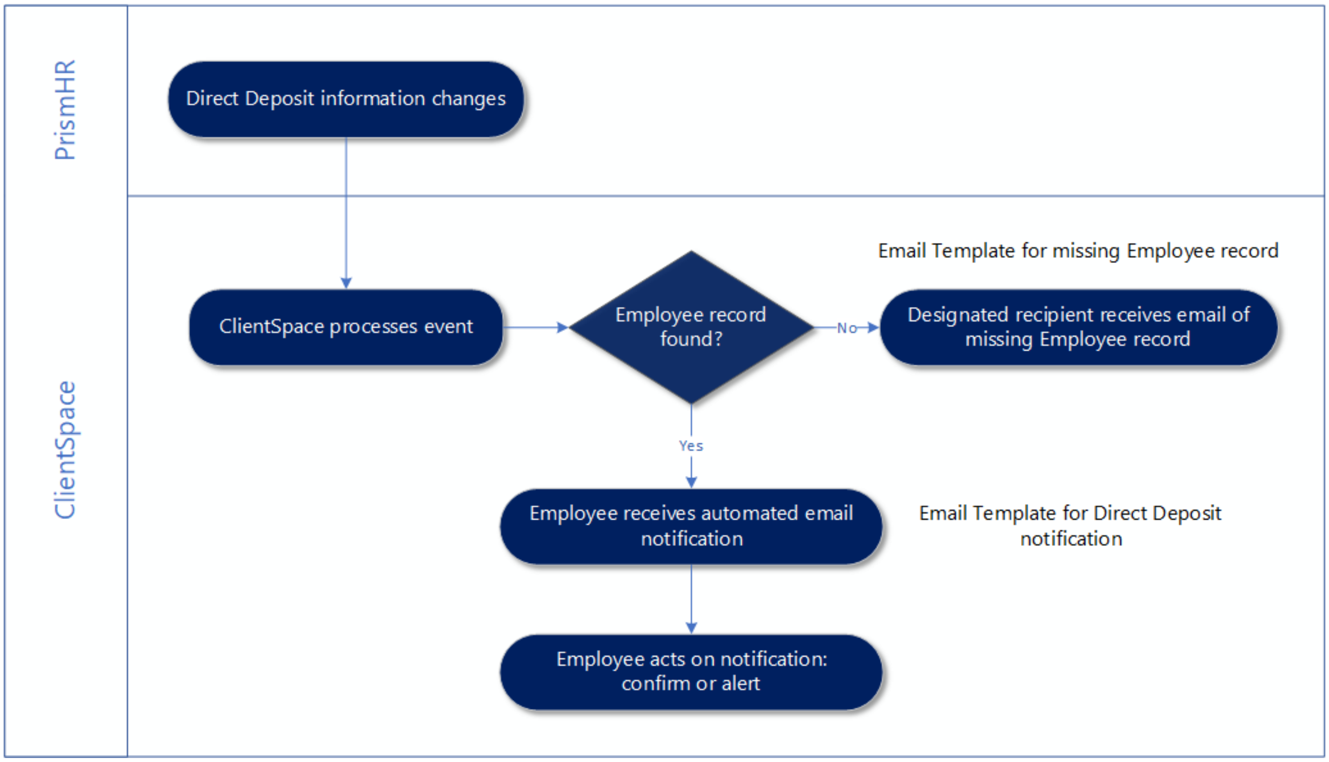
- The Workflow item is 2379
- The form is gen_Employee
- The field is FirstName



Configuring Direct Deposit notifications in ClientSpace

This topic provides ClientSpace System Administrators with step-by-step instructions for configuring a customized direct deposit email notification. The notification helps worksite employees and service providers to be more proactive in detecting and preventing fraud attempts.

When a worksite employee’s direct deposit account number or transit number is added or changed, a notification is sent to the employee. If the employee did not add, edit, or authorize a change to their direct deposit information, the employee can contact their service provider. The following diagram illustrates the process and the Email Templates you need to configure.



To learn more about configuring an Email Template for missing Employee records, see Configuring Direct Deposit notifications for missing Employees.

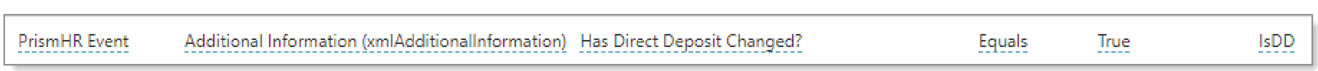
To learn how to create a direct deposit notification in ClientSpace:

- Watch this step-by-step video.

Condition for: Has Direct Deposit Changed?

System administrators want to ensure that the Direct Deposit notifications are only sent when a true Direct Deposit change occurs. The objective is to avoid alerting users when changes are applied to an HSA account or during a pre-notification process.

On the email template, in the Conditions step, you can add a condition that is configured for Direct Deposit notification. In the Add section, the selected Source is **PrismHR Event**, and the Field is set to **Additional Information (xmlAdditionalInformation) Has Direct Deposit Changed?**:



Review the following procedure (see To configure conditions, click Add.) to learn how to add this condition.

Condition for: Who made the change to data in Prism?

System administrators want to identify the source of who made the change to data in Prism. This information aids in configuring workflows based on if an internal or external user changed data.

On the email template, in the Conditions step, you can add a condition to identify the source of the change. In the Add section, the selected Source is **PrismHR Event**, and the Field is set to **Additional Information (xmlAdditionalInformation)** and then **User Type** or **Username**.

PrismHR Event	Additional Information (xmlAdditionalInformation)	User Type	Equals	external	IsExt

PrismHR Event	Additional Information (xmlAdditionalInformation)	Username	Equals	jsmith	IsUser

Review the following procedure (see To configure conditions, click Add.) to learn how to add this condition.

Configuring the Direct Deposit notification

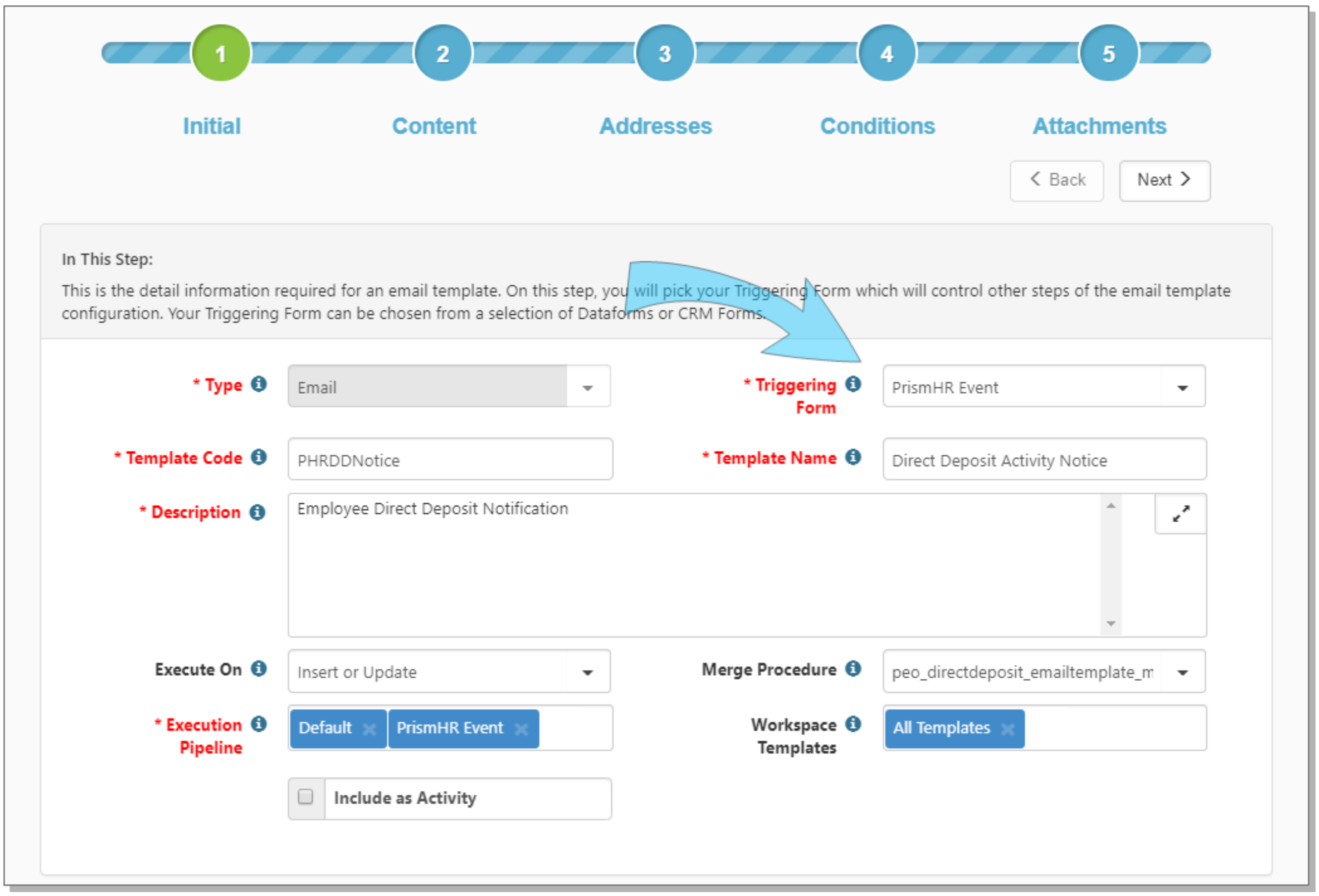
The following procedure guides you through the steps to configure a direct deposit notification using email templates.

To configure a direct deposit notification in ClientSpace:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Click **Add**.
   The Email Template wizard opens at Step 1 Initial.
3. Complete **Step 1 Initial**.

Triggering Form	Select **PrismHR Event**.
Template Code	Add a short descriptive code to identify this template, such as **DDNotice**.
Template Name	Add a descriptive name (this is displayed in the application list), such as **Direct Deposit Activity Notice**.
Description	Include a brief description, such as **Employee Direct Deposit Notification**.
Execute On	Select **Insert or Update**.

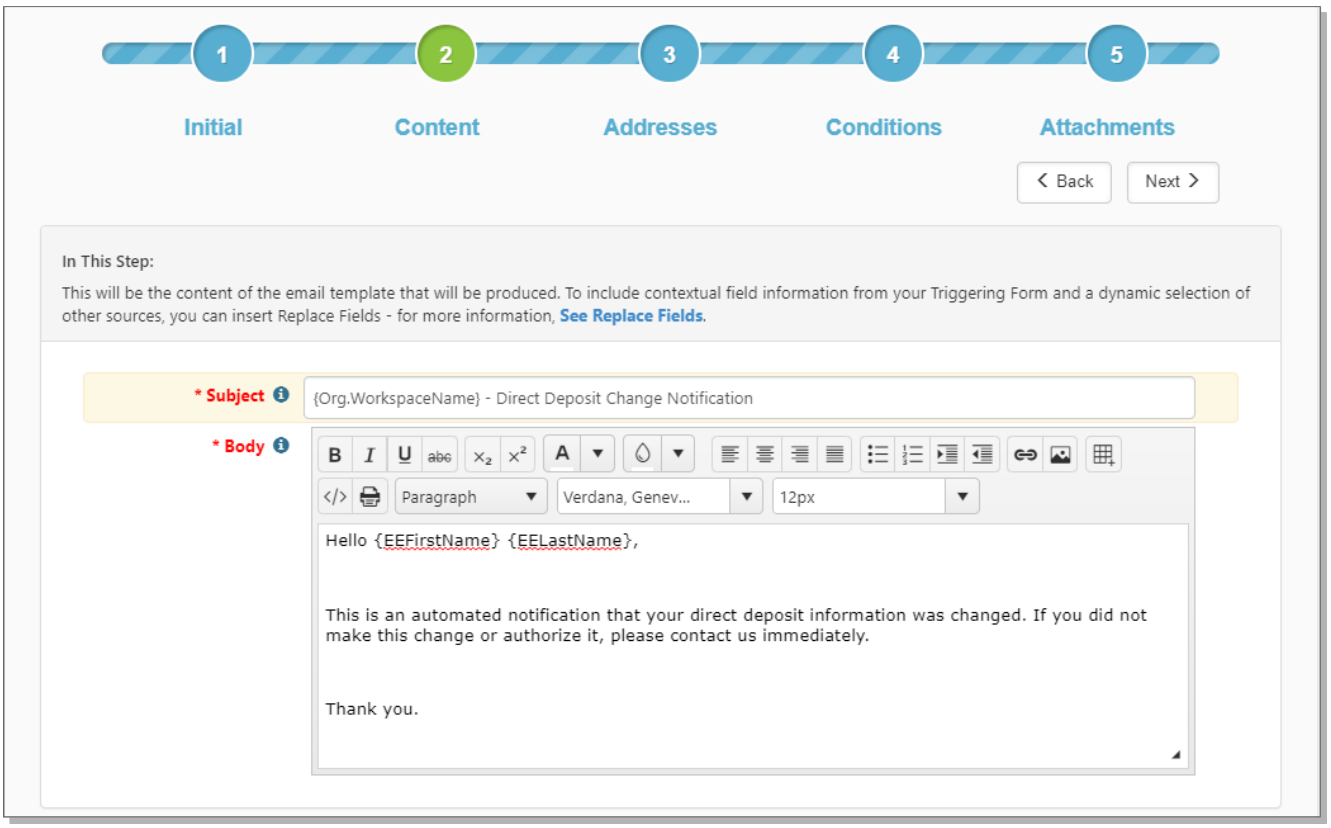
Merge Procedure	Select an optional Merge Procedure to provide additional system information for Field Replacement. The **peo_directdeposit_ emailtemplate_merge_proc** option adds additional merge replacement information for this email template in Step 1. The peo_ directdeposit_emailtemplate_recipient_v2_proc also includes the Previous Personal Email and Previous Work Email.
Execution Pipeline	Indicates how the data enters ClientSpace. Remove the option for **Default** and select **PrismHR Event**.
Workspace Templates	Select the Workspace Templates that will receive this email. Default is **All Templates**.



4. Click **Next** and complete **Step 2 Content**.

Subject	The subject line of the email that is generated. The email recipients see

	this subject.
Body	The body of the email that is generated. This field supports rich text, so the email may be branded and include links. This is seen by the email recipients. You can use replacement fields to customize the message. To use replacement fields, click **See Replace Fields**. For details about replacement fields, see Replacement Fields.
Trigger Field	Leave as blank for this email template.



5. Click **Next** and complete **Step 3 Addresses**.

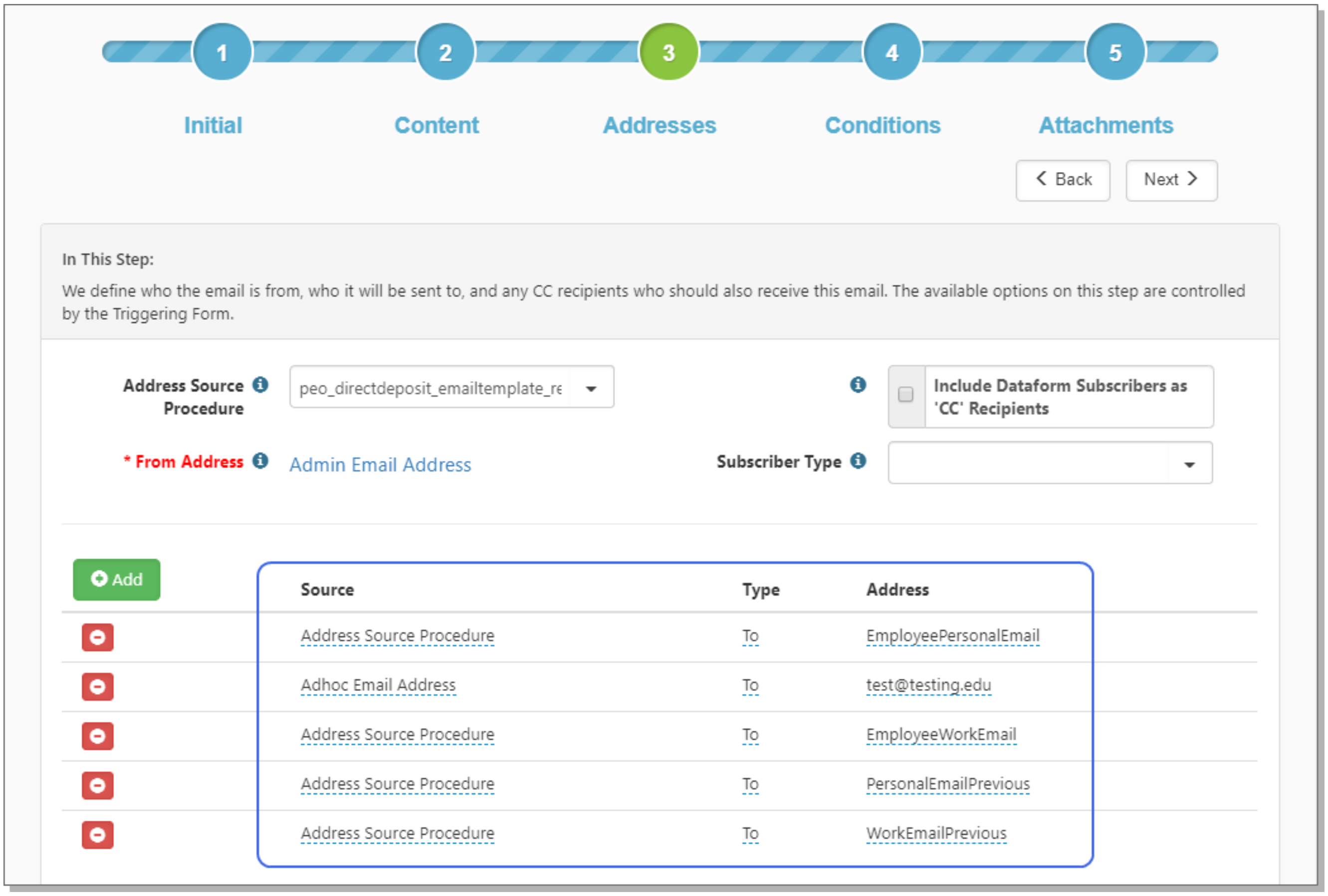
Address Stored Procedure	Select **peo_directdeposit_emailtemplate_recipient_proc** for this email template. The **peo_directdeposit_emailtemplate_recipient_v2_proc** includes the Previous Personal Email and Previous Work Email.
Include Dataform	Adds anyone who has subscribed to the dataform as CC recipients

Subscribers as 'CC' Recipients	when this notification is sent in addition to any other recipients you configure here. When enabled (selected), this option presents a list to notify internal, external, or both recipient types: • **Internal**: When the email template is triggered, only internal dataform subscribers are notified. • **External**: When the email template is triggered, only external dataform subscribers are notified. • **Both**: If you select Both or leave the field blank, all dataform subscribers are notified.
From Address	This field defaults to Admin Email Address (the application administrator's email address). This is the default admin email set in System Admin > Advanced > App Settings. **To change this setting:** 1. Click the link (**Admin Email Address**). The From Address Options dialog box opens. 2. Select one of the following options: ◦ **Admin Email**: Uses the default admin email set in App Settings. For assistance with App Settings, please log a case in the Extranet. ◦ **AdHoc**: Allows you to manually add to the From list by simply typing it in. This should be an active mailbox address so the employee can reply directly to the email if they need to contact you immediately. Additionally, you can specify a friendly name to accompany the email address. For more details about using AdHoc, see Specifying a friendly name as From Address. ◦ **User**: Select a specific user of the system. ◦ **Procedure**: Select an address stored procedure and pick the From address. ◦ **Field on a Form**: Select a dataform from a list of forms in the system that have relevant email fields. You can set user fields to values that exist on dataforms across a tabbed set. If the selected user fields are empty, the default value is the system admin. For more details, see From a Field on a

	Form. 3. When done, click **Ok**.

6. To add the Employee as a recipient, click **Add**.
   A row opens. This is where you specify the Employee's work or personal email addresses.

Source	For this email template, select **Address Source Procedure**. This selection makes the Employee's email address available in the Address column. To include additional team members as recipients, you can select Client Team or Adhoc Email Address. When you select Adhoc Email Address as the Source, you type a specific email address in Address.
Type	Type can be **To** or **CC**.
Address	You can select the employee's personal or work email address. This address triggers the employee notification when their direct deposit information changes.



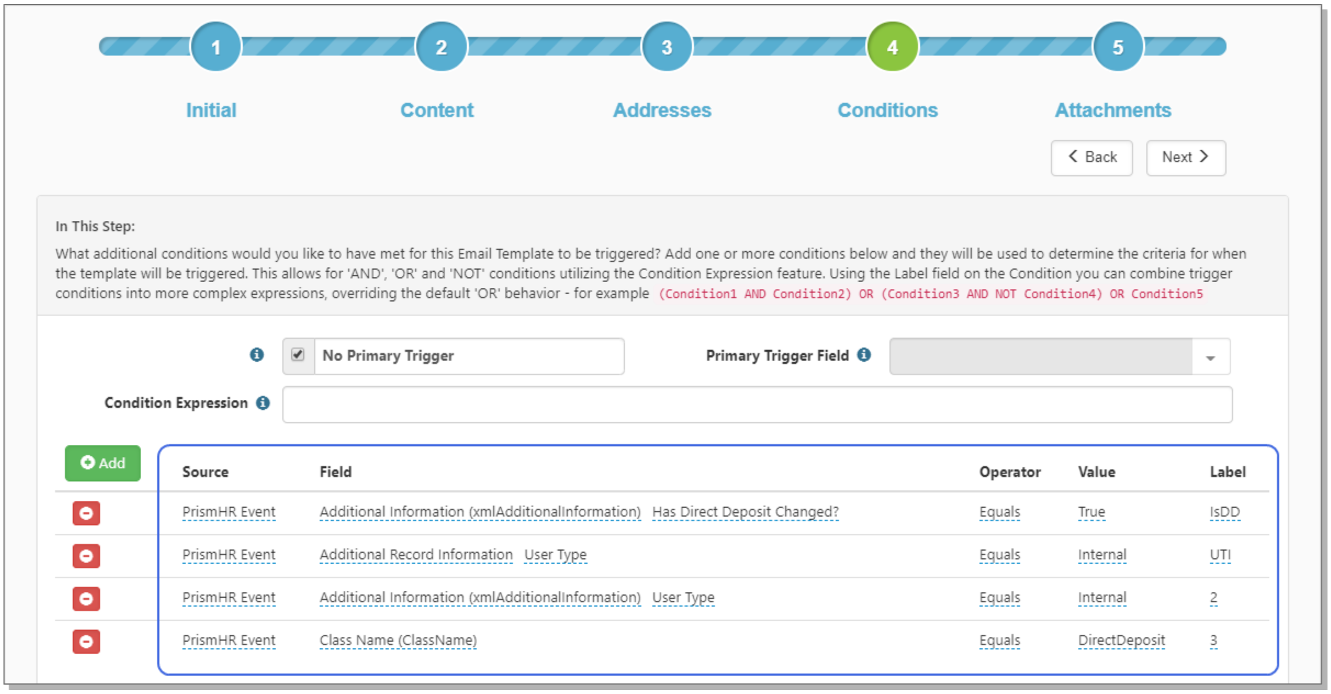
7. Click **Next** and complete **Step 4 Conditions**.

No Primary Trigger	Enable this option. (Select the option.)
Primary Trigger Field	Not used.
Condition Expression	Allows for **AND**, **OR**, and **NOT** conditions using the display conditions (Label) from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. In the example, the Condition Expression uses the display condition labels HOL1, HOL2, and HOL3. Condition Expressions use AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions.

8. To configure conditions, click **Add**.

A row opens for adding conditions to include Source, Field, Operator, Value, and Label. You can add multiple conditions.

Source	Indicates the dataform or stored procedure that provides the triggering condition. Select **PrismHR Event**.
Field	This is the field that is evaluated for the conditions. Select **Class Name**. This field captures the classification of event records that come through the API. • To add the condition Has Direct Deposit Changed: Select **Additional Information (xmlAdditionalInformation) Has Direct Deposit Changed?** • To add the condition for who made the change: Select **Additional Information (xmlAdditionalInformation) Username** or **User Type**.
Operator	The type of comparison between Field and Value. For the condition Has Direct Deposit Changed or who made the change, select **Equals**.
Value	The criteria against which Field is compared. • For the condition Has Direct Deposit Changed, select **True**. • For the condition who made the change, enter a value such as Internal, External, or a username.
Label	The label to be used when constructing Condition Expressions for triggering. Make this label short and representative of the selected in Field. Labels are used in the **Condition Expression** field.



9. Click **Next.**
10. Skip Step 5 Attachments.
11. Click **Finish** to save your work.

After you click Finish, you are returned to the Email Template list. This email template does not work just yet because it is unpublished (inactive). You must publish the new email template to make it active.

If you are ready to publish immediately:

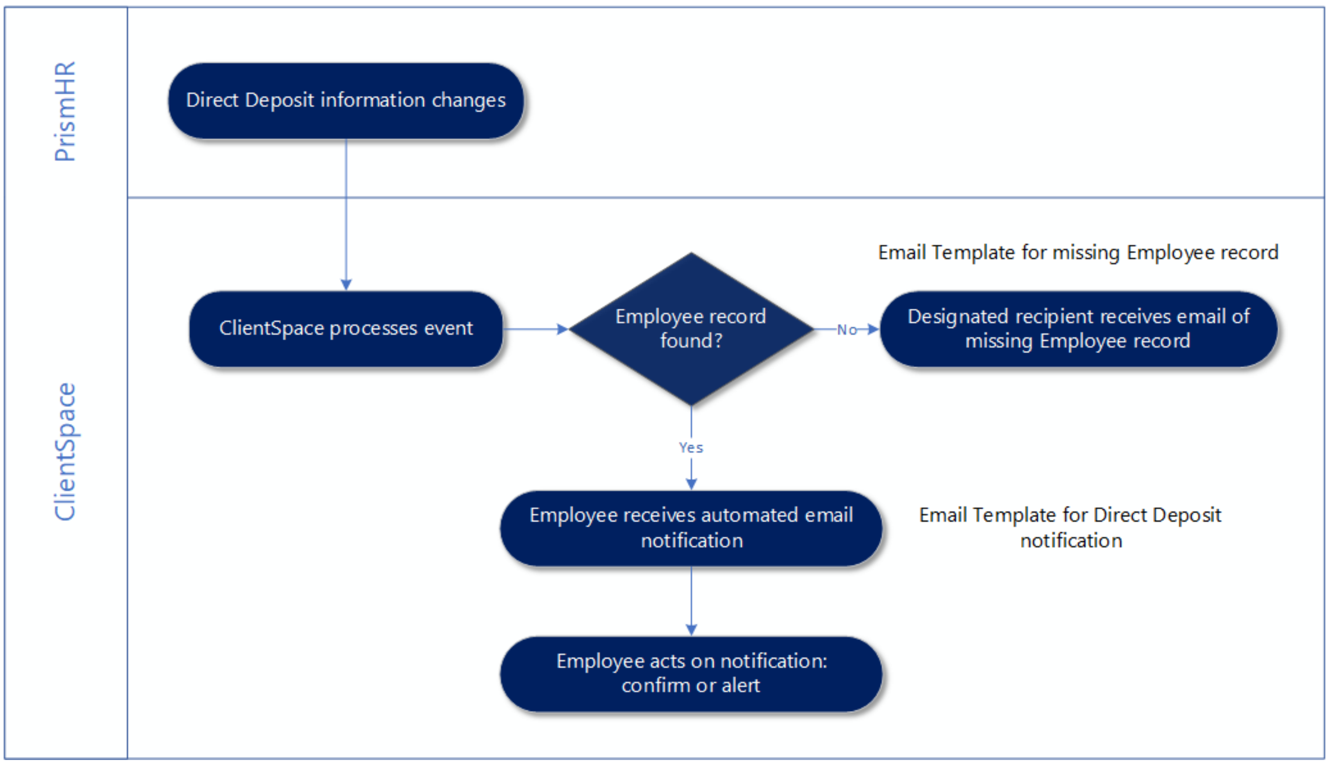
1. Select the row for **DDNotice** (this is the email template that you just added).
2. Click **Publish**.
   The entry is now published.

If you would like to publish later:

1. Navigate to the Email Template list.
2. Clear the **Published** option.
   The entry is now unpublished.

Configuring Direct Deposit notifications for missing Employees

A Direct Deposit notification is driven from a PrismHR Event entering ClientSpace after Direct Deposit information changes in PrismHR. A direct deposit event should always be associated with an Employee. In the event it is not (Import issues, for example), you can configure an Email Template to send a notification to a designated recipient, alerting them that the direct deposit was changed and a notification was not sent to an Employee.



To configure this email template, we recommend that you clone the Direct Deposit notification template, and then edit as follows. If you need assistance, please log an Extranet case.

To configure the notification:

1. Go to **System Admin** ⚙ > **Email Templates**.
   The Email Templates dashboard opens.
2. Locate and select the entry for your organization's **Direct Deposit** and click **Clone**.
   The Add Email Template wizard opens to Step 1 Initial.
3. Complete the following fields:

Template Code	Enter a unique template code that indicates the purpose.
Template Name	Provide a short, descriptive name for your template. Displays in the email template list.
Description	Edit the description to indicate the purpose.

4. Click **Next**.
   The form for Step 2 Content opens.
5. Edit the following fields:

Subject	Edit the Subject to indicate no employee was identified.
Body	Edit the Body to indicate no employee was identified.

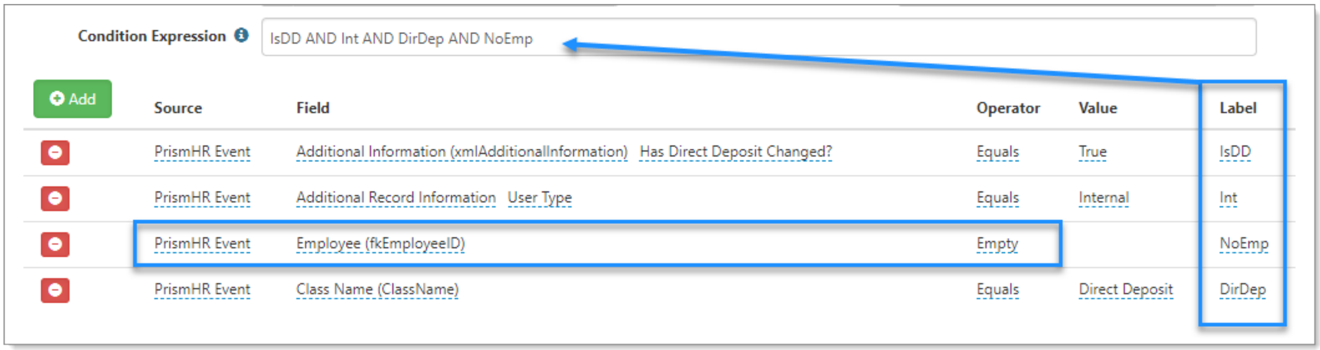
6. Click **Next**.
   The form for Step 3 Addresses opens.
7. Click **Add**.
   A new row opens.

Source	Select **Adhoc Email Address**.
Type	Select **To**.
Address	Enter the email address for the designated recipient when no employee is identified. This is the person who will receive the notification.

8. Click **Next**.
   The form for Step 4 Conditions opens.
9. Add a condition for Employee Empty.

Source	Select **PrismHR Event**.
Field	Select **Employee (fkEmployeeID)**.
Operator	Select **Empty**.
Label	Enter a label for this new condition, such as NoEmp.

10. In **Condition Expression**, add an AND for the new condition. The following example uses **AND NoEmp**, where NoEmp is the Label for the condition Field=Employee and Operator=Empty.



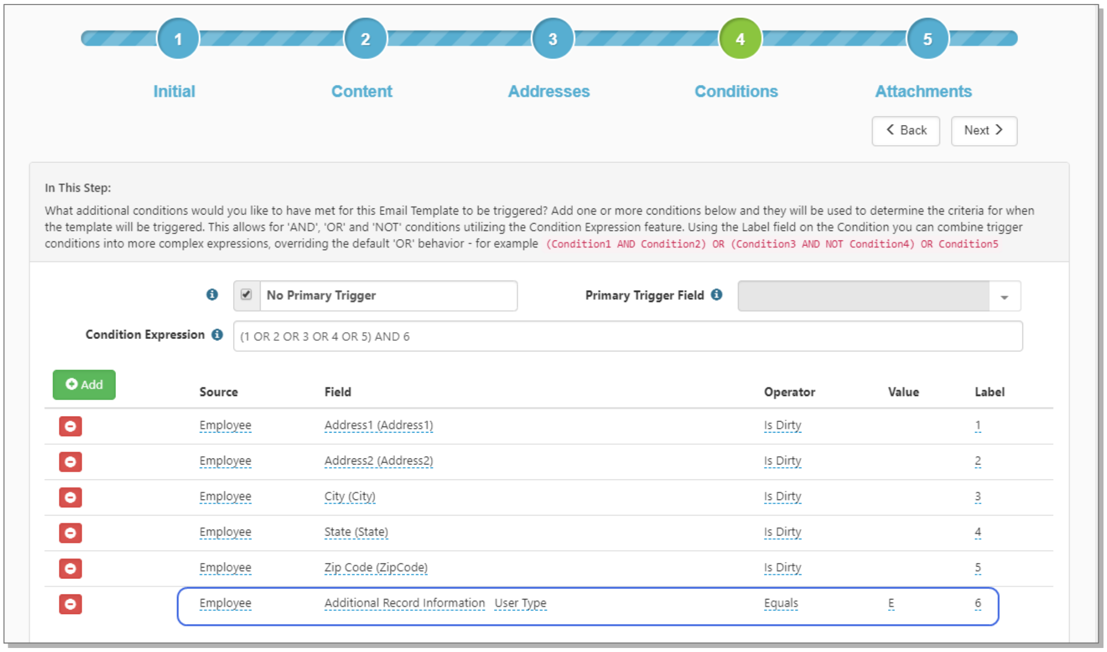
11. Click **Save**.
    The new template is published and displayed in the Email Templates list.

Tracking data modifications in PrismHR

Additional Information allows you to customize your Workflow Channels and Email Templates related to data that is changed in Prism to reflect the source of the change. When data is modified in PrismHR (for example, a Client's address changes, or an Employee is added), the PrismHR API generates an Event in a queue. The ClientSpace Ongoing scheduled process polls the Event queue for new Events (relative to the last time the scheduled process ran). If the Events contain data that is mapped by ClientSpace (using Import mappings), the Event is processed, and data in ClientSpace is updated.

AdditionalInformation is a data element provided by the PrismHR API. Each Event contains an AdditionalInformation element that, in turn, contains data appropriate to the type of the Event (Schema). For example, if an Employee's email address changes, the AdditionalInformation informs us which User made the change and the Type of that User (Internal or External).

The purpose of



AdditionalInformation is to allow Workflow Channels and Email Templates to react to specific conditions unique to each dataform save. AdditionalInformation data is available to ALL dataforms in the system. It is a pseudo-field in that it is not a true dataform field, but it is available in code to be exposed to the dataform save data. It is not visible on the dataform in the application.

In Workflow Channels and Email Templates, the additional information is available as **Additional Record Information** and has an associated user type.

To use Additional Information in a Workflow or Email Template, go to Tracking Additional Information in Prism events: Triggering from Additional Record Information.

Tracking Additional Information in Prism events: Triggering from Additional Record Information

ClientSpace can track what type of user made a data change in Prism when that data imports into ClientSpace. Administrators can then use that information and alter workflows based on who applied the change – a PEO employee or a worksite employee.

The data change information is available from a column in the import queue, named Additional Information. All dataforms accommodate the Additional Information column data to show the **prismUserName** and the **userType**. The userTypes are as follows:

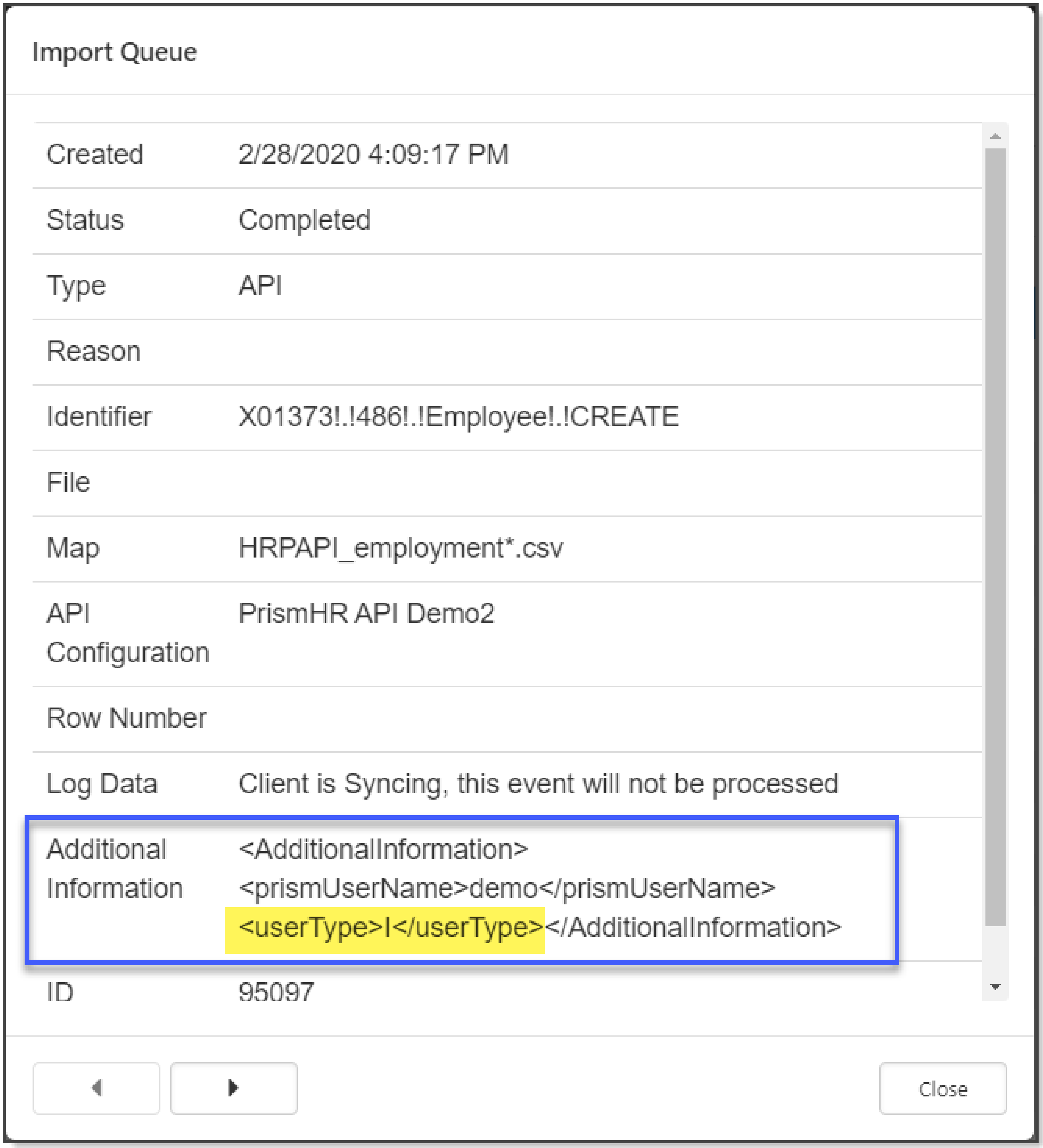
- I = service provider

- E = employee
- A = worksite trusted adviser
- M = worksite manager

Additional Information data is only available as a trigger condition from the Triggering Form configured on a Workflow Channel or Email Template

To view the Import Queue:

1. Go to **System Admin** > **Imports** > **Manage Import Queue**.
   The Import Queue dashboard opens.
2. Select an entry and click **View**.
   The Import Queue record opens.
   In the following example, Additional Information shows **userType = I**, which represents the service provider.


Import Queue
Created
2/28/2020 4:09:17 PM
Status
Completed
Type
API
Reason
Identifier
X01373!.!486!.!Employee!.!CREATE
File
Map
HRPAPI_employment*.csv
API Configuration
PrismHR API Demo2
Row Number
Log Data
Client is Syncing, this event will not be processed
Additional Information
<AdditionalInformation><prismUserName>demo</prismUserName><userType>I</userType></AdditionalInformation>
ID
95097
Close

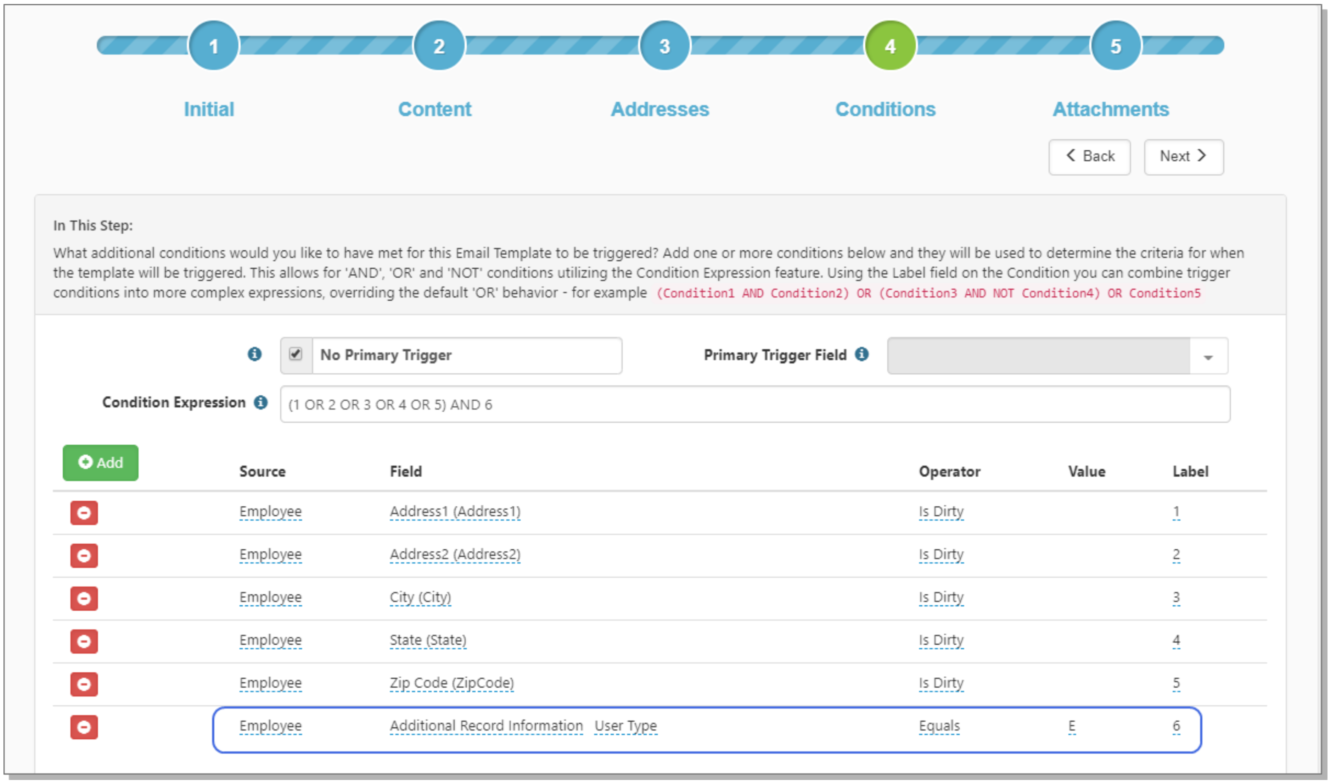
To use Additional Information in a Workflow or Email Template:

1. Go to **System Admin** > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. Select a Workflow Item that uses the Client Master as the Triggering Form and click **Details**.
3. Go to **Step 4 Conditions**.
4. Click **Add**.
   A row opens for Source, Field, Operator, and Value. In your conditions, specify user type or user name, and then the Value. Value represents the type of user that made the change. Was it a service provider, employee, worksite trusted employee, or a worksite manager who made the change?

Source	Source auto-fills with Client Master.
Field	In **Field**, 1. Select **Additional Record Information**. 2. Select **UserType**.
Operator	Auto-fills with **Equals**.
Value	Enter a value: • I = service provider • E = employee • A = worksite trusted adviser • M = worksite manager
Label	The Label value is used in the Condition Expression. See Condition Expressions.

5. Click **Save**.
6. For Email Templates, configure Source, Field, Operator, and Value in Step 4 Conditions.

   The following example has six conditions with Label 1 through 6. The Condition Expression states that when any of the employee address fields change (address, city, state, or zip code), AND the user type is an Employee (value = E), then trigger this email. When an employee changes the employee address information, then the email is sent to the recipients listed in Step 3 Addresses.



Configuring notifications for Employee email address changes

When a worksite employee's work or personal email address is added or changed, you can send a notification to the employee. If the employee did not add, edit, or authorize a change to their email address, they can contact their service provider. The notification helps worksite employees and service providers to be more proactive in detecting and preventing fraud attempts.

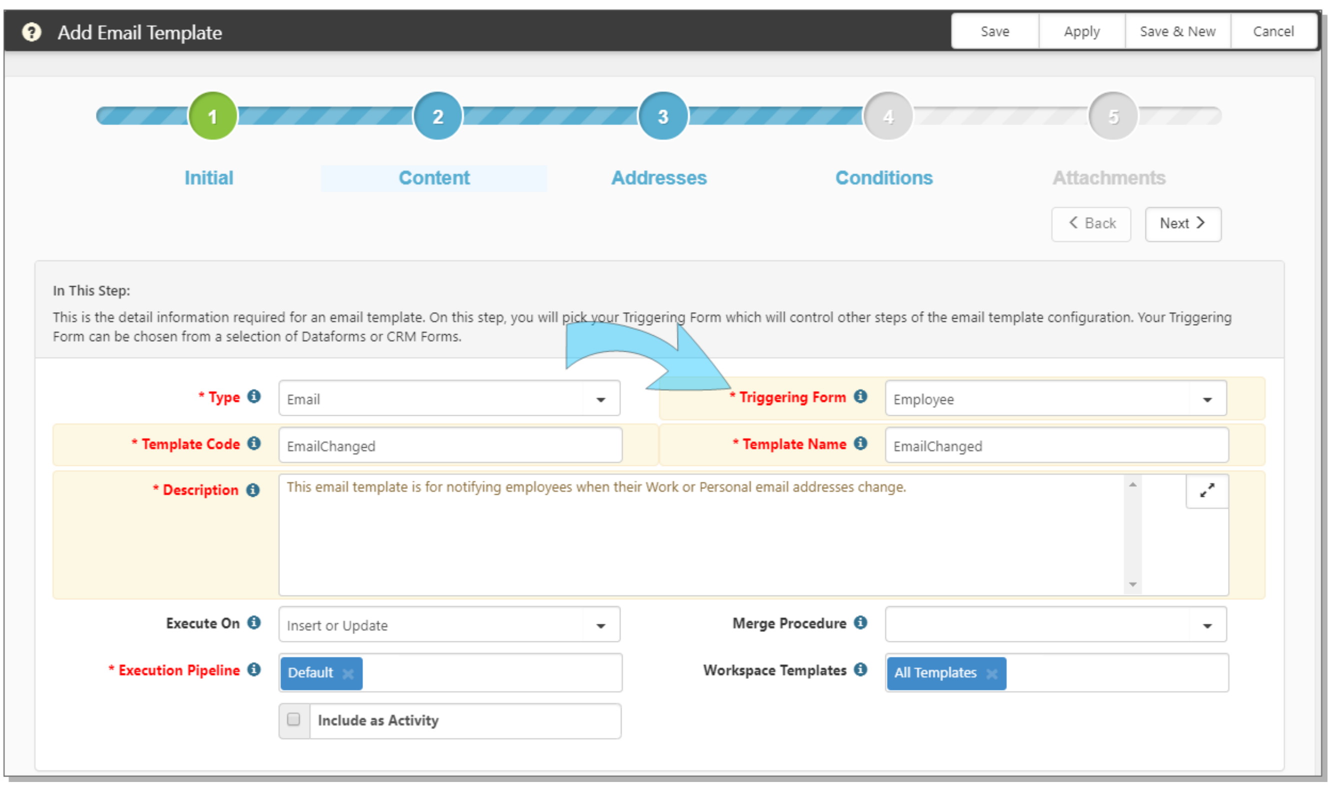
How does it work? When an Employee's Work Email and Personal Email changes occur in PrismHR, a business rule sets the Previous Email fields. The business rule (**SetPreviousEmails**) is set on the Employee dataform for when PersonalEmail or WorkEmail is changed. This rule stamps the old value into the corresponding PersonalEmailPrevious and WorkEmailPrevious fields. This rule is set to run on the Default and Imports pipelines.

To configure an email address change notification template:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Click **Add**.
   The Email Template wizard opens at Step 1 Initial.

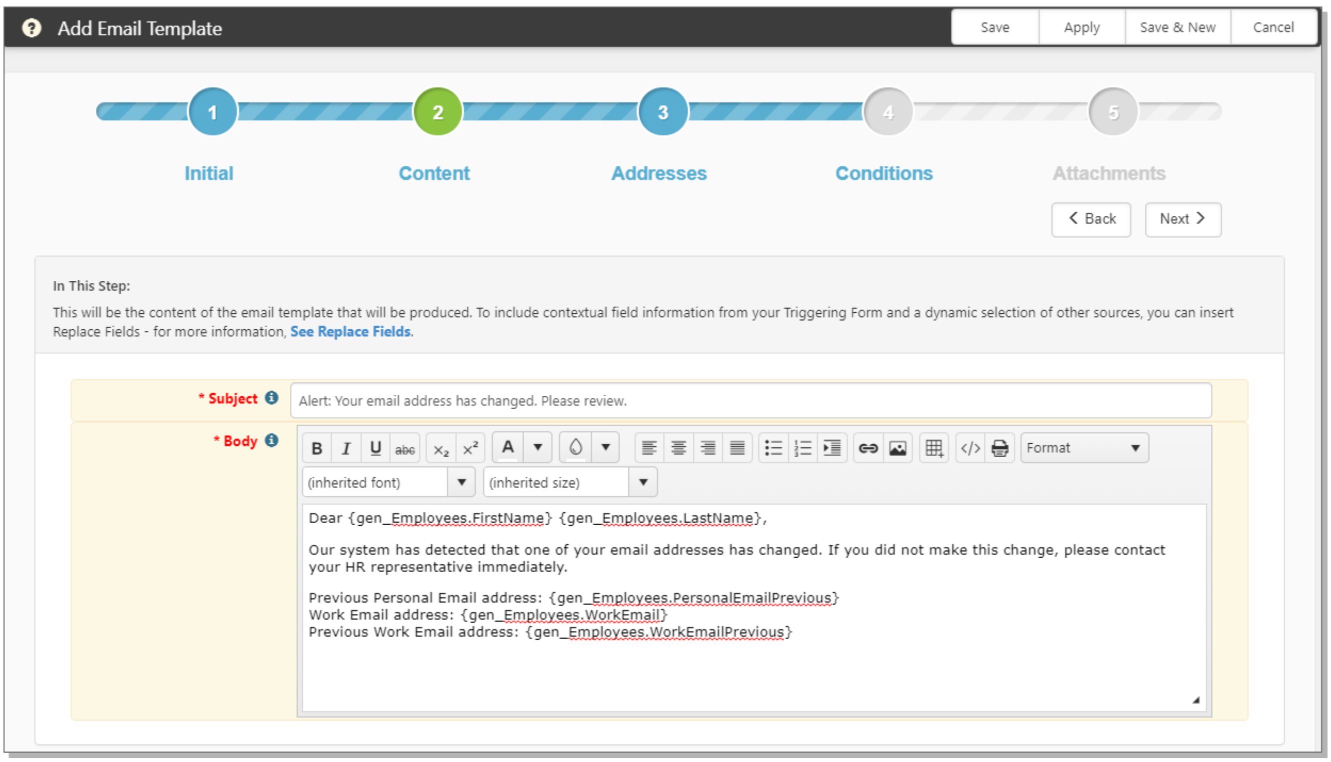
3. Complete **Step 1 Initial**.

Triggering Form	Select **Employee**. The Employee dataform is where the previous email addresses reside.
Template Code	Add a short descriptive code to identify this template, such as **EmailChanged**.
Template Name	Add a descriptive name (this is displayed in the application list), such as **Email address change notification**.
Description	Include a brief description, such as **Employee email address change notification**.
Execute On	Select **Insert or Update**.
Merge Procedure	Select an optional Merge Procedure to provide additional system information for Field Replacement.
Execution Pipeline	Indicates how the data enters ClientSpace. Keep the setting as Default.
Workspace Templates	Select the Workspace Templates that will receive this email. Default is **All Templates**.



4. Click **Next** and complete **Step 2 Content**.

Subject	The subject line of the email that is generated. The email recipients see this subject. For example, **Alert: Your email address has changed**.
Body	This is the body of the email. This field supports rich text, so the email can be branded with links. This is seen by the email recipients. You can use replacement fields to customize the message. To use replacement fields, click **See Replace Fields**. For details about replacement fields, see Replacement Fields.



5. Click **Next** and complete **Step 3 Addresses**.

In this step you add the recipients. You want to select Previous Work and Previous Personal email addresses to ensure that when an employee's email address is changed, the notification is sent the previous email addresses in the event the system is compromised by a hacker. Sending the notification to the changed email (a new email address that could be supplied by a hacker) would potentially never reach the employee. Sending the notification to the previous email, would reach the employee because the previous email is most likely the employee's true email address.

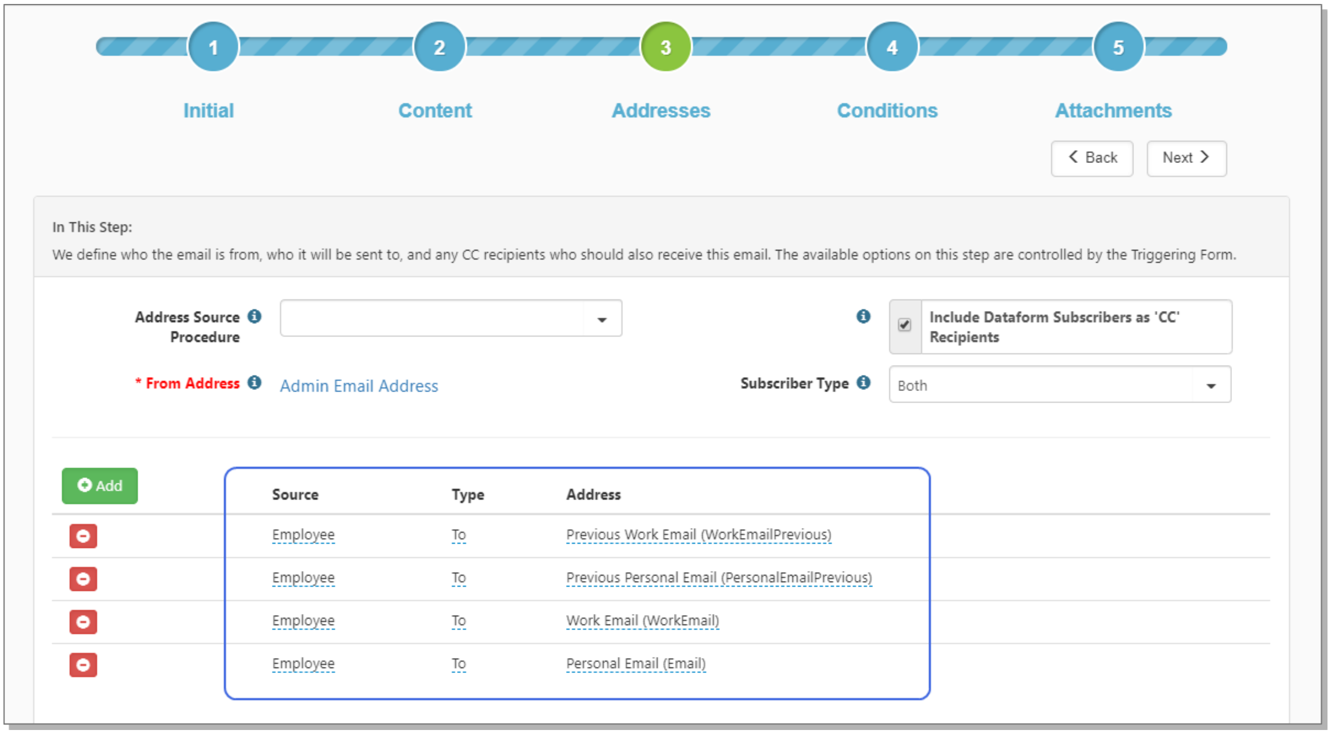
Address Stored	Optional.

Procedure	
Include Dataform Subscribers as 'CC' Recipients	When you select this option it adds anyone who is subscribed to the dataform as CC recipients when this notification is sent. This is in addition to the recipients you configure in the Add section. When enabled (selected), this option defaults **Subscriber Type** to **Both**. • **Internal**: When the email template is triggered, only internal dataform subscribers are notified. • **External**: When the email template is triggered, only external dataform subscribers are notified. • **Both**: If you select Both or leave the field blank, all dataform subscribers are notified.
From Address	This field defaults to Admin Email Address (the application administrator's email address). This is the default admin email set in System Admin > Advanced > App Settings. **To change this setting:** 1. Click the link (**Admin Email Address**). The From Address Options dialog box opens. 2. Select one of the following options: ◦ **Admin Email**: Uses the default admin email set in App Settings. Only User Developers can change this email. For assistance with App Settings, please log a case in the Extranet. ◦ **AdHoc**: Allows you to manually add to the From list by simply typing it in. This should be an active mailbox address so the employee can reply directly to the email if they need to contact you immediately. Additionally, you can specify a friendly name to accompany the email address. For more details about using AdHoc, see Specifying a friendly name as From Address. ◦ **User**: Select a specific user of the system. ◦ **Procedure**: Select an address stored procedure and pick the From address. ◦ **Field on a Form**: Select a dataform from a list of forms in the system that have relevant email fields. You can set user

	fields to values that exist on dataforms across a tabbed set. If the selected user fields are empty, the default value is the system admin. For more details, see From a Field on a Form. 3. When done, click **Ok**.

6. To add the affected employee as a recipient, click **Add**.
A row opens. This is where you specify the Employee's work and personal email address. We recommend that you add four rows for current work, current personal, previous work, and previous personal email addresses. See the example.

Source	For this email template, select **Employee**. This selection makes the Employee's email addresses (Previous Work and Personal) available in the Address column. To include additional team members as recipients, you can select Client Team or Adhoc Email Address. When you select Adhoc Email Address as the Source, you can type a specific email address in Address.
Type	Type can be **To** or **CC**.
Address	The Address you select triggers the employee notification when their email addresses change. Select the previous email addresses to ensure the employee receives a notification if, indeed, the change was an attempt to commit fraud. Add four rows, for current and previous email addresses. • Select **Previous Work Email (WorkEmailPrevious)**. • Select **Previous Personal Email (PersonalEmailPrevious)**. • Select **Work Email (WorkEmail)**. • Select **Personal Email (Email)**.



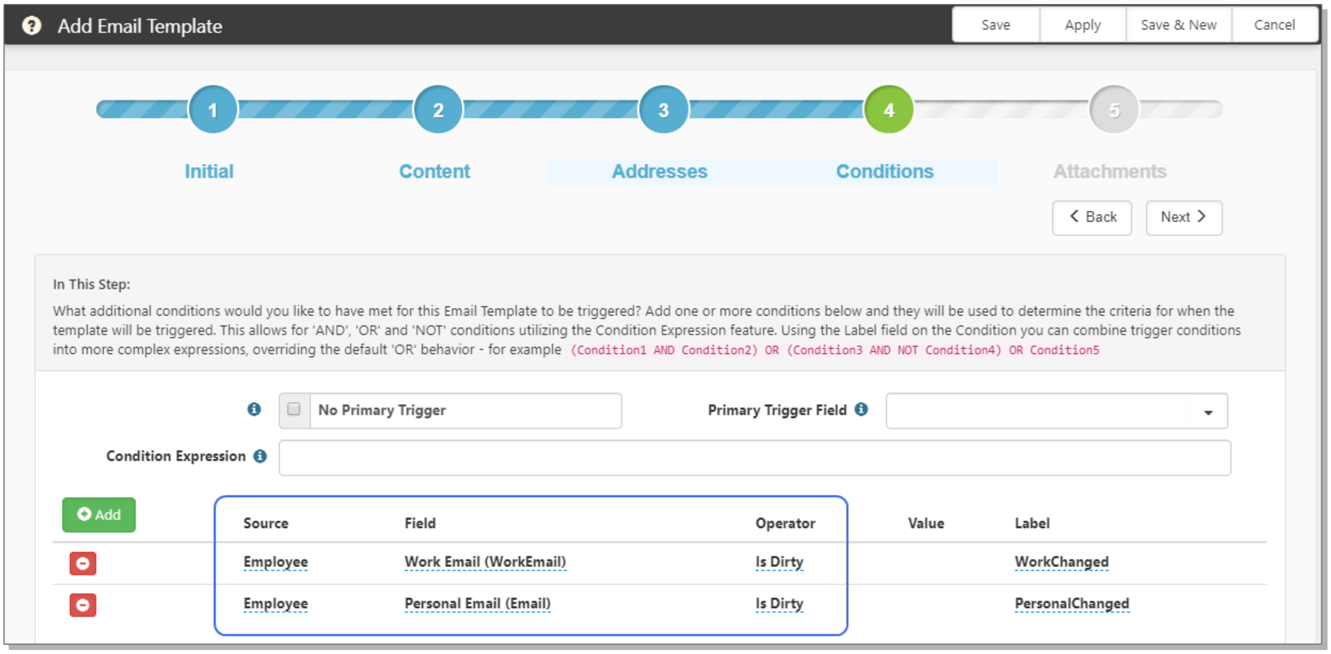
7. Click **Next** and complete **Step 4 Conditions**.

   When configuring the email template, Step 4 Conditions is where you specify a condition for checking if the employee Work and Personal email fields have changed. When these fields change (Value: Is Dirty), that condition triggers the notification to the affected employee.

8. Click **Add**.

   A row opens for adding conditions to include Source, Field, Operator, Value, and Label. You can add multiple conditions.

Source	Indicates the dataform or stored procedure that provides the triggering condition. Select **Employee**. The Employee dataform contains the employee's work and personal email addresses.
Field	This is where you specify the Work and Personal email addresses. Add two rows for: • **Work Email (WorkEmail)** • **Personal Email (Email)**
Operator	Select **Is Dirty**. This value detects when the email address has changed.
Value	Not applicable for email address changes.
Label	Not applicable for email address changes.



9. Click **Next.**
10. Skip Step 5 Attachments.
11. Click **Finish** to save your work.

After you click Finish, you see the Email Template list. This email template does not work just yet because it is unpublished (inactive). You must publish it to make it active.

If you are ready to publish immediately:

1. Select the row for the new email template.
2. Click **Publish**.

   The email template is published.

If you want to publish later:

1. Navigate to the Email Template list again.
2. Clear the **Published** option.

   The email template is unpublished.

Configuring email templates to notify external employees

You can configure an email template to send an email to the related employee on a case. For example, you can send notifications to external employees who submit an inquiry through the

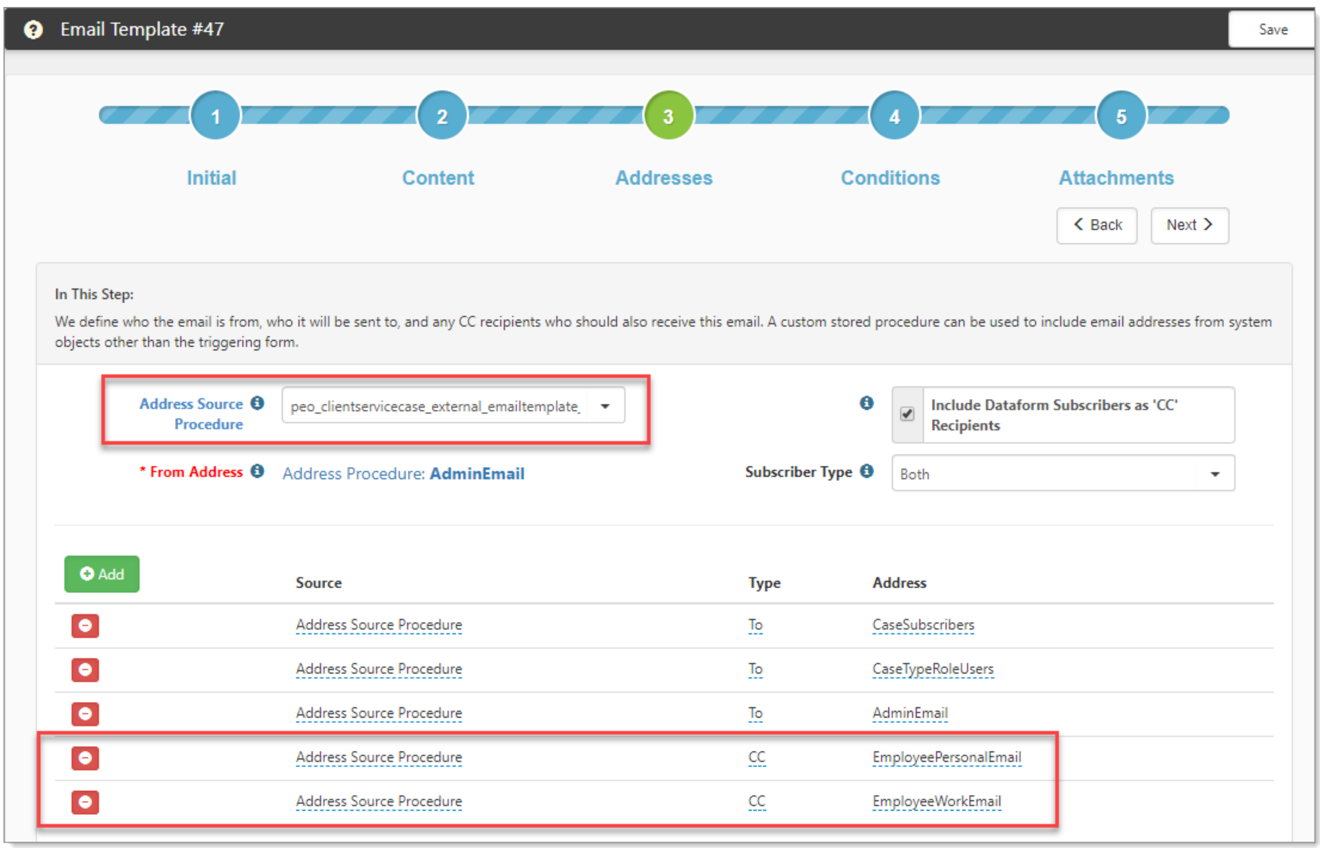
Employee Portal Submit a Question.

The Employee Address stored procedure **peo_clientservicecase_external_emailtemplate_recipient_v2_proc** contains the employee email address fields **EmployeePersonalEmail** and **EmployeeWorkEmail**. You can add these fields to the To or CC Address on Step 3 Addresses.

When configuring for external notification, you can configure your own template (making sure Client Service Case is the Triggering Form) and use the recipient proc on Step 3 Addresses.

To configure external employee notification:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Open any email template created from a Case dataform.
   The email template displays.
3. Select **Addresses** Step 3.



4. In **Address Source Procedure**, ensure that **peo_clientservicecase_external_emailtemplate_recipient_v2_proc** is selected.
5. Click **Add**.

A new row opens. At this step, you add the employee personal or work email as a To or CC recipient.

6. Complete the fields:

Source	Select **Address Source Procedure**. Ensure that you have specified the correct proc in the previous field Address Source Procedure. When the proc is selected along with Address Source Procedure in **Source**, then the external email addresses become available in **Address**.
Type	Select **To** or **CC**.
Address	Select **EmloyeePersonalEmail** or **EmployeeWorkEmail**.

7. Repeat Step 5 to add another row as applicable for To or CC.
8. Click **Save**.

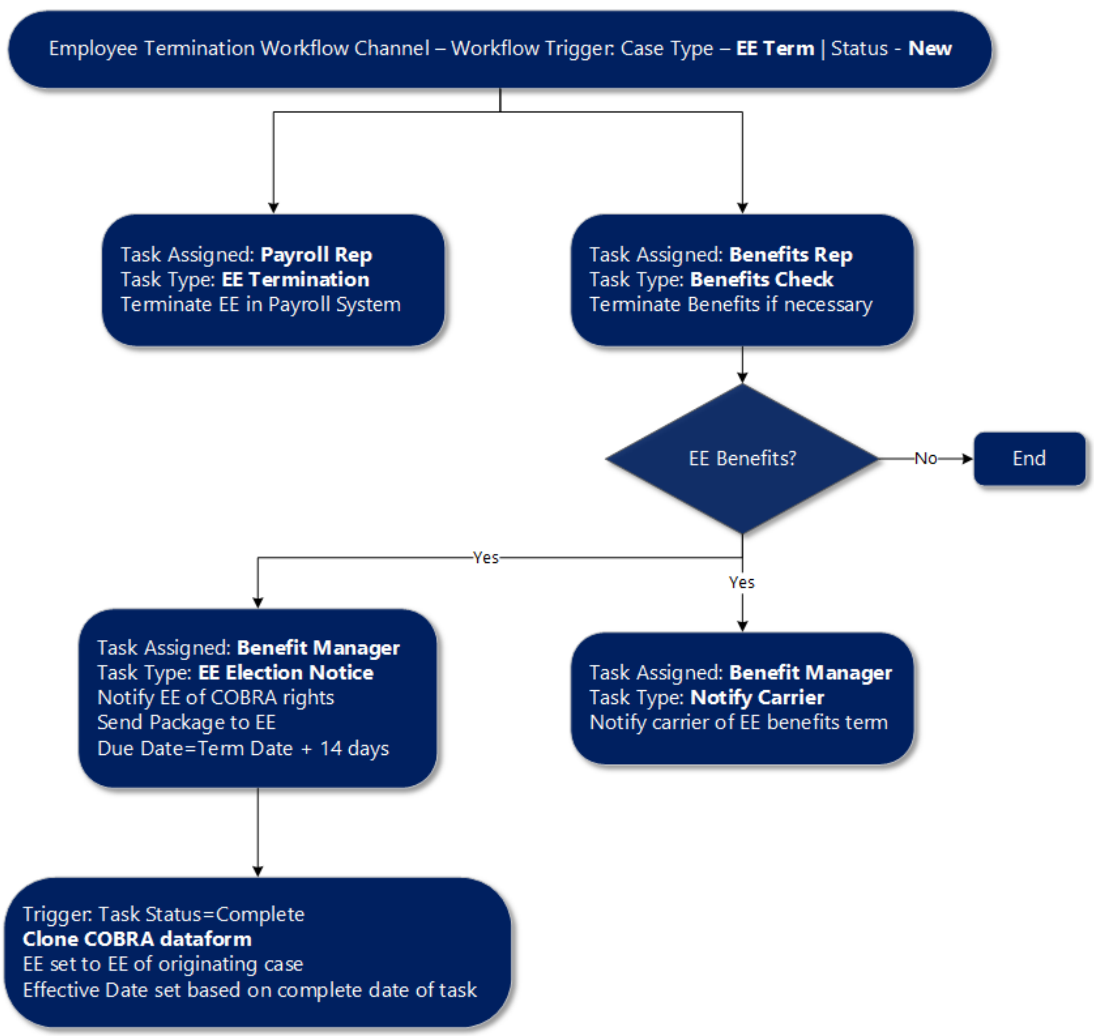
External employees should now be able to receive notifications from Client Service Cases.

Chapter 3
Workflow Channels

Making sure things happen on time and in the proper order can be crucial to your business's success. Workflow Channels enable you to automatically create tasks and dataforms (and associated notifications) based on predefined triggering conditions.

As always, before you begin, it is a recommended best practice to diagram the workflow. Flowcharts can be very helpful in the design process, as long as you ensure that you include the starting point, ending point, steps in between, and the trigger conditions that lead from one step to another.

While the example diagram is simplistic, it demonstrates the power of Workflow



Channels to automate tasks to execute in a consistent and timely fashion, even allowing multiple workflow items to be triggered simultaneously from the same event. Understanding the process through diagramming saves a time and may help you to streamline processes. After you understand the process steps and triggering conditions that you need, you are ready to start.

Setting clone-configurable dataforms

Before you create a Workflow Channel, you must determine if the channel will contain any dataform cloning[1]. If so, you need to determine which fields on the cloneable form will be available for configuration by the system.

To add fields for dataform cloning:

1. Go to **System Admin** ⚙ > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Select the dataform you would like to clone and click **Edit**.
   The Dataform Properties form opens.
3. In **Features**, select **Enable WFC Cloning**.
4. Click **Save**.

Searching Workflow Channels

It is helpful to search the workflow list to find specific items and also to avoid configuring redundant workflows. From the Workflow Channels list, use the Quick Search and More search options to filter the list.

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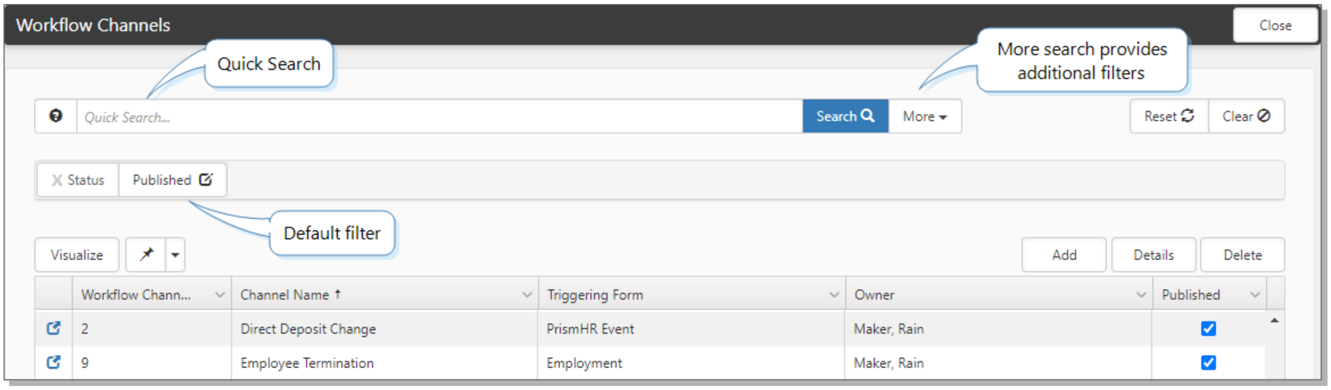
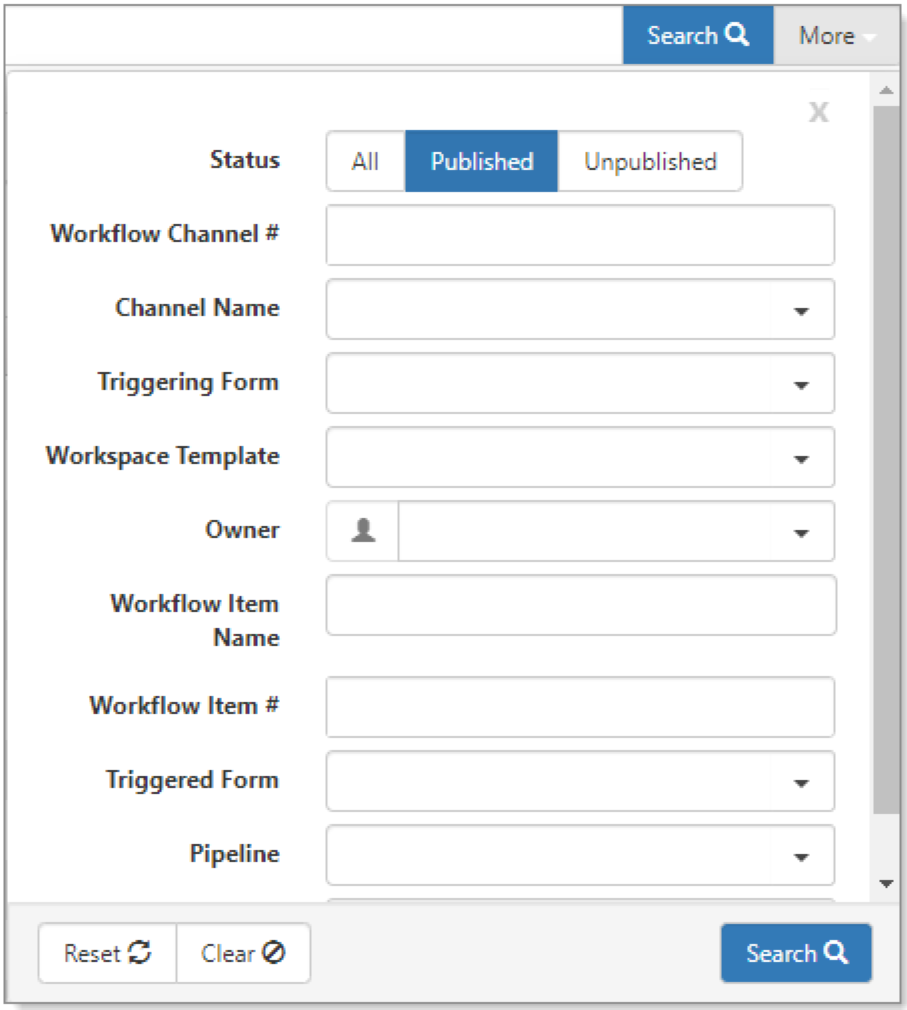
[1]Cloning is when an object is generated by copying a template example of that object. Cloning is often used to provide consistency of data, or for workflow design.



To search Workflow Channels:

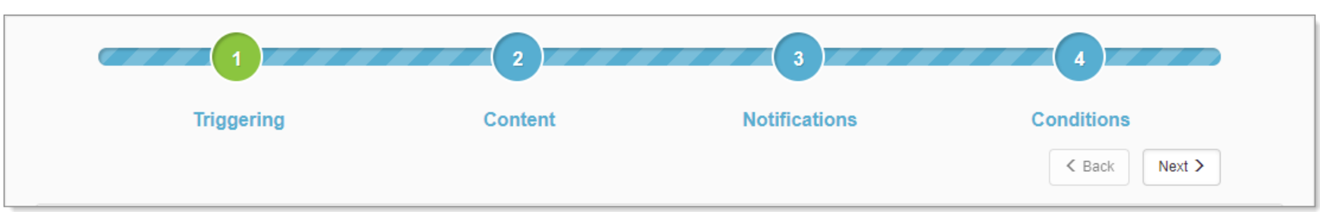
1. Go to **System Admin** > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. In **Quick Search**, you can type text or numbers to find matching entries quickly. Use the % symbol to search fields for records matching the search string.
3. In **More** search, you can further refine the criteria by Workflow Channel #, Channel Name, Triggering Form, Workspace Template, Owner, Workflow Item Name, Workflow Item #, Triggered Form, Pipeline, and Type. The default setting is to search for items with the Status of Published. You can change this to All or Unpublished.



4. Select your criteria and click **Search**.
   The filtered list is displayed.

Configuring your workflow

Configuring a workflow is a four-step process that includes setting up the Triggering, adding Content, adding Notifications, and creating Conditions.



To configure your workflow:

1. Go to **System Admin** > **Workflow Channels**.
   You are presented with a list of **published** Workflow Channels currently configured on your site. For more details about published and unpublished Workflow Channels, see Publishing and unpublishing workflows.
2. If you have a large number of workflows already configured, it is helpful to search the list to ensure that there is not already a workflow configured for your goal. Use the **Quick Search** and **More search** options.
3. To review an existing Workflow Channel, select it and click **Details**.
4. When you are satisfied that there are no conflicts, click **Add** to begin creating your new workflow.
   The Choose Workflow Triggering Type dialog opens with "What type of triggering will the new Workflow use?".
5. Select **Real Time** or **Scheduled**.
   The Add Workflow Channel form opens. The following topics follow the Real Time workflow. For information about scheduled workflows, see Configuring scheduled workflows.

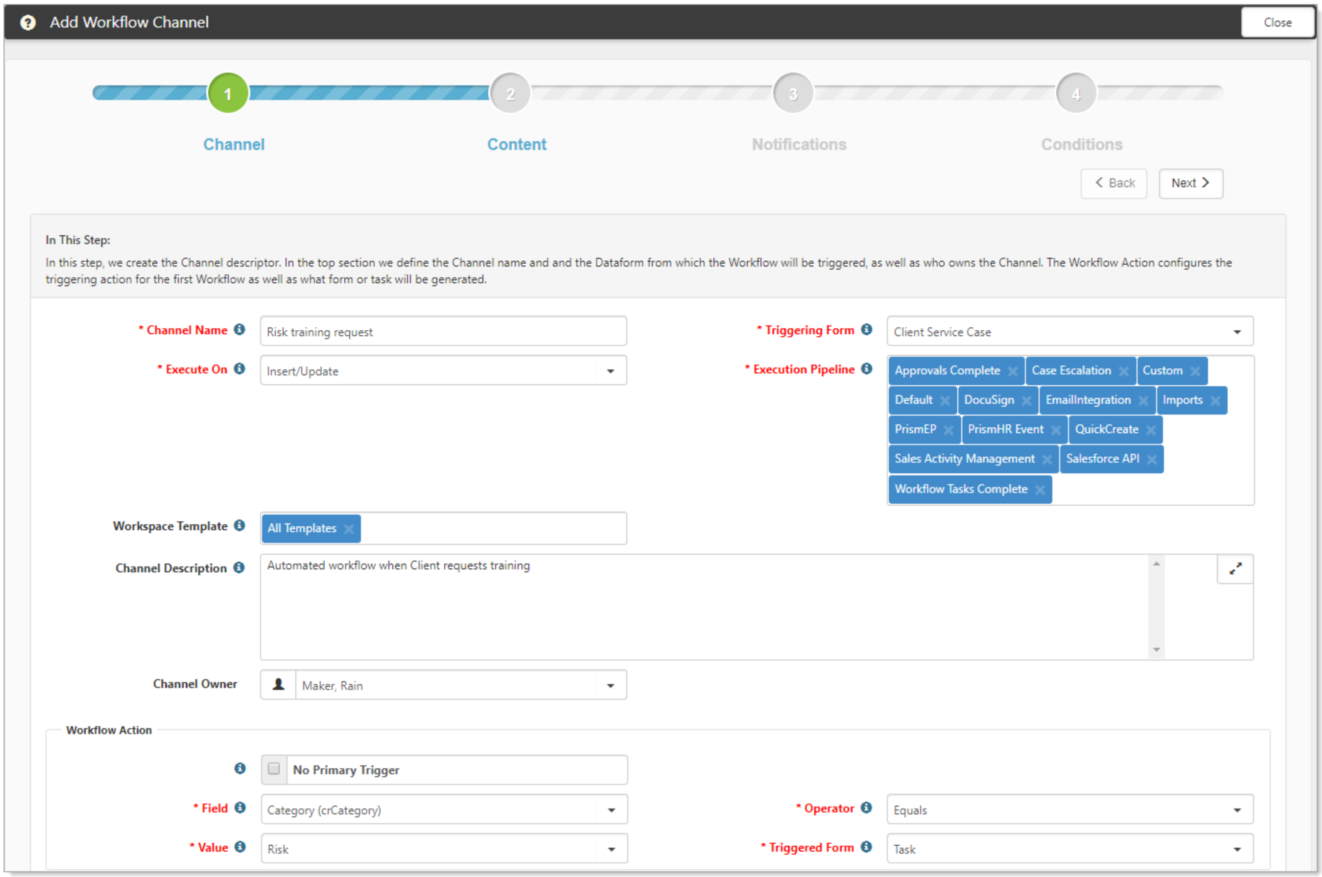
You are presented with a four-step process wizard: Channel, Content, Notifications, and Conditions.

- Step 1: Channel
- Step 2: Content
- Step 3: Notifications
- Step 4: Conditions

Step 1: Channel

From the Add Workflow Channel form:

- Define your channel by giving it a name.
- Select which workspace template it affects.
- Determine how it triggers.



To configure the channel:

1. From the Add Workflow Channel form, complete the form fields.

<table>
<tr><td>Channel Name</td><td>Provide a unique Channel Name. This should be descriptive and short.</td></tr>
<tr><td>Triggering Form</td><td>This is the form that triggers the workflow. Select a form or add a triggering form that is not in the list. The list also includes single dataforms that do not already exist in a workspace when triggering occurs. Selecting a single form is best for custom created single dataforms.

To add a dataform that is not in the list:

1. In Triggering Form, go to the end of the list and select Add Untriggered Form.
The Select an Untriggered Form dialog opens.</td></tr>
</table>

	2. In **Table Name**, select a dataform from the list. 3. Click **Ok**. The selected dataform is marked as triggerable and now appears in the Table Name list.
Execute On	• **Update**: Would you like this to happen on dataform save? • **Insert**: Would you like this to happen during an import? • **Insert/Update**: Or both?
Execution Pipeline	Choose a pipeline. Ensure that anything connected to the workflow (dataforms or imports) is configured to use one of the pipelines configured on the workflow. For questions or help with this configuration, log an Extranet case.
Workspace Template	Select a template to apply to workspaces that will use this workflow. The Workspace Templates field is a multi-select, which allows you to apply a workflow channel across multiple workspace templates. If no specific templates are selected, the Workspace Templates field defaults to All Templates.
Channel Description	Provide a brief description of this channel.
Channel Owner	Defaults to the current user. Set it to the owner of this process.
Workflow Action	This section is dedicated to the primary triggering condition for the channel.
No Primary Trigger	When selected, indicates no single condition must be met to trigger the Workflow. If this option is selected, at least one condition must be provided on the Conditions step. When you select No Primary Trigger, Field, Operator, and Value are not available because they are not applicable.
Field	What field on the triggering form (or HdrAction configured on a link) will fire this workflow? This field must have been changed to the triggering value for the trigger to fire. You can also add a trigger field. **To add a trigger field:** 1. In **Trigger Field**, go to the end of the list and select **Add Untriggered Field**.

	The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as Triggerable. 2. In **Field**, select an entry 3. Click **Ok**. The selected field is marked as triggerable and appears in the Trigger Field list. **Scheduled Workflows** For scheduled workflows, when the triggering form is the home form in a tabbed set, **Field** returns all Date fields across the tabbed form set. **Field** points to a date field on the triggering form.
Operator	Comparison type used to determine if the trigger condition is met. (Contains, Equals, Does Not Equal)
Value	The value evaluated to ensure the trigger condition is met. For system selectors such as lookups, or for Header actions, this is a select list.
Triggered Form	Can be a dataform (with Workflow Cloneable fields) or a task. The selected dataform affects the displayed fields in Step 2 Contents. If the triggered form field is no longer cloneable, a warning message displays: Workflow channel cloning is no longer enabled for this triggered form. If you still wish to use this as your triggered form, go to Dataform admin and check the 'Enable WFC Cloning' checkbox.

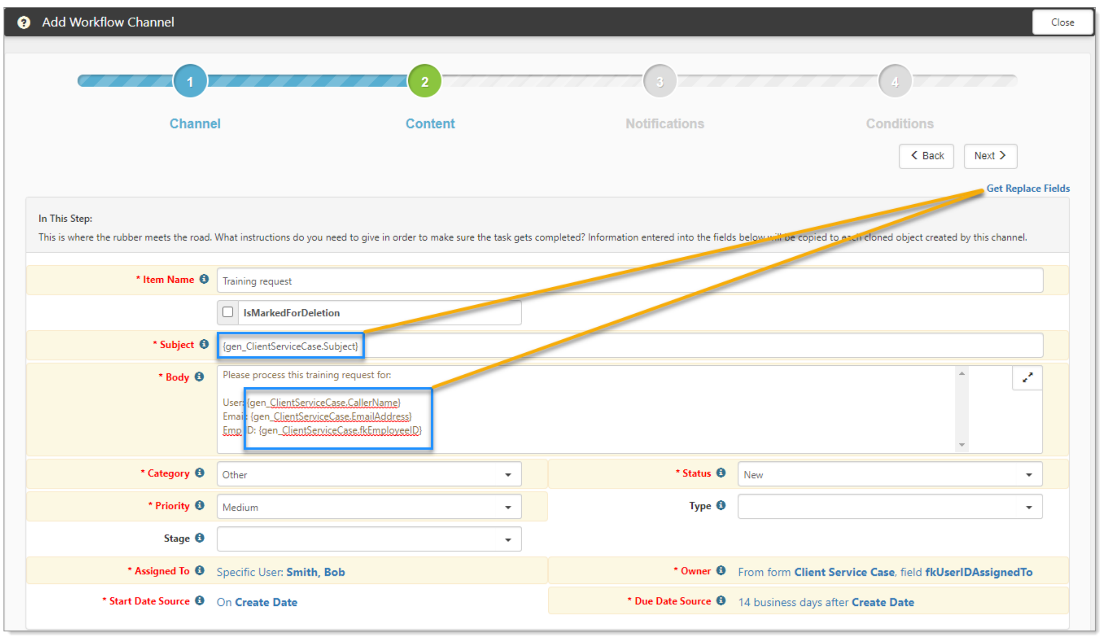
2. When done, click **Next**. Step 2: Content opens.

Step 2: Content

This is where the rubber meets the road. Information entered into these fields is copied to each cloned object created by this step. On the Content step, you can set user fields to values that exist on dataforms across a tabbed set. For more details about selecting users across tabbed dataforms, see Workflow Channels and tabbed dataforms.

The fields that are available for cloning are based entirely on the work done when defining clone-configurable fields (see Setting clone-configurable dataforms). Clone configurable fields follow the datatype of the field and act as those fields do on the dataform. For example, a lookup displays the appropriate values.

Field Replacement



You may have noticed a **Get Replace Fields** link on the Content step. This link allows you to insert field content for Subject and Body from:

- Triggering dataform
- Server data procs
- Any associated tabbed dataforms
- Related Organization and Org Other Info
- Closest dataform ancestor

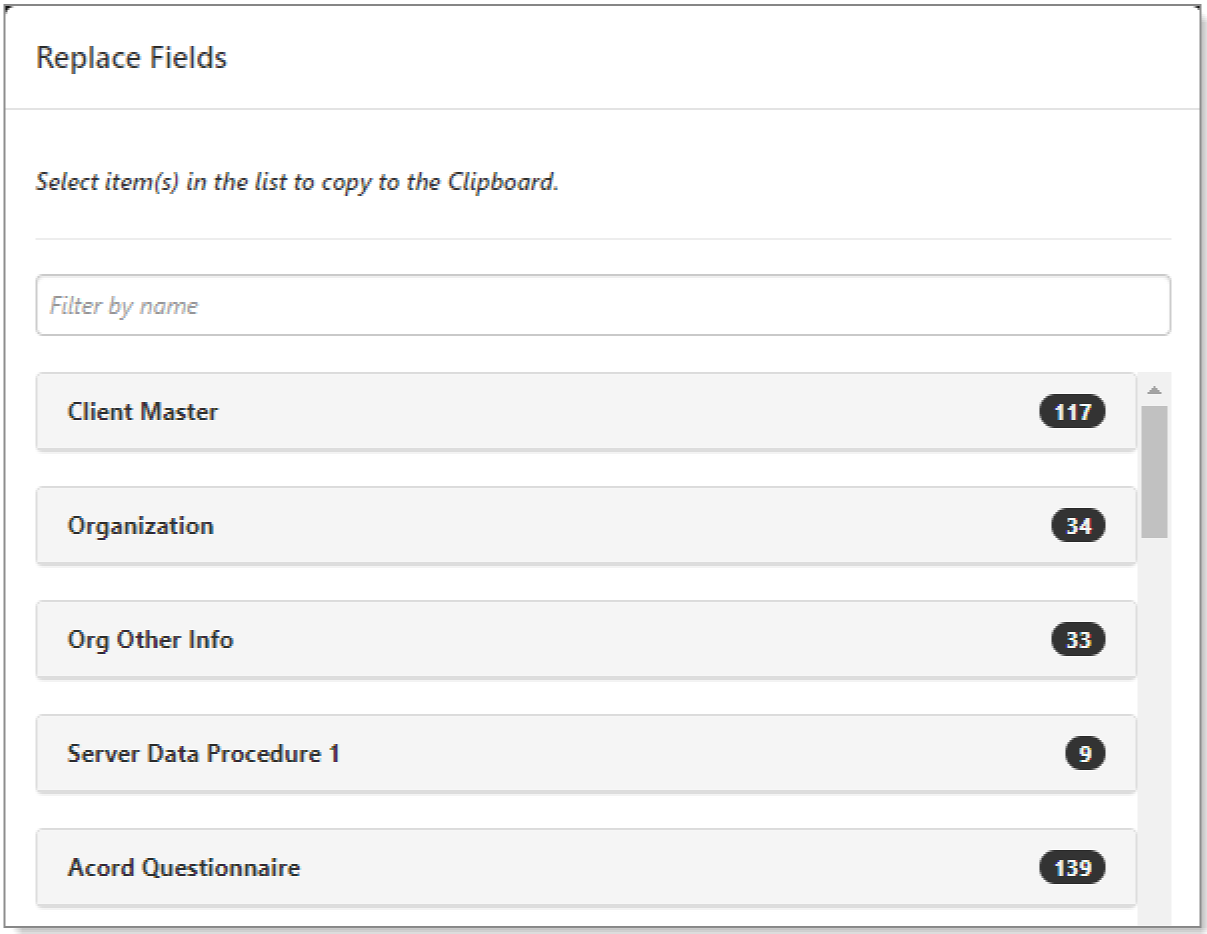
To use Get Replace Fields:

The list can be extensive because it can include fields:

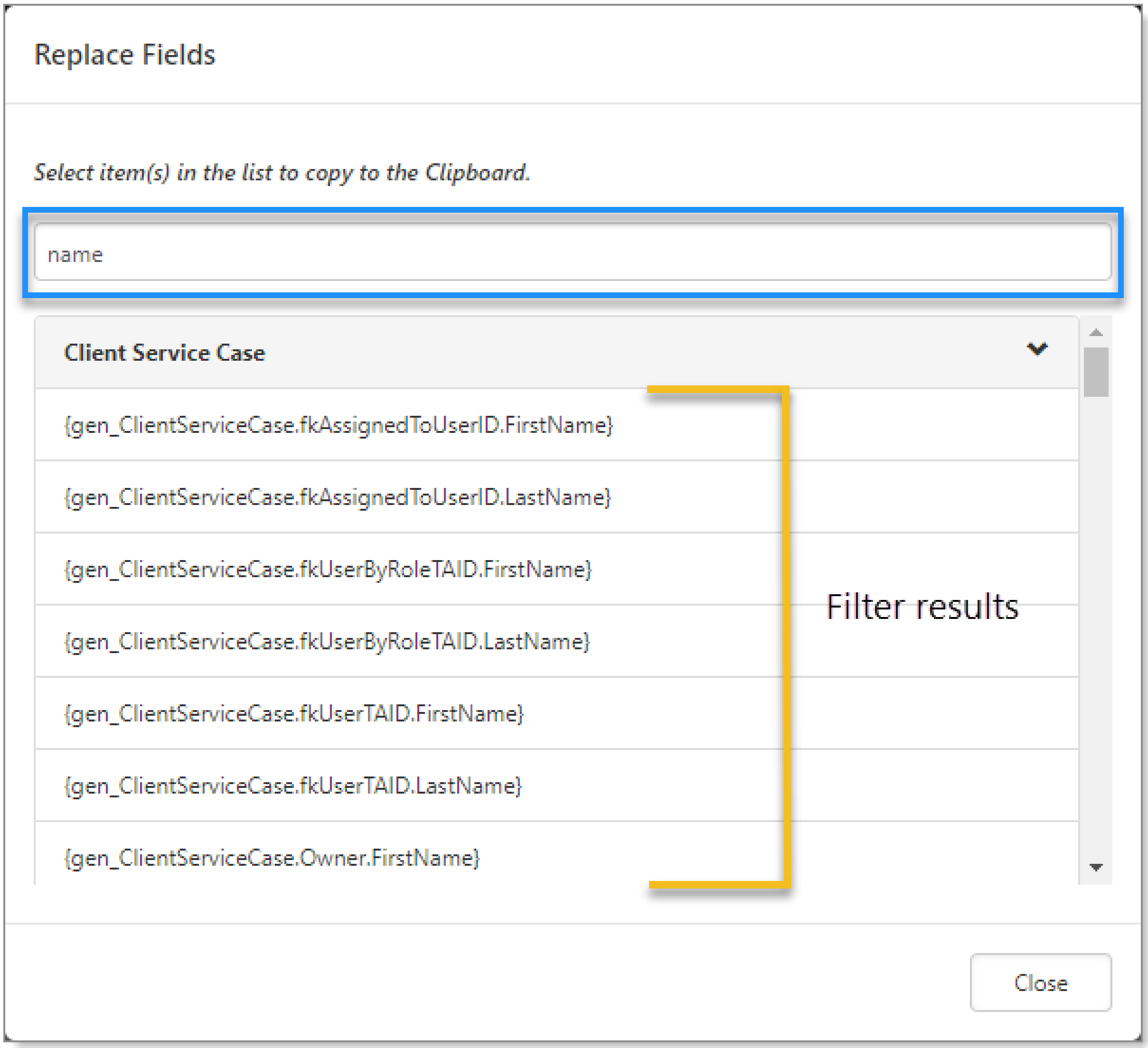
- From the triggering dataform
- From its server data proc
- From any associated tabbed dataform
- From the closest dataform ancestor.
- Field content from the related Organization and Org Other Info

To use replacement fields:

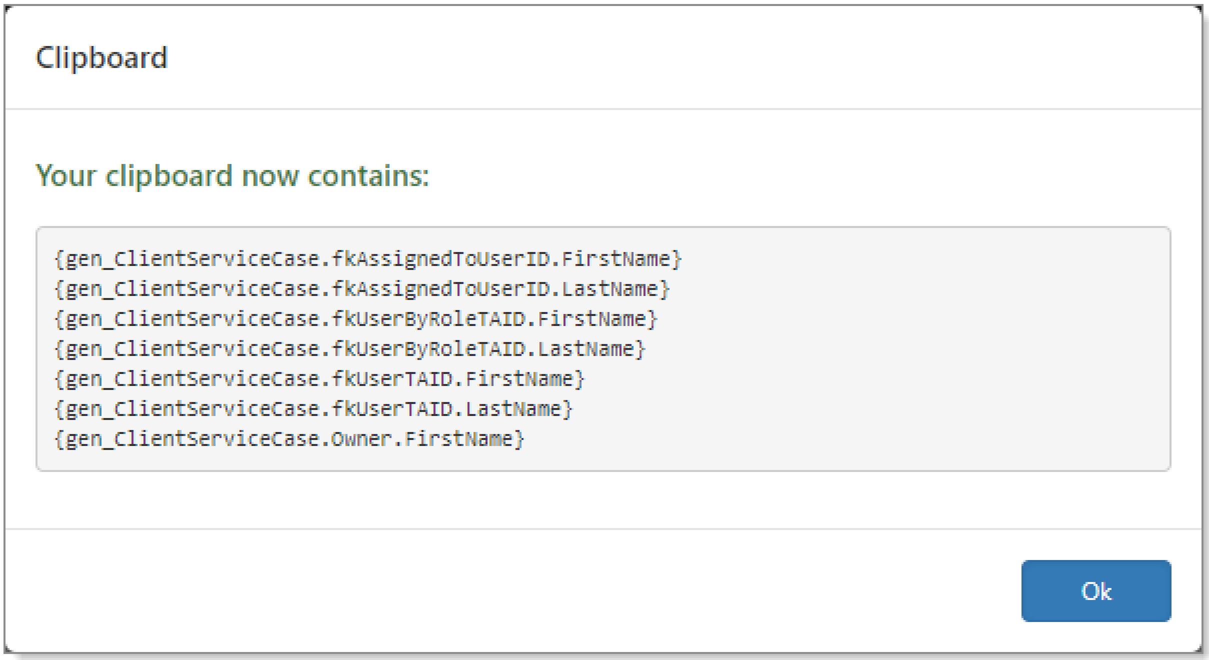
1. For *Email Templates*, in the **Content** step, click **See Replace Fields**. For *Workflow Channels*, in the **Content** step, click **Get Replace Fields**.
   The Replace Fields dialog box opens, displaying fields grouped by source section and expanded.
2. Collapse the source sections to view the count.



3. To search for fields, in the **Filter by name** box, start typing your keyword. As you type, the matching fields display. For example, type **name** and all entries with *name* are displayed.



4. Select as many fields as applicable and then click **Copy**.
   The Clipboard dialog box opens with the selected fields.

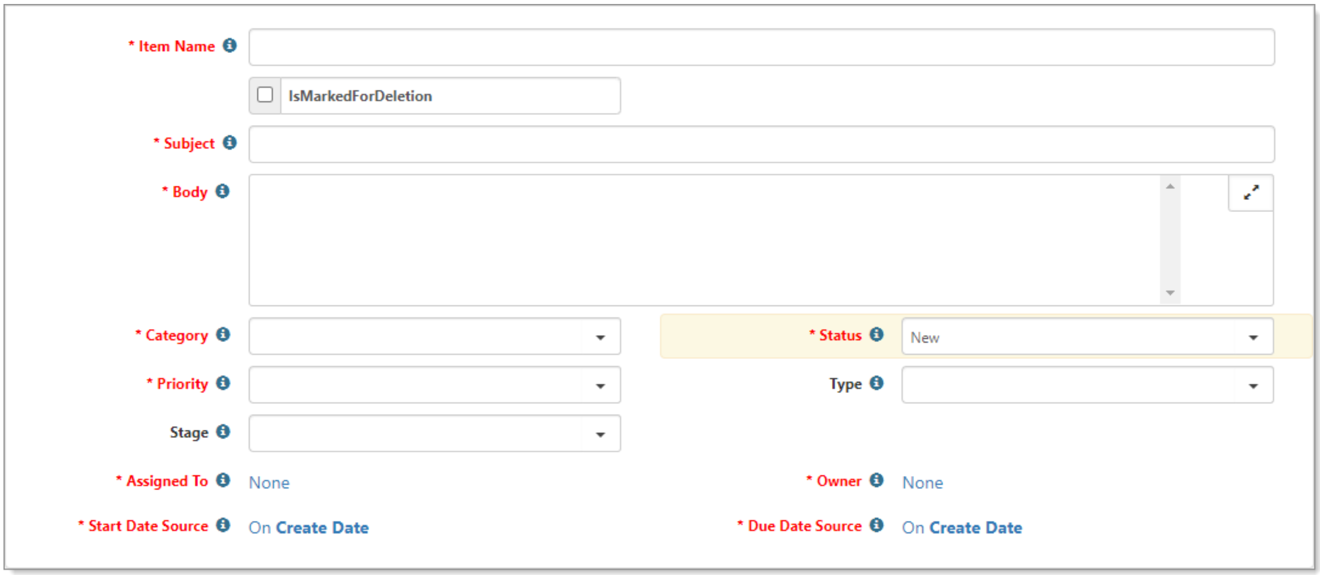


5. Click **Ok**.
6. On the Email Template or Workflow Channel, click in the field (Subject, Body, or Text Area) where you want to insert the replacement fields.
7. Paste the copied fields (**Ctrl+V**).
8. You can move the fields around as appropriate (copy and paste). You can invoke the Replace Fields dialog as often as necessary to paste your required fields.
9. Click **Apply**.

For more details, see Replacement Fields.

Triggered Form: Task

In Step 1 Channel, in Triggered Form, when you select Task, the fields in Step 2 are as follows.



1. Complete the fields:

Item Name	Provide a short descriptive name for what this workflow object is.
IsMarkedForDeletion	When this option is selected, the Workflow Channel clones the task with this field selected. Then, when the scheduled process, Delete Marked Tasks, runs, it finds all the tasks with this field select, and deletes the task.
Subject	Subject Line that displays on the task. This field supports field replacement. See Field Replacement.
Body	Include any instructions that you feel could be helpful. This field should contain information to provide steps to complete the task. This field supports field replacement. SeeField Replacement.
Category	Choose the appropriate Task Category.
Status	Select the appropriate Task Status.
Priority	What is the criticality of this task?
Type	Within the category, what is the task type?
Stage	Also called workflow. Where in the process does this task fall?
Assigned To, Owner	For Assigned To, select the person responsible for accomplishing this task from the following options. For Owner, select an owner.

<table>
<tr>
<td></td>
<td>
To change Assigned To and Owner:

Select Current User.
The Assigned To or Owner Options dialog box opens.
Select an option:

Current User: The logged in user who triggers the task.
Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.
From a Field on a Form: Any user field on the triggering dataform is available.

When you select From a Field on a Form, Dataform is enabled.
Select the Dataform that has a field from which to select a User. Field becomes available.
Select a user field.

Click Ok.
You are returned to the Workflow Channel form.

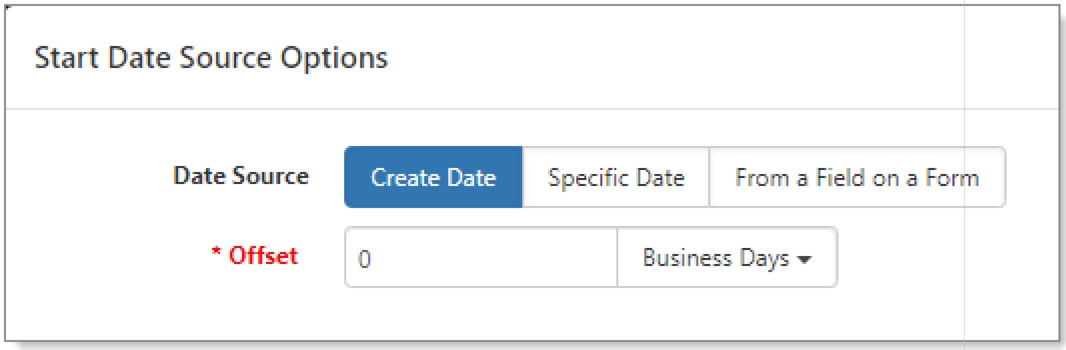
For details about referencing users from tabbed dataforms (parent and child dataforms), see Workflow Channels and tabbed dataforms.
</td>
</tr>
<tr>
<td>Start Date Source, Due Date Source</td>
<td>
Date options are Create Date, Specific Date, and From a Field on a Form. Additionally, you can select the Offset as Days, Weeks, Months, Years, Business Hours, Business Days, Beginning of Month, End of Month, Beginning of Year, or End of Year.

Due Date Source: Tasks created by this channel can have their due date set by the task create date, or to a specific date from a dataform field. Choose from the create date of the task or a Date type field on the triggering dataform.

To configure dates:

Select On Create Date.
The Date Options dialog box opens.

</td>
</tr>
</table>



For date fields that are not required, the None option becomes available. For required (red ink) date fields, None is not an option.

2. Select an option:
   - **Create Date**: Default value. Optionally, you can use Offset to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **Specific Date**: Enables the Date field where you can use the date picker. Optionally, you can use Offset to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **From a Field on a Form**: Includes the triggering form for that workflow, all single dataforms with date fields, and child tab forms when the Triggering Form (from Step 1) is a home form of a tabbed set.
     - When you select From a Field on a Form, **Dataform** is enabled. Select the Dataform that has a date field.
     - When you select a dataform, **Field** becomes available. Select a date field.
     - Optionally, you can use **Offset** to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **Offset**: You can use Offset with Create Date, Specific Date, and From a Field on a Form. Default value is 0 Business Days.
3. When ready, click **Ok**.

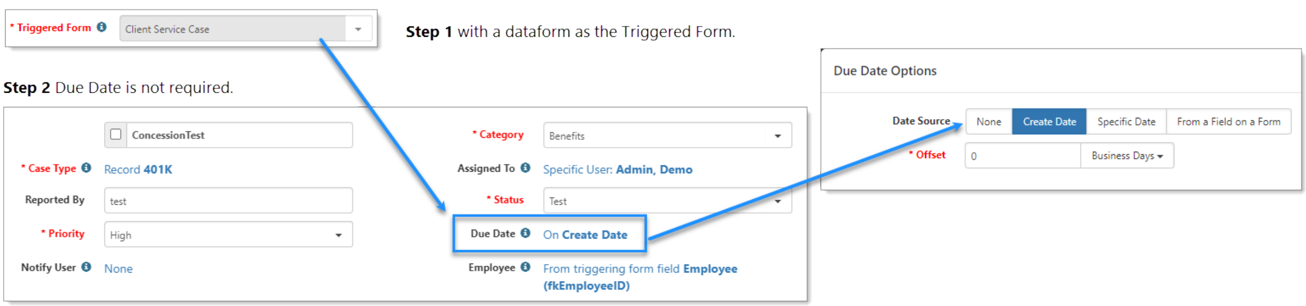
You are returned to the Workflow Channel form, where the Start and/or Due

	Date Source fields show (as applicable): *nn* Business Days after Create Date, *nn* Business Days after Specific Date, *nn* Business Days after Field Label (Contract Effective Date).

Triggered Form: Dataform

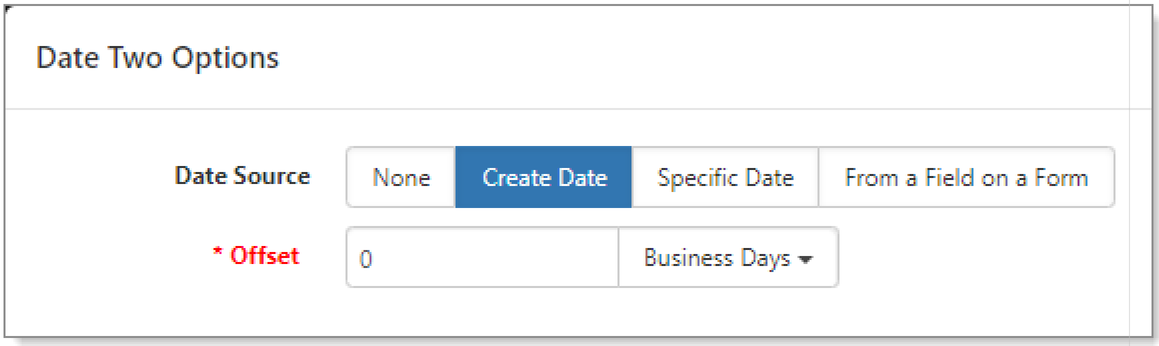
In Step 1 Channel, in Triggered Form, when you select a dataform, the available fields in Step 2 are variable and dependent on the specific form fields. You will only see fields for the form you are cloning, and the fields have to be marked as cloneable for that form.

Additionally, date fields can vary. Some dataforms may have Date One and Date Two, and others may have Due Date. On Step 1, when the Triggered Form is a dataform, and the date field is not required, you have the option to set the On Create Date to None.



2. In Step 1 Channel, in Triggered Form, if you selected a dataform, the displayed fields vary, depending on your selections in Step 1. The following fields focus on date.

Item Name	Provide a brief descriptive name for what this workflow item does.
Date One, Date Two, Due Date	Date field names vary by dataform. Date fields in red ink are required and black ink are not required. When the date field is not required, an additional option of None is available. **To configure a date field:** 1. Select **On Create Date**. The Date Options dialog box opens.



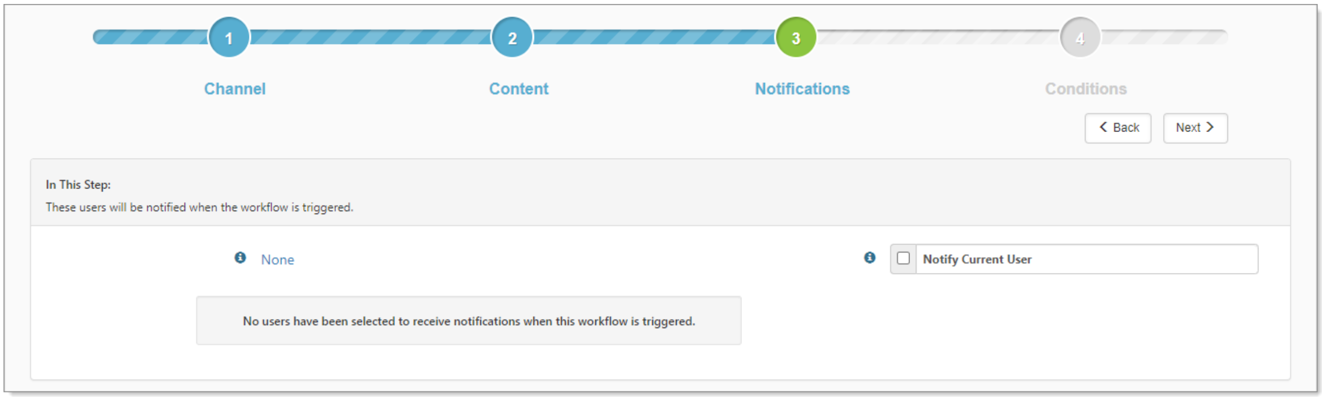
For date fields that are not required, the None option becomes available. For required (red ink) date fields, None is not an option.

2. Select an option:
   - **None**: Indicates the date does not require a value when configuring. The field will be empty when the workflow channel is triggered.
   - **Create Date**: Default value. Optionally, you can use Offset to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **Specific Date**: Enables the Date field where you can use the date picker. Optionally, you can use Offset to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **From a Field on a Form**: Includes the triggering form for that workflow, in addition to all single dataforms with Date fields.
     - When you select From a Field on a Form, **Dataform** is enabled. Select the Dataform that has a date field.
     - When you select a dataform, **Field** becomes available.
     - Optionally, you can use **Offset** to specify a number of days, weeks, months, years, hours, end of month, beginning of year, or end of year.
   - **Offset**: You can use Offset with Create Date, Specific Date, and From a Field on a Form. Default value is 0 Business Days.
3. When ready, click **Ok**.

3. When ready, click **Next**. Step 3: Notifications opens.

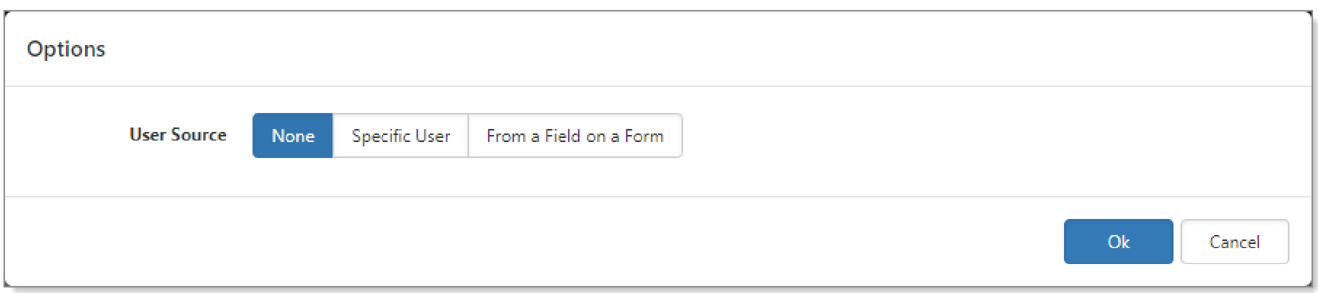
Step 3: Notifications

In this optional step, you can select users to notify when the workflow is triggered. You can notify the current user (logged in user) as well as other users.

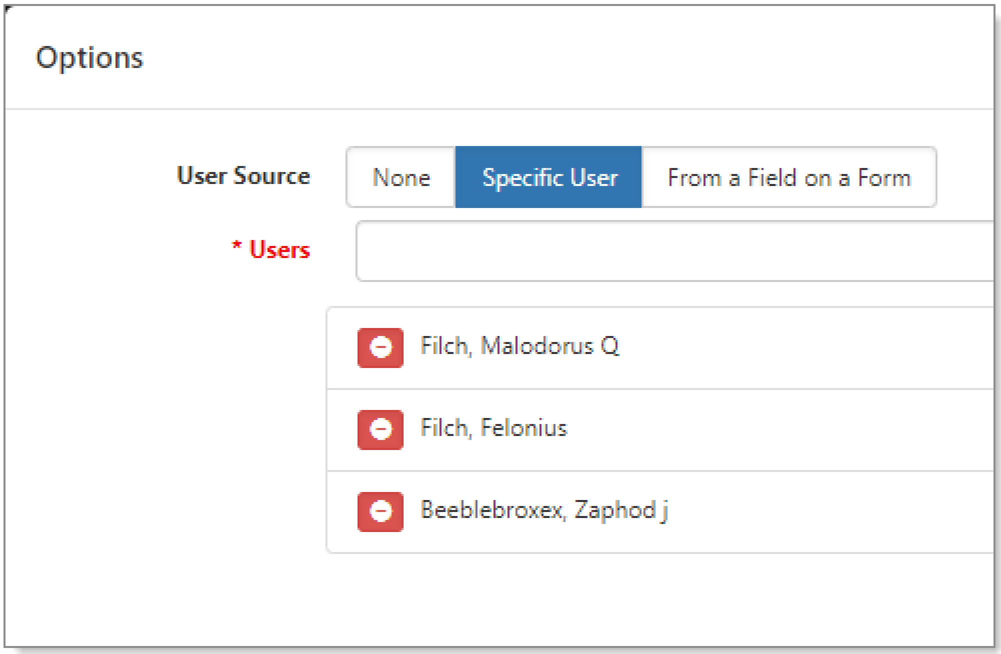


To add notifications:

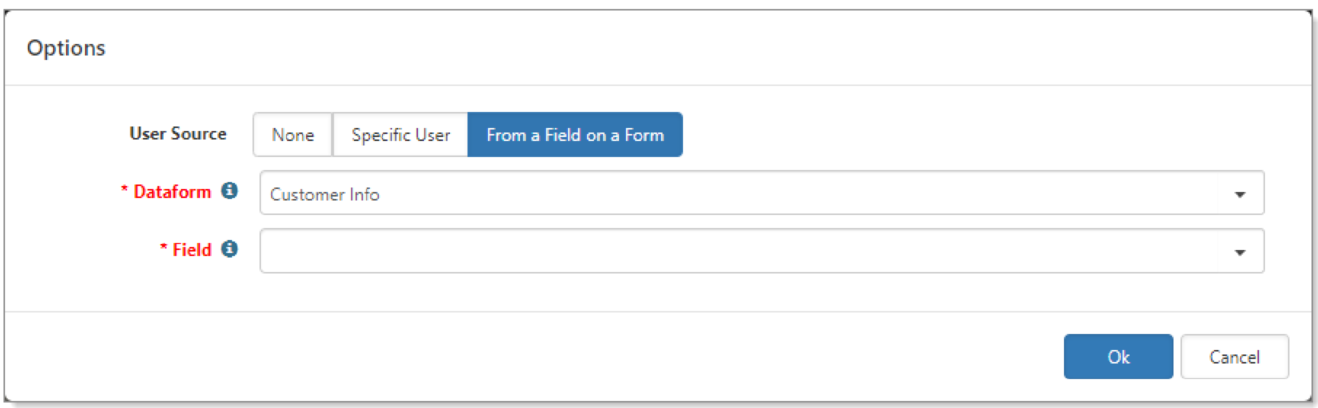
1. To notify the current user (the triggering user), select **Notify Current User**.
2. To notify additional users, click **None**.
   The Options dialog box opens, with User Source options: **None**, **Specific User**, and **From a Field on a Form**.



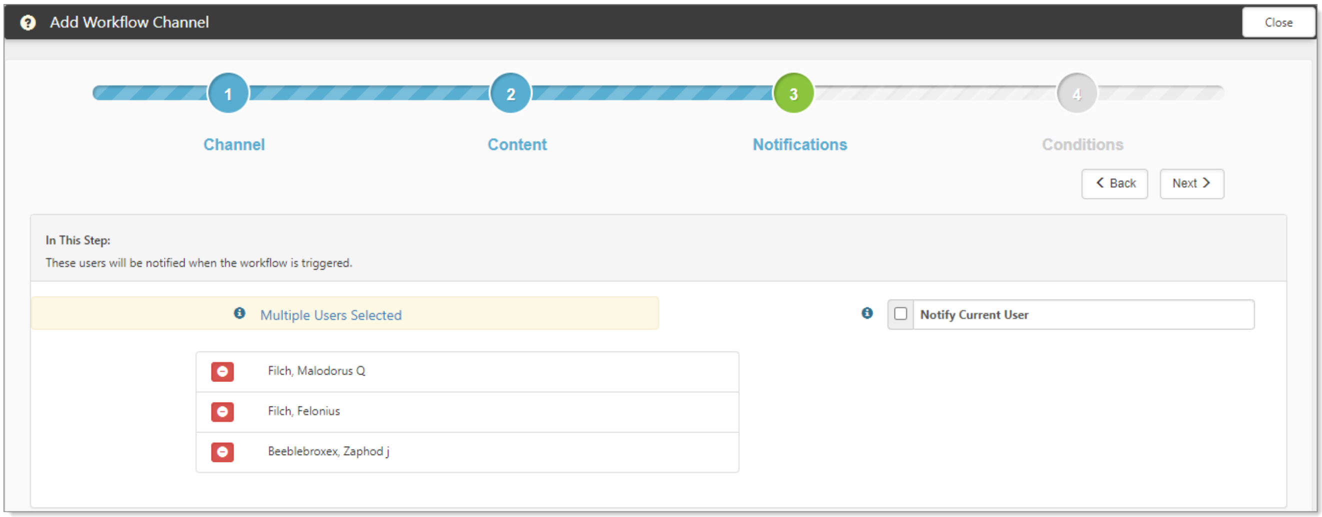
- For **Specific User**, select a **User** and click **Ok**. You can select multiple users to receive notifications. As you select users, the list is displayed.



- For **From a Field on a Form**, you have additional choices — from which Dataform and then which Field. The Dataform selection drives the items in Field. From a Field on a Form allows you to select users across tabbed dataforms. For more details about selecting users across tabbed dataforms, see Workflow Channels and tabbed dataforms.



3. When ready, click **Ok**.
   The notification list displays the users that are to receive the notification.



4. To remove users from the notification list, click  (**Remove**).
5. When you are ready to move to Conditions, click **Next**. Step 4: Conditions opens.

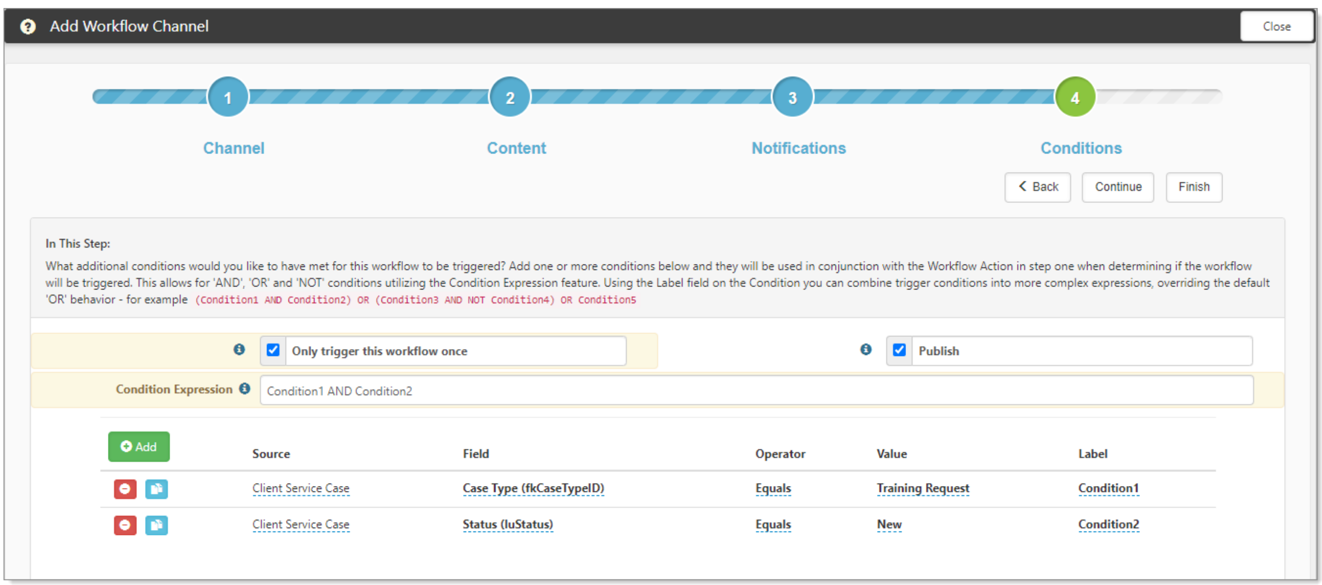
Step 4: Conditions

In this step, you can add one or more conditions to use in conjunction with the Workflow Action in Step 1 when determining if the workflow is triggered. What additional conditions would you like to have met to trigger this workflow?

Trigger on number of days from a date: You can set a condition based on the number of days/months/years from a date. This feature uses the Field, Operator, and Value columns. See To trigger conditions based on number of days/months/years from a date:.

Clone a trigger: For triggers that are similar, use the Clone feature to copy a trigger condition. See Cloning a trigger condition.

Decide when you want to publish: When you reach the end of the initial item of a Workflow Channel, you have the option to go back a step, continue, or finish. These options allow you to decide when you want to publish the newly added Workflow Channel. See Completing the configuration.



To configure Conditions:

1. Complete the form:

Only trigger this workflow once	Sometimes you only want a workflow to happen once. For example, the first time an employee marital status changes, you may want to send a notification about how this can affect their tax status and W4. You can use

	this option to ensure that this triggering condition is unique and only happens once. When a single dataform is selected as the Triggering Form in Step 1, then **Only trigger this workflow once** is enabled (selected) and marked read-only. When a single dataform is selected as the Triggering Form, its respective Replace Fields and Condition options are removed from the workflow item. This works for Scheduled Workflows as well. Single dataforms such as Client Master and Client Team are not candidates for cloning because these forms have a one-to-one relationship with the workspace.
Publish	By default, this option is enabled. When the configuration is complete and you click Continue or Finish, a prompt is displayed asking if you want to publish.
Condition Expression	The Workflow Action condition was set in Step 1. This is the dataform or task field (or HdrAction) that when changed, it triggers the workflow. • In Step 4, you can also add more complex triggering conditions to this primary condition by selecting dataform/task fields and setting a Value, Operator, and Label. • These conditions are combined with the Workflow Action set in Step 1 using an implied AND. • If the Condition Expression field is not filled, the additional conditions that are set in Step 4 are all treated as OR conditions. Example: The Workflow Action **AND** Condition 1 **OR** Condition2 **OR** Condition3. • The Condition Expression field allows for AND as well as OR conditions using the Condition Expression feature. • Using the Label field on the Condition, you can combine trigger conditions into more complex expressions, overriding the default OR behavior combined with the implied AND for the Workflow Action. For example, the Workflow Action AND (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. For a deeper discussion about Condition Expressions, see Condition expressions.

2. To add conditions, click **Add** and complete the following fields:

Source	Source is a list of triggering options based on the Workflow Action triggering form. The Source list includes all active tabbed forms included in the tabbed set when the triggering form is the home form of a tabbed set. For details about tabbed dataforms, see Workflow Channels and tabbed dataforms.
	• For a workflow action based on a **dataform**, this includes the triggering form and any server data procs associated with this form. Additionally, all active, triggerable, single forms are available in the application.
	• For a workflow action based on a **task**, you can use fields from that task or fields from any single dataform from the workspace.
	• You can configure conditions for task workflow channel items from the most recent parent dataform, even if your tasks are multiple levels deep. This enables you to logically refer to the child dataform. (For example, a milestone triggers a Case, and the Case triggers multiple layers of Tasks, all Tasks can reference the Case).
	  • Source includes the most recently referenced dataform that would trigger the initial task (single or multi).
	  • Condition Expressions operators (AND, OR, and NOT) work across multiple dataforms.
	  • IsDirty does not appear in the trigger operator list because the task can be separated from the dataform by several other tasks; the dataform may not be dirty.
	  • The Add Untriggered functionality is available when adding fields from this source.
	  • If the most recent dataform is the main triggering dataform for the workflow, the condition Source is **Channel Trigger: <NameOfTriggeringForm>**.
	  • If the most recent dataform is a cloned dataform workflow item, the condition Source is **Workflow #<ItemNumber>: <ItemName>**.
	• HdrAction is only available when the Source is the parent triggering form.

Field	If you selected either a dataform or task for Source, Field contains an appropriate list of fields for the triggering task or form. You can add a

	triggered field and also use multi-lookup fields (**Multi Lookup (MultiLookup)**) as triggering conditions. A triggered form field is only editable on Add. Trigger Fields also support parent form fields (only available operators are empty, not empty, and dirty). For Source such as Client Master, you can select Additional Record Information. Additional Record Information is for determining who made a change to employee information, such as email address changes. See Tracking data modifications in PrismHR. **To add a trigger field:** 1. In **Field**, go to the end of the list and select **Add Untriggered Field**. The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as triggerable. 2. In **Field**, select an entry and click **Ok**. The selected field is marked as triggerable and now appears in the Field list.
Operator	Operator is based on the type of Field selected but ranges from IsEmpty (nothing in a field) to a specified value. Each value from a **Multi Lookup** field can be added as a separate = condition. This supports complex AND, OR, and NOT conditions as well. Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
Value	This is the value you are comparing the field to when attempting to meet a triggering condition.
Label	Label is used when combining conditions into a complex Condition Expression. **Note**: If a Label is not used in a Condition Expression, then the condition is an implied OR. In the example, if the Condition Expression was blank, this workflow would be triggered in the following manner: Workflow Action Trigger (Step 1) AND Condition1 OR Condition2

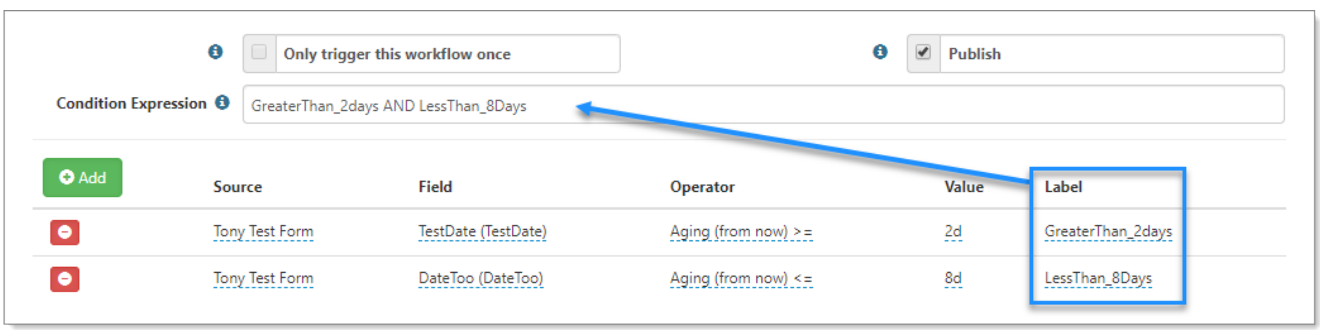
To trigger conditions based on number of days/months/years from a date:

3. Complete the form fields:

Field	Select a date datatype field. This action makes the Aging operators available in **Operator**.
Operator	Select one of the following: • **Aging (from now) > =** ◦ Greater than or equal to the number of days/months/years in **Value**. • **Aging (from now) < =** ◦ Less than or equal to the number of days/months/years in **Value**. The less than operator requires that the evaluated date occurs between the calculated date and today. It has to be between the date set in the configuration. For example, if the value is 6d, the from date must be between 6 days ahead and today.
Value	Type a number accompanied by: • **d**: for days • **m**: for months • **y**: for years

Putting it all together

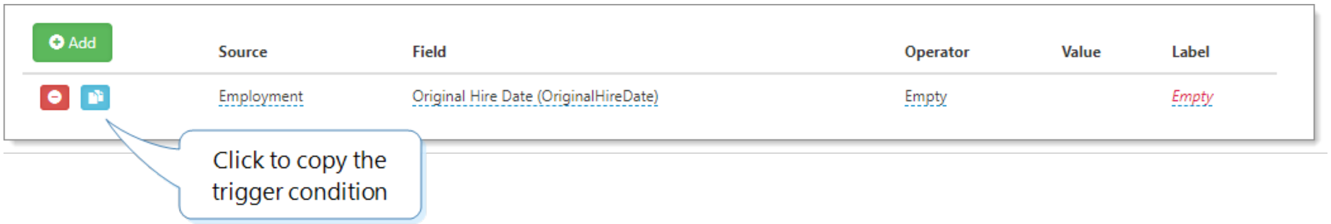
The following example illustrates two conditions: GreaterThan_2days and LessThan_8Days. The Condition Expression is stated as GreaterThan_2days AND LessThan_8Days. For an aging evaluation, this condition requires more than 2 days and less than 8 days.



These trigger conditions can be a bit complex. If you need assistance, please log an Extranet case.

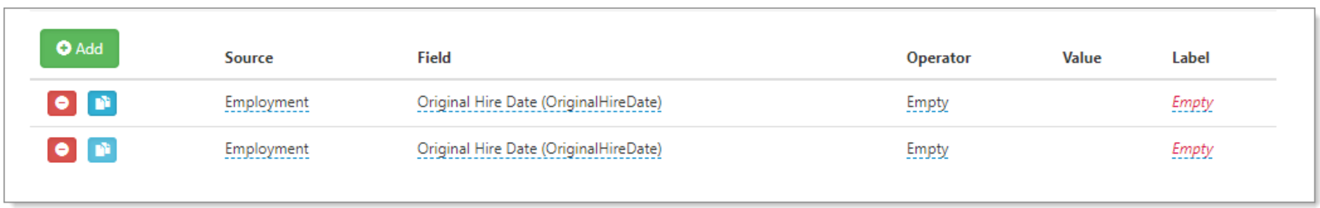
Cloning a trigger condition

To save some time, you can clone a trigger condition and then edit as appropriate.



To clone a trigger:

1. In the **Add** section, locate an entry that you want to copy.
2. Click **Clone**.
   A new row opens, with the trigger condition copied. Source, Field, and Operator are copied.



3. You can now edit the new condition as appropriate.
4. Click **Apply** or **Save**.

Completing the configuration

You can decide the next action: Back, Continue, or Finish.

To complete the configuration:

1. When ready, you can click **Back**, **Continue**, or **Finish**:
   - Click **Back** to return to the previous step of the Workflow item.
   - Click **Continue** and respond to "This Workflow Channel is unpublished. Would you like to publish?" with the options **Yes** or **No**. Either selection takes you to the first step of the dependent Workflow item (the next item in the workflow). This allows you to add cascading steps that trigger from the workflow you just created.
   - Click **Finish** and respond to "This Workflow Channel is unpublished. Would you like to publish?" with the options **Yes** or **No**.
     - **Yes** returns you to the Workflow Channel search list with the new Workflow Channel in a published state.

  - **No** returns you to the Workflow Channel search list with the new Workflow Channel in an unpublished state.

What's next?

You can publish or unpublish from the Workflow Channels list. See Publishing and unpublishing workflows.

Condition expressions

Condition expressions are used in email templates, workflow channels, widget layouts, and custom links. Condition expressions are used to control when an event or action is triggered.

Condition Expressions use Labels from Display Conditions along with AND, OR, and NOT operators to control precedence and sequence.

- The **AND** operator specifies that all specified conditions must be met for a query to return true. The AND is exclusive. AND narrows a search by telling the database that **all** keywords used must be found.
- The **OR** operator specifies that if one of two or more conditions is met, then the query is true. The OR only needs one data point to be present. OR broadens a search by telling the database that **any** of the words it connects are acceptable.
- The **NOT** operator allows you to exclude items that are not relevant to your search. NOT narrows your search by telling the database to **eliminate all terms that follow it**.

AND expressions

AND expressions are used when you want to include all conditions. For example, consider an expression that specifies that the month must be January and the day of the week must be a Monday **(January AND Monday)**. This expression specifies that all data points must be present; it is exclusive.

OR expressions

OR expressions are used when you want to find an overlap between items. For example, **(January OR Monday)** specifies that the day could be in January or could be a Monday of any month. This expression specifies that any data point can be present and is inclusive.

NOT expressions

NOT expressions are used when you are interested in a very specific list by letting you eliminate items that are not relevant. For example, (January NOT Monday) specifies that the day could be in January but cannot be a Monday.

Where to start

The first step in creating Condition Expressions is to determine your objective. A good place to start is with a flowchart using Yes and No logic. Determine the fields and values and whether the condition is to meet all conditions or just one data point. Next, determine how you want to group the criteria. You then must add the conditions (from within a form) and then determine how to group them using Condition Expressions. The remaining portion of this topic describes and illustrates how to compose Condition Expressions.

Before you can build a condition expression, you must first add the conditions from within a form such as Configure Data Links Details.

1. Add Display Conditions

For forms that offer conditions, when you click **Add** (lower portion of the form), a row opens where you can assign values to within fields such as Source, Field, Operator, Value, and Label (see the following image). The values must correspond to what is stored in the database. For example, lookups would be the Code value, and for parent form fields, such as Case Type, the value would be the ID of the form.

The following example illustrates two expressions, HOL1 and HOL2. These entries are Display Conditions. When the Condition Expression field is empty, the Display Conditions are processed as ORs. For example, in the following example, there is no Condition Expression. Therefore, HOL1 and HOL2 are processed as ORs. The result would be the match for each condition; it would be all-inclusive (WHERE Holiday Name = Christmas OR Holiday Name = New Year's Day).

2. Add a condition expression

But what if you want to treat the Display Condition statements differently? What if OR is not enough? You can use a Condition Expression by referencing the display condition statements (through Labels) and adding the AND and OR operators: (Cond1 AND Cond2) OR (Cond3)**.** With a Condition Expression, you can control how many conditions you use and how they are used.

When building a Condition Expression, you use the condition Label value of the Display Conditions. You can create complex conditions by using unique combinations of the conditions. Condition Expressions can use AND as well as OR conditions.

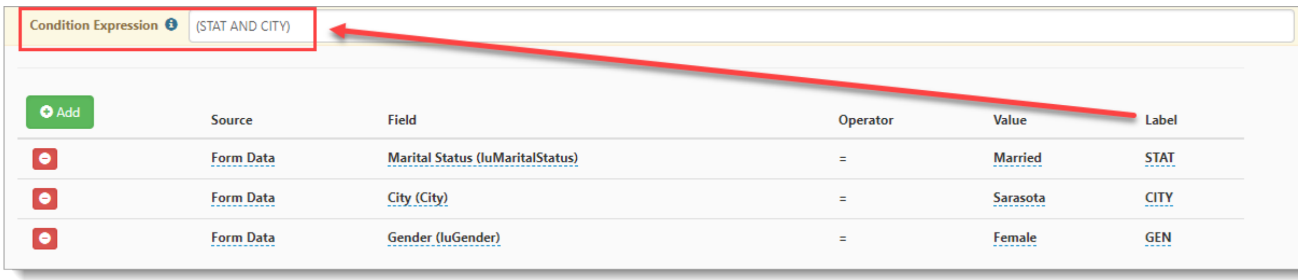
For example, to trigger a workflow when there is a new training request, the expression could be stated as **(CaseTypeTR AND CaseNEW)** where:

- CaseTypeTR: When case type = Training Request
- CaseNew: When case status = New

Using the Label field, you can combine trigger conditions into more complex expressions. For example: (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5.

The following example has three Display Conditions: STAT, CITY, GEN. Two of the three Labels are used in the Condition Expression.

- The (STAT AND CITY) Condition Expression is looking for employees who are married **and** reside in Sarasota. This result is exclusive.
- When the three separate conditions (STAT, CITY, GEN) are used **without** a Condition Expression, the search is for employees who are married, or reside in Sarasota, or are female. The result is inclusive.



Continue to the next topic, Order of operation.

Order of operation

The order of execution can significantly affect the resulting value. To control order and precedence you use parentheses to group functions. Everything within the parentheses is evaluated first to yield a single value before that value can be used by any operator outside the parentheses. If an expression has nested parentheses, the most deeply nested expression is evaluated first.

When a condition is met, the evaluation ends, using the results of the first successful condition. For (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5, if the first set (Condition1 AND Condition2) is met, then the remaining OR statements are ignored.

Note: You can only use Labels and the AND, NOT, and OR operators in your Condition Expression. The Condition Expression cannot contain SQL keywords.

Condition expression example

The following example illustrates multiple expressions for filtering attributes of a physical property (structure) and user rights:

- Is the property owner-occupied?
- Is the property located in one of the following states: Georgia, Alabama, Arizona?
- Is the property height in the number of stories greater than or equal to 5?
- Does the user have the security entity named biz_RequestTypeCategory_Envornmental?

Example

Each expression Label is brief and descriptive: OO, GA, AL, SECenv, 5PLUS, AZ.

Type	Description	Label
FieldValueExpression	gen_Property.OwnerOccupied Equals Yes	OO
FieldValueExpression	gen_Property.State Equals GA	GA
FieldValueExpression	gen_Property.State Equals AL	AL
SecurityEntity	Security Entity Equals biz_RequestTypeCategory_Environmental	SECenv
FieldValueExpression	gen_Property.NumOfStories Greater Than or Equal 5	5PLUS
FieldValueExpression	gen_Property.State2 Equals AZ	AZ

Condition expression example

The Labels are used in the Condition Expression along with the AND and OR operators. Additionally, grouping and nesting control the evaluation.

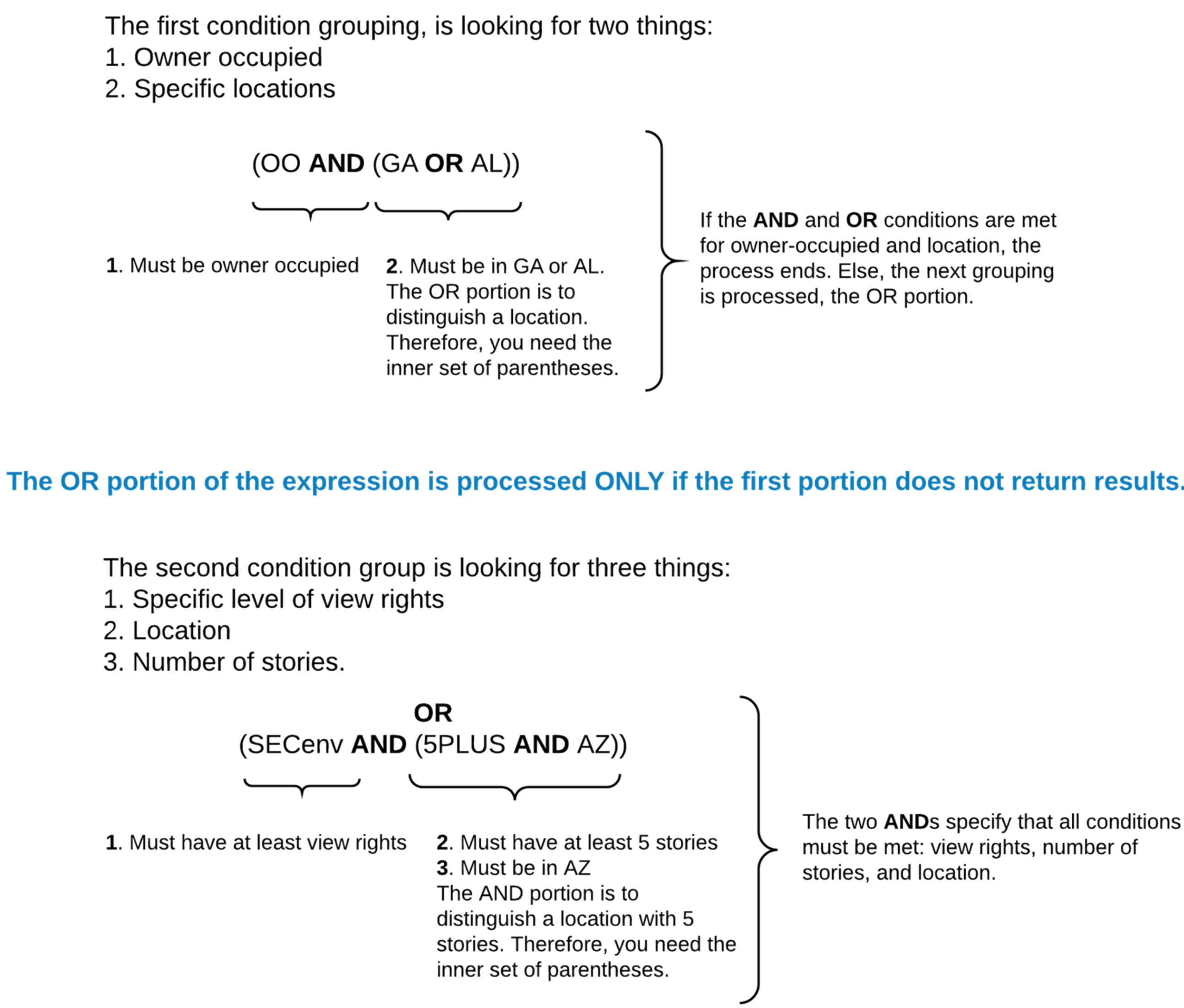
The following example has two major groupings delineated by sets of parentheses. Within each major group, there is a sub-group, also delineated by a set of parentheses.

(OO AND (GA OR AL)) OR (SECenv AND (5PLUS AND AZ))

First group - the AND	Parentheses and groupings
The first grouping has two sets of parentheses: • The first group specifies owner-occupied as OO. You need a set of parentheses for OO. Sub-groups are placed inside the parentheses of the major group.	**(OO** AND (GA OR AL)**)**
• Within the owner-occupied group, the location must be GA or AL. You need a second set of parentheses for the locations GA and AL.	(OO AND **(GA OR AL)**)
Second group - the OR	

First group - the AND	Parentheses and groupings
The second grouping has two sets of parentheses: • The first group is SECenv. You need a set of parentheses for this major group.	**(SECenv** AND (5PLUS AND AZ)**)**
• The second group is the number of stories and location. Place the sub-group within a set of parentheses.	(SECenv AND **(5PLUS AND AZ)**)

The following diagram explains how the sample condition expression is evaluated.



Result

For the expression **(OO AND (GA OR AL)) OR (SECenv AND (5PLUS AND AZ))**

- If the property is owner-occupied and is located in Georgia or Alabama, then the evaluation ends because the condition has been met. The OR portion is ignored.
- However, if there are no properties that are owner-occupied in either Georgia or Alabama, then the OR expression is evaluated. The OR portion looks for:
  - user view rights to RequestTypeCategory_Environmental
  - **and** the property must be in Arizona with a minimum height of 5 stories

Summary

The examples provided in this topic use nested groupings along with the AND and OR operators. Keep in mind that your needs may vary. Additionally, plan ahead. Determine your Display Conditions and use brief Labels. After you have defined your Display Conditions, then you are ready to compose the Condition Expression.

Learning how: Configuring Workflow Channels

Note: Some parts of this video may not represent the most recent changes to the ClientSpace user interface.

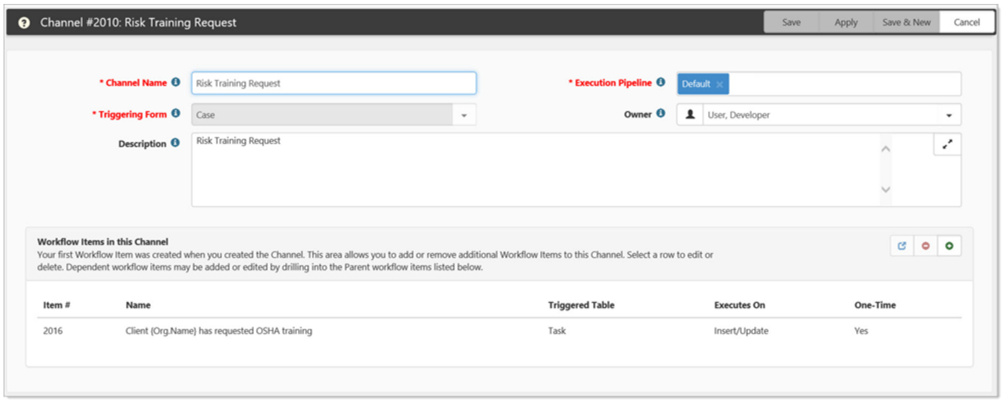
View the video Configuring Workflow Channels.

Learning how: Advanced Workflow Configuration

View the video Advanced Workflow Configuration.

Channel and items

When you have completed the four-step process, you are returned to the Channel. Channel is the top-level item that can have multiple workflow items, all potentially triggered from unique conditions. In our example, a Risk case in the Southeast region could generate a different workflow than the same case in the Northwest region and so on. All these top-level Workflow items are attached to the Workflow Channel.



Workflow Channels can contain many workflow items, and each item can have dependent workflow items. You can add, edit, and remove workflow items from the channel using this interface.

From the Workflow Channels list, you can:

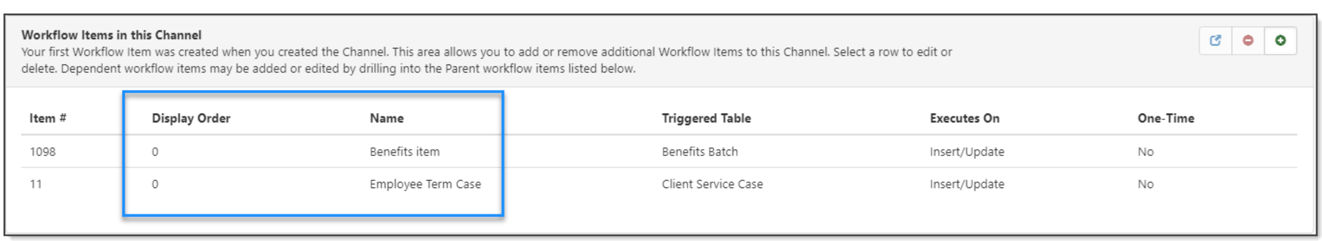
- **Edit**: Select an existing workflow item and click (**Jump**) to begin editing an existing workflow.
- **Delete**: Delete the selected Workflow Item and any dependent items.
- **Add**: Add a new Workflow Item for this channel.

Display order of workflow items

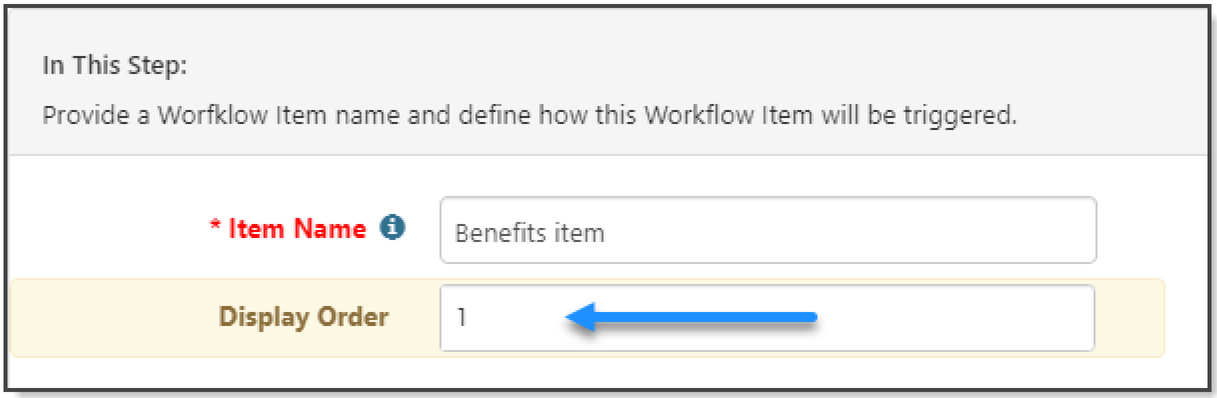
You can adjust the display order of workflow items, so they present in a logical order. Changing the display order does not affect the triggering of workflow items but is merely a visual reference to better allow administrators to organize these lists. Workflow items are adjusted by numerical value. You can use negative numbers to move an entry above an item numbered 0 (zero).

To alter the display order of workflow items:

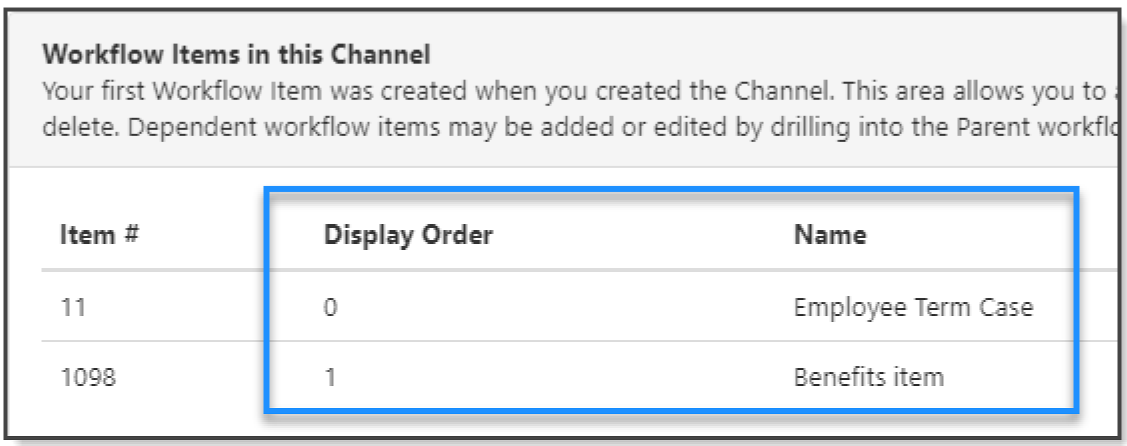
1. Open a workflow channel with multiple workflow items.
   The Channel opens, with the Workflow Items listed. Note the column Display Order. In the following example, both workflow items have a display order of 0 (zero).



2. To change the display order, select and open (double-click the item or) the item you want to move. Let's move **Benefits item**.
   The item opens in the workflow wizard.
3. In **Display Order**, type the new order number and click **Save**. For this example, let's change the order for **Benefits item** from 0 to 1.



You are returned to the Channel list of Workflow Items. Note the Display Order column now shows **Benefits item** as the second entry with the Display Order number set to 1.



Publishing and unpublishing workflows

When you return to the Workflow Channel search list, you can publish and unpublish items. The Workflow Channels list displays published Workflow Channels by default when opened initially.

Additionally, you can publish and unpublish sections of a workflow within a channel. You can publish and unpublish Workflow Channel items individually so that you can set up complex workflows without keeping the entire channel in the same published/unpublished state. Changing the publish/unpublish state for a workflow item does not affect any dependent workflow items. The dependent workflow items remain in their respective state. If the parent item of a child is unpublished, a warning message is issued.

To view unpublished Workflow Channels:

1. In **More** search, click **Unpublished**.
2. Alternatively, you can toggle the **Status** chiclet to **Unpublished**.
3. This action also displays the More search dialog. In the dialog, the Status options are All, Published, and Unpublished. When you change the status in More, the Status chiclet also changes.

To view published and unpublished Workflow Channels:

1. When viewing the Workflow Channels list, you can view both published and unpublished from **More** search > **All**.
2. Alternatively, while viewing the Workflow Channels list, you can also remove the Status chiclet by clicking the **X**.
3. This action displays both published and unpublished workflow channels.

To unpublish a Workflow Channel:

- From the Workflow Channels list, while viewing published items, select the **Published** option. The entry is now unpublished.

To publish a Workflow Channel:

- From the Workflow Channels list, while viewing unpublished items, select the **Published** option. The entry is now published.

Viewing and publishing Workflow Channels

Workflow channels can be viewed and published by global administrators.

To view Workflow Channels:

1. Go to **System Admin** ⚙ > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. From the list you can do the following:

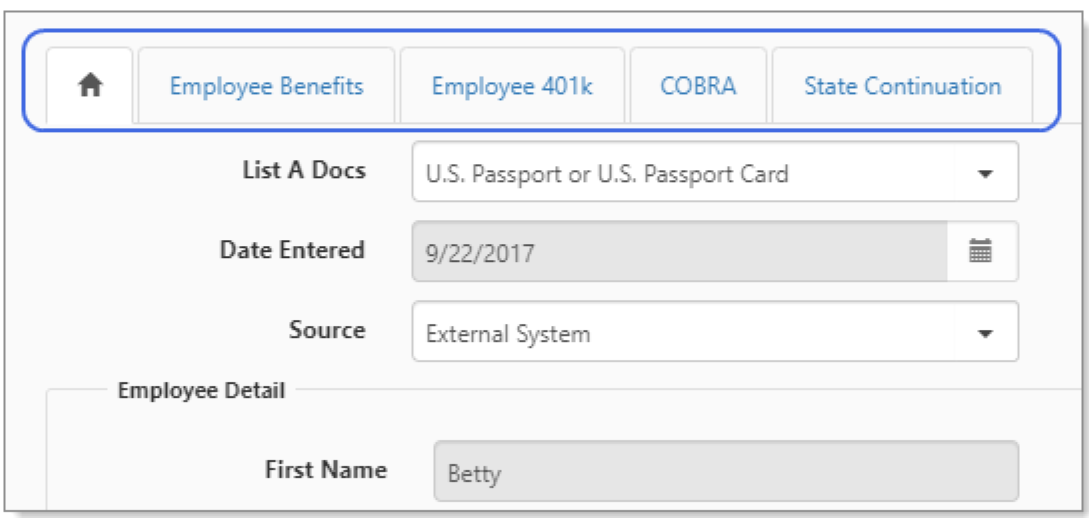
Action	Description
Add	• To add a workflow channel, click **Add**.

Action	Description
Delete	• To delete the selected workflow channel, click **Delete**.
Details	• To view details about a workflow channel, click **Details**.
Visualize	• To view the item number and name, click **Visualize**. • To open an item in the workflow channel configuration, click an item.
Download as CSV file	You can download the workflow as a CSV file: • The file name is *Workflow Channel <number>-<workflow channel name>.csv*. For example, **Workflow Channel 36-Scheduled Test.csv**. • The contents resemble the layout, where indentations represent children workflow items. • The workflow items and their children names are formatted as #<number>:<name>. You can do the following: • Edit the data. • Report on the data with a graph or table. **To download the workflow as a CSV file:** 1. From the list, select a channel (highlight the entry). 2. Click **Visualize**. The Workflow Channel visualize dialog opens. 3. Click (Download as CSV file). • For Chrome, when the download finishes, you see it at the bottom of your browser. • For Internet Explorer, to view downloads, select **Tools** > **View downloads**.
Publish and Unpublish	When selected, the Published column indicates the workflow channel is published. • To unpublish the workflow channel, clear the **Published** option. • To publish an unpublished workflow channel, select the **Published** option.
View Published and	By default, the **Status** chiclet is set to **Published**.

Action	Description
Unpublished Workflow Channels	**To toggle the Status:** 1. Click the **Status** chiclet **Published**. The More dialog box opens. 2. Select a **Status**: All, Published, Unpublished. 3. Click **Search**. The list displays according to your selection. • Unpublished workflow channels display in italics and bold. • Published entries display as normal with the Published column selected. 4. You can also click the **X** beside **Status Published**. This action displays all workflow channels: published and unpublished. 5. To reset the view to Published, click **Reset**.
Visualize	• To view the item number and name, click **Visualize**. • To open an item in the workflow channel configuration, click an item.

Workflow Channels and tabbed dataforms

Tabbed dataforms comprise a parent (home form) and child forms, which are extensions of the parent. The following image is an example of the Employee dataform with four tabs: Employee Benefits, Employee 401k, COBRA, and State Continuation. This is a tabbed set of dataforms.



When configuring Workflow Channels, you can reference data from a tabbed dataform set on the:

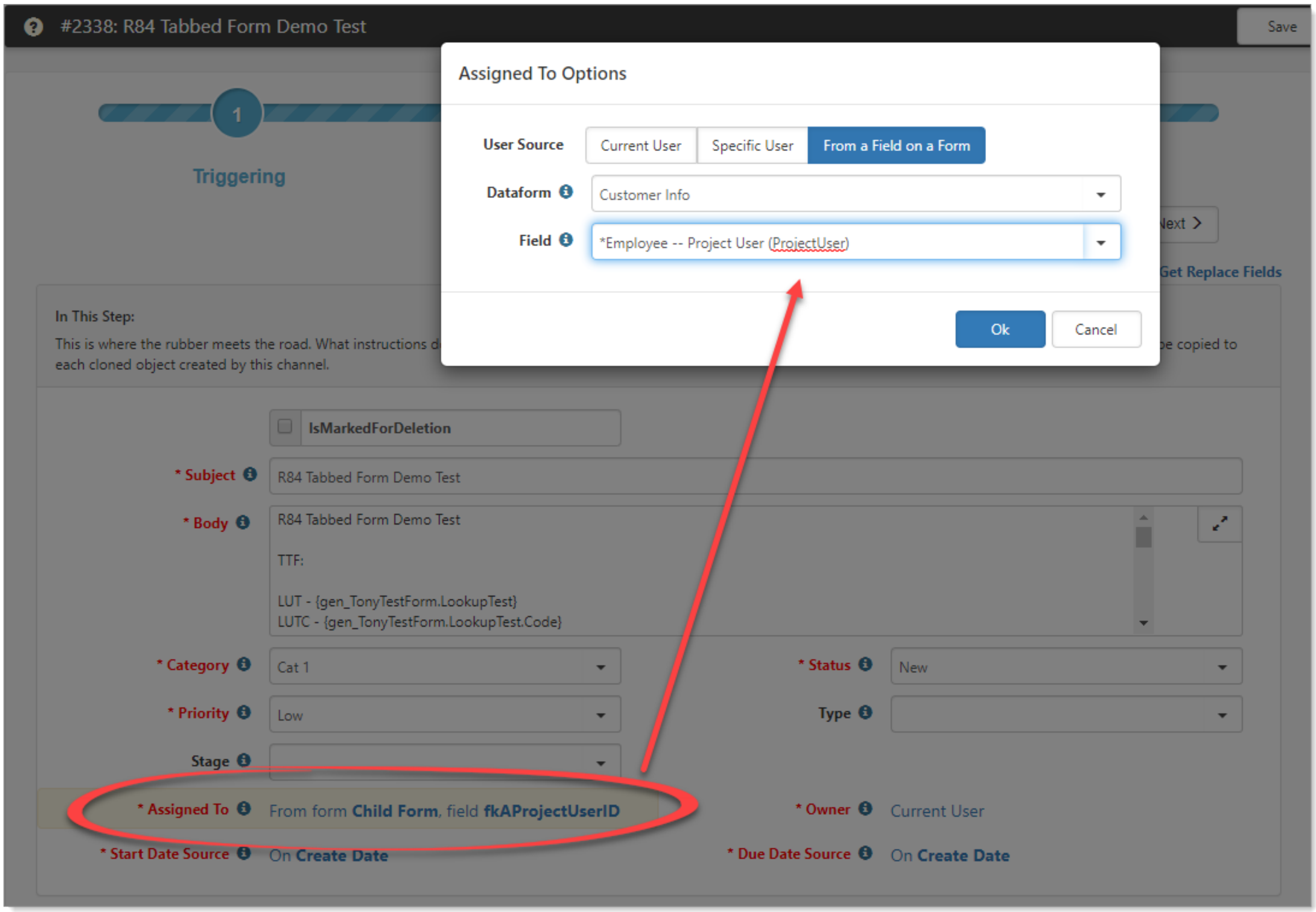
- Content step
- Conditions step
- Notifications step

On the Content and Notifications steps

On the Content and Notifications steps, you can set user fields to values that exist on dataforms across a tabbed set. Let's say that you have a parent dataform, and it has a few child dataforms — we call this a tabbed relationship. You want to be able to reference user fields on both dataform types. (Note, we can also have a parent-child relationship that is not tabbed.)

- In the Content step, when you select **Assigned To**, the Assigned to Options dialog box offers the User Source as Current User, Specific User, and From a Field on a Form.
- In the Notifications step, when you select **None**, the Options dialog box offers User Source as None, Specific User, and From a Field on a Form.
- For both steps, when you select **From a Field on a Form**, you have additional choices — from which Dataform and then when you select a dataform, which Field. The items in the Field list are driven by the Dataform you select.

The user type fields on workflow item tasks and dataforms include any child forms in a tabbed relationship with the available selected dataform when the user source option of **From a Field on a Form** is selected. The child form name has an asterisk, as in the following example: `*Employee -- Project User (ProjectUser)`.



These tabbed form fields appear in the **Field** list below the primary form field in the tab relationship and are formatted as follows:

`*<ChildFormName> — <UserFieldName>`

Example: A form named Form Parent is in a tabbed relationship with Form Two and Form Three. Form Two and Form Three are child forms to Form Parent. Each form has user fields.

Let's say you have the following scenario in the Assigned To Options dialog:

- In **Dataform**, Form Parent is selected.
- In **Field**, the fields for Form Parent are listed at the top of the **Field** selector, and fields from the child forms are available below the primary form in the following format:

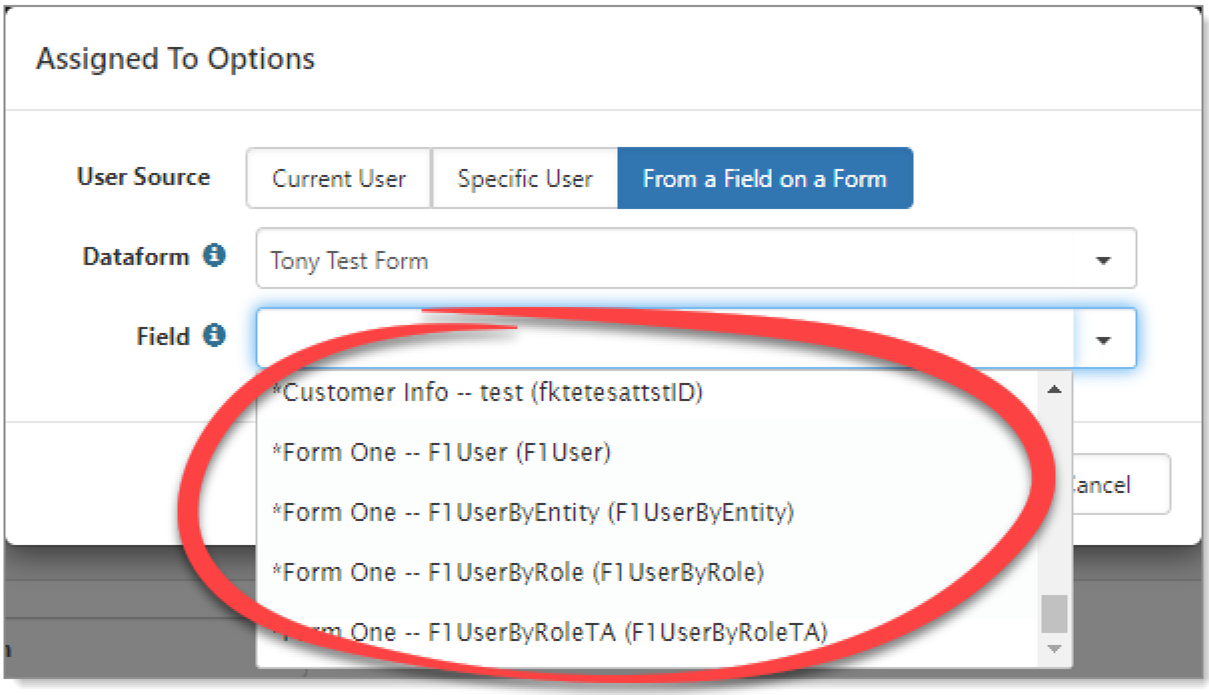
  *Form Two -- User By Role (fkUserByRoleID)

  *Form Two -- Specialist User (fkSpecialistUserID)

  *Form Three -- Other User (fkOtherUserID)

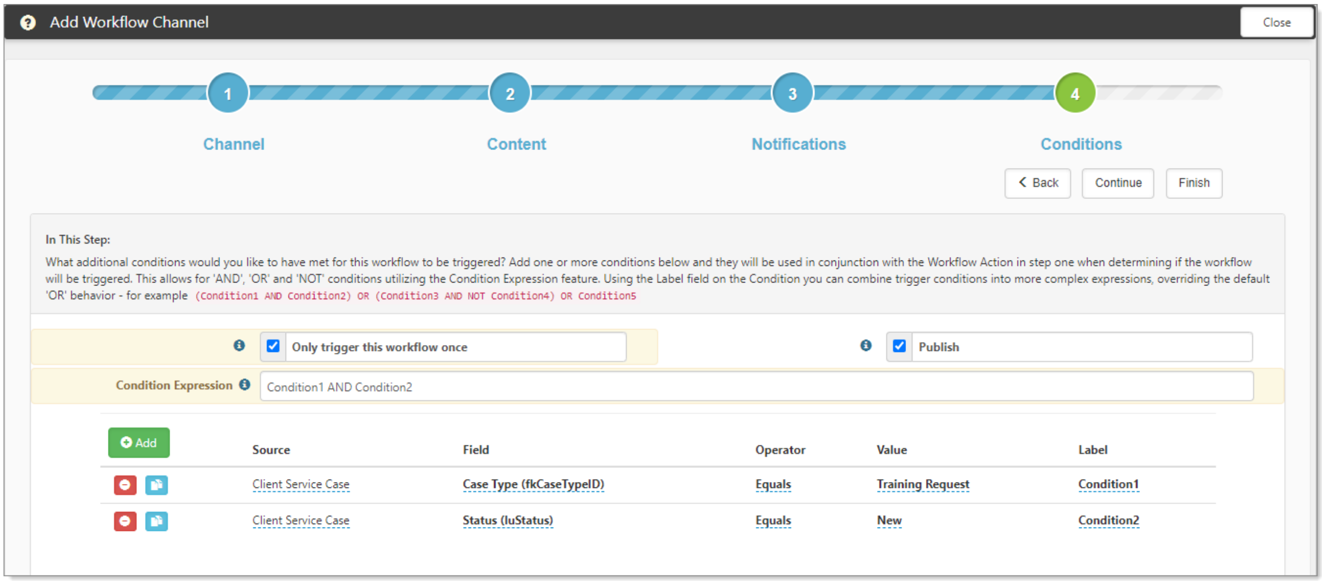
Keep in mind, all these fields are user fields. You can select any user field from a child dataform. You can also select a user field from the parent form and any single dataforms.

Example: The following example shows a parent form named **Tony Test Form** in the **Dataform** list. Tony Test Form is a parent form to Form One. When Tony Test Form is selected, the **Field** field displays all user-related fields from the parent form and child form. For **Fields**, you can select a field from the parent form (in this case Tony Test Form) or you can select fields from any child dataforms. Child forms are denoted with an asterisk (*), as shown in the following example.



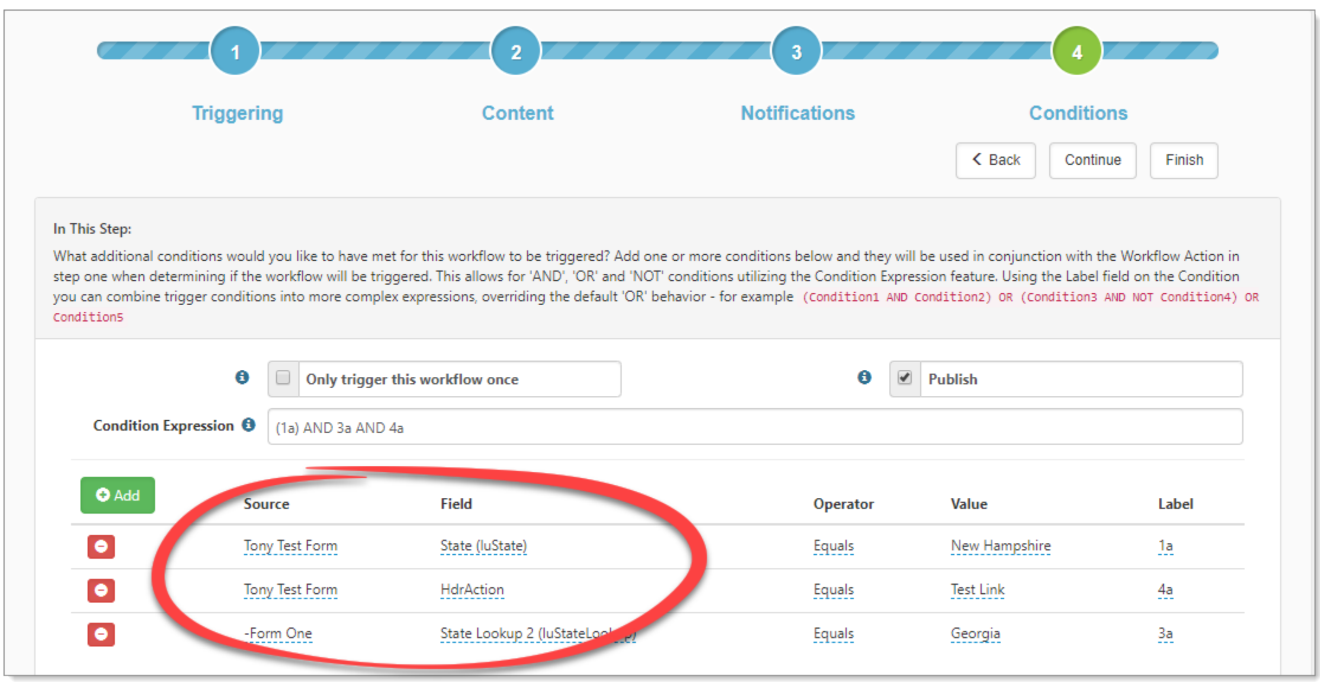
On the Conditions Step

Workflow Channels include all active tabbed forms on the Conditions step of a workflow item when the triggering form is the home form of a tabbed set.

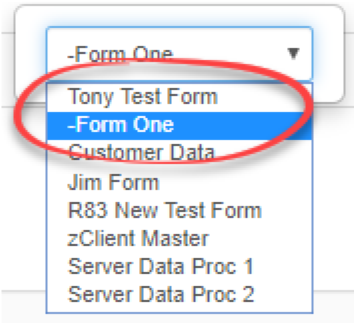


Source and Field lists

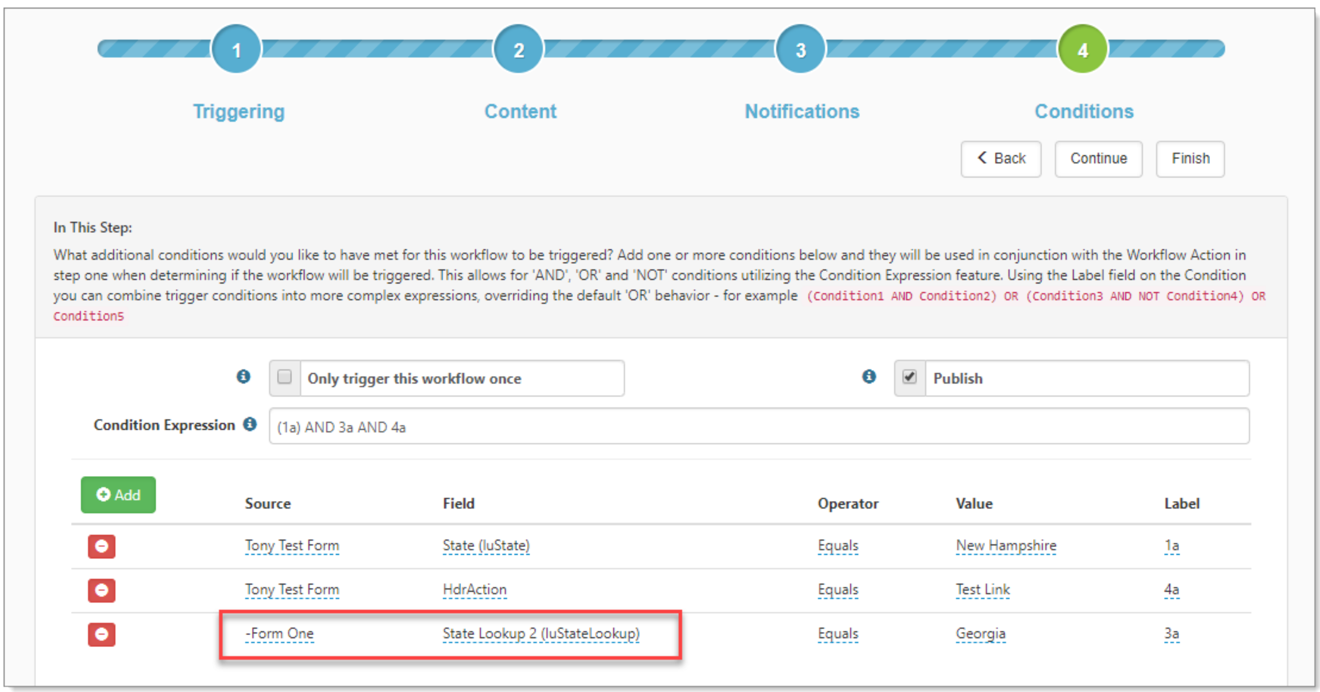
The **Source** list includes all active tabbed forms included in the tabbed set when the triggering form is the home form of a tabbed set. In the Source list, the primary tabbed dataform precedes the child tabbed forms. The child dataform names are prepended with a dash (–). The **Field** list is filtered based on the selected Source.



This example shows that for the Source column, Tony Test Form is the parent, and Form One is the child.



The following example shows the Source column with a child dataform selected (-Form One) and in the Field column, a field named State Lookup 2 is selected.



Conditions

Condition Expressions operators (AND, OR, and NOT) work across multiple dataforms. You can configure conditions for task workflow channel items from the most recent parent dataform if your tasks are multiple levels deep. This enables you to refer back to the child dataform logically. (For example, a milestone triggers a Case, and the Case triggers multiple layers of Tasks, all Tasks can reference the Case).

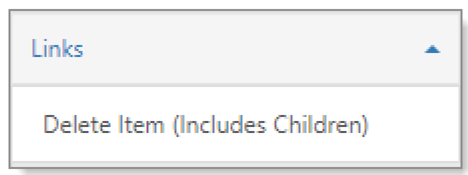
- Source includes the most recently referenced dataform that would trigger the initial task (single or multi).

- Condition Expressions operators (AND, OR, and NOT) work across multiple dataforms.
- IsDirty does not appear in the trigger operator list because the task can be separated from the dataform by several other tasks; the dataform may not be dirty. IsDirty is only available for the triggering form. Child forms or other single dataforms in the workspace should never be dirty unless the change is occurring there.
- The Add Untriggered functionality is available when adding fields from this source.
- If the most recent dataform is the main triggering dataform for the workflow, the condition Source is **Channel Trigger: <NameOfTriggeringForm>**.
- If the most recent dataform is a cloned dataform workflow item, the condition Source is **Workflow #<ItemNumber>: <ItemName>**.

> For tabbed form fields that are used in triggering workflows, you cannot delete or inactivate any of the fields. The system indicates where the field is used: *Channel: <Workflow Channel Name>, Item: <Workflow Channel Item Name>* (with a clickable link to the affected Workflow Channel configuration). Delete is enabled when all dependencies are cleared.

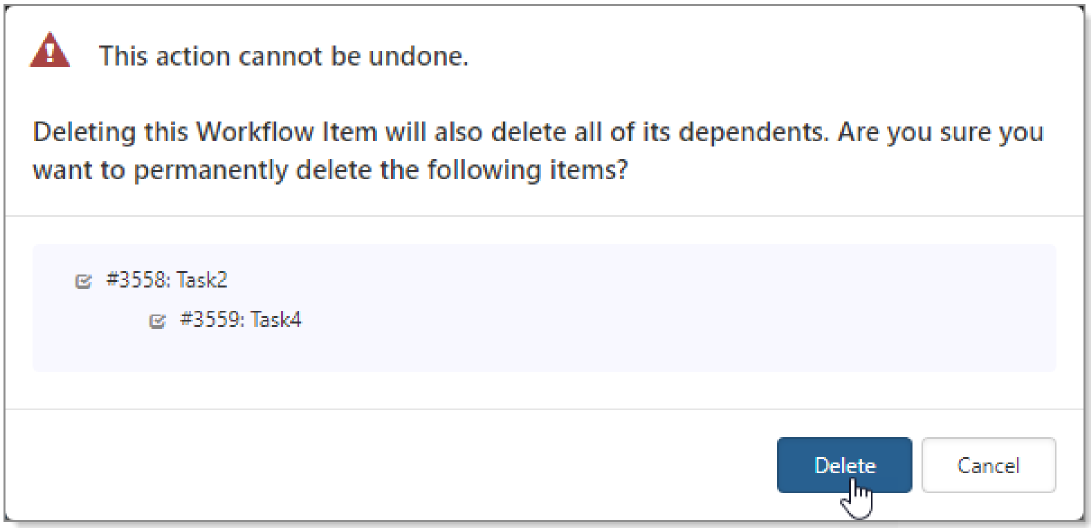
Workflow Channel Action Items

Workflow Channel action items appear in the Action Center pane. This topic reviews Links, Dependent Workflow, and Attachments.



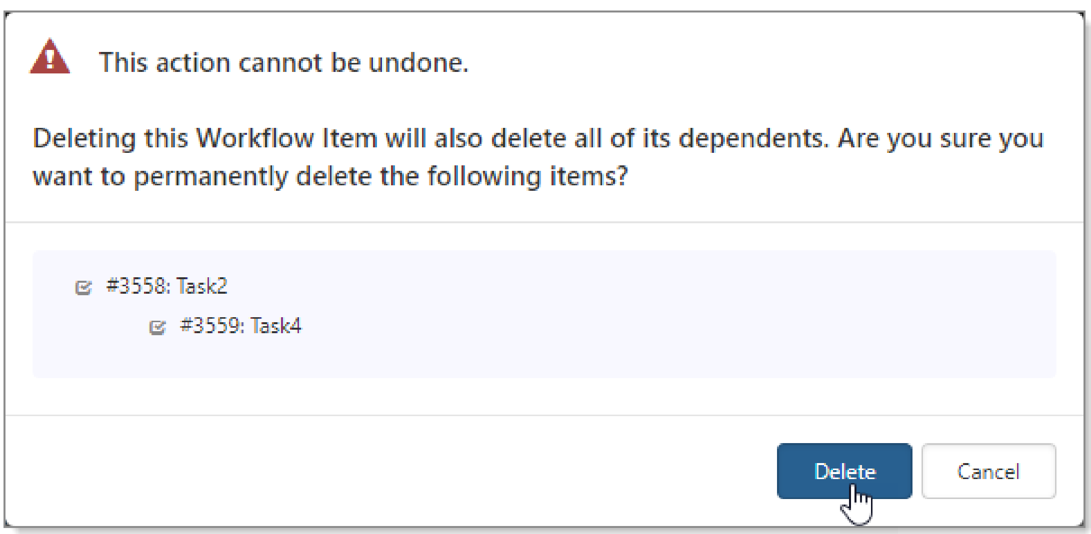
Links: Delete Item

Deleting workflow items and any dependent items



1. To delete a workflow item and any dependent items, click **Delete**.
   A message displays in the form of a simplified flowchart showing the dependents. When you delete the workflow item, the dependents are also deleted.
2. Click **Delete** or **Cancel**.

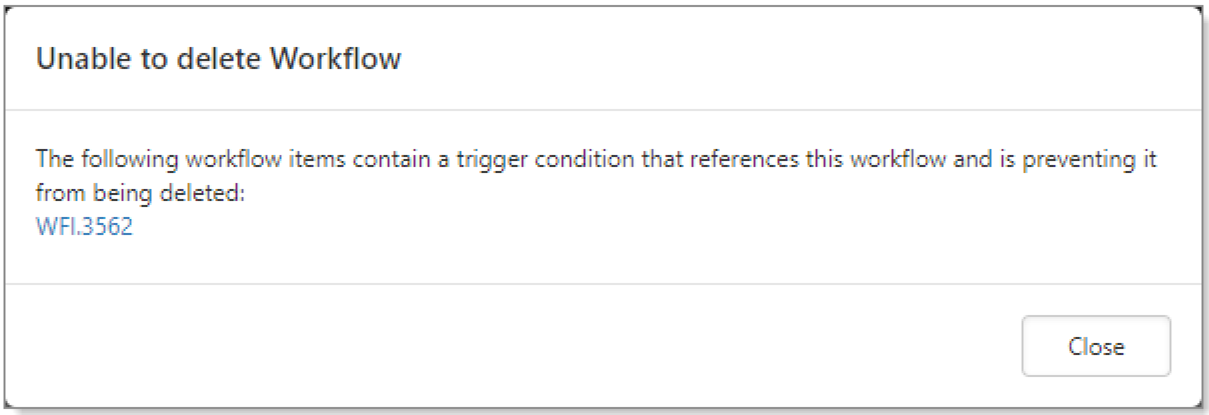
Workflow items with dependent conditions



You cannot delete a workflow item dependent on a condition in a different workflow item, in the same tree, but not a descendant. If you attempt this, an error displays with a link to the dependent items.

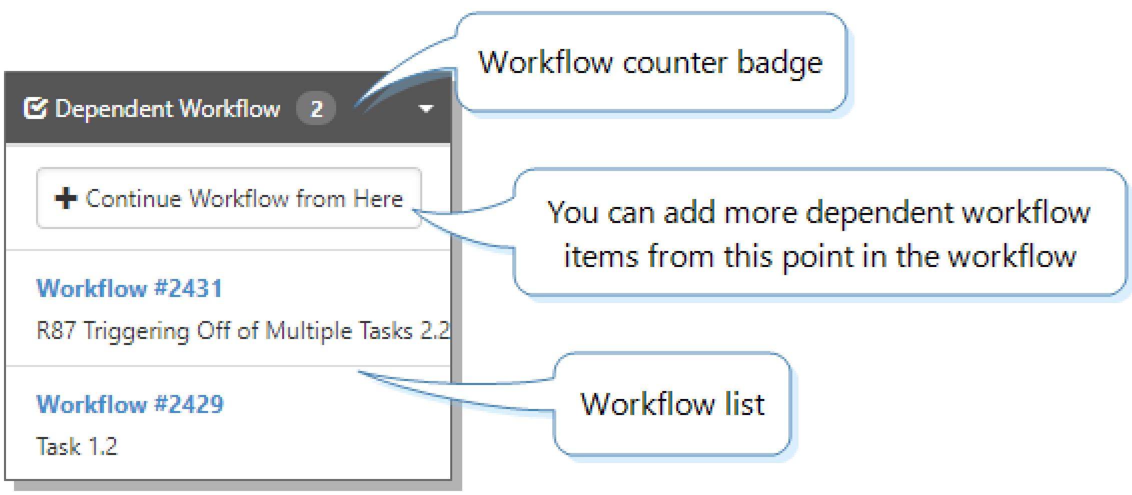
The first message is in the form of a simplified flowchart showing the dependents: "This action cannot be undone."

When you click **Delete**, another message displays "Unable to delete Workflow" with the workflow items that contain a trigger condition that references this workflow. These dependent items prevent deletion. You can link directly to the workflow items preventing deletion.



Dependent Workflow

The

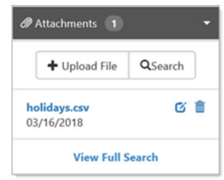


Depende
nt Workflow Action Item allows you to trigger additional steps based on the original workflow item that was triggered. You can trigger multiple items simultaneously from the same triggering condition as dependent workflows. These items can then trigger additional workflow items, allowing for a cascading workflow. Triggering a dataform workflow always ends the cascade.

The Dependent Workflow Action Item includes:

- **Workflow counter badge**: Displays a count of the dependent workflow items immediately following this item.
- **Continue Workflow from Here**: Allows you to add more dependent workflow items from this point in the workflow.
- **Workflow list**: Displays the individual workflow items that are dependent at this point.

Workflow Attachments



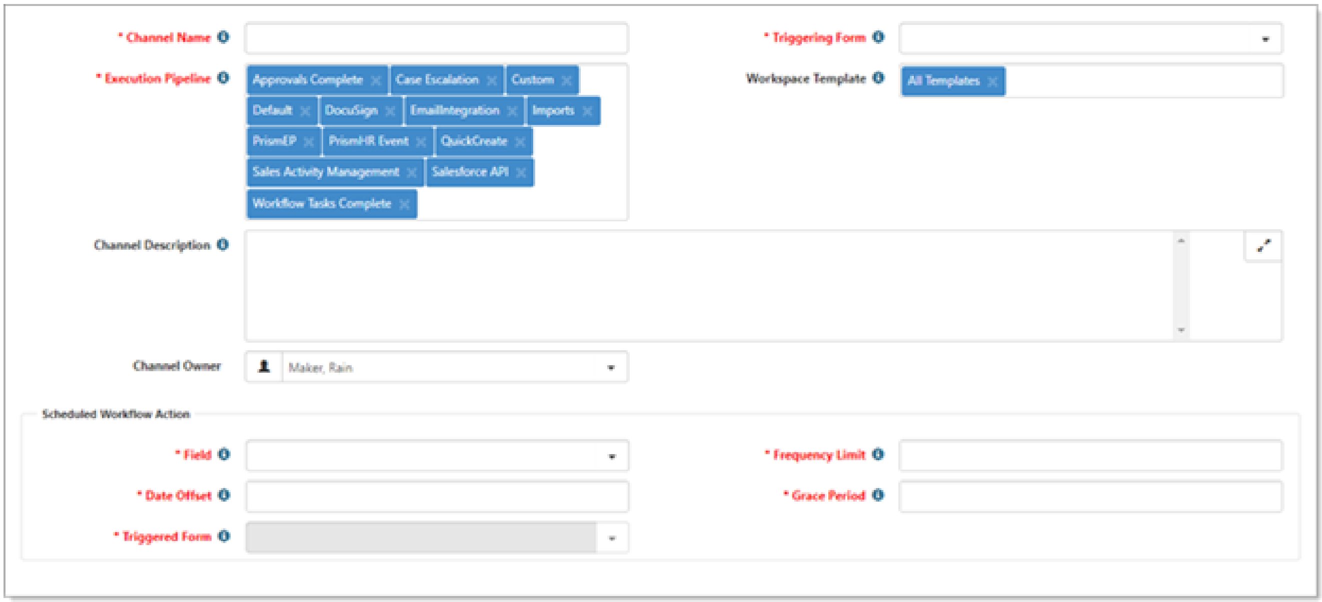
Workflow Attachments stores attachments created when a workflow item generates a task or dataform. These attachments are specific to the workflow that created the record. When that workflow item is automatically generated, it contains a link back to the original file linked to the workflow during configuration. This process does not clone the file; it merely provides a link to the original object. Workflow Attachments are useful for workflows designed around standardized processes such as employee onboarding, where you need to use the same document every time.

Configuring scheduled workflows

Business processes can sometimes be triggered upon reaching a specific date, such as a task that needs to be completed two weeks prior to a client's first payroll date. Workflow channels allow you to configure these types of automatic business processes using scheduled workflows. This topic provides a high-level overview of scheduled workflows as well as step-by-step instructions that can help you to begin using this robust feature to schedule the creation of workflow generated tasks and cloned dataforms.

To configure scheduled workflows:

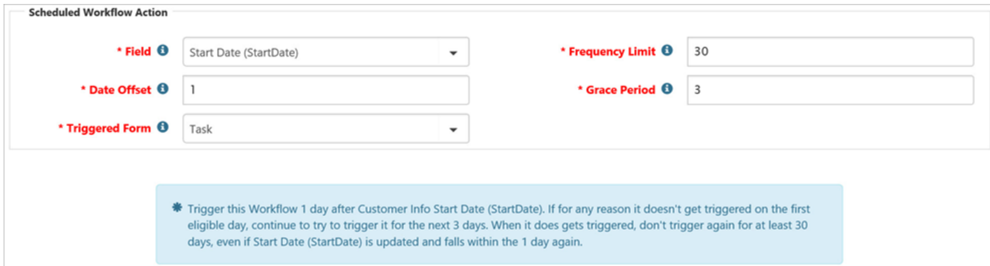
1. Go to **System Admin** > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. Click **Add**.
   The Choose Workflow Triggering Type dialog opens with options to select **Real Time** or **Scheduled**.
3. When you select **Scheduled**, the Add Workflow Channel wizard opens with Step 1 Channel. In this step, you need to configure the date that triggers the scheduled Workflow Action.



4. Configure the following options:

Channel Name	Provide a descriptive name of the workflow process.
Triggering Form	Select the form to trigger the workflow.
Field	Presents a list of available Date fields from the Triggering Form selected.
Frequency Limit	The Workflow task or dataform is triggered once every X days based on the value of this field.
Date Offset	The number of days (before or after the date stored in the triggering field) this workflow item triggers.
Grace Period	The number of days, starting with the offset date that the workflow attempts to trigger. When this grace period has ended, the workflow does not trigger again until the frequency limit has passed, and the triggering conditions are again met.
Triggered Form	The task or dataform to be generated when the triggering conditions are met.

5. After you have configured the Scheduled Workflow Action, you receive a brief synopsis of the Schedule.



6. When the last field is completed, the wizard progresses to Step 2 Content.
7. After your configured workflow is saved, these conditions are evaluated by a scheduled process (**Generate Scheduled Workflows**) to determine if the date field combined with the other workflow schedule options as well as any additional Conditions added in Step 4 (Conditions) are met.

Note: Because these workflow triggers are scheduled, the real time field analysis to determine if a field has changed (IsDirty) cannot happen. Because of this, notice that the IsDirty qualifier is not available when adding additional triggering conditions to scheduled tasks.

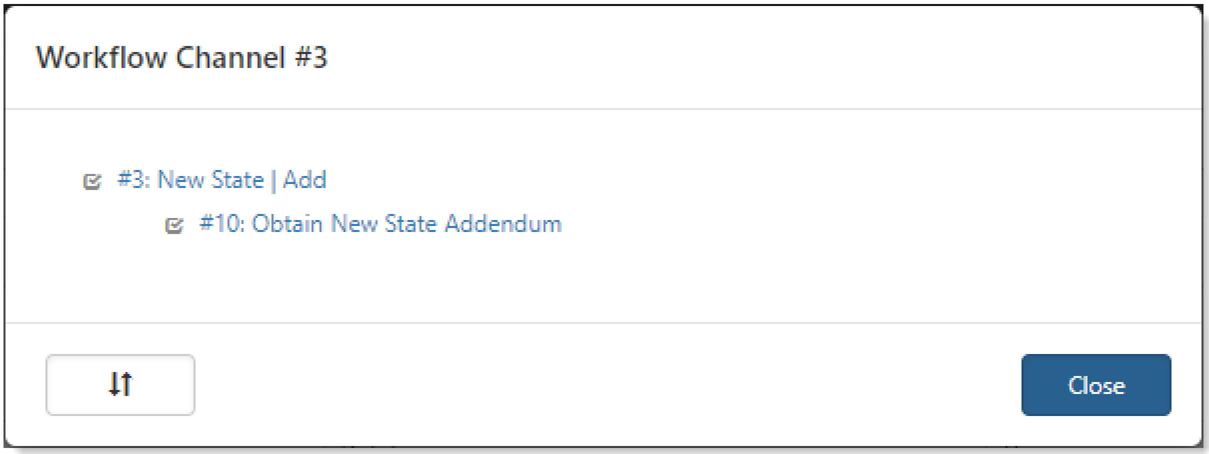
If all the triggering conditions are met, the dataform or task is generated from the Workflow. These actions can then trigger other dependent workflow items (such as a second task spawned when the scheduled task is complete) or completely new workflow channels. In this way, scheduled workflows can drive your business processes based on milestone triggering dates stored in your system.

Visualizing your workflow

You can use the Visualize function to see a graphical representation of your workflows. Workflow channel configuration provides the ability to move dependent workflow items through a simple drag and drop interface. The intelligent drag functionality is aware of the parent item type for the child workflow object that you are attempting to move and only allows this item to be moved to a workflow parent of the same type – because of this, triggering conditions of the parent always match that of the child that is being moved. Workflow items are displayed with an item number and item name: `#<Item Number>: <Item Name>`

To visualize your workflow:

1. Go to **System Admin** > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. Select an entry and click **Visualize**.
   The visualize window opens showing the parent and any child items graphically. Additionally, you can see the item number and name.



3. Click **Close**.

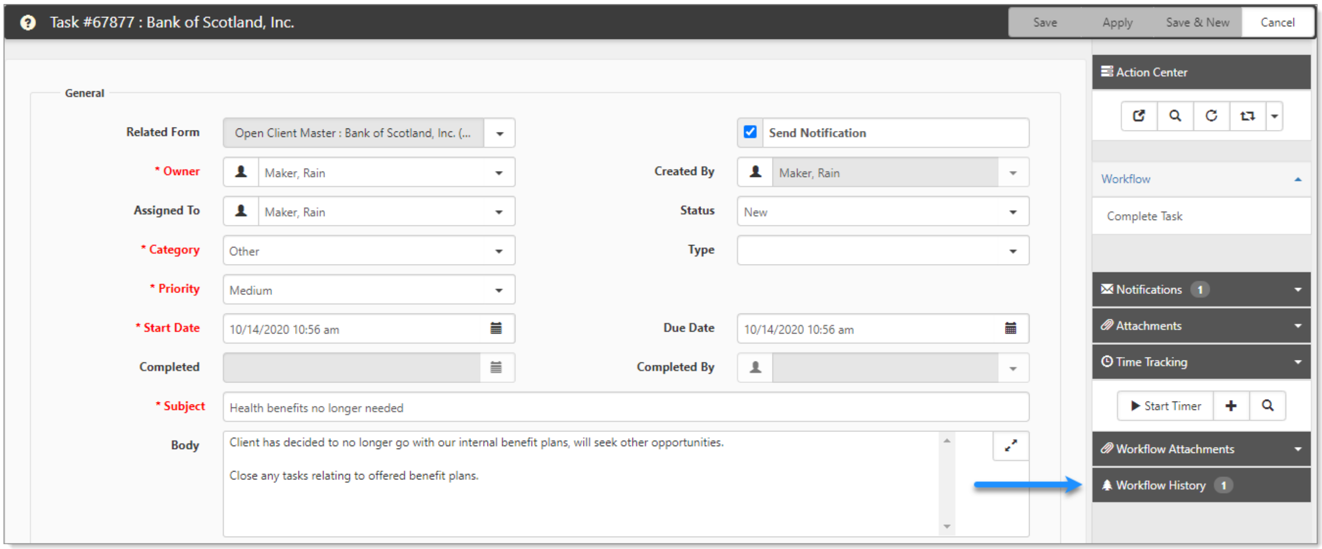
Workflow History

Workflow history is available for dataforms and tasks created from a workflow. It provides the history of how the dataform or task was created and shows the workflow item that generated the event. History is available from the Workflow History link on the Action Center. The link only shows if the item is triggered by a workflow and is only available to Global Admins and Developer users.

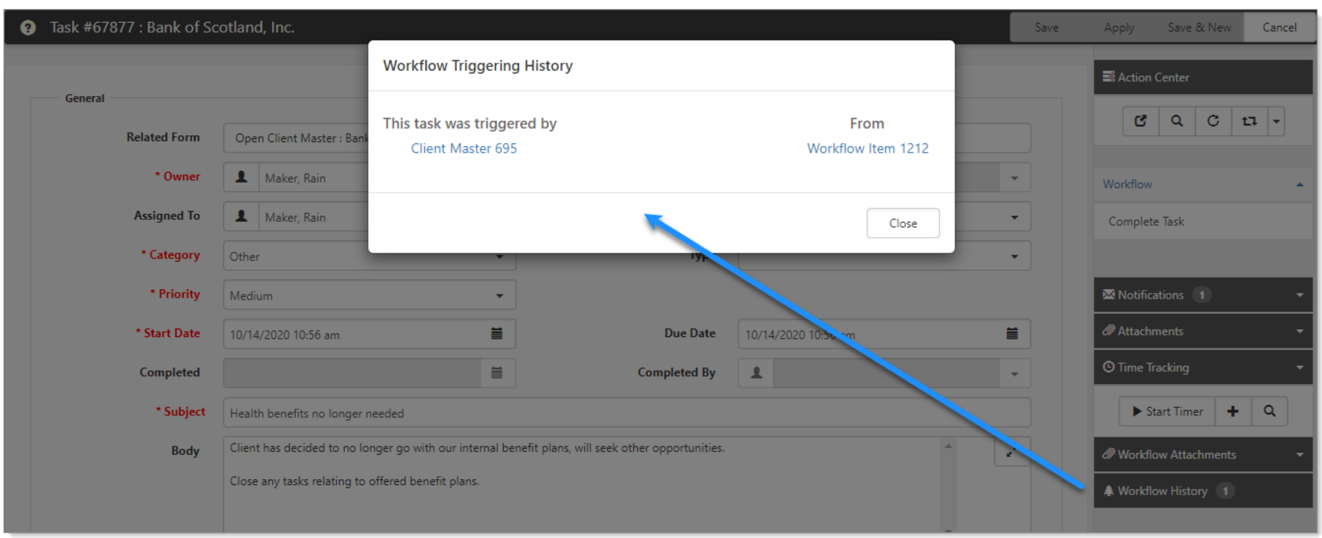
The triggering history shows the most recent event for the current task or dataform and cascades to the first triggering event.

To view workflow history:

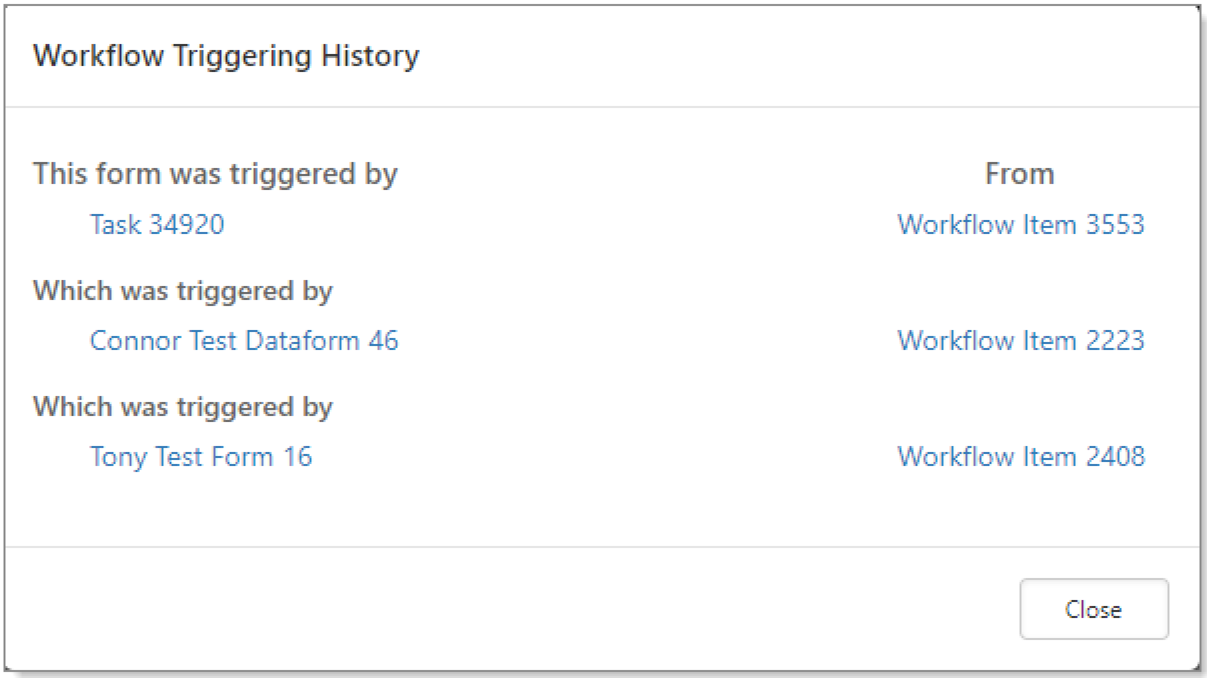
1. Open a dataform or a task.
   Our example shows an open task. Note the Workflow History bar in the Action Center with a badge counter showing the number of events.



2. In the **Action Center**, click **Workflow History**.
   The Workflow Triggering History opens. The Workflow Triggering History shows that the task was triggered by Client Master 695 from Workflow Item 1212. This example shows one entry because that is the extent of the triggering events.



The triggering history displays as many events as having occurred to this point. The following example shows multiple events, with the last one as the first event that was triggered.



To view the dataform, task, or workflow item:

1. Select the **This task was triggered by** link to open the triggering form.
2. Select the **From** link to go to that item in the workflow configuration.
3. Click **Close**.

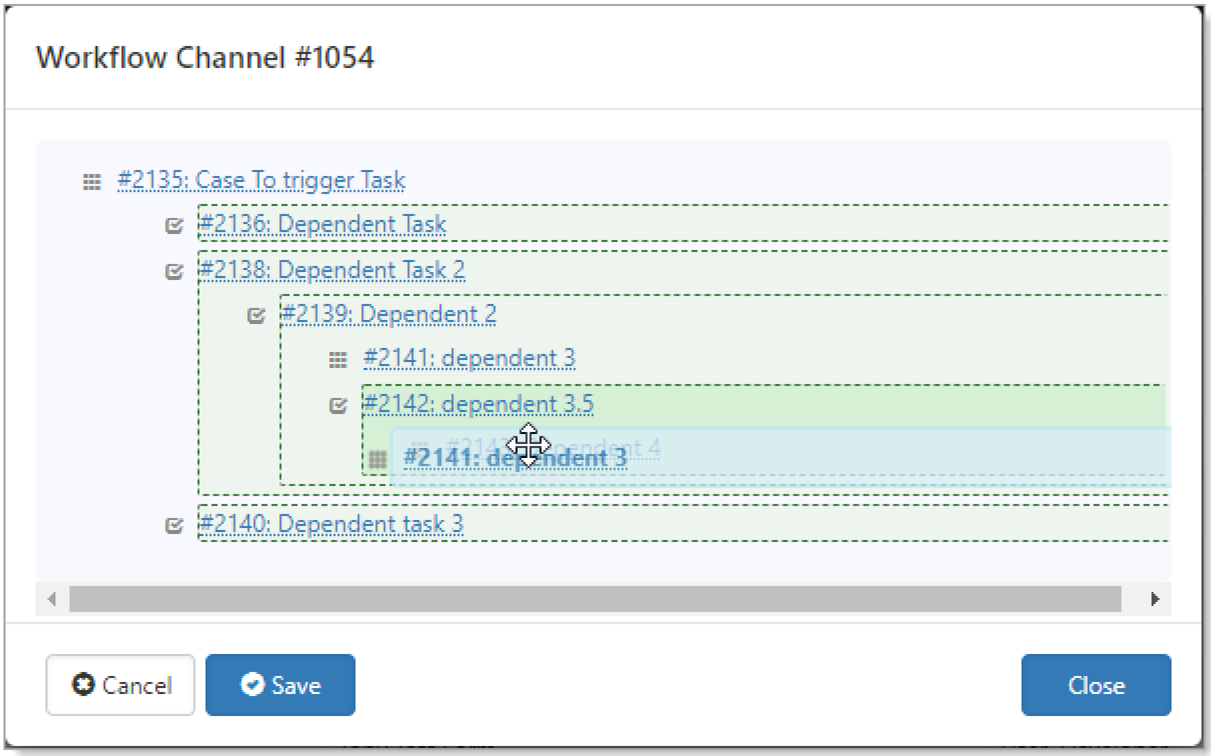
Moving or inserting tasks at another level

With the Visualizer, you can move or insert tasks to different levels. Workflow items are displayed with an item number and item name: #<Item Number>: <Item Name>.

To move or insert a task at another level:

1. From the **Workflow Channels list**, select an entry.
2. Click **Visualize**.
   The visualize window opens showing the items graphically, with parent and any child items.
3. Click ⇅ (**Move Workflow Items**).
   The function activates, showing a shaded background.
4. Hover on an entry to view the description.

5. When ready, click an entry and drag to a new location. The new location turns a darker shade within the block to which you are moving the entry.



6. When ready, click **Save**.

Triggering a workflow item from other task items

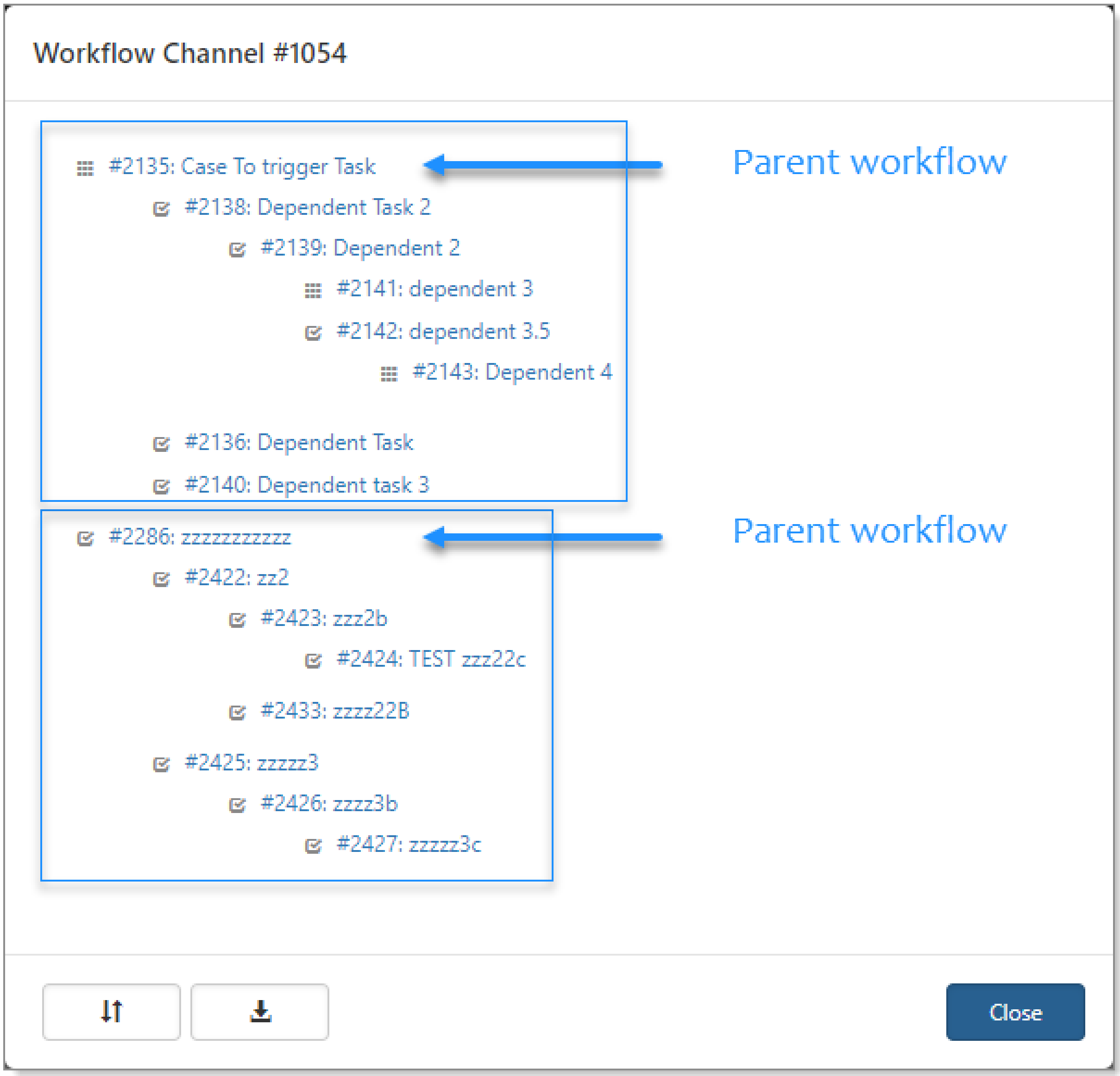
System administrators can configure a workflow item that can trigger from the Status of other Task workflow items in the same item channel.

Workflow configuration includes triggering based on the Status of Task workflow items other than the triggered item's immediate parent. To take advantage of this functionality, administrators must change the immediate parent item to fire the workflow item trigger, allowing the admin to build complex workflow triggers based on multiple workflow tasks.

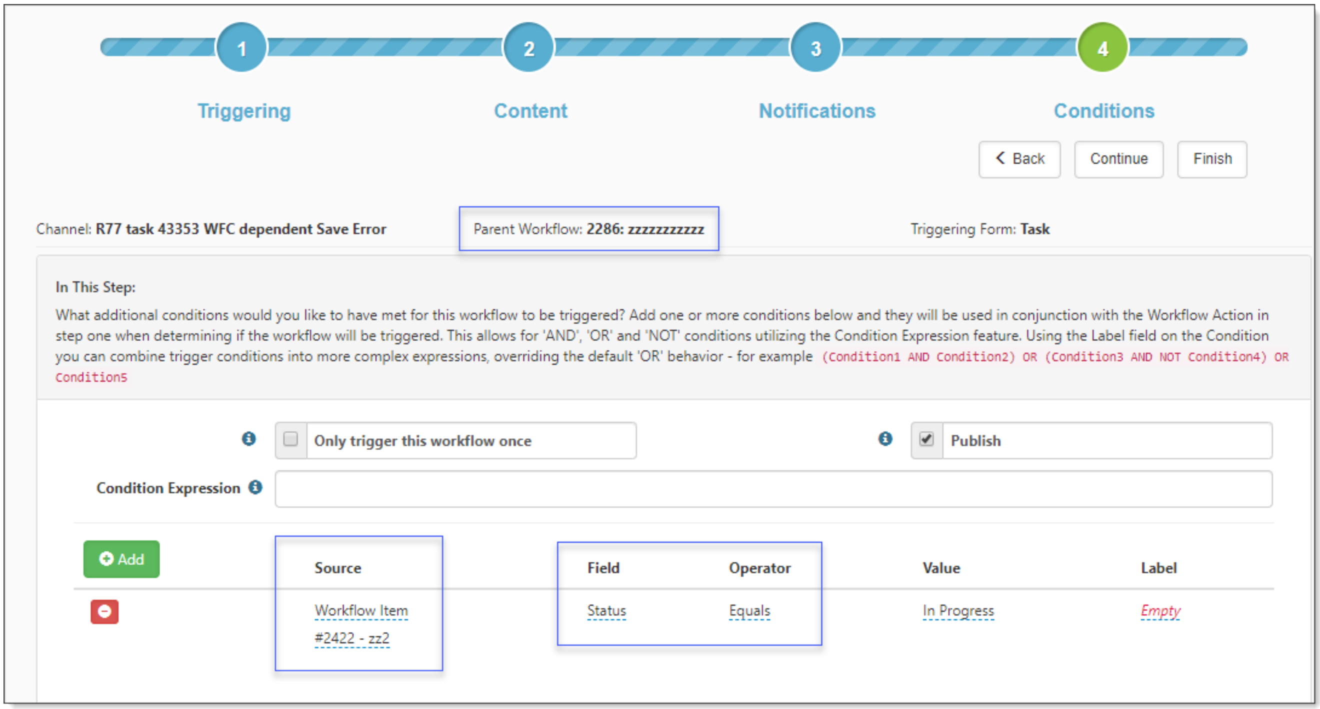
Using workflow conditions, you can specify additional task triggering conditions not related to the immediately preceding workflow task. Admins can use the Status from any task in the related workflow chain as an additional triggering condition by selecting the option for Workflow Item from the Source list and then selecting the related workflow task when prompted to select a workflow item. The only field available for triggering configuration, in this case, is Status, and the only operator that can be selected is Equals.

The following example shows two parallel workflows: #2135 and #2286. Each of the workflows is a parent workflow.

- Workflow #2135 triggers three dependent tasks: #2138, #2136, and #2140.
- Workflow #2286 triggers tasks #2422 and #2425. Task #2422 is not directly related to the preceding workflow.



The following example shows the Parent Workflow 2286 with a Condition: Source as Workflow Item #2422 and Status Equals.

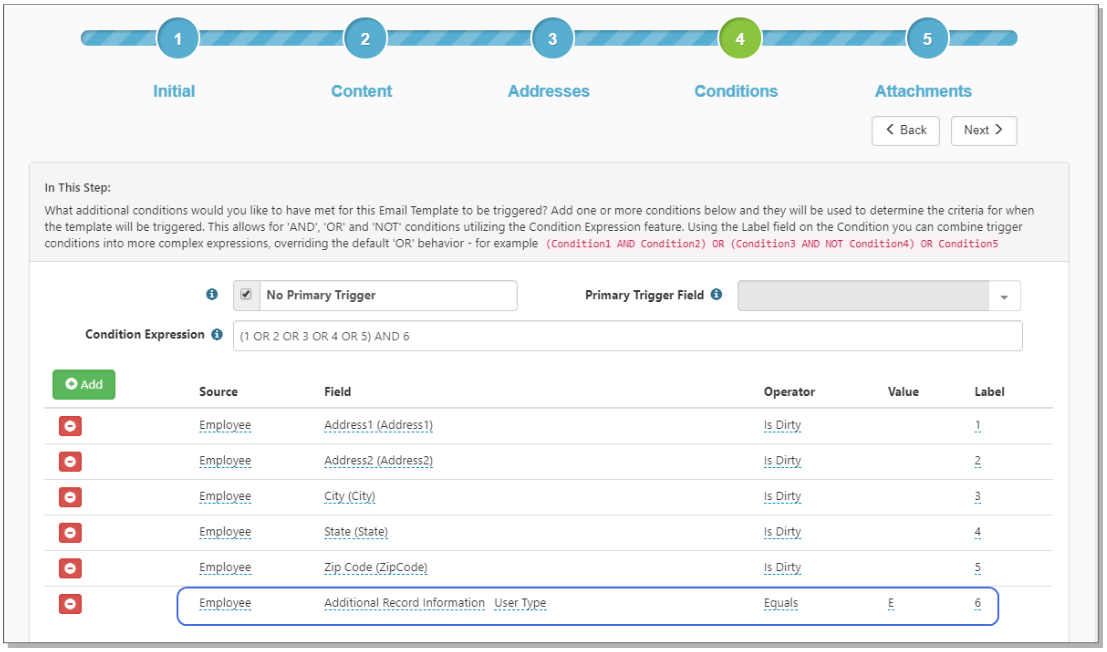


Tracking data modifications in PrismHR

Additional Information allows you to customize your Workflow Channels and Email Templates related to data that is changed in Prism to reflect the source of the change. When data is modified in PrismHR (for example, a Client's address changes, or an Employee is added), the PrismHR API generates an Event in a queue. The ClientSpace Ongoing scheduled process polls the Event queue for new Events (relative to the last time the scheduled process ran). If the Events contain data that is mapped by ClientSpace (using Import mappings), the Event is processed, and data in ClientSpace is updated.

AdditionalInformation is a data element provided by the PrismHR API. Each Event contains an AdditionalInformation element that, in turn, contains data appropriate to the type of the Event (Schema). For example, if an Employee's email address changes, the AdditionalInformation informs us which User made the change and the Type of that User (Internal or External).

The purpose of



AdditionalInformation is to allow Workflow Channels and Email Templates to react to specific conditions unique to each dataform save. AdditionalInformation data is available to ALL dataforms in the system. It is a pseudo-field in that it is not a true dataform field, but it is available in code to be exposed to the dataform save data. It is not visible on the dataform in the application.

In Workflow Channels and Email Templates, the additional information is available as **Additional Record Information** and has an associated user type.

Customizing workflow: Adding and editing Time Tracker Categories

Tracking Time can be a very important part of your business acumen, but tracking the time is only part of it. You also need to make sure that tracked time is allocated appropriately. This can be accomplished by configuring Time Tracking categories to match your business needs. This topic provides details on how to configure time tracking in your ClientSpace installation.

To configure Time Tracking categories:

1. First, determine if the appropriate Category Groups have been configured for your environment. Go to **System Admin** > **Lookups**.

The Lookups dashboard opens.

2. Click **More** and for **Group**, select **Time Tracker Category** and click **Search**.
3. Review the lookup list and If required, add any additional time tracker groups you need.
4. Go to **System Admin** ⚙ > **Advanced** > **Time Tracker Categories**.
   The Time Tracker Categories dashboard opens.
5. Click **Add**.
   The Time Tracker Categories form opens.
6. Provide a **Category Name** and select an appropriate **Category Group**.
7. Click **Save**.
8. Continue until all Time Tracker Categories have been configured.

To verify your new categories:

1. Open a case, task, or workspace.
2. Verify your new categories by adding a time tracker record and reviewing the Time Tracker Categories list.

Configuring default time tracking for task categories

Tracking time can be an essential daily process to ensure that you are focusing on resource utilization. To help streamline your processes, you can configure the system so that it automatically sets the default time tracking category from the task category. The configuration occurs on the metadata of the Task Category lookup.

To configure default time tracking for task categories:

1. Go to **System Admin** ⚙ > **Lookups**.
   The Lookups dashboard opens.
2. Filter the list for *task category*.
   The Task Category entries display.
3. Review the list, select an entry, and click **Edit** (if applicable).
   The Lookup Details form opens.
4. In the **Action Center**, click **Open Metadata**.
   The Task Category Metadata form opens.
5. In the **Default Time Tracker Category** list, select an appropriate entry.
6. Click **Save**.

Using Time Tracking Categories

When configured, the metadata allows the system to automatically set the category for any time tracking record by using the associated task category metadata in the following way.

To configure default time tracking for task categories:

1. From the user modules bar, click **Tasks**.
   The Task Manager dashboard opens.
2. Click **Add**.
   The Workspace Selector list displays.
3. Select a **Workspace** and click **GO**.
   The New Task form opens.
4. Select a **Category**.

   TIP: Select a Category before you click Start Timer. Each time you start the time tracker, a new record is created. If you click Start Timer before you select a Category, the record is created with no associated category. Additionally, you cannot save the new task until a category has been selected. If you start the timer before you select a Category, then after you select a Category and Save, you must then start the timer again.
5. Complete the remaining necessary fields.
6. Click **Save**.
7. In the **Action Center**, click **Start Timer**.

The timer begins for the newly created task.

To view the time tracker dashboard:

- From the user modules bar, click **Time Tracker**. You may need to click **View** > **Time Tracker**.

  The Time Tracker dashboard displays.

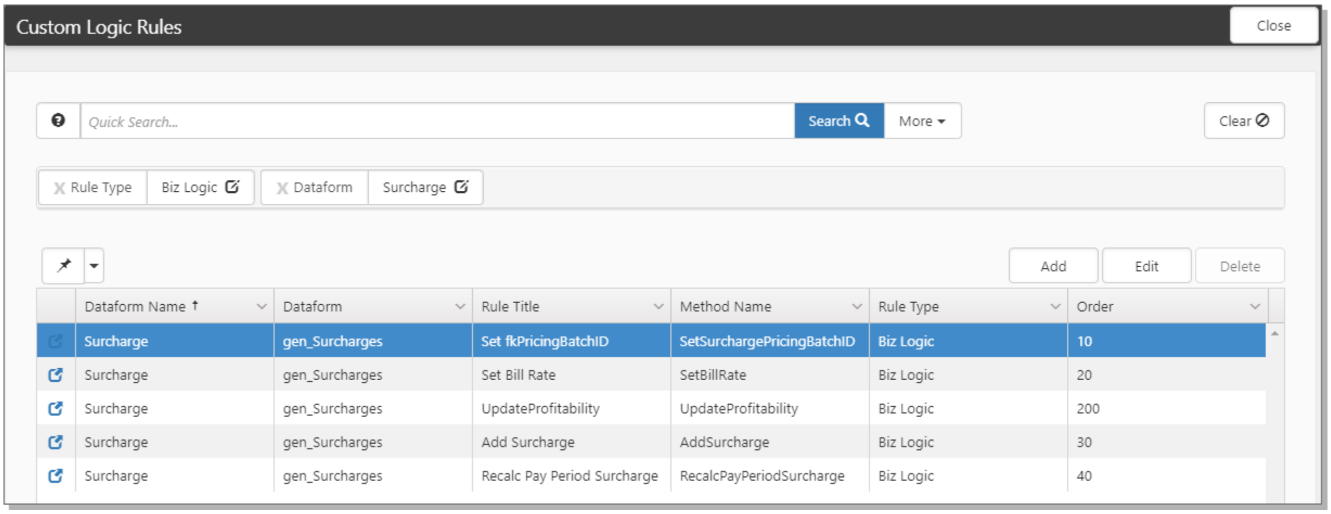
Cloning Surcharges with Workflow Channels

You can clone Surcharges with Workflow Channels with some simple setup configurations. First, you must update the business rules on Surcharges. Next, you must configure a Workflow Channel to clone the Surcharge. This topic guides you through the configuration.

The surcharges clone when you click **Generate Quote** on the Pricing Console. If there is more than one Surcharge to clone, just add it as another item on the same Workflow Channel. Also, you may want to restrict Surcharges to clone for only certain Contract Types. If so, just configure additional conditions.

Configure the Business Rules

In this step, you want to update Business Rules on Surcharges to run on the Quick Create and Default pipelines. You must configure the following rules: SetSurchargePricingBatchID, SetBillRate, UpdateProfitability, AddSurcharge, RecalPayPeriodSurcharge.



To configure the business rules:

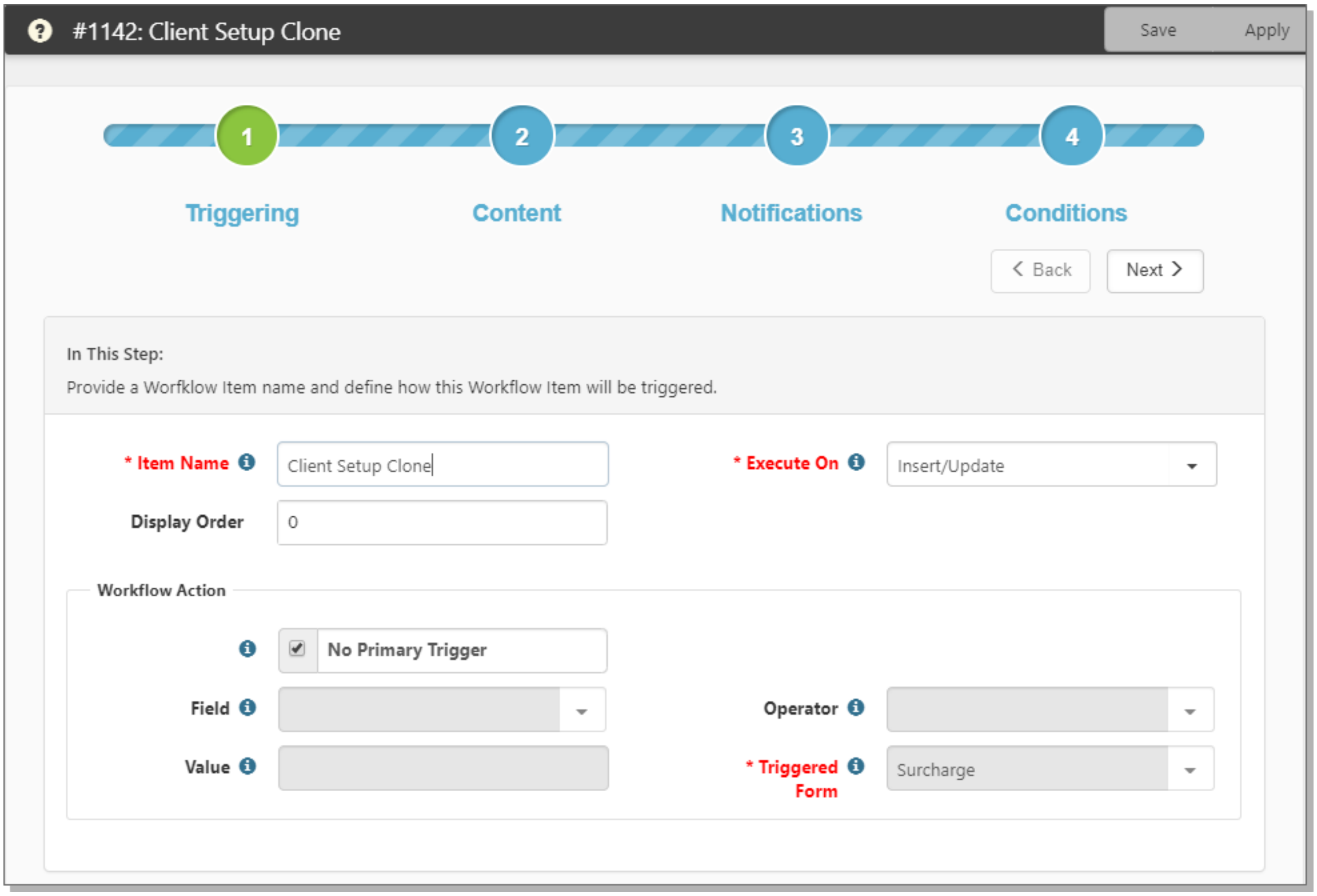
1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules display.
2. In **More**, search for Rule Type > Biz Logic, Dataform > Surcharge, to locate the methods (see screenshot).
3. Open (**Jump**) a Method Name, such as **SetSurchargePricingBatchID**.
   The Rule Details form opens.
4. In **Execution Pipeline**, add **Default** and **QuickCreate** (if not present).
5. Click **Save**.
6. Repeat this procedure for all 5 rules.

Configure a Workflow Channel to clone the Surcharge

In this section, you will configure a Workflow Channel with Triggering Form = Pricing Batch and Execution Pipeline = QuickCreate. If there is more than one Surcharge to clone, add it as another item on the same Workflow Channel.

Step 1: Initial

In this step, we create the Channel descriptor. In the top section, we define the Channel name and the Dataform from which the Workflow will be triggered, as well as who owns the Channel. The Workflow Action configures the triggering action for the first workflow as well as what form or task will be generated.



To configure a Workflow Channel:

1. Go to **System Admin** ⚙ > **Workflow Channels**.
   The Workflow Channels dashboard opens.
2. Click **Add** to begin creating your new workflow.
   The Choose Workflow Triggering Type dialog opens with "What type of triggering will the new Workflow use?".
3. Select **Real Time**.
4. Complete the form fields.

Channel Name	Provide a unique Channel Name. For example, *Surcharge Clone from Pricing Batch during Quick Create*.
Triggering Form	Select **Pricing Batch**.
Execute On	Select **Update**.
Execution Pipeline	Select **QuickCreate**.
Workspace Template	Keep the default: All Templates.
Channel Description	Provide a brief description of this channel.
Channel Owner	Defaults to the current user. Set it to the owner of this process.
Workflow Action	This section is dedicated to the primary triggering condition for the channel.
No Primary Trigger	Select this option.
Triggered Form	Select **Surcharge**.

The wizard progresses to Step 2 Content.

Step 2: Content

Information entered into the fields is copied to each cloned object created by this channel.

> Let the Business Rules manage the default values on the Surcharge. Ensure that only the Surcharge Type fields are visible on this step. If other fields are exposed, they will be cloned as shown and override the default values usually handled by the Business Rules. To remove the visibility of these extra fields, on Field Properties, set the fields as not triggerable.

1. In **Item Name**, enter a brief description of what this workflow does.
2. In **Surcharge Type**, click the link **None**.
   The Surcharge Type Options dialog box opens.
3. Select **Admin Workspace**.
4. In **Record**, select an appropriate Surcharge, such as **Client Setup**.
5. Click **Ok**.
   You are returned to the wizard.
6. Click **Next**.

Step 3: Notifications

- Click **Next**. You can skip this step.

Step 4 Conditions

This is where you add conditions. A Workflow Channel requires at least one condition. A Pricing Batch is always added with the Status set to New, so this is a safe assumption. This is where you configure Pricing Batch = New and any other additional conditions that may be applicable such as Contract Type = X.

1. Select **Only trigger this workflow once**.
2. Select **Publish**.
3. Click **Add**.
   A row opens to add a condition.

Source	Select **Pricing Batch**.
Field	Select **Status (luBatchStatus)**.
Operator	Select **Equals**.
Value	Select **New**.
Label	Leave empty or provide a Label if you need to use Condition Expression.

4. Click **Finish**.

Note: In Step 1, we do not use a Primary Trigger Condition because a field must be dirty. A Stored Procedure creates the Pricing Batch outside of Biz Logic; therefore, it is not dirty. After created, the Pricing Batch is then saved back through the Dataform Pipeline as an Update and run through Biz Logic. When this happens, the Batch Status is not evaluated as dirty.

5. Publish and test your workflow.

Server Data Proc 1 for workflow tasks triggered from Client Service Case dataform

There are times in Workflow Channel triggering when configuring a trigger condition, triggering data is not on the Client Service Case dataform. You can use Server Data Proc 1 to configure the Trigger Condition on Workflow Channels for Client Service Cases.

Server data procs provide a methodology for retrieving relational data for dataforms of a client workspace. Format server data field replacement as {SDP1.Fieldname} or {SDP2.Fieldname}.

Server Data Proc 1 returns the following data from the Client Master dataform.

Field	Field name
Client Number	ClientNumber
Contract Type	ContractType
Pay Frequency	PayFrequency
Legal Entity	LegalEntity
Processing Center	ProcessingCenter
Sales Region	SalesRegion
Workflow Group	WorkflowGroup

If an Employee is selected, Server Data Proc 1 also returns the following data from the Employment dataform.

Field	Field name
Employment Status	EmploymentStatus
SUTA State	SutaState
Employment Type	EmploymentType
Job Code	JobCode
Comp Code	CompCode

The Client Service Case dataform is provided for the PEO systems with a Server data proc. More information about the default Server Data Procs is in Default Server Data Procs.

Chapter 4
Dataforms

The heart of the ClientSpace system is configurable dataforms. Dataforms are your workspace building blocks. ClientSpace has been tailored to the unique needs of the PEO industry, primarily using the dataform architecture. Dataforms enable administrators to modify forms or create entirely new forms and sub-systems all without writing a line of code.

Configurable data management through dataforms provides some of the most dynamic and powerful capabilities embedded within ClientSpace. Global administrators can create and maintain configurable web-based data entry forms to match their data management requirements. The dataform schema should be carefully modeled with the same care and strategic mindset as would be taken during the data modeling phase of any custom software development project. With careful planning and implementation, ClientSpace dataforms can provide the tools to design and build the solution most suited to your business needs.

We'll start with the basics and together build a form from scratch reviewing all the various properties of the form and field objects as well as the growing variety of data types. We'll explain other topics understood by few outside of PrismHR such as dataform security, lookup metadata, and tabbed forms. Fasten your seat belts, this ride is not for the faint of heart.

> Dataform administration is a ClientSpace Advanced Administrative function and requires Global Admin permission and an Enterprise License.

This chapter describes dataforms, what happens when they are created or changed, and how they are managed within the application. The following topics are included in this chapter.

What is a dataform?

- Dataforms dynamically create and manage configurable data collection points.
- When you add a dataform, a new table is added to the database.
- Dataforms enable workflow systemization.
- Additionally, dataforms provide granular security down to the field level.

Before you begin

This area of the system requires an Enterprise license with access to Advanced Admin. If you do not have an Enterprise License and are interested, please log an Extranet case.

Using dataforms, global administrators can create new forms, add, delete, or modify fields on existing forms. Additionally, global administrators can relate forms in one-to-one or one-to-many relationships to each other. The configuration of these forms results in a relational data model with tables and properly typed (such as integer, decimal, varchar) data fields embedded within the ClientSpace database. During creation, a set of stored procedures (one set for each dataform) are generated to allow various parts of the application to interact with the tables and fields.

All dataforms must exist within a workspace. The one exception to this rule is a special dataform that is associated with the Other Info tab on the Organization Detail page or the Contact Manager. Different types of workspaces may include various sets of relational dataforms with some forms overlapping from workspace to workspace. The dataforms that are related to a workspace are inherited from the template used to create the workspace.

Dataforms are a suite of tools that comprise the Dataforms Engine. The dataform engine allows you to:

- Dynamically create and manage configurable data collection points
- Generate Web forms and fields for data collection
- Allow for Workflow systemization
- Allow for extremely granular security, down to the field level

Adding a dataform to the system:

- Generates a new SQL table in the server
- Adds your configured fields to this table as columns
- Automatically configures the data columns with appropriate values based on field selection options
- Automatically generates foreign key relationships between tables (Parent / Child forms, Lookups, and so on)

Dataform security tips

Draw a diagram of the dataform before adding security to it so that you can map out how you would like the field access to occur. This approach helps you envision users that need access to the dataform and help you to better plan out how to architect the security and associated user roles.

Naming conventions

System table names (tables generated by PrismHR developers) are automatically generated based on Dataform Name preceded by **gen_**.

Example:

gen_DataFormName

Custom tables created by our clients in their individual installs are distinguished from normal gen tables with a leading **z**.

Example:

gen_zDataFormName.

The Dataform Properties form presents the fields in groups. The first step is to configure the general properties such as, name, type, field, group, and description.

Adding a dataform

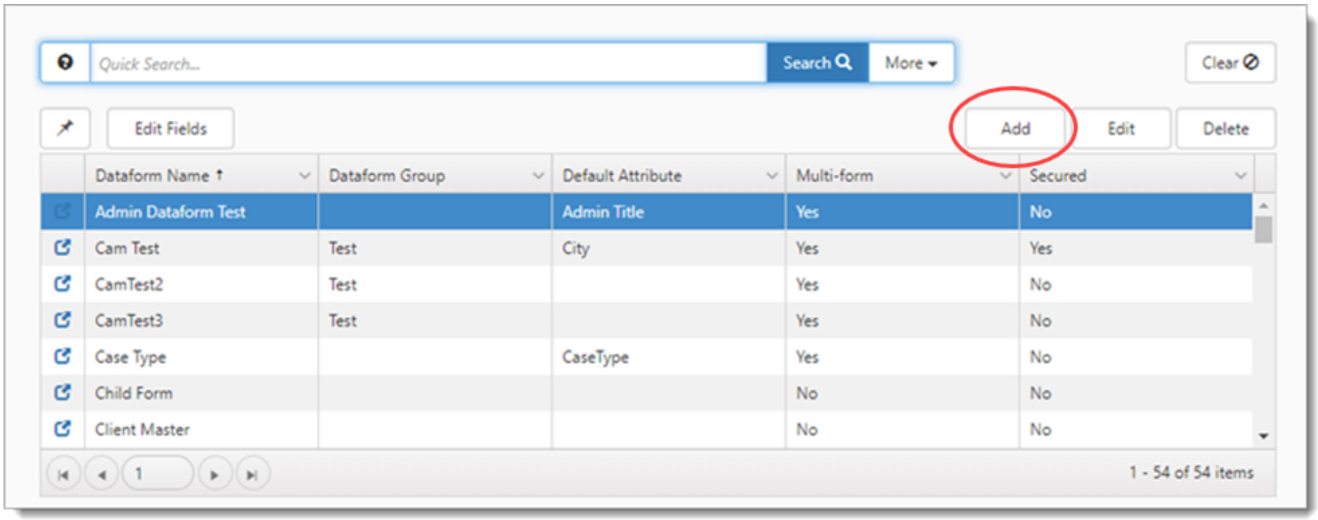
Before you create a dataform, consider:

- The type of data you need to track
- How that data is used in ClientSpace and other systems
- The relationship between the new dataform and others in your system

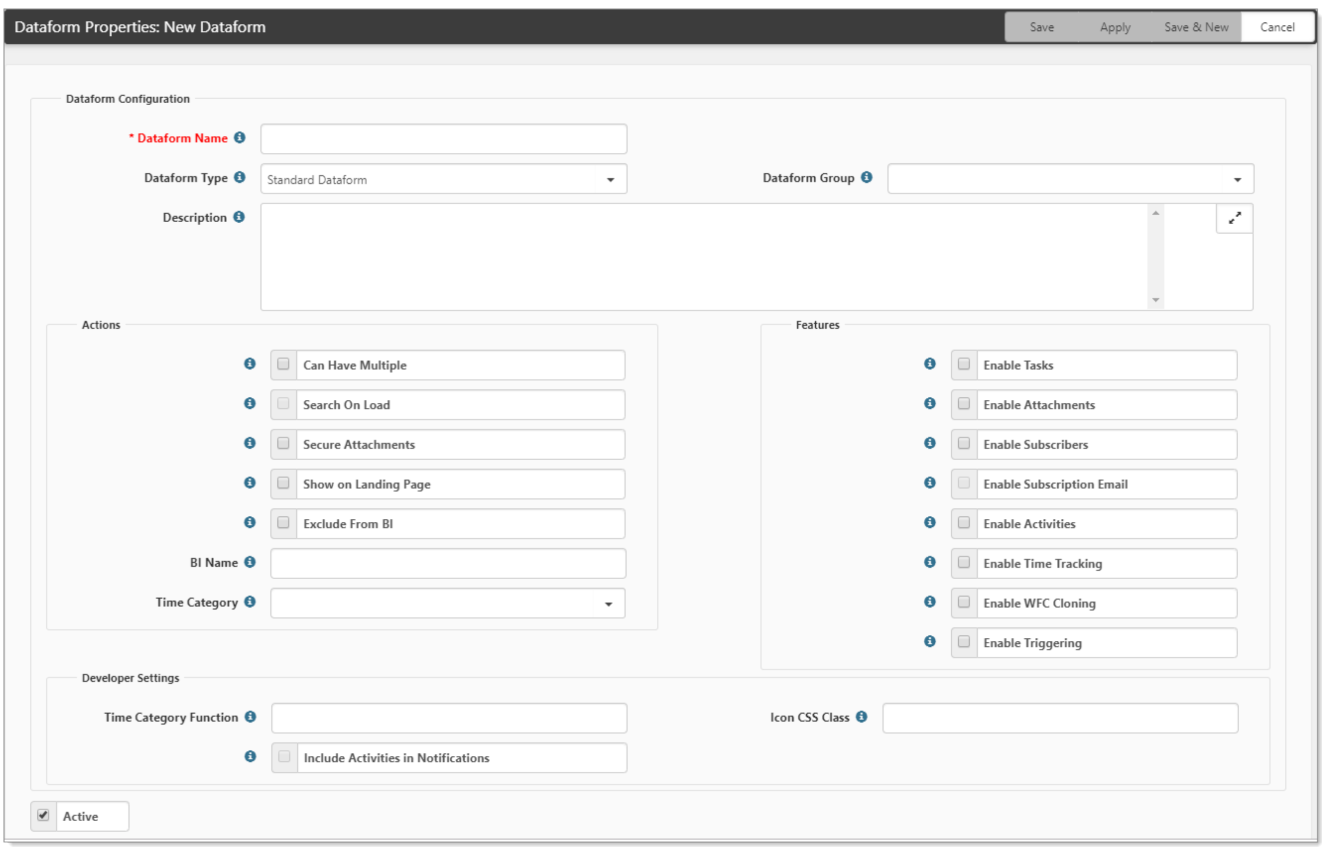
Advanced planning can save time after you publish the dataform and start to collect data. After you have determined how you would like to build out your new dataforms, you can begin the process. The first step is to add the dataform. This process creates a new table in the SQL database with the predetermined system columns.

To add a new dataform:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.



2. Click **Add**.
   The Dataform Properties: New Dataform form opens.



3. For **Dataform Configuration**, complete the form fields as required.

Dataform Name	This is the name of the dataform that is displayed within the application, such as in lists. Required.
Dataform Type	Select the type: • Standard • Organization • Contact
Dataform Group	Grouping dataforms makes them easier to search for later.
Description	Provide a short description of the dataform and its purpose.

4. After you configure this first section, click **Apply**.
5. After you **Apply** changes, then you see the **Table Name** and **Default Field** fields.

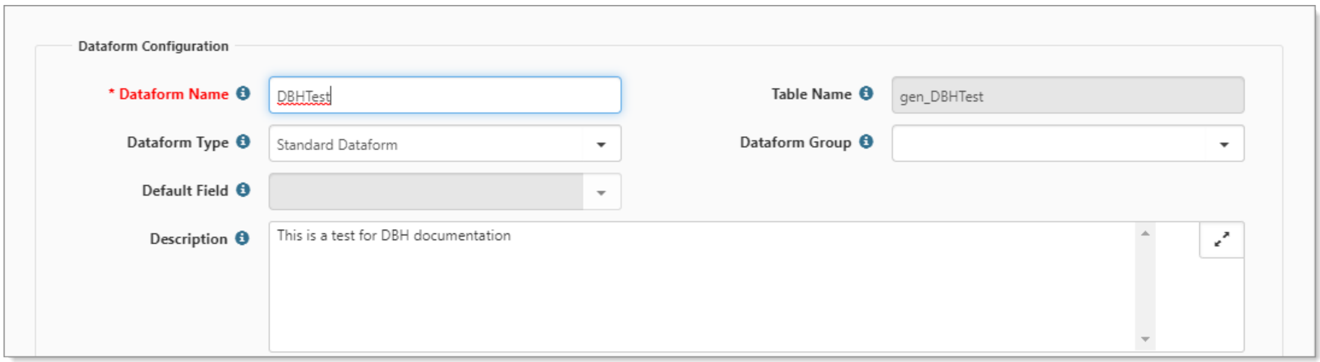


Table Name	Displays the generated table name that is stored in the database. This can be useful for reporting. You cannot edit this field.
Default Field	When you associate one dataform with another through linked fields, the default attribute is displayed in the list. It is a best practice to make the default attribute field of the form Required, so any linked forms have something to display.

Next: Action Center

The next step is to secure the form, add and configure fields, and add and configure tabs. These actions are performed in the Action Center pane (on the right side of the screen).

To continue with the configuration:

1. In the **Action Center**, click **Secured**, **Fields**, or **Tabbed Forms**.

2. Use the following field descriptions to guide you through the configuration.
   - **Secured**: Secures the form and generates a security entity for the field in the format of **gen_TableName**. For more details about using security entities in Role security, review Configuring Organization and Workspace Security.
   - **Fields**: This is where you add and configure fields for this dataform (see Adding dataform fields).
   - **Tabbed Forms**: This is where you add and configure tabs for any foreign key related child forms of this dataform. (Child forms have a Parent form field that uses this dataform as the Parent Form. See Adding dataform tabs.)

Next: Customize the Features

To further customize your dataform:

1. On the Dataform Properties form, locate the **Features** area, where you find an array of options.
2. Use the following field descriptions to guide you through the configuration.

Enable tasks	Adds the My Tasks action item to the dataform. Tasks added from this dataform are linked to this dataform.
Enable Attachments	Adds the Attachment Action Item to the dataform, providing the ability to attach files to the dataform.
Enable Subscribers	Adds the Subscribers Action Item to the dataform, which allows you to automatically notify system users from email, about changes to the form.
Enable Subscription Emails	This field sets which notification system is used when producing dataform subscription emails. If selected, a core system notification is produced when the record is changed. If selected and a published Email Template has been configured for this dataform, that template is used. If cleared and no template exists, subscription emails are not sent.
Enable Activities	Determines whether Activities may be attached to and displayed on this dataform.
Enable Time Tracking	Adds the Time Tracker action item to the dataform. Time tracked from this icon is linked to this dataform.

Enable WFC Cloning	Used to determine if a form is available to clone[1]. This means that the form can be created by the Workflow Channel as the triggered form. Clearing this option initiates a validation to determine if this dataform is used as a Triggering Form or triggering condition in a Workflow Channel. When used, a warning message is displayed with a link to the referenced items. Only published Workflow Channels are referenced. This option cannot be cleared until the dependencies are removed.
Enable Triggering	Used by Workflow Channels and Email Templates to determine if this dataform is available as a Triggering Form during the initial Workflow Channel and Email Template configuration. Clearing this option initiates a validation to determine if this dataform is used as a condition in a Workflow Channel or Email Template. When used, a warning message is displayed with a link to the referenced items. Only published items are referenced. This option cannot be cleared until the dependencies are removed.

3. After you configure this section, click **Apply**.

Viewing audit information

The audit trail contains the admin data, as well as other, create and change events for the dataform and associated fields. Dataform properties also provide the following information:

- Date Created
- Created By
- Date Updated
- Updated By

[1]Cloning is when an object is generated by copying a template example of that object. Cloning is often used to provide consistency of data, or for workflow design.

To view the audit trail:

1. From an open dataform, in the **Action Center**, click (**Audit Trail**).
   The **Audit Trail For: *something*** is displayed.
2. The list shows Date, Table Name, Field Name, Action, Original Value, New Value, and Login ID.
3. Click **Close**.

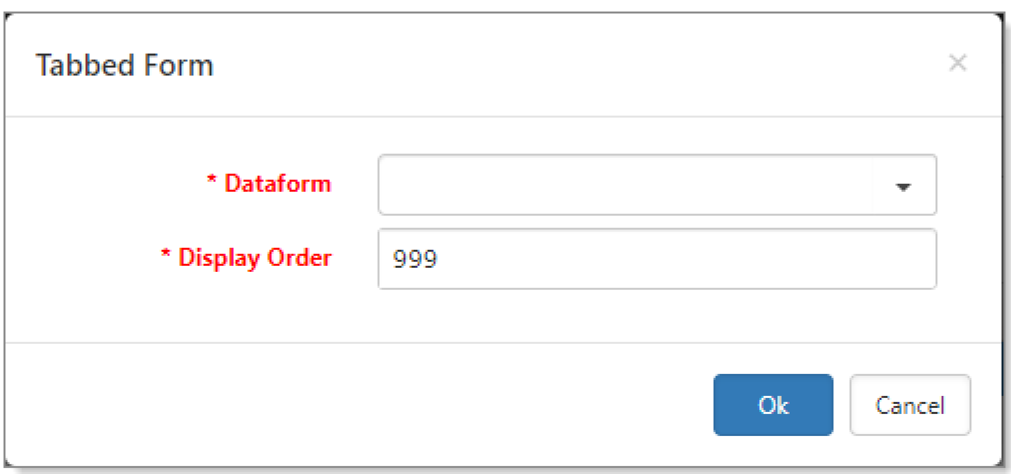
Adding dataform tabs

Create the tabbed dataforms in Dataform Administration, ensuring that you include a Parent Form datatype field, configured to point at the Parent form where you would like the tab to appear.

> You can add 5 tabs to a parent dataform. If you need to add more than the default limit, please log a case in the Extranet.

To add dataform tabs:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Search for the parent dataform and open the form.
   The Dataform Properties form opens.
3. In the **Action Center**, click **Tabbed Forms**.
   The Tabbed Forms list displays.
4. Click **Add**.
   The Tabbed Form dialog box opens.



5. In the **Dataform** list, select the tabbed dataform.
6. Provide a **Display Order** (this is the order in which the tabs will appear at the top of the dataform). The display order is numeric.
7. Click **Ok**.

Dataform Properties

Form properties control the basic properties of the SQL table, such as Table Name. After saving the initial dataform, you cannot change the basic properties of the SQL table. Therefore, be sure to plan carefully before you save. Consider the name of a dataform carefully because the only way to change a table name is to delete the dataform and any data you may have stored in it and start over.

The field **Dataform Name** is simply a label and can be changed after the initial save to provide a more descriptive title of the dataform. However, the best practice is to make the table name as short as possible while still being descriptive. For example, you may want the title of the dataform to read as *Family Medical and Leave Act Data*. A better table name would be *gen_zFMLA*.

To accomplish this:

1. Save the form initially with a dataform name of **FMLA**.
2. Change the **Dataform Name** field to the more descriptive **Family Medical and Leave Act Data**.

Dataform field naming standards

This topic describes the standards and conventions for naming dataforms and dataform fields.

General guidelines

Care should be taken when first creating a dataform, as the underlying database table is generated from the name at the time of creation. For example, if a dataform is added with the name Certs, a database table **gen_Certs** is generated, where gen_CertificateOfInsurance would have been preferable.

So, when adding a dataform, think about what you would want the database table to be named, then, after it is created, the form name can be changed to something more human readable or industry jargonized, without having an effect on the underlying database table.

Field names are in Pascal Case, which means that field names are created by concatenating capitalized words. For example:

- FirstName
- GrossPayroll

- MinAdminPerAccount

Prefixes are all lowercase. For example:

- luState
- fsOrganizationInformation

When using the ID suffix, both letters should be uppercase. For example:

- fkEmployeeID
- fkUserID

Note: Always examine the automatically generated field name after typing in the label to make sure they are Pascal Case and have the appropriate prefix and suffix. DO NOT leave a field with a long winded name because of what the label is. For example, a field with the label “Are union workers or employees under collective bargaining agreements employed?” should not be left as the automatically generated name. In this case, it was appropriately shortened to **luEECoveredUnderCBAEmployed**.

Datatype guidelines

Prefix fk and suffix ID

Any fields that store an ID to another entity should have the prefix **fk** and the suffix ID.

Example: fkEmployeeID

A few examples of foreign key datatypes:

- Any of the Organization or Contact datatypes
- Any of the User datatypes
- Parent Form
- Comp Code Suggest
- Employee Type Ahead
- Project Type Selector
- Role Selectors
- Workspace Selectors

Prefix lu

Lookup (core) have the **lu** prefix.

Example: luStatus

Prefix mlu

Lookup – Multiple (core) have the **mlu** prefix.

Example:

- mluCommissionMethod
- mluCertifications

Is, Has, Can

Check boxes store a Boolean value (True/False, Yes/No), so they should start with the word **Is**, **Has**, or **Can**, depending on what sounds more correct.

Example:

- IsBrokerSubmitted
- HasCustomPayroll
- CanCreateWorkspace

Date

Date fields should begin with the word **Date**.

Example: DateReported

Prefix fs

Field Sets should have the prefix **fs**.

Example: fsContactInformation

Prefix sf

Secure attachments should have the prefix **sf**.

Example: sfLossHistory

Other datatypes

All other datatypes should stick to the Pascal Case convention.

Examples:

- GrossPayroll (Decimal)
- TotalEmployees (Integer)
- GeneralNotes (TextArea or Log)
- LastName (Text)

- PrimaryEmail (Email)

Configuring Dataform fields

Now that you have the container for your data, it's time to start adding the fields to store the individual pieces of information you want to track. Dataform fields can be as simple as a few fields together on a page or can be complex, dynamic groupings of fields that hide or display based on predetermined logic. Taking the time to map out your dataform layout pays off in the overall amount of time you invest in the final version of the dataform. For more details about dataform fields, see Configuring dynamic field display.

Best practices for field configuration

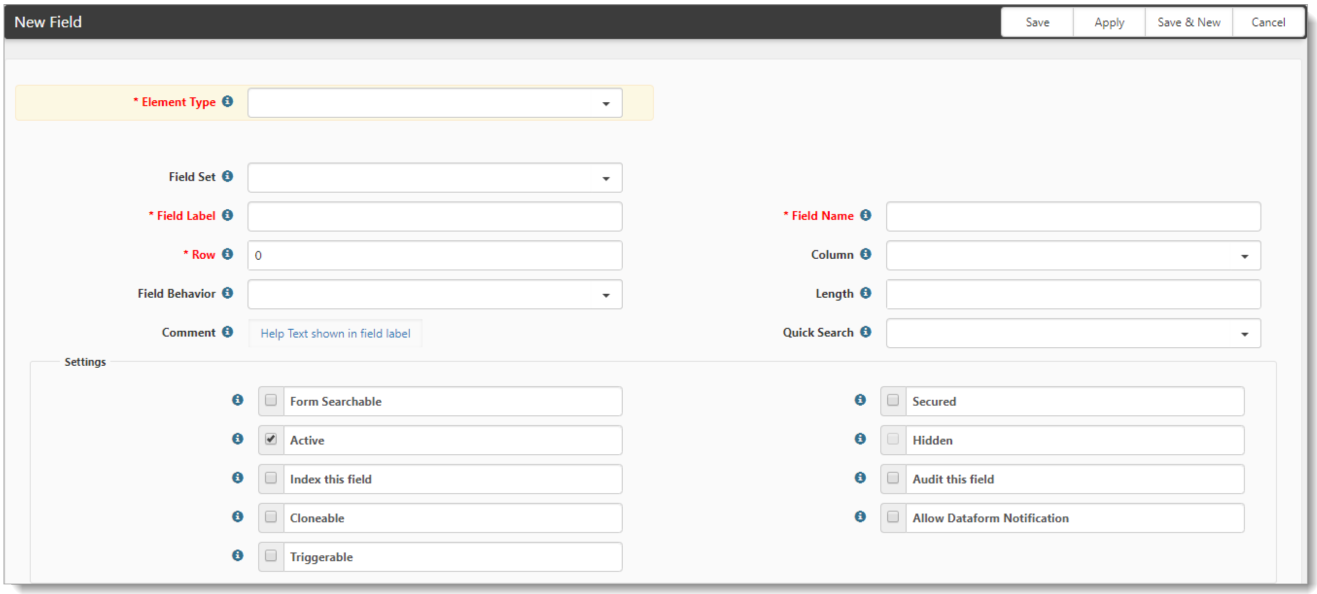
- Leave space between your field rows in the numbering scheme should you need to add more fields later (10, 20, 30).
- Restart numbering sequences within each fieldset to group the data elements together visually.
- Fieldsets should have their own numbering sequences independent of the numbering within the fieldsets.
- Multiforms require the additional step of configuring columns for the list display. If this is not configured, you receive the error "Column headers have not been defined for this dataform" when you attempt to use the dataform in a workspace.
- You cannot add more than 150 fields to a dataform.

Adding dataform fields

Dataform fields contain information that you want to store and track. The maximum number of fields allowed on a dataform is 250. When this limit is reached, the (New) button is disabled, and a message displays, "Only 250 fields can be added to a single dataform." If you need more than 250 fields, consider using a dataform tab or add another single dataform link.

To add fields:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. From the list, select an entry and click **Edit** or click (**Jump**).
   The Dataform Properties form opens.



3. In the **Action Center**, click **Fields**.
   The Fields list of the dataform displays. From here, you can Open, Delete, and Add (New) fields.
4. Click (**New**).
   The New Field form opens. You cannot configure a dataform (single or multiform) to contain more than 250 fields. When this threshold is reached, a message displays, and the New button is inactivated.
5. Use the following field descriptions to continue the configuration.

Element Type	Determines the type of data you store in this field. ClientSpace has a full array of different datatypes. The most commonly used datatypes can be found in the topic Configuring your dataform datatypes. For an in-depth look at the Lookup datatype, see Configuring lookups.
Field Set	Outlines that hold and organize other fields. No actual SQL field is created, and no data can be stored in a fieldset.
Field Label	The field label is displayed on the dataform. By default, the underlying field name is set to the field name with any spaces or special characters removed. Click the field name to open the field properties page.
Field Name	The name of the field that is created on the SQL table. By default, the field label is stripped of its spaces and special characters and

	used as the Field Name. The field name can be overridden as needed and can be set to anything that is accepted by SQL Server as a valid field name. Duplicate field names are not accepted. Field labels are often duplicated in developing large dataforms. As duplicate fields are created, you must modify the field name to make it unique to save the field. After the field is saved the first time, the field name CANNOT be changed. Carefully map out your field naming standards before creating dataforms. ClientSpace uses a standard naming convention when naming a field based on the datatype of the field. It is a recommended best practice to use these same conventions in your own field names. To discover the best practice for your field type, see Dataform field naming standards.
Row	The row property determines the vertical ordering of fields and fieldsets. Fields that are within a fieldset are ordered within that fieldset. Though the sort uses a standard numeric order, it is recommended to set rows in increments of ten. This allows for reordering fields or adding fields between rows without reordering the entire form.
Column	The column property is hardcoded to dictate a two-column format. Technically, you can select the same row and column for more than one field, and they align alphabetically. However, this generally causes problems in the presentation of the dataform to the user.
Field Behavior	
ReadOnly	You cannot edit this field. It is read-only. Usually, ReadOnly fields are set automatically by business logic.
Required	This property can only be set from within the field properties page. When selected, the field must be completed for the dataform to be saved. This function is overridden if the field is contained in a hidden field set.
Length	Specifies the maximum length of the field entry. This property is

	valid for text and integer data types.
Comment	The text in Comment provides contextual help for dataform users. When comments are added to any dataform field, the info bubble next to the field label is enabled, and on hover, the info bubble displays the comment text in a pop-up.
Quick Search	Selecting a value in this list adds the field to the Quick Search on multiform searches. Fields that link to other dataforms are not eligible for Quick Searches. Available options (quick search types) include Starts With, Equals, and Contains (% search).
Form Searchable	Is this one of the Search parameters available in a multiform list? This property can be set from the form list page or from within the field property page.
Secured	Secures the field and generates a security entity for the field in the format of gen_TableName_FieldName. For more in-depth documentation about using security entities in Role security, review Configuring Organization and Workspace Security.
Active	Determines if the field appears on the dataform. Deactivating a field is preferential to deleting it because deleting the field removes it from the underlying SQL table and erases the data. When you deactivate or hide a field, you retain the data for later use.
Hidden	This property is only available for Field Sets. When selected, the field and its children are hidden when a dataform record is viewed.
Index this field	Marks the field for addition to the SQL table index. Searches based on Index this Field will run faster.
Audit this field	Marks the field auditable and is configured in System Admin > Advanced > Tables.
Cloneable	Marks the field as configurable when this dataform is created by Workflow Channels. Clearing this option initiates a validation to determine if this field is used by Workflow Channel dataform cloning. When used, a warning message is displayed with a link to the referenced items. Only published Workflow Channels are

	referenced.
Triggerable	Marks the field as available for use as a Triggering Field or as one of the Triggering Conditions when configuring Workflow Channels and Email Templates. When a field is marked (selected) as Triggerable, it displays in the field list on Email Templates and Workflow Channels. Clearing this option initiates a validation to determine if this field is used as a triggering condition in an Email Template or Workflow Channel. When used, a warning message is displayed with a link to the referenced items. Only published Email Templates or Workflow Channels are referenced. This option cannot be cleared until the dependencies are removed.
Allow Dataform Notification	If selected, this field is included in a dataform notification when dataform subscribers are emailed. Updated fields appear in bold in this email.

6. Click **Apply** when you are done.

Available field actions

When viewing the list of dataform fields, note the available actions:

Action	Action label	Description
	Open	Opens the field properties for the highlighted field.
	Delete	Deletes the highlighted field. For system fields, the Delete action is not available and displays as disabled. System fields can be easily identified because their field names do not begin with **z_**.
	New	Adds a new field.
	Save	Saves changes to the dataform fields list.

Deleting dataform fields

A few situations can exist that prevent a field from being deleted:

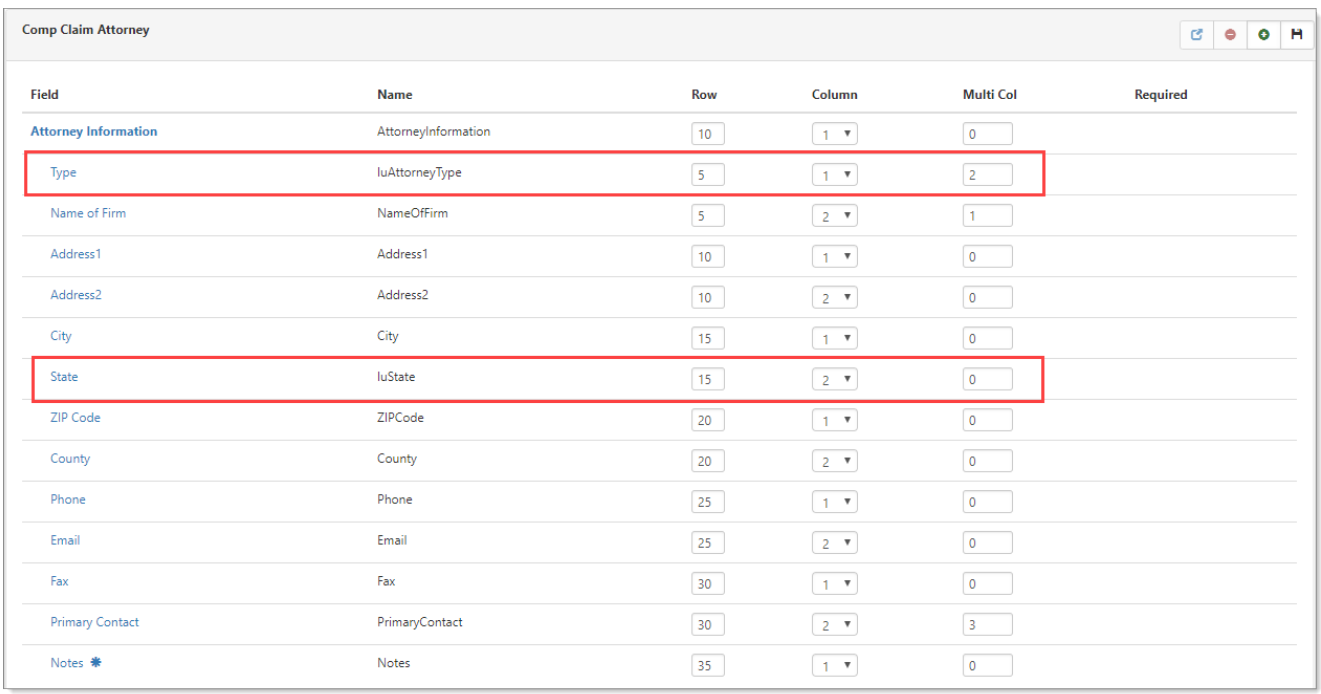
- The field is a **system field**. For system fields, the Delete action is not available and displays as disabled. System fields can be easily identified since their field names do not begin with **z_**.
- Other system configurations depend on the field. Dataform fields that are referenced by system functions. For example, rules, links, or field display conditions cannot be deleted until their dependencies are removed. If you try to delete a field that has a dependency, an error message displays in the delete dialog: "This field is used by the following System functions and cannot be deleted while these dependencies are in place: System Function". From the delete dialog, you can open the dependency.

After you Save the configuration, you can then view the form from Admin Workspace:

1. Go to **System Admin** > **Administrative Data** > **<groupname>**.
   Where <groupname> matches the Dataform Group value you selected during the initial Dataform Properties add process.
2. Alternatively, from your modules bar, select **Admin Workspace** (if you added to your modules bar).
3. In Admin Workspace, open the group, and within the group open the form.
4. Click **Add**.
   The form opens.

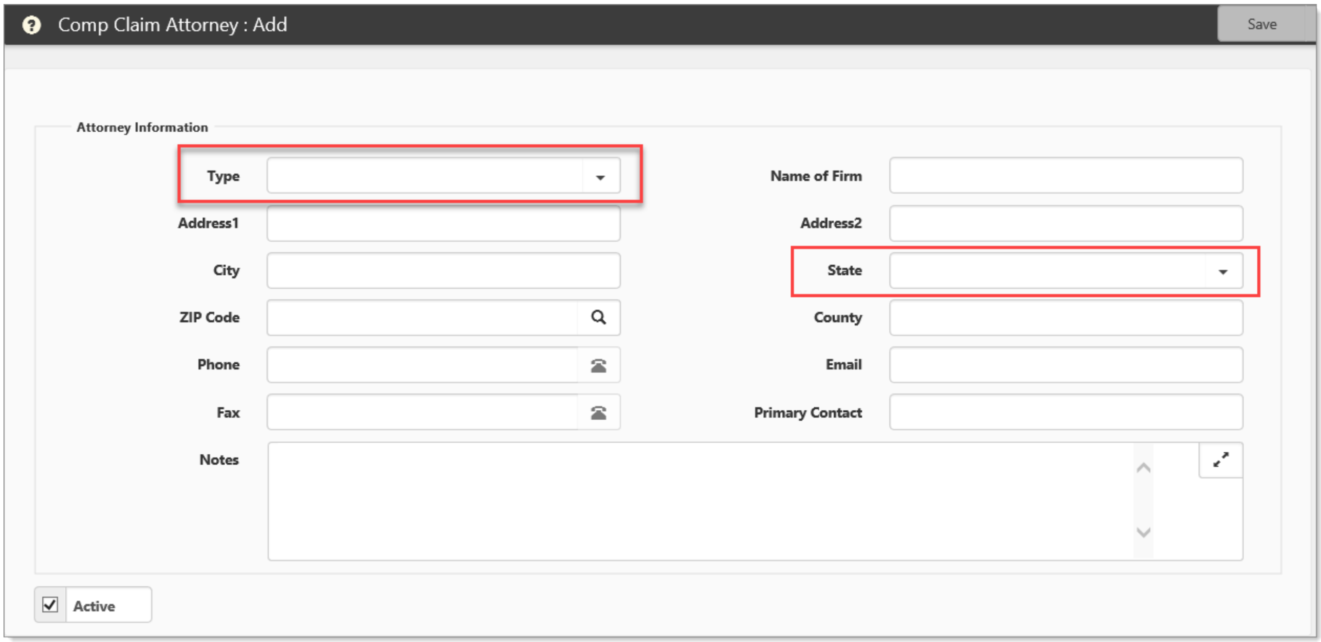
The following images illustrate:

- Dataform field mapping during the Add process
- The completed form, viewable through Admin Workspace



Comp Claim Attorney

Field	Name	Row	Column	Multi Col	Required
Attorney Information	AttorneyInformation	10	1	0	
Type	luAttorneyType	5	1	2	
Name of Firm	NameOfFirm	5	2	1	
Address1	Address1	10	1	0	
Address2	Address2	10	2	0	
City	City	15	1	0	
State	luState	15	2	0	
ZIP Code	ZIPCode	20	1	0	
County	County	20	2	0	
Phone	Phone	25	1	0	
Email	Email	25	2	0	
Fax	Fax	30	1	0	
Primary Contact	PrimaryContact	30	2	3	
Notes	Notes	35	1	0	



Changing number of decimal places

Sometimes you need to adjust the formatting of a decimal field to account for more precision. Use the following instructions to change the number of decimal places allowed in a decimal field. You must target a field with an Element Type that enables the Mask field.

To change the number of decimal places:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. In the list, select the targeted dataform and click **Edit**.
   The Dataform Properties for the dataform displays.
3. In the **Action Center**, click **Fields**.
   The list of fields displays.
4. Double-click the decimal field that needs to be changed. Alternatively, select the field and click (**Open**).
   The field form opens.
5. In **Mask**, specify the number of places that are allowed before and after the decimal. For Example: Insert 00.00 for a number that cannot exceed 99.99.
6. Click **Save**.

Adding time tracking to a dataform

This topic provides the step-by-step process to track time for workers comp cases by using the worker's comp claim function. This is easier than opening a second case just for the purpose to track time.

To add time tracking to a dataform:

1. Go to **System Admin** ⚙ > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Search for the dataform to which you wish to add time tracking.
3. Select the name of the dataform to highlight it.
4. Click **Form Properties**.
5. In the **Actions** set, select the **Enable Time Tracking** option.
6. Click **Save**.

The dataform that you updated should now display the **TimeTracker Action Item** in the Action Center.

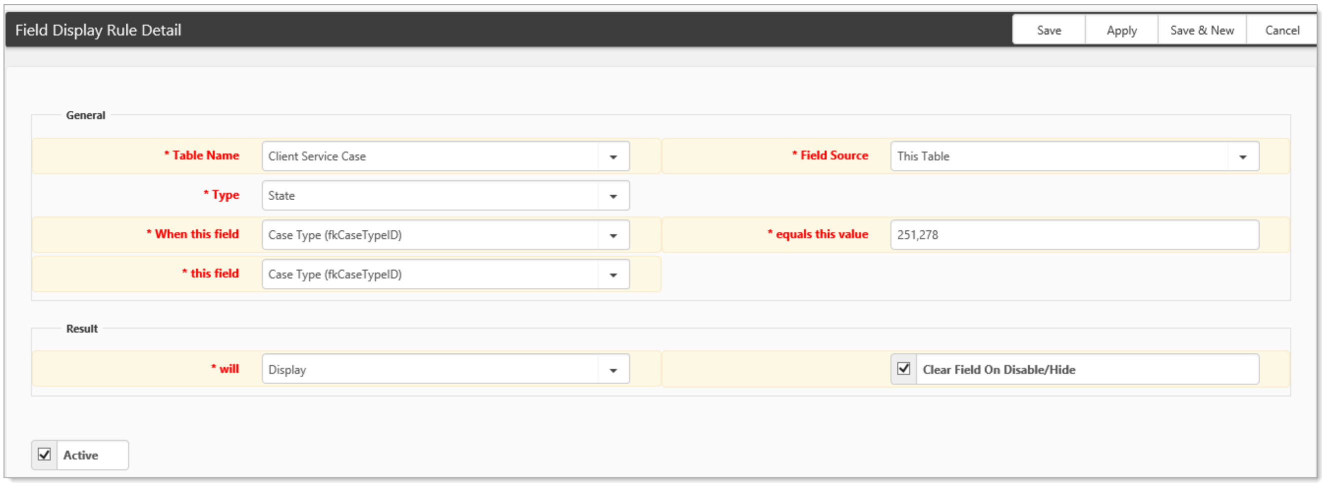
Configuring field display with multiple values

Sometimes, there may be a need to display a field conditionally when a field equals more than one value. The system does not allow the creation of a separate Field Display rule for the same fieldset (target table). However, a comma-separated list of values can be used instead.

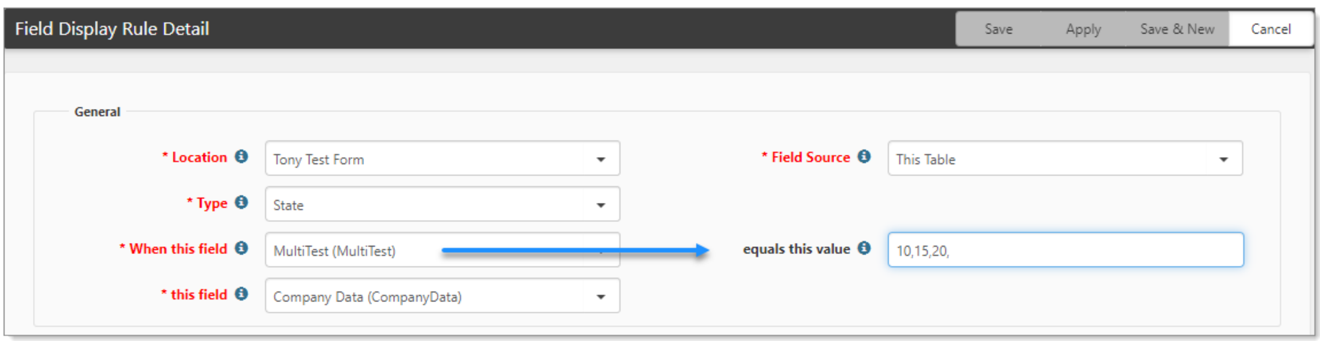
To configure Field Display:

1. Go to **System Admin** ⚙ > **Advanced** > **Manage Field Display**.
   The Field Display Rule Search dashboard opens.
2. Open the targeted field display rule.
3. Enter the targeted value in the **equals this value** field.

The following example, shows **When this field** is Case Type with **equals this value** as 251 or 278.



Additionally, you can include multiple values for a multi-lookup field. In the following example, the field **When this field** can have multiple values. The field **equals this value** is where you specify the rule values. Separate the values with a comma-delimited list.

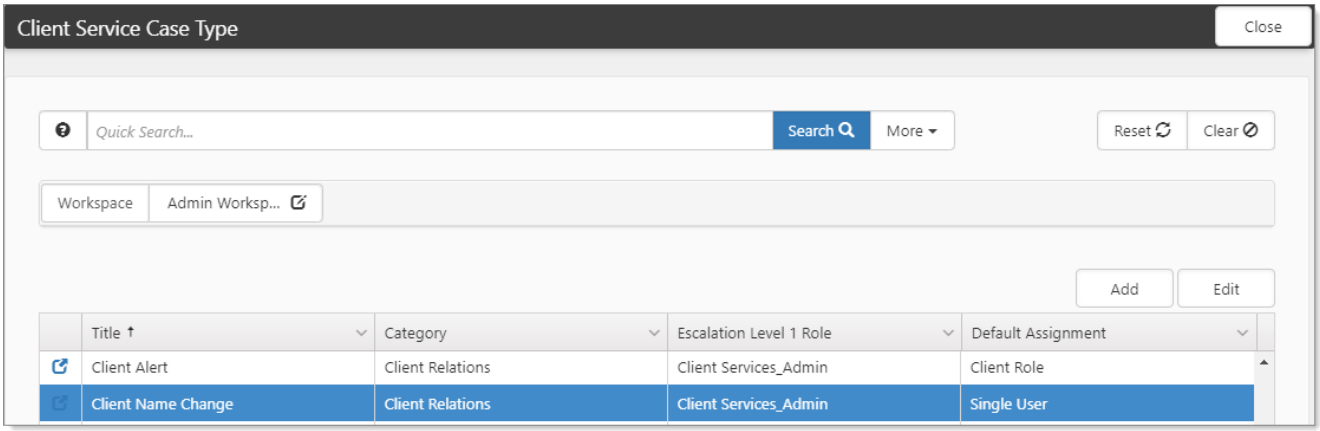


How to determine values for a specific use case

Often System Admins will want to use field display on the Client Service Case form, and that field display could be driven from Case Types. In the **equals this value** field, the primary key (Case Type ID, which is referenced) of the Case is what you would reference, and, you use a number rather than the display value of a Case. Ultimately, it is not intuitive which Case Type you're picking unless you know. Use this procedure as navigational help for when configuring field display for a specific use case (Case Types).

To determine the Case Type ID:

1. Go to **System Admin** > **Administrative Data** > **Client Service Case Type**.
   The Client Service Case Type dashboard opens.
2. Open the Type in question.
   For our example, we selected *Client Name Change*.



3. In the **Administrative Fields** fieldset, look for the **ID** of the record in question.

Use this number in the Field Display Rule.

Setting up and configuring Field Audit

Field auditing is helpful when troubleshooting issues to find when and where changes have been made to a particular field. ***

For a dataform field audits:

1. Select the **Audit this field** option for the applicable attribute.
2. The **Audit this field** option on the dataform field admin is disabled for Text Areas, Log fields, and Multiples.
3. When this option is selected, it creates a record in the Field Audit Configuration form.
4. If a previously selected option is cleared, the Field Audit Configuration record is removed automatically.

For the Organization only:

You must manually add a record to the Field Audit Configuration.

1. Go to **System Admin** > **Advanced** > **Tables**.
2. Add a **tblOrganization** record if it does not already exist.
3. Add the fields you would like to audit.

For security:

1. Global Admin has automatic access to the Audit icon.
2. Non-Global admins need to be configured as an Admin for the given dataform.
3. If the field being audited is on an Organization or Contact, the user needs to have the tblOrganization and/or tblContact security entity added to their role.

Note: *** A large number of audited fields can cause performance issues.

You can audit the following list of Org General Tab database field names:

fkContactIDPrimary	fkUserIDOwner	Active
Name	EmployerIDNumber	OrganizationOwnerName
AKA	Address1	Address2
City	State	PostalCode
Country	County	Phone
Phone2	Fax	Website
crCategory	crSource	crStatus
crBusinessType	HotList	Locked
FollowUpDate	StatusChangeDate	StatusChangeUserId
CreateDate	CreateUserId	UpdatedDate
UpdatedUserId	fkParentOrganizationID	Lineage
IndustryCode	ImportID	AllowImport
OrganizationGUID	fkTeleSalesRepUserID	

Defining dataform multiform list column headers

The **Multi Col** column is available for multi dataforms, single dataforms, and tabbed sets. This means that administrators can create modules for a single dataform because the list column data is available in Dataform Admin, even for dataforms with **Can Have Multiple** enabled.

To define the multiform list column headers:

1. Go to **System Admin** ⚙ > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.

2. Select the dataform in question and click **Edit**.
   The Dataform Properties form opens.
3. In the **Action Center**, click **Fields**.
   Dataform fields are presented. The column headers for this list are defined using the field attribute, **Multi Col**.
4. Assign numeric values to the **Multi Col** column for the fields you would like to see displayed in the list in ascending order.
5. **Save** your changes.
6. Use the Column Width setting to designate how wide a field is when displayed in the list view. This helps you to maximize your multiform list real estate.

Configuring your dataform datatypes

The following is a list of the most commonly used datatypes in the application, accompanied by a brief explanation of how they work.

TypeName	Explanation of Datatype
Decimal	Accepts a decimal number with the precision as defined in the mask. If the user enters a number with higher precision (more digits to the right of the decimal point), than the mask allows, the number is rounded to the proper precision.
Field Set	Fieldsets are not data entry fields, and no corresponding SQL Server field is created when a new fieldset data type is created. Fieldsets act as an organization container for other fields. The use of fieldsets typically makes the layout and organization of a data form significantly better.
Image	Attach an image file.
Date	Date. The user can enter a date or select a date by clicking the calendar icon to the right of the field. Only valid dates are accepted as an entry into this field. Codes can be used as a shortcut to populate the date field. Typing “2d” into a date field adds two days to the current date. “-2w” subtracts two weeks from the current date and so on. The valid codes are d=day, w=week, m=month, y=year.

TypeName	Explanation of Datatype
Calendar Event Selector	Select any non-recurring calendar event to which the user account has access and create a link within the dataform to this calendar event.
Integer	Consists of the natural numbers (1, 2, 3), zero (0), and the opposites of the natural numbers (−1, −2, −3). If no minimum or maximum is specified in the field properties, the user can enter a number up to 2.146 billion.
Text	Standard text input field accepts alphanumeric and special characters. Limited to 500 characters unless a smaller number is entered into the max length property.
Time - Standard	Text field formatted to accept standard time (9:40pm).
Link	Text field with hyperlink control attached. **CAUTION**: The hyperlink control always attaches the HTTP protocol before a URL is stored in this field and can result in protocol doubling up.
TextArea	Wide text area. Expands to large note area for editing. Identical to the text entry field but the field spans two columns and 3 rows to accommodate longer text entry.
Time - Military	Text field formatted to accept military time, such as 21:40.
User	Integer. List of all active users in ClientSpace. The primary key of the user record is stored in the integer field.
Text-Wide	Wide text area. Takes two columns on form.
Phone	Text formatted as phone number ### - ### - ####
SSN	Text formatted as a SSN ### - ## - ####
Log	Wide text area . Enables the user to enter standard text in paragraph form. When the entry is saved, the user that entered the text and the date/time of entry is recorded with the entry stored at the top of the field (above all previously entered text).
Project User	List of active users for the workspace the form resides on

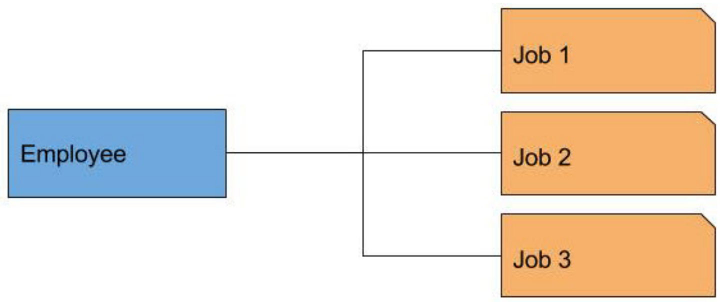
TypeName	Explanation of Datatype
Money	Decimal (14,2). You can enter a value of up to 10 billion dollars. The mask is set by the system to allow for a decimal scale of two with automatic rounding to two places. Minimum/maximum property settings can control the data entry as needed. The input is automatically formatted with dollar signs and decimal scale of two places.
Zip Code	Text. Formatted as a zip code. Zip code fields also can use custom logic to set associated fields on the dataform. For more information, see Configuring the Zip Code datatype.
Parent Form	Integer field contains custom logic to tie it to a parent dataform. For more information see Configuring parent form datatypes.
Checkbox	True/False (bit). Presents the user with a check box (option). Defaults to unchecked (cleared).
Role Selector	Selects a Role from the Role administration.
User Filtered By Role	List of users filtered by associated RoleID entered in the Related Fields area.
Contact Type Ahead	Filters the related Org Category list to narrow the list of Contacts. If this parameter is not set, control returns a complete set of Active Contacts.
Org Type Ahead	Typeahead field that performs autocomplete foreign key to Organization record. **Note**: This can be filtered using the Category field when configuring this datatype.
User Project	A list of the projects the user has access to.
User by Role Type Ahead	Typeahead list of users filtered by role entered in the Related Fields area.
Org Contact	List of contacts for the Org attached to the workspace.
User Type Ahead	Typeahead list of users.
Org Contact (Field Related)	List of contacts for an Org referenced in an Organization field on the dataform.

TypeName	Explanation of Datatype
Project User Type Ahead	Typeahead list of users associated with the workspace in which you are currently working.
Lookup (core)	The list is populated from the specified lookup. See Configuring lookups.
Lookup - Multiple (core)	Text box (500 characters) stores multiple selections as text strings separated by **!.!**. See Configuring lookups.
User Filtered By Entity Type Ahead	Text box. Uses typeahead functionality to select available users filtered by a security entity.
User Multiple Select	Allows for the selection of multiple users from a pop-up.
Email	Text field. Checks for a valid format of the email address.
Phone (No Formatting is Saved)	Text field. Accepts phone numbers but does not save them as formatted.
Report Selector	Provides a list of available reports.
Contact Type Ahead	Text box. Uses typeahead functionality to select available contacts.
Role Selector Type Ahead	Text box. Uses typeahead functionality to select available roles.
Percent	Decimal (14,2). Formatted as a percent.
Calendar Event Selector	Select a calendar event from a list of events attached to the workspace.
Editor	Rich text control. Similar to a text area, but with formatting.
File Upload Manager - Database	Enables file attachment. Files are stored in the database. Multiple instances of the same file are stored as one file with multiple linking records.
Location Sync	Creates a list that contains all the locations for a given workspace. Upon selection from the list, it pre-fills other address fields on the form. **Only works on the Location form**
UserByEntity	List of users filtered by Security Entity (Entity configured in Related Fields property of dataform field).

TypeName	Explanation of Datatype
UserByEntityTypeAhead	Typeahead List of users filtered by Security Entity (Entity configured in Related Fields property of dataform field).

Configuring parent form datatypes

Parent-child relationships between dataforms allow you to build a fully relational structure to your ClientSpace information, knitting dataforms together to create a data structure that mirrors the real world. An example of this in our PEO system is the Employee demographics and related forms. For clients, there are one or more employees, each with a singular record. If the employee moves or gets married, you want to update that record instead of creating a new one.

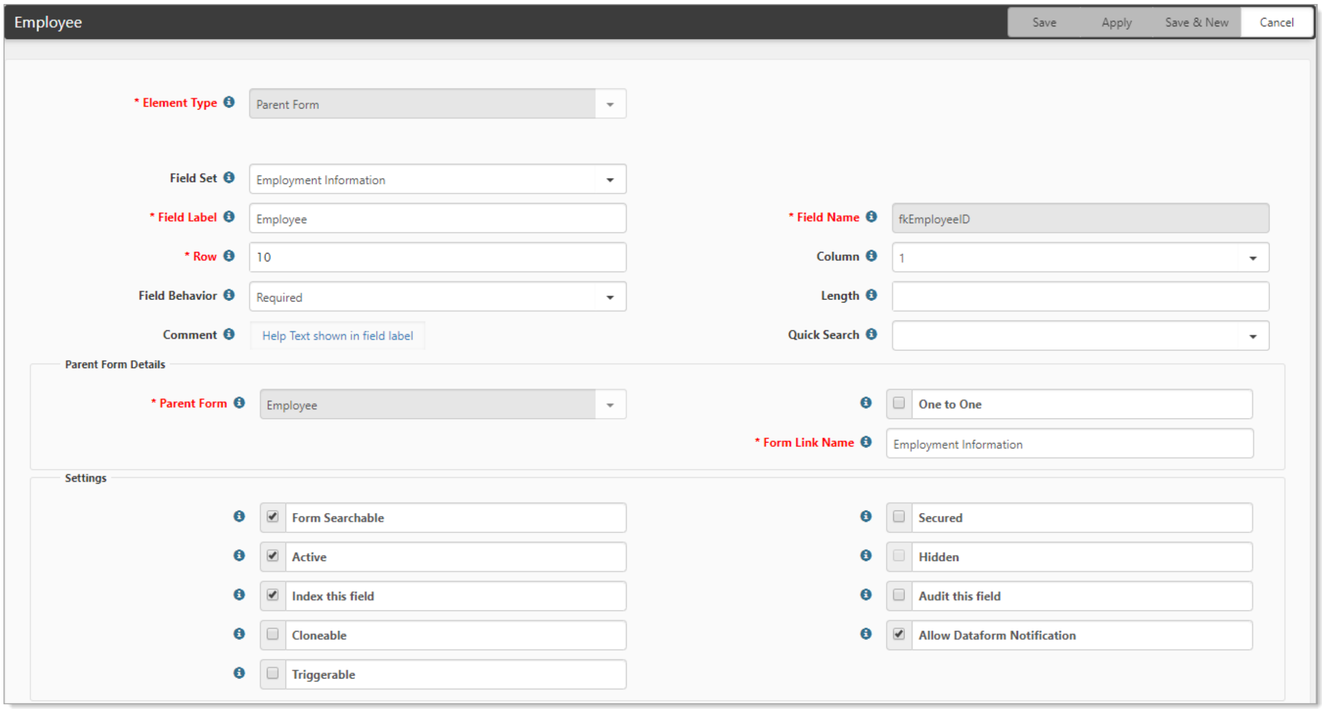


The employee’s employment history, however, is a different story. There are many reasons to historically track employment information. Take for example a theme park that terminates employees at the end of the season, then re-hires them at the beginning of the next season. By historically tracking this employment record, we can view an employee’s history, pay grade changes, and reasons for termination. The person is the same but the job changes.

In database administration, this is known as a One-to-Many relationship: one employee record, with many employment records. To take this a step further, each Employment record has multiple paycheck or voucher records associated with it and each voucher record can have multiple deduction records and so on. The ability to dynamically associate data together in a cohesive structure is one of the most powerful capabilities of the ClientSpace system.

Parent form fields are always added from the Child form. So, in our example, there would be an Employee field on the Employment record, an Employee Employment (Job) field on the Voucher record, and so on. This is important to understand when completing the setup of this relational datatype.

Let's use the Employee field and the following dataform as a guide.



To configure the Employment dataform:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Open **Employment**.
   The Dataform Properties: Employment form opens.
3. In the **Action Center**, open **Fields**.
   The Employment fields list displays.
4. Open **Employee**.
   The Employee dataform opens.

Field	Description
Element Type	Determines the type of data you store in this field. **Parent Form** is the default.
Field Set	A fieldset is a group of fields delineated by a box. You use a fieldset to organize fields.
Field Label	This value displays on the dataform, so **Employee** makes sense.
Field Name	This is the column name for this field as it is stored in the database.

Field	Description
	On these parent form datatype fields, the system stores the ID of the parent form record. This is called a Foreign Key (when joining data tables together in these relationships, the primary ID of the record on another table is the foreign key of that record on the referencing table), so we would use a standard naming convention for this field of **fk** (foreign key) **Employee** (dataform name) ID or **fkEmployeeID**. As a best practice, use camel case for the Field name. Begin with lowercase to indicate datatype (such as **fk** for foreign key or **lu** for lookup). This is a best practice and makes the data easier to understand when you use this information in reports.
Row	Row property determines the vertical ordering of fields and fieldsets. Fields that are within a fieldset are ordered within that fieldset. A best practice is to set this in increments of ten, which allows for re-ordering fields or adding fields between rows without re-ordering the entire form.
Column	Column property is hard-coded to dictate a two-column format.
Field Behavior	• When **ReadOnly** is selected, the field cannot be edited. • When **Required** is selected, the field must be completed before you can save the dataform unless the field is in a hidden fieldset.
Length	The maximum length of the field entry. This property is valid for text and integer data types.
Comment	Comments provide online help for dataform users. When comments are added to any dataform field, the info bubble is enabled and on hover, the info bubble displays the comment text in a pop-up.
Quick Search	Select a value to add the field to the Quick Search on multiform searches: • Starts With • Equals • Contains (% search)
Parent Form	Dataforms can be related to each other in a parent-child relationship using the **Parent Form** data type. When this data type is selected, the related form fields are enabled (**One to One** and **Form Link Name**), allowing you to define the relationship. The Parent Form is selected from the list of all dataforms because the

Field	Description
	relational field is placed on the child form. Recursive relationships where a record is related to another record of the same dataform are supported. For example, a person dataform may be related to itself to represent the mother and father of the person.
One to One	By default, **One to One** is enabled (selected). This means that each parent form can be related to only one child form. One-to-many relationships allow a parent form to relate to many children records. • If **One to One** is enabled (selected), the link to the child form from the parent presents the child form directly. • If **One to One** is cleared (not selected), this means you have a one-to-many relationship. The link to the child form from the parent presents a list of related records giving the user the option to edit an existing related record or add a new related record.
Form Link Name	Employment Information. This is what appears in the form link in the upper left of the Parent dataform.
Form Searchable	When selected, the form is one of the Search parameters in a multiform list.
Secured	When selected, the field is secured and generates a security entity for the field in the format of **gen_TableName_FieldName**.
Active	Determines if the field displays on the dataform. Deactivating a field is preferential to deleting it because deleting the field removes it from the underlying SQL table and erases the data. When you deactivate or hide a field, you retain the data for later use.
Hidden	Determines if the field and its children are hidden when a dataform record is viewed.
Index this field	When selected, the field is added to the SQL table index. **Index this field** makes searches based on this field faster.
Audit this field	Determines if the field is auditable.
Cloneable	Determines if the field is configurable when this dataform is created by Workflow and Email Templates.
Allow Dataform Notification	When selected, this field is included in a dataform notification when dataform subscribers are emailed. Updated fields appear in bold in this

Field	Description
	email.
Triggerable	Determines if this field is available for use as the Triggering Field or as one of the Triggering Conditions when configuring Workflow Channels and Email Templates

The remainder of the setup for this dataform field is open to configuration on your part but notice that fkEmployeeID is a required field on this form. You cannot have an employment record without an attached employee, so the field is required. Careful planning before adding fields to a dataform saves a lot of cleanup of bad data down the road.

Parent form datatype morphing

By default, if there are less than 250 records when a Parent Form datatype presents on the page, it displays as a drop-down list. If there are more than this threshold, the field becomes a type ahead with a search pop-up.

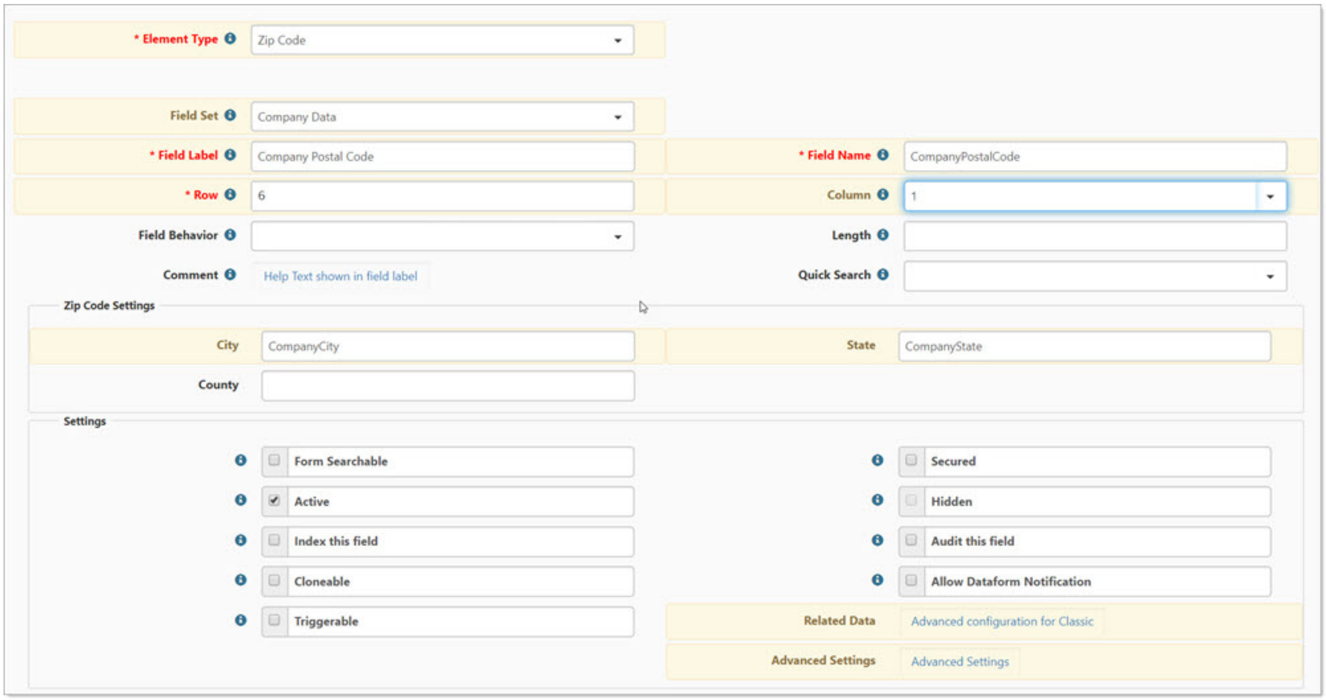
The threshold can be changed in the **Related Fields** section of the field settings using the **ROWCOUNT** command. Records can also be brought in from a different workspace using the Related Fields section as well by adding the partial **GUID** of the workspace.

For example, to have a threshold of 50 records and to bring in records from a workspace with the partial GUID 'ce3d5dee' as well as the current workspace, you would add **ROWCOUNT=50;ce3d5dee;CURRENT** to the Related Fields section.

The ROWCOUNT command can alternatively be used to extend the threshold beyond 250 where the records can be filtered by other means. For example, there are several places in the application such as Client Service Cases where a parent form field is filtered by another field on the dataform. An example of this would be a Client Service heavy environment where you have 275 case types. The case type list on the dataform is filtered by the case category, but the Morphing aspect of the parent form datatype converts the field when the dataform loads, prior to the category filtering. In this instance, you can add the ROWCOUNT=300; switch to the Related Fields property, the control remains a drop-down, but is filtered client side by the Category field. Caution should be exercised when using this option, as too many rows can exceed the length of the standard drop-down list, making selecting from the bottom of the list impossible due the limits on scrolling in these controls

Configuring the Zip Code datatype

The Zip Code datatype is a dynamic control that can be configured to auto-fill related fields on the form. This can be a great time saver, especially when configuring dataforms with multiple address fields. The field is configured using a semi-colon separated list of related fields in the related data field of the field configuration dialog.



To configure a Zip Code datatype on your dataform:

1. Add the zip code field and other related fields such as City, State, and County.
2. In the Zip Code Settings fieldset, complete the fields for City, State, and County. These could be fields such as BillingCity, BillingState, BillingCounty – as long as the field names are correctly spelled and in the appropriate zip code settings fields. In this way, you can use the same zipcode datatype to fill multiple city state and county fields on the same dataform.
3. **Save** your dataform field.

Now when you fill the zipcode field on the dataform and tab out of the field, the associated City, State, and County fields are auto-filled.

Configuring dynamic field display

Configurable field display provides an administrator with vast control over the general look and feel of a dataform. This is much more than just grouping fields into fieldsets or tabs but includes the ability to dynamically enable or disable fields and show or hide fields, fieldsets, or even tabbed dataforms based on the other data on that dataform. In combination with custom header links, an administrator can virtually set up any workflow or process in ClientSpace using dynamic field display.

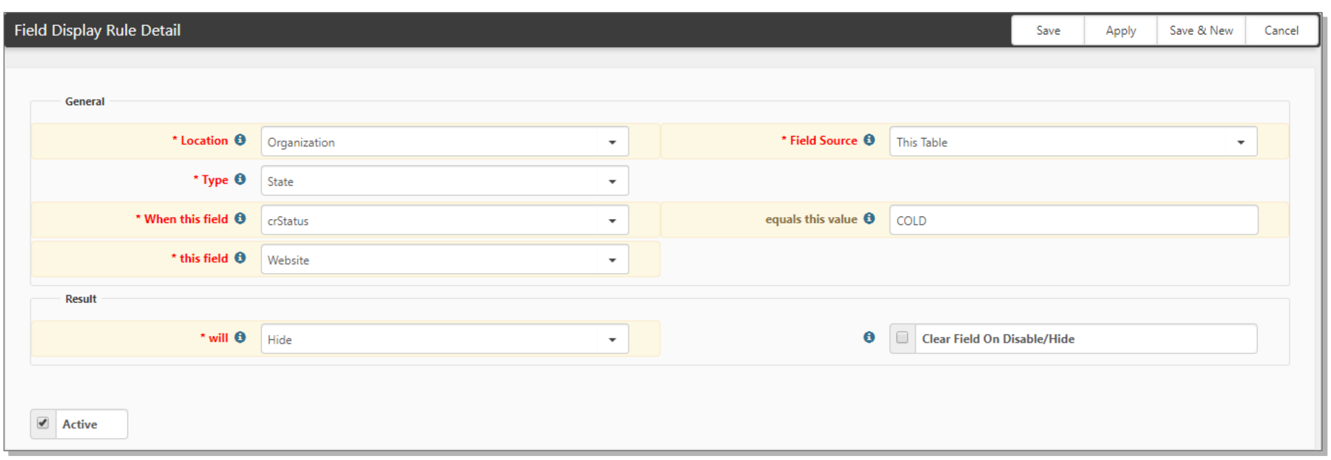
When configuring field display, keep in mind what you would like to accomplish and map out how the result should work on your dataform. For example, when you select Organization as the Location, Organization fields can be made read-only or hidden based on configurable properties just as dataform fields. The source for these properties can be either based on Organization fields (where Field Source is This Table) or other related fields in ClientSpace using a field display proc (Field display Proc 1 or 2).

Field display can be cascaded. Combine this with required field rules, and it allows you to build incredibly complex workflows within a dataform. An example of this could be a form, where filling out a Pay Frequency field with a value of **Weekly** displays a Weekly payroll fieldset containing a required Pay Type field with values of **Check** or **Direct Deposit**. Selecting **Direct Deposit** displays a field for **Bank Authorization**, which is also required to save the form.

Required dataform fields hidden through configurable field display do not present their Required attribute to the system's dataform save logic, meaning these fields are only required if visible. This allows you to structure complex dataform logic and workflow within a dataform. This flexibility should be tempered with planning to ensure that appropriate data is captured when required. In short, make sure you are not hiding a field that should be completed.

To configure and manage dynamic field display:

1. Go to **System Admin** > **Advanced** > **Manage Field Display**.
   The Field Display Rule Search dashboard opens. It is helpful to filter the presented list for the dataform to which you are adding field display. This helps you to understand the existing field display logic and determine if this affects the changes you want to make.
2. When ready, click **Add**.
   The Field Display Rule Detail form opens. This form provides a number of configuration options to customize your field display.



3. Complete the form:

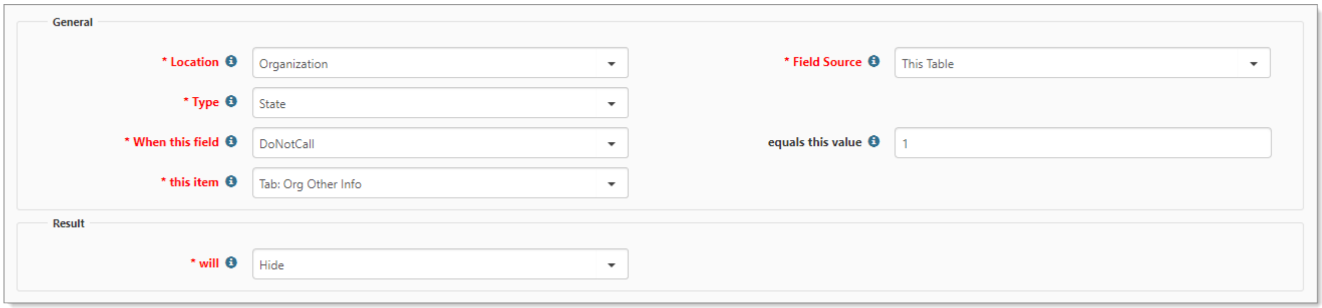
Location	Required. Select the location for which you would like to configure the field display. Many of the items on the list are dataforms. However, some are not, such as Organization. The Location selection affects several other choices on this form.
Field Source	Required. Select one of the following: • **This Table**: Indicates your field source is from the Location field (such as a dataform). • **Field Display Proc 1**: Indicates your field source is from a custom stored procedure. • **Field Display Proc 2**: Indicates your field source is from a custom stored procedure. A Field Display Proc is a custom SQL stored procedure that allows you to aggregate information from other dataforms in the system. For example, this allows you to disable all of the fields on workspace Employee and Employment forms if the Client Status on the Client Master page is Terminated.
Type	Required. Determines whether this is a field display change that affects **State** or **Styling**: • **State**: Field interaction. Visibility / read-only attributes (default). • **Style**: Sets CSS Styling changes to the field label based on a specific triggering condition. ◦ When you select Style, **Settings** becomes available in the Result fieldset. **To set Style:** 1. Click **Settings**. The Settings dialog box opens. 2. Select Font Type, Font Style, and Font Color. 3. Click **Update**.
When this field	Required. Presents a series of fields based on your choice of Location and Field Source. The selection in this field acts as the trigger for your field display action.

equals this value	Required. This is the triggering value and should be set to something appropriate for the triggering field selected in **When this field**. For example, a check box selected as the triggering value should equal either True or 1 to trigger your field display off the checked state. The value of a Lookup trigger field should equal the code value of either one of the lookup options or a comma-separated list of code values. You can also build OR statements using a comma-separated list of values in this field for distinct value fields such as lookups, text, or parent form fields. Lets' say you have a lookup field to store the days of the week. To trigger field display for weekend days using **equals this value** as `Saturday,Sunday` equates to *where value equals Saturday OR Sunday*. Note, there are NO spaces between the values in a comma-separated list.
this item	Required. This is the field, fieldset, or tab upon which to perform the field display.
will	Required. Choose a field display action: • **Enable**: Opens field for edits, allows changes to the field to be saved. • **Disable**: Marks the field or tab as read-only and not editable. • **Hide**: Hides the field or tab from displaying. • **Display**: Shows the field or tab on the dataform.
Clear Field On Disable/Hide	*Clear Field on Disable/Hide* does precisely that. It removes any information previously stored in this field when it is hidden or disabled. This is a hard delete from the system, so exercise careful planning when choosing this option. Hiding a fieldset hides all fields within the fieldset, masking any required field actions for those fields. This option is hidden when a tab is selected in **When this field**.

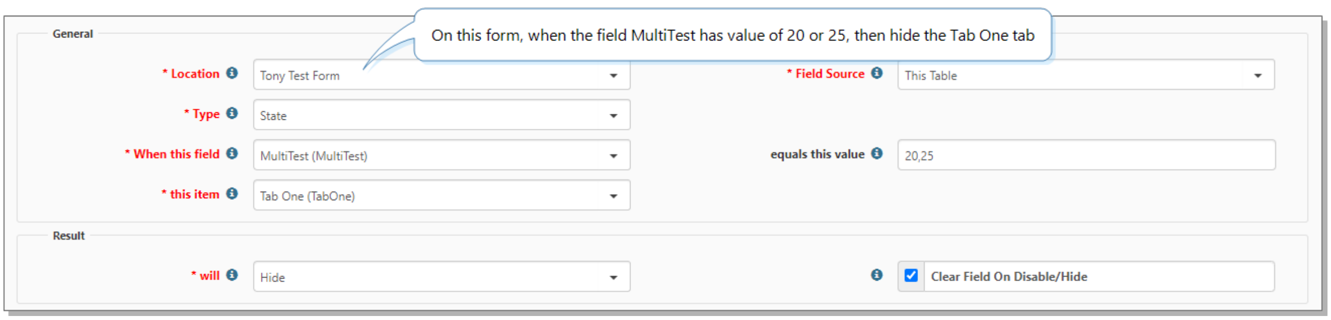
4. After you have configured all the field display options, click **Save**.

Examples

On the Organization, when the field DoNotCall is selected (equals 1), then the tab Org Other Info is hidden.



When the field named MultiTest has a value of 20 or 25, then the tab named Tab One is hidden.



Adding tabbed dataforms to a parent form

This topic provides step-by-step instructions on adding tabs to a dataform. Much of the process involves creating a new dataform. Only the key points of this process are touched on as this is well documented elsewhere. Adding tabs requires access to the dataform pipeline configuration and is only available with Developer rights in the system.

To add tabbed dataforms to a parent form:

1. Create the tabbed dataform(s) in Dataform Administration, ensuring that you include a Parent Form datatype field, configured to point at the Parent form of the tab.
2. In Dataform Administration, search for the Parent Dataform and go to **Form Properties** > **Customization** > **Pipeline(default)** > **Tabs**.
3. Click **Add**.
4. Select the tab dataform from the Dataform list.
5. Set the Display Order (this is the order the tabs appear at the top of the dataform).
6. Click **Save**.

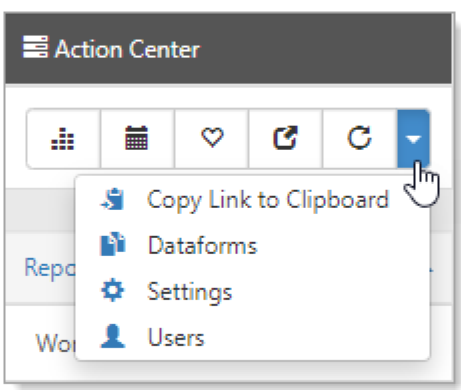
Distributing your dataform: Making dataforms accessible

After a dataform is created and configured, you need to provide some way for it to be used, and this can be accomplished in several ways. A dataform might need to be workspace specific, so you would need to add it to a single workspace, or it may need to be more widespread, so you would want it copied to each workspace as they are generated. You may also want to only expose access to the dataform from the header of another dataform. Certain financial dataforms in the PEO system are exposed through header links from the dataforms for which they contain financial data. This document discusses each of these methods of Dataform Distribution.

Adding a dataform to a workspace

To add a dataform to a workspace:

1. Navigate to the Workspace in question. This can be a single administrative workspace, or you can have the dataform generated on Workspace creation. Go to **System Admin** > **Workspace Templates**.
   The Workspace Template Search dashboard opens.
2. Locate and open the template in question.
3. In the **Action Center** menu, select **Dataforms**.

   The Workspace Dataforms list is displayed.
4. Click **Add**.
   The Add Dataforms dialog opens.

5. Find and select the dataform.
   When adding a dataform, if the entry in the dataform search dialog is disabled, this means the dataform already exists in the workspace.
6. Click **Ok**.

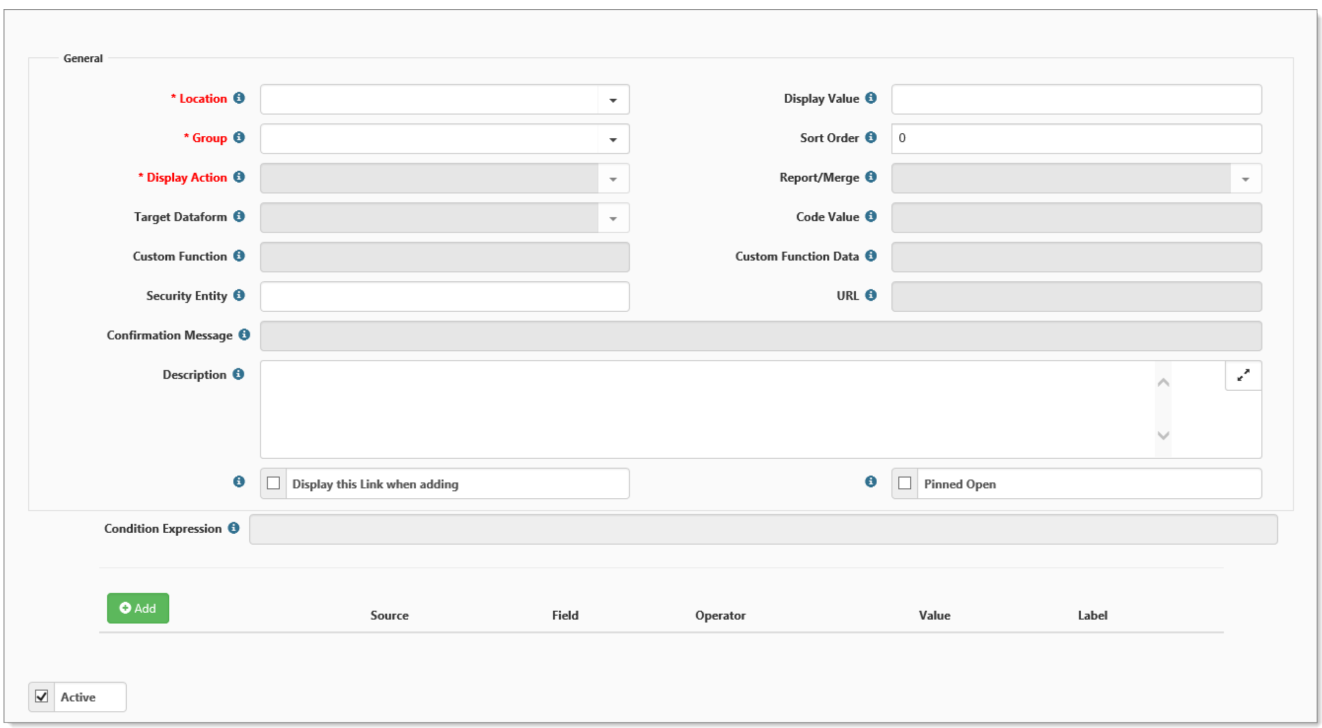
The dataform is added to all child workspaces of that template.

Adding a new link to the dataform

Dataforms can also be accessed from custom links in another dataform header. Configuring a header link is detailed in the topic Configuring links . This topic discusses the link configuration items to create a Workspace Dataform link.

To add a new link to the dataform:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Click **Add**.
   The Configure Links Detail form opens.
3. Use the following field descriptions to guide you through adding a new link.



Location	The name of the dataform on which you want to link to appear.
Group	Where will the link appear in the header?
Display Value	The text that is displayed in the Action Items area as a selectable link.
Display Action	Lists the possible actions for the selected link group. The available actions are based on the selected Group and include items such as running a report or merge. This then creates a HdrAction to fire a business rule or open a system dataform.
Sort Order	When multiple links are displayed in the header, this determines their order within the link group.
Sort/Merge	Select the report or merge to run using the appropriate display action when a Report link is selected.
Target Dataform	The dataform you would like the user to access from this link.
Code Value	This is the HrdAction produced when an Action link is selected.
Custom Function	This is the custom function that is called from an Action link.
Custom Function Data	This is the data that is passed to a custom function if required.
Security Entity	This can be used to hide the link from unauthorized access.
URL	Use this field to configure the URL that opens on a URL Display Action. When defining an external URL, include the protocol (http:// or https://) as links. Without the protocol, the link is treated as internal to the application.
Confirmation Message	Provide a confirmation message that displays an OK / Cancel dialog box before running the link action. This is most often used with Action Links.
Description	A short description of the dataform and how it should be used. This text appears when you point to the link.
Display this Link when adding	This section can be used to set parameters for when the link should display. For a complete discussion of configuring link display see Configuring links .
Pinned Open	When selected, this forces the link to always display in the Action Items area. The link does not collapse when the associated group is collapsed.

Condition Expression	This field uses the Labels from any conditions that you added under Add. You can combine multiple triggers into more complex expressions and override the default OR behavior. Conditions that are not included in this field are ignored.
Active	By default, configured links are active.

4. After configuring the Dataform Link, remember to **Save** your changes.

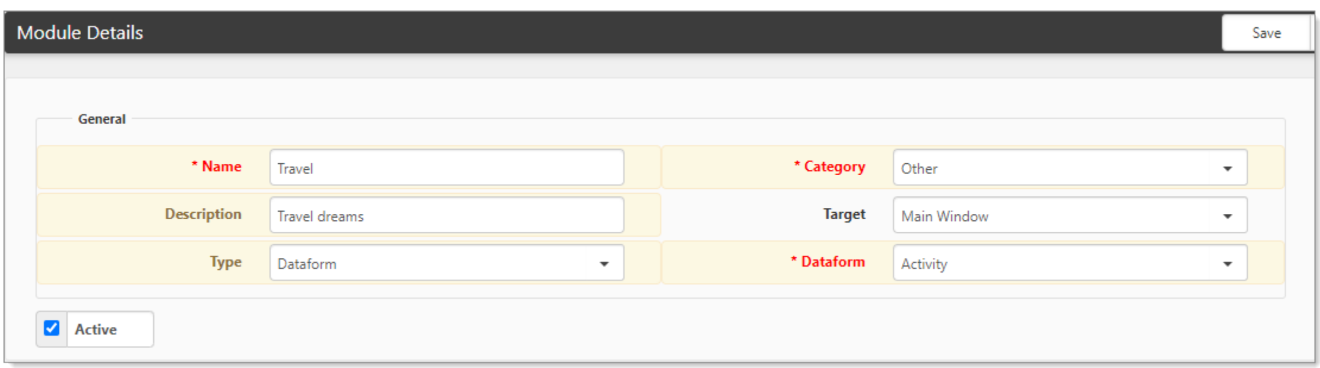
For questions about Admin Dataforms, please log an Extranet case.

Configuring a Dataform to open as a Module

Did you know that you can create a module from a dataform? This allows you to access a single or multi-dataform without having to enter the Workspace first.

To create a module:

1. Go to **System Admin** > **Modules**.
   The Modules dashboard opens.
2. Click **Add**.
   The Module Details form opens.



3. Complete the form:

Name	Enter a name for the new Module.
Category	Select a category for the new Module.
Description	Enter a description.

Target	Select **Main Window**.
Type	Select **Dataform**. The Dataform field becomes available.
Dataform	Select a dataform from the list. These are single dataforms (not tabbed forms).
Active	Select to activate the new module.

4. Click **Save**.

Example of how to use

Let's say that you want to configure a module named Employee Search to display a list of Employees.

To configure:

1. Go to **System Admin** ⚙ > **Modules**.
2. Enter the Name as **Employee Search**.
3. For Category, select **Other**.
4. For Target, select **Main Window**.
5. For Type, select **Dataform**.
6. For Dataform, select **Employee**.
7. Click **Save**.

To view your new module:

1. Go to **System Admin** ⚙ > **Modules**.
   The Modules dashboard opens.
2. In the list, locate your new module, **Employee Search**.
3. To open, click (**Jump**).

The list of employees is displayed with the columns that are configured in the Dataform Admin for the Employee dataform, under Multi Col (see Defining dataform multiform list column headers). Numeric values (not zero) in Multi Col determine the columns that you see in the Employee Search list.

Viewing dataforms and their related items

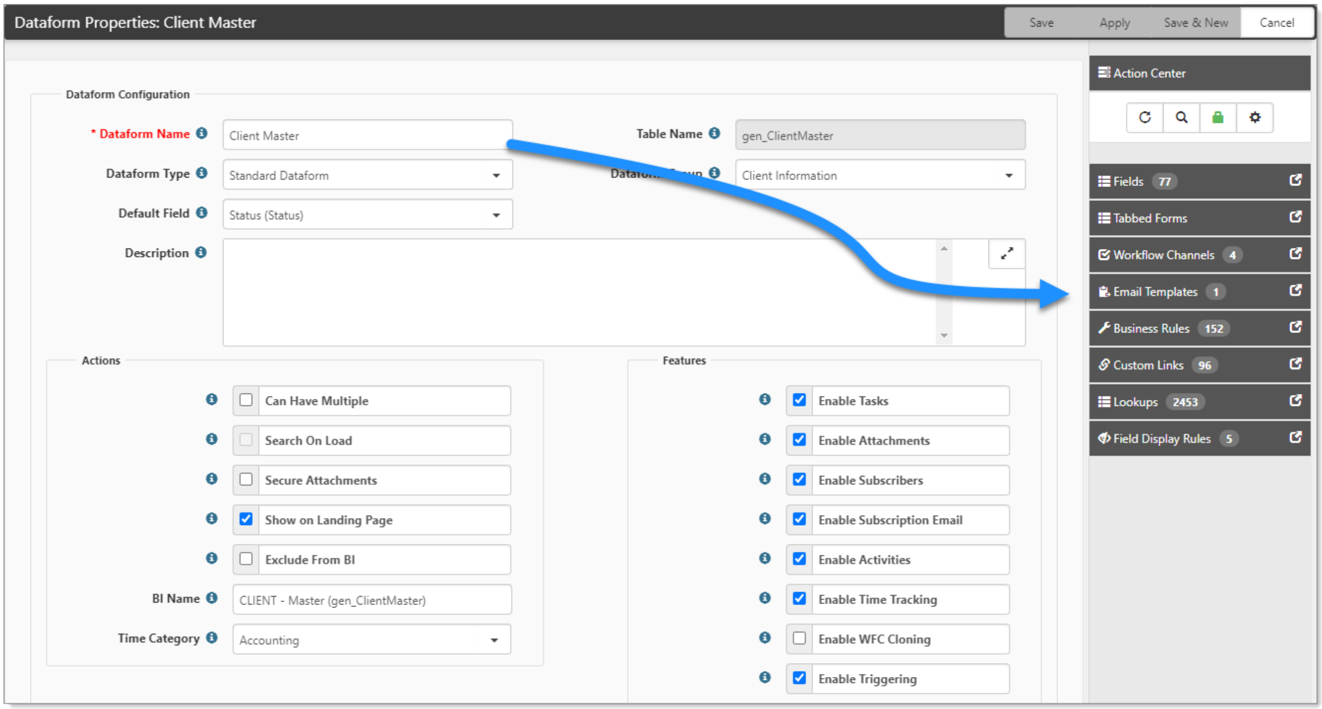
While administering dataforms, you can view dataform fields and related items from the Action Center. This information can help you avoid deleting items that are essential, such as triggers and rules. The following items appear in the Action Center with a badge count to indicate the quantity:

- Workflow Channels
- Email Templates
- Business Rules
- Custom Links
- Lookups
- Field Display Rules

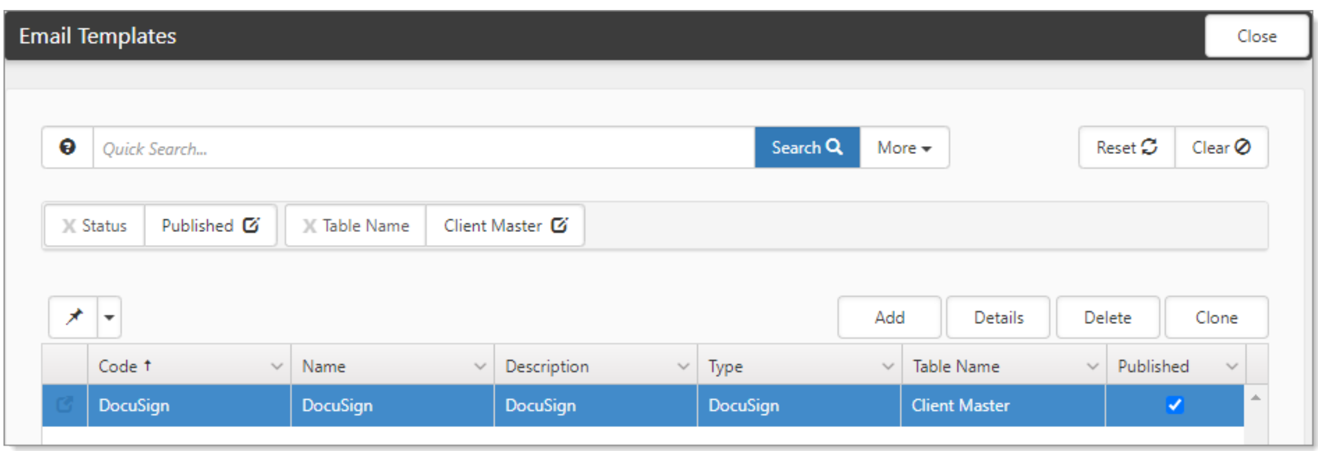
If related items exist, a badge counter indicates the quantity. When you select the item, the corresponding dashboard opens, filtered by the item. For example, when you select Email Templates, the Email Templates dashboard opens for those specifically related templates.

To view the related items:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Select a dataform, such as Client Master (shown in our example).
   The Dataform Properties form opens.



3. In the **Action Center**, select an item with a badge count, such as Email Templates.
4. The dashboard for that item opens, with a filtered list specific to the selected dataform. Our example shows that an Email Template named DocuSign is related to the Client Master dataform.



Learning how: Providing services to your clients through Dataforms

As you may know, dataforms are the backbone of the ClientSpace system. Dataforms store information about the day-to-day operation of providing services to your client. Dataforms can help you work more efficiently and effectively. Dataforms come in two flavors: the single form such as a Client Master or the Client Team form, and the multiform such as a client Location or the Employee form.

Watch the video about Client Services Overview.

Default Server Data Procs

Server Data procs are designed to return data from elsewhere in the system which can then be used for field replacement or trigger conditions.

- When using Server Data Proc data for field replacement, the standard format of the field replacement code is **{SDP#.FieldName}** - with the number indicating the layer to which the server data proc is attached.
- For CORE and PEO server data procs, this would be **SDP1**.
- For Custom Server Data procs this would be **SDP2**. (For example - {SDP1.ClientNumber) would be the ClientNumber field returned from the stored procedure configured in Server Data Proc 1 position of that dataforms default pipeline configuration).

The following worksheets provide the default server data procs that come with the ClientSpace PEO system, the dataforms on which they are configured, a list of the field names returned, and the adjoining dataform fields from which the data is mined. In all cases the replacement precursor was taken from the default configuration of the dataform in our PEO system.

Client Master worksheet

Client Master

Replacement Precursor: SDP1

The server data proc peo_server_data_clientmaster accepts the ProjectID parameter and returns the following Pricing Batch form.

Field	From
BatchOverride	PB.Override
BatchContractType_Decode	PB.ContractType
BatchPricingMethod_Decode	PB.PricingMethod - Decoded
BatchContractType_Code	PB.AdminPercentage - Decoded
BatchPricingMethod_Code	PB.PricingMethod
BatchAdminPercentage	PB.AdminPercentage
BatchPerCheckFee	PB.PerCheckFee
BatchPerHeadFee	PB.PerHeadFee
BatchFirstCheckSupplement	PB.FirstCheckSupplement

Client Service Case

Replacement Precursor: SDP1

The server data proc peo_server_data_clientmaster accepts the ProjectID parameter and fkEmployeeID from the case form returns the following Client Master and Employment forms.

Field	From
WorkflowGroup	CM.WorkflowGroup
ClientNumber	CM.ClientNumber
ClientStatus	CM.Status
ContractType	CM.ContractType
PayFrequency	CM.PayFrequency
LegalEntity	CM.LegalEntityName - decoded
ProcessingCenter	CM.ProcessingCenter
SalesRegion	CM.SalesRegion
EmploymentStatus	Employment - Status for employee attached to case

Field	From
SutaState	Employment - SUTA State for employee attached to case
EmploymentType	Employment - Type for employee attached to the case
JobCode	Employment - Job Code for employee attached to case
CompCode	Employment - Comp Code for employee attached to case

Project Milestone

Replacement Precursor: SDP1

The server data proc peo_server_data_clientmaster accepts the ProjectID parameter and returns the following info primarily from the Client Master and Payroll Information forms.

Field	From
Status	CM.Status
ClientNumber	CM.ClientNumber
ContractType	CM.ContractType
PayPeriodBegin	PINFO.PayPeriodBegin
PayPeriodEnd	PINFO.PayPeriodEnd
FirstCheckDate	PINFO.FirstCheckDate
DBA	Org.DBA
ImplementationSpecialistID	CT.ImplementationSpecialist - ID
ImplementationSpecialist	CT.ImplementationSpecialist - Name

Client Service Case worksheet

Replacement Precursor: SDP1

The server data proc peo_server_data_clientmaster accepts the ProjectID parameter and fkEmployeeID from the case form returns the following Client Master and Employment forms.

Field	From
WorkflowGroup	CM.WorkflowGroup
ClientNumber	CM.ClientNumber
ClientStatus	CM.Status
ContractType	CM.ContractType
PayFrequency	CM.PayFrequency
LegalEntity	CM.LegalEntityName - decoded
ProcessingCenter	CM.ProcessingCenter
SalesRegion	CM.SalesRegion
EmploymentStatus	Employment - Status for employee attached to case
SutaState	Employment - SUTA State for employee attached to case
EmploymentType	Employment - Type for employee attached to the case
JobCode	Employment - Job Code for employee attached to case
CompCode	Employment - Comp Code for employee attached to case

Project Milestone worksheet

Replacement Precursor: SDP1

The server data proc peo_server_data_clientmaster accepts the ProjectID parameter and returns the following info primarily from the Client Master and Payroll Information forms.

Field	From
Status	CM.Status
ClientNumber	CM.ClientNumber
ContractType	CM.ContractType
PayPeriodBegin	PINFO.PayPeriodBegin
PayPeriodEnd	PINFO.PayPeriodEnd
FirstCheckDate	PINFO.FirstCheckDate

Field	From
DBA	Org.DBA
ImplementationSpecialistID	CT.ImplementationSpecialist - ID
ImplementationSpecialist	CT.ImplementationSpecialist - Name

Chapter 5

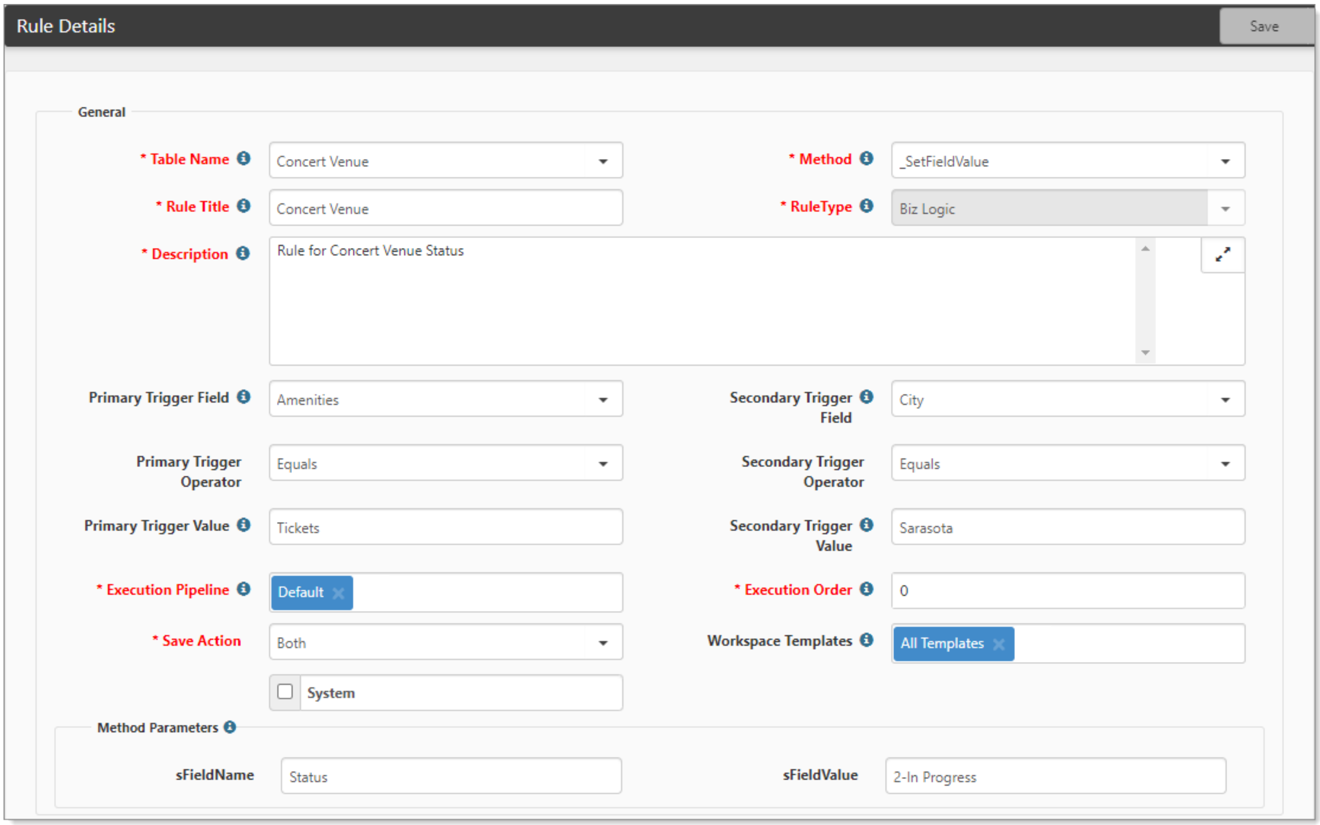
Configuring rules and business logic

Dataform rules can trigger events, ensure that data does not become corrupt (no duplicate SSN and FEIN), and manage the requirements of a workflow, along with any number of custom functions.

You can configure rules to auto-populate another field when a value is selected. For example, let’s say that you select a Primary trigger field and a Secondary trigger field. If the values match, you can set a destination value. You have choices for operator and trigger value datatypes. For example, you can create a rule when you want to set the Implementation Specialist to X when the Payroll Specialist is Y.

To configure a rule:

1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. To add a business rule, click **Add**.
   The Rule Details form opens.



3. Complete the form using the following guidelines.

Table Name	This is the dataform where this rule will execute when the dataform is saved.
Method	Select a method. Is this rule for a field, calendar event, a date value, etc? Our example shows _SetFieldValue.
Rule Title	Provide an abbreviated explanation of what this rule does, for example, "Set Implementation Specialist for Green Team".
Rule Type	ClientSpace controls this field automatically. Rule Type is determined by the Method.
Description	Provide a more thorough explanation of what this rule is to accomplish.
Primary Trigger Field	Select the field that is going to cause the change. This field is a lookup of all the fields on the form.

Secondary Trigger Field	Select an additional trigger condition that must be met if necessary. This field is a lookup of all the fields on the form.
Primary Trigger Operator Secondary Trigger Operator	Select the operator datatype. The following operators apply to their respective datatypes: • Contains: Text • Does Not Equal: Text, Integer, Date, Lookup, User, Parent • Empty: Text, Integer, Date, Lookup, User, Parent • Equals: Text, Integer, Date, Lookup, User, Parent, XML • Greater Than: Text, Integer, Date, User • Greater Than or Equal: Text, Integer, Date, User • Is Dirty: Text, Integer, Date, Lookup, User, Parent • Less Than: Text, Integer, Date, User • Less Than or Equal: Text, Integer, Date, User • Not Empty: Text, Integer, Date, Lookup, User, Parent • Starts With: Text • Org, Contact, and some other special fields present as an integer and share those operators
Primary Trigger Value Secondary Trigger Value	Type a value to be met as a triggering condition. The following list is the standard behavior of the value field based on datatype: • Text: Shows a text field. • Integer: Shows an integer field. • Checkbox: • Date: Shows an integer field. You can use date settings for today (t), 1 day (1d), 1 week (1w), etc. • Lookup: Provides a drop-down field with the corresponding lookup values prefilled. • User field: Displays a list of all users. • Contact/org typeaheads: Integer. • XML: A sub-selector with the associated lookup and integer. • Parent field: Brings back decoded data. • Project User: Integer.

	Other valid values include: • #IsDirtyAndIsEmpty: Executes if the Trigger Field on this form has changed and is now empty. • #IsDiryAndNotEmpty: Executes if the Trigger Field on this form has changed and now contains a value.
Execution Pipeline	Leave this set to **Default**.
Execution Order	This field controls the order in which rules will execute. Rules execute from the lowest to the highest number. It may be necessary to look at other rules already configured on this dataform to determine the order of precedence for executing rules. **Execution Order of Precedence**: Within the Rules system, there is a distinct order of precedence that occurs, that being HardError, SoftError, BizLogic. This means that setting a field to a specific value automatically with BizLogic, then validating that field with a Hard Error will never occur in the correct order, as the Hard Error will fire before the BizLogic fills the field. This order of precedence happens irrespective of the execution order placed on the configured rule, so Hard Errors will fire in Execution Order least to greatest, then Soft Errors will fire in their order of execution, then the Biz Logic will happen, again in the order of execution set on each rule.
Save Action	Will this rule be applied on Insert of a new dataform, the Update of an existing dataform, or on Both?
Workspace Templates	Select the templates under which this rule will run.
System	
Method Parameters	Method Parameters are dependent on the selected rule method for this rule. Hover over the info bubble for more parameter information or submit an Extranet case with your questions.
Workspace Template	Select the Workspace Template to which this rule applies.

4. Click **Save**, **Apply**, or **Save & New**.
   Save & New clones the selected dataform from the previous rule, making it easier to add

multiple rules to the same dataform.

> To find the technical database names and the values stored in the database representing the value on the dataform, use a combination of Ad-hoc Reports, the Dataform Specifications Report, Lookup Admin, or Dataform Admin.

If you need further help with configuring custom rules in your system, please log a case in the Extranet.

Business Rule Methods

This topic provides a list of methods, a description of the method, and the accompanying parameters.

Dataform rules include Biz Logic, Hard Errors, and Soft Errors. These rules can trigger events, ensure that data does not become corrupt (for example, no duplicate SSN and FEIN), and manage the requirements of a workflow, along with any number of custom functions.

- Business Logic Rules compare fields, perform calculations, change values of fields, validate values, and more
- Hard Errors (HE) are hard and fast requirements that must be met before the action can be completed. These are most commonly used to require data be entered before a certain step in the process but without making it a hard requirement to save the current dataform.
- Soft Errors (SE) are used as reminders and warnings. These can be configured as custom and complex warnings, or they can be simple warnings to remind someone to complete a specific field.

For details about adding a business rule, see Configuring rules and business logic.

Clear Field rules

You can automatically clear a field based on a specific trigger condition.

Method	Description	Parameters
_ClearFieldValue	Clears the value in a specific field on save.	• **sFieldName** (field to be set) • **sFieldValue** (value to be entered in the field)
_ClearTabFieldValue	Clears a field on the sTabTableName dataform on save.	• **sTabTableName** (Dataform Table of Tabbed Dataform) • **sFieldName** (field to be set

Create Field rules

Method	Description	Parameters
_CreateCalendarEvent		• FieldName • Subject • Invitees • StartTime • EndTime • MeetingType
_CreateExportTransaction		• ExportConfigGUID
_CreateExportTransactionAndData		• ExportConfigGUID
_CreateExportTransactionAndDataByUser		• ExportUser • ExportConfigProc

Required Field rules

The Required Field business rules enable a dataform field to be completed under certain circumstances.

Method	Description	Parameters
_RequireFieldOnThisForm	Checks for a value in a field on the current form.	• sFieldName
_RequireTabField	Checks for a value in a field on a related tab.	• sTabTableName • sFieldName
_RequireAdHocField	Checks for a value in a field that resides in a node that is embedded in the dataform XML packet. For example, there could be an Org node (on the PEO Client Master), and you want to require the Source field. In that case, the parameters would be: • sFieldPath: Org/crSource • sFieldLabel: Source	• sFieldPath • sFieldLabel

Prevent duplicate records

By default, these rules validate other active dataforms of the same type within the same workspace. You can configure the rules with an All Workspaces flag, which allows the rule to validate across all workspaces with the dataform. Similarly, an Include Inactive flag allows the rule to include inactive records both within a workspace and across workspaces.

Method	Description	Parameters
_HE_PreventDuplicateRecords	Hard Error that validates a unique dataform record based on a configured Field Name parameter (such as ImportID). Default behavior validates active dataforms within the same workspace. The default error message for this rule states, "This form cannot be saved because the value for '<fieldName>' is not unique."	• **FieldName** (text): The field which the rule will validate for duplicate records. • **AllWorkspaces** (checkbox): When selected, the rule validates the current record against all dataforms of its type across all workspaces, overriding the default same workspace behavior. • **IncludeInactiveRecords** (checkbox): When selected, the rule validation includes Inactive records, overriding the default active only behavior.

Method	Description	Parameters
_SE_PreventDuplicateRecords	Soft Error that validates a unique dataform record based on a configured Field Name parameter (such as ImportID). Default behavior validates active dataforms within the same workspace. The default error message for this rule states, "The value for <fieldName> is not unique to the system, are you sure you want to proceed?"	• **FieldName** (text): The field which the rule will validate for duplicate records. • **AllWorskspaces** (checkbox): When selected, the rule validates the current record against all dataforms of its type across all workspaces, overriding the default same workspace behavior. • **IncludeInactiveRecords** (checkbox): When selected, the rule validation includes Inactive records, overriding the default active only behavior.

Core rules

In addition to the standard required field rules, two CORE rules allow for multiple trigger conditions when requiring fields. Both rules add an additional Trigger field and Trigger value in the parameter area of HE/SE_RequiredFieldEngine rule. Essentially this allows you to have multiple triggers for a required field rule.

Method	Description	Parameters

_SE_RequireFieldOnFormOnTrigger
_HE_RequireFieldOnFormOnTrigger
	Soft Error
	Hard Error
		• TriggerTable: must be **gen_x** or **#ThisForm**.
		  • **#ThisForm** uses live data from the current form PRIOR to the save.
		  • **gen_x** evaluates the TriggerField value in the database to determine if TriggerField = TriggerValue
		• TriggerField: must be a valid field on **Trigger Table**.
		• TriggerValue: must be a value or **#IsEmpty**.
		• RequiredTable: must be **gen_x** or **#ThisForm**.
		  • **#ThisForm** uses live data from the current form PRIOR to the save.
		  • **gen_x** evaluate the RequiredField value in the database to determine if RequiredField is populated.
		• RequiredField: must be a valid field on **RequiredTable**.

_HE_RequireFileDescription	Hard Error	Requires a document uploaded to a field that has a description before saving
_HE_RequireFileCategory	Hard Error	Requires a document uploaded to a field that has a category before saving
_HE_LimitFileUploadTypes	Hard Error	Limits the file types that can be saved into a field.

Set Field rules

Sometimes you want to automatically set a field value based on a set of triggering parameters; for this reason, the **_SetField** rules were created.

The **_SetField** rules provide several non-specific trigger values:

- #IsEmpty: fires the rule if the trigger field on the Triggering Form has no value

- #IsNotEmpty: fires the rule if the trigger field on the Triggering Form has some value - anything but empty
- #IsDirty: fires the rule if the trigger field on the Triggering Form has any value other than empty and has been changed prior to save
- #IsDirtyAndIsEmpty: fires the rule if the trigger field on the Triggering Form has had its value cleared prior to save
- #IsDirtyAndNotEmpty: fires the rule if the trigger field on the Triggering Form has some value - anything but empty and has been changed prior to save

These options and descriptions are in the contextual help (click the field label). The Trigger Values of this help are selectable links that fill the trigger field automatically.

Method	Description	Parameters

_SetDateFieldValue	Sets a Date field on the TableName dataform.	• **sFieldName** (field to be set)
		• **sFieldValue** (value to be entered in the field accepts datetime shortcuts (t,d,w,m,y), such as:
		  • t (today),
		  • 1w (+1 week)

_ SetDateFieldValueFromSourceField		• **TargetField** (field on form to be set) • **SourceField** (field on SourceForm to be inserted) • **SourceForm** (Dataform providing inserted value) • **OffsetInterval**

Method	Description	Parameters
_SetFieldFromKey	The Field Name of the field (on the Dataform Name dataform) into which the Record ID is inserted if the field is empty. Sets a Text or Integer field to that form's ID. If the field is already filled out, it does not replace the value.	• **TargetField**: The TargetField must be either a Text or Integer Input datatype. Can be used on new or existing records.
_SetFieldFromForm***	Sets a field on the TableName dataform from a field on another dataform. Sets a field on the current single dataform from a field on a different single dataform. Must be in the same workspace. The data types must match. For configuration purposes, TableName is the current (target) dataform. This is to be configured for single dataforms only. Leaving the TriggerField and TriggerValue blank when configuring this rule sets the value on save of trigger dataform. If improperly configured using multi-forms, the data is set from the most recently created form, even if it is inactivated. *****Can only be used on gen_ dataforms that are not Multiforms.**	• **TargetField**: field on form to be set • **SourceField**: field on SourceForm to be inserted • **SourceForm**: Dataform providing inserted value • **AllowEmptyValue**: Clears the target field if SourceField is empty. When unchecked, the target field remains unchanged.

Method	Description	Parameters
_SetFieldOnFormFromForm***	Sets a field on another dataform (gen_DataformName) from a field on the current dataform (#ThisForm) or from another dataform (gen_ DataFormName). Sets a field on a single dataform from a different single dataform in the same workspace. This is triggered by a third, completely different single dataform in the same workspace. The source and target data types must be the same. This is to be configured for single dataforms only. Leaving the TriggerField and TriggerValue blank when configuring this rule sets the value on save of trigger dataform. If improperly configured, when the source dataform is a multi-form, the data is set from the most recent source multiform, even if it is inactive. If the target dataform is a multiform, the data is set on the most recent multiform, even if it is inactive. ***Can only be used on gen_ dataforms that are not Multiforms.**	• **TargetField** (field on the form to be set) • **SourceField** (field on SourceForm to be inserted) • **TargetForm** • **SourceForm** (Dataform providing inserted value)
_SetFieldValue	Sets a field on the TableName dataform on save	• **sFieldName** (field to be set) • **sFieldValue** (value to be entered in the field)

Method	Description	Parameters
_SetFieldValueFromPattern	This rule has the ability to extract the first instance of a value from within a text field using a valid .Net RegEx pattern and set the value of another text field on the same page to this extracted value. Some .Net regex patterns found online begin with the ^ character, which must be removed when configuring this rule. This business rule operates based on the following: The SourceField value is always be treated as textTargetField must be a Text data typeTargetField is ALWAYS overwritten with the results of the pattern matchSourceField and TargetField must be on the current dataform and cannot be used on tabbed forms. If the pattern match returns no value, the TargetField is cleared.	• **TargetField**: Text datatype • **SourceField**: text • **Pattern**
_SetImportID		
_SetTabDateFieldValue	Sets a Date field on the sTabTableName dataform (Tab dataform associated with the triggering dataform)	• **sTabTableName** (Dataform Table of Tabbed Dataform) • **sFieldName** (field to be set) • **sFieldValue** (value to be entered in the field accepts datetime shortcuts (t,d,w,m,y) such as t (today), 1w (+1 week) etc.

Method	Description	Parameters
_SetTabFieldValue	Sets a field on the sTabTableName dataform on save.	• **sTabTableName** (Dataform Table of Tabbed Dataform) • **sFieldName** (field to be set) • **sFieldValue** (value to be entered in the field).

_SetTabUserField	Sets a user field on the dataform tab that is a from a user field on the parent dataform of the tab. This only works from the Parent form to the Child form.	• **TabTableName** (Dataform Table of Tabbed Dataform)
		• **TargetField** (field to be set)
		• **SourceField**
		  ◦ Use #CurrentUser to set the target user field to the current logged in user.
		  ◦ Use #LoginID (with LoginID replaced by a specific user login ID) to automatically set the target user field to a specific user.)

Method	Description	Parameters

_SetUserField	Sets a user field on the same dataform.	• **TargetField**: If a non-user field is selected as the TargetField, such as a text field, the importID will be set in the TargetField.
		• **SourceField**:
		  ◦ Use #CurrentUser to set the target user field to the current logged in user.
		  ◦ Use #LoginID (with LoginID replaced by a specific user login ID) to automatically set the target user field to a specific user. Leaving the TriggerField and TriggerValue blank when configuring this rule sets the value on save of trigger dataform.

Complete all non-archived tasks

You can create a rule that will close all associated tasks on a dataform regardless of the origin of the task so that you do not have to close tasks manually.

Method	Description
_TaskAutoCompleteAll	When you create the rule, use the method **_TaskAutoCompleteAll**. This method completes all non-archived tasks that are associated with a dataform except for tasks that define a recurring rule.

Primary and Secondary Trigger fields

When configuring business rules, the Primary Trigger Field and Secondary Trigger Field lists include fields that are User datatypes. Trigger value fields are text fields that support the following configurations:

- A single User ID
- #IsDirty
- #IsEmpty
- #IsDirtyAndEmpty
- #IsDirtyAndNotEmpty

Primary Trigger

- Primary Trigger Field: can specify **HdrAction** or a field on the current dataform
- Primary Trigger Value: the **HdrAction** value or the field value used for comparison
- Compares Primary Trigger Field **HdrAction** value or the dataform field value with Primary Trigger Value entered
- The Primary Trigger Value **must have changed** for the rule to fire, based on the following criteria:
  - If comparing HdrAction value, the HdrAction is assumed changed
  - If comparing dataform field values (e.g., luState=MA), the dataform field must have changed
  - If #IsEmpty, #IsNotEmpty, dataform field is assumed changed
  - If #IsDirty, #IsDirtyAndIsEmpty, #IsDirtyAndNotEmpty, dataform field must have changed
- Click the label for a list of # conditions that are hyperlinked to set the condition in Primary Trigger Value.

Secondary Trigger

Secondary trigger field and value fields are enabled when a primary trigger condition has been set and are **optional**. Criteria for secondary trigger conditions are as follows:

- Primary Trigger condition **must** be met. Secondary Trigger acts as an AND with Primary Trigger.
- Secondary Trigger Field: can specify **HdrAction**, a field on the current dataform, or a field from ServerDataProc1 or ServerDataProc2
- Secondary Trigger Field: when using Server Data Procs, the format is SDP1.FieldName or SDP2.FieldName
- Secondary Trigger Value: the **HdrAction** value or the dataform/SPD1/SPD2 field value
- Compares Secondary Trigger Field HdrAction value or the dataform/ServerDataformProc field value with Secondary Trigger Value entered
- The Primary Trigger Value **must have changed** for the rule to fire, based on the following criteria:
  - If comparing **HdrAction** value, the **HdrAction** is assumed changed
  - If comparing SDP1/SDP2 value, the current value is assumed changed
  - If comparing dataform field values (e.g., luState=MA), the current dataform field must have changed
  - If #IsEmpty, #IsNotEmpty, current dataform/SPD1/SPD2 field is assumed changed
  - If #IsDirty, #IsDirtyAndIsEmpty, #IsDirtyAndNotEmpty, dataform field must have changed
  - If #IsDirty, #IsDirtyAndIsEmpty, #IsDirtyAndNotEmpty, previous value is assumed Empty, field must have changed (contains a value)
- Click the label to for a list of # conditions that are hyperlinked to set the condition in Secondary Trigger Value.

Required field business rules

Often you want to require a dataform field to be completed, but only under certain conditions. Making the field required at the dataform level is not a good solution. That's where the required field business rules come into play. Required field business rule names are prepended with an underscore (_) and the word **Require**.

Fields with required field business rules: Fields with a _Require rule, such as _ **RequireFieldOnThisForm**, that are in hidden fieldsets, are required when completing a dataform.

The following list comprises the required field rules.

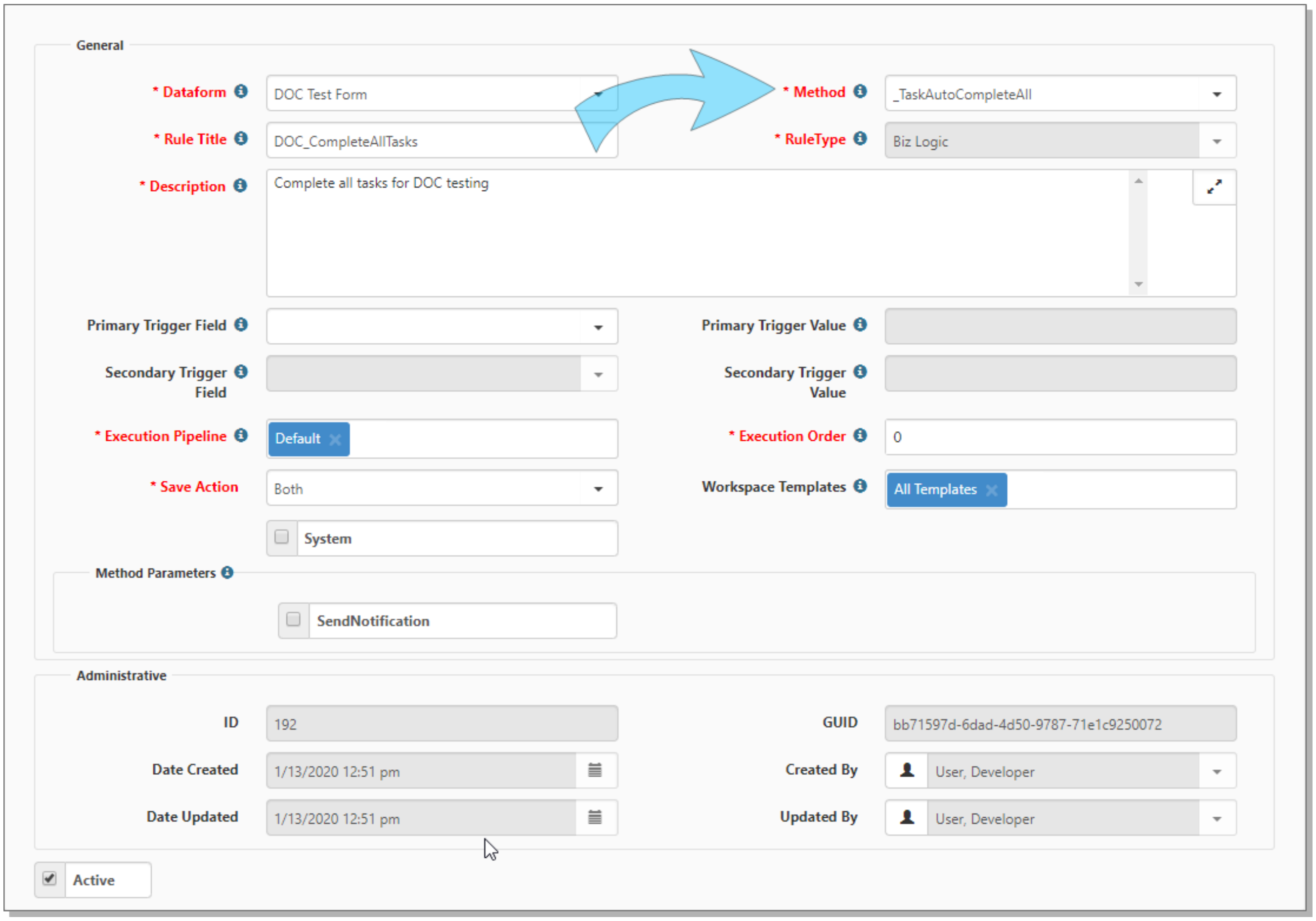
Rule	Description
_RequireFieldOnThisForm	Checks for a value in a field on the current form. Parameter: **sFieldName**
_RequireTabField	Checks for a value in a field on a related tab. Parameters: **sTabTableName** and **sFieldName**
_RequireAdHocField	Checks for a field value that resides in a node embedded in the dataform XML packet. Parameters: **sFieldPath** and **sFieldLabel**

Configuring rules to auto-complete tasks

You can create a rule that will close all associated tasks on a dataform regardless of the origin of the task (Workflow Channel or manual). This means you do not have to close tasks manually. Our example dataform (in the following image) uses the method **_TaskAutoCompleteAll**. This method completes all non-archived tasks that are associated with a dataform except for tasks that define a recurring rule.

To configure an auto-complete rule:

1. Go to **System Admin** ⚙ > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. To add a business rule, click **Add**.
   The Rule Details form opens.



3. Complete the form fields:

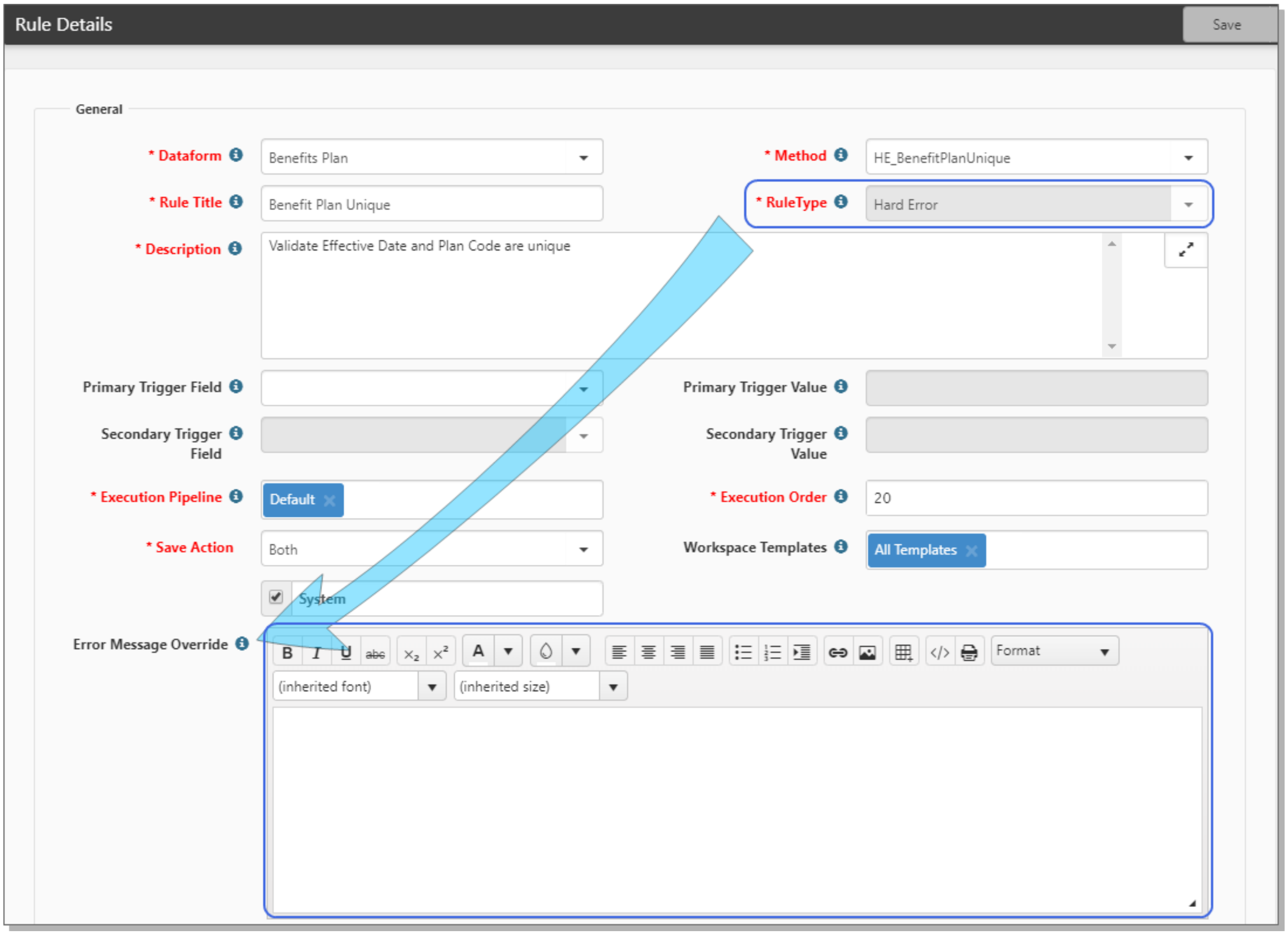
Dataform	This is the dataform where this rule will execute when the dataform is saved.
Method	Select **_TaskAutoCompleteAll**.
Rule Title	Provide an abbreviated explanation of what this rule does.
Rule Type	ClientSpace controls this field automatically. When you select the method **_TaskAutoCompleteAll**, the Rule Type is set to Biz Logic.
Description	Provide a more thorough explanation of what this rule is to accomplish.
Primary Trigger Field	Select the field that auto-completes the task.
Primary Trigger Value	Type the value of what is stored in the database for the Trigger Field.

Secondary Trigger Field	Select an additional trigger condition that must be met if necessary.
Secondary Trigger Value	Set the secondary trigger value.
Execution Pipeline	Leave this set to **Default**.
Execution Order	This field controls the order in which rules will execute first. Rules execute from lowest to the highest number. It may be necessary to look at other rules already configured on this dataform to determine the order of precedence for executing rules. **Execution Order of Precedence**: Within the Rules system, there is a distinct order of precedence that occurs, that being HardError, SoftError, BizLogic. This means that setting a field to a specific value automatically with BizLogic, then validating that field with a Hard Error will never occur in the correct order, as the Hard Error will fire before the BizLogic fills the field. This order of precedence happens irrespective of the execution order placed on the configured rule, so Hard Errors will fire in Execution order least to greatest, then Soft Errors will fire in their order of execution, then the Biz Logic will happen, again in the order of execution set on each rule.
Save Action	Will this rule be applied on Insert of a new dataform, or the update of an existing dataform or on both?
Workspace Template	Select the Workspace Template(s) to which this rule applies.
SendNotification	When the method **_TaskAutoCompleteAll** is selected, then the SendNotification option is enabled. Select this option to send notifications when all tasks are auto-completed.

4. To activate the rule, select **Active**. Active is enabled by default.
5. Click **Save**.

Configuring rules to generate custom messages

System administrators can configure rules to produce custom messages for fields that only display for Hard and Soft errors.



When rules trigger, if a custom error is configured, the custom error is displayed. If no custom error is configured, the standard system message is displayed.

To configure a rule to generate custom messages:

1. Go to **System Admin** ⚙ > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. To add a business rule, click **Add**. To edit an existing rule, click **Edit**.
   The Rule Details form opens.
3. Complete the form:

Dataform	This is the dataform where this rule will execute when the dataform is saved.
Method	Choose from the list. For a list of Methods, see Business Rule

	Methods.
Rule Title	Provide an abbreviated explanation of what this rule does.
Rule Type	ClientSpace controls this field automatically. Rule Type is determined by the Method. To customize messages, the Rule Type must be Hard Error or Soft Error.
Description	Provide a more thorough explanation of what this rule is to accomplish.
Primary Trigger Field	Select the field that is going to cause the change.
Primary Trigger Value	Type the value of what is stored in the database for the Trigger Field.
Secondary Trigger Field	Select an additional trigger condition that must be met, if necessary.
Secondary Trigger Value	Set the secondary trigger value.
Execution Pipeline	Leave this set to **Default**.
Execution Order	This field controls the order in which rules execute. Rules execute from the lowest to the highest number. It may be necessary to look at other rules already configured on this dataform to determine the order of precedence for executing rules. **Execution Order of Precedence**: Within the Rules system, there is a distinct order of precedence that occurs, that being HardError, SoftError, and BizLogic. This means that setting a field to a specific value automatically with BizLogic, then validating that field with a Hard Error will never occur in the correct order, as the Hard Error fires before the BizLogic fills the field. This order of precedence happens irrespective of the execution order placed on the configured rule: 1. Hard Errors fire in execution order least to greatest. 2. Soft Errors fire in their order of execution. 3. Biz Logic fires in the order of execution set on each rule.
Save Action	Will this rule be applied on Insert of a new dataform, or the update of an existing dataform, or on both?
Workspace Template	Select the Workspace Template to which this rule applies.
Error Message Override	Type your custom message. This rich text area field supports advanced formatting options including font selection, size, color, as

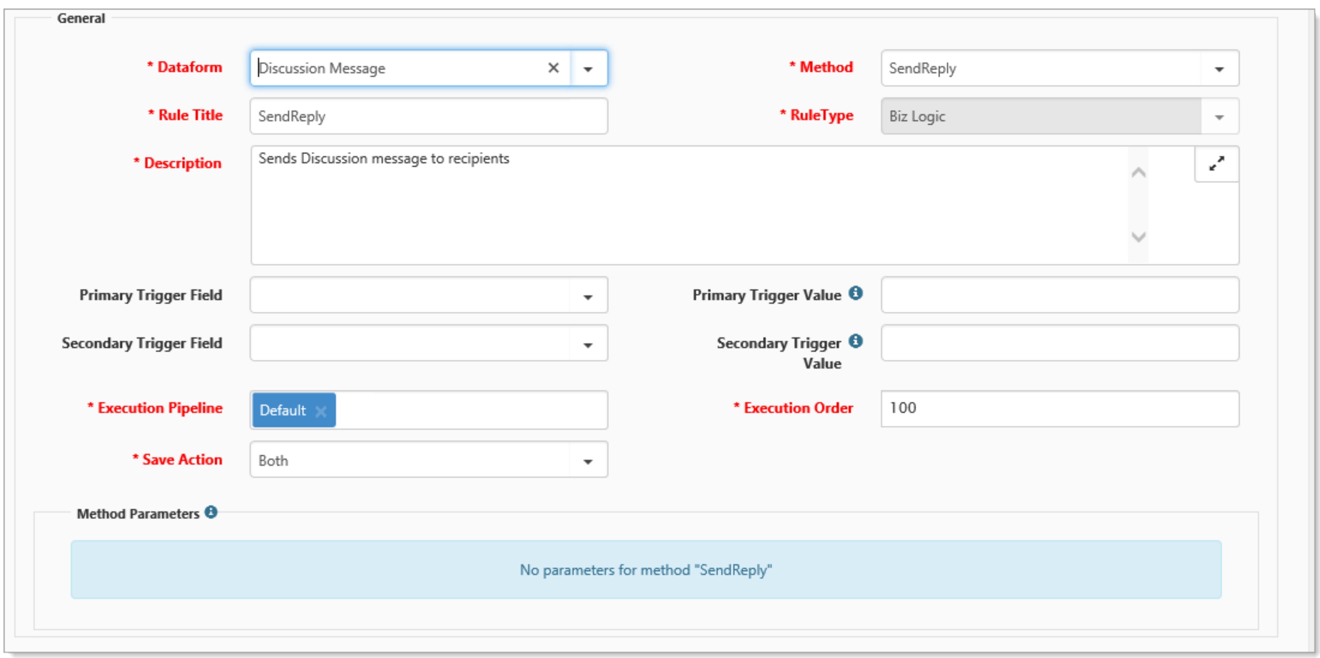
	well as additional formatting, such as bold, italics, and bullet points. This field is available when the Rule Type is Hard Error or Soft Error. The text in this field displays when the rule fires.

4. Click **Save**.

Configuring Case Discussion business rules for replies

With the advent of email to case discussions, there are two flavors of Case Discussions. This topic pertains to the original version of Case Discussions that supports a REPLY link in the discussion message. While there are certain areas of similarity in the two configurations, the required business rules are not compatible. For purposes of this topic, the SendReply rule must be enabled on the Discussion message and its email integrated equivalent must be deactivated.

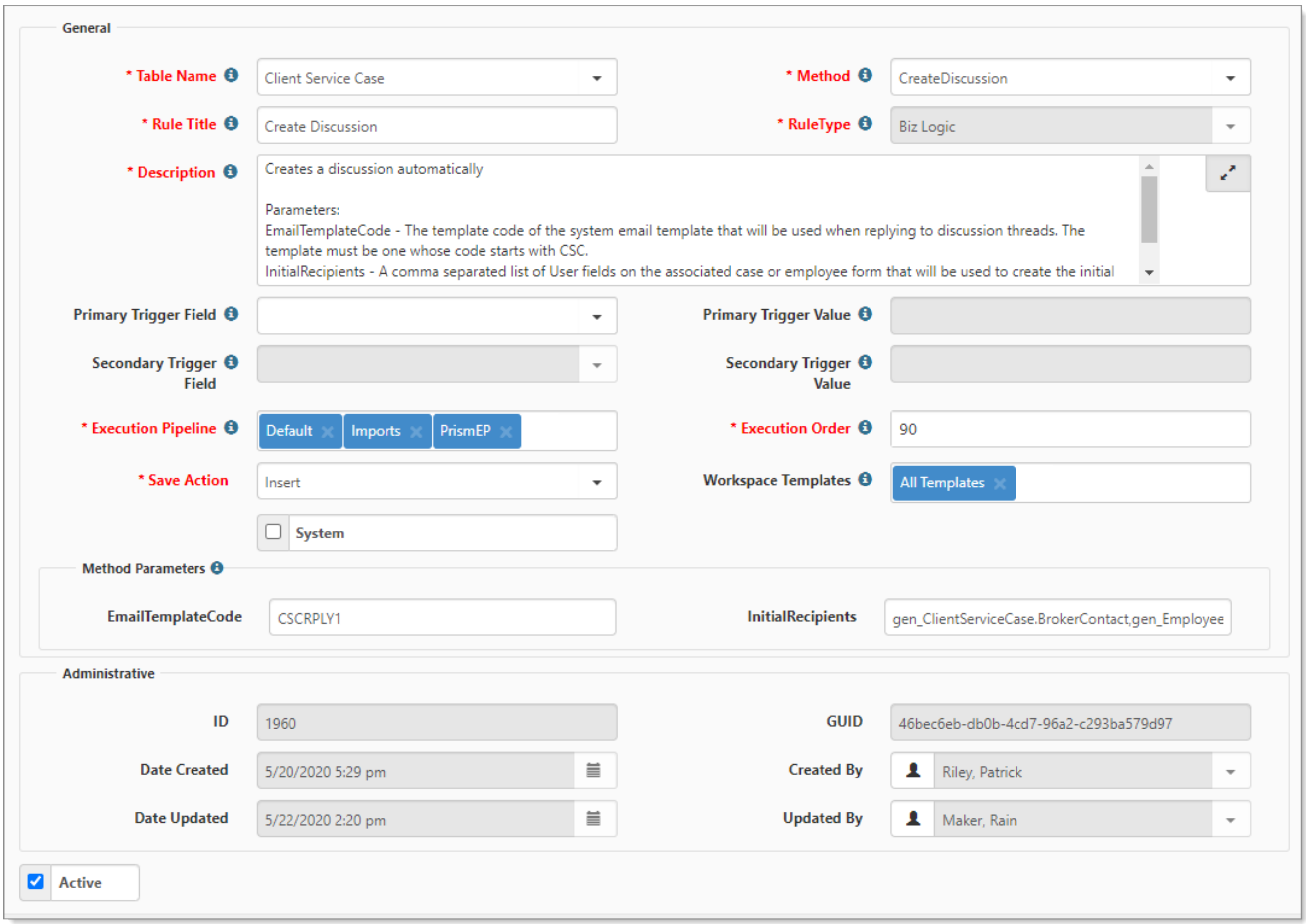
SendReply (original)



- Uses **CSCDISC** [sent to external user] and **CSCDISCNEW** [sent to internal user, notifies that a new reply has been posted]
- Set on **Default Pipeline**
- **Must** inactivate the **SendEMailIntegrationReply** rule

Configuring Create Discussion business rules

The Client Service Case rule **Create Discussion**, automatically creates a case discussion based on configured triggers. The rule is scripted as inactive and requires the following parameter configuration: **EmailTemplateCode** and **InitialRecipients**. After you configure and activate, the rule creates a new discussion and triggers an automated email to the initial recipients based on the rule parameters.



Related data:

- Method: CreateDiscussion
- Rule Title: Create Discussion
- Rule Type: Biz Logic

To configure the rule:

1. Go to **System Admin** ⚙ > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. Open the rule **Create Discussion** (click Jump).
   The Rule Details form opens.
3. Complete the form.

Primary Trigger Field	Optional. Select a field from the Table Name, which is the Client Service Case.
Primary Trigger Value	When you specify a Primary Trigger Field, then select a value. For example, for Primary Trigger Field = Communication Method, you can specify a value, such as Employee Portal.
EmailTemplateCode	Enter the template code of the system email template that is used when replying to discussion threads. The template code must begin with **CSC**. See Configuring Case Discussion Email Templates.
InitialRecipients	This is a comma-delimited list of User fields on the associated case or Employee form that is used to create the initial email recipients for the discussion response. Field names must follow the tableName.fieldName format. For example, gen_ ClientServiceCase.BrokerContact.
Active	Select **Active** to enable the rule.

4. Click **Save**.

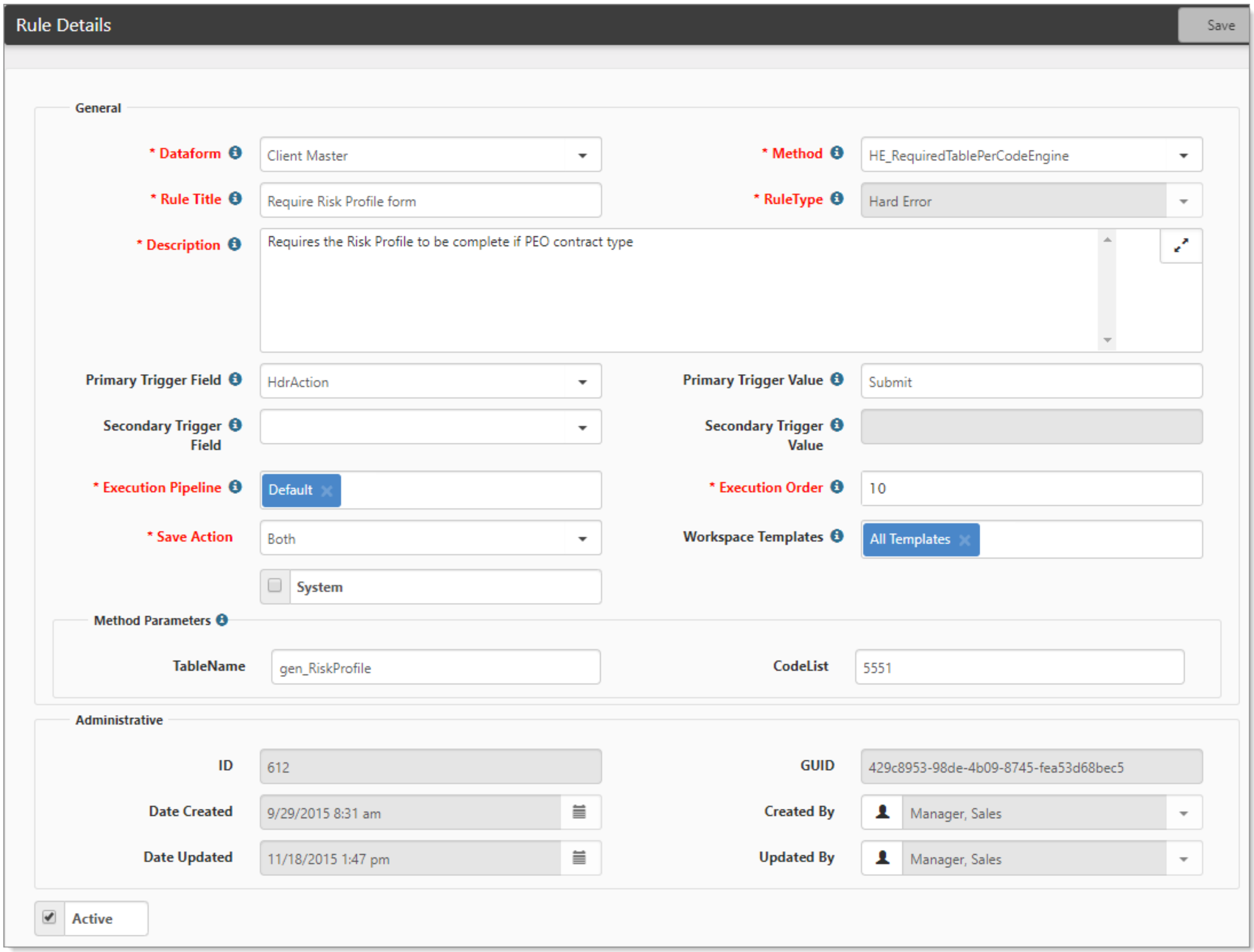
Requiring a dataform for workflow channels

To require a dataform to be completed before you can change the Contract Status, configure the **HE_ RequiredTablePerCodeEngine** biz rule. This also puts a link on the Client Master header to access the dataform and complete it.

To configure the rule:

1. Go to **System Admin** ⚙ > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.

2. Locate and open the entry with Method Name **HE_RequiredTablePerCodeEngine**.
   The Rule Details form opens.



3. Configure accordingly:
   - The CodeList field cannot have any spaces.
   - The CodeList field can be comma-separated with no spaces after the comma.
4. Click **Save**.

Chapter 6
Configuring lookups

Lookups are one of the most flexible datatypes in ClientSpace and are easily configurable when you understand how they work. Lookups are predetermined, selectable lists of information to ensure data are recorded consistently, instead of a straight text field, which leaves room for errors in spelling and formatting. When you decide to use lookups, you need a Lookup Group (our example – in the subsequent topics – uses *US States*) and the associated Lookup values (in our example, the individual states are the values). The following procedures and subsequent topics show you how you can use lookups to get the most out of your ClientSpace system.

> Exercise extreme caution when administering Lookup Groups and the corresponding Lookup values. The system uses values, such as CSC_Status, in triggering business logic. Changing or deleting these values can result in system issues, which may require programming to resolve. If you are unsure about changing or deleting a value, please log an Extranet case. It is far better to deactivate a value than delete it, but it is even better to err on the side of caution and ask first.

1. Add a Lookup Group

Lookups consist of a Lookup Group and Lookup values, which contain, at a minimum, a Code and Decode value. For new lookups, first, create the Lookup Group. Then you create the Lookup values.

To add or configure a Lookup Group:

1. Go to **System Admin** > **Lookups** > **Manage Groups**.
   The Lookup Groups dashboard opens. From here, you can manage or add groups or edit the values of an existing group.
2. To add a new group, click **Add**.
   The Lookup Group Details form opens.

Group Name	Enter a unique group name to avoid confusion when using lookups.
Metadata Dataform	A lookup can reference associated metadata through another dataform. However, if not configured correctly, it can cause errors. Before you configure lookup metadata, please log an Extranet case. For more information about metadata, see Lookups with metadata.
Description	Enter a unique description to avoid confusion.
System	Indicates this group is a building block of the system. When marked as System, it is locked down and not editable.
Active	Select this option to activate the new group.

3. Click **Save**.

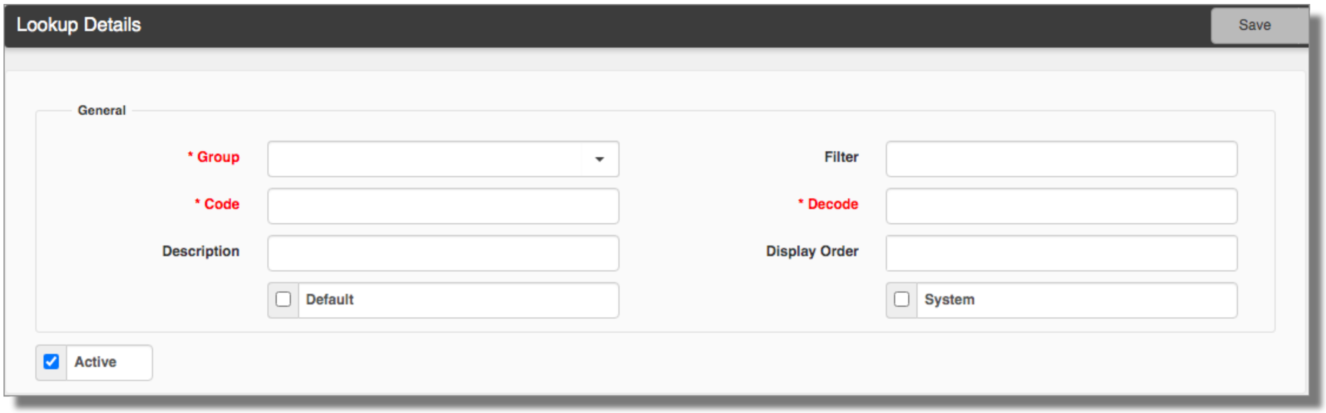
You are returned to the Lookup Groups dashboard.

2. Add values to the Lookup Group

Now let's add values to your group.

To add values to the new group:

1. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens.
2. Before adding values to a group, it is helpful to first search for the group in question and then review the existing values (Code and Decode columns) to make sure you do not create duplicates. Remember to select **More** > **Show** > **All** when searching because archived values are hidden from the list by default.
3. Click **Add**.
   The Lookup Details form opens.



4. Complete the form:

Group	Select the new group you just added.
Filter	Filter can further refine the lookups or use a lookup group more flexibly. This field works in conjunction with the Filter Value field on the dataform to associate a lookup with a dataform field. Filter can be a word or single characters that represent what you are filtering. To specify multiple filter values, use a comma-separated list with no spaces – for example, `South,SE` or `Purple,JewlelTone`. When you specify multiple values, it acts as an OR mechanism. For a list of US States, you might specify a state as South and SE (Southeast). So, when a geographic region is selected, the state is available in two regions. For details on how to configure filters, see Basic field filtering: Using the lookup Filter and dataform field Filter Value.
Code	The Code value is the actual data value stored in the database when a record is saved. • Do **not** change the Code value of a lookup included with the system because after it is set, there may be logic that includes this code value in the application. • Remove spaces and special characters from the Code value when creating a new lookup record. Use PascalCase formatting – that is, the first letter of each word is capitalized – for example,

	WinterMonth and SummerMonth.
Decode	The Decode value is what displays on the dataform. Code and Decode are often the same but are not required to be.
Description	If the Decode value does not provide a logical description of its purpose, then add a description.
Display Order	Display Order assigns how the values display in the list.
Default	You can set one value as the default when a dataform field is configured to this lookup. For example, on the Workers' Comp Claim dataform, the Claim Type field (which is configured as a lookup field) can default to Medical Only (a lookup value). When you add a new dataform, the field defaults to this value instead of blank. You would set Default for commonly used values.
System	Indicates this value is a building block of the system. When marked as System, it is locked down and not editable.
Import ID	After the lookup is saved, the Import ID field displays. This field is in the Administrative fieldset. Import ID is used for translation during imports that are configured with the lookup datatype. By default, this field is blank and must be set for imports. • This field can either have a single value such as **W** to match what is exported from your external system or has a pipe-delimited list of optional values that translate to the lookup such as **|W|w|Weekly|WEEKLY|WEEK|Week|**. • When passing multiple values, each value is evaluated. The inspection is case sensitive, so **W** is a different value than **w**. • When passing multiple values, use the pipe delimiter between values – for example, **|W|Week|**. • When stringing multiple values together, the pipe delimiter **|** must be the last character in the string.
Active	Select Active to activate the new value.

5. Click **Save**.

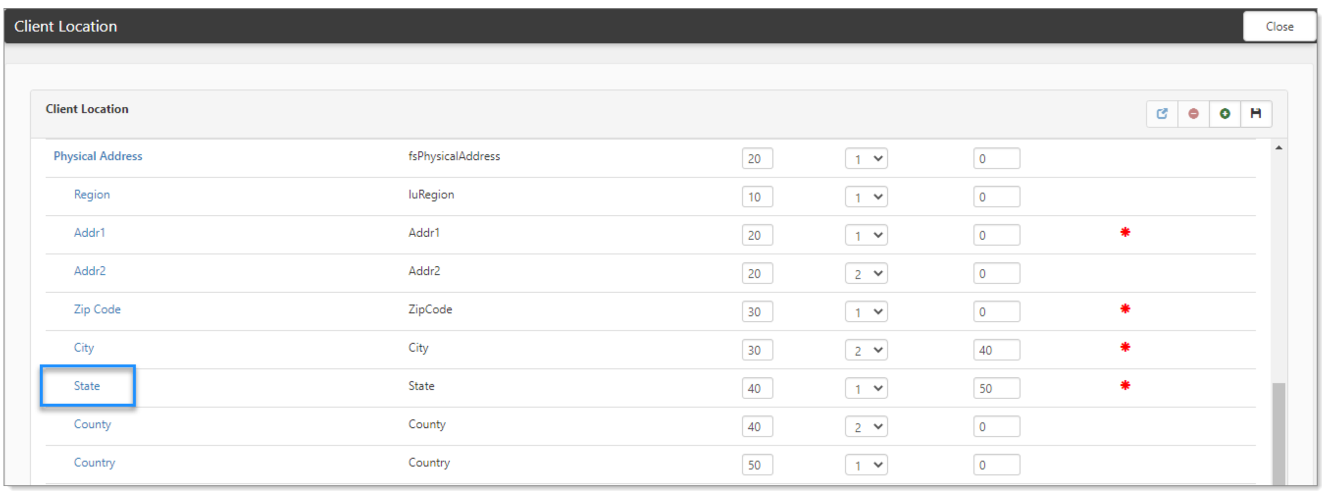
What's next? Now you need to configure the dataform targeted to use the new lookups. Go to Configuring Dataform fields to use Lookups.

Configuring Dataform fields to use Lookups

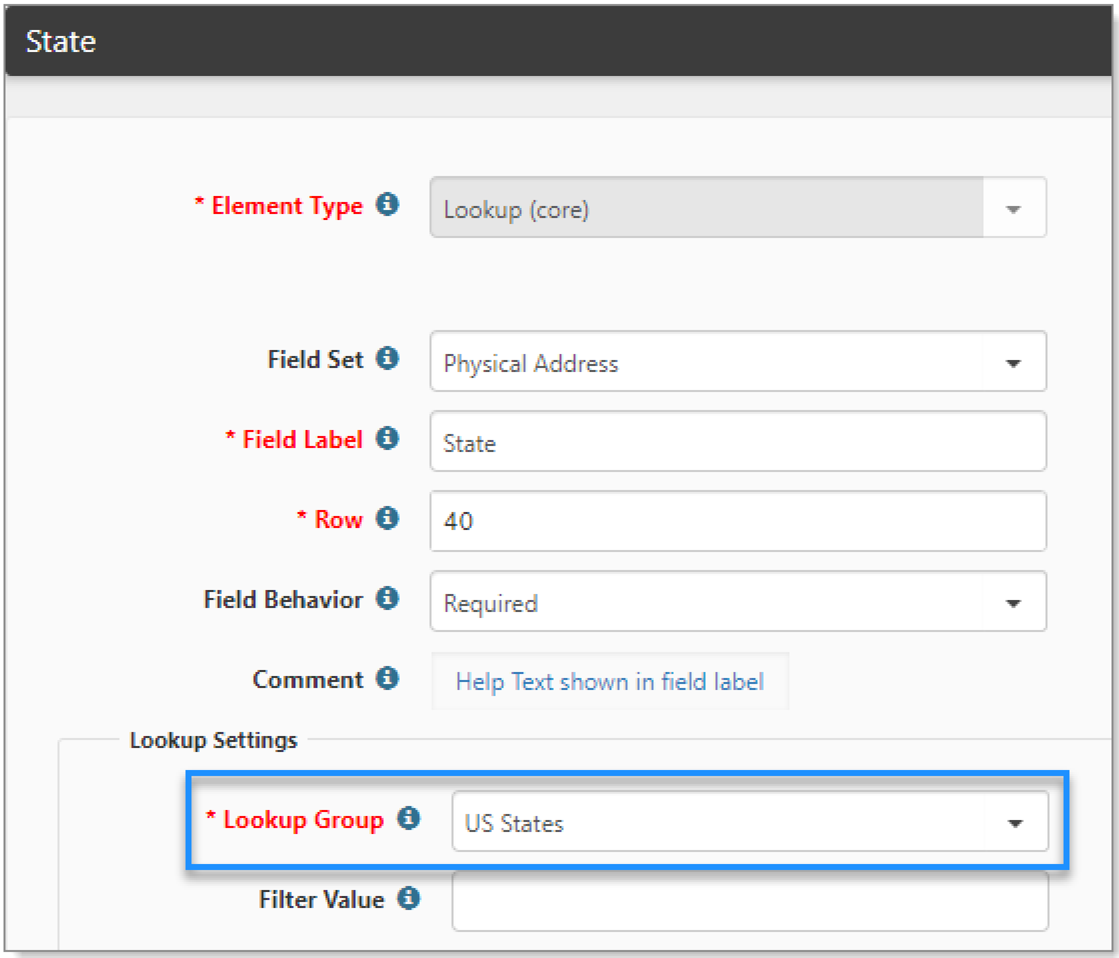
After the group and values are defined, the next step is to connect a field that uses lookups to the new group. The following procedure and subsequent topics use the dataform Client Location and the field State. The State field uses a lookup group **US States**. This topic guides you through configuring a dataform field to use a lookup.

To configure a dataform field to use a lookup:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Locate the dataform and double-click the row or click (**Open**).
   The Dataform Properties form opens. Our example uses the Client Location dataform.
3. In the **Action Center**, click **Fields**.
   The dataform fields are displayed. Our example configures the dataform field State to use a lookup.



4. Locate the field in question and double-click or click (**Open**).
   The form configuration opens for the selected field. Our example shows we selected the field State.
5. In **Lookup Group**, select the group.
   Our example shows that we selected *US States* as the Lookup Group.



6. Click **Save**.

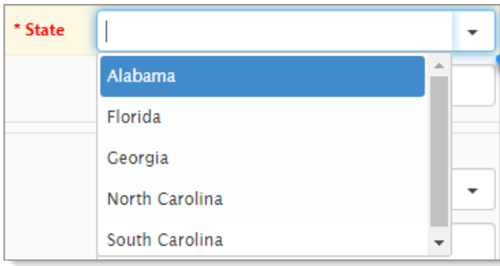
The next step is to reload the dataform to use the new lookup settings.

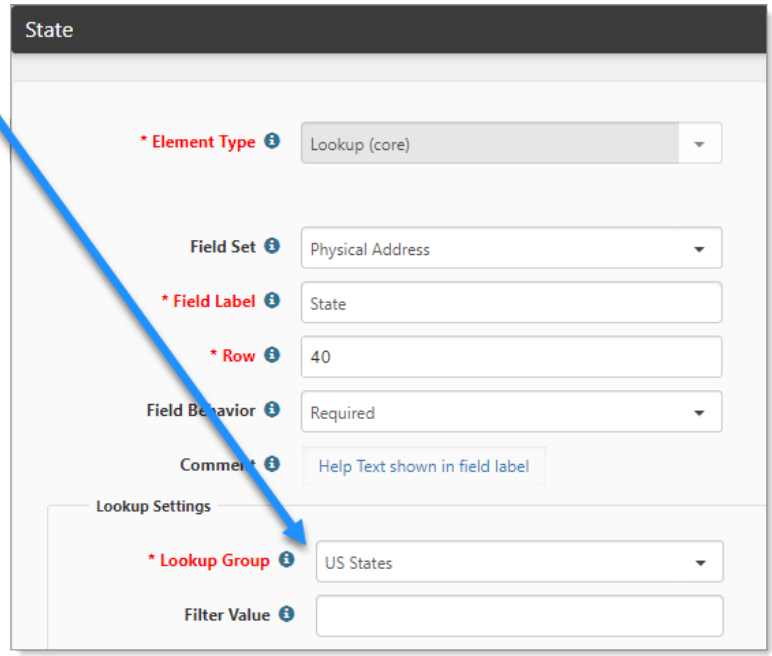
To reload the dataform:

- On the dataform, on the **Action Center** toolbar, click ↻ (**Reload**).
  This action refreshes the dataform to use the configured lookup group.

Putting it all together

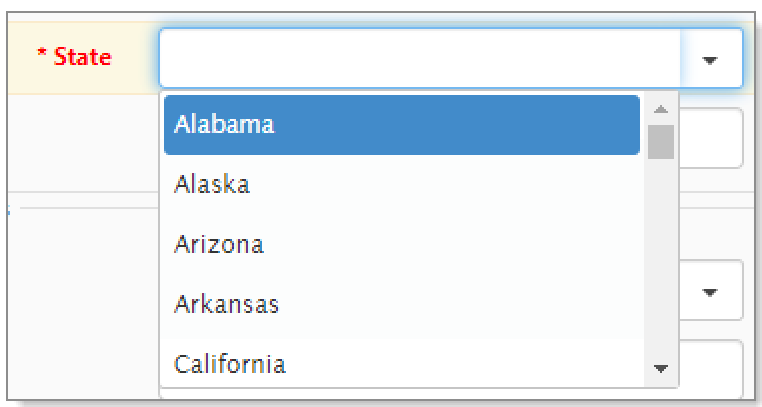
Let's summarize what we did. We have a dataform field named *State* that needs to be configured as a lookup field to standardize the value selections. We configured the field to use the Lookup Group named *US States*.





Basic field filtering: Using the lookup Filter and dataform field Filter Value

ClientSpace provides lookup *field* filtering, which allows you to reduce the number of value choices selected from a dataform field. This is accomplished using the Filter field on the Lookup Details form. You can use the Filter field to filter the dataform field using either a straightforward basic filter or a controlling field using advanced filtering. We discuss advanced filtering in the next topic.



For basic field filtering, let's continue to use the US States as an example. The Lookup Group, named US States, is already established. The lookup values are also established: the states from Alaska to Wyoming (in alpha order). In the preceding topic, we configured the Client Location dataform to use the lookup group *US States* for the field State. Because no filter value is applied, the field displays all the lookup values in the group US States, as shown in the adjacent image.

So then, how can you apply further filtering to limit the list? Let's first look at basic field filtering.

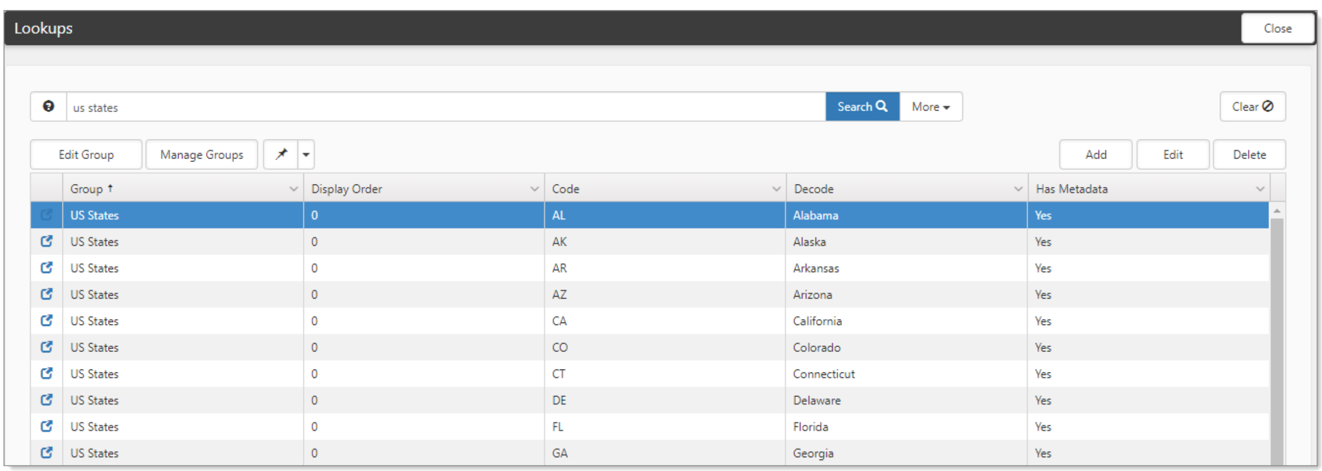
Now let's step through the procedure for configuring basic *field* filtering using the Filter value in the lookup details. For our example, we use Florida and assign a value to indicate a geographic region.

> Basic filtering applies to the Lookup (core), Lookup Type Ahead (core), and Lookup - Multiple (core) datatypes.

1. Assign a Filter value to the lookup detail

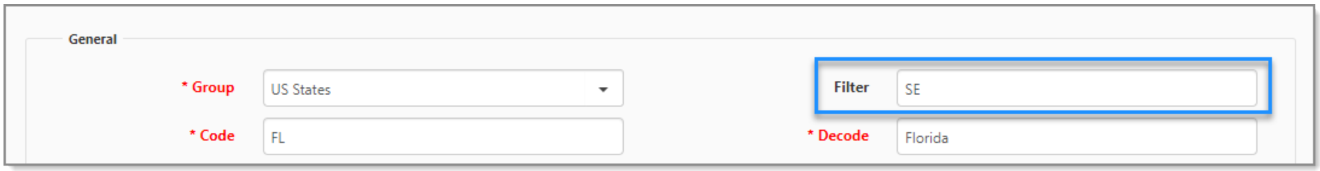
To assign a Filter value:

1. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens.
2. Filter the list to search for your lookup group.
   Our example uses *US States* as the search filter.



Group	Display Order	Code	Decode	Has Metadata
US States	0	AL	Alabama	Yes
US States	0	AK	Alaska	Yes
US States	0	AR	Arkansas	Yes
US States	0	AZ	Arizona	Yes
US States	0	CA	California	Yes
US States	0	CO	Colorado	Yes
US States	0	CT	Connecticut	Yes
US States	0	DE	Delaware	Yes
US States	0	FL	Florida	Yes
US States	0	GA	Georgia	Yes

3. Open a state.
   The Lookup Details form opens. Our example uses Florida. Let's assign a Filter value to indicate a geographical region.
4. In **Filter**, enter a value.
   We assigned a value *SE* to represent the Southeast geographic region.



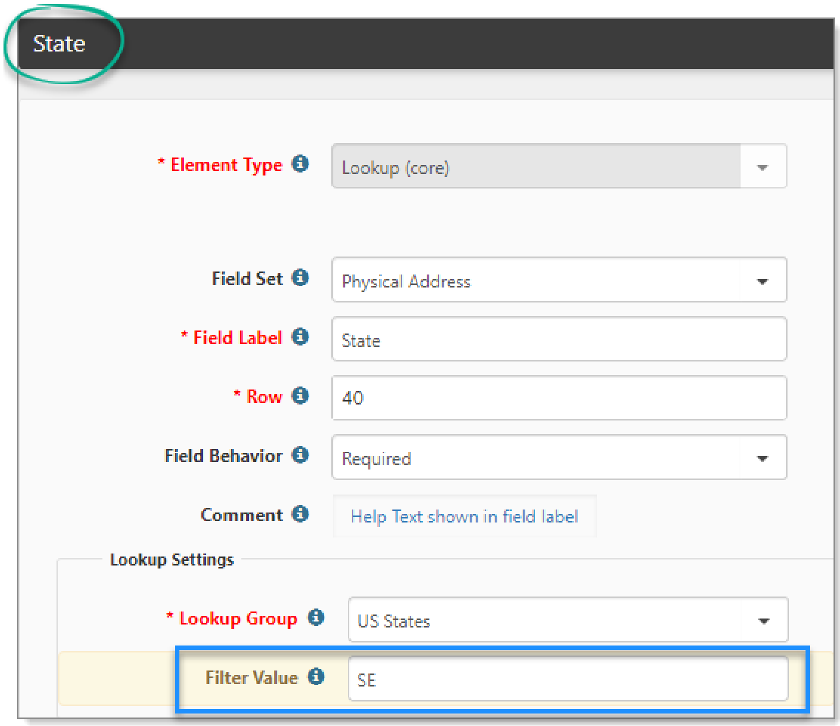
5. Click **Save**.
6. Repeat this process for each of your lookups. For this example, US States, we need to assign an appropriate Filter value to each state (such as, SE, NE, or MW). For your lookup group and values, apply the same approach.

2. Configure the dataform field to use Filter Value

Now with a Filter value assigned to our states, let's see it in action. Note, we have already set the Filter value for all of the Southeastern states. The lookup values (states) have a filter value (such as SE for Florida, Georgia, North Carolina, and South Carolina). However, to use the filter value to limit what is displayed in a dataform field, we must perform additional field configuration. Let's continue the example using Southeastern states. We want to narrow the dataform field to only list states with a filter value of SE so that only Southeastern states appear in the list.

To configure the dataform field using Filter Value:

1. Return to the field configuration. Go to **System Admin** > **Advanced** > **Dataform Admin** > **Fields**.
2. Open the field in question, and in **Filter Value**, enter a value.
   Our example shows the State field with **SE** in Filter Value.



This is the **State** field on the Client Location dataform.

We assigned a Filter Value of **SE** on the dataform field.

3. Click **Save**.

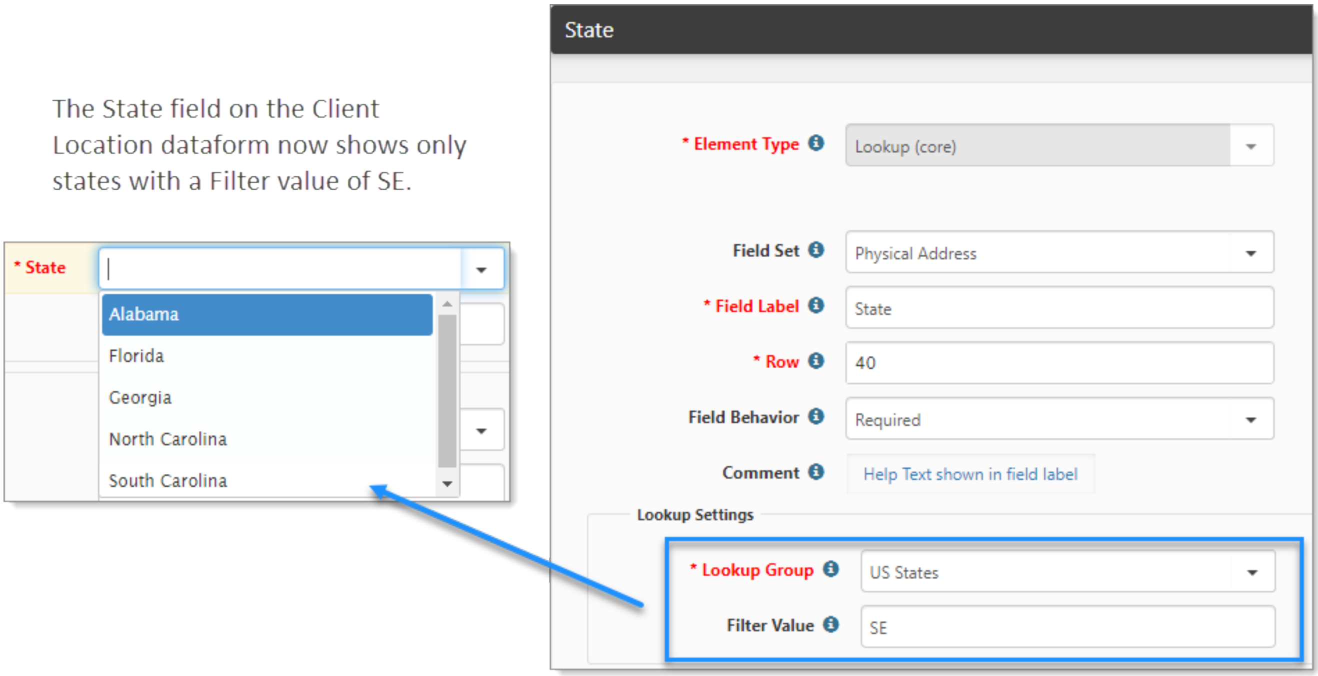
The next step is to reload the dataform to use the new lookup settings.

To reload the dataform:

- On the dataform, on the **Action Center** toolbar, click (**Reload**).

See it in action

Now that we have hard-coded a value in Filter Value for the State field let's see how this looks on the dataform. We only want the Southeastern states to display in the list. So, we assigned a Filter for each state lookup and then set a Filter Value on the dataform field. The State selections are now just the Southeastern states. **



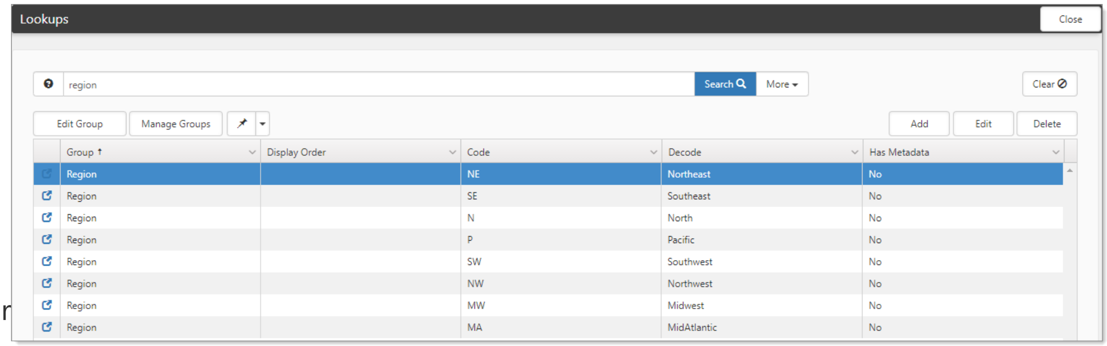
** It is essential to understand that filtered lookup fields display only the lookup values with filters that match the Filter Value on the dataform field configuration and any lookup values in the lookup group that do not have a filter set. For example, states that are not assigned a Filter, such as SE or NE, will, by default, appear in the list of available values. States that display in the list and are not in the Southeast indicate that you need to assign a value to Filter in the lookup details. In other words, assign a Filter value for all the lookups that belong to a Lookup Group – if you do not want irrelevant items in the lookup field list.

Advanced filtering: Using contents of another field and Filter Source

For advanced filtering, we reference two fields, so that when the field value changes for A, then the list for B is filtered with that value. In advanced filtering, you copy the field's Name value that you want to be the source for your filter to another field's Filter Source.

With this in mind, let's take filtering a bit further using our US States example. We want to restrict the range of values displayed in the lookup field *State* using a new field *Region* to hold the values to filter the State field.

Advanced filtering applies to the Lookup (core) and Lookup Type Ahead (core) datatypes, but does **not** apply to Lookup - Multiple (core).



To guide you through this process, we configured a new lookup group *Region*, and a set of lookup values for this group. The code value of the Region lookup matches the filter values we applied to the US States lookups. We use NE, SE, N, P, SW, NW, MW, and MA.

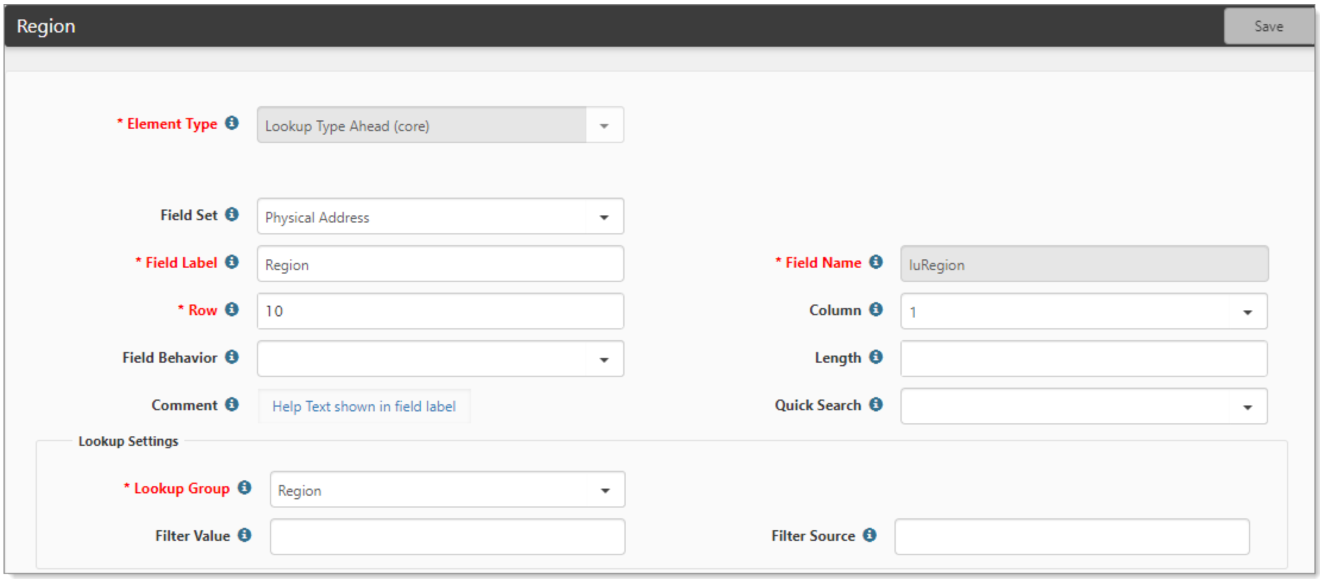
The following procedure guides you through advanced filtering using our example of US States and Region, and the State field.

1. Add a new dataform field

Our example uses a new dataform field named *Region*.

To add a new dataform field:

1. Return to the dataform. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Open the dataform in question. Our example opens the Client Location dataform.
   The Dataform Properties form opens.
3. In the **Action Center**, click **Fields**.
   The field list opens.
4. Add a new lookup field to the dataform and set this field to use the new lookup group (in our scenario, the new field is *Region*) with no filtering on the field. We set the *Region* field to use a Lookup Group named *Region*.

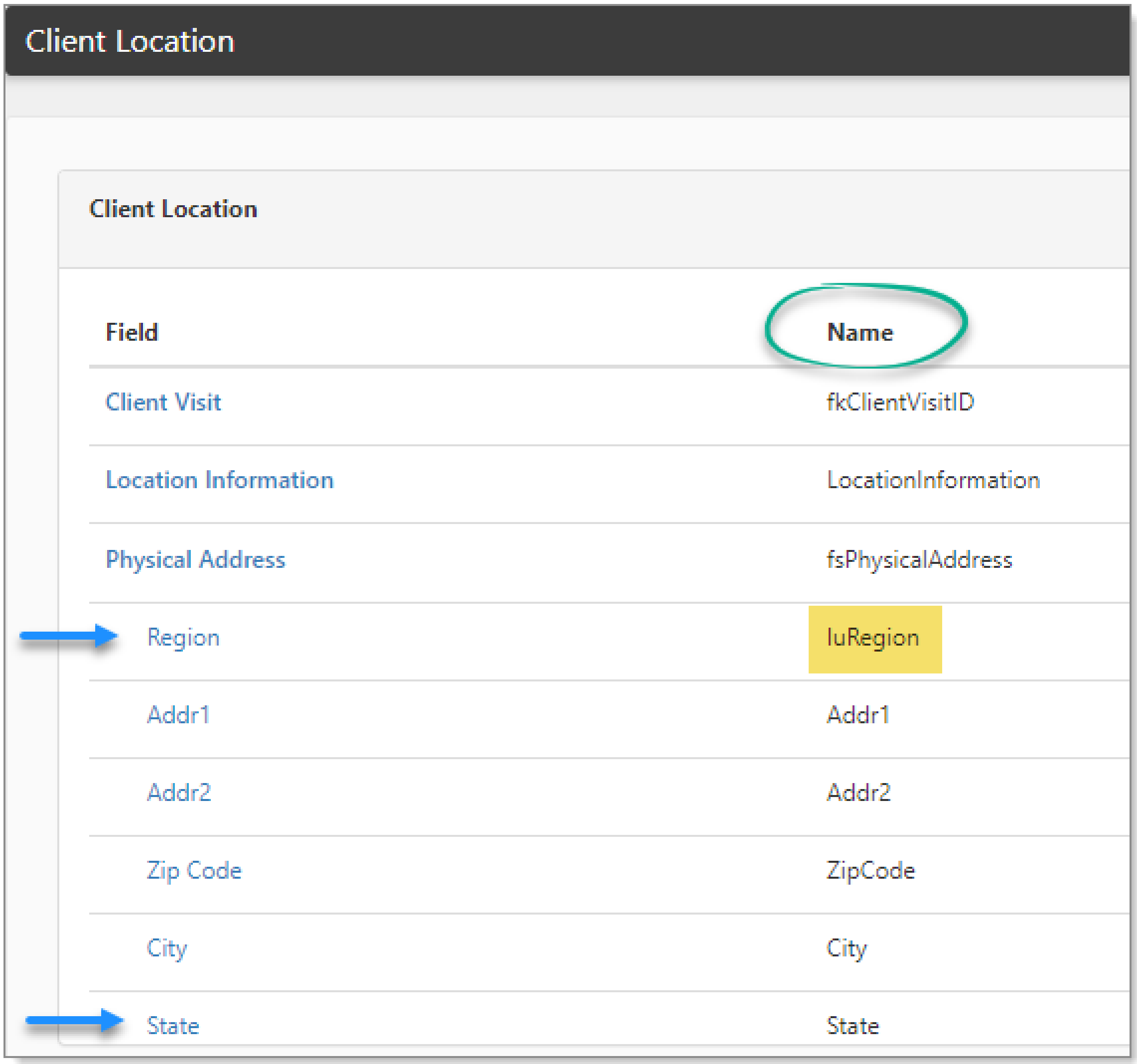


5. Click **Save**.

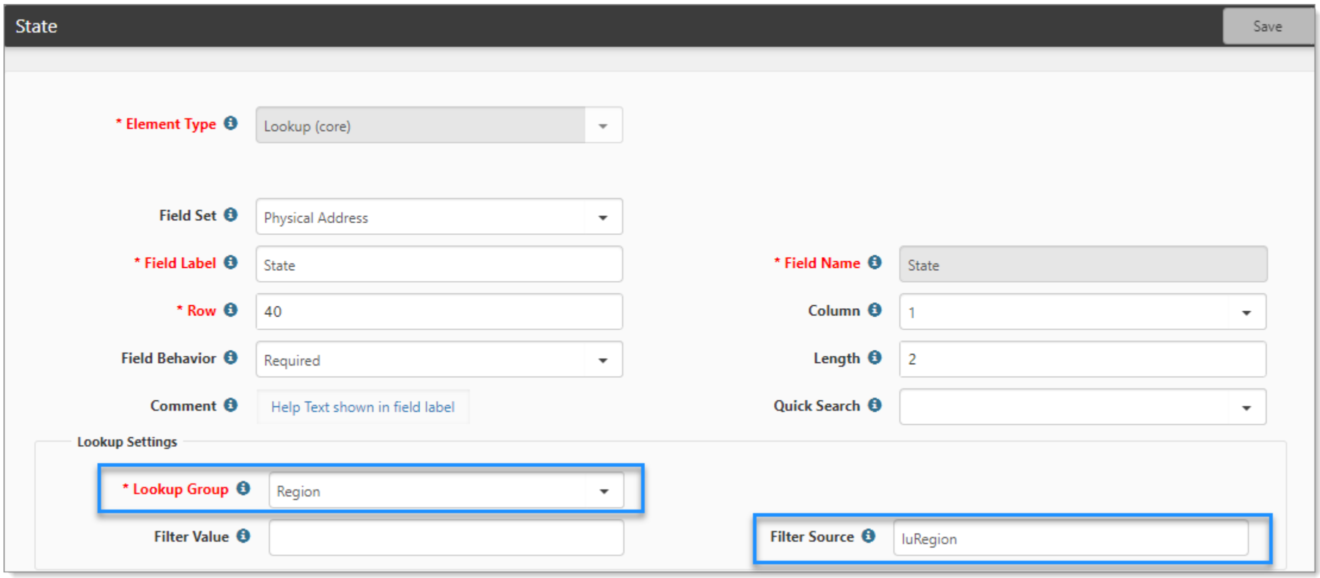
2. Configure the dataform field

We return to the dataform and configure the State field to use the new Region field as its Filter Source. Make sure that the Filter Value field has been cleared. If Filter Source is used in configuring lookup field types, the Filter Value field is ignored.

1. From the dataform field list, copy the Name value of field A. In our example, field A is *Region*, and the value we are copying is *luRegion*.



2. Open the related field (field B, which in our example is *State*).
   The field configuration form opens.
3. In **Filter Source**, paste the copied value.
   Our example shows that we pasted *luRegion* in the State field **Filter Source**.



4. Click **Save**.

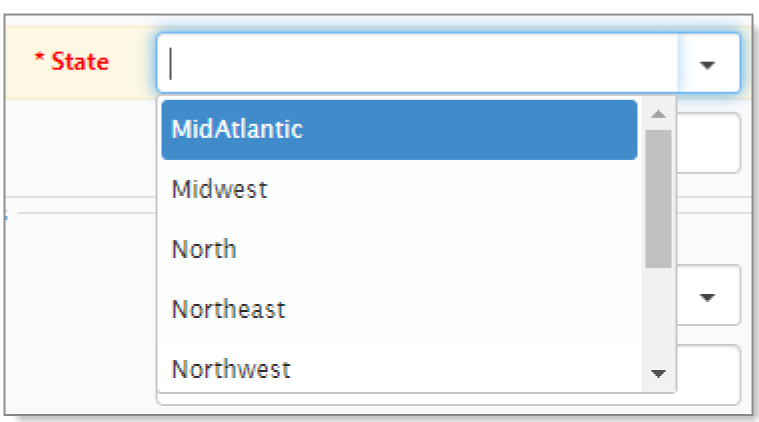
The next step is to reload the dataform to use the new lookup settings.

To reload the dataform:

- On the dataform, on the **Action Center** toolbar, click (**Reload**).

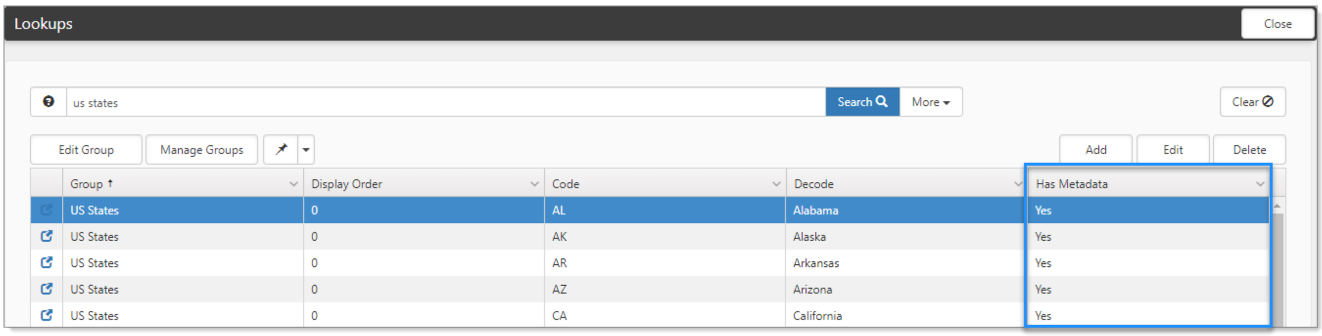
See it in action

Now let's see this in action. With the new configuration, the value selected in the Region field filters the list of available values in the State field of the same form. The Client Location dataform field for *State* now presents a new list of values – the Region values of MidAtlantic, Midwest, North, Northeast, Northwest, Pacific, Southeast, and Southwest. You might use this form of filtering when selecting a group of values (in our scenario *Region* is a group of states) to simplify and standardize lists.



Lookups with metadata

Metadata is data about data and provides even more flexibility for lookup use, enabling data associated directly with a particular lookup selection. When adding a lookup group, you can select a dataform to act as the metadata form for that group (see 1. Add a Lookup Group in Configuring lookups). These are ordinarily custom forms created to store information related to the lookup values used with the lookup group. When a metadata form is associated with a lookup group, the lookups for that group indicate metadata, as shown.



Examples

The **Contract Type** lookup in ClientSpace PEO has associated metadata that can determine:

- What Template is associated with the contract type?
- What Legal Entity / SUTA defaults are available when that contract type is selected?
- Default Workers' Comp Configuration for a workspace.

The **Pay Frequency** in ClientSpace PEO has metadata associated that can determine:

- How many pay cycles per year for that frequency, such as Weekly = 52, SemiMonthly = 24, Bi-Weekly = 26.
- Minimum per check fee to ensure a certain amount of administrative costs are submitted for the year.

> Before you configure lookup metadata, please log an Extranet case.

Configuring task fields

Task fields are configured as other lookup type fields through System Admin > Lookups.

To configure task fields:

1. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens.
2. Click **More**.
   The More dialog box opens.
3. In **Group**, type **task**.
   The list of task configurations becomes available.
4. Select an item and click **Search**.

If the Task Type or Workflow fields are hidden on the Task detail, it is because there are no values configured. After you add a Task Type to the lookup list, it automatically appears.

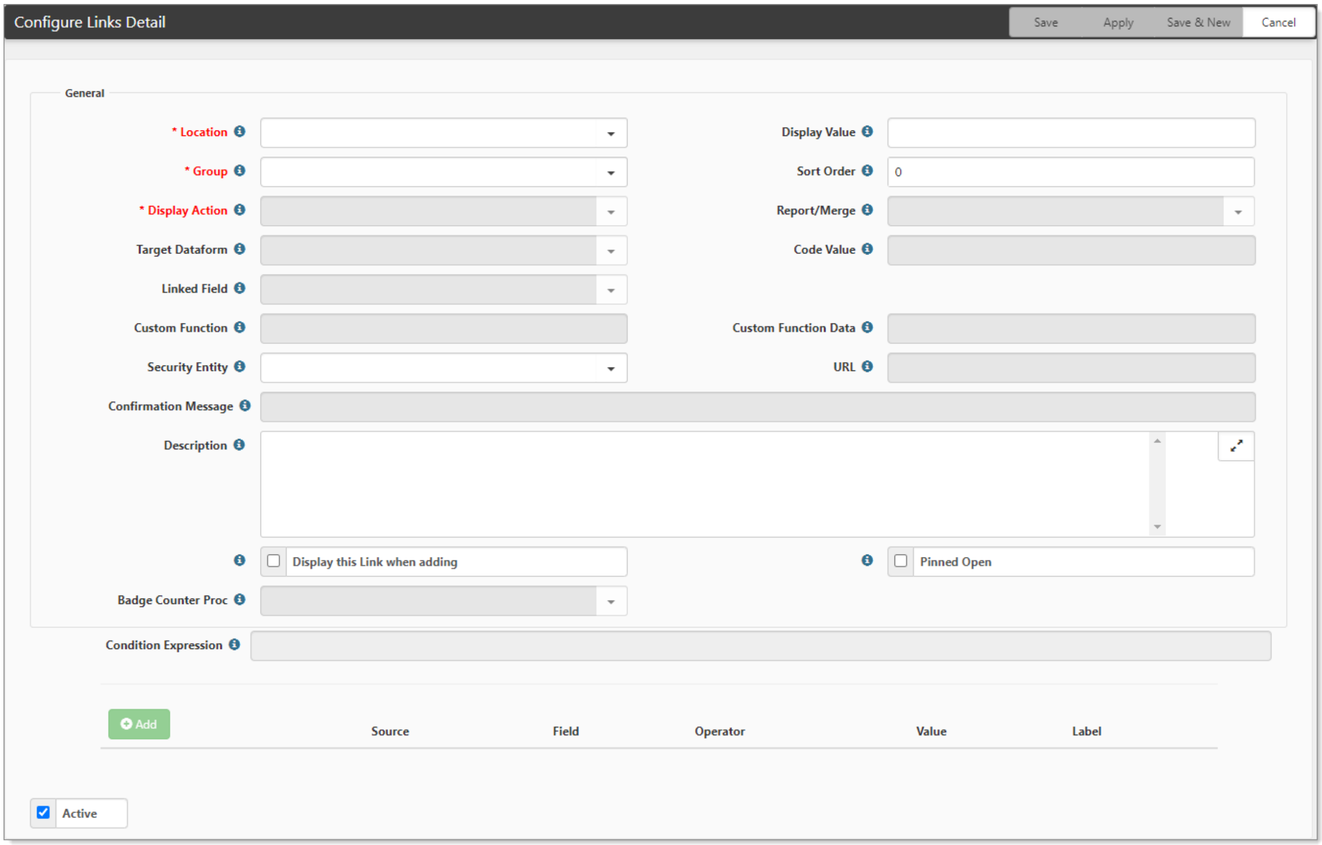
Chapter 7
Configuring links

Configurable links enable administrators to control the accessibility of data in the system dynamically. Configurable links can significantly improve the user experience by making related dataforms, reports, and workflows available from the dataform a user is currently on at specific points in the workflow. You can link to custom reports, merges, and dataforms within the current workspace or the Admin Workspace, or even configure a workflow from scratch. An example of the creative use of configured links is to make reports or workflow links available when specific data is entered. For example, a salesperson can only submit an order for approval when there is a resolution in the order.

This topic provides the tools you need to start configuring custom links. To learn how you can configure link display *conditions*, see Configuring link display conditions.

To configure and manage links:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens. To search the list, see Searching Configure Links.
2. Click **Add**.
   The Configure Links Detail form opens.



3. Complete the form.
   The value selected in **Group** drives the other form fields. The remaining form fields are listed under Display Action with their corresponding Group link.

Location	Name of the dataform or system object on which you want the link to appear.
Display Value	This is what displays in the action area of the dataform or system object as the selectable link. When **Workspace Dataform** is selected, **Linked Field** becomes available.
Group	Denotes the type of link you are creating and drives the other fields on the form to complete the configuration: • **Action** • **Report** • **Link 1**
Sort Order	Orders the Links in the Action Center Workflow Actions first, then

	Links (Link1), then Reports. The Sort Order determines how the individual items are displayed within the groups.

Display Action	Lists the possible actions for the selected link Group. Display Actions are based on the Group selection.
	
	When **Group** = **Action**, the Display Actions are:
	• **Custom Function**: Call a custom JavaScript function to perform an action (requires additional coding by our development team).
	  ◦ Custom Function enables the Custom Function and Custom Function Data fields.
	• **Submit w/Action**: Generates a HdrAction on the page to trigger rules or Workflow.
	  ◦ Enter this HdrAction in Code Value.
	• **Submit w/Action (close)**: Generates a HdrAction on the page to trigger rules or Workflow, and after generated, the page closes.
	  ◦ Enter this HdrAction in Code Value.
	
	When **Group** = **Link1**, the Display Actions are:
	• **Custom Function**: Call a custom JavaScript function (requires additional coding by our development team).
	  ◦ Custom Function enables Custom Function and Custom Function Data.
	• **Workspace Organization**: Open the workspaces associated Organization.
	• **Workspace Organization Contacts**: Open the workspaces associated Organization Contacts.
	• **Workspace Dataform**: Open a workspace dataform from the header of this dataform.
	  ◦ Select the dataform in the Target Dataform field.
	  ◦ If configured for a dataform with a foreign key relationship, this brings back associated records.

	◦ Workspace Dataform links adhere to the relationship to the dataform on which the link is configured, filtering the returned data appropriately. For example, configuring a Workspace Dataform link on the Employee dataform to the WC Claims dataform returns only claims associated with the employee in question. • **Admin Dataform**: Open an Admin dataform from the header of this dataform (Admin dataforms live in the Admin Workspace). ◦ Select the dataform in the Target Dataform field. • **URL**: Open another web page in a new tab or window depending on your browser configuration settings. ◦ Enter the URL in the URL field. When **Group** = **Report**, the following Display Actions are: • **Run Report**: This is the Report or Merge that executes when you select the link. ◦ Run Report enables the Report/Merge field. • **Run BI Report**: This is the link that is displayed in the Action Center. ◦ BI Report links follow CurrentUser and RecordID filtering. ◦ Run BI Report enables the Report field. • **Open Filter Page**: This is the link that is displayed in the Action Center. • **Custom Function**: This is the custom function to be called.
Report / Merge	The Report or Merge to execute using a Display Action when a Report link is clicked. When the link is clicked, a form ID of the dataform is passed. Report/Merge are only available when Group = Report. • **Report** is available when you select Run BI Report in Display Action. • **Report/Merge** is available when you select any other Display Action when Group = Report.

Target Dataform	This is the dataform to be opened from configured dataform links (Link1). This field is enabled when a Link Group is selected.
Code Value	The HdrAction that is produced when the link is clicked (Action).
Linked Field	The selections in this field are driven by the parent-child relationship of the **Location** dataform and the **Target Dataform**. The link on the Location dataform will link to the selection in Linked Field. When there is only one field, it automatically displays. For example, when there are two parent fields on the Client Service Case connected to the Employee, the Linked Field determines which field the Employee link references.
Custom Function	The custom function to be called from an Action link.
Custom Function Data	The data that is passed to a custom function, if required.
Security Entity	Select a security entity to secure the link for viewing. For users to see the link, they must be in a role with the security entity.
URL	This is where you configure the URL that you want to open on a URL Display Action. For an external URL, you must include the protocol (http:// or https://) as links without this are treated as internal to the application.
Confirmation Message	Before running the link action, display an OK / Cancel dialog box with a message. Most often used with Action Links.
Description	Provide a description of what action the link does. This description displays when you hover over the link on the dataform or system object.
Display this Link when adding	Prior to Save, dataforms do not normally display links. This option allows you to display the link before the initial form Save. Single dataforms with defaulted fields can appear as though they have been saved before the actual record exists in the database. If you configure a link and it does not appear when you are testing, try saving the dataform. If you want the link to always appear, regardless of whether the dataform has been saved, select the **Display this link when adding** option.

Pinned Open	When this option is enabled (selected), it forces the link to display in the Action Items area. The link does not collapse when the associated group is collapsed.
Badge Counter Proc	Select a stored procedure to display a count of the Active and Inactive records for the Location.
Condition Expression	Condition Expressions use Labels from Display Conditions along with AND, OR, and NOT operators to control precedence and sequence. You can create complicated Link Display Conditions using unique combinations of the configured display conditions configured in the Add section. Using the Label field on the Link Display Condition, you can combine trigger conditions into more complex expressions, overriding the default OR behavior. For example: (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Link Display Conditions that are not included in the Condition Expression are ignored. The expression in this field is derived from the added conditions. See Configuring link display conditions. For more information about Condition Expressions, see Condition expressions. Project Code is set in Workspace Settings. Link configurations accept ProjectCode or TemplateCode as a Field trigger, allowing you to use Template Code to limit link display to all children of a given Template or Project Code to limit displaying a single Client Workspace.

4. Click **Apply**.

To configure Business Intelligence reporting link:

1. In **Group**, select **Report**.

2. In **Display Action**, select **Run BI Report**.
   Run BI Report provides a list of available target BI reports in the **Report** selector. BI Report links follow CurrentUser and RecordID filtering.

To add conditions:

1. Go to the next topic, Configuring link display conditions.

Configuring link display conditions

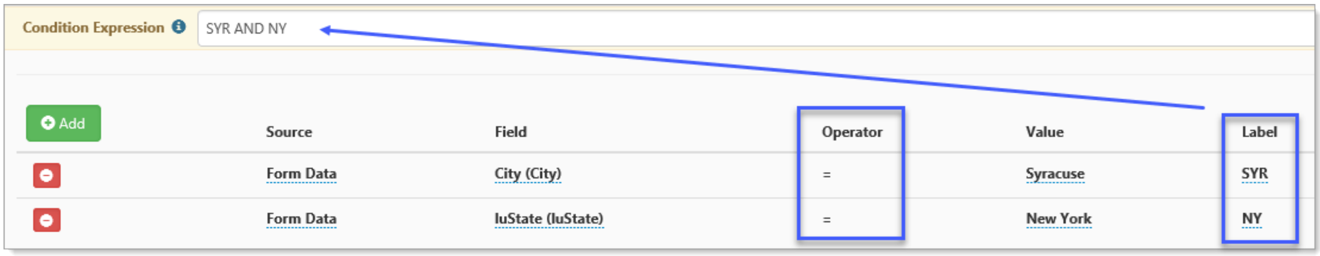
When you customize a link, you can control how and when it displays. Display conditions ensure that your configured link displays only when and to whom you want. These link display conditions can trigger either from a field on the dataform, or from a trigger value returned in a Header proc (custom code developed by our development team). Display conditions appear in the Add section of the Configure Links Detail form. You can add multiple display conditions.

By default, multiple display conditions are treated as OR statements when determining display behavior unless a Condition Expression is configured for this link. Adding a Condition Expression makes the triggering condition explicit, meaning that display conditions not included in the Condition Expression are ignored. For a detailed explanation of how condition expressions work, see Condition expressions.

In the **Add** area of the form, you define conditions using **Source**, **Field**, **Operator**, and **Value**. You assign the condition a name using **Label**. Label values are used in the **Condition Expression** field located before the **Add** area.

You can use multi-lookup fields for triggering conditions (Field and Value columns in the Add section). Each value from the multi-lookup can be added as a separate = condition. This supports complex AND, OR, and NOT conditions. The following image is an example of conditions using the =

Operator and a Condition Expression. The example specifies that both conditions SYR and NY must be met.



To configure link display conditions:

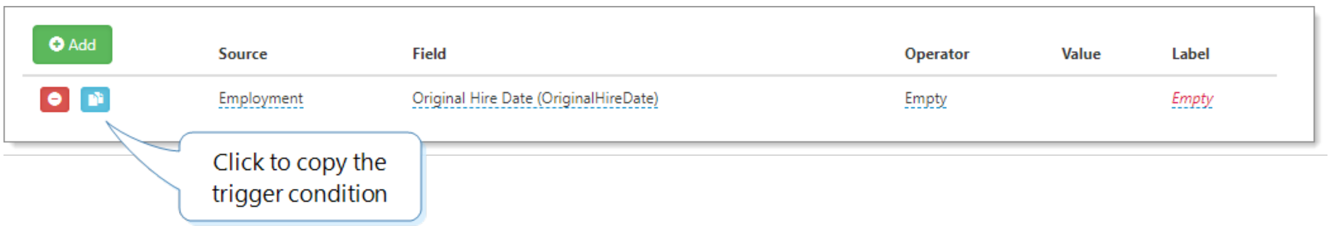
1. Click **Add**.
   A row opens with the following fields: Source, Field, Operator, Value, and Label.
2. Complete the fields as appropriate.

Source	This is where the system looks to find the trigger value that matches your condition. The options are: • **Form Data**: The system looks at the dataform to find the triggering field and value. • **Header Proc** (1 or 2): The system runs a stored procedure when the dataform opens. Can pull information from other dataforms in the system.
Field	This is the field that is interrogated for the trigger **Value**. The available fields are determined by what you selected in Source. You can use multi-lookup fields as triggering conditions. Each value from the multi-lookup can be added as a separate = condition. This supports complex AND, OR, and NOT conditions.
Operator	Operator options are dynamic and are driven by the datatype selected in **Field**. Options are Equals, Does Not Equal, Empty, Greater Than, Greater Than or Equal, Less Than, Less Than or Equal, and Not Empty.
Value	This is the value in the trigger Field that evaluates to true and must match the value stored in the database. Start typing a Value when Field is a parent form or a lookup. Value can also be blank (*Empty*) when triggering links from Form Data, enabling display conditions when a field is empty. Blank is only valid when the Source is **Form Data**.
Label	Provide a Label when building a condition expression in the Condition Expression

	field. Examples of a Label could be Cond1, Cond2, Cond3. Additionally, you may want to be more descriptive. If you are filtering for a city, then use the city name, such as NYC, or use NY to represent a filter for the state. A best practice is to use short names.

To clone a trigger:

1. In the **Add** section, locate an entry that you want to copy.
2. Click **Clone**.
   A new row opens, with the trigger condition copied. Source, Field, and Operator are copied.



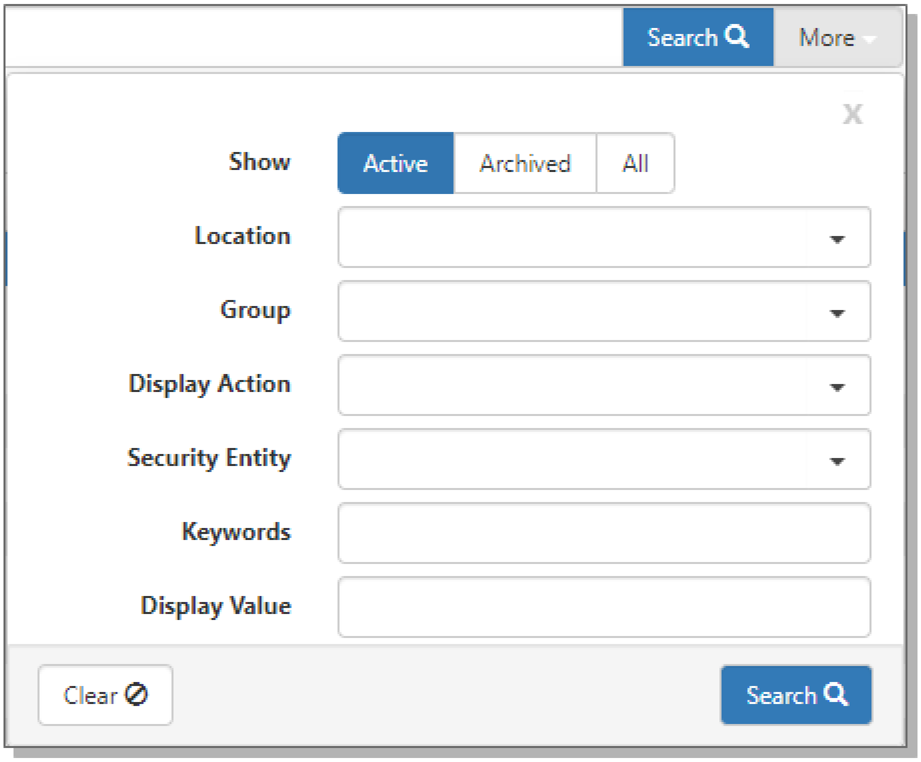
3. You can now edit the new condition as appropriate.
4. When ready, click **Apply** or **Save**.

Searching Configure Links

From the Configure Links dashboard, you can search using Quick Search and More search. The search looks for matches in the Location, Display Value, and Display Action columns.

To search the Configure Links dashboard:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. In **Quick Search**, you can search using:
   - equals: Finds the entry with the search string entered.
   - starts with: Search for entries that start with the search string entered.
   - contains: Use the % symbol to search fields with the search string that follows %.
3. Click **More** to add more search parameters.
   The More search dialog box opens. Options in this dialog box reflect columns in the Configure Links dashboard along with Security Entity and Keywords.
4. Select your options and click **Search**.



More Search provides:

- Field-specific searches.
- Creates filter chiclets, which display your current search parameters.
- Filters are additive. For example, you can search for entries with Location **Employee** and Display Value **Terminate**.
- The **Show** filter is standard across all searches. You can filter for Active, Archived (inactive), and All records (both).

Configuring the Benefits Batch link to the Pricing Console

You can easily access the Benefits Batch from the Pricing Console. To do this, you must activate the Benefits Batch link.

To activate the link:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.

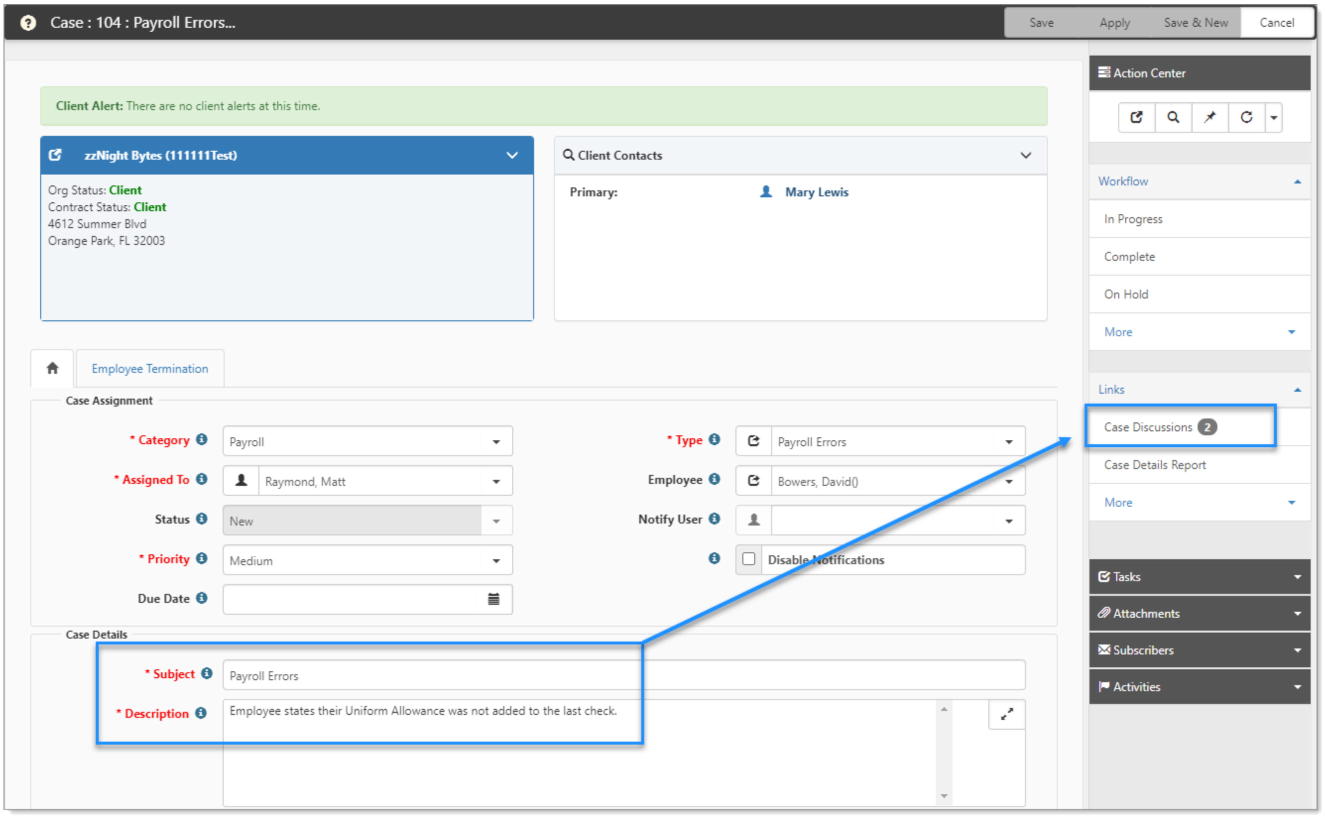
2. Locate the record with Location = **Client Master** and Display Value = **Benefits Batch**, and click (Jump).
   The Configure Links Detail form opens.
3. Select **Active**.
4. Click **Save**.

Chapter 8
Cases

Cases help you manage assignments and resolve issues - whether they are for internal to your organization or relate to client issues. Case types are a way to group cases so that you can manage the resolution by more effectively managing by types. Case discussions allow you to communicate effectively with your clients in a conversational manner, directly from the case that they log. When you use case discussions, you can keep much of the communication outside of the case but still connected should you need to reference the discussions.

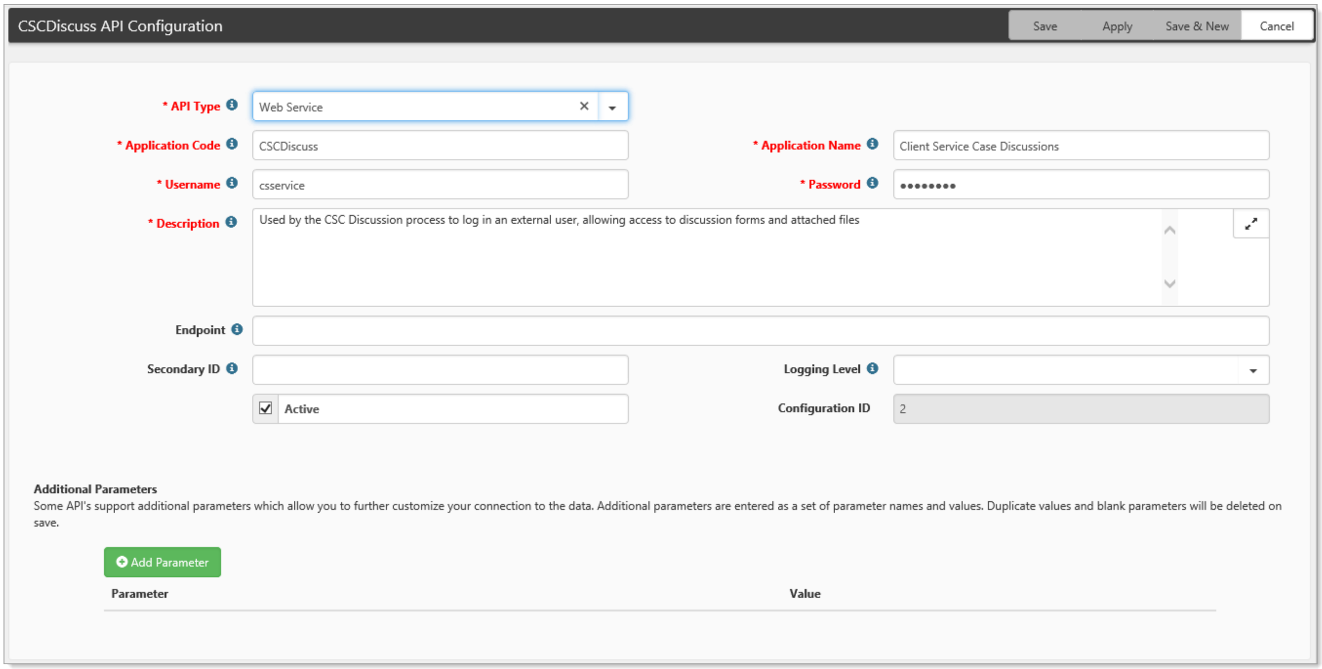
Configuring client service case discussions

ClientSpace supports Client Service Case (CSC) discussions, which are threaded discussions attached to Client Service Cases designed to make communicating with external Case users more fluid. Discussions support specific email templates that provide standard replies to common case types. This chapter includes detailed information about configuring the API record, Email Integration, and the Email Templates to automate and standardize your messages.



Configuring the API

First, you need to set up an API configuration to allow the external discussion thread replies to attach to ClientSpace and create the Client Service Case Discussion message. The purpose of the API record is to sign in the external user for access to the case discussion threads.



To configure the API fields:

1. Go to **System Admin** > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. Click **Add**.
   The New API Configuration form opens.
3. Complete the form fields required to configure Client Service Case Discussions.

API Type	Select **Web Service**.
Application Code	Select **CSCDiscuss**.
Application Name	Type **Client Service Case Discussion**.
UserName	Provide a username.
Password	Provide an appropriate password.
Description	Suggested description: Used by the Client Service Case Discussion process to sign in an external user, allowing access to discussion forms and attached files.

4. Click **Save**.

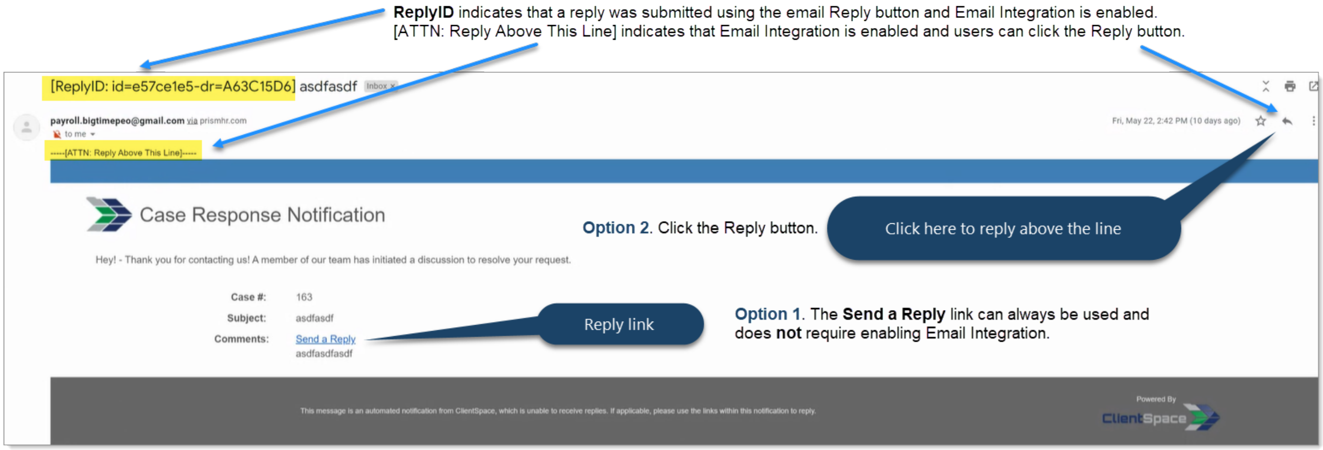
Configuring Case Discussion Email Templates

Case Discussions use email templates to send the content of the Discussion Message to the designated recipients. The email templates that make this happen are CSCDISC: Case Discussion, CSCRPLY: Case Discussion Reply, and CSCDISCNEW: Case Discussion New. ClientSpace administrators can configure these email templates to meet the needs of the organization. For example, you may need several reply templates to address stop payment authorizations or payroll issues.

Send a Reply and Reply Above This Line

Recipients can reply to the email using an embedded **Send a Reply** link in the email message that opens the discussion thread. The Send a Reply link is always available. Optionally, you can configure ClientSpace to allow responses using the email mailbox **Reply** button. The Reply button initiates Reply Above This Line functionality.

Reply Above This Line allows users to reply to a Case Discussion directly from their email mailbox using the Reply button, as you would with any other email reply. This functionality requires additional ClientSpace configuration for Email Integration. While the email templates (CSCDISC and CSCDISCNEW) themselves do **not** require Email Integration, the reply above the line functionality **does**. For Reply Above This Line to work, both CSCDISC and CSCDISCNEW must have a **From Email Override** address that matches an Active Email Integration mailbox. See Configuring Case Discussion: Reply Above This Line.



Field Replacement

Case Discussion templates provide replacement field functionality represented as brackets **{ }**. For a list of the fields, see Client Service Case field replacement.

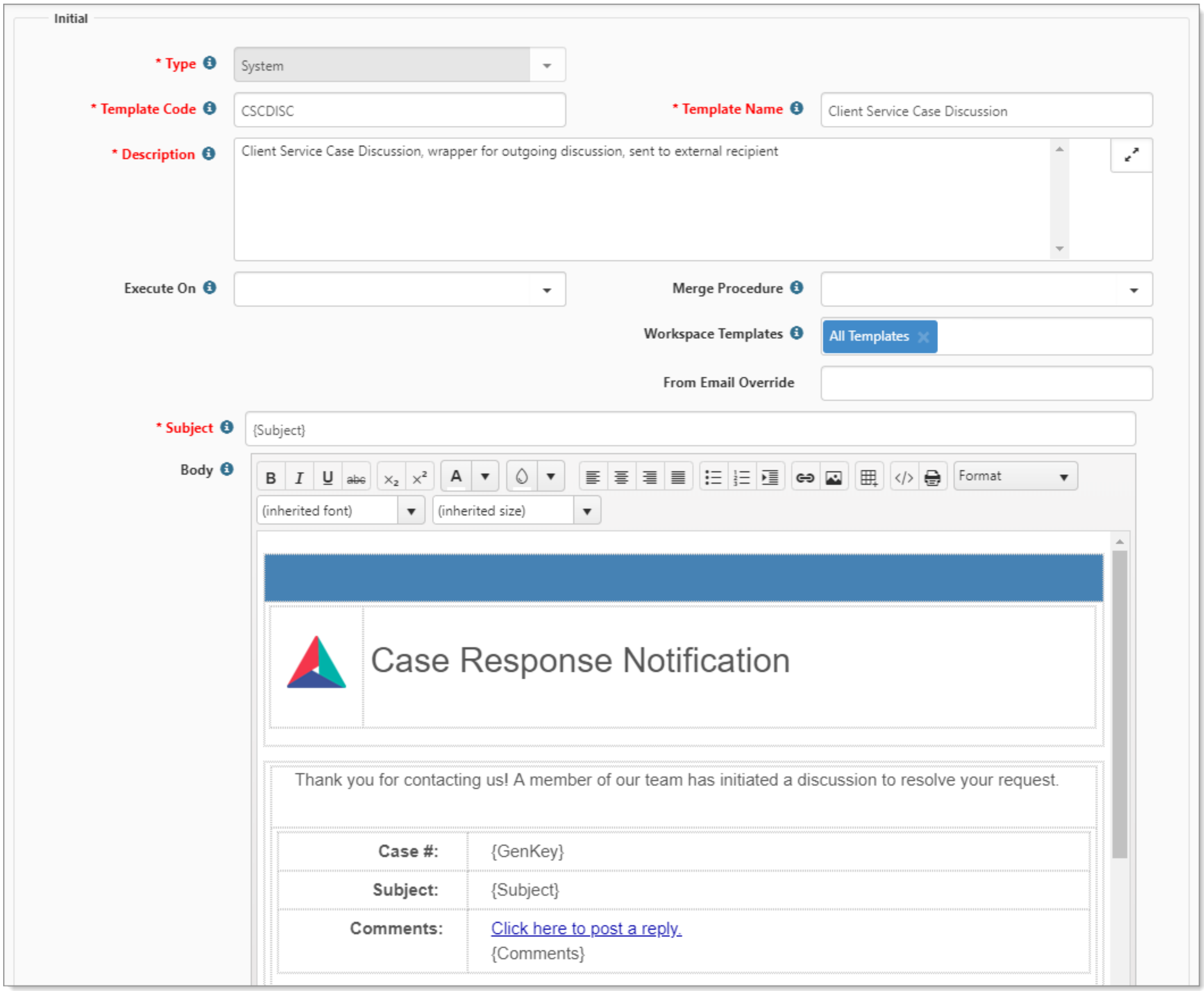
Accessing the email templates

To access the email templates:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Locate the entries that begin with **CSC**.
3. Open and edit the email template, as noted in the following procedures.

CSCDISC: Case Discussion Template

CSCDISC is the wrapper for the outgoing message to the recipients indicated on the Discussion Message. In a Discussion Message, the user can type their message in the Body section, and that content is then merged in as the Comments of this email template. Alternatively, users can select a pre-populated message from a list of CSCRPLY email templates. If one of those is selected, the body is automatically populated and then merged into the Comments of the CSCDISC email template.



The CSCDISC template is included as part of the PEO installation. The only required configuration is to customize the Body and set the value in From Email Override if you are using reply above the line functionality. See Configuring Case Discussion: Reply Above This Line.

To configure the email template for CSCDISC:

1. Complete the form fields.

Template Code	Use **CSCDISC** for this template.
Template Name	Use **Client Service Case Discussion**.
Description	Use **Client Service Case Discussion, wrapper for outgoing**

	discussion, sent to external recipient.
From Email Override	Specify an email address to override the default noreply address commonly used by the system. The default Admin Email configuration is stored in App Settings. For help configuring this setting, log an Extranet case.
Subject	Can configure using replacement fields. Is formatted as **WorkspaceName - CSC Subject Line {Subject}**. Any additional text can also be configured on this line up to the limits of the field. See Client Service Case field replacement.
Body	Body uses a rich text editor and supports font styling, embedded images, hyperlinks, lists, and tables. For best results, we recommend embedding .jpg or .jpeg images. Body contains a custom HTML table that holds appropriate field replace characters from the generated Discussion dataform and can include: • **Discussion**: Contents of the discussion Comments field. This can be dynamically altered using field replacement in the selected email template. • **Last Discussion**: Previous discussion threads comments area. • **Reply To Url**: Direct URL link to the Discussion page. • **Reply To Link**: This link automatically signs in the user using the API configuration and opens the appropriate discussion.

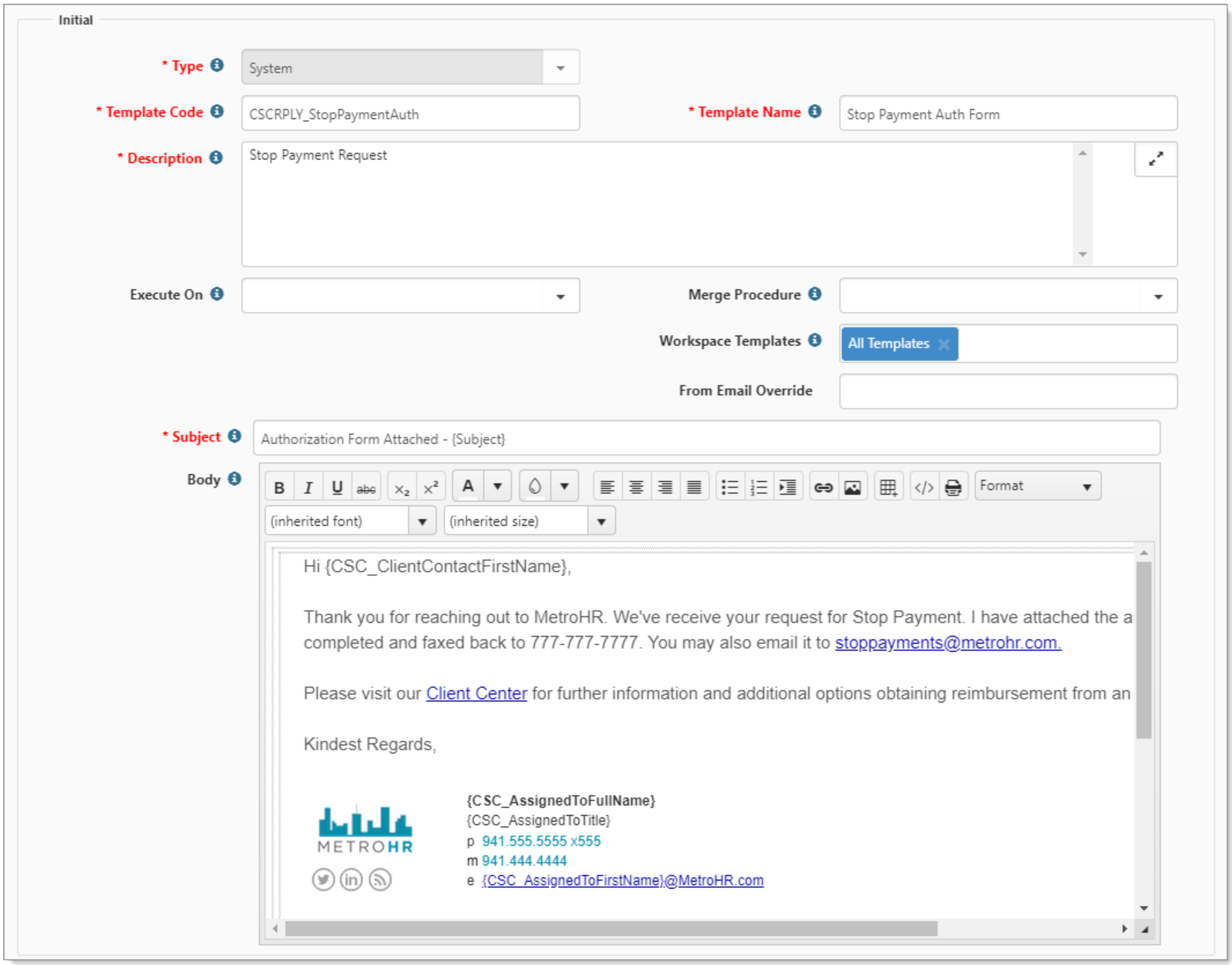
2. Click **Save**.

CSCRPLY: Case Discussion Reply Template

Use CSCRPLY to create customized reply templates for distinct categories of responses, such as an authorization form for a stop payment. These categories can be as flexible as required by the business case – from a series of 2 or 3 standard responses to specific responses for each case type. You can use a CSCRPLY template within a CSCDISC template.

The templates CSCRPLY1, CSCRPLY2, and CSCRPLY3 are included in the standard PEO installation. You can modify these templates to suit the needs of your organization. Additionally, to further customize your template, you can add attachments to be included in Case Discussion replies and also display in the Case Discussion thread. For example, let's say you have a template named

CSCRPLYPayrollProblem that you use for a generic payroll form that an employee or manager must complete. Attaching the form to the template saves time and streamlines the process.



To configure the email template for CSCRPLY:

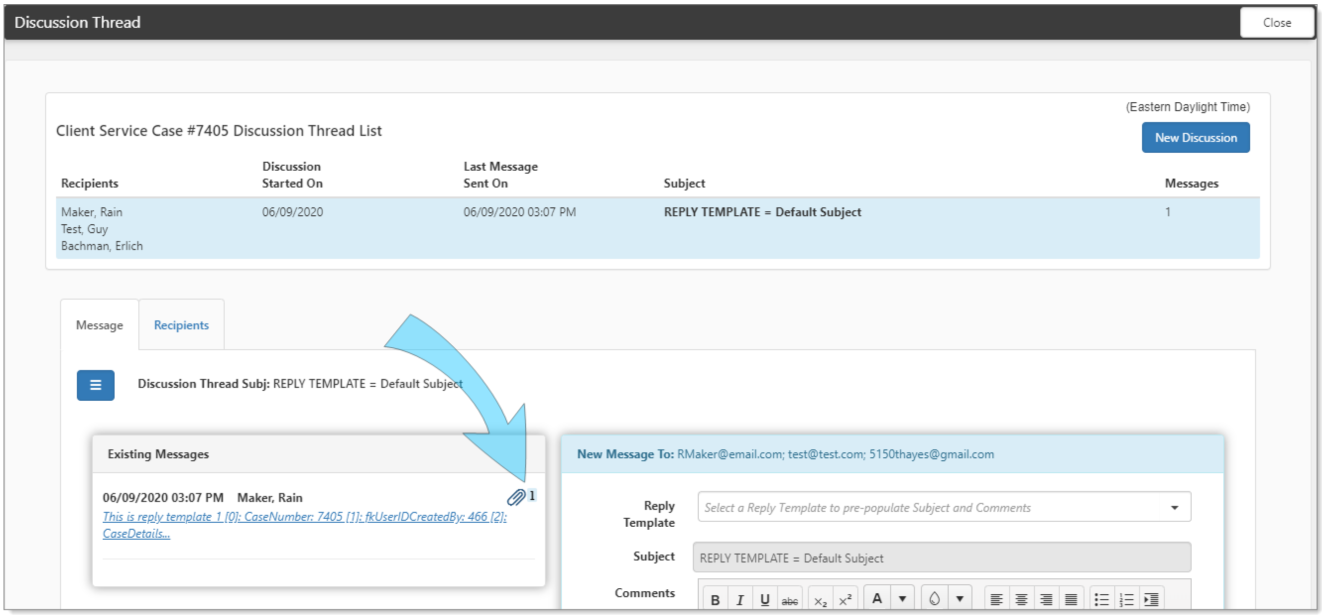
1. Complete the form fields.
   If you are adding a CSCRPLY template, for Type, select **System**.

Type	Select **System**.
Template Code	Template code must begin with **CSCRPLY** and must be unique. Can be up to 100 characters in length.
Template Name	Configure to suit business requirements. Displays when selecting Reply

	Template from the internal discussion.
Description	Configure to suit business requirements.
From Email Override	Specify an email address to override the default noreply address commonly used by the system. The default Admin Email configuration is stored in application settings. For help configuring this setting, log an Extranet case.
Subject	Can configure using replacement fields. Formatted as **WorkspaceName - Template Subject Line**. Any additional text can also be configured in this line up to the limits of the field.
Body	Body uses a rich text editor and supports font styling, embedded images, hyperlinks, lists, and tables. For best results, we recommend embedding .jpg or .jpeg images. Use the HTML editor controls to customize each reply template. You can also use field replacement to enhance customization. See Client Service Case field replacement.

2. To add attachments, expand **Attachments**, and click ✚.
   The Upload File dialog box opens.
3. Click **Choose File** to upload a file, and then click **Save**.
4. To save your changes and close the template, click **Save**.

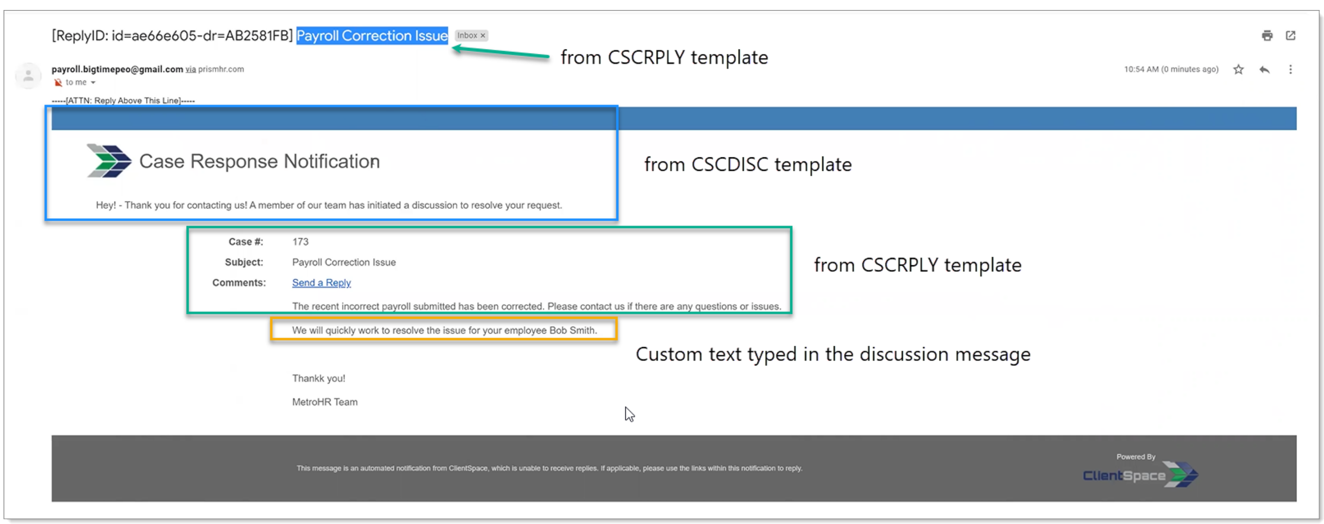
When viewing the Discussion Thread, a counter indicates if any attachments are present.



How the templates work together

The following image shows how CSCDISC and CSCRPLY work together. Additionally, we also show you how your custom text is added from the discussion message.

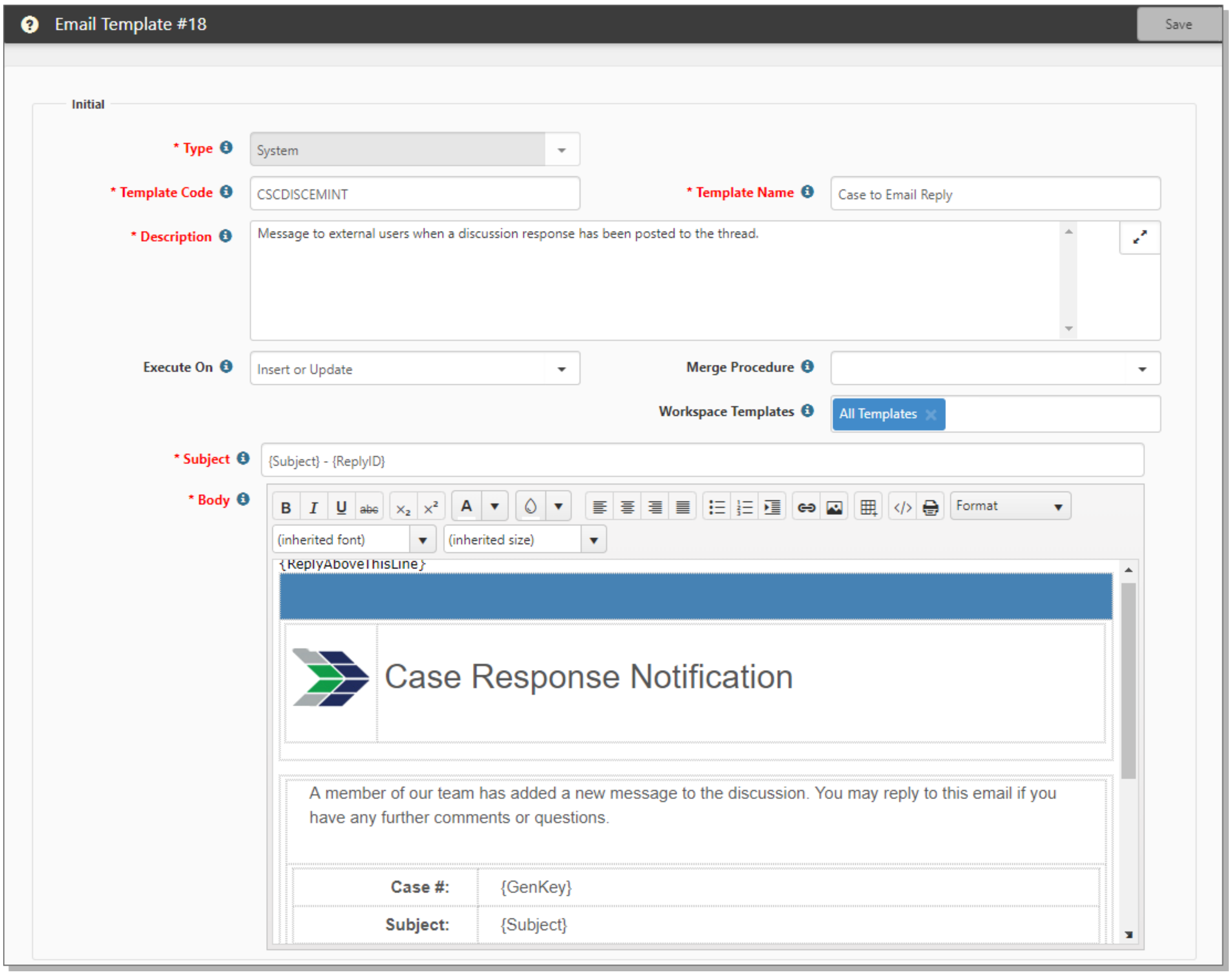
- CSCDISC is the standard template
- CSCRPLY is the reply template
- The customized message entered in the discussion New Message box appears below the reply template content.



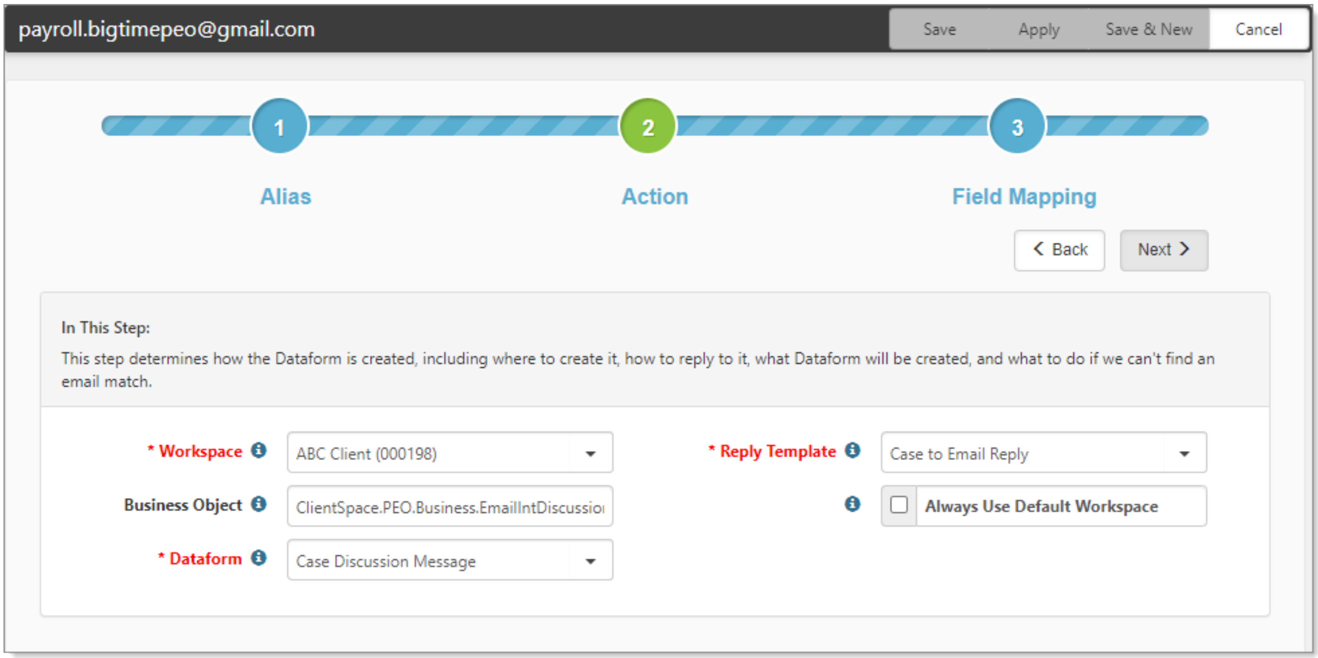
CSCDISCEMINT: Case to Email Reply

CSCDISCEMINT is the message to external users when a discussion response has been posted to the thread.

If the CSCDISCEMINT email template is unpublished, the system will send out a standardized response stating: "Your ClientSpace Email Request has been received and processed. This is an automatically generated email. Please do not reply." The CSCDISCEMINT template is part of the standard PEO package.



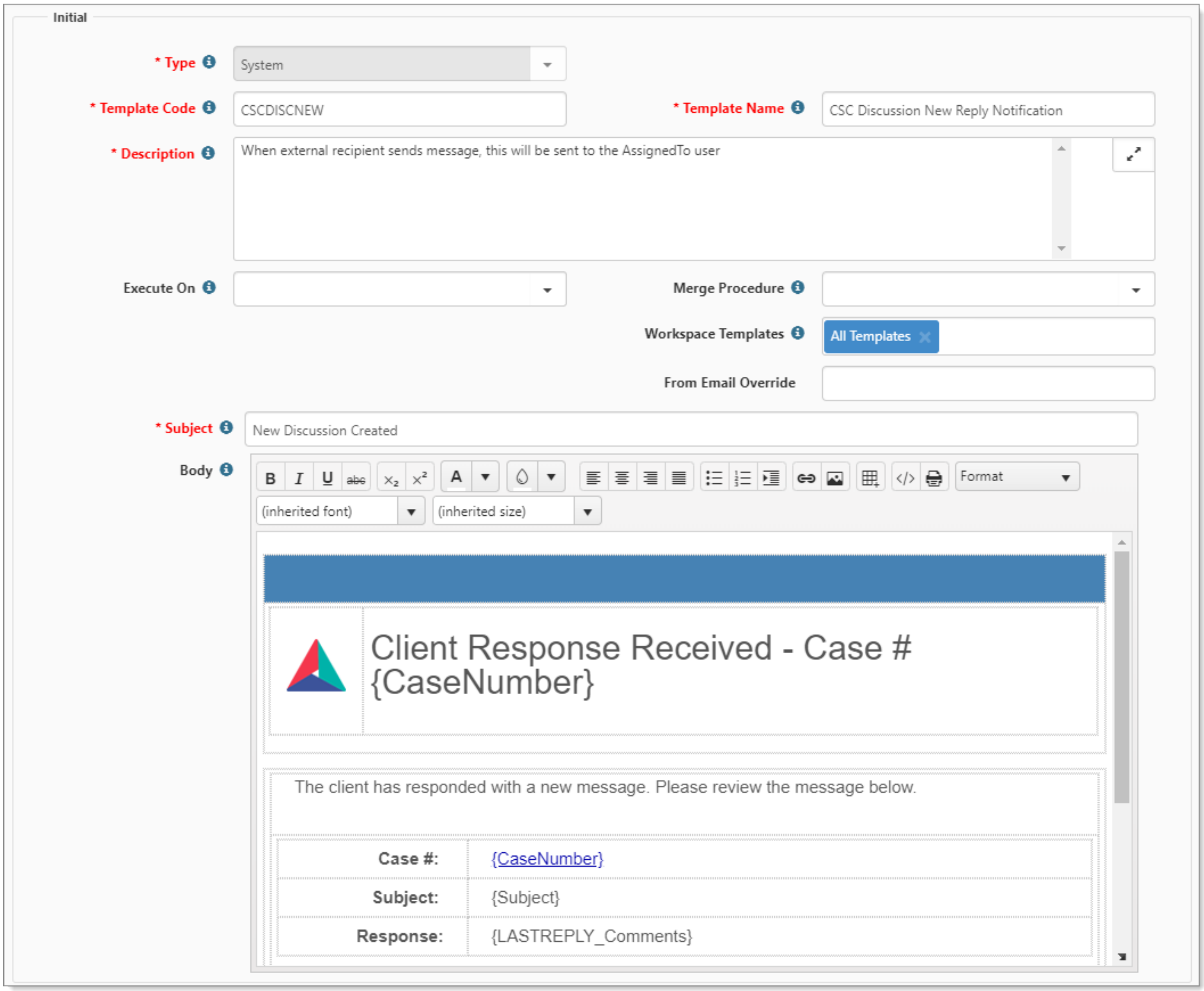
This template is referenced in the Email Integration record, in the Action step. The template is included in the standard PEO installation.



CSCDISCNEW: Case Discussion New Template

CSCDISCNEW is used when a recipient replies to the Case Discussion. CSCDISCNEW is the email template and wrapper that is used for the **response** to the Assigned To user's mailbox. CSCDISC is the template that acts as a wrapper for the **discussion recipients**. Both templates can either:

- Act as the email content if no reply template is selected in the discussion OR
- Act to wrap the content of the selected reply template should the user completing the discussion select a reply template



CSCDISCNEW is included with a standard PEO installation.

To configure the email template for CSCDISCNEW:

1. Complete the form fields.

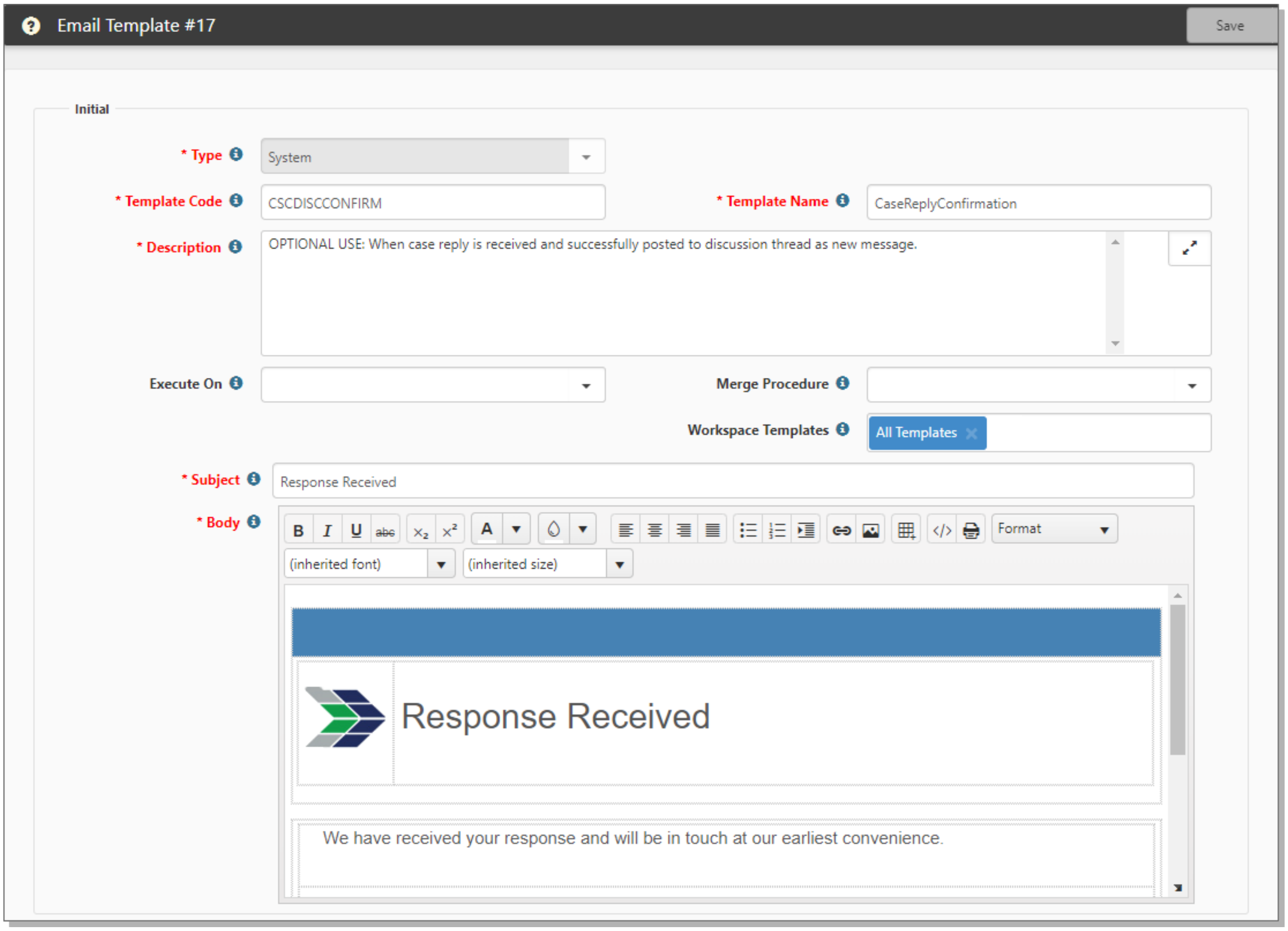
Template Code	Use **CSCDISCNEW** for this template.
Template Name	Use **CSC Discussion New Reply Notification**.
Description	Use **When external recipient sends a message, this is sent to the AssignedTo user**.

From Email Override	Specify an email address to override the default noreply address commonly used by the system. The default Admin Email configuration is stored in App Settings. For help configuring this setting, log an Extranet case.
Subject	Use **New Discussion Created**. This is the subject line of the inbound email, which can be configured.
Body	This is the contents of the inbound message. Body can be configured using field replacement of {LASTREPLY_Comments} and should be included to capture the response from the external user in the discussion. Body uses a rich text editor and supports font styling, embedded images, hyperlinks, lists, and tables. For best results, we recommend embedding .jpg or .jpeg images.

2. Click **Save**.

CSCDISCCONFIRM: Case Reply posted to discussion thread

Case Reply Confirmation. Use this template to indicate that a response was received. The case reply is received and successfully posted to the discussion thread as a new message.



Client Service Case field replacement

Fields with **{ }** indicate that you can use field replacement. Any of the following fields are available for decode when constructing an email reply template.

{CaseNumber}	{fkUserIDCreatedBy} Created By
{CaseDetails} This is a fieldset.	{CreateDate}
{CreateTime}	{EscalationDate} Level 1 Escalation Date
{EscalationTime} Level 1 Escalation Time	{Escalation2Date} Level 2 Escalation Date
{Escalation2Time} Level 2 Escalation Time	{crCategory}

{ResolutionDate}	{CaseAssignment}
{ResolutionTime}	{fkCaseTypeID} Case Type
{fkUserIDAssignedTo}	{fkContactIDClientContact} Client Contact
{PhoneNumber}	{CallerName}
{IncludeinNotification}	{luStatus}
{EmailAddress}	{CaseAudit}
{luPriority}	{DueDate}
{BrokerContact}	{fkEmployeeID}
{Subject}	{CaseInfo} This is Description.
{Resolution}	{InternalNotes}
{CaseNotes}	{CommunicationMethod}
{luClientSatisfied}	{hasNotificationsDisabled}
{HoursToComplete}	{GenKey} This is ID of the current case record.
{RowGUID}	{IsActive}
{fkProjectID}	{_GenKey}
{DateCreated}	{DateUpdated}
{ImportID}	{_UpdatedByUserNameDecode}
{_RowDecode}	{AttributeTableName} Name of the table, such as gen_ClientServiceCase.
{pkClientServiceCaseID}	

The following fields are also decoded.

{Org_Name}	{Org_Address1}
{Org_Address2}	{Org_City}
{Org_State}	{Org_Zip}

{CSC_DateCreated}	{CSC_DateUpdated}
{CSC_UpdatedByFullName}	{CSC_UpdateByFirstName}
{CSC_UpdateByLastName}	{CSC_CaseNumber}
{CSC_TimeCreated}	{CSC_Escalation2Date}
{CSC_Escalation2Time}	{CSC_EscalationDate}
{CSC_EscalationTime}	{CSC_CreatedByFullName}
{CSC_CreatedByFirstName}	{CSC_CreatedByLastName}
{CSC_ResolutionDate}	{CSC_ResolutionTime}
{CSC_BrokerFullName}	{CSC_BrokerFirstName}
{CSC_BrokerLastName}	{CSC_CommunicationMethod}
{CSC_Category}	{CSC_DueDate}
{CSC_ClientContactFullName}	{CSC_ClientContactFirstName}
{CSC_ClientContactLastName}	{CSC_EmployeeFullName}
{CSC_EmployeeFirstName}	{CSC_EmployeeLastName}
{CSC_AssignedToFullName}	{CSC_AssignedToFirstName}
{CSC_AssignedToLastName}	{CSC_AssignedToTitle}
{CSC_Status}	{CSC_Priority}
{CSC_Phone}	{CSC_Resolution}
{CSC_Issue}	{CSC_Subject}
{CSC_CaseType}	{CSC_FormLabel}

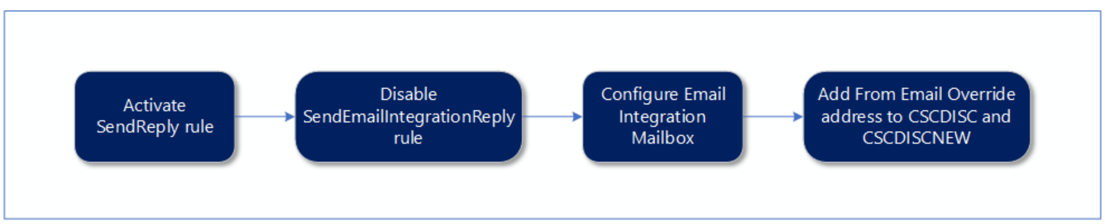
Configuring Case Discussion: Reply Above This Line

The Reply Above This Line functionality is an optional method for replying to case discussion messages. The reply is through the email mailbox Reply button, as you would normally reply to any email message. When you type the response and send it, the message is integrated with the ClientSpace case discussion thread.

The Reply button method is more direct than that of the original method, Send a Reply link, which is embedded in the email message. Both methods are shown in the accompanying image. The Send a Reply link is always available and does **not** require additional configuration. However, using the Reply button **requires** an Email Integration record with a mailbox address that matches the From Email Override address in the CSCDISC and CSCDISCNEW email templates.

The accompanying diagram illustrates an **overview** of the configuration steps for using the Reply button.

Reply button



The first step is to activate a rule and disable an older rule. Next you will configure the Email Integration mailbox. Then you add the Email Override address. The configuration steps for using the Reply button follow.

Step 1: Configure the rules

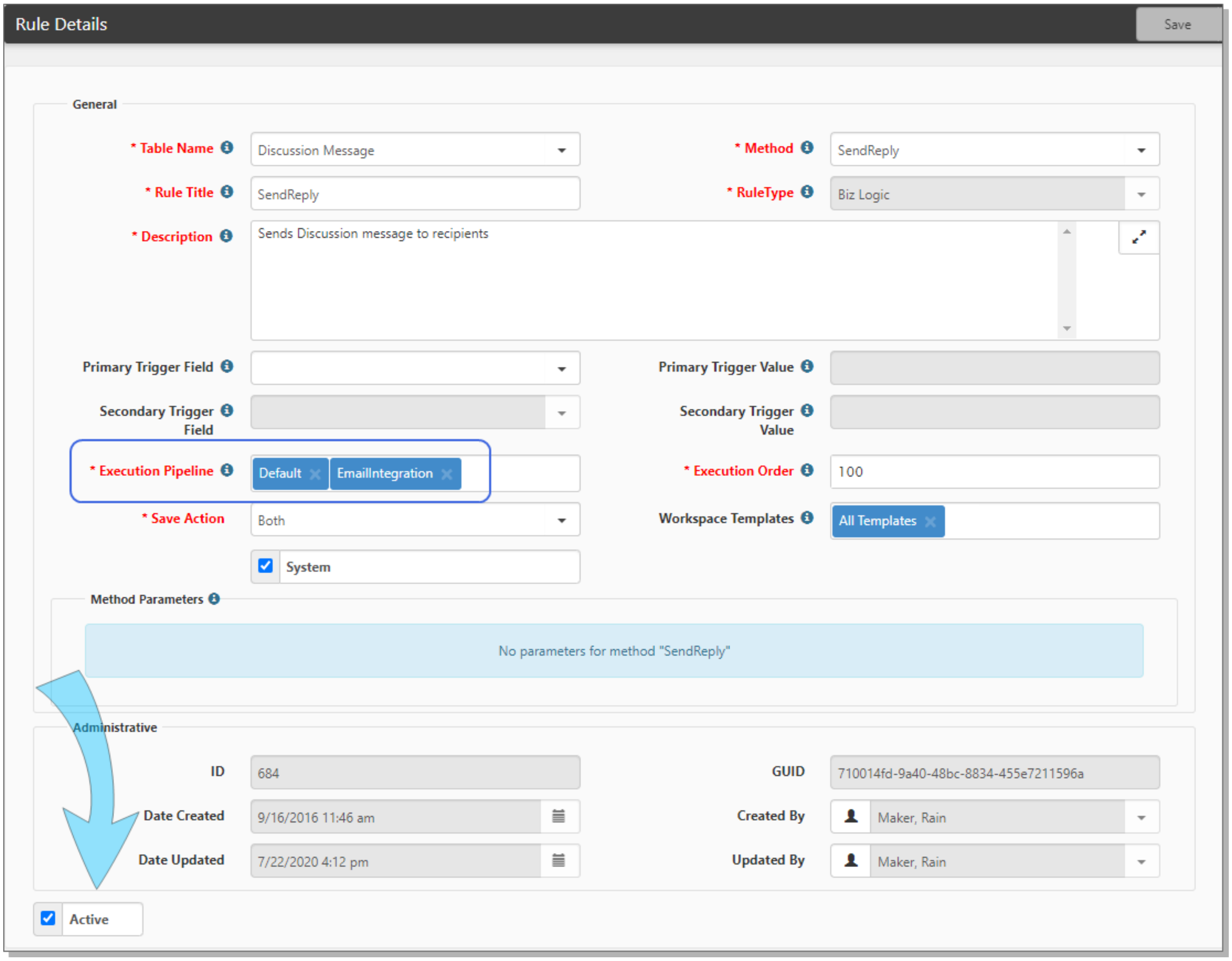
In this step, let's **activate** SendReply and **disable** SendEmailIntegrationReply. SendEmailIntegrationReply is an older rule that has been replaced with SendReply.

To activate SendReply:

1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. Filter the list for the Table Name **Case Discussion Message** with the Rule Title **SendReply** and click (**Jump**).
   The Rules Detail form opens.
3. Complete the fields:

Execution Pipeline	Select **Default** and **EmailIntegration**.
Active	Select this option to enable the rule.

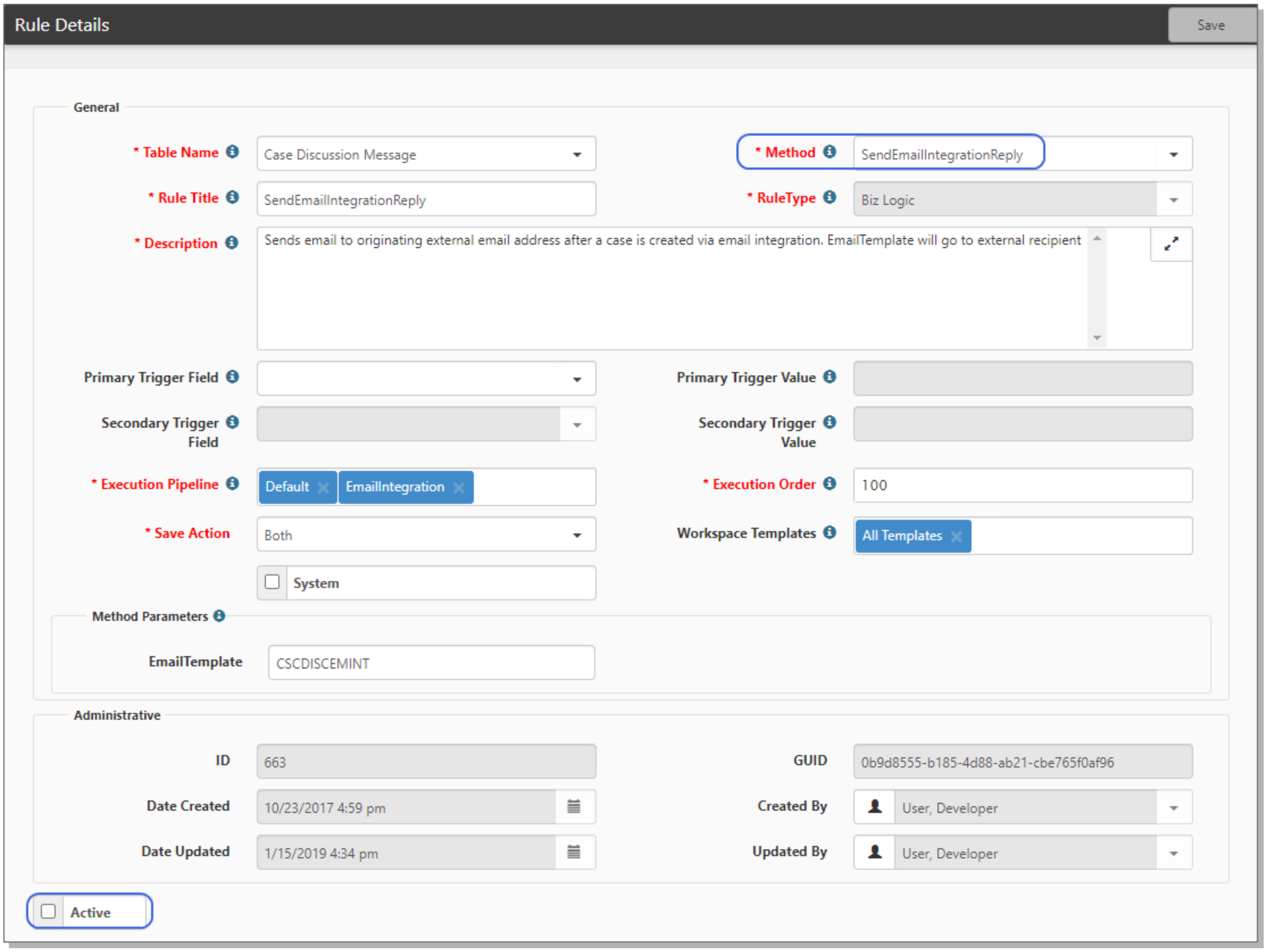
4. Click **Save**.



Next, you must disable SendEmailIntegrationReply.

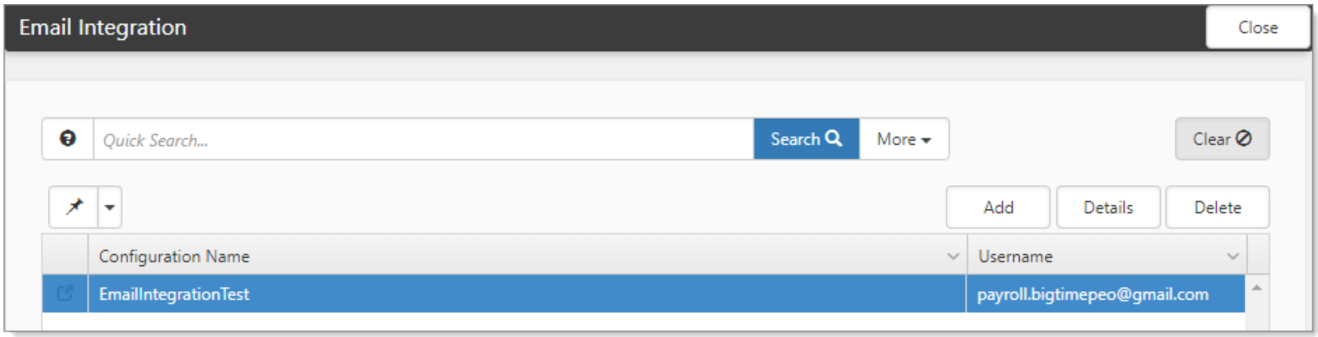
To disable SendEmailIntegrationReply:

1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. Filter the list for the Table Name **Case Discussion Message** with the Rule Title **SendEmailIntegrationReply** and click (**Jump**).
   The Rules Detail form opens. If you cannot find the rule, it may be archived. In **More Search**, select **All** and click **Search**.
3. Clear the **Active** option (disables the rule). See the following image.
4. Click **Save**.


Rule Details
Save
General
* Table Name
Case Discussion Message
* Method
SendEmailIntegrationReply
* Rule Title
SendEmailIntegrationReply
* RuleType
Biz Logic
* Description
Sends email to originating external email address after a case is created via email integration. EmailTemplate will go to external recipient
Primary Trigger Field
Primary Trigger Value
Secondary Trigger Field
Secondary Trigger Value
* Execution Pipeline
Default
EmailIntegration
* Execution Order
100
* Save Action
Both
Workspace Templates
All Templates
System
Method Parameters
EmailTemplate
CSCDISCEMINT
Administrative
ID
663
GUID
0b9d8555-b185-4d88-ab21-cbe765f0af96
Date Created
10/23/2017 4:59 pm
Created By
User, Developer
Date Updated
1/15/2019 4:34 pm
Updated By
User, Developer
Active

Step 2: Configure the Email Integration Mailbox

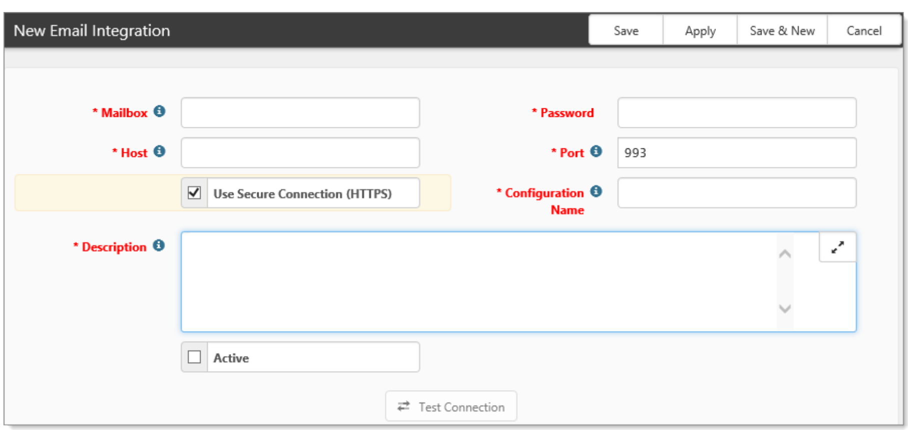
The Email Integration record is where you configure the mailbox for routing the discussion messages. The email address for the mailbox is also set in the case discussion email templates CSCDISC and CSCDISCNEW.



Our example shows a mailbox with a Username payroll.bigtimepeo@gmail.com. We will refer to this email address in the next step.

To configure the mailbox:

1. Go to **System Admin** > **Email Integration**.
   The Email Integration dashboard opens.
2. Click **Add**.
   The New Email Integration form opens.



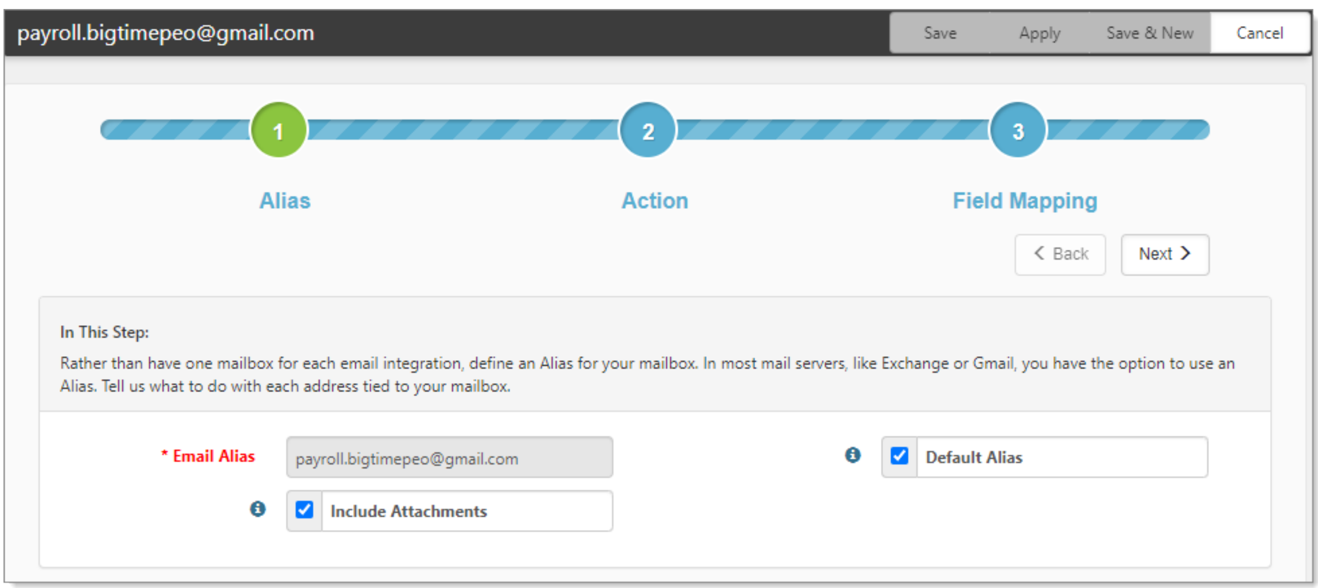
3. Complete the form fields.

Mailbox	Required. The email address for the email account with which you

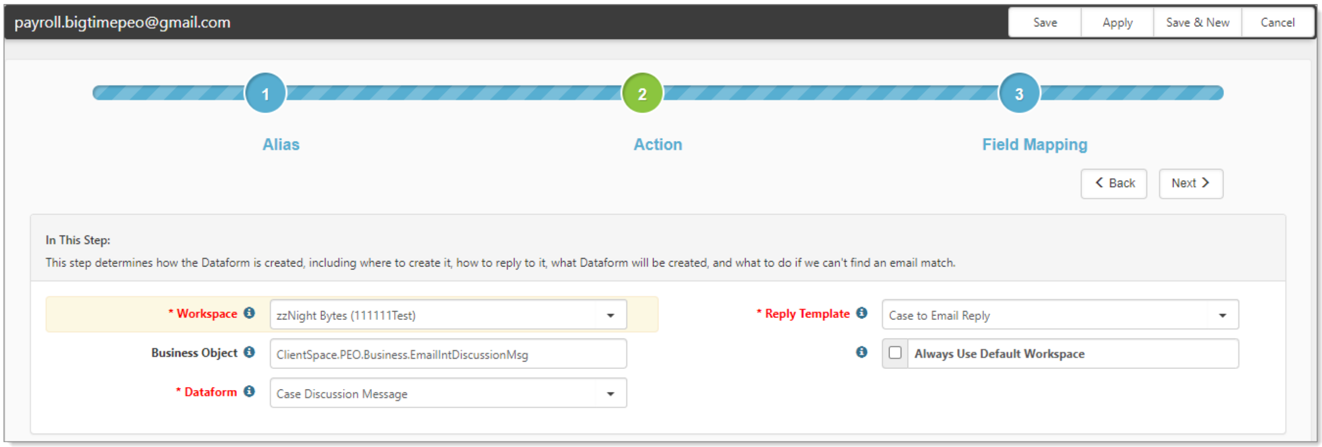
	would like to integrate. Email addresses are case insensitive and must be in a valid format. This address must be attached to a supported email provider (such as Gmail, AOL). The address must be an actual email address associated with this mailbox and not an alias for the mailbox. Later in the configuration process, an email alias is created using this email address. The alias provides to ClientSpace the default values for the workspace, project type, and client.
Password	Required. The user account password. Depending on the email provider, this field may be case sensitive, so ensure that you use the appropriate case when you enter the value. When editing an existing credential, the Password field is hidden. To change the password, see Edit a credential.
Host	Required. The IMAP mail host for the mail client. This setting is used when connecting to the mailbox. For information on your IMAP host settings, contact your mail provider.
Port	Required. The secured firewall port used by your provider to allow access to the mailbox. Most IMAP providers use Port 993, so we default the field to this.
Use Secure Connection (HTTPS)	Connect to the mail provider over the internet via unsecured (HTTP) or secured (HTTPS) access. Defaults to selected (secured).
Configuration Name	Required. Should contain the application name associated with the application code. This name will appear in Lists, so it should provide a hint at the mailbox association.
Description	Required. Should contain a brief description of this credential.
Test Connection	Test Connection is disabled until all required fields are completed, at which point the button color indicates it is ready for use. Select **Test Connection** to ensure the connection information connects to the mailbox successfully before proceeding to the next step. A successful test presents the message: We were able to connect to your mailbox. Unsuccessful tests yield an error message. Some examples of common

	errors and their causes: • `xm001 NO [AUTHENTICATIONFAILED] Invalid credentials (Failure)` - Bad username or password • `No such host is known` - Bad hostname • `Object reference not set to an instance of an object`. This message is more generic but is most commonly caused when a secure connection is required, and the **Use Secure Connection** option is cleared. Before deleting a credential, you must ensure that it is not associated with any email aliases, else an error will be logged.

4. Select **Active**. This enables the Email Integration.
5. Click **Apply**.
   The Alias step opens. An Email Integration record can have multiple aliases on a mailbox. The email address is how it connects to the mailbox. The alias defines what it does with the mailbox. In this step, specify the email address to match an email mailbox, such as payroll.bigtmepeo@gmail.com. You will use this email address in the email template configuration (next topic).



6. Select both options: **Default Alias** and **Include Attachments**.
7. Click **Next**.
   The Action step opens.



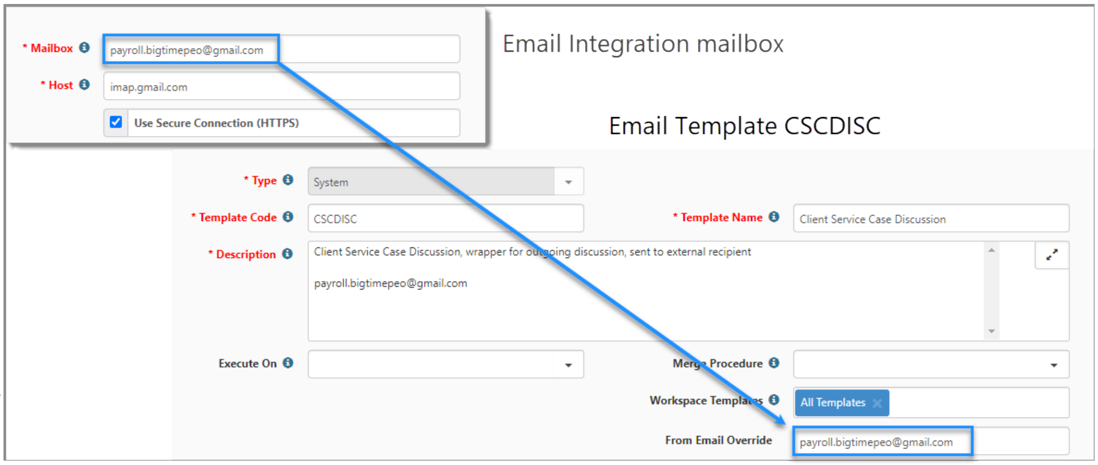
8. Complete the form fields.
   For **Business Object**, ensure that you specify **ClientSpace.PEO.Business.EmailIntDiscussionMsg**.

Workspace	Required. Contains the workspace that will be used by this email alias for the dataform creation if no matches for the sender's address are found. This is the default workspace used during the processing of the email. This value may be overridden by including the workspace in the body of the email. The override value must contain a valid workspace ID and be formatted as WSID=# with no spaces between the WSID= and the workspace ID. • Select a workspace from the list.
Reply Template	Required. Must contain the reply template to be used to send the process complete notification. Select a Reply Template from the list. This can be an existing triggered template, or you can create one just for this reply. See Configuring the Email Integration Reply Template. • For case discussions, select **Case to Email Reply**.
Business Object	Required when implementing Reply Above This Line functionality. Set the value as **ClientSpace.PEO.Business.EmailIntDiscussionMsg**. The ClientSpace.PEO.Business.EmailIntDiscussionMsg business object reads the inbound email and connects it to the appropriate discussion thread. This business object performs the heavy lifting, so it is important it is properly configured.

	If **Always Use Default Workspace** is not selected and the business object is configured, the system checks the body of the email for the CSID / WSID information. If no match is found, the system uses the Email Integration processing hierarchy to determine which workspace is used when creating the new dataform.
Always Use Default Workspace	When selected, this option forces the system to use the default workspace set in the **Workspace** field, regardless of the other methods of workspace selection.
Dataform	Required. Contains the project type associated with this email alias. This determines what type of dataform to create. Select the Project Type from the list. • For case discussions, select **Case Discussion Message**.

9. Click **Save**. You do not need to complete the Field Mapping step.

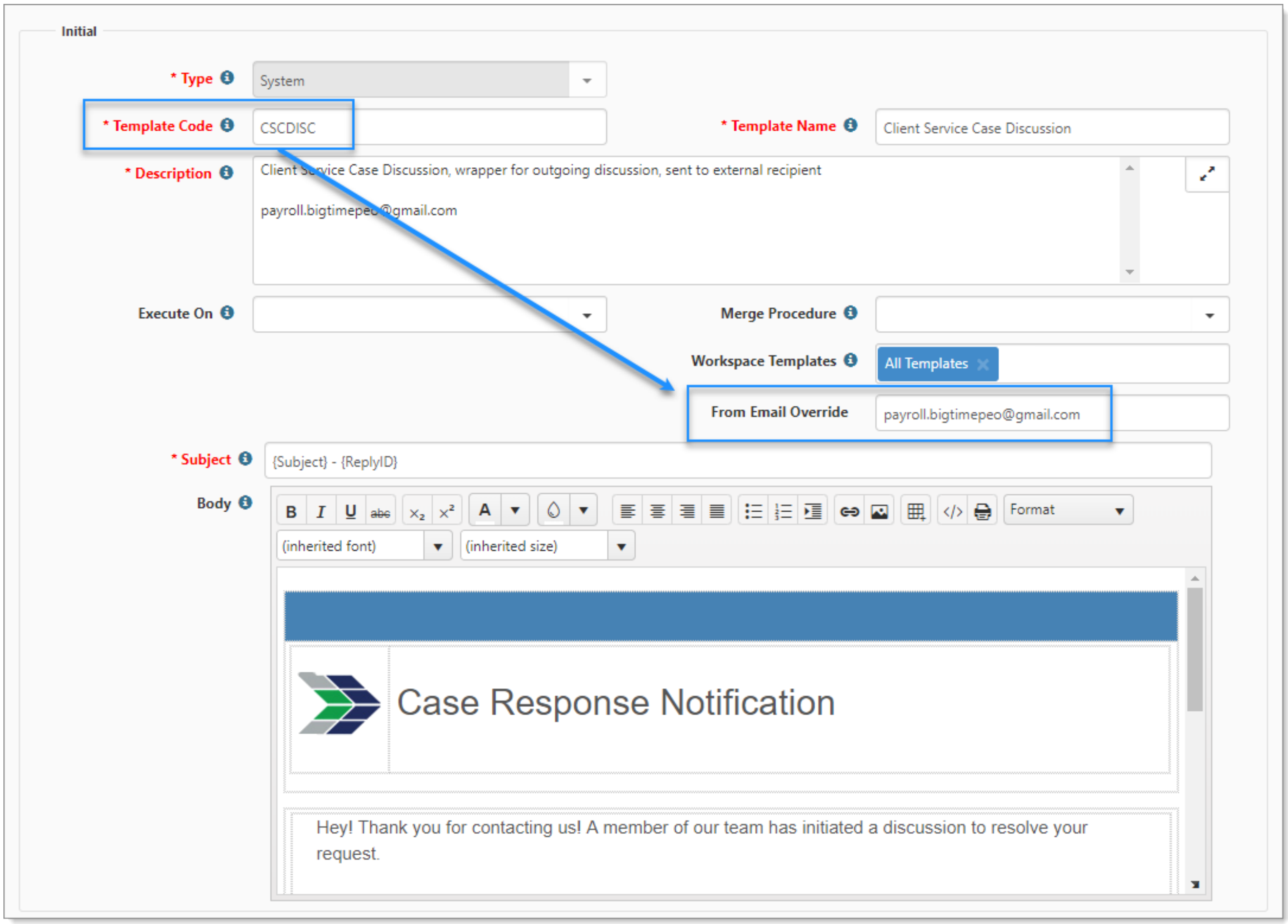
Step 3: Configure the Email Templates



The email templates for case discussions are CSCDISC: Case Discussion, CSCDISCNEW: Case Discussion New, and CSCRPLY: Case Discussion Reply. These templates are already configured for case discussions. However, you need to set a value in CSCDISC and CSCDISCNEW for the **From Email Override** address, which is the connection to the Email Integration Mailbox (see the accompanying image). The From Email Override address in the email template CSCDISC and CSCDISCNEW must match the Mailbox address that you specified in the Email Integration record. Our example uses payroll.bigtimepeo@gmail.com. In this topic, you will edit **From Email Override** in the email templates **CSCDISC** and **CSCDISCNEW**.

To configure the From Email Override:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Locate and open **CSCDISC** Client Service Case Discussion (click (**Jump**)).
   The email template opens.
3. In **From Email Override**, enter the email address that you set in the Email Integration record.
   Our example uses payroll.bigtimepeo@gmail.com.



4. Click **Save**.
5. **Repeat** the procedure for **CSCDISCNEW** and **Save**.

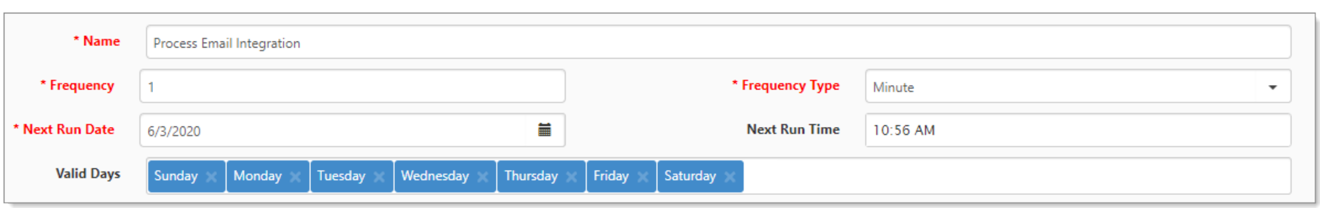
Step 4: Review the Email Integration scheduled process

The scheduled process for email integration is named **Process Email Integration**. When the scheduled process runs, it sweeps through the mailbox looking for unread messages, grabs the information such as the From and To address, and the body of the email. It then uses the Email Integration record that is related to the email address, such as payroll.bigtimepeo@gmail.com. It references the Alias and Action parts of the Email Integration record (as shown) and processes accordingly.

For case discussions, it creates a **Case Discussion Message**. The Business Object logic directs it to look for a ReplyID in the Subject line that matches a case discussion that already exists and then updates that case discussion. When a user responds, it uses the Reply Template **Case to Email Reply**.

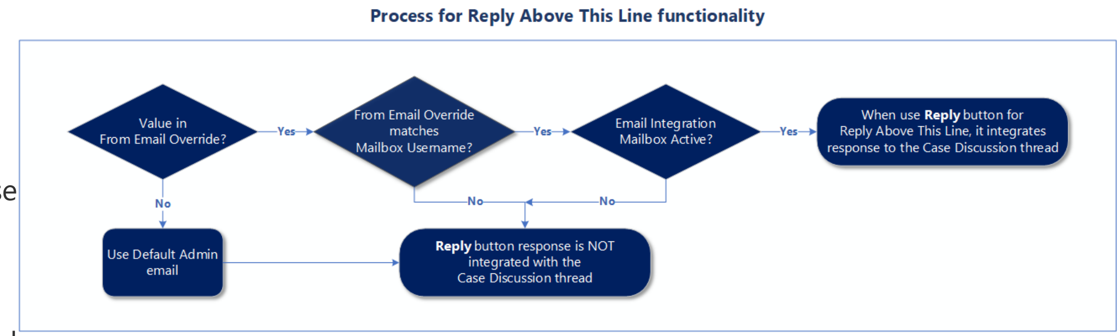
To review the scheduled process configuration:

1. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
2. Open **Process Email Integration** (click (**Jump**)).
   The Process Email Integration form opens.
3. Review the Frequency, Frequency Type, and Valid Days.
   Typically, you want this to run every minute, every day of the week.



4. For any changes, please log an Extranet case.

Reviewing how this works



This diagram illustrates the ClientSpace process to determine if case discussions are integrated into the case discussion thread when using the Reply button. This diagram shows a successful result when configuration steps are followed, and what happens if the configuration process is not followed.

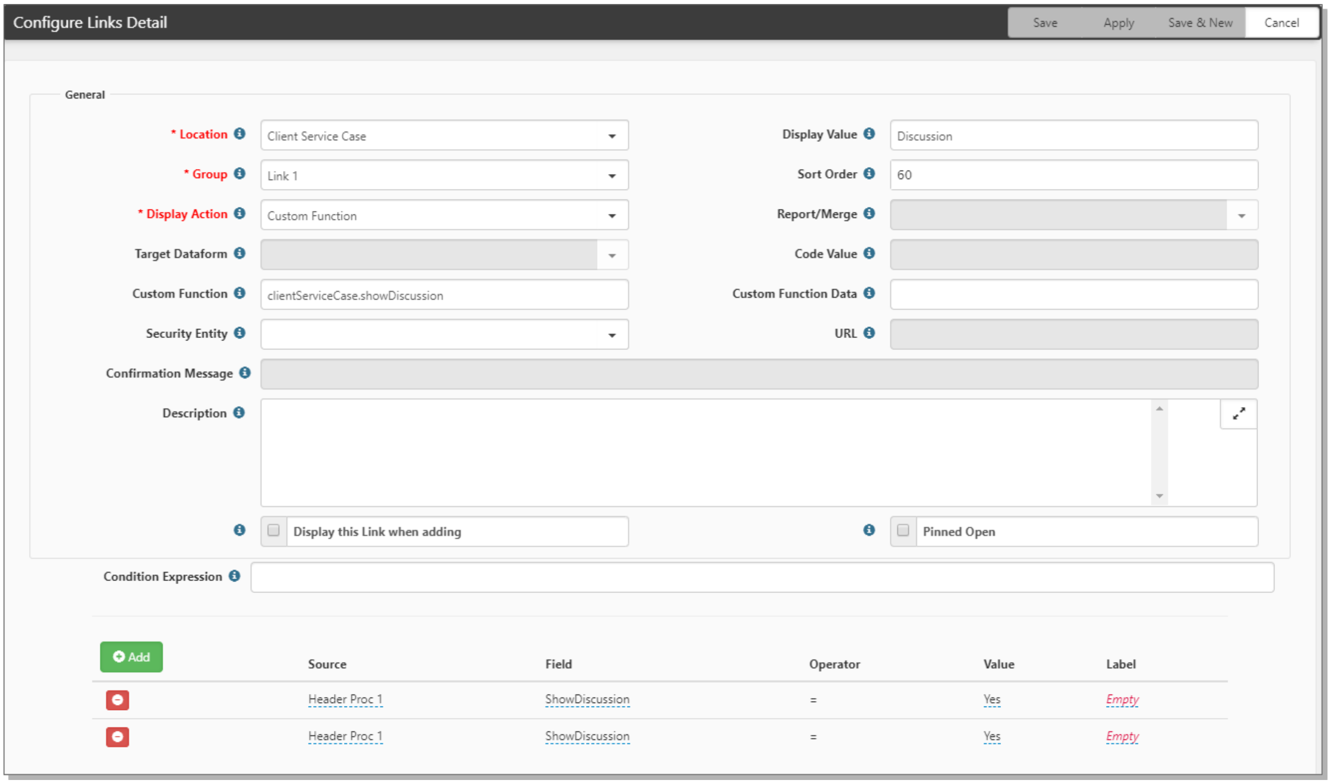
Configuring the Discussion Links

To configure the discussion links:

1. Configure the Header Proc on the Client Service Case (if not already done).
2. Configure the Dataform Links.
3. Dataform links to the Case related discussion dataform and Discussion list.

Case Related Discussion

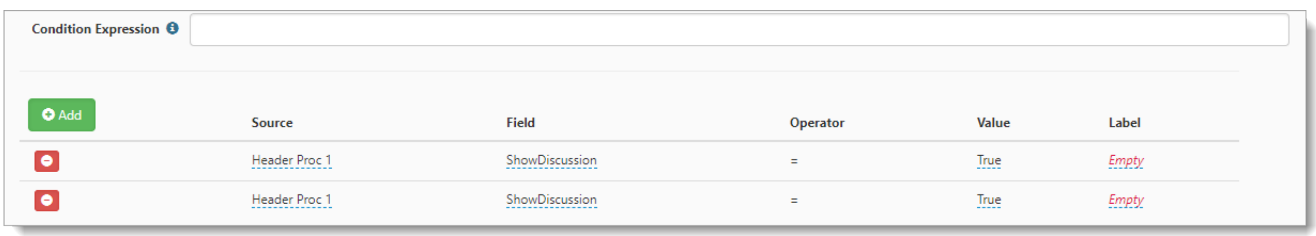
1. In **Custom Function**, type **clientServiceCase.showDiscussion**.



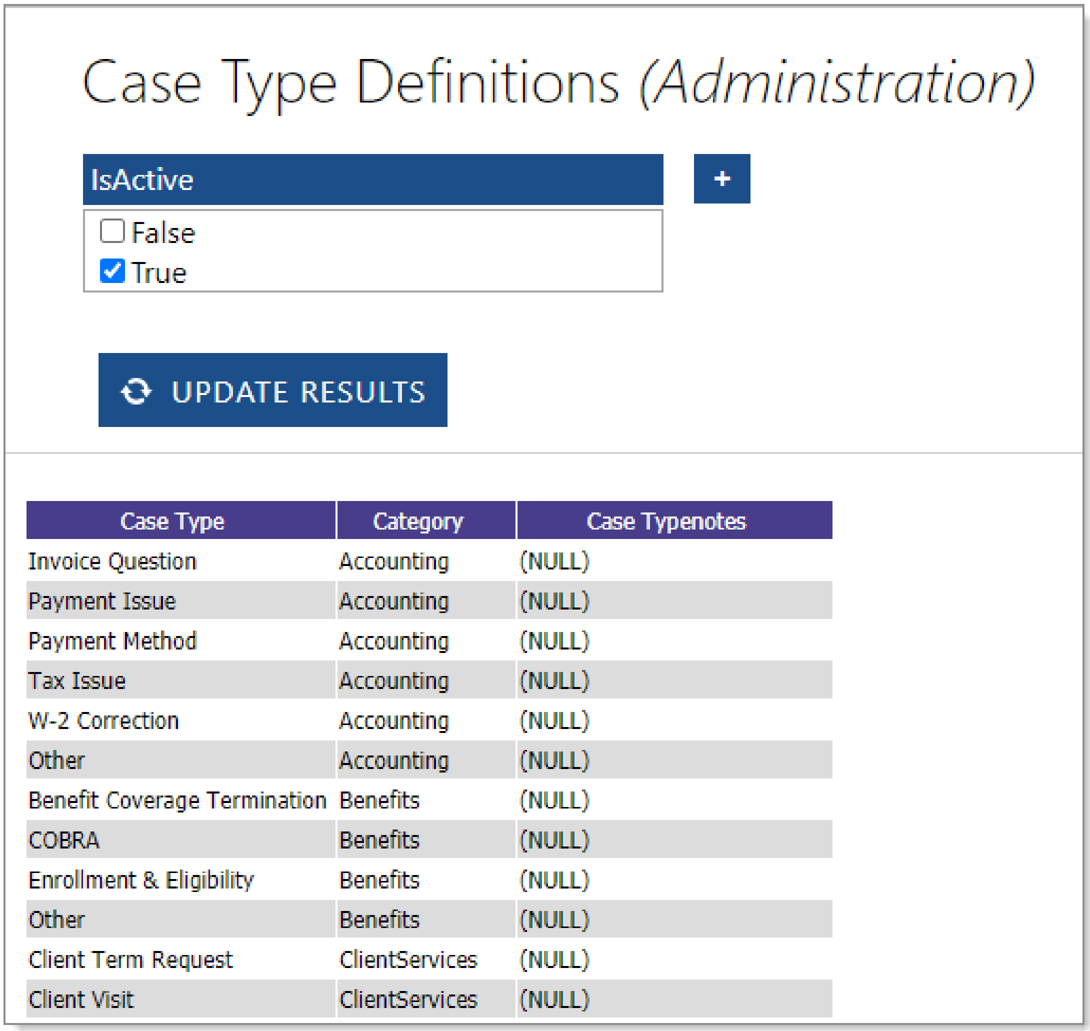
Link Display Condition

If both the Case AssignedTo user and the Associated Contract on the case have an email address:

1. Set **Show Discussion** to **True**.



Finding your case types



Case Type Definitions *(Administration)*

IsActive

- [ ] False
- [x] True

UPDATE RESULTS

Case Type	Category	Case Typenotes
Invoice Question	Accounting	(NULL)
Payment Issue	Accounting	(NULL)
Payment Method	Accounting	(NULL)
Tax Issue	Accounting	(NULL)
W-2 Correction	Accounting	(NULL)
Other	Accounting	(NULL)
Benefit Coverage Termination	Benefits	(NULL)
COBRA	Benefits	(NULL)
Enrollment & Eligibility	Benefits	(NULL)
Other	Benefits	(NULL)
Client Term Request	ClientServices	(NULL)
Client Visit	ClientServices	(NULL)

You can run a Business Intelligence (BI) report to list your organization's case types, categories, and any notes. You can run the report in BI or from the Client Service Case Details page, which can be accessed when adding or editing a Client Service Case.

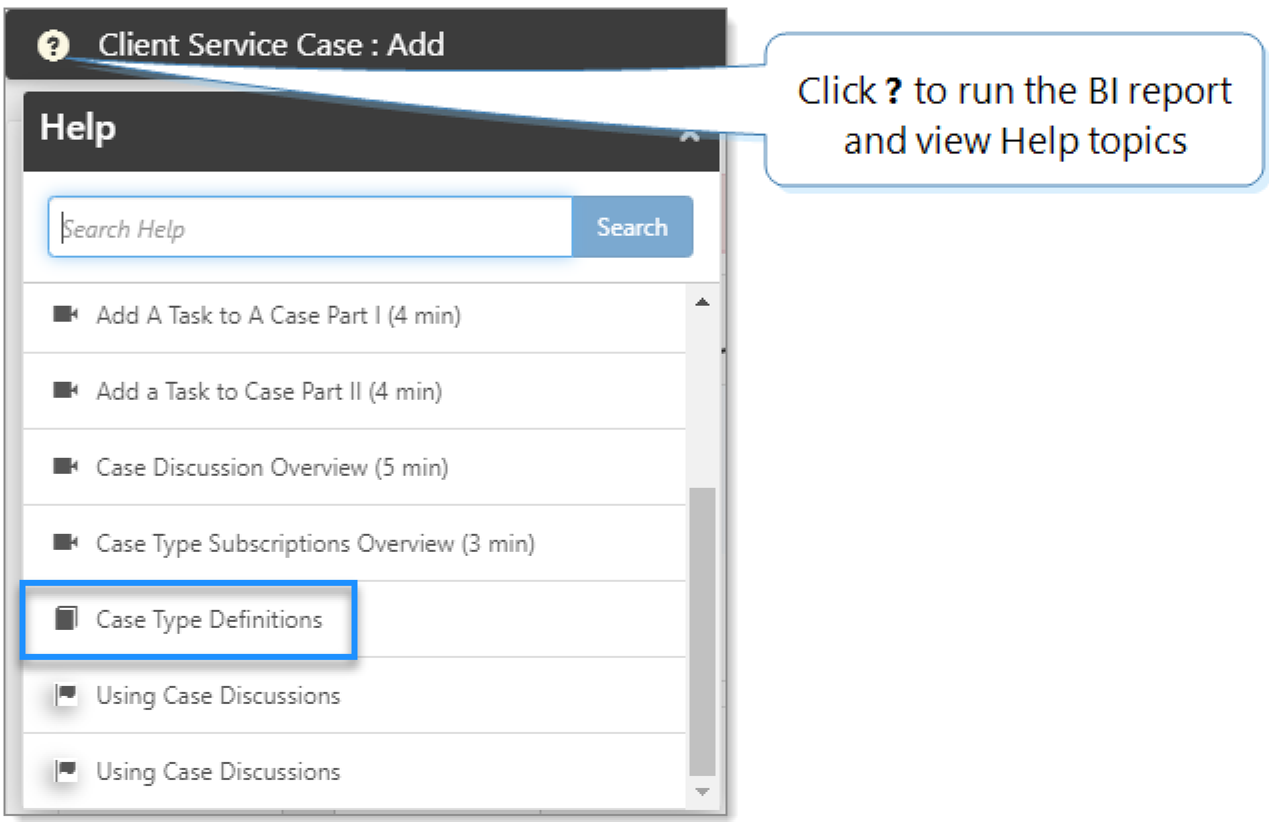
Report security: By default, all users can run the report and view the output. If changes to the report are needed, a Global Admin can save the report as a new report and make the necessary changes.

To run the report from BI:

1. On the modules bar, click **Bus Intelligence**.
   Business Intelligence opens in a new tab.
2. In the left pane, select **Administration**.
   The Case Type Definitions report appears.
3. Click **Case Type Definitions**.
   The report opens.

To run the BI report from Client Service Cases:

1. On the modules bar, go to **Workspaces**.
   The Workspace Search dashboard opens.
2. Select a Workspace and click (**Jump**).
   The Workspace opens.
3. On the **Client Service Cases** widget, click (**View Client Service Cases**).
   The Client Service Case dashboard opens.
4. To add a case click **Add**. To edit a case, click **Edit**.
   The Client Service Case form opens.
5. On the page banner, click (**Help**).
   The Help list opens.



6. In the list, click **Case Type Definitions**.
   Your BI report opens in a new tab, showing the Case Type Definitions (Administration) report.

Configuring case types

You can add case types with default values so that when your users add cases, some of the fields are all set! To add client service case types, you must be a Global Admin and assigned a role with Edit rights to the **gen_AdminCaseTypes** form. To view a list of your case types, see Finding your case types.

To add client service case types:

1. Go to **Admin Workspace**.
2. Search for *Client Service Case Type* or select **Client Service** > **Client Service Case Type**.
   The Client Service Case Type displays.
3. Click **Add**.
   The Client Service Case Type Add form opens.
4. Complete the form as required:

Default Subject	The **Default Subject** field can be used to set the Subject line for the Case Type in question on create. After this field is filled, the subject line no longer defaults. This is by design. We want to preserve any additional information that may have been added.
Default Issue	The **Default Issue** field can be used to set the Issue field for the Case Type in question on create. After this field is filled, the Issue field no longer defaults. This is by design as we want to preserve any additional information that may have been added.
Default Assignment	When you assign a case, you can specify the Default Assignment as Creator, Single User, or Client Role. • **Creator**: Defaults to the **Assigned To** user on the case, the person that creates the case • **Single User**: Defaults to the user selected in **Assigned To User** (fields change depending on the selection in Default Assignment). • **Client Role**: Enables **Assigned To Field** and **Backup Assigned To**. When you select Client Role, Assign To Field and Backup Assigned To are required. • Backup Assigned To ensures that if the selected client role is not

	completed on the Client Team dataform, the case type defaults to a meaningful value. • If the Client Team field is empty and the Backup Assigned To has not been set, the Default Assignment reverts to the Manager of the Responsible Department field on the Client Service Case Category metadata associated with the case type. The system dynamically selects the targeted user based on the Client workspace settings.

5. Click **Save**.

Video

View the video about Configuring Case Types.

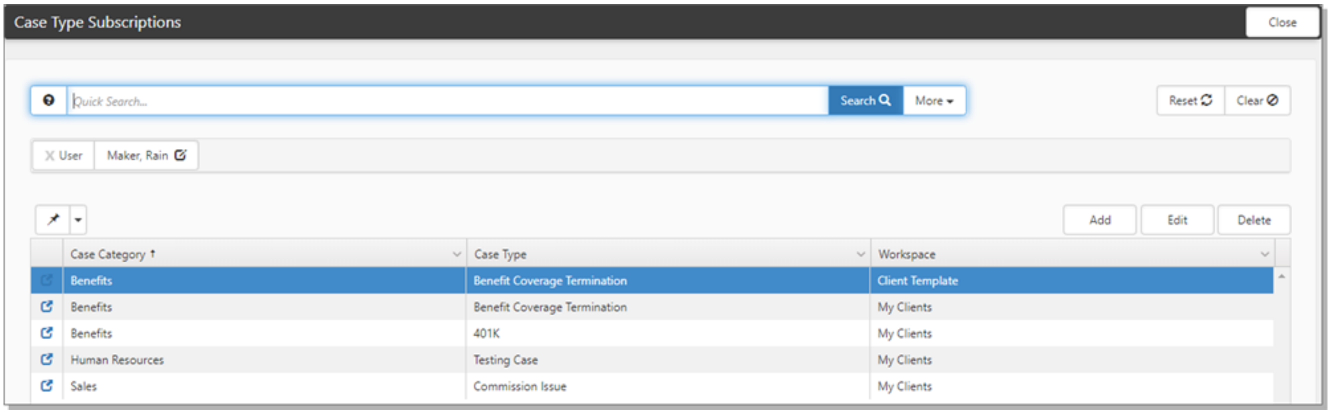
Configuring case type subscriptions

ClientSpace provides the ability to select Case Type subscriptions (within security limits), which means you can subscribe to a given case type and if you have security appropriate to see the case type you will be notified when cases of this type are created. This topic describes Case Type Subscriptions and how to manage them through the Case Type Subscriptions module.

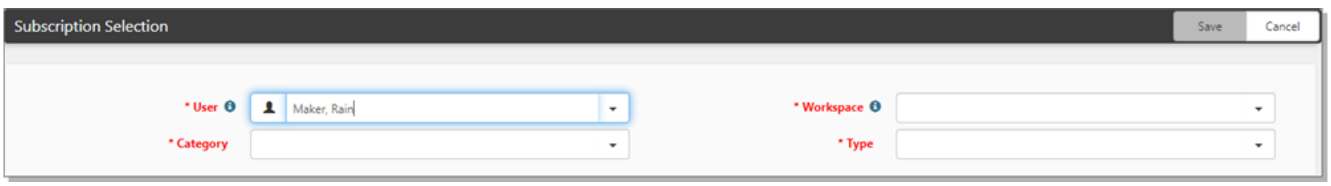
An administrative Case Type Subscriptions allows users to subscribe to specific case types either by individual workspace (filtered by the workspaces to which the selected user has access) or by selecting My Clients, which subscribes the user to the selected case type for any workspace where they are a member of the Client Team role in workspace security settings.

To configure case type subscriptions:

1. From the modules bar, select **Case Type Subscriptions**. You may need to select it from the View list.
   The Case Type Subscriptions dashboard opens.



2. Click **Add**.
   The Subscription Selection form opens.



3. Complete the form fields. All fields are required.

User	Global Admin users can either subscribe themselves in the same way or add subscriptions for other users by selecting a different user in the list. Altering user selection is limited to Global Admin users.
Workspace	This is a filtered list of workspaces for the selected user. **My Clients** subscribes to workspace where the selected user is in one of the fields on the **Client Team** dataform. Select a Workspace.
Category and Type	Select the Category and Type of case to which you would like to subscribe.

4. Click **Save**.

The Case Type Subscription follows the ClientSpace security model. Users cannot subscribe to or receive notifications for any case type to which they do not have access.

Learning how: Configuring case escalation

Responding to client requests in a timely manner can make all the difference to your clients' perception of your customer service. One way to ensure that cases are handled quickly and efficiently is through case escalations. This gives you the administrator the ability to configure cases to automatically escalate if there has been no action on a case in a specified time. This is done through case escalation.

Escalation is configured through the admin workspace and can be configured either very broadly at the category level or very granularly all way down to case type. Regardless of whether case escalation is configured at the category or case type level, escalation triggers based on updates to the case within a configured time threshold. What this means is you can set cases to escalate at different rates based on the conditions you select at the category or case type level.

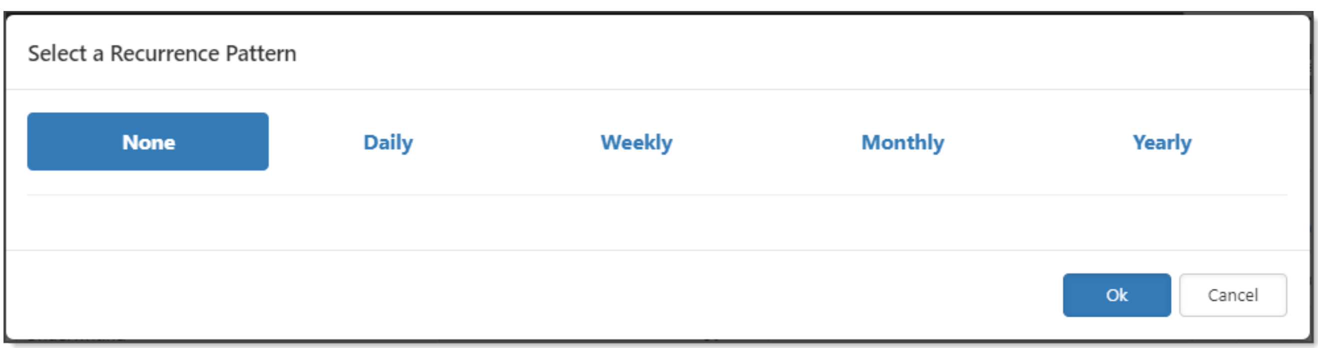
View the video about Configuring Case Escalation.

Configuring recurring tasks

You may have a task that needs to be performed repeatedly within a workspace, perhaps once a day, or once a year. You can set up recurring tasks at the workspace level to automate the process.

To configure recurring tasks:

1. Go to a workspace.
2. In the **Action Center**, expand **My Tasks,** and click **Add Task**.
   The New Task form opens.
3. Complete the task fields and click **Apply**.
4. In the Action Center, click (**Configure Recurrence**).
   The Select a Recurrence Pattern dialog box opens. You can set the task to recur Daily, Weekly, Monthly, or Yearly.

5. Complete the fields:

Interval	Every *n* days/weeks/months/years, create this task.

Start Date Offset	Start *n* days/weeks/months/years.
Due Date Offset	Due *n* days after the first day of the month/week/month/year.
Recurrence Configuration	Options vary depending on what you selected for Interval. • Daily: Weekdays Only means that the task is only created during the week. • Weekly: Select the day or days of the week. • Monthly: Select **Date of Month** or **Day of Month**. Your selection then presents **On Date of Month** or **Every** *x* Sunday, Monday Tuesday, Wednesday, Thursday, Friday, Saturday of the month (respectively).
Recurrence Pattern	Displays a synopsis of how you configured the pattern.

6. Click **Save**.

After you set a recurring pattern, it becomes read-only. To change the recurring pattern, you must delete the recurrence and reset the pattern.

Learning how: Configuring recurring tasks

To see this process in detail, view the video Configuring Recurring Tasks.

Chapter 9

Configuring ClientSpace for the Employee Support Center

The PrismHR Employee Support Center provides a portal for employee self-service for items, such as requesting vacation and reviewing benefits. The Employee Support Center allows you to set up a direct way for your worksite managers and employees to submit questions to your team. This functionality utilizes the ClientSpace Client Service Module to process those cases and allows your internal team to process requests and questions efficiently. Additionally, the Employee Support Center allows employees to submit questions that are then processed as ClientSpace Cases.

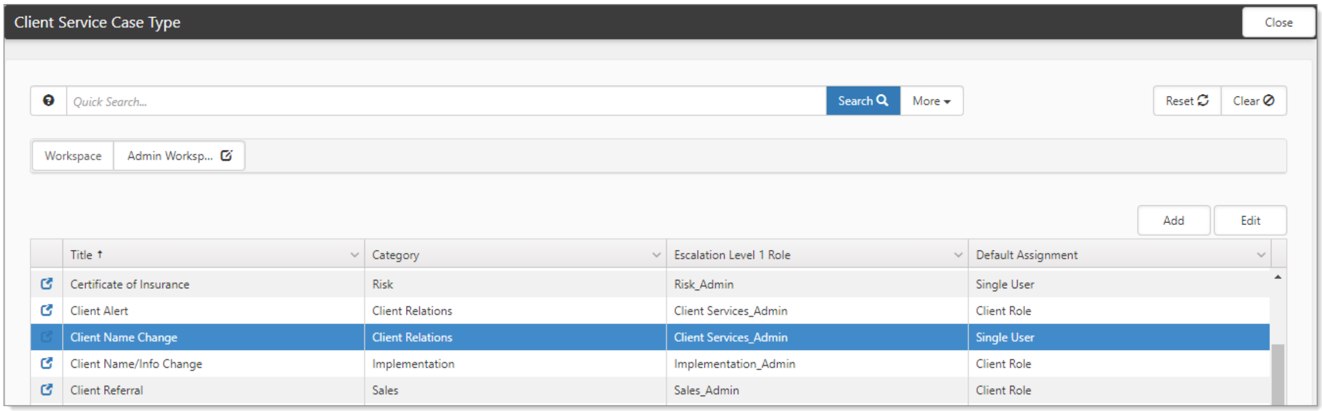
To enable the self-service functionality, you must configure the Employee Support Center and ClientSpace. This topic guides you through the ClientSpace configuration, which involves configuring the case types on the Client Team dataform for employee questions processed as Cases. To learn more about the PrismHR Employee Support Center, see the PrismHR documentation on the CRC.

Configuring Case Types

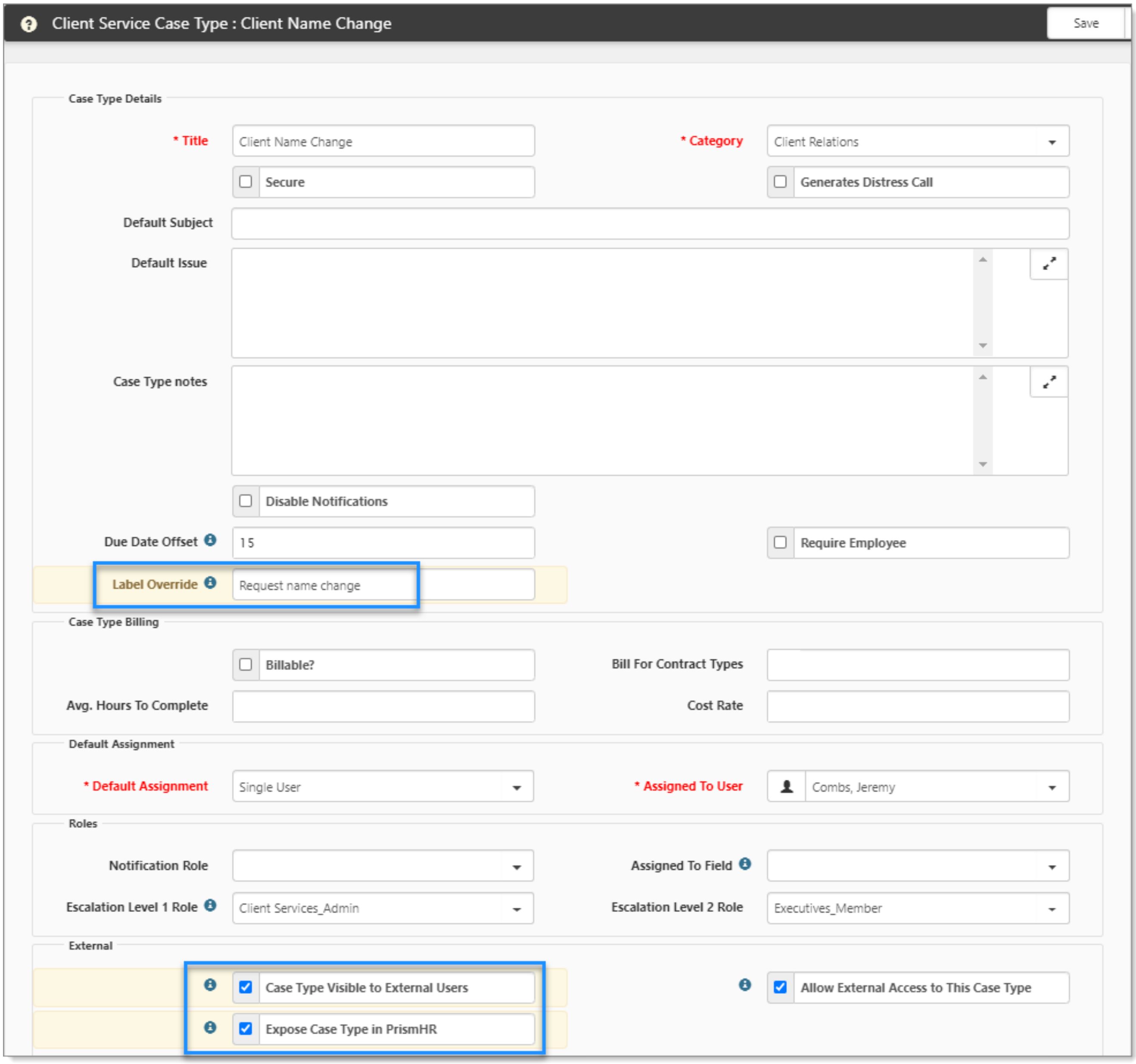
You can configure any case type to be exposed to the Employee Support Center. Case types that you enable in ClientSpace (Case Type Visible to External Users) determine what users see in the Submit a Question dialog box on the Employee Support Center. Additionally, you must enable the option Expose Case Type in PrismHR.

To configure:

1. Go to **System Admin** > **Administrative Data** > **Case Type**. In some systems, Case Type may be listed as **Client Service Case Type**.
   The Client Service Case Type dashboard opens. You can configure any case type to be exposed to the Employee Support Center.



2. Open a case type (select and click (**Jump**)).
   In our example, we selected Client Name Change.



3. Complete the form.
   Our example shows that the value for Label Override was changed to Request name change, which is what the user will see as an option when submitting a question or request. We also enabled the options Case Type Visible to External Users and Expose Case Type in PrismHR.

Case Type Visible to External Users	Enable this option to allow users to create cases for the selected type: Employee Question, General Question, and

	Manager Question. If disabled, the case type does **not** appear in the Case Type lookup on the Support Center.
Expose Case Type in PrismHR	Enable this option to allow users to select this case type on the Support Center. You can also change the displayed case type title using the Label Override field.
Label Override	Specify a different label for case type. This field applies when you enable **Expose Case Type in PrismHR**. If blank, the title of the case type is displayed.
Default Assignment	This is the person or role that you want assigned to the new case. When you select Single User or Client role, additional required fields are displayed. • **Single User**: When you select Single User, then you must also set **Assigned To User**. • **Client Role**: When you select Client Role, then you must also set **Assigned To Field** and **Backup Assigned To**. **Note**: When you enable **Expose Case Type in PrismHR**, you must select **Single User** or **Client Role**. Do **not** select Creator.
Assigned To User	When you select Single User, this field is available. Select a user from the list.
Assigned To Field	When you select **Client Role**, Assigned To Field is available. When a case of this type is created, the system looks at the Assigned To Field. If the assignment is a client team role, the system looks at the client team form to see if anyone is assigned. For example, it could look at the Account Manager field to see if there is a user. If there is no user, it will, by default, assign to the Backup Assigned To user.
Backup Assigned To	When you select **Client Role**, Backup Assigned To is available. When a case of this type is created, if the assignment is a client team role, the system looks at the client team form to see if anyone is assigned. If there

	is no user, it will, by default, assign to the backup user.
Default Subject	Leave blank. This field populates directly from the Support Center, Submit a Question.
Default Issue	Leave blank. This field populates directly from the Support Center, Submit a Question.

4. Click **Save**.

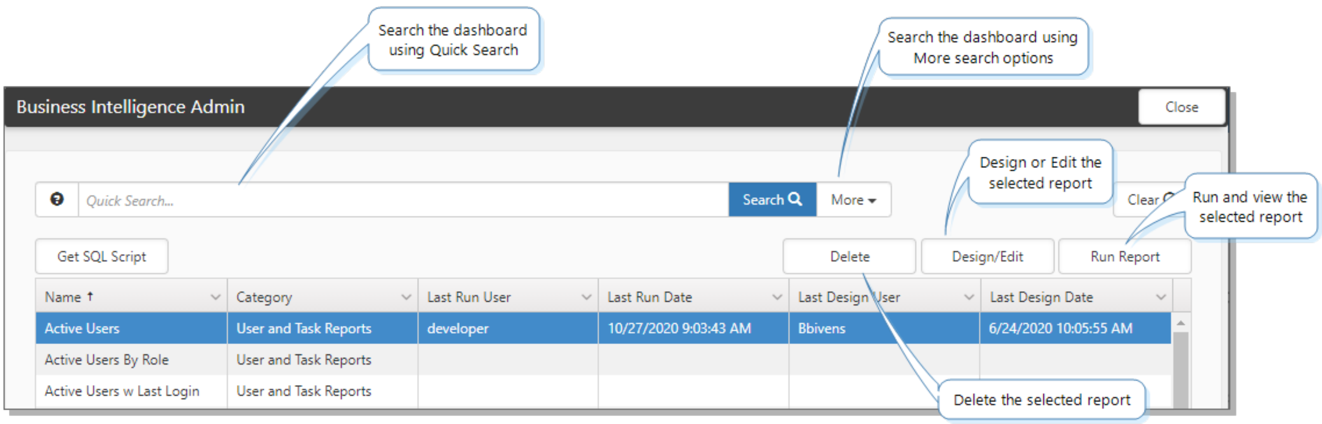
What else can you do with this?

- **Email Templates**: You can configure Email Templates for the selected Case Types to send notifications when a question is submitted through the Employee Support Center. See Email Templates.
- **Case Discussions**: You can configure Case Discussions to provide standard replies to your Employee Support Center case types and possible avenues of communication with the employee that submitted the case. See Configuring client service case discussions.

Chapter 10

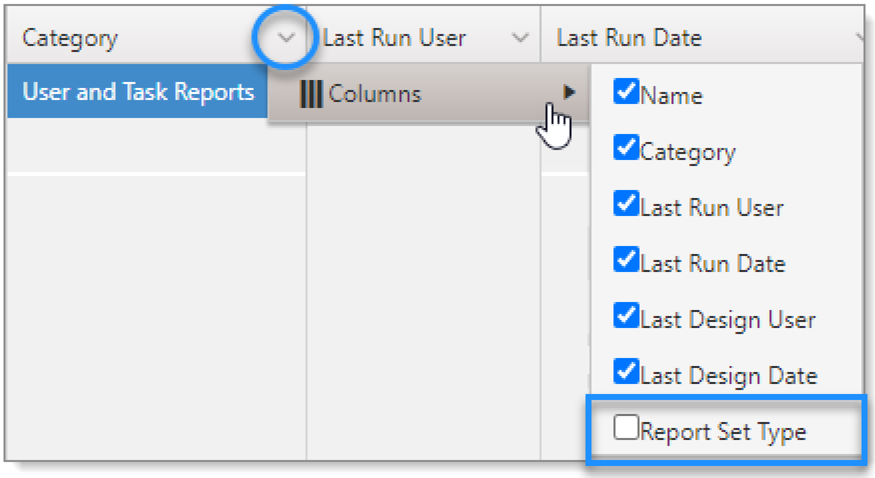
Business Intelligence Admin

The Business Intelligence Admin dashboard provides Business Intelligence functionality directly from the admin dashboard. To access this dashboard, you must be a system administrator.



To access Business Intelligence Admin:

1. Go to **System Admin** ⚙ > **Outputs** > **Business Intelligence**.
   The Business Intelligence Admin dashboard opens.
2. To search, you can do any of the following:
   - Sort by columns.
   - Use Quick Search.
   - Use More search to search by Name, Category, Report Type, XML, Last Run User and Date, and Last Design User and Date.
3. To search by Report Type, you can enable the column **Report Set Type** or use **More** search.



The Report Set Type column appears. Types are Report Dashboard, Scheduled, and Datasource.

To view reports:

- Select the report and click **Run Report**.
  The report opens in Business Intelligence, in view mode.

To edit reports:

- Select the report and click **Design/Edit**.
  The report opens in Business Intelligence, in design mode.

To delete reports:

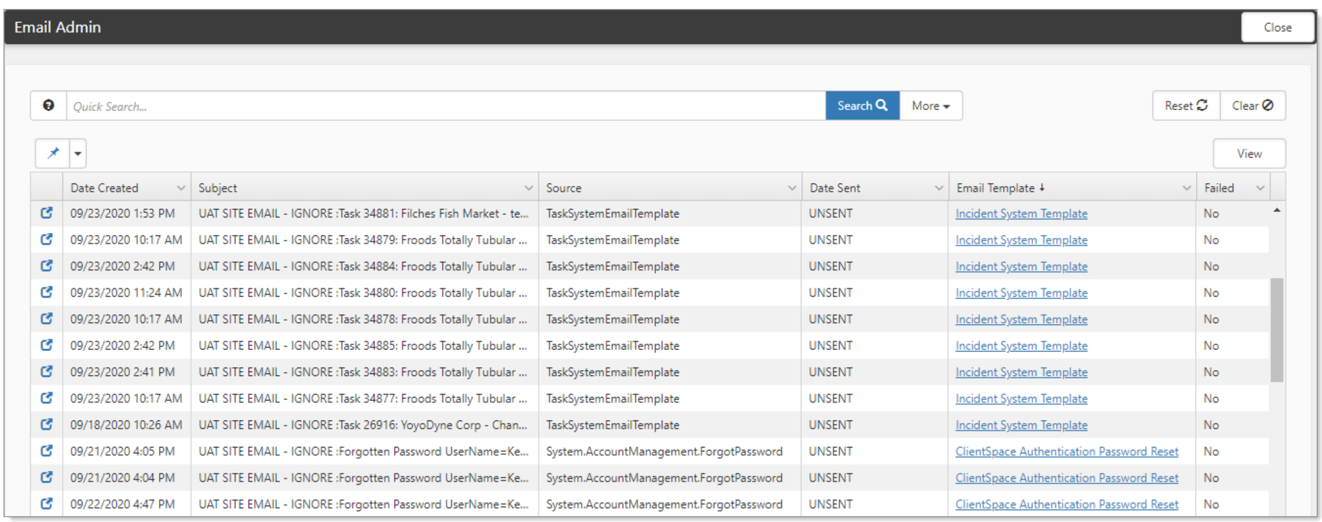
1. To delete a report, select the report and click **Delete**. You must be a Developer User to delete reports.
2. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
3. Locate and select **Process Scheduled AdHoc Reports**.
4. Click **Run Process**.
   The scheduled process runs and synchronizes with Izenda.

Chapter 11
Email Admin

The Email Admin dashboard lists emails generated from calendar events, activities, emails, tasks, email templates, and dataforms. The scheduled process looks at this table, and for any UNSENT items, it sends them. The Date Sent column reflects the status as either a date or UNSENT, which indicates the email cannot or has not yet been sent. For emails generated from the INCIDENT template, the dashboard displays TaskSystemEmailTemplate in the Source column. Otherwise, it displays Task. When there are attachments, you can view them in the Attachments pane.

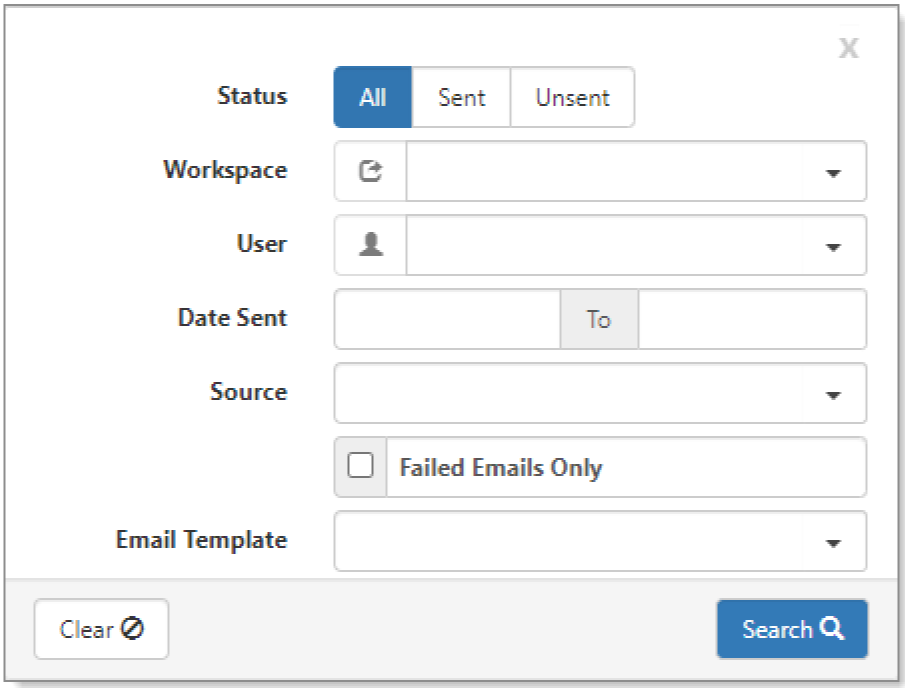
To access Email Admin:

1. Go to **System Admin** > **Email Admin**.
   The Email Admin dashboard opens with a list of entries. You can view entries and search them using Quick Search and More search.

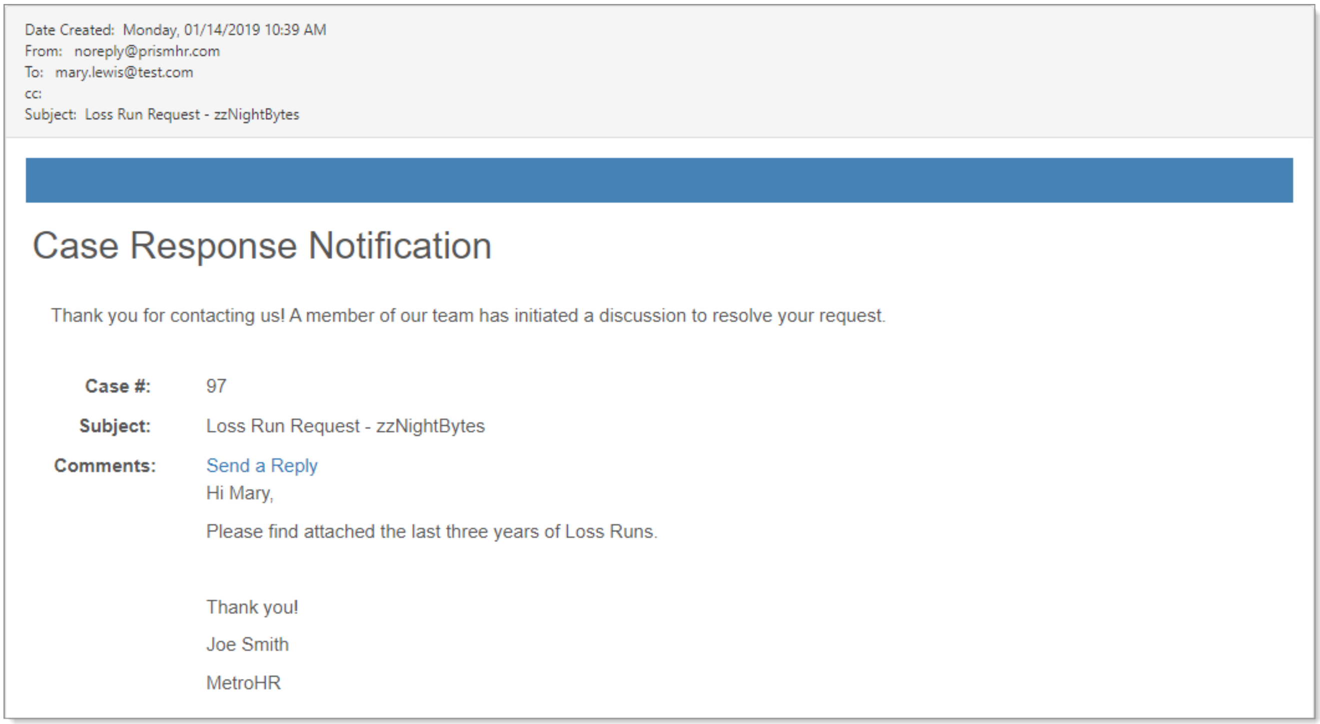


Date Created	Subject	Source	Date Sent	Email Template	Failed
09/23/2020 1:53 PM	UAT SITE EMAIL - IGNORE :Task 34881: Filches Fish Market - te...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 10:17 AM	UAT SITE EMAIL - IGNORE :Task 34879: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 2:42 PM	UAT SITE EMAIL - IGNORE :Task 34884: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 11:24 AM	UAT SITE EMAIL - IGNORE :Task 34880: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 10:17 AM	UAT SITE EMAIL - IGNORE :Task 34878: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 2:42 PM	UAT SITE EMAIL - IGNORE :Task 34885: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 2:41 PM	UAT SITE EMAIL - IGNORE :Task 34883: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/23/2020 10:17 AM	UAT SITE EMAIL - IGNORE :Task 34877: Froods Totally Tubular ...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/18/2020 10:26 AM	UAT SITE EMAIL - IGNORE :Task 26916: YoyoDyne Corp - Chan...	TaskSystemEmailTemplate	UNSENT	Incident System Template	No
09/21/2020 4:05 PM	UAT SITE EMAIL - IGNORE :Forgotten Password UserName=Ke...	System.AccountManagement.ForgotPassword	UNSENT	ClientSpace Authentication Password Reset	No
09/21/2020 4:04 PM	UAT SITE EMAIL - IGNORE :Forgotten Password UserName=Ke...	System.AccountManagement.ForgotPassword	UNSENT	ClientSpace Authentication Password Reset	No
09/22/2020 4:47 PM	UAT SITE EMAIL - IGNORE :Forgotten Password UserName=Ke...	System.AccountManagement.ForgotPassword	UNSENT	ClientSpace Authentication Password Reset	No

2. To search using More search, click **More**.
   The More search dialog box opens. You can search by Status, Workspace, User, Date Sent range, Source, Failed Emails Only, and Email Template.



3. After you have entered the search criteria, click **Search**.
   The results are displayed on the dashboard.
4. To change the column view, on a column, click (**Column Settings**).
   A list of columns displays where you can add or remove to customize the view. By default, the columns Email Template and Failed are hidden. From the Email Template column, you can link to the email template.
5. To view a dashboard entry, select and click (**Open**).
   The item opens.



Date Created: Monday, 01/14/2019 10:39 AM
From: noreply@prismhr.com
To: mary.lewis@test.com
cc:
Subject: Loss Run Request - zzNightBytes

Case Response Notification

Thank you for contacting us! A member of our team has initiated a discussion to resolve your request.

Case #: 97

Subject: Loss Run Request - zzNightBytes

Comments: Send a Reply
Hi Mary,

Please find attached the last three years of Loss Runs.

Thank you!

Joe Smith

MetroHR

6. If there are any attachments for the opened item, you can view them from **Attachments** in the right pane.
7. For entries that are still active tasks, to view the task, click (**Open**).

Date Created: Monday, 01/28/2019 9:30 AM
From: noreply@prismhr.com
To: noreply@prismhr.com
cc: noreply@prismhr.com;
Subject: Task 30823: zzNight Bytes (111111Test) - Pay Rate Change - Paige Dudley (Developer)

Chapter 12
Email Integration

With Email Integration you can streamline communication in ClientSpace from a designated mailbox outside ClientSpace. Email integration is a ClientSpace component that provides automated dataform creation (Client Service Case) from email requests. The integration accesses an email account from a third-party email provider and creates dataforms based on the email account or a specific email alias. After the request processes, an email notification is generated from a configurable template and transmitted as a response back to the sender of the originating email.

Before you configure Email Integration, you need to gather some necessary components for configuration:

- **Email address of the mailbox** to be integrated. The email address cannot be an alias; it must be the actual mailbox email address.
- **Password** to access the mailbox.
- **Host URL** of the email address (for example, outlook.office.com, or payroll.gmail.com).
- The **IMAP connections port** to the mailbox. The default port is 993, but this can be changed at the firewall.

Email Integration supports the following email providers that support the IMAP protocol:

- Aol.com
- Aim.com
- Gmail.com: Currently does not support SaslOAuth
- iCloud.com
- Outlook.com: Before you configure for Outlook, see Configuring distribution groups for Email Integration with Office 365.
- Hotmail.com
- Yahoo.com

The following topics guide you through the Email Integration configuration steps.

Overview of configuring Email Integration

The following steps provide an overview of configuring Email Integration. Links to the individual steps are included. Additionally, follow the link in *What's next* at the end of this topic.

Overview of the configuration for Email Integration:

1. Create your email account.
   - If using Gmail, enable the **Access for less secure apps** option. See Setting the "Allow less secure apps" setting on Gmail.
   - If using Exchange, the mailbox must be IMAP enabled.
2. Before you configure email integration, create the Email Integration Reply Template for the response email message from **System Admin** > **Email Templates**.
   See Configuring the Email Integration Reply Template.
3. Create an Email Integration credential from **System Admin** > **Email Integration** > **Add**.
   See Creating, modifying, or deleting Email Integration credentials.
4. Add an Email Integration Alias for the email account and any associated mailbox aliases from **System Admin** > **Email Integration**.
   See Creating Email Integration aliases.
5. Complete the Step 3: Field Mapping for the dataform to be created by this Email Integration from **System Admin** > **Email Integration**.
6. Enable and schedule the Email Integration process from **System Admin** > **Advanced** > **Scheduled Processes**.

What's next

Proceed to the next topic (Configuring the Email Integration Reply Template) to begin the process.

Configuring the Email Integration Reply Template

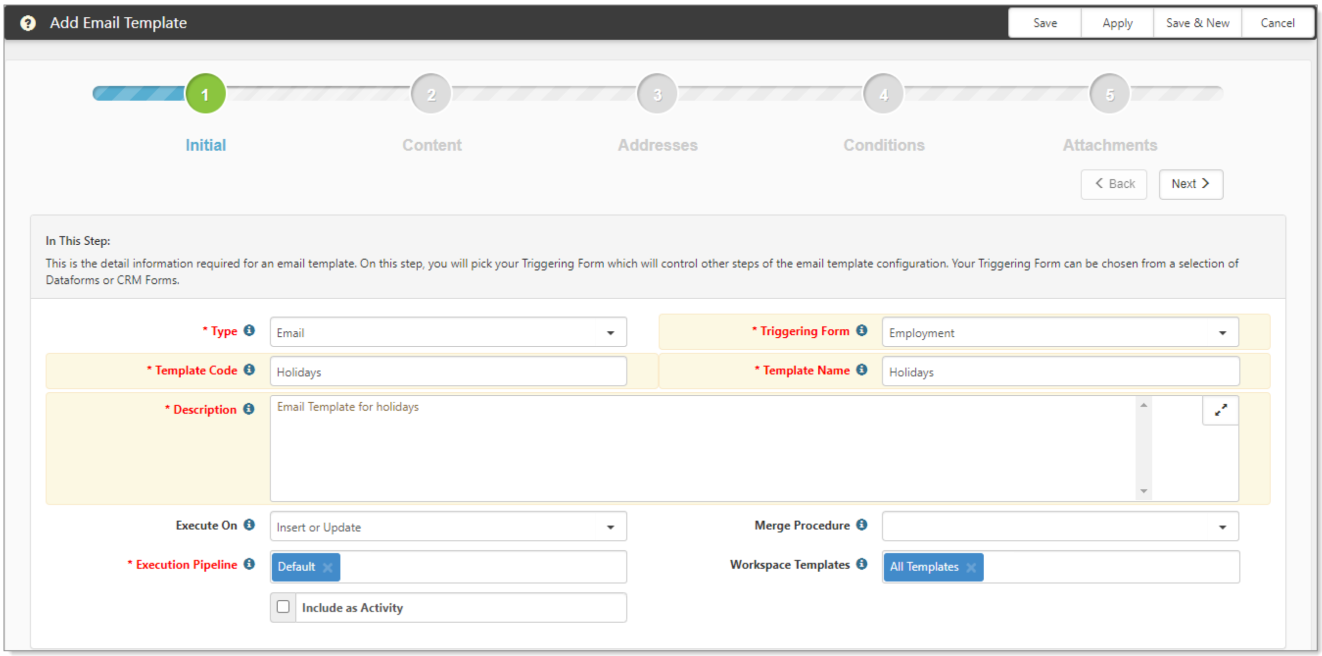
When configuring an email template for the Email Integration response, use the Email Template wizard. You do not need to complete all the steps required for triggered email templates.

To configure the Email Integration Reply Template:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.

2. Click **Add** to add a new template.
   You are presented with a series of steps to start generating your new template.

Step 1: Initial



1. Complete the form fields.

Type	For **Email** notifications: • Select **Email**. For **Task Notifications**: • Select System. For **DocuSign**: • Select DocuSign. For **Case Discussion Replies**: • Select System. Type options include: ▪ **Email**: Default value. ▪ **DocuSign**: For DocuSign Email Templates only. When select

	DocuSign, it enables the API Configuration field for the login and connection record. ▪ **System**: For system-level templates. Use **System** to configure Case Discussion Replies. This type is designed for dataform and system notifications. When System is selected, additional fields are enabled, and the workflow steps are not displayed. ◦ **Subject** line of the email generated by this template. Available when the type is System. ◦ **Body** is used to generate the body of the email. Use the rich text controls for formatting items such as font and background color. Field replacement can also be used to insert application data. Available when the type is System.
Triggering Form	Your selection in the Triggering Form field is the dataform or table where the trigger resides (a field change, a value change). The change to the dataform or table is what triggers the email. Triggering Form is used synonymously with a database table or a dataform[1]. **To add a dataform that is not in the list:** 1. In the **Triggering Form** field, go to the end of the list and select **Add Untriggered Form**. The Select an Untriggered Form dialog box opens. Table Name contains a list of all dataforms currently not marked as Triggerable. 2. In **Table Name**, select a dataform from the list. 3. Click **Ok**. The selected dataform is marked as triggerable and now appears in the Triggering Form list.
Template Code	Must be unique and should be related to the purpose of the email template.
Template Name	Provide a short, descriptive name for your template. Displays in the email template list.

[1]Dataforms dynamically create and manage configurable data collection points. When you add a data-form, a new table is added to the database. Dataforms enable workflow systemization.

Description	Provide a useful description of the email template.
Execute On	Will this email be sent the first time the form is saved (**Insert**), only when the form is changed (**Update**), or every time (**Insert or Update**)? When there are changes to the dataform that you selected in Triggering Form, the Execute On value controls triggering for Insert, Update, or both Insert and Update.
Merge Procedure	Select an optional Merge Procedure here to provide additional system information for field replacement. The procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_merge_proc**. Merge Procedure[1] also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines[1] using a multi-select. This allows you to create a single email template that can apply to multiple execution pipelines. Select the pipelines on which the email triggering is to occur.
Workspace Templates	Select the Workspace Templates[1] to receive this email.
Include as Activity	Select this option to attach the email as an Activity. When the email is triggered, the email message attaches to the triggering record. This action preserves the communication of the sent email. Default: The option is cleared, do not include as an Activity.

2. Click **Next**.

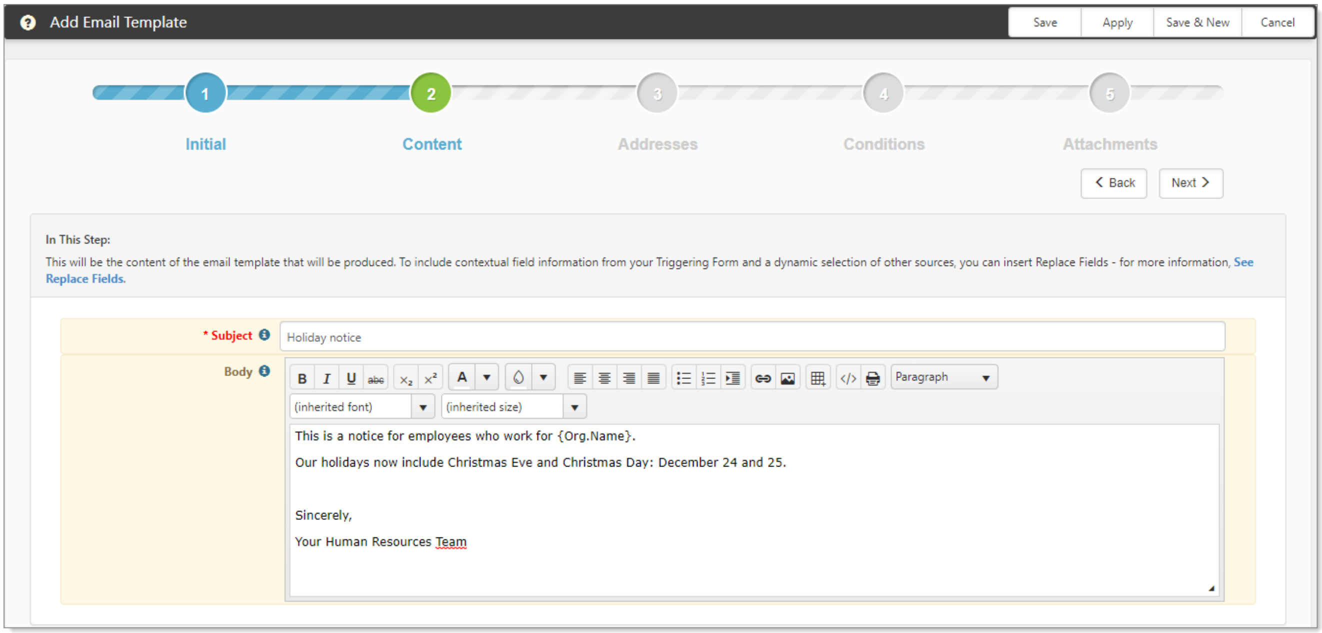
[1]A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

[1]A pipleline determines which rules are applied when the data is saved.

[1]Workspace Templates are special workspaces used for cloning during the Workspace creation process. In this way, ClientSpace allows you to set up multiple workspace configurations (such as an industry-specific Workspaces with a specific, limited list of TOC items) then choose how you want the workspace to look and feel by selecting the appropriate template during workspace creation.

Step 2: Content

In the Content step, you provide a Subject and Body – the email message. You can insert information using replacement fields from the **See Replace Fields** link.



To configure the content of the email:

1. Provide a **Subject** line of the email to be generated.
2. Provide the email message in the **Body**.
   This field uses a rich text editor and supports font styling, embedded images, hyperlinks, and so on. Note: Nothing from this field is used in DocuSign email functionality. DocuSign email templates cannot contain replaceable fields.
3. Click **See Replace Fields** to select items to copy to the clipboard. You can paste items in Subject and Body as applicable.
   See Replacement Fields.
4. Click **Next** to proceed.

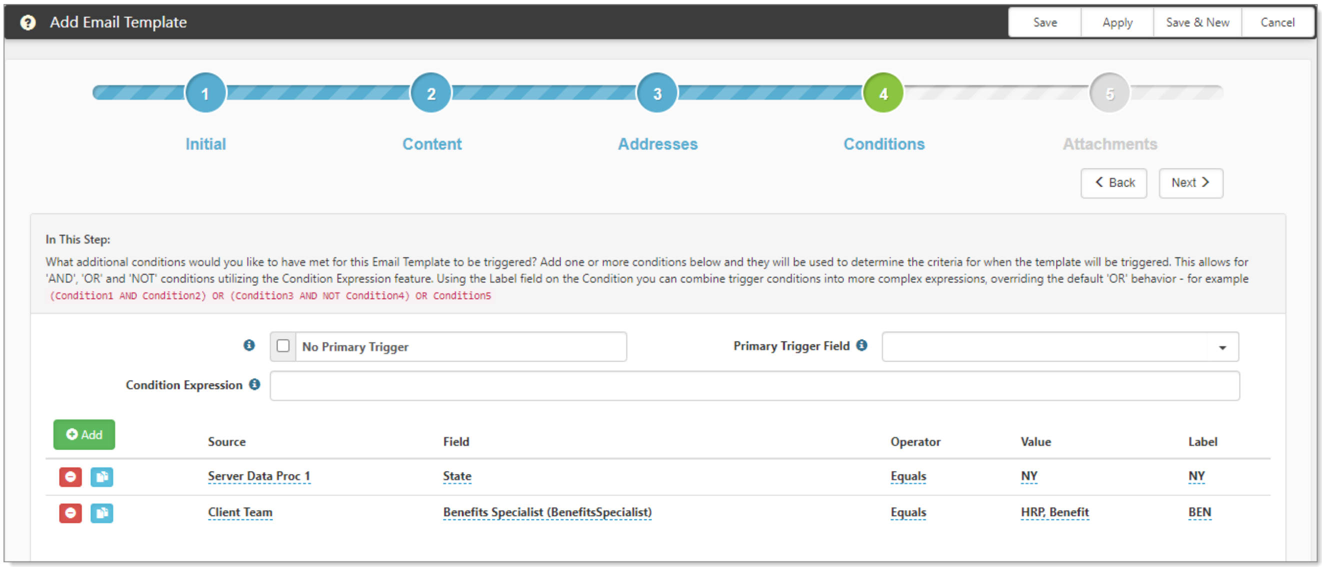
Step 3: Addresses

Skip this step.

- Click **Next**.

Step 4: Conditions

Conditions are display conditions and can also include Condition Expressions. Condition Expressions use the labels that you define for your Display Conditions. For a detailed explanation about conditions, see Condition Expressions.



To configure conditions:

1. Complete the fields:

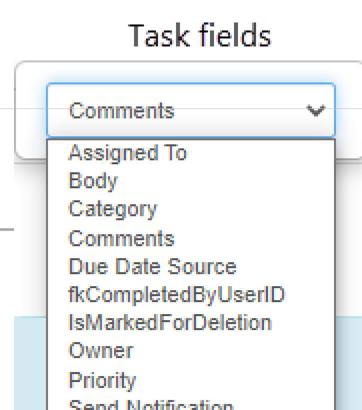
No Primary Trigger	When selected, no single condition must be met to trigger the email template. When selected, the **Primary Trigger Field** is disabled.
Primary Trigger Field	Optional. From the Triggering Form selected in Step 1, which, when changed, triggers the event. This can also be a HdrAction, such as a configured action link on the form. The following statements refer to the condition entries in the **Add** area. Condition entries are identified with a **Label** (the last column). • If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions. • If a Primary Trigger Field is not selected, only the conditions are evaluated.

	• If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND. • If no Condition Expression is used, the additional conditions are treated as OR conditions. The Primary Trigger Field only displays fields associated with the triggering dataform and includes the ability to Add Untriggered Field. **At this point, you can add a trigger field:** 1. In **Primary Trigger Field**, go to the end of the list and select **Add Untriggered Field**. The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as Triggerable. 2. In **Field**, select an entry. 3. Click **Ok**. The selected field is marked as triggerable and appears in the Primary Trigger Field list.

To add display conditions:

2. Click **Add**.
   A row opens with columns Source, Field, Operator, Value, and Label. The Add section is where you can add more granular triggering conditions. Each row you add is a display condition. When Condition Expression is empty, the display conditions process as ORs, meaning only one of the conditions must be met for the email notification to trigger.

Source	Source is the dataform or stored procedure that provides the triggering condition. Source includes all active, single forms and dataforms included in a tabbed set. Source aligns with Implementation Groups. For example, if you do not use risk functionality, then risk related dataforms are not presented in the list. When you select **Task** as the Triggering Form in Step 1 Initial, in this step Source sets to Task. HdrAction is only available when Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.
Field	Select the dataform or Stored Procedure field to compare to the trigger value.



	A few notes: • Email Template triggering provides multi-lookup fields (Multi Lookup (MultiLookup)) as triggering conditions. • Field supports parent form fields (only available operators are empty, not empty, and dirty). • You can Add Untriggered Fields dynamically as well as current, active, triggerable fields from the Source. • When you select **Task** as the Triggering Form in Step 1 Initial, the options for Field include all task fields. For example, when you select Send Notification, and this option is enabled in the Task, then the email notification is triggered. **To add a trigger field:** 1. In **Field**, go to the end of the list and select **Add Untriggered Field**. The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as Triggerable. 2. In **Field**, select an entry. 3. Click **Ok**. The selected field is marked as triggerable and now appears in the Field list.
Operator	Choose the type of comparison. Each value from a Multi Lookup Trigger Field can be added as a separate "=" condition. This supports complex AND, OR, and NOT conditions as well. Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
Value	The criteria against which the trigger field is compared. For a condition that is using a user datatype as the Field, the Value field uses a typeahead[1] method so that you do not need to look up the User ID for the text field.
Label	The label to use when constructing Condition Expressions for triggering. Make this label short and representative of the Trigger Field. Labels are used in the Condition Expression field.
Condition Expression	Allows for **AND**, **OR**, and **NOT** conditions using the trigger conditions (Label)

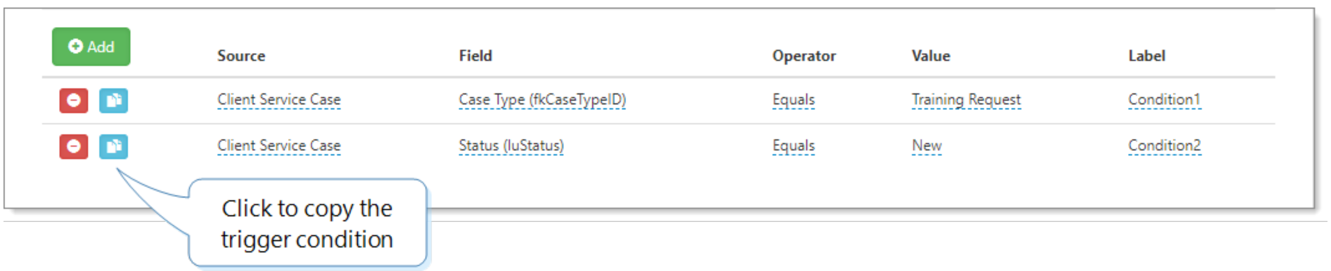
[1]As you type in the field, one or more matches for the term are found and immediately presented.

from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Condition Expressions adhere to AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions.

> When the Condition Expression field is empty, the row entries are treated as OR conditions. Only one of the conditions must be met.

To clone a trigger condition:

To save some time, you can clone a trigger condition and then edit as appropriate.



1. In the **Add** section, locate an entry that you want to copy.
2. Click  **Clone**.
   A new row opens, with the trigger condition copied. Source, Field, and Operator are copied.
3. You can now edit the new condition as appropriate.
4. Click **Apply** or **Save**.
5. Click **Next** to proceed through the remaining steps until you **Finish** the template.

What's next

Proceed to the next topic (Creating, modifying, or deleting Email Integration credentials) to begin the process.

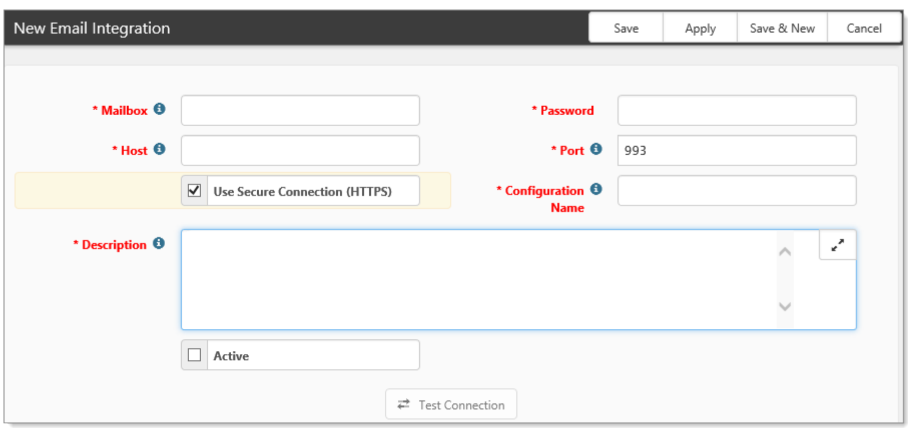
Creating, modifying, or deleting Email Integration credentials

The Email Integration login credentials are stored in the API Credentials table (tblAPICredentials) and are maintained from System Admin > Email Integration. For existing credentials, the Password field is hidden. To change the password for an existing credential, see Edit a credential.

Add a credential

To add a credential:

1. Go to **System Admin** > **Email Integration**.
   The Email Integration dashboard opens. From here, you can add, edit details, and delete records.
2. Click **Add**.
   The New Email Integration form opens.



3. Complete the following fields:

Mailbox	Required. The email address for the email account with which you would like to integrate. Email addresses are case insensitive and must be in a valid format. This address must be attached to a supported email provider (such as Gmail, AOL). The address must be an actual email address associated with this mailbox and not an alias for the mailbox.

	Later in the configuration process, an email alias is created using this email address. The alias provides to ClientSpace the default values for the workspace, project type, and client.
Password	Required. The user account password. Depending on the email provider, this field may be case sensitive, so ensure that you use the appropriate case when you enter the value. When editing an existing credential, the Password field is hidden. To change the password, see Edit a credential.
Host	Required. The IMAP mail host for the mail client. This setting is used when connecting to the mailbox. For information on your IMAP host settings, contact your mail provider.
Port	Required. The secured firewall port used by your provider to allow access to the mailbox. Most IMAP providers use Port 993, so we default the field to this.
Use Secure Connection (HTTPS)	Connect to the mail provider over the internet via unsecured (HTTP) or secured (HTTPS) access. Defaults to selected (secured).
Configuration Name	Required. Should contain the application name associated with the application code. This name will appear in Lists, so it should provide a hint at the mailbox association.
Description	Required. Should contain a brief description of this credential.
Test Connection	Test Connection is disabled until all required fields are completed, at which point the button color indicates it is ready for use. Select **Test Connection** to ensure the connection information connects to the mailbox successfully before proceeding to the next step. A successful test presents the message: We were able to connect to your mailbox. Unsuccessful tests yield an error message. Some examples of common errors and their causes: • `xm001 NO [AUTHENTICATIONFAILED] Invalid credentials (Failure)` - Bad username or password • `No such host is known` - Bad hostname

	• `Object reference not set to an instance of an object`. This message is more generic but is most commonly caused when a secure connection is required, and the **Use Secure Connection** option is cleared. Before deleting a credential, you must ensure that it is not associated with any email aliases, else an error will be logged.

4. Click **Save**.

Edit a credential

To edit the password for an existing credential:

1. Go to **System Admin** > **Email Integration**.
   The Email Integration dashboard opens. From here, you can add, edit details, and delete records.
2. Select the credential and click (**Open**) or **Details**.
   The Email Integration form opens.
3. In the **Action Center**, click (**Change Password**).
   The Change Password dialog box opens.
4. Complete the fields:

New Password	Enter the new password.
Confirm Password	Enter the new password again.

5. Click **Ok**.
6. On the Email Integration form, click **Test Connection** to test the password.
7. If the new password matches the password for the mailbox, a green-shaded Connected Successfully message dialog box opens. To close, click **Ok**.
8. If the password does not match, an Invalid Password security error appears.

What's next

Proceed to the next topic Creating Email Integration aliases to continue the process.

Creating Email Integration aliases

Email Integration aliases link a credential to an email address and identify and group several default values for processing the email requests. The Email Integration Aliases are stored in the Email Integration table (tblEmailIntegration). An example of how an alias links to an email address, is when you want to enable functionality for replying above the line with case discussion messages. See Configuring Case Discussion: Reply Above This Line.

For an email address to be processed, it **must** have an Alias specified in the alias table. If no alias is found, an email integration error is logged as “Email Contains Missing or Invalid Key Information - Workspace ID: # Project Type ID: 0”. When this occurs, the reply message is **not** generated and transmitted. When adding email aliases to your mailbox, coordinate this activity with your email administrator.

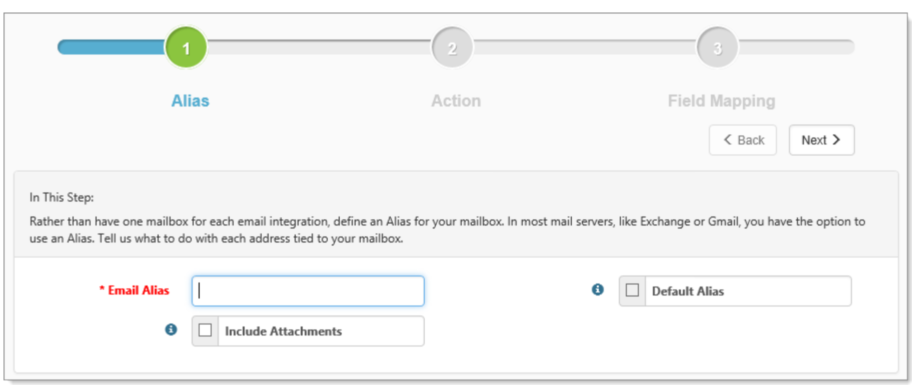
> Review the topic Email Integration processing for a comprehensive picture of the process.

Step 1: Alias step

An Email Integration record can have multiple aliases on a mailbox. The email address is how it connects to the mailbox. The alias defines what it does with the mailbox. In this step, specify the email address to match an email mailbox, such as `payroll.bigtmepeo@gmail.com`.

To create email integration aliases:

1. Go to **System Admin** > **Email Integration**.
   The Email Integration dashboard opens.
2. Select an entry from the list and click **Details**.
   The Email Integration form opens
3. In **Aliases**, click (**New**).
   The Alias step opens.



4. To create, delete, or modify an email template, access the Email Integration Alias page and set the following fields:

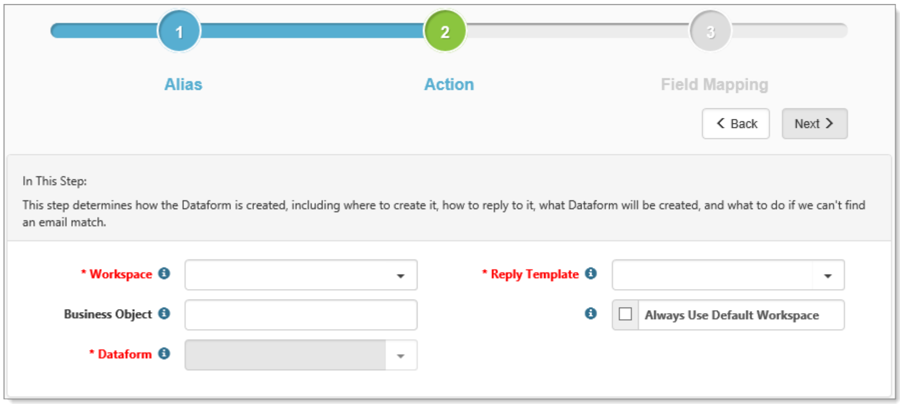
Email Alias	Required. Should contain the email address associated with this alias. The email To address is used to match an email to its associated alias. Each credential should have at least one email alias associated with the account email address. Additional, email aliases can be created so that email accounts with multiple email aliases can be mapped to different Project Types. You can create as many email aliases as the provider allows. There may be differences in the “To address” format of email aliases between providers. For example: • Credential Username: client@gmail.com • Email Account: client@gmail.com • Email Alias 1: client+clientservicecase@gmail.com • Email Alias 2: client+createemployee@gmail.com In this example, you would create 3 email aliases, the first using the Email Account as the email Alias value. This creates the default email alias to be used. The second would be created using email Alias 1 and the project type set to the Project Type associated with creating a Create Client Service Case project type. The third would be created using email Alias 2, and the project would be set to the Project Type associated with creating an employee (the only supported dataform created using this method is the Client Service Case dataform).
Default Alias	If an alias cannot be located by the email address for the incoming email, this alias is used to process the email for the API configuration mailbox. Only one default alias can be defined.
Include Attachments	Optional. When set, email attachments are downloaded and attached to the dataform during processing. File attachments are checked against the list of Valid Email attachment types stored in the Lookup ValidAttachExt. Unrecognized email attachments are added to a .zip archive and attached with the message: "CAUTION! The original file is NOT AN ALLOWED FILE TYPE in ClientSpace, and it has been converted to a Zip Archive"

5. Click **Next**.

The Step 2: Action step opens.

Step 2: Action step

The Action step determines how the dataform is created, including where to create it, how to reply to it, what dataform will be created, and what to do if we cannot find an email match.



1. Complete the form fields:

Workspace	Required. Contains the workspace that will be used by this email alias for the dataform creation if no matches for the sender's address are found. This is the default workspace used during the processing of the email. This value may be overridden by including the workspace in the body of the email. The override value must contain a valid workspace ID and be formatted as WSID=# with no spaces between the WSID= and the workspace ID. • Select a workspace from the list.
Reply Template	Required. Must contain the reply template to be used to send the process complete notification. Select a Reply Template from the list. This can be an existing triggered template, or you can create one just for this reply. See Configuring the Email Integration Reply Template. • For case discussions, select **Case to Email Reply**.
Business Object	This is the ClientSpace business object that stores any code to be run during the email integration process. This should either be left blank or filled in with the appropriate business object. **Important**: If you are configuring this for Case Discussion Replies, the requirements are quite different. See Step 2: Configure the Email

	Integration Mailbox. The business object looks up the workspace using a CLID (ClientNumber) or WSID (ProjectID) to modify the data before the dataform is created or to modify the data before the reply template is generated and sent. In this way, you can add layer-specific data values to the form or layer-specific replace code values to the reply email. • The business object for a standard email integration is **ClientSpace.PEO.Business.EmailIntegrationBase**. **Pipeline Business Logic** • **CLID** represents ClientID or Client Number from the Client Master page in the PEO system. • **WSID** represents WorkspaceID or ProjectID. This is a unique key used as a Foreign Key on all dataforms related to a workspace or project. These options are powerful because the Workspace selection is not dependent on the email being sent from a specific email address. This allows your clients to send from personal email at home or on a mobile device, but they must always include the CLID or WSID in the exact format: `CLID=123456` or `WSID=654321` These strings cannot contain additional spaces and must use the appropriate Client Number or ProjectID. If you have questions about this, please log an Extranet case. **Note**: Clients should insert the CLID or WSID in the body of the email message. If **Always Use Default Workspace** is not selected and the business object is configured, the system checks the body of the email for the CSID / WSID information. If no match is found, the system uses the Email Integration processing hierarchy to determine which workspace is used when creating the new dataform. **Configuring the business pipeline** The default PEO business object resides in the DLL Custom Path folder and its complete name is **ClientSpace.PEO.Business.EmailIntegrationBase**. This name is case sensitive and must match precisely in the configuration. If no business object is specified and the message contains a CLID tag, an exception occurs.

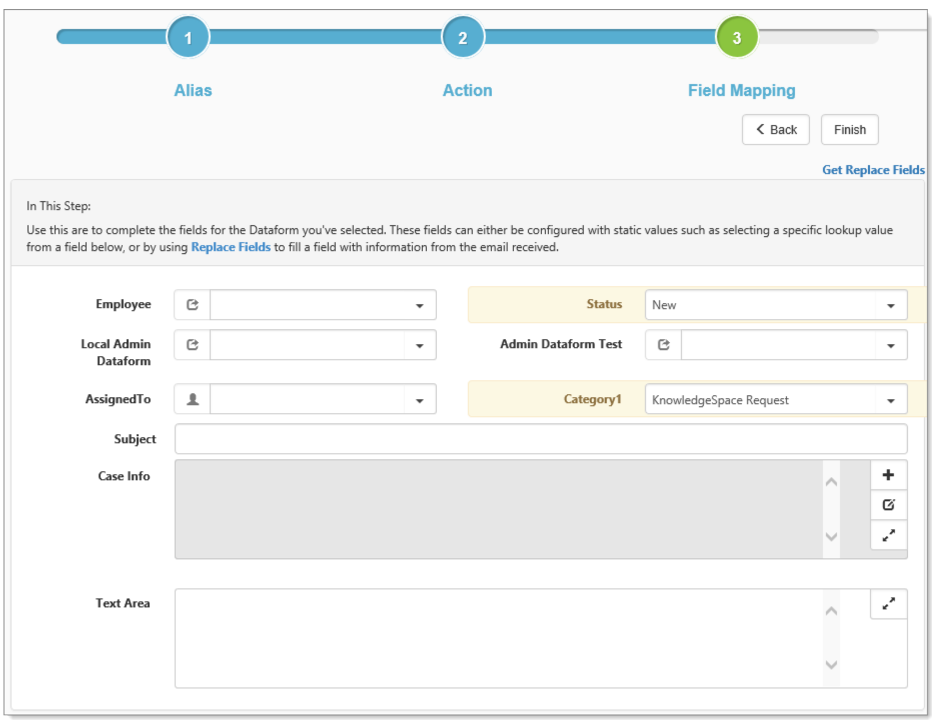
Always Use Default Workspace	When selected, this option forces the system to use the default workspace set in the **Workspace** field, regardless of the other methods of workspace selection.
Dataform	Required. Contains the project type associated with this email alias. This determines what type of dataform to create. Select the Project Type from the list. • For case discussions, select **Case Discussion Message**.

2. Click **Next**.

The Field Mapping step opens. Go to the next topic, Step 3: Field Mapping.

Step 3: Field Mapping

Use field mapping to complete the fields for the Dataform you selected. Fields are exposed to Email Integration by selecting the Cloneable option on field properties under Dataform management. These fields can either be configured with static values, such as selecting a specific lookup value from a field or by using replacement fields to fill a field with information from the received email.



To use replacement fields:

1. Click **Get Replace Fields**.
   The Replace Fields dialog box opens with a list of fields from the email.
2. Select as many fields as required and then click **Copy**.
   The Clipboard dialog box opens with the selected fields.
3. Click **Ok**.
4. Paste the copied fields into the appropriate field, such as Subject or Text Area.

When the task or dataform is produced through the cloning process, these fields are replaced with the appropriate field data. The Communication Method field, unless filled in, defaults to **Email Integration**.

Email Integration Email Field Replace codes

The following field replacement codes are available for use in email template data map fields as well as, the email alias data map fields.

{EmailBody}	The entire email body.
{EmailSubject}	The email subject.
{EmailToAddress}	The email To address. In the event there are multiple email addresses, this is the first email address.
{EmailFromAddress}	The email sent From address.
{EmailHasAttachments}	True or False depending on if the email had attachments. This does not indicate that the attachment was downloaded and attached. It only indicates the email had an attachment.
{EmailAttachmentCount}	The number of attachments on the email.
{EmailAttachmentsRefused}	
{EmailAttachmentsRefusedReason}	
{EmailAttachmentsUploaded}	
{EmailCCAddressAll}	The copied recipient email addresses.
{EmailEmailForwardedFromAddress}	The forwarded From email address.
{EmailToAddressAll}	The email recipient addresses.

{EmailMessageID}	The email message ID.
{WSSource}	Information about which of the source selection methods was used to determine the workspace in which to create the case.

What's next

Review the topic Email Integration processing for a comprehensive picture of the process. And then create the Email Integration Reply Template (Configuring the Email Integration Reply Template.

Setting up an email alias on Gmail

One way to maximize the mileage of the ClientSpace Email Integration is through aliases to create specific case types or create cases in a specific workspace. For this to work, however, you must first have a unique email address to which mail will be sent. For Gmail, this is accomplished using custom tags appended to your Gmail user account.

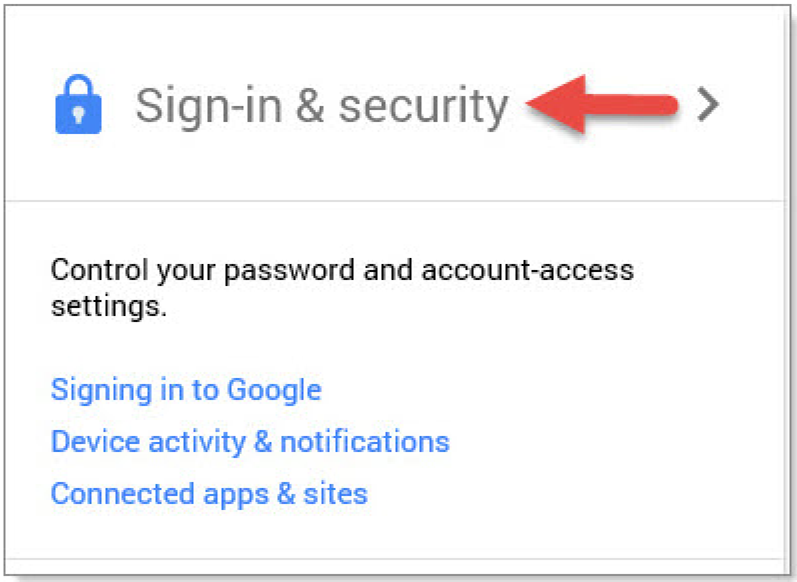
Gmail does not offer traditional aliases, but you can receive messages sent to your.username+any.alias@gmail.com. For example, messages sent to jane.doe+payroll@gmail.com are delivered to jane.doe@gmail.com.

You can also set up filters in Gmail to automatically direct these messages to **Trash**, apply a label or star, skip the inbox, or forward to another email account.

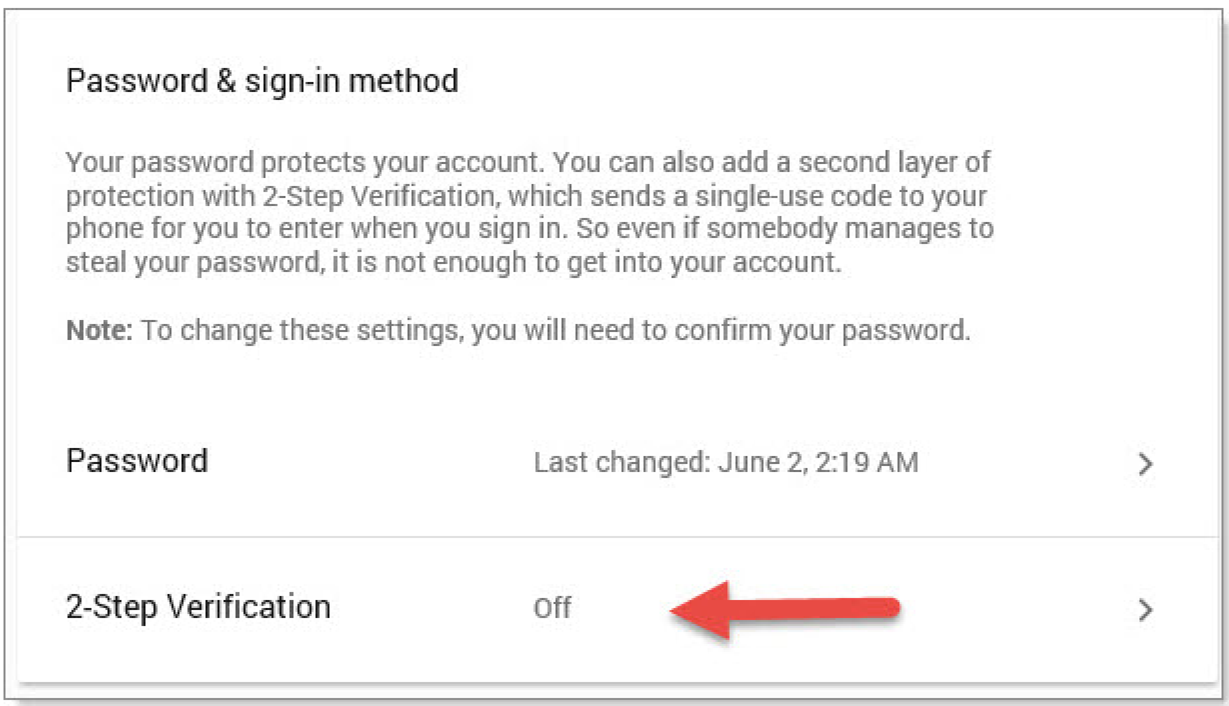
In ClientSpace, you can then use this aliased email address to create custom API Configurations, Email Integrations, and Email Templates that can then be used to either create a specific type of Client Service case, generate the case in a specific workspace or both, as well as send customized responses back to whoever logged the request. In the example, your email template response could begin "Thank you for logging a Payroll Case with BigPEO. Your payroll representative has been alerted and someone will be contacting you shortly to help you resolve your issue."

Setting the "Allow less secure apps" setting on Gmail

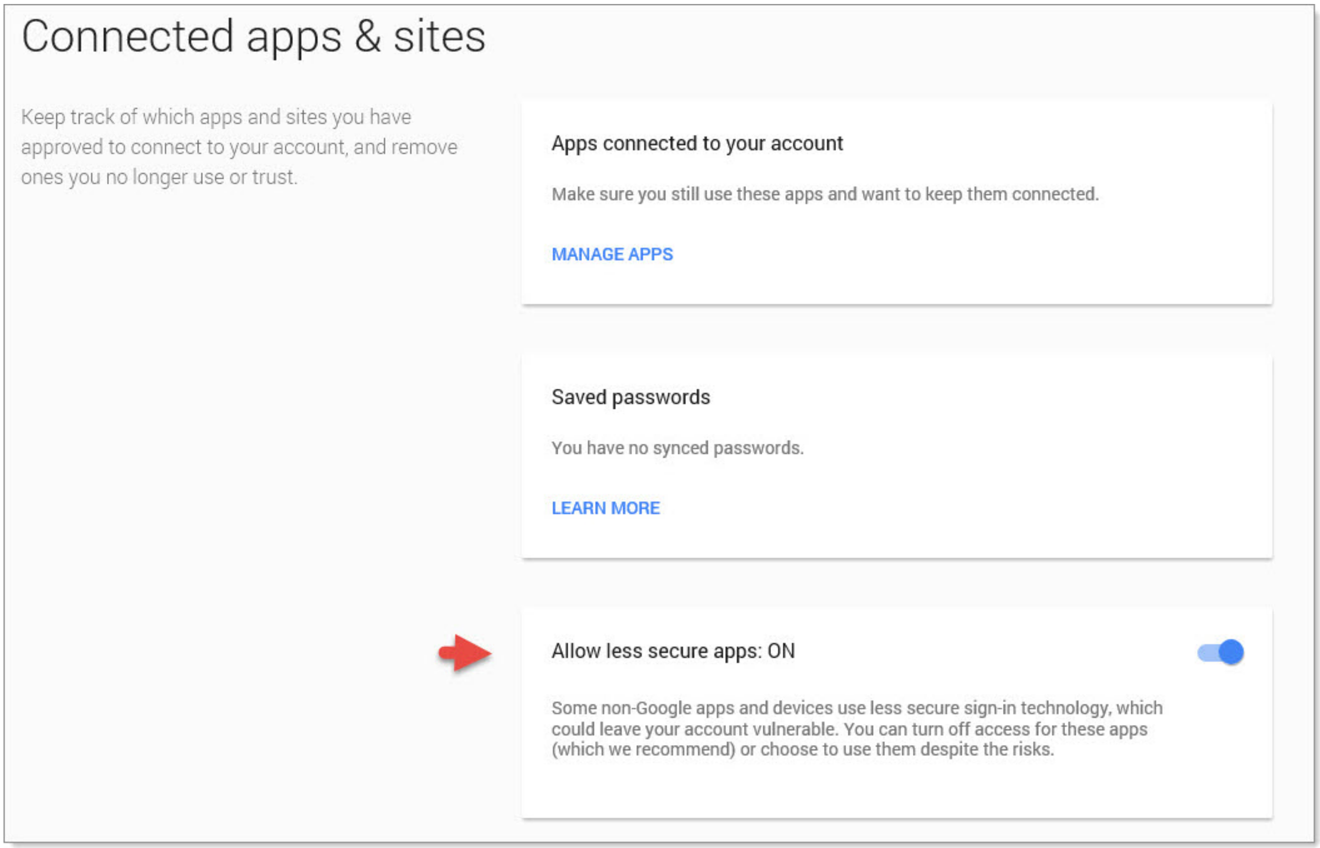
1. Open the Gmail account and go to **My Account**.



2. Click **Sign-in & Security**.
3. If enabled, set **2-Step Verification** to **Off**.



4. Turn on the **Allow less secure apps** option.



Email Integration processing

Email integration processes an external email account and creates a Client Service Case (dataform). The Email Integration scheduled process performs multiple actions to process the emails and save them as a case.

Action	Description
Credentials	The credential is looked up from the API Credentials table using the Application Code that matches the mailbox being searched.
Unread emails are downloaded	The list of unread emails is downloaded.

Action	Description
Determine workspace	• If **Always use Default Workspace** is selected, the system uses the Default Workspace ID. • The Email Alias is looked up based on the email To address. If a match is found, it uses this to determine the workspace. • The body is searched for the CLID (Client Number) token, and if found, the business object is called to interpret the CLID and return the appropriate workspace ID++++. • The body is searched for the WSID token, and if found, and the workspace was not set by the business object CLID request, the workspace ID is set to the WSID value. • The email From address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the workspace associated with that employee is used and if multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. The email addresses are used for workspace lookup purposes to determine where to generate the case. • If no workspace is determined, the contacts are searched for one with the same email as the email From address. If found, the primary project ID for the contact is used as the workspace ID. • If the contact is not found, the Organization table is searched for an organization with the same email domain. If found, the default workspace for this organization is used. • If no workspace is found, the default workspace from the alias is used along with the project type to create the appropriate data form.
Body scanned	• When the dataform type and workspace are found, the body is scanned for additional data value tokens that are added to the form data XML document in addition to the email data items to set valid fields. • Any invalid special characters found in the email subject and body are scrubbed. This process does not log an error message.

Action	Description
Business object	• If a business object is specified, the EmailIntegrationCreateNewForm is called to allow the business layer to set data values before creating the form. • If the Business Object does not cancel the save, then the dataform is saved.
Dataform saved	The attachments are downloaded and attached to the form based on the alias Include Attachments indicator.
XML document	In addition to the email fields, the saved data is placed into an XML document to generate the reply message.
Set data values	If a business object is specified, the EmailIntegrationNotifySender is called to allow the business layer to set data values before generating and transmitting the notification.
Notification sent	If the business object does not cancel the notify action, then the notification is sent.
Marked as read	The email is then marked as read.

Configuring distribution groups for Email Integration with Office 365

To create distinct client Email Integration aliases with an Exchange mail server in Office 365, you first need to create custom distribution groups on your exchange mailbox. This topic walks you through the process of creating these unique groups.

To configure distribution groups for email integration:

1. Log into Office 365 Online using an account that has administrative rights on the targeted mailbox.
2. Go to the **Admin Area** of the account.
3. Select **Groups** and choose **Set up distribution lists and other Exchange groups in the Exchange Admin center**.
4. Choose **Add new** > **Distribution group**.
5. Complete the Distribution group setup by adding the following:

DisplayName	Best practice is to make this the email address without the domain (@somewhere.com).
Alias	Best practice is to make this the same as the Display Name.
Email address	Generated automatically by the system but can be altered before you save.
Members	Add the primary mailbox to the Members area.

6. **Save** the Group Record.
7. Edit the record and select **Delivery Management**.
8. Select **Senders inside and outside of my organization**.
9. **Save** the record again.

The alias email address is now ready to use when configuring ClientSpace Email Integration alias records. These instructions require Admin access to the Exchange mailbox. Contact your Exchange administrator for help configuring these group options.

Chapter 13
Email add-in for Outlook

This topic provides step-by-step instructions for installing and configuring the email add-in for Outlook for:

- outlook.live.com
- Office 365 Online
- Outlook in Windows

Why use the email add-in?

The email add-in connects your Outlook email Inbox with ClientSpace to automate the process of creating an activity record when you send an email. The add-in eliminates the need to maintain activity records in multiple places. When you send an email from ClientSpace, the activity is captured for the client, prospective client, or lead. Additionally, the email add-in enables an easy way to create activities, cases, and tasks from received emails listed in the External Mailbox dashboard. All activity is performed from within ClientSpace.

Overview of configuration

1. The first step is to install and configure the email add-in for Outlook.
   - Select your preferred method of accessing Outlook (outlook.live.com, Office 365 Online, or Outlook in Windows).
   - Follow the installation procedures in this topic.
2. The second step is to select an email message and post it to ClientSpace.
   - See the *ClientSpace User Guide* for selecting the email and posting to ClientSpace.

Microsoft Outlook add-in deployment

The following instructions for distributing the Add-In though Exchange Admin should be used when publishing the Outlook add-In. Any deviation from this procedure may produce unexpected results and falls outside the scope of support for this product.

Per Microsoft, Outlook add-in deployment requires:

- Office 365, Exchange Online, or Exchange Server 2013 or later
- Outlook 2013 or later

It is also highly recommended that you apply the latest service pack / patches for Exchange server to ensure you have Microsoft's latest deployment code. More details about this and the technology used for these add-ins can be found here: https://docs.microsoft.com/en-us/outlook/add-ins/

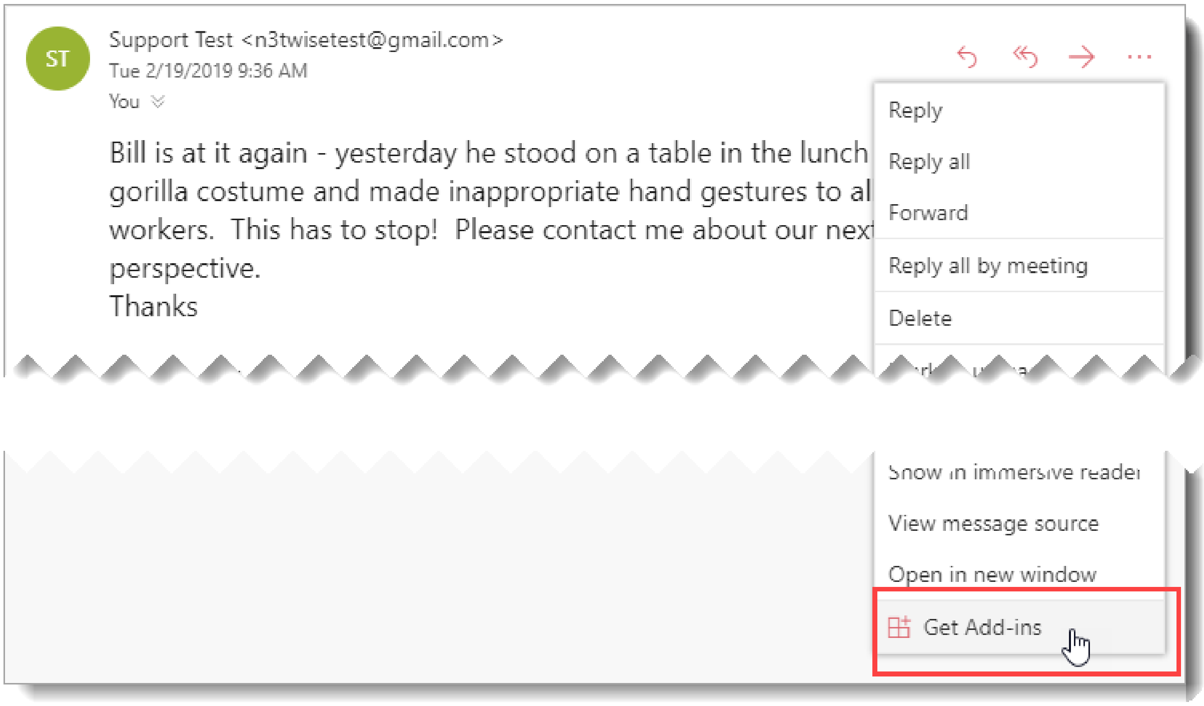
Installing from outlook.live.com

This section describes how to configure the add-in from outlook.live.com.

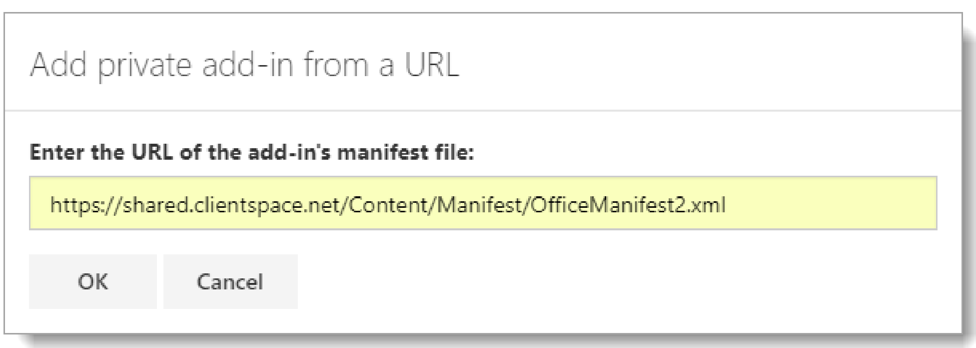
> Keep ClientSpace and Outlook open during the installation procedure. You will need to toggle between your ClientSpace site and Outlook session. The procedure requires that you keep the sessions open while gathering the various pieces of information.

To install the email add-in for Outlook:

1. Sign in to your Outlook account.
2. Open an existing email.
3. At the top of the email message, on the right side, click **. . .** (**More actions**).
   A list of options is displayed.



4. Click **Get Add-ins**.
   The **Add-Ins for Outlook** dialog opens.
5. Click **My add-ins**.
6. Under **Custom add-ins**, click **Add a custom add-in** > **add from URL**.
   The **Add private add-in from a URL** dialog opens.
7. In **Enter the URL of the add-in's manifest file**, paste the following URL:
   `https://shared.clientspace.net/Content/Manifest/OfficeManifest2.xml`



8. Click **OK**.
   A Warning message is displayed: "This custom add-in may access your personal data and send it to a third-party service. It hasn't been verified by Microsoft. Make sure you trust the source of the add-in."

9. Click **Install**.
   The ClientSpace for Outlook add-in is added and displayed in the Custom add-ins area.
10. Click **X** to close the dialog.

The next few steps configure the settings: URL, Username, and Mail Key.

Next: Check your email address in ClientSpace

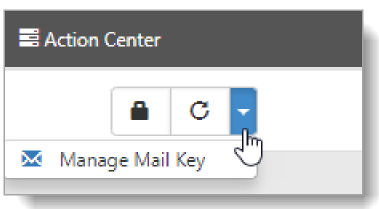
To ensure that your email address is added to your ClientSpace User Details:

1. From ClientSpace, click **<username>** > **My Profile**.
   The User Details form opens.
2. In **Email**, ensure that the appropriate email address is recorded. This email should be the same email address as the one you use for Outlook (for example jsmith@outlook.com).
3. Update the information in ClientSpace if required and click **Save**.

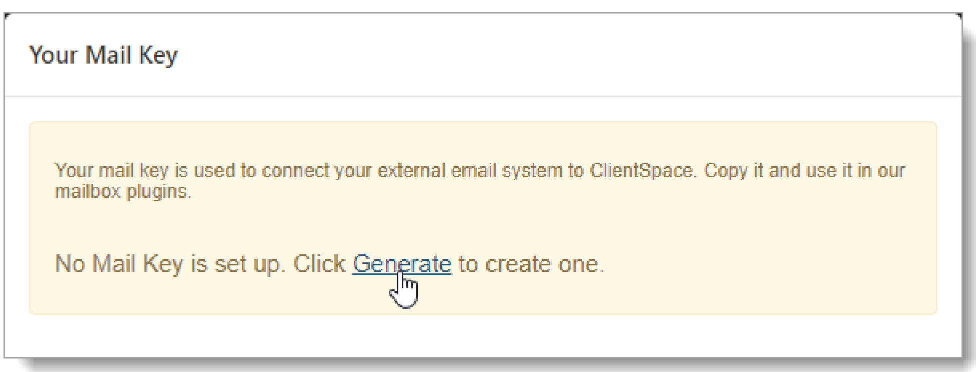
Next: Obtain Mail Key from ClientSpace

To obtain the Mail Key:

1. In ClientSpace, from your **User Details** page, in the **Action Center**, select **More Options** > **Manage Mail Key**.



The **Your Mail Key** form opens.



2. If no Mail Key is set up, click **Generate** to create one.

Your Mail Key is displayed so that you can copy and use it for connecting to your external mail system to ClientSpace.

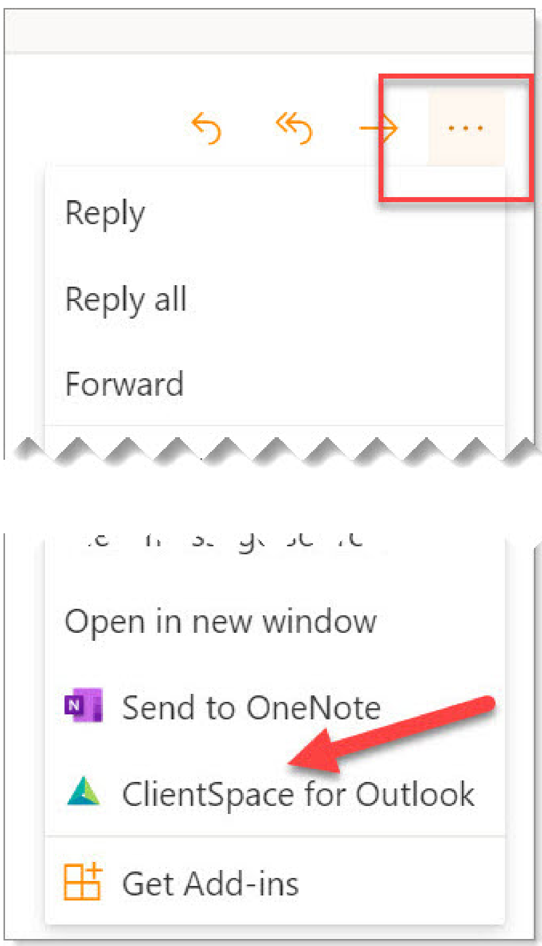
3. Click the key to copy it to your clipboard.
   The Clipboard opens showing the key.
4. Click **Ok**.
5. Click **Close**.

At this point, the key is copied to your clipboard and you are ready to paste the Mail Key in the Outlook configuration pane.

Next: Back to Outlook

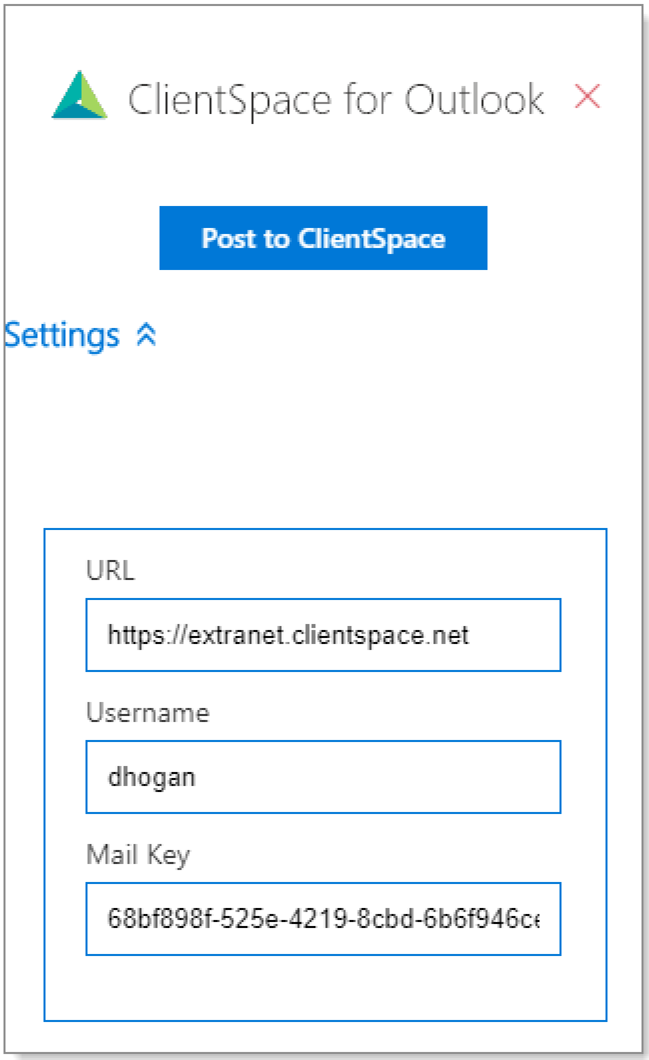
To continue the configuration:

1. In Outlook, from the previously opened email, click **. . . (More actions**).

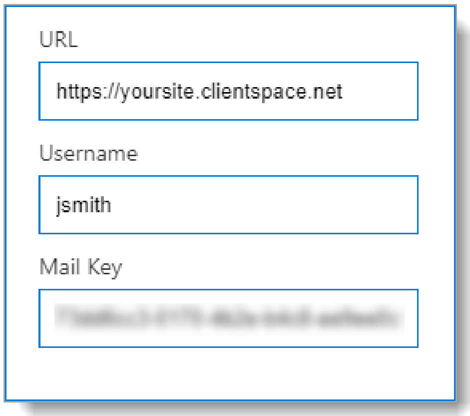


2. From the list of options, click **ClientSpace for Outlook.**

The ClientSpace for Outlook pane opens beside the open email. You must open this pane for every Outlook email that you want to post to ClientSpace.

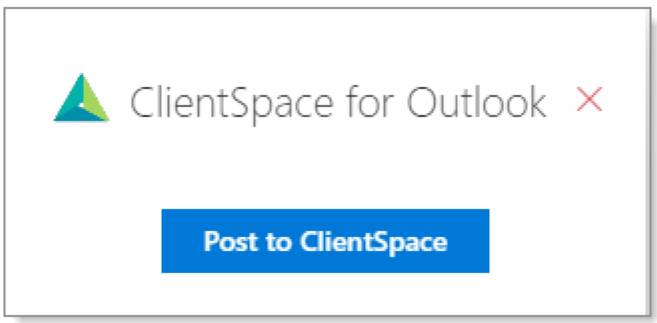


3. In the ClientSpace for Outlook pane, if you do not see fields for URL, Username, and Mail Key, click **Settings**.
   The fields are now displayed.
4. In **Mail Key**, paste the key that you just copied. Let's fill this field first so that you retain what you just copied to the clipboard.
5. Go to your ClientSpace site and copy the ClientSpace URL (for example, `https://yoursite.clientspace.net`). **Note**: DO NOT append `/next` to the end of the URL.
6. In **URL**, paste the URL of your ClientSpace site.
7. In **Username**, type your ClientSpace username (for example, *jsmith*).



Now you are ready to post the opened email message to ClientSpace.

8. Click **Post to ClientSpace**.



This action logs you into ClientSpace displaying the email message from Outlook, which is now visible in ClientSpace.

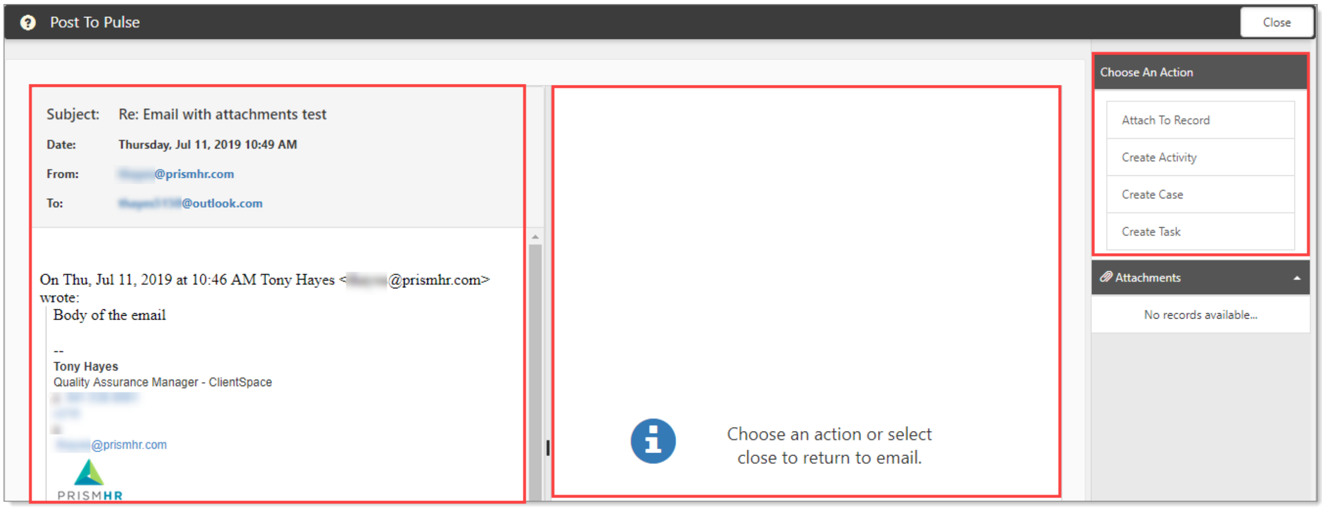
9. If pop-ups are blocked, click the Pop-up blocker and select **Always allow pop-ups and redirects from https://outlook.live.com**.

What's next?

When you click **Post To ClientSpace**, you are then logged into ClientSpace. The Post To ClientSpace page appears.

From the Post To ClientSpace page, you can:

- Attach the email to a dataform (record)
- Create an activity
- Create a case
- Create a task



Additionally, Global Admins can post Help topics for this page and make them available to your users. You are now logged into ClientSpace, ready for the next action.

Installing from Office 365 Online

This topic describes how to configure the add-in from Office 365 Online.

To install from Office 365:

1. Log into your office 365 account online (portal.office.com) and access your Outlook mailbox.

   If your Administrator has installed the add-in as **Optional - Enabled by default**, or **Mandatory, always enabled**, when you select an email in the list you will see the add-in icon in the upper right:

2. If the add-in has been installed as **Optional, disabled by default**, perform the following steps to enable it.
   - Click the settings icon (gear) and select **Manage add-ins**.
   - If the Manage Add-ins option is missing, it is likely that Outlook Web Access has been disabled in your environment. Speak with your Exchange administrator about enabling this functionality.
   - If your administrator has installed the add-in in Exchange and you have rights, you will have the option for Admin-managed add-ins.
   - Click **Admin-managed**.
   - Then click **Add** for the Outlook Add-in.

3. When you return to your Outlook Mail and select an email you will see the add-in icon in the upper right:

Installing from Outlook in Windows

This topic describes how to configure the add-in from Outlook in Windows.

To install from Windows:

1. If your Administrator has installed the add-in as **Optional - Enabled by default**, or **Mandatory, always enabled**, and you have logged into Outlook via portal.office.com, the add-in should be present when you open your windows install of Outlook (Office 2013 and newer).
2. For environments where the admin has made this add-in **Optional, disabled by default**, or if you have not opened Outlook from portal.office.com, you need to manually install the add-in using the following instructions.
3. Open the Outlook application (2013 and newer) on your Windows desktop.
4. In the upper left, click **File**.
5. Scroll down until you see **Manage Add-ins**.
   If the Manage Add-ins tile is missing, it is likely that Outlook Web Access has been disabled in your environment. Speak with your Exchange administrator about enabling this functionality.
6. Click **Manage add-ins**.
   It takes you to a login for Office 365.
7. Log in to Office 365.
8. After you log in, if your administrator has installed the add-in in Exchange and you have rights, you see the option **Manage add-ins**.
9. Click **Manage add-ins**.
10. Select the **ClientSpace for Outlook add-in** option.
11. When you return to Outlook and have an email selected, you see the icon for the add-in in your toolbar .

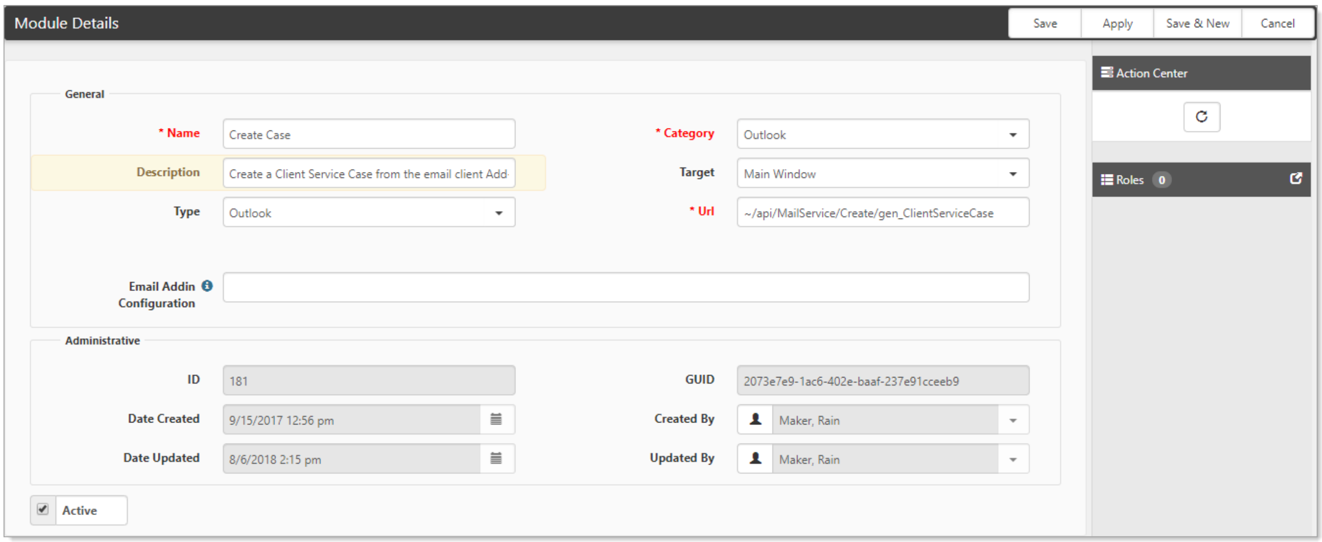
Configuring the Outlook add-in module for Create

Through the Outlook add-in, you can create new cases and tasks directly from your email Inbox. You can indicate the fields that will be auto-filled and the information from the email to fill them. This topic walks you through configuring the Create Case and Create Task **modules** for the Outlook add-in.

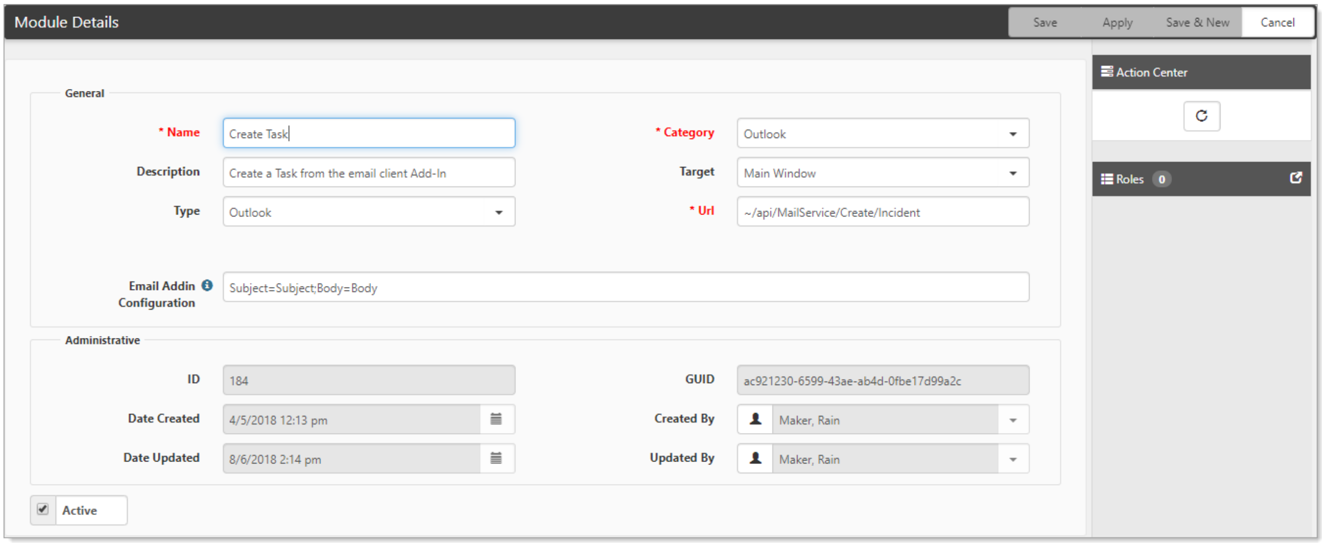
The Outlook add-in uses a system module when creating a new case or task directly from the add-in. You must be a global admin to perform this configuration. Additionally, your global admin can configure a Create module for creating any workspace dataform from the Email add-in, such as Create WC Claim.

To configure the Outlook add-in modules:

1. Go to **System Admin** > **Modules**.
   The Modules dashboard opens.
2. In the **Search** box, filter the Modules list by typing **Outlook**.
   Modules that apply to Outlook are displayed. The two relevant modules are Create Case and Create Task.
3. Open **Create Case**.
   The Module Details form for Create Case opens.



4. Complete the form and click **Save**.
5. Open **Create Task**.
   The Module Details form for Create Task opens.



6. Complete the form and click **Save**.

Name	Defaults to **Create Case**.
Category	Defaults to **Outlook**.
Description	• For Create Task, defaults to **Create a Task from the email client Add-In**. • For Create Case, defaults to **Create a Client Service Case from the email client Add-In**.
Target	Will this open in a new window or in the main view? The add-in opens a new instance of the system, so this is set to Main Window, ensuring the case or task is opened normally (within the page frame).
Type	Defaults to **Outlook**.
Url	This is used by the Outlook add-in to find the appropriate code path when generating a new dataform or task. This field is pre-configured and should not be altered, or unexpected behavior occurs.
Email Addin Configuration	This field enables the global admin to selectively fill fields in the newly created case or task using data from the selected email. Pair case or task fields with email fields. Separate the pairings with a semi-colon, no spaces between them, and no ending semicolon. Example: Case/TaskField=EmailField Example: Subject=Subject;CaseInfo=Body;EmailAddress=Sender;z_ClientReportDate=DateSent

	In the example: • **Subject** of the case is filled with the Subject line in the email. • **Issue** of the case is filled with the Body of the email. • **Email Address** on the case is filled with the From address on the email. • The custom **Client Report Date** field is filled with the DateSent of the email. Available fields retrieved from the email are: • **DateSent**: mailboxItem.dateSent • **Subject**: mailboxItem.subject • **Body**: mailboxItem.body • **Sender**: mailboxItem.from • **Recipient**: mailboxItem.to

7. Click **Save**.

> For Create Case or Create Task functionality to appear in the add-in, the respective module must be active in **System Admin** > **Modules**.

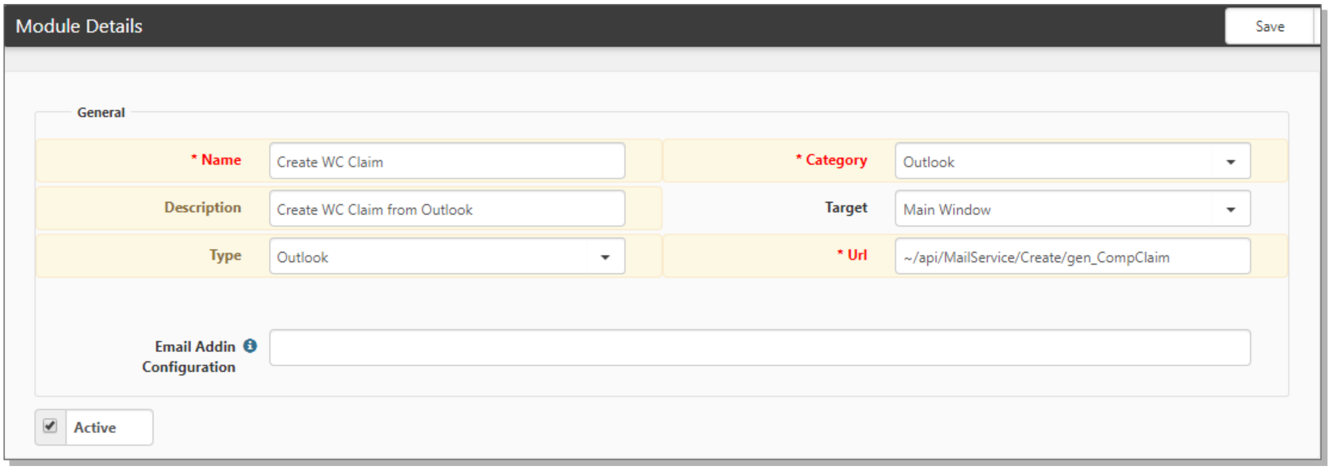
To add custom Outlook modules:

1. Go to **System Admin** > **Modules**.
   The Modules dashboard opens.
2. Click **Add**.
   The Module Details form opens.

Name	Enter a name that fits your new module. Example: Create WC Claim.
Category	Select **Outlook**.
Description	Enter a description of the new module.
Target	Will this open in a new window or in the main view? The add-in opens a new instance of the system, so this is set to Main Window, ensuring the case or task is opened normally (within the page frame).
Type	Select **Outlook**.
Url	This is used by the Outlook add-in to find the appropriate code path when generating a new dataform or task.

	For a new module, such as Create WC Claim, type `~/api/MailService/Create/gen_CompClaim`.

3. Click **Save**.



Publishing the Outlook add-in through Exchange Admin

To begin using the Outlook add-in in your environment, you need to publish the add-in through the Exchange Admin > Manage Add-ins. This topic provides step-by-step instructions on installing this add-in in the Office 365 environment.

Microsoft now supports publishing Outlook Office add-ins through the Microsoft Store. This method of centralized deployment allows you to define groups that can use the add-in and is recommended for clients that use a hosted environment from a third-party IT provider. When using centralized deployment to publish through the Microsoft store, the provider should select the URL method of publishing and use the URL provided in this article. It is critical before proceeding with any method of publishing Outlook Add-ins that the server through which you will publish the add-in is up to date with the latest Microsoft service packs and updates for exchange. Instructions for centralized deployment through the Microsoft store may be found here.

> You must use the following instructions for distributing the Add-In though Exchange Admin when publishing the Outlook Add-In. Any deviation from this procedure can produce unexpected results and falls outside the scope of support for this product.

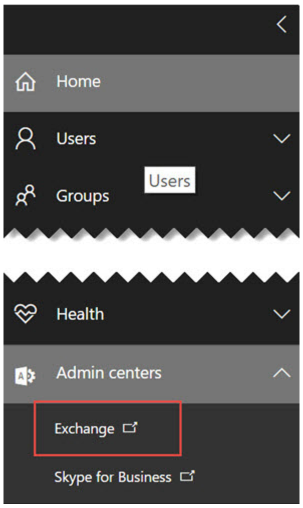
Per Microsoft, the Outlook add-in deployment requires:

- Office 365, Exchange Online, or Exchange Server 2013 or later
- Outlook 2013 or later

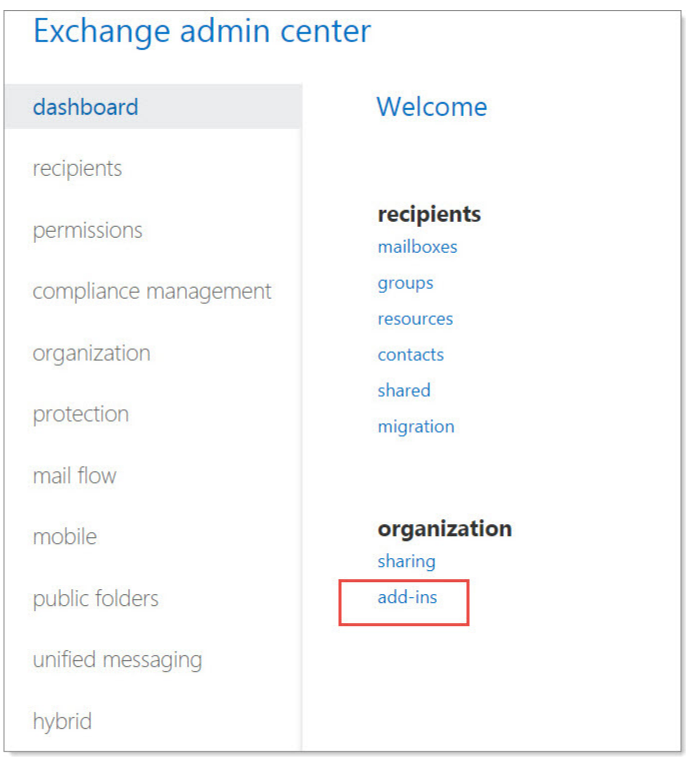
It is also highly recommended that you apply the latest service pack / patches for Exchange server to ensure you have Microsoft's latest deployment code. More details about this and the technology used for these add-ins can be found here: https://docs.microsoft.com/en-us/outlook/add-ins/

To publish the Outlook add-in through Exchange Admin:

1. Open the Office 365 Admin Center and navigate to **Admin Centers** > **Exchange**.

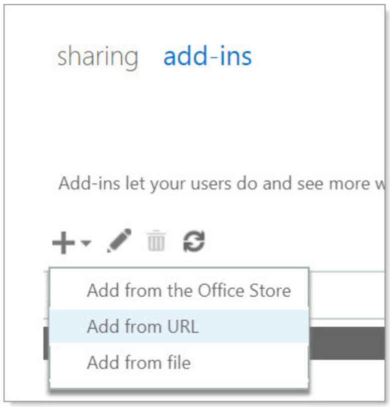


2. In the **Exchange Admin Center Dashboard**, under **Organization**, select **add-ins**.

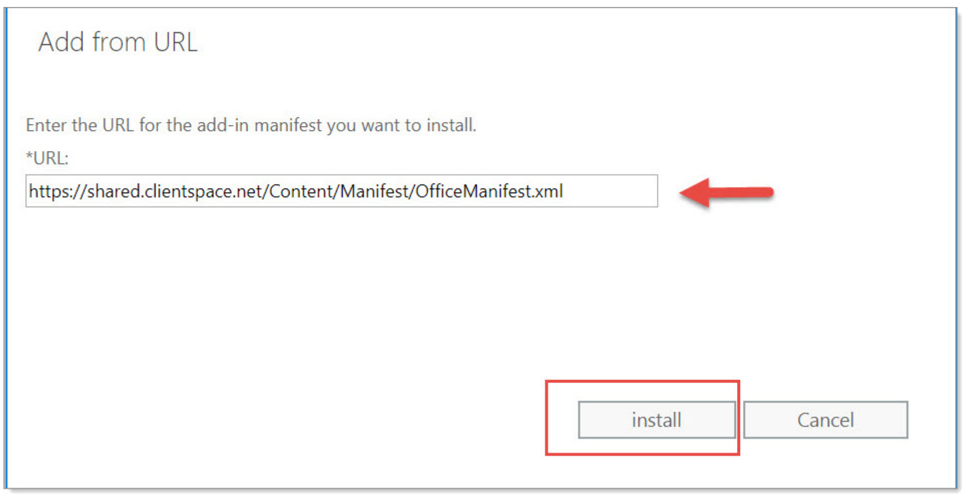


You are presented with a list of currently available add-ins.

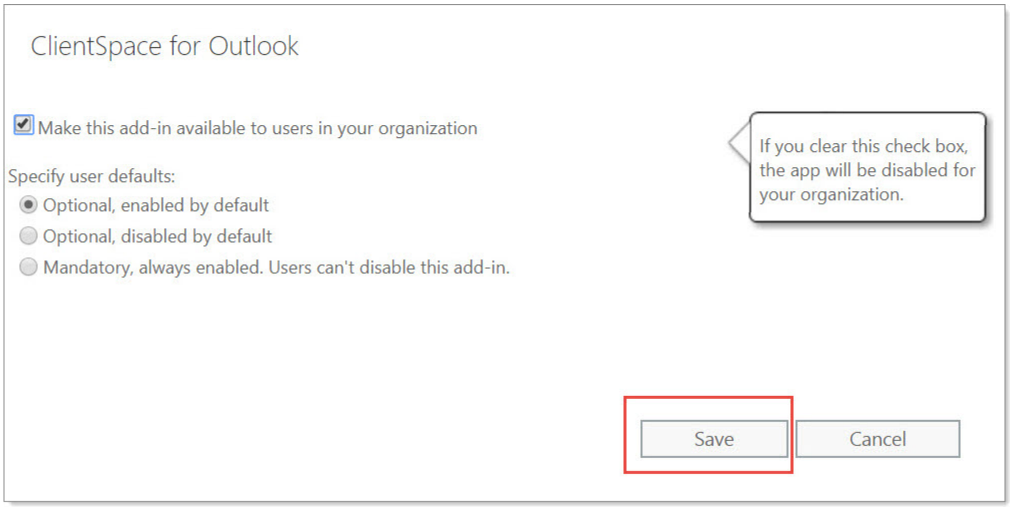
3. To add the new add-in to this list, click **+** and select **Add from URL**.



4. In the Add from URL dialog, complete the URL field using the following web address: `https://shared.clientspace.net/Content/Manifest/OfficeManifest2.xml`



5. Then click **Install**.
6. At the options selection screen, select the **Make sure this add-in available to users in your organization** option.
7. Select the appropriate install option for your environment.



Available options are as follows:

- **Optional, enabled by default** (*recommended): Users of Outlook via ofOffice365 online will automatically have access to the add-when using Outlook on the web. When enabled on their online account, the add-in will automatically be installed to their desktop Outlook. Desktop-only users will need to manually install the add-in using these instructions (click link to open). Once installed they may uninstall.
- **Optional, disabled by default**: Users of both Office365 online and desktop Outlook will need to manually install the add-in using these instructions (click link to open). Once installed they may uninstall.
- **Mandatory, always enabled**: Users of Outlook via Office365 online will automatically have access to the add-when using Outlook on the web. When enabled on their online account, the add-in will automatically be installed to their desktop Outlook. Desktop only users will need to manually install the add-in using these instructions (click link to open). Users will be unable to uninstall the add-in.

Chapter 14
Widget layouts

Widgets deliver targeted information within ClientSpace, which alleviates the need for custom programming to present departmental dashboards or dataform headers. You can present data using configurable widget layouts using condition expressions. Condition expressions enable presenting many views of a home page, workspace landing page, or dataform header, depending on department or role security.

Adding widget layouts

This procedure involves adding the widget layouts, browsing the library, configuring the widget and widget layouts, and publishing.

To add widget layouts:

1. Go to **System Admin** ⚙ > **Widget Layouts**.
   The Widget Layouts dashboard opens. From here, you can add and manage widget layouts for your ClientSpace installation.
2. From the Widget Layouts list, you can do the following:
   - **Search / More**: Works as the standard ClientSpace searches. By default, the list only displays published widgets.
   - **Add**: Click to add a new widget layout.
   - **Edit**: Select a widget from the list and click to edit an existing widget layout.
   - **Delete**: Delete a selected widget layout.
3. To add a new widget layout, click **Add**.
   The Widget Layout Details form opens.
4. Complete the form:

Name	Name of your new layout. This should be descriptive of layout type and audience, for example, *Payroll Home*.

Target Type	Target Type determines where the configured widget layout is displayed within the ClientSpace application, as well as what display conditions are available for use: • **Workspace**: Adds the widget to the Workspace Landing page based on the assigned Weight and Conditions set. • **Home**: Creates a Home page that displays based on the assigned Weight and Conditions set. • **Dataform**: Creates a dataform header widget layout that displays when that dataform opens based on the assigned Weight and Conditions set.
Weight	Determines the priority with which layouts are presented to the ClientSpace user, meaning their placement in the list. All things being equal (conditions), the weight given the layout determines what is presented. The greater the weight number, the more likely the dashboard is selected. For example, a weight of 20 is more likely to be selected than 15.
Add Widgets	Select and add widgets from the widget library to your widget layout.
Set Conditions	Use Set Conditions after you have added a widget layout to determine the conditions under which a layout is displayed. These conditions range from departmental or role-based to field value expressions, such as the status of a client. The conditions that are available for use will vary based on the selected Target Type.

Browsing the widget library

Next, let's browse the widget library, which is the current list of available widget types that you can add to layouts. You can view the widget library from the Add Widgets action in the Widget Layout Details form. This procedure continues from the previous steps.

To view the widget library:

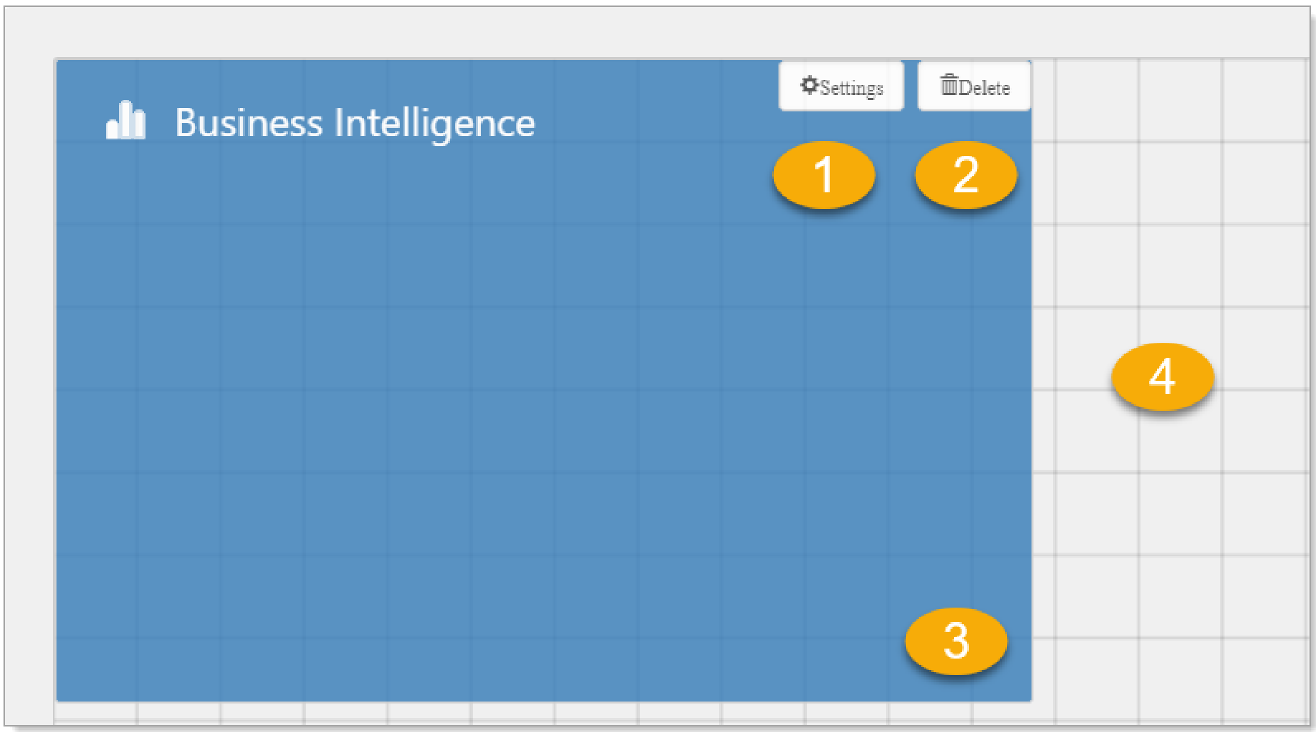
1. From the **Widget Layout Details** form, click **Add Widgets**.
   The Widget Library is displayed showing the current list of widget types that are available, accompanied by a brief description of what the widgets display.
   - **Search**: While the widget library is currently small and easily manageable, we envision the list will grow to the point you may need to search to find the widget type you want to add.
   - **Add Widgets**: Select one (or more) widgets and click to add the widget(s) to your layout. You can then re-arrange the widgets to your liking.

2. After you add widgets, you are returned to the Widget Layout Details form. The newly added widget appears in the grid.

Configuring the widget and widget layouts

To configure the widgets and widget layouts:

1. From the grid, the Global Administrator can determine the size and placement of the selected widgets.



2. Follow the numbers in the image and table.

1. Settings	The settings control allows you to add settings to Widget Types that require additional configuration. If the Widget type does not require configuration, the settings control does not appear.
2. Delete	Remove this widget from the layout.
3. Re-size	Drag the arrow in the lower right corner of the widget to re-size the widget control. The system automatically snaps to the nearest grid line when you release it. Some widget types cannot be re-sized, such as Notifications and Watch. Attempts to re-size these widget types in your layout will lead to

	unexpected behavior in the application.
4. Grid area	The grid area represents the white space on the page for adding widgets to your layout. To change your Widget Layout, drag widgets to this grid area.

Publishing the widget layout

Next, you are ready to publish the new widget layout. You can publish the widget layout after it is saved.

To publish the new widget layout:

1. After you have configured your widget layout, click **Save**.
   You are returned to the Widget Layouts list. Your new Widget Layout is displayed in the list as unpublished. The newly added entry is displayed in italics and bold – meaning it is unpublished.
2. To publish the new widget layout, select the **Published** option (far right column).
3. To unpublish, clear the **Published** option.

Adding security and display conditions

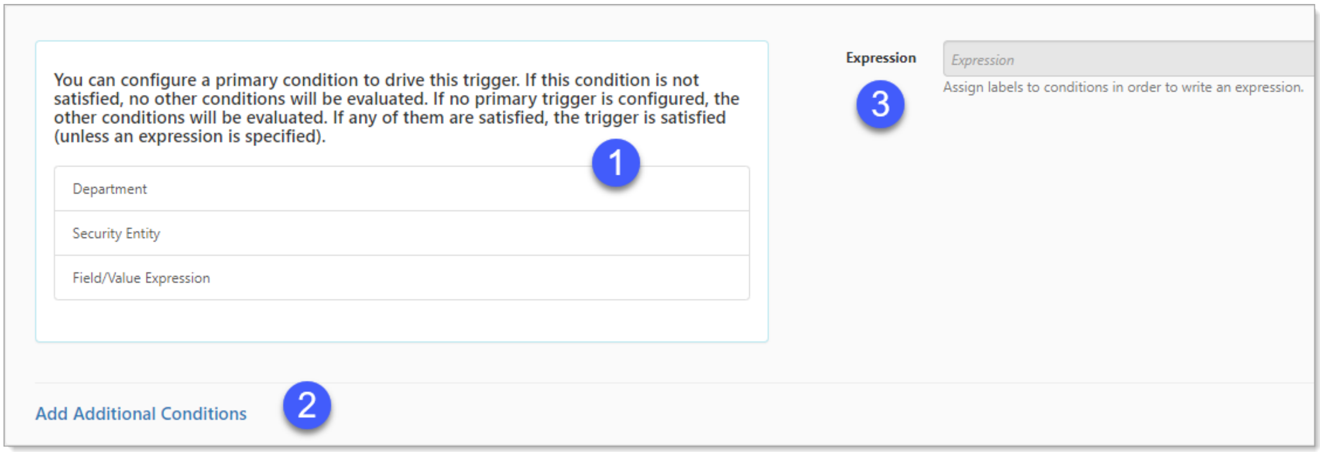
Adding conditions to your widget layout is essentially adding the trigger conditions that determine if the widget displays.

Primary condition

This procedure continues from the previous steps, from an open Widget Layout Details form.

To set conditions:

1. Open a widget layout.
   The Widget Layout Details form opens.
2. To set conditions on your widget layout, click **Set Conditions**.
   The Execution Trigger Detail form opens.



Area	Function
1. Primary Condition	The primary condition must be met before all other conditions are evaluated. Primary Conditions are not required, but if present they must be satisfied.
2. Add Additional Conditions	Additional conditions allow you to configure complex display conditions, which when combined with the weighting system provides the ability to create complex trigger conditions when used in an expression. When adding Additional Conditions, you will have a **Label** field to complete. The Label value is used when constructing Expressions.
3. Expression	As conditions (other than the primary) are added, they act as an **OR** condition. For example, adding three additional conditions without an expression would mean: If 'This' or 'That' or 'The Other Thing' – then display the widget. Expressions can be used to create more complex conditions under which the widget will display. Example: "('This' AND 'That') OR 'The Other Thing'" For an extensive discussion about conditions, see the topic Condition expressions.

Departments and Security Entities

Departmental and Security Entity Conditions work in a similar fashion.

1. From the open widget layout, in the **Execution Trigger Detail** form, select **Department** or **Security Entity**.
   The Trigger Condition form opens.

2. Departmental and Security Entity Conditions work in a similar fashion. For type **Department** or **Security Entity** select the associated value. These are always an **Equals** condition.

Trigger Condition	Options
Department	Select the user's Default department as selected on the user profile. If a Department trigger is set, the user must be in that department to satisfy the condition.
SecurityEntity	Select a Security Entity associated with a role in which the user is a member. If an Entity trigger is set, the user must be in a role with at least View access to that Entity.

Expression

When adding additional conditions, the **Expression** field is exposed. The option is used when building condition expressions.

Field Value Expressions

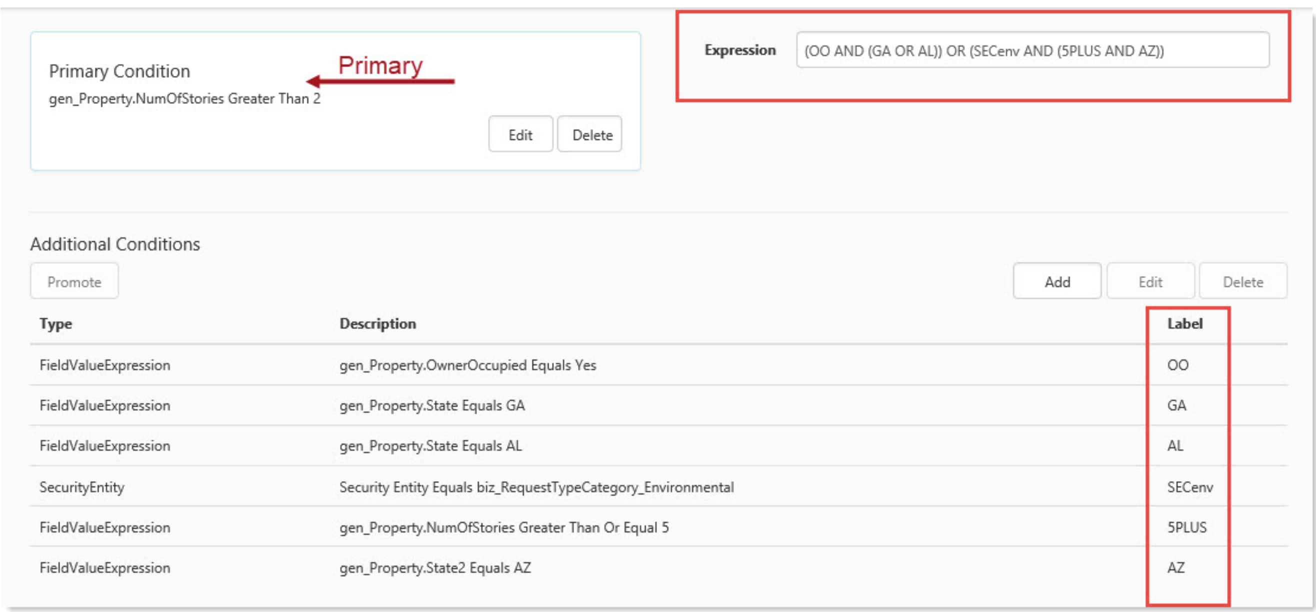
Commonly used in Workflow, Field Value Expressions are the most robust of the trigger conditions.

Field	Description
Type	When FieldValueExpression is selected as the type, additional fields display to allow configuration of the source dataform and associated elements.
Source	Select the Dataform that determines the triggering condition.
Trigger Field	Select the trigger field from the Source dataform.
Operator	Select the logical operator: • Equals • Does Not Equal • Contains • Starts With • Empty • Not Empty • Is Dirty • Greater Than, and so on

Field	Description
	The operators are field specific. If the Trigger field selected is a Text field, numerical operators will not be available.
Trigger Value	Trigger Value is the value to the right of the operator in the equation. The trigger value determines whether the condition is met. For example: **Pricing State Source | State Field | Equals Operator | "FL"** Trigger Value means "If the Pricing State, State field Equals Florida."
Expression Label (option)	When adding additional conditions, the Expression Label field is exposed. This is used when building condition expressions.

Condition Expression: Bringing it all together

After additional conditions have been configured with labels, you can use these labels to build complex Condition Expressions.



In the Dataform header widget example:

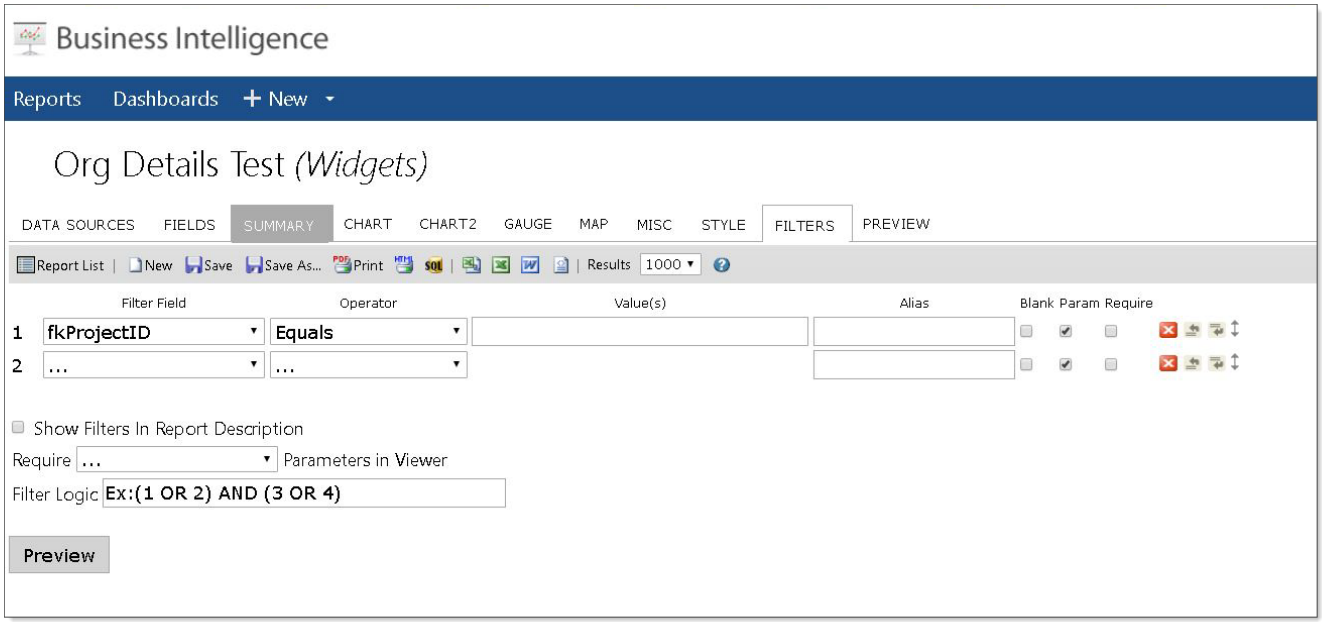
- The **Primary condition** is the **Number Of Stories** field, which must be greater than 2.
- If this primary condition is met, the system then analyzes the **Additional Conditions** using the Condition Expression. This condition expression is built using the **Expression** labels on the additional conditions and applying the appropriate logic. In the example, this would be:
  - **EITHER** (the Owner Occupied field = 'Yes' AND (the Property State field equals 'GA' OR 'AL'))

- **OR** (the User has at least view rights to the biz_RequestTypeCategory_Environmental entity AND (Number of Stories field is Greater than 5 AND the Property State field equals 'AZ'))

In this way, very complex trigger conditions can be built to display or hide the appropriate Widgets.

Configuring BI Reporting Widgets

Report widgets require additional configuration when creating a BI Dashboard. Any part of a report can be added to a widget, including Charts.

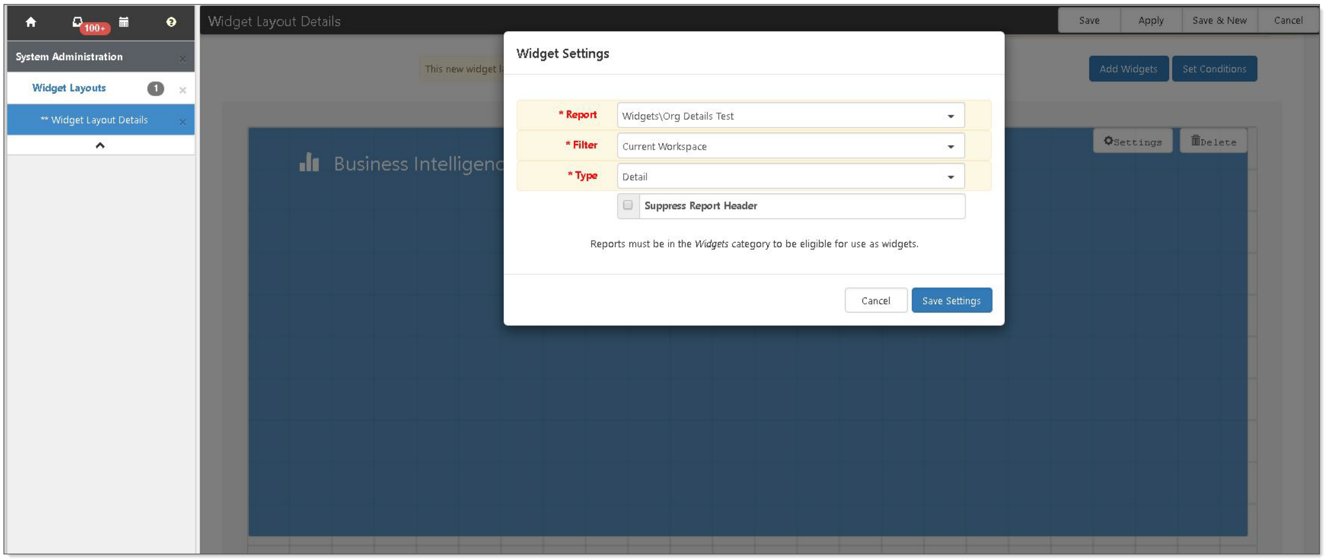


From a BI report:

1. When configuring a BI report inside a BI Widget, to filter on #currentworkspace,
   a. In **Filter Field**, add the **fkprojectID** from the client master.
   b. In **Operator**, select **Equals** .
2. Leave **Value** blank.
3. Leave the **Parameter** selected.

To configure a BI report widget:

1. From the **Widget Layout Details** form, click **Settings**.
   The Widget Settings form opens.



2. Complete the fields:

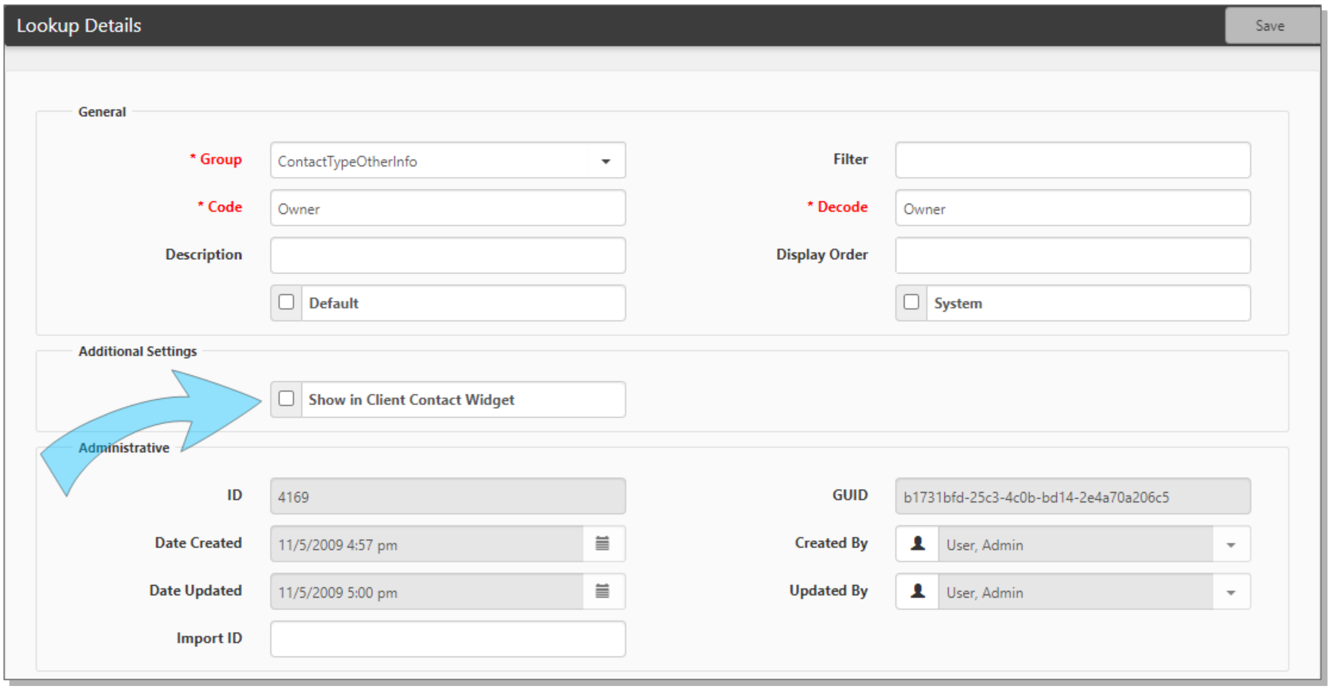
Report	Select the report to be used in your widget. These widgets adhere to report security as well as report filters, such as fkprojectid or pkorganizationid equals blank. The widget fills in this filter when the report runs using its own Current Workspace filter logic. There is no need to add a value into the report filter in BI. **NOTE**: if you try to add a value, such as #currentworkspace into the BI report filter, it will not work in the widget. BI System Administrators and Global Admins can see the report filters.
Filter	Select **Current Workspace**.
Type	Select the report part you would like to include such as Chart, Summary, or Detail.
Suppress Report Header	When enabled (selected), the report header does not display. Default setting is disabled (cleared).

3. When you have completed your configuration, click **Save Settings**.

If you have any questions, please submit an Extranet service ticket to ClientSpace.

Configuring the Client Contact widget

Certain contacts appear in the Client Contact Widget, but how does the system determine which contacts to show? This topic describes how to configure which contacts are displayed on the Workspace Landing Page widget.



To configure the client contact widget:

1. Go to **System Admin** > **Lookups**.
2. Search for a lookup group of **ContactTypeOtherInfo**, and click (**Open**).
   The Lookup Details form opens with the contact type you selected.
3. Select the option **Show in Client Contact Widget**.
4. Click **Save**.

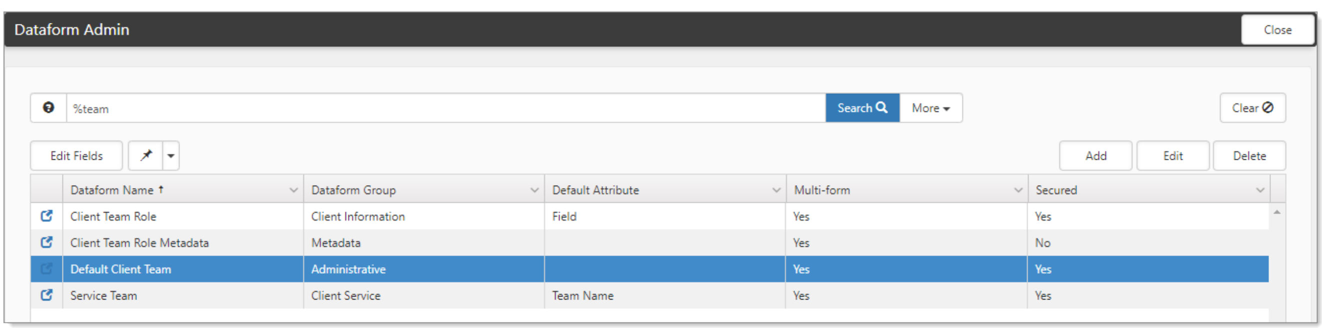
Configuring the Client Team widget

The ClientSpace workspace landing page is the central hub for Client data. This is the home of the configurable Client Team widget and it allows up to 10 Client Team members to be displayed. By default, it shows 4.

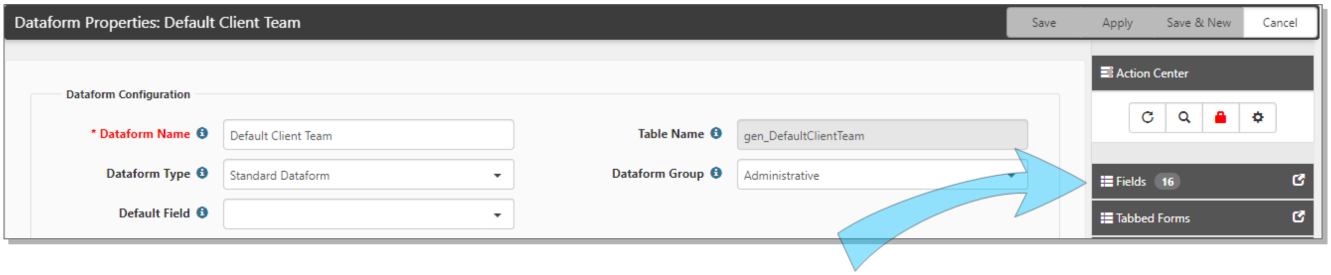
The header of the Client Team widget contains a header bar with a link to jump to the Client Team dataform as well as an expansion control that allows the panel to show more team members. Configuring the widget involves configuring the Client Team Role lookup value and associated metadata.

To configure the Client Team widget:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens. We will select a Client Team field to display on the workspace landing page widget. Alternatively, you can add a new Client Team member by adding a new user field to the dataform. Our examples use Snack Manager, which has already been added.

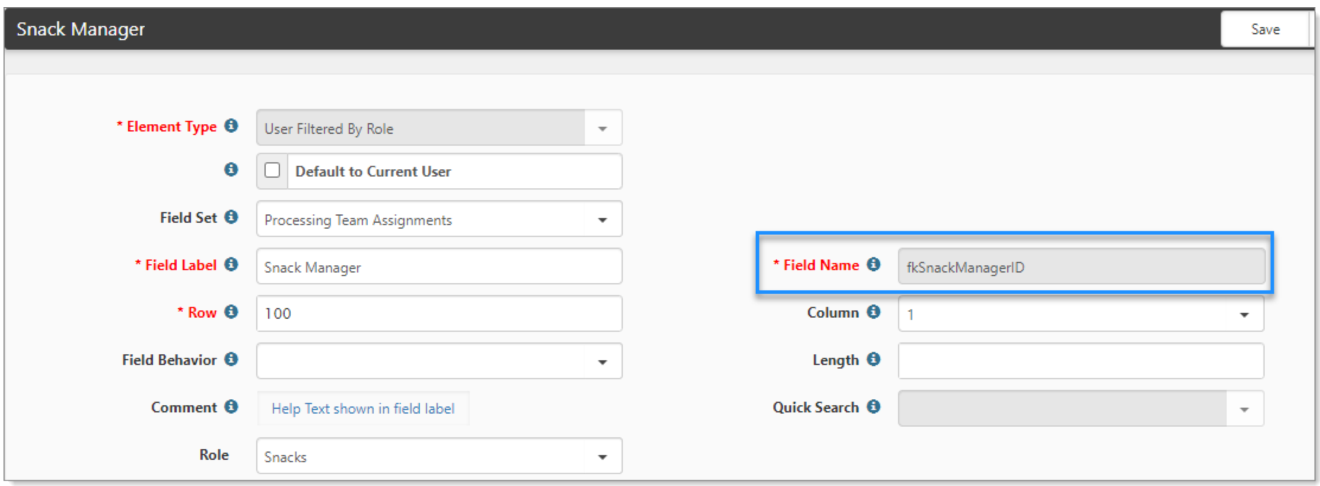
2. Open the Team dataform and in the Action Center, click **Fields**.



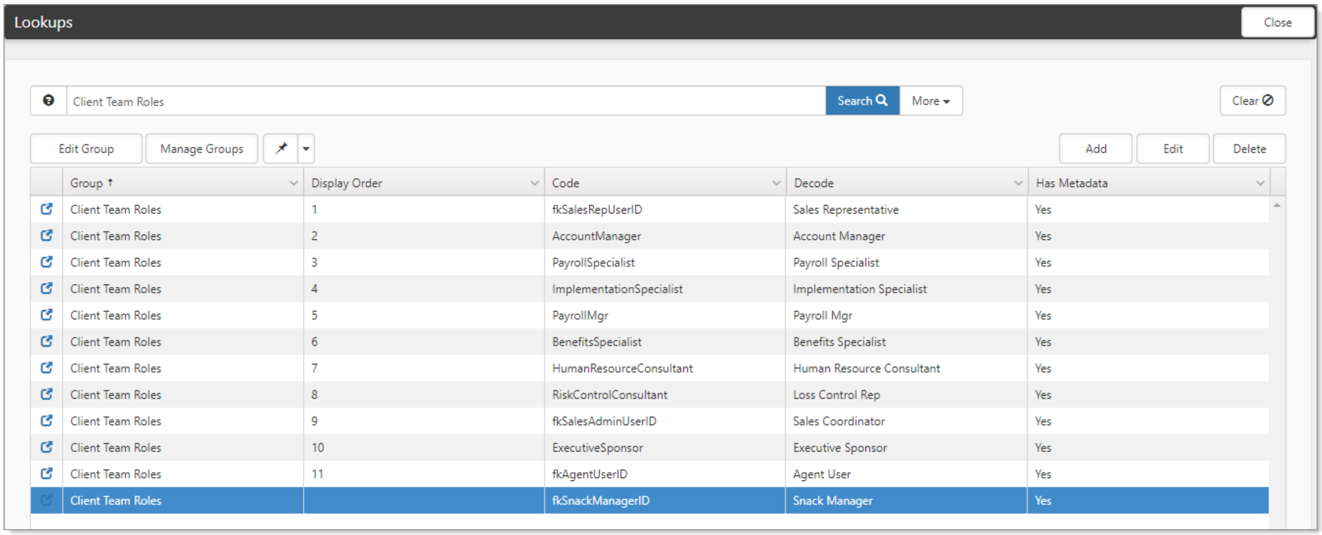
The list of fields displays.

3. Select a field and click (**Open**).

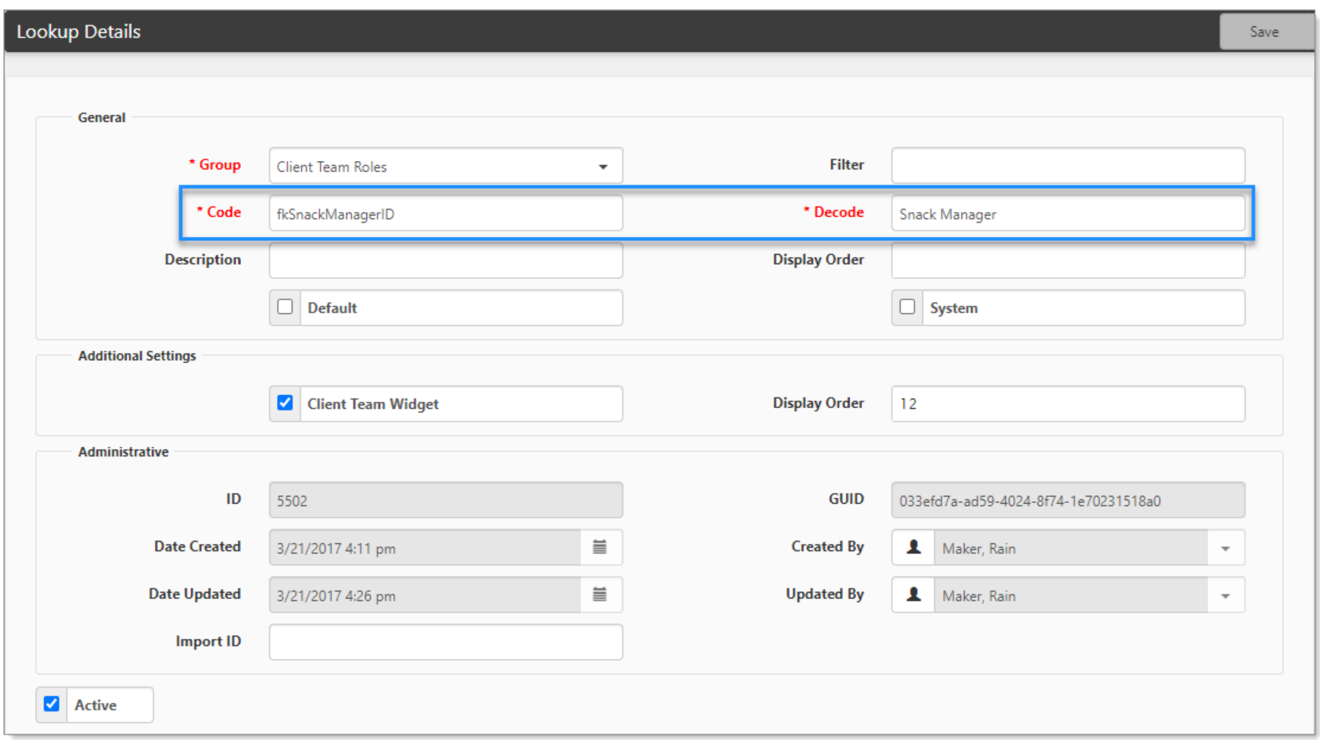
Our example uses Snack Manager.



4. Copy the field name.
   Our example shows the field as fkSnackManagerID.
5. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens.
6. Filter the list to match your selection. Our example uses Client Team Roles, fkSnackManagerId.



7. Open the record.
   The Lookup Details opens.
8. Find the corresponding Client Team Field lookup (or create a new one) making sure to paste the field name you copied in the last step as the Code value. Our example uses Code as fkSnackManagerID and Decode as Snack Manager.



9. In **Additional Settings**, apply any lookup changes and display order (up to 10 Client Team fields).

10. **Save** your changes and refresh the Client Team dataform.

Chapter 15
Importing data

Need to know about imports and file uploads? Look no further! The following topics guide you through best practices, importing CSV files, configuring nightly imports, and configuring the import mapping record.

Best practices for standard imports

This process discusses the standardized data sets that should be captured with any client file upload. The data falls into two main categories, and several scripts sets within those categories: Initial upload scripts and Ongoing upload scripts.

Initial and ongoing script files import different sets of data. For example, initial load of the employee records grabs all employees of Active clients. Thereafter, the ongoing script grabs all active and any employee termed in the last three months. Further details of the differences are as follows.

Script	Description
Company_initial	All Clients, active and termed not specifically excluded.
Company_ongoing	Smaller subset of initial data – but the filter criteria do not change as the data set is small and Client termination data needs to be captured.
Contacts	Primary contact and address information for Clients main division (Division 0)
Employee_initial	All employees of All Clients (Active and termed)
Employee_ongoing	All employees of Active Clients that are active or have termed in the last three months. If the client is utilizing the Workers' Compensation claim system, they may want to broaden the parameters to include termed clients.

Script	Description
Employment_initial/ongoing	All employees of Active Clients that are active or termed in the last three months.
Employee Deduction Vouchers_Initial	All deductions from checks in the last year. This can be filtered for specific deduction codes.
Employee Deduction Vouchers_ ongoing	All deductions from checks in the last 21 days. This can be filtered for specific deduction codes.
Locations	All Physical locations, marking primary location as such and all other locations as Alternate.
Voucher_initial	All payroll voucher data for employees that have collected checks with an amount greater than 0 in the last 365 days. More historical data can also be uploaded, but the standard initial set is the last 365 days – uploading larger historical data sets will require these sets to be broken down into acceptable size chunks.
Voucher_ongoing	All payroll voucher data for employees that have collected checks with an amount greater than 0 in the last 21 days.
Pricing Imports	While pricing data can be imported, this is not recommended due to the inherent issues involved in data mapping. A recommended best practice is to not import pricing data, but to enter the data into ClientSpace on first re-price.

Managing import data

ClientSpace provides a powerful toolset to import and connect data with external systems. It can be tricky to manage. Connecting imported data to existing data in the system is useful and requires understanding your data and how the underlying tables relate.

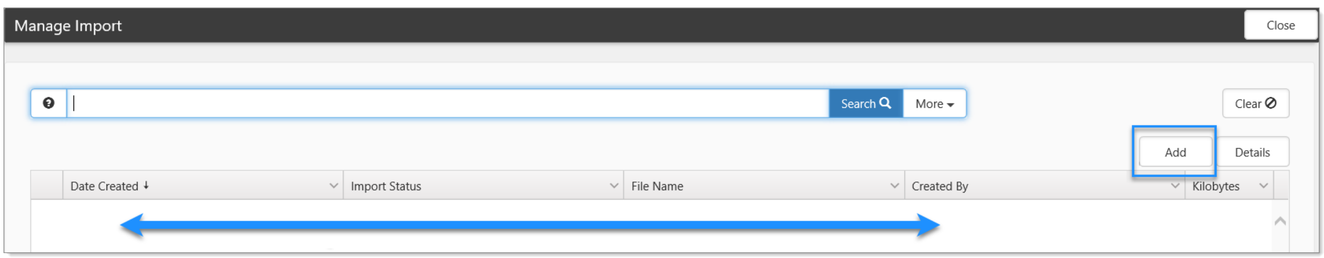
When configuring imports, it is essential to understand the data relationships within your installation. Each record to be imported must have a unique identifier (ImportID) as well as at least one column containing a method for relating that imported record to another record in the system, be it an Organization, Workspace, Contact, or a combination of these. An incorrectly configured import can corrupt or overwrite existing data, which can then be difficult or even impossible to fix or replace.

Now is the time to thoroughly map how the imported records tie to the existing data. If you need assistance, please log an Extranet case. It is much easier (and frankly less expensive) to request help in setting up an import than incorrectly importing records and then requesting help cleaning up the associated fallout. This topic provides an overview of the functionality for managing system imports.

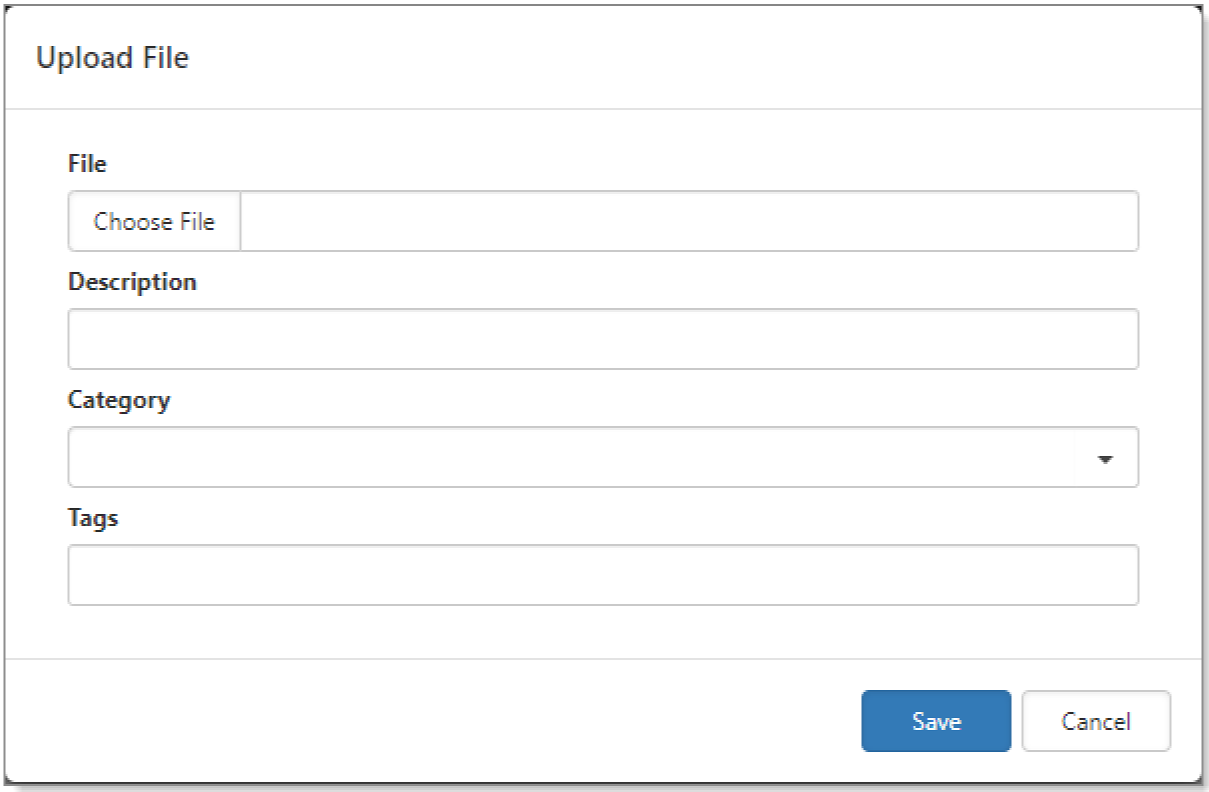
> To perform data imports, you must be a Global Admin or have the **SYS_ImportManager** security entity with the **Admin** permission. See Configuring import management for non-Global Admins.

To manage data imports:

1. Go to **System Admin** > **Imports** > **Manage Import**.
   The Manage Import dashboard opens. If you have never imported a file, the dashboard opens without any files in the list. When there are no files, your options are limited to Adding a file.



2. Click **Add**.
   The Upload File dialog opens.



3. Complete the form fields:

Choose File	Browse your local and network drives and select a file.
Category	You can select a category for the file. Optional.
Description	Include a brief description of the file. Optional.
Tags	Add any Tags that may relate to the file. Optional.

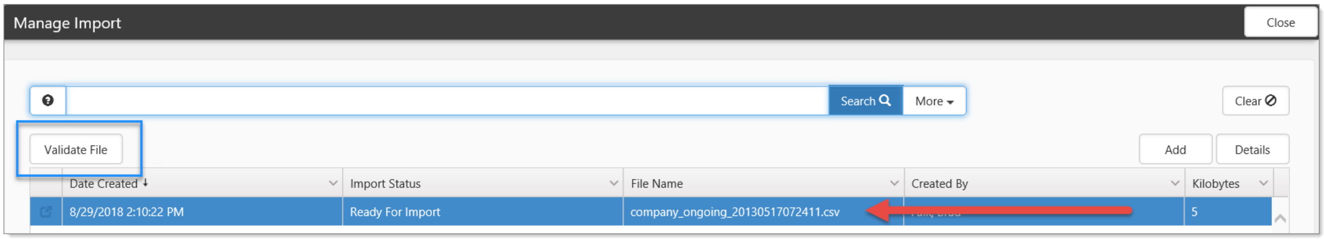
4. Click **Save**.

   If you selected a file whose file name does not match one of the configured import mappings in your installation, the following error displays:

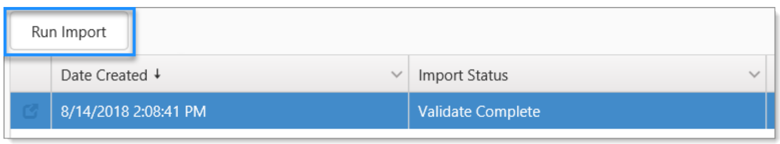
   ```
   Please correct the following error(s): The file you are attempting to upload
   does not match a current Import Map Header and cannot be uploaded.
   ```

5. Log an Extranet case if you received this error and are not sure why.
6. When a file has been properly added, **Validate File** becomes available.
   Validation compares the file structure to a preexisting import configuration to ensure that the

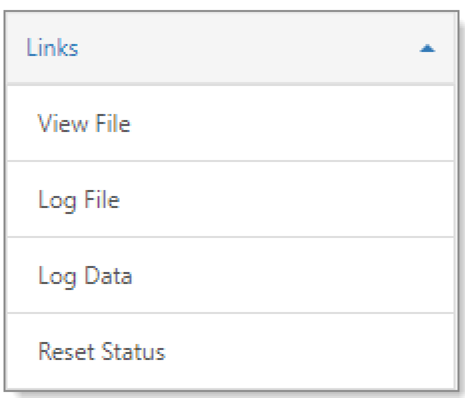
file has all the required columns. Additionally, high-level validation is performed to ensure that the data types match the field into which the data is imported.



Successful validation enables the **Run Import** function.



7. With the record in Validate Complete status, click **Run Import** to begin the import process. The action button reflects that the import process is **Running**. When complete, the action displays as **Completed**.
8. To review the success of your import, open the record and use the action item Links on the right: View File, Log File, Log Data, and Reset Status. Log Data presents any errors during the import.



9. From the dashboard, to view the log file for import errors, click **View Log**.

> Review the data that you just imported for completeness. Navigate to the dataform in the workspace and verify your work. Confirm that you have the expected number of records and that the appropriate data appears in each of the imported fields.

Configuring import management for non-Global Admins

You can allow users to upload and run imports without giving them the Global Admin rights. The SYS_ImportManager entity provides access to manage imports through the Import Management module.

The steps to do this include:

1. Configure a new Import Management module. (Global Admins must perform this step.)
2. Add the **SYS_ImportManager** entity to an existing role or add a new role. Ensure the appropriate users are assigned to the role. (Global Admins must perform this step.)
3. Add the Import Management module to your user profile. (Non-Global Admin users can perform this step.)

Step 1: Configure Import Management module

You need to be a Global Admin to perform this step.

To configure the Import Management module:

1. Go to **System Admin** ⚙ > **Modules**.
   The Modules dashboard opens.
2. Click **Add**.
   The Module Details form opens.
3. Complete the form fields as specified.

Name	Enter the recommended name **Import Management**.
Category	Select **Admin**.
Description	Enter the recommended description **View and manage import files**.
Target	Select **Main Window**.
Type	Select **NEXT**.
URL	Type `/Next/Admin/ManageImport/Index`.

4. Click **Save**.

Step 2: Create a new role (optional) or use an existing role

Determine if you need to create a new role or use an existing role. You need to be a Global Admin to perform this step.

To begin:

1. Go to **System Admin** > **Security** > **Roles**.
   The Security Roles dashboard opens.

To create a new role:

1. Click **Add**.
   The New Security Role form opens.
2. Complete the fields as specified.

Title	Type **Can Manage Imports**.
Description	Type **Users in this role can manage imports**.

3. Click **Apply**.
4. Go to **Step 3**.

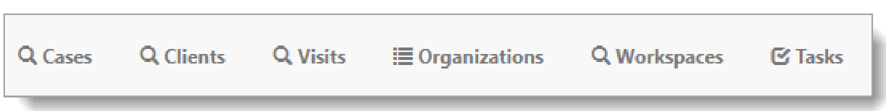
To use an existing role:

1. Select and open a role from the list.
2. In the **Action Center**, select **Entities**.
   The Security Role Entities dashboard opens.
3. Click **Add**.
4. The Add Role Entities dialog opens.
5. Select **SYS_ImportManager** and click **Ok**.
   You are returned to the Security Role Entities dashboard with the newly added Entity Name.
6. On the **SYS_ImportManager** row, select the **Admin** permission.
7. Click **Close**.
   You are returned to the opened role.
8. In the **Action Center**, select **Users**.
   The Security Role Users dashboard opens.
9. Click **Add**.
   The Add Role Users form opens.
10. Select the applicable users and click **Ok**.
    he newly added users appear in the Security Role Users list.
11. Click **Close**.
    You are returned to the role form.
12. To close the form, click **Cancel**.

Step 3: Add the new module to your user profile

Now that the Import Management module is available and the new security entity has been added to a role, users assigned to the new role can add the new Import Management module to their user profile.

User modules are selectable modules that you can configure by adding modules that you use most often to the modules bar. The modules bar is located at the top of the workspace, providing quick access to your favorite modules.

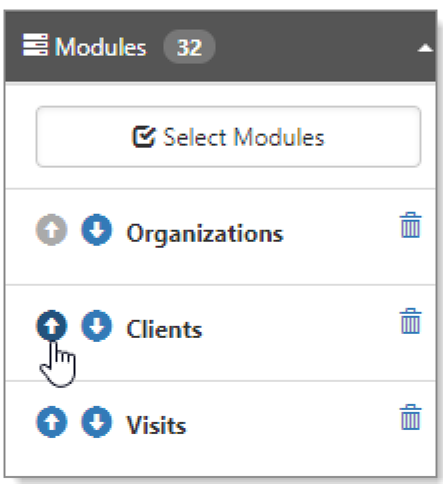


To add modules to your user profile:

1. On the modules bar, on the right side, click **<username>** > **My Profile**.
   The User Details form opens along with the Action Center panel on the right.
2. In the **Action Center**, click **Modules** > **Select Modules**.
   The Select Modules dashboard opens.
3. Locate the module and in the **Select** column, select the check box.
4. Click **Ok**.
   You are returned to the User Details screen. Your new module is listed in the Action Center, in the Modules group.
5. Click **Save**.
6. To see the new module in the modules bar, refresh your screen (press **F5**).

To manage the order of modules:

1. In the **Action Center**, in **Modules**, use the arrows to control the order. Overflow modules that do not fit in the modules bar appear in the **View** list.



2. Click **Save**.
3. To see the new module in the modules bar, refresh your screen (press **F5**).

CSV Import File Creation macro

To import .csv files into ClientSpace, the files must be appropriately formatted, with comma delimiting and quote wrapping the text. The following instructions walk you through creating a

CreateCSV macro and adding it to the Quick Access toolbar in Excel, which correctly formats the selected spreadsheet data into an importable format. The information is excerpted from the Microsoft Office online help and modified to include specific instructions for the CreateCSV macro. These instructions are designed for Office 2010 and later.

Macros and the Visual Basic Editor

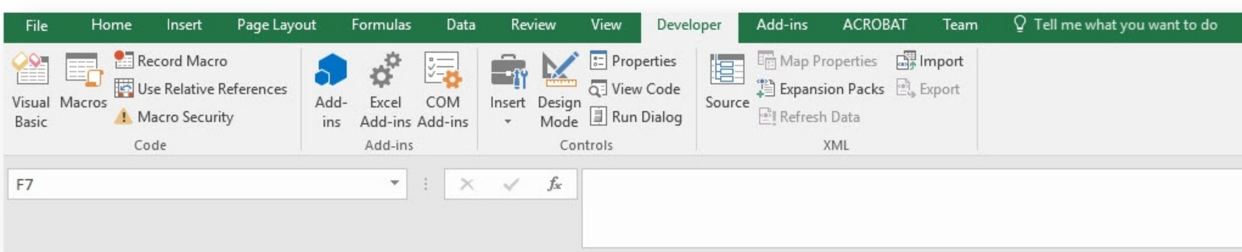
Microsoft Office allows you to run pre-recorded instructions on Excel data. To do so, you must write your code in a place and in a way that Office can understand; typically, by using the Visual Basic Editor. Although it is installed by default, many users do not know that it is even available until it is enabled on the ribbon.

Developer tab

All Office 2010 and later applications use the ribbon. One tab on the ribbon is the **Developer** tab, where you access the Visual Basic Editor and other developer tools. Because Office 2010 does not display the **Developer** tab by default, you must enable it using the following procedure:

To enable the Developer tab:

1. On the **File** tab, choose **Options** to open the **Excel Options** dialog box.
2. Click **Customize Ribbon**.
3. Under **Choose commands from**, select **Popular Commands**.
4. Under **Customize the ribbon**, select **Main tabs**.
5. Select the **Developer** option.
6. Click **OK**.
7. After Excel displays the **Developer** tab, note the location of the **Visual Basic**, **Macros**, and **Macro Security**.



Security Issues

- To specify which macros can run and under what conditions, click **Macro Security**.

Although rogue macro code can seriously damage your computer, security conditions that prevent you from running helpful macros can seriously undermine your productivity. Macro security is a complex and involved topic that you should study and understand if you work with Excel macros.

For the purposes of this article, be aware that if the **Security Warning: Macros have been disabled** bar appears between the ribbon and the worksheet when you open a workbook that contains a macro, you can click the **Enable Content** button to enable the macros.

Also, as a security measure, you cannot save a macro in the default Excel file format (.xlsx); instead, **you must save the macro in a file with a special extension, .xlsm**.

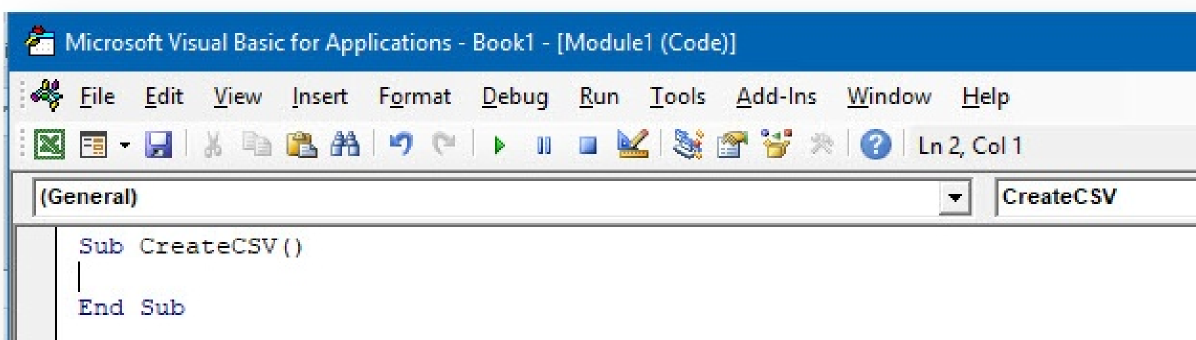
Visual Basic Editor

The following procedure shows you how to create a new blank workbook in which to store your macros. You can then save the workbook in the .xlsm format.

To create a new blank workbook:

1. On the Developer tab, click **Macros**.
   The Macro dialog box opens.
   For **Macro Name**, type **CreateCSV**.
   The Create function becomes available.
2. Click **Create**.
   The Visual Basic Editor opens with the outlines of a new macro ready.

VBA is a full-featured programming language with a correspondingly full-featured programming environment. This article examines only those tools that you use to get started with programming, and that excludes most of the tools in the Visual Basic Editor. With this caveat, close the **Properties** window on the left side of the Visual Basic Editor, and ignore the two dropdown lists that appear above the code.



The Visual Basic Editor contains the following code:

VB
```
Sub CreateCSV()
End Sub
```

Sub stands for *Subroutine*, which you can define for now as macro. Running the CreateCSV macro runs any code that is between Sub CreateCSV () and End Sub.

3. Now edit the macro so that it looks similar to the following code. Feel free to copy and paste the code below – everything between **Sub CreateCSV()** and **End Sub**.

VB
```
Sub CreateCSV()
            Dim lColumnCount As Long
            Dim lRowCount As Long
            Dim strFileName As String
            MsgBox ("This Macro will create a CSV version of the SELECTED ROWS
AND COLUMNS.  It will surround the cell data with quotes and separate each cell
with a comma.  Finally, it will replace any chr(10)s with chr(13)s.")
            strFileName = InputBox("Please enter the destination file
path.", "", "C:\Temp\Imports\" & LCase(ActiveSheet.Name) & ".csv")
            If (strFileName = "") Then
            Exit Sub
            End If
            On Error Resume Next
            Open strFileName For Output As #1
            If Err.Number > 0 Then
            MsgBox ("Error: The path you selected may be bad.")
            Exit Sub
            End If
            lColumnCount = Selection.Columns.Count
            lRowCount = Selection.Rows.Count
            Dim sValue As String
            For lRow = 1 To lRowCount
            For lColumn = 1 To lColumnCount
            sValue = Selection.Cells(lRow, lColumn).Value
            If lColumn = lColumnCount Then
                        If sValue = "" Then
                        Write #1, ""
                        Else
                        Write #1, sValue
                        End If
            Else
                        If sValue = "" Then
                        Write #1, "",
                        Else
                        Write #1, Replace(Replace(Replace(Replace(sValue, Chr
(10), Chr(13)), Chr(14), ""), Chr(24), ""), Chr(25), ""),
                        End If
            End If
            Next lColumn
```

```
            Next lRow
            Close #1
            MsgBox ("CSV file created successfully.")
End Sub
```

When used this macro will take whatever columns and rows are currently selected in the workbook and save them in the C:\Temp\Imports directory (if you have not already created this directory, an "Invalid path" error will be thrown). The CSV file will use the Worksheet name as the file name and save it with a `.csv` file extension.

4. Go back to the **Developer** tab in Excel and click the **Macros** button again.
   You should now see CreateCSV as an option.

You just created and implemented custom VBA code in Excel.

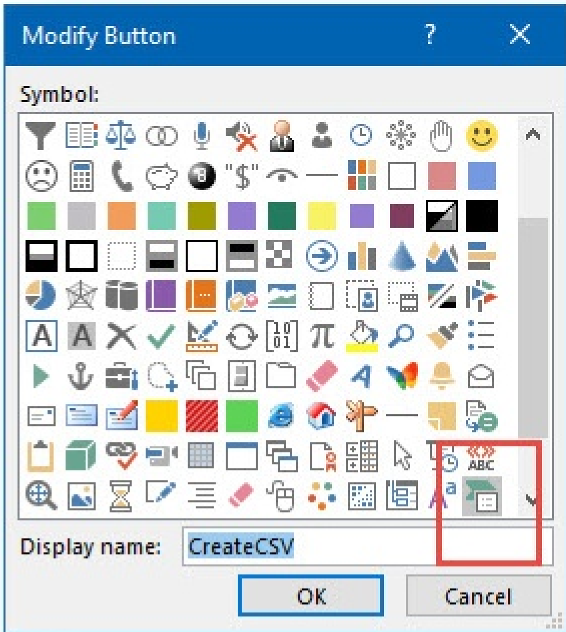
Making macros accessible

You can also get to the **Macros** dialog box from the **View** tab, but if you use a macro frequently, you might find it more convenient to access it with a keyboard shortcut or a **Quick Access Toolbar** button.

To create a button for the **CreateCSV** macro on the **Quick Access Toolbar**, use the following procedure. The following procedure describes how to make a button for a macro on the Quick Access Toolbar:

To create a button for a macro on the Quick Access Toolbar:

1. Click the **File** tab.
2. Click **Options** and then click **Quick Access Toolbar**.
3. In the list under **Choose commands from:**, select **Macros**.
4. Find the text that is similar to **Book1!CreateCSV** in the list that appears and select that text.
5. Click **Add >>** to add the macro to the list.
6. Click **Modify...** to select a button image to associate with the macro.



7. Click **OK**.
   You should see your new button on the **Quick Access Toolbar** above the **File** tab. This CreateCSV button will be available in any workbook now.
8. Now you can quickly run your macro at any time without using the **Developer** tab. Give it a try.

Configuring nightly imports

The ability to import data into ClientSpace provides a powerful toolset to connect your ClientSpace data with external systems, but it can be tricky to configure. This topic provides a primer for on-demand imports as well as some best practices to help make you a data imports expert. The ability to tie imported data to existing data in the system is critical but requires an understanding of your data and how the underlying tables relate.

Importance of ImportIDs

When configuring imports, it is **vital** that you understand the data relationships within your ClientSpace installation. Each record to be imported must have a unique identifier (ImportID) as well as at least one column containing a method for relating that imported record to another record in the system, be it an Organization, Workspace, Contact, or a combination of these. An incorrectly configured import can corrupt or overwrite existing data, which can then be difficult or even impossible to fix or replace.

If you have not spent the time to completely map this out or have questions about how the imported records tie to existing data, **STOP**, and log an Extranet case. Request either help in configuring your import or training about the import process. It is much easier (and frankly less expensive) to request help in getting an import set up right the first time, than it is to incorrectly import records, and then request help cleaning up the associated fallout.

Why won't my imports run?

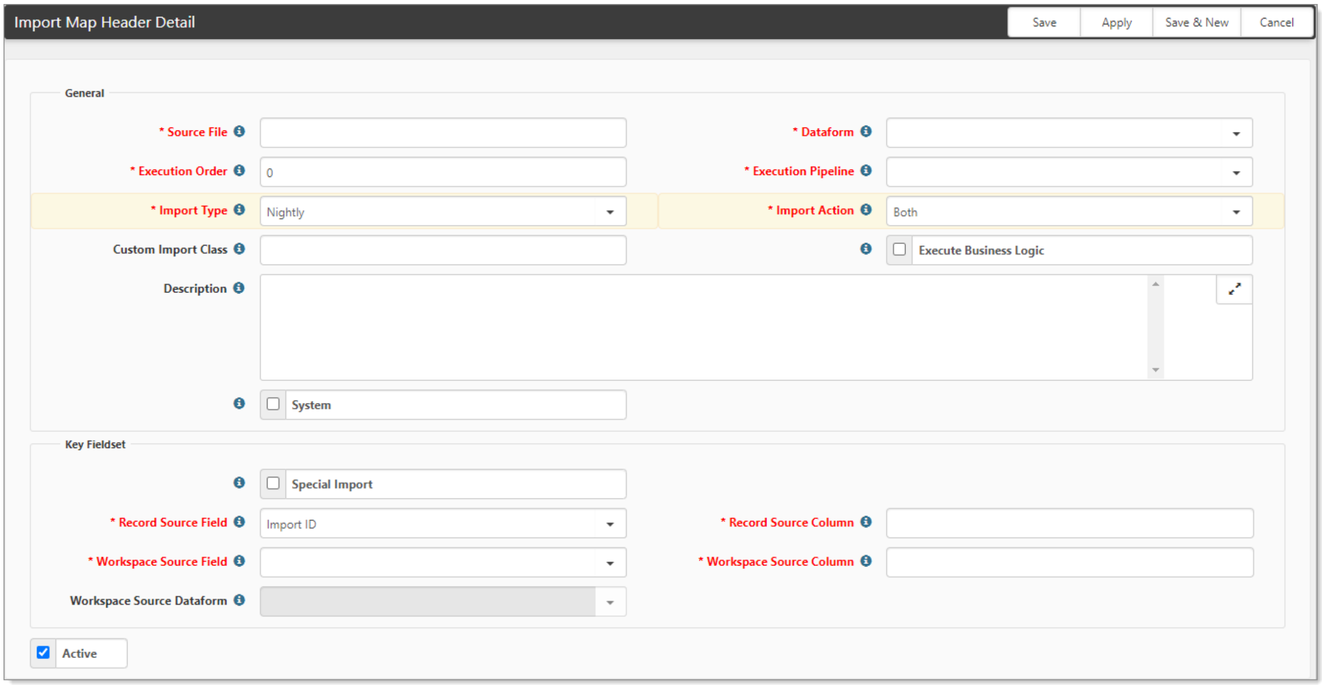
There is a maximum value of 10 mb for manual imports to ClientSpace. Attempts to validate manually or import a file larger than 10 mb alerts the user that the file has exceeded this limitation and stops the validation and run imports processes. Also due to the nature of imports, the standard user interface time out value is far too short to be useful, so the timeout value for processing manual imports is 90 minutes (5400 seconds). If a manual import takes more than 90 minutes to run, the system times out the process, stopping the import. Nightly imports that happen on a schedule are not subject to time or file size restrictions.

Configuring the Import Map Header

ImportIDs are used by the import process to determine if a record already exists in ClientSpace to update the record if it exists or create a new one if no match is found. Because of this, it is vital to have a unique ImportID for each row of the import file that is distinct across the entire dataset. ImportIDs should never be re-used unless the intention is to update an existing record.

To begin creating a custom import:

1. Go to **System Admin** > **Advanced** > **Configure Import**.
   The Import Map Header Search dashboard opens.
2. Click **Add**.
   The Import Map Header Detail form opens.



3. Begin creating a new import configuration by completing the fields.

Source File	This is the name of the file that you are importing. The file name should include the file extension (commonly CSV). A best practice is to add an asterisk before the file extension to account for variations in the file name.
Dataform	Select the dataform to receive the information. For example, if you select the Employee dataform, the data is mapped to fields in the Employee form. The system can import to dataforms associated with the primary dataform in tabs.
Execution Order	If the import runs automatically, in which order should the files import? It is important to set this appropriately if you have multiple dependent imports, such as an Employee Import, which depends on the Client Import executing first.
Execution Pipeline	When the imported records are saved, which pipeline will execute? This determines which rules are applied when the data is saved. Selecting Import, for example, runs the business rules, triggers email templates, and triggers workflows with the Import pipeline selected.

Import Type	Options include: • **Nightly**: Imports run from uploaded files created from reporting either manually through Admin Settings or automatically from a Windows schedule on the Server. In most situations, this option is not available. For assistance, log an Extranet case. • **API**: Imports run using direct connection to an external system by a scheduled process. When **API** is selected, **API Path** is available on the Import Map Detail form (see Configuring the Import Map Detail). Currently, the only import configured in this way is the PrismHR API. For assistance, log an Extranet case. • **Scheduled Process**: Imports run from the Process Scheduled Imports scheduled process. Files in Ready for Import status of this type are automatically imported when the scheduled process kicks off.
Import Action	Options include: • **Insert**: Only insert new records. Does not update existing records. • **Update**: Only update existing records. Does not insert new records. • **Both**: Insert new records and Update existing records.
Custom Import Class	This field is only used if there is a specialized import code written by ClientSpace. Log an Extranet case if you have questions.
Execute Business Logic	When selected (enabled), any Workflows, Email Templates, Hard Errors, or Business Rules configured in the Execution Pipeline fire on save of the data into ClientSpace. Soft errors on the pipeline are ignored. Hard errors create Log Entries, and the associated record is not imported.
Description	Provide a brief description of the import. It is useful to use this area to distinguish the purpose of the import and where the data to be imported originates.
System	When selected (enabled), only a developer user can configure the

	Import Map Header and Fields. From the Import Map Header Search dashboard, when this option is enabled, Add and Delete are not available for global administrators.
Special Import	Only used for PrismHR technology custom import code.
Record Source Field	This is the field on the selected Dataform (in the General fieldset) for locating the record. Select ImportID or ID (Record Primary Key).
Record Source Column	Specify the name of the column in the import file that contains the value of the Record Type Field. The column name is used to match the ClientSpace record you want to update. This is always compared to the ImportID on the record to be updated. Cannot be identical to the Workspace Identifier.
Workspace Source Field	Specify the type of information on the Workspace Source Dataform to locate the workspace. The administrator can configure an import to select the appropriate workspace when inserting a row of data based on the following: • **ID (Record Primary Key)**: Inserts/updates the record in the workspace where the dataform of that type and RecordID matches the Workspace Source Column from the source file. • **ImportID**: Inserts/updates the record in the workspace where the dataform of that type and the ImportID matches the Workspace Source Column from the source file. • **ProjectID**: Inserts/updates the record in the workspace where the WorkspaceID matches the Workspace Source Column from the source file.
Workspace Source Column	This is the column name on the import file that matches the Workspace record in ClientSpace. Information in this field/column is compared to the Workspace Source Field of the Workspace Source Dataform. Cannot be identical to the Records to Update.
Workspace Source Dataform	This is the dataform name that has the field to which you will match the Workspace Source Column. The Workspace Source Field of this dataform is matched against the Workspace Identifier column in the imported file to select the appropriate workspace in which to put the data.

Fields	This is how you add dataform fields to your configuration. See Configuring the Import Map Detail.
Active	When Active is selected (enabled), the import is active. Inactive imports are ignored.

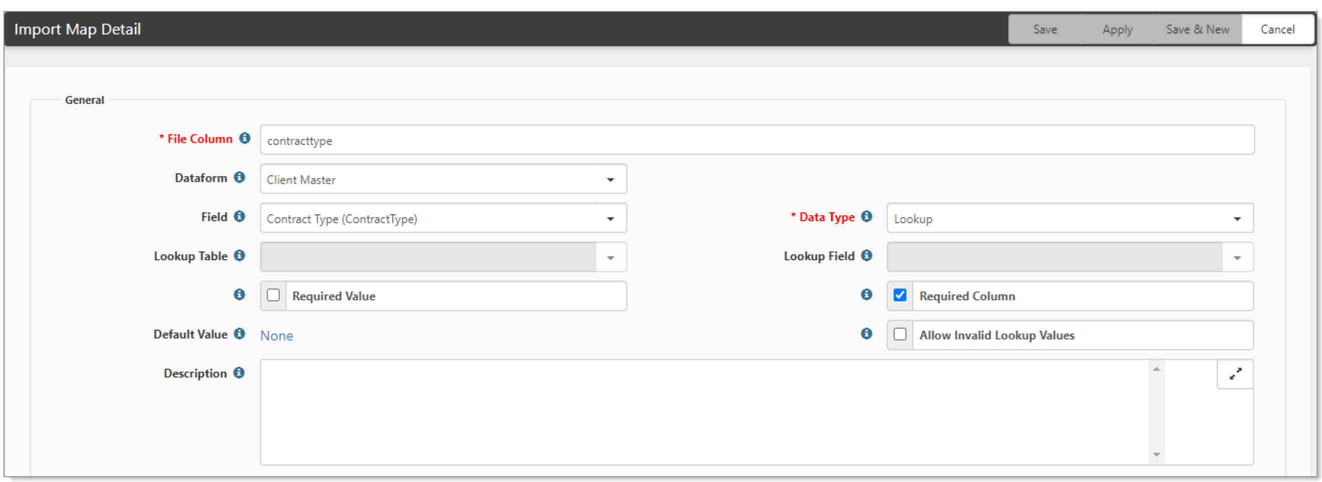
4. Click **Save**.
5. Continue to the next topic Configuring the Import Map Detail to add fields.

Configuring the Import Map Detail

After you configure the Import Map Header (to select the dataform you will insert/update), the next step is to add the fields using the Import Map Detail form. Add each field from the import file that you want to import into ClientSpace, selecting the most appropriate values that match both the data you are importing as well as the field into which you are importing the data.

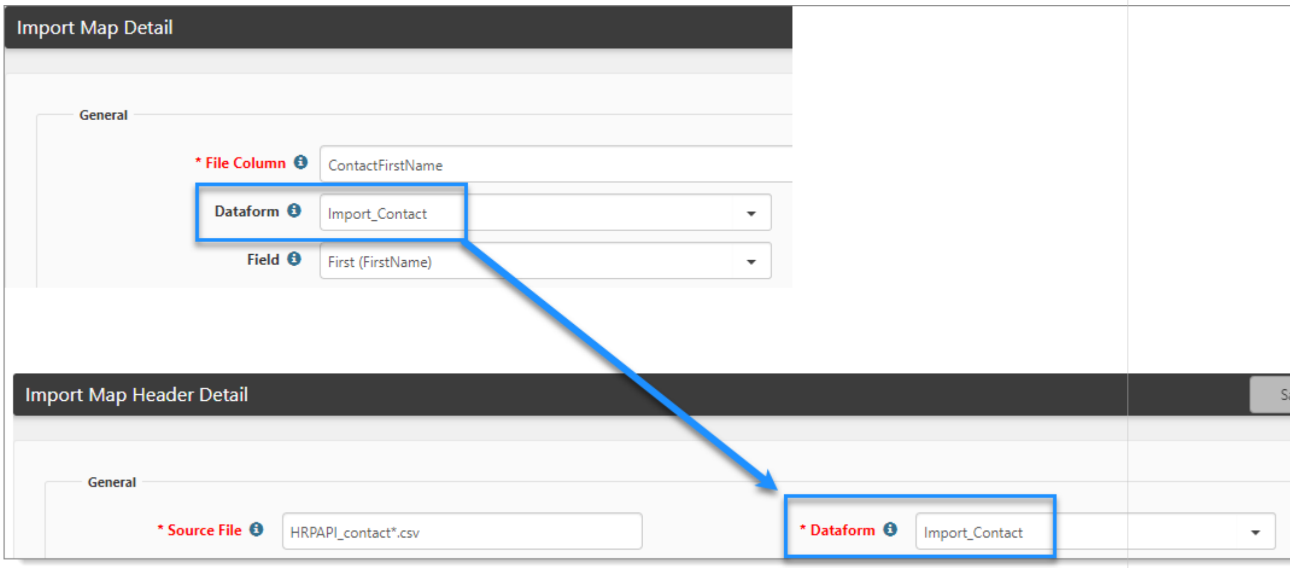
To configure the Import Map Detail:

1. From the Import Map Header form that you just added/edited (in Configuring the Import Map Header), in the right pane, click **Fields**.
   The Import Map Search dashboard opens. The list presents the fields that have been added for the Import Map Header.
2. To add fields, click **Add**.
   The Import Map Detail form opens.



3. Complete the required fields.

<table>
<tr><td>File Column</td><td>Required. This is the exact column header name from the data file you are importing. This field is case sensitive: Clientname is different from ClientName.</td></tr>
<tr><td>Dataform</td><td>Select a dataform. The system then provides a list of fields from that dataform in the Field list.</td></tr>
<tr><td>Field</td><td>Select the field you want to populate. The Dataform selected on the Import Map Detail must match either the Dataform selected on the Import Map Header Detail or the tabbed forms related to that dataform.



Tabbed dataforms always have a parent form field linked to the primary dataform selected on the Import Map Header Detail and are associated with the primary form as a tab. For information about associating tabbed forms, log an Extranet case.</td></tr>
<tr><td>Data Type</td><td>Required. Indicates the type of information you insert into the field. The following list describes the types of data that your file should contain and can include:

Checkbox: Import file should contain a One for True and a Zero for False
Date: Properly mm/dd/yyyy formatted date string (10/15/2016).
Foreign Key: Foreign Keys use the provided value in the file to match the selected Table and Field in the configuration and set the foreign key stored in the field to the primary key of the selected record.
Lookup: Lookups use the provided value from the file and match that to the ImportID of the configured Lookup field to select and store the appropriate
</td></tr>
</table>

	associated Code value in the field. • **Number**: Whole number or decimal. • **Phone**: Formatted or unformatted phone number. • **Text**: Plain text value. • **Time**: Similar to date, but should contain the Time value, such as 11:15 PM, that you would like to store in the field.
Lookup Table	When the Data Type **Foreign Key** is selected, use this required field to select the table (in conjunction with Field) to match the foreign key passed from the file.
Lookup Field	When the Data Type **Foreign Key** is selected, use this required field to select the field (in conjunction with Table) to match the foreign key passed from the file.
Required Value	When selected, the datarow value must be provided in the file (no blank cells), or the default value must be entered. If neither of these is present, the system issues a validation error.
Required Column	When selected, this column must be in the header and datarow of the imported file (blank values in the datarow use the default value configured).

Default Value	You can configure this in several ways on a field-by-field basis.
	1. Click **None**.
	The Default Value Options dialog box opens.
	2. You can configure the default value field to handle blank values using the following options:
	Standard Imports
	• **None**: If the Import file column is empty, clears the dataform field.
	• **Current Value**: If the Import file column is empty, it leaves the current value in the dataform field.
	• **Special Value**:
	  ◦ If the Import file column is empty, set the value in the dataform field to the value provided (for example, "UseThisValue").
	  ◦ If there is a problem with the configured Default Value, the Current Value is the default.
	Salesforce Imports
	• **None**: If the Import file column is empty, clears the dataform field.
	• **Current Value**: If the Salesforce field value is empty or API Path is set to

<table>
<tr><td></td><td>UseDefault, it leaves the current value in the dataform field.
• Specific Value:
  • If the Salesforce field value is empty or API Path is set to UseDefault, it sets the value in the dataform field to the value provided (for example, "UseThisValue").
  • For User, Organization, or Contact fields, the provided value MUST be the PK of the form to use (no decoding is performed, the raw value is used).
Salesforce Exports
• None: If the Salesforce field value is empty OR API Path is set to UseDefault, it clears the Salesforce Object field.
• Current Value: If the Salesforce field value is empty OR API Path is set to UseDefault, it leaves the current value in the Salesforce Object field.
• Specific Value:
  • If the Salesforce field value is empty or API Path is set to UseDefault, it sets the value in the Salesforce Object field to the value provided (for example, "UseThisValue").
  • For Account, Opportunity, or Contact fields, the provided value MUST be the SalesforceID of the record to use (no decoding is performed, the raw value is used).
3. When done, click Ok.</td></tr>
<tr><td>Allow Invalid Lookup Values</td><td>This option is only available when Data Type is Lookup.
• When enabled, the Allow Invalid Lookup Values option allows column data to be imported into the field that does not match the ImportID of a valid lookup (this is normally required). For Lookup (core) and Lookup - Typeahead datatypes, the invalid data is imported and displayed in the field. For multi-lookups, the data is imported into the field but does not display. Enabling this option allows these invalid values and logs the failed validation.
• When cleared, failed validations are logged and not imported.
See Managing import data.</td></tr>
<tr><td>API Path</td><td>Specifies the mapping path used to connect to a third-party API. This field is used only for imports configured to access directly from a third-party system API. This field is available when Import Type is set to API on the Import Map Header Detail form.</td></tr>
<tr><td>Descripti</td><td>A short description of the imported data being imported, such as the data source.</td></tr>
</table>

on	For example, "Payroll System, Client Address 1 field."
Active	When selected, this field is actively included in the import and subject to associated validation. Inactive rows are ignored on import.

4. To add multiple records, click **Save & New**. Else, click **Save**.
5. Continue adding fields, until you have included each field in the import file you would like to insert into ClientSpace.

Activating Import Map Headers

Some of the ClientSpace Import Map Headers are scripted as inactive. Therefore, to use them, you must activate the Import Map Header record.

To activate:

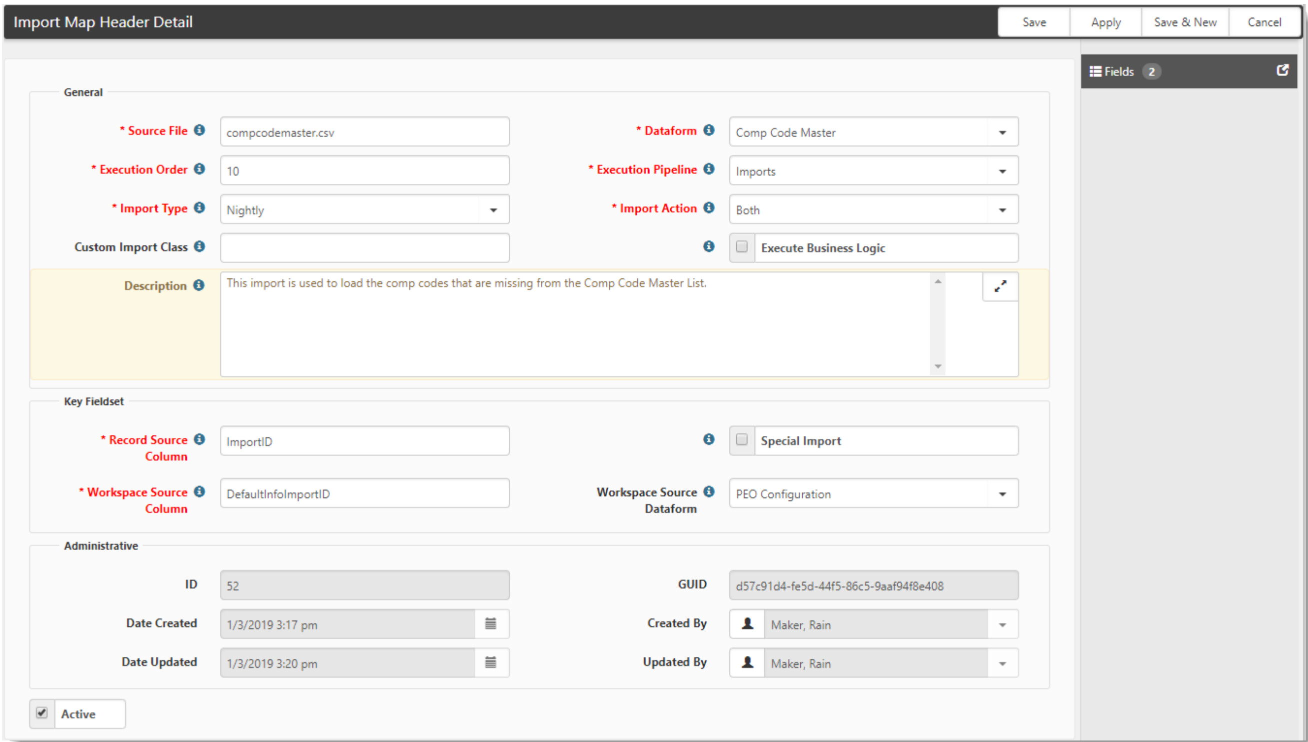
1. Go to **System Admin** > **Advanced** > **Configure Import**.
   The Import Map Header Search dashboard opens.
2. In **More Search**, select **All** and click **Search**.
   All records display to include Active and Inactive.
3. Locate the record and click (Jump).
   The record opens.
4. Select **Active** to activate the record.
5. Click **Save**.

Importing the Comp Code Master records

Often during the initial setup of ClientSpace, you will need to import Comp Code master records, the individual Code, and title description pairs. This document describes how to automate that process using an import.

To automate the import process:

1. Go to **System Admin** > **Advanced** > **Configure Import**.
   The Import Map Header Search dashboard opens.
2. Open the comp code master entry.
   The Import Map Header Detail form opens.



3. Click **Fields**.
   The Import Map Search list displays, showing the fields.

4. To configure the two text data types, select an entry and click **Edit**.

Import Mapping Report

IMPORTANT NOTES: Your import must conform to the following standards:

- Comma-delimited files must have all values surrounded by quotation marks.
- Data cannot contain crlfs (char(10) and char(13)).
- File names, column headers, and column order must match the values contained in this report exactly.
- The first row of the file must contain the column headers described in this report.

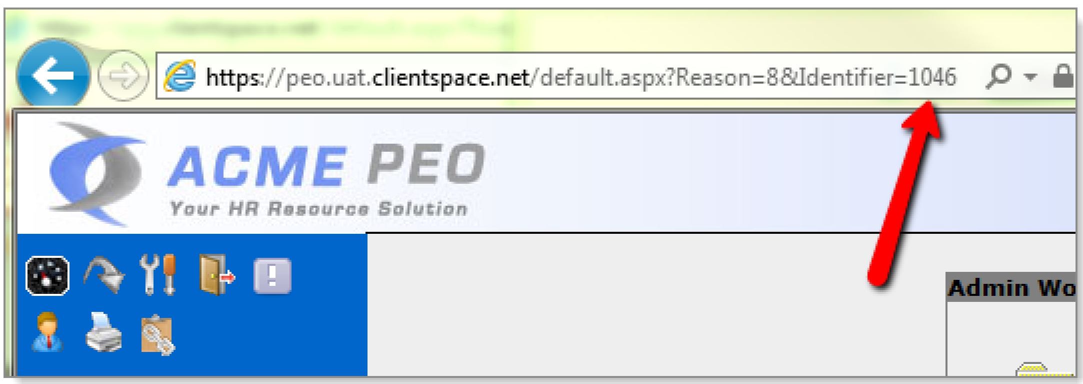
- The column headers must also be surrounded by quotation marks.
- This import is used to load the comp codes that are missing from the Comp Code Master List.

Required	Column	Data Type
XXX	Code	Text
XXX	DefaultInfoImportID	
XXX	ImportID	
	Title	Text

Example Import file

```
"ImportID","DefaultInfoImportID","Code","Title"
"2150","1046","8810","Clerical"
"2576","1046","8742","Outside Salesperson"
```

DefaultInfoImportID = Identifier in the Admin Workspace URL = 1046



Be sure to set the ImportID field on the Default Info dataform to 1046.

Common import errors

Application Scope: CORE

Problem

Nightly data import has failed, generating an error log.

Cause

Multiple possible issues - error describes the problem.

Solution

Errors can occur from a discrepancy between the Payroll system you are importing from and the state of the data in ClientSpace. Some of the most common errors are as follows.

Company / Client Import

Error on data row ###: ClientSpace.PEO.Import.ClientMaster.GetOtherData(): Data cannot be imported for Client Number #### because the status in the import file status (Client) is different than the status in ClientSpace (Terminated).

- Most commonly occurs when the Client record is terminated in the Payroll system prior to being terminated in ClientSpace. A best practice is to begin the termination process in ClientSpace to utilize the workflow within the application.

Error on data row ###: ClientSpace.PEO.Import.ClientMaster.GetOtherData(): No record found for ClientNumber ####.

- After the initial Company import, the process merely updates records and will not insert new records. This error means a Client Number exists in the payroll system that does not exist in ClientSpace. Set up a stub Org/Workspace record for this Client Number and the next import will synch up the data.

Error on data row ###: ProjectID #### is associated with a workspace that does not allow imports.

- During pricing when the Contract Status changes to "Client" as part of the normal workflow, many things are updated behind the scenes by business logic. One of these is a flag on the Projects table to "AllowImport". This error occurs because the Client has been moved to Client Status in Summit/APEX but still has not been completely processed through Pricing in ClientSpace. It is recommended that you move each of these workspaces through Pricing to allow the AllowImport flag to be properly set. If due to the sheer number of records in this state this solution is not practical, log an Extranet case to see if a scripted solution can be created to place the records in a state where the import can be processed.**

> **CAUTION:** Repercussions ** There **will** be repercussions if Workspaces are not allowed to proceed through the normal pricing process. When a workspace is in "Client" Status, the system assumes that any pricing generated is a **Re-price and not an RFP**. This means that workflow and functionality associated with RFP pricing such as Underwriting Approval workflow and other pricing functionality such as comparison batches are likely affected. To discuss the downstream effects of making scripted changes, log an Extranet case before requesting such changes.

Location Import

Business Logic Errors for data row ###: - There is already a Primary location for this client

- Two Location records on the import file for the same Client Workspace are being set as the Primary location. This normally happens if the Primary flag is set on more than one record, or multiple locations share the same address as the main Client Address. Update the payroll system to correct this issue and re-run the import.

Employee/Employment Import

The value (##-#######) in the "EmployeeID" column did not produce a valid lookup for data row #. The value (##-#) in the "ClientLocationID" column did not produce a valid lookup for data row #.

- Both these errors are commonly caused by a failure in the Company Import, as the ClientNumber doesn't exist, causing a snowball effect on the downstream imports such as Contact, Location, Employee, Employment and Voucher.

The following error(s) were found in your submission: An active Employee record already exists for this Identifier.**(PrismHR API)**

- This error only occurs with employees who work in multiple client companies. The PrismHR system stores the Employee ID at the person level, so an employee can have the same Employee Identifier associated with multiple Client IDs. ClientSpace handles this by concatenating the Client Number and EmployeeID on the ImportID for the employee record - so 00395-Y14526. If this ImportID was not properly set for some reason the system will be unable to find a unique match and will throw this error.

Unable to include Queue Record in Import file, Employee 'R40816-000386' cannot be located in HRP /PrismHR (HRP error - Employee import PrismHR error - Employment import) **(PrismHR API)**

- This error commonly occurs due to bad data in the PrismHR system - often the data does not appear bad, but when viewed by PrismHR directly in the database there are bad values stored in one of the fields - this most often occurs with date fields or specialty fields such as SSN. Contact PrismHR and create a support case. Make sure to include the record information such as Client ID and employee ID when logging your case with PrismHR.

Errors common to all imports

The value (####) in the "ClientNumb" column did not produce a valid lookup for data row ###.

- This error means a Client Number exists in the payroll system that does not exist in ClientSpace. Set up a stub Org/Workspace record for this Client Number and the next import will synch up the data.

Error on data row #: Row #: ProjectID #### is associated with a workspace that does not allow imports.

- 'AllowImport' flag is set to 'No'. By default, after workspace creation the 'AllowImport' flag is set to 'No' until the Workspace achieves 'Client' status at which time it flips to 'Yes'. The Client exists in the payroll system, but the Client Workspace is not yet a Client. Update the Client workspace to 'Client' status and re-run the import to synch up the data.

ERROR: Row column count is not equal to the expected count for data row ####

- The report that produces the import file is not properly quote wrapping empty values, resulting in less columns in the data row than are expected from the header column count. Fix the report to properly quote warp and comma separate the NULL data.

ERROR: Object reference not set to an instance of an object. For any other questions regarding Import configuration and errors, log an Extranet case.

- One of the key data values used to match the record in ClientSpace such as ImportID does not match the expected value - the system found a workspace, but not the ImportID that your file has associated hence the invalid object reference. Fix the report to properly match the key data value to the expected value.

- Rows Skipped - Dataform Insert or Update not Allowed: ####

- The number or rows (####) were skipped because they did not meet the Insert/Update/Both criteria - for example you have 2000 records in the file, but 1800 of them exist in ClientSpace and the import is configured as Insert Only - the error message would read - Rows Skipped - Dataform Insert or Update not Allowed: 1800

Note: ** There is a known issue with the Error logging on Contact Imports. This error log reports '0 Records updated' even though updates are occurring. Records with errors are reported correctly in this log. This issue is scheduled to be fixed in an upcoming sprint. Until this time, you should spot-check the Contact records after import to ensure records that do not show as having import errors are being updated correctly.

Importing ClientSpace report packages in Informer

Packages offer a method of easily transporting data (reports, mappings, security settings, etc.) from one Informer instance to another.

For our clients who would like to import data into ClientSpace, PrismHR offers a standard set of reports for the basic sets of data to include:

- Company
- Contact
- Locations
- Employee

- Employment
- Employee Payroll Vouchers

We also have several specialized reports should clients want to create Custom ClientSpace dataforms for:

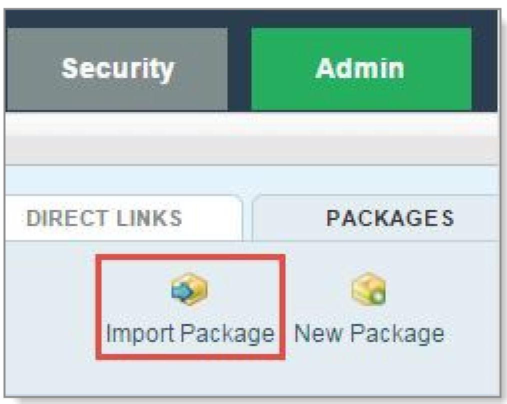
- Payroll Groups
- Payroll Schedules

If provided an account with sufficient rights, PrismHR can import these report packages for you. Should you wish to import the packages yourself however, the following guide is designed to provide step by step instructions about the package import process.

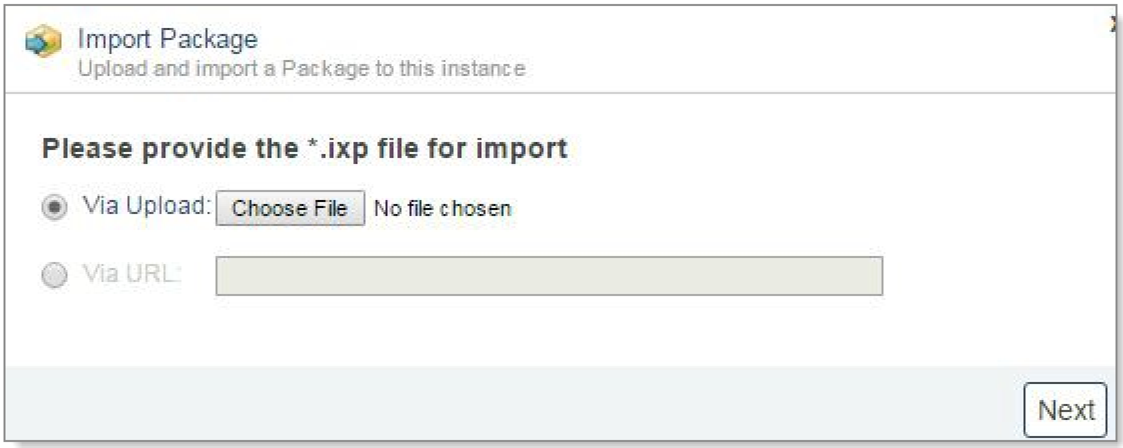
To import report packages:

When a package is exported to your hard drive, you can then import it into another instance of Informer.

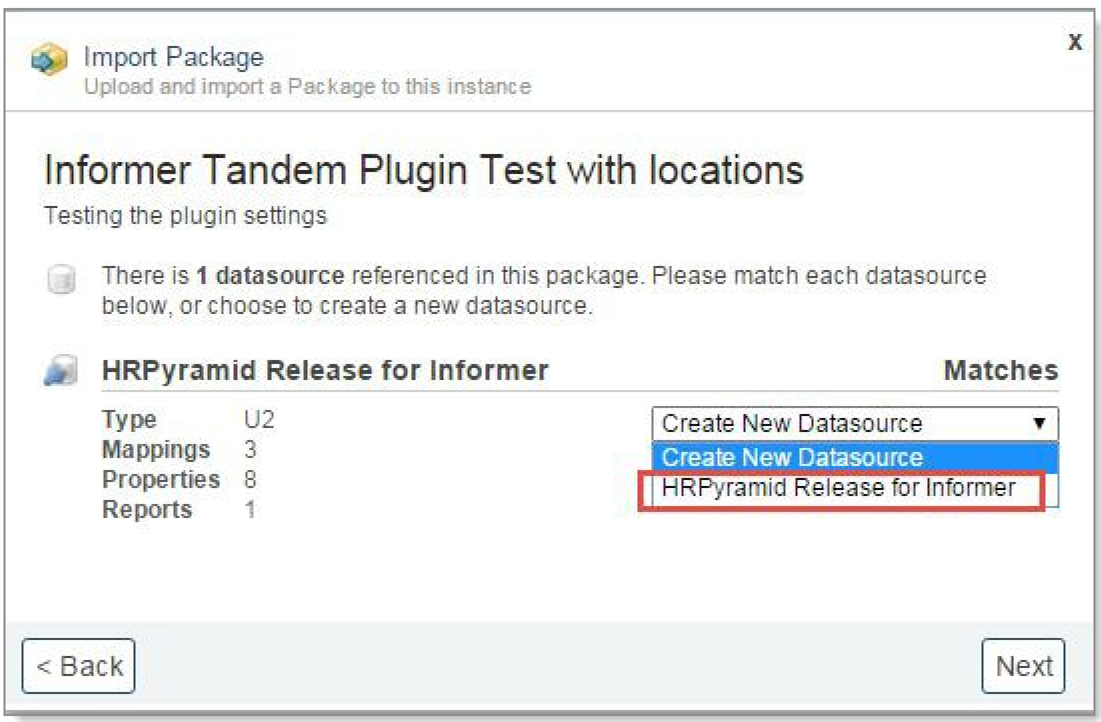
1. Open the targeted Instance.
2. Go to **Admin** > **Packages**.
3. Click **Import Package**.



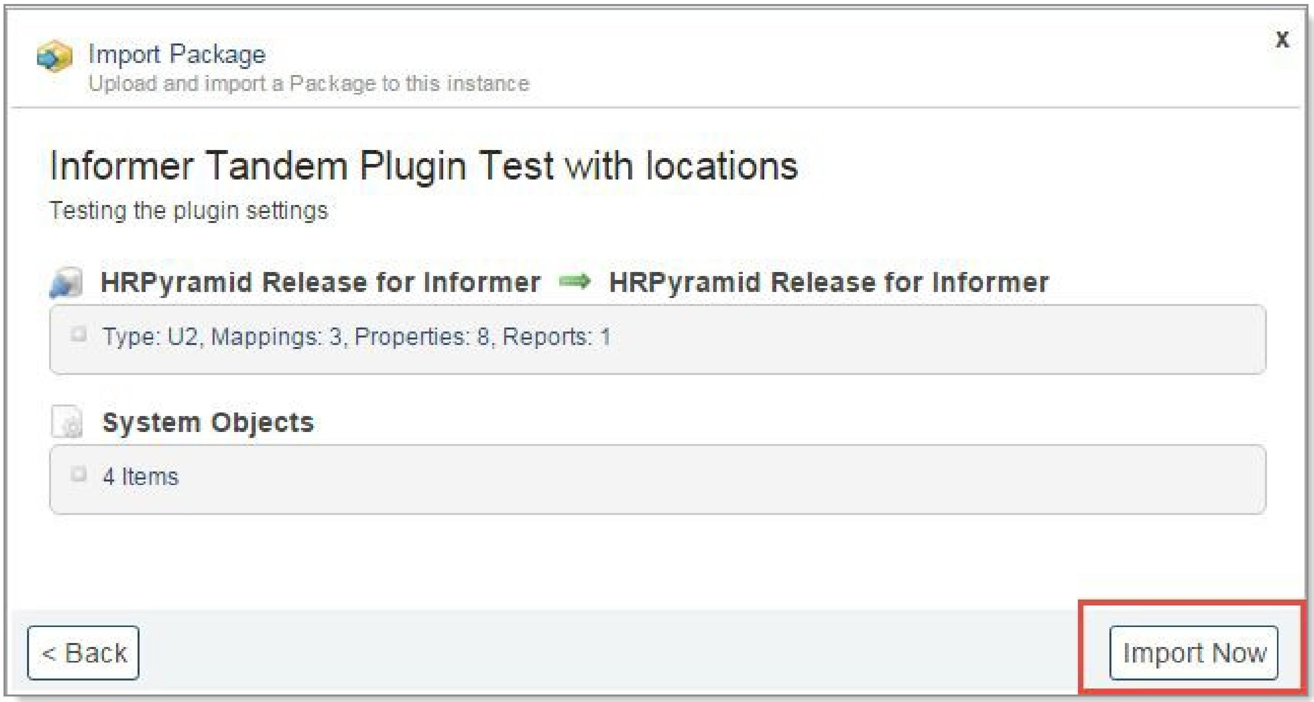
The Import Package dialog box opens.



4. Select either the downloaded file or enter the URL.
5. Click **Next**.
6. Go to **Documents** > **Informer** > **NewPluginTestReports**.



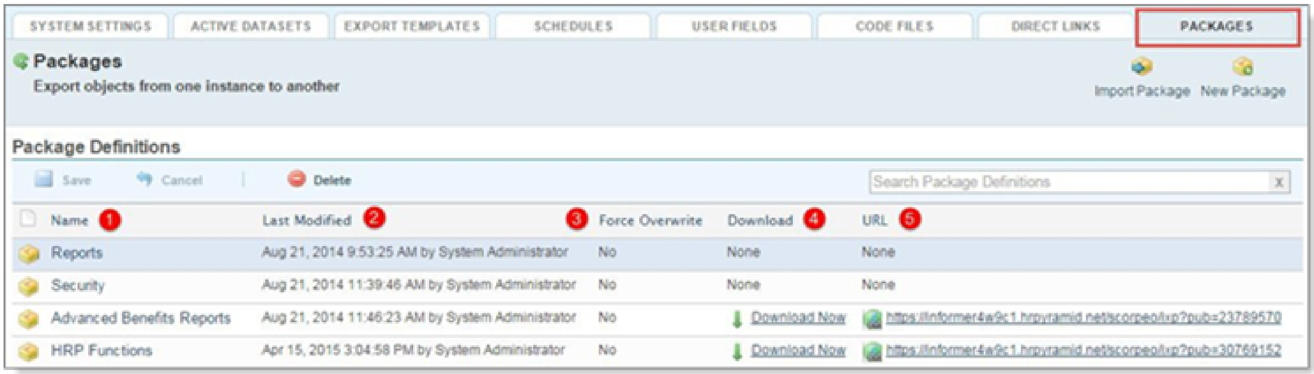
7. Select the appropriate data source. Do **NOT** select Create New Datasource.
8. Click **Import Now**.



9. You can also import from the Reports Home page.

Importing report packages in Informer

Informer is a web-based reporting utility that provides quick and easy access to data stored in multivalued or SQL-based databases. Packages offer a method of easily transporting data (reports, mappings, security settings) from one Informer instance to another.

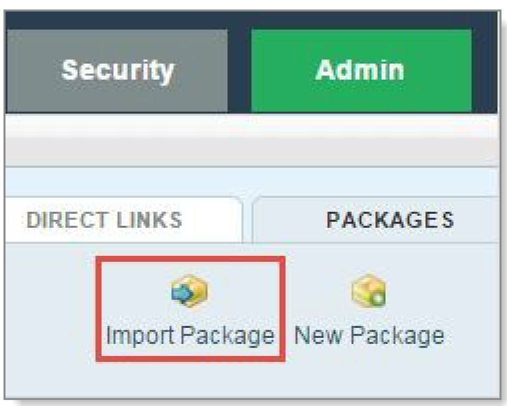


1. **Name**: Name of the package to easily identify contents.
2. **Last Modified**: Last time package contents were changed.
3. **Force Overwrite**: Shows whether a user must accept changes in the package.
4. The download link puts the package on a drive where it can be imported from.
5. Alternatively, you can create a link that you can mail or use that will download the package.

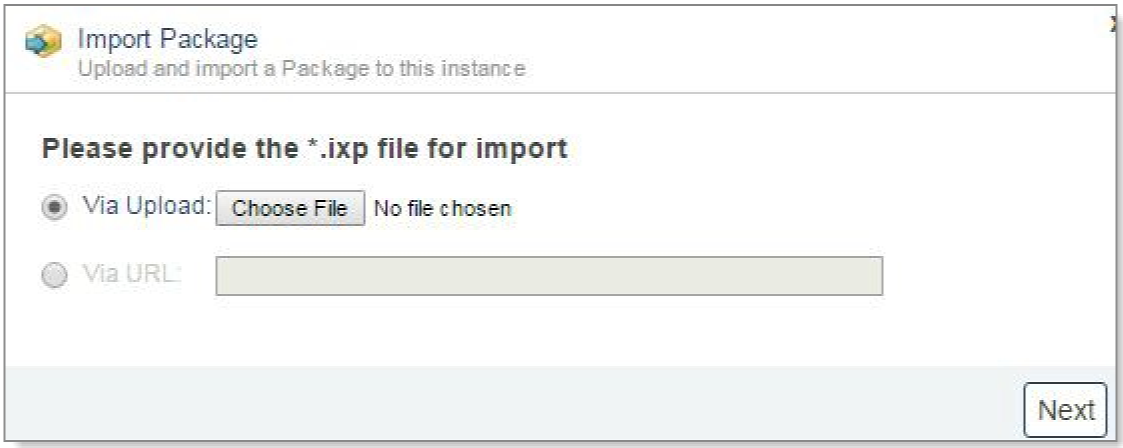
After a package is exported to your hard drive, you can then import it into another instance of Informer.

To import a package:

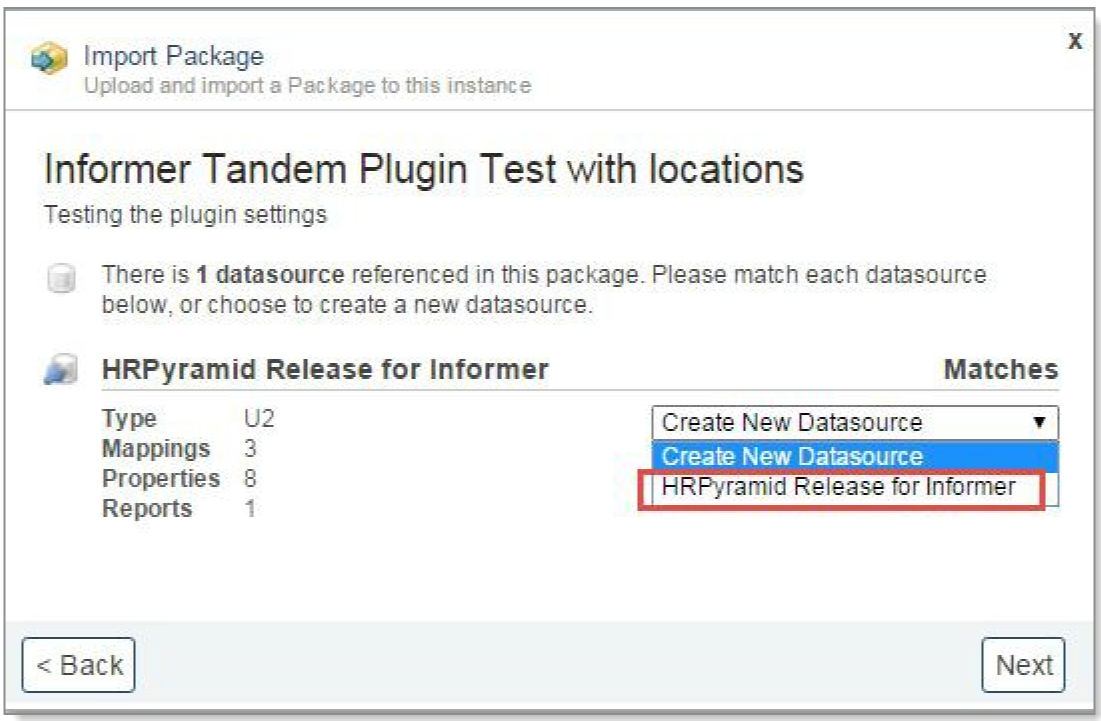
1. Open the targeted Instance.
2. Go to **Admin** > **Packages**.
3. Click **Import Package**.



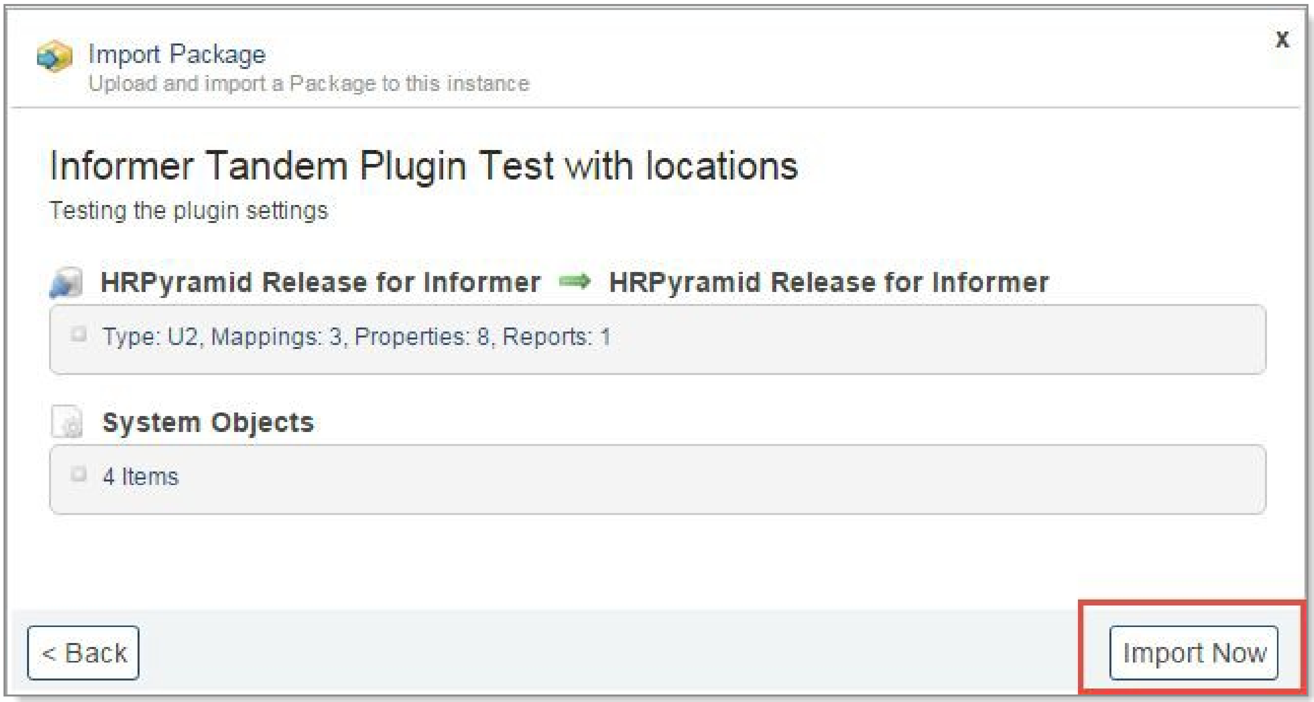
The Import Package dialog box opens.



4. Select either the downloaded file or enter the URL.
5. Click **Next**.
6. Navigate to **Documents** > **Informer** > **NewPluginTestReports**.

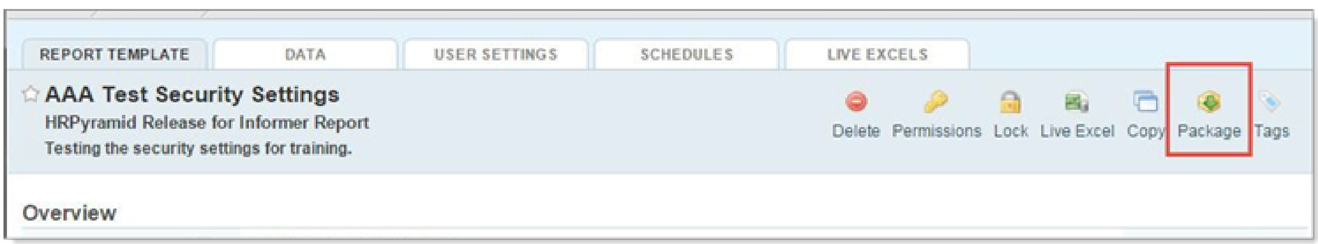


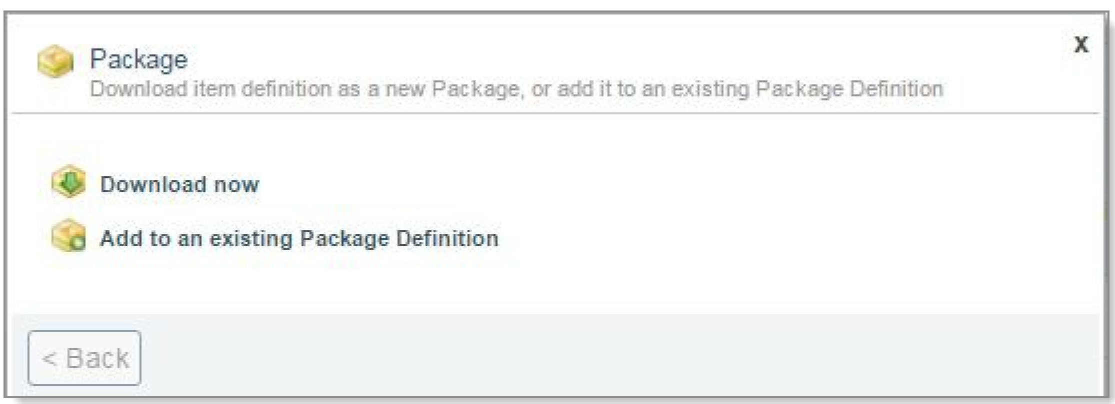
7. Select the appropriate data source. Do **NOT** select Create New Datasource.
8. Click **Import Now**.



To export individual reports:

1. To export individual reports, you can use the **Package** link in the Report template.





2. As well as import from the Reports Home page.

External source linking

The External Source Linking table is used by the Salesforce API to link records in ClientSpace and Salesforce. The Import (IMPORT_externalsourcelinking_*.csv) allows you to update existing records in the External Source Linking table from the field Record Identifier. This field maps to the RowGUID field (unique identifier) of the external source linking record to ensure the import updates the correct row.

The API system has a supporting import that imports External Source Linking records into **tblExternalSourceLinking**. This imports new and existing records. The primary purpose of this import is to seed the external source linking record in preparation for implementing an integration, such as Salesforce.

This import is based on the following configurations:

- Uses the PEO staging form **gen_ImportExternalSourceLinking**
- Rule **CreateExternalSourceLink** must be configured on form **gen_ImportExternalSourceLinking**
- No soft or hard errors are available during the import process

Using the dashboard

From the External Source Linking dashboard, you can manage the data contained in tblExternalSourceLinking. The dashboard is like a library of connections. The dashboard is accessible from System Admin > Imports > External Source Linking. It is also available from any dataform through the Action Center > More options > External Source Linking. You can perform searches, Add, Edit, and Delete records.

To access the dashboard:

1. Go to **System Admin** ⚙ > **Imports** > **External Source Linking**.
   The External Source Linking dashboard displays with a list of API records.
2. To open a record, click (**Jump**).
   The External Source Linking dialog box opens, showing the imported fields.

3. You can review, add, edit, or delete entries.
   The fields and descriptions are as follows:

API Configuration	List of library connections.
ClientSpace Table Name	The ClientSpace table name for the selected API. Auto-filled. ClientSpace Table, tblOrganization, tblContact, gen_Whatever
ClientSpaceID	This is a generated ID for ClientSpace that maps to the External ID of the connection. ClientSpace RowGUID for the ClientSpaceTableName table
External Object	Name of the external object. External Object Type, such as Account.
External Object ID	ID of the external object that maps to the ClientSpace ID.
Export Status	The status of the external integration. This field is editable only by system admins. These values are modified by a system process.
Integration Log	Information about the integration. This field is modified by a system process.

4. Click **Save**.

Accessing the dashboard from a workspace

The External Source Linking dashboard is also accessible from any dataform.

To access from a workspace:

1. Go to a workspace.
2. In the **Action Center**, in the toolbar, click (**More Options**).
   A list of links displays.
3. Select **Dataforms**.
   A list of Workspace Dataforms is displayed.
4. Select and open a dataform.
5. In the **Action Center**, in the toolbar, click (**More Options**).
   A list of links displays.
6. Select **External Source Linking**.
   You are taken to the External Source Linking dashboard.

User Imports

Users are imported into the External Source Linking table using the **IMPORT_externalsourcelinking_*.csv** import map. The ClientSpaceID value is tested against the Users table UserGUID field. If a match is found, the record is inserted into the linking table (non-matching ClientSpaceIDs cannot be inserted into this table).

The **IMPORT_user*.csv** import includes Immediate Supervisor and Default workspace. These fields are imported on both insert and update for internal users, and updates to external users (External users cannot be created from an import).

Chapter 16
Scheduled processes

Scheduled processes are executable code that runs on a schedule, such as contact syncing or polling the DocuSign system to retrieve document status. Processes are scheduled based on frequency, frequency type, and valid days. Access to the Scheduled Processes Admin dashboard is only available to system admins and users with access to the Advanced settings.

To view your scheduled processes:

1. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
2. To view the configuration, double-click the selected row or click (**Open**).

Queuing your processes

Scheduled processes are Advanced Administration functions. Global administrators can queue scheduled processes from the Scheduled Processes Admin list from the Queue Process function. When you queue a process, it sets the Next Run Date to Now and updates the Queued column to 1. If you try to queue a process that is currently running, you receive an alert to wait for the process to finish running before queuing it again. In some cases, processes inactivate after they have run. However, many processes stay active all of the time.

To queue a scheduled process:

1. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
2. To queue a process, select an entry, and click **Queue Process**.
   Queue Process sets the Next Run Date to the current date and time so that the process initiates as part of a scheduled process run, instead of running immediately.
3. To edit the frequency of a process, select the entry, and click **Edit**.
   The scheduled process form opens, ready for your edits.
4. To save your changes, click **Save**.

List of scheduled processes

The following list comprises both CORE and PEO level scheduled processes, with CORE processes marked with (CORE).

Scheduled process name	Description
ActivatePending	Find all Client workspaces with Pending Activation status that have an activation date equal to or less than today's date. Change their status to Client and their Pricing Batch Status to Activated if using pricing.
Approval Expirations	Compare the Date Approved field of the pricing batch to today's date and the Approval Expiration # of Days on the Default Info form of the Admin workspace. If the difference exceeds the default, expire the pricing batch.
Benefit Renewals	Compare the Benefits Plan expiration date to the Default Benefits Renewal Lead Time setting on Admin Workspace > Default settings. If the plan (Expiration Date - Default Lead time) is >= Now, clone any Benefit Plan template tasks with a trigger object of BenefitsRenewal.
BenefitActivations	Activates Benefits Plans and associated Offered Plans that are in Pending Activation status and Effective Date is on or before the day this process executes.
Bidirectional Contact Sync	HRPBiDirectionalContactsSync. For Initial Imports, it only retrieves ClientSpace Clients in Client, Terminated, and PendingTermination status.
BrokerOutstandingProposalsEmail	Generates and sends an email to the primary contact of Broker Orgs that have associated client workspaces with a Client Master status of Submitted with a subject line of Outstanding PEO Proposals with XXXX - XXXX being the name of the ClientSpace PEO organization.

Scheduled process name	Description
CaseTypeRowLevelSecurityUpdate	Find missing row level security settings for Client Service Cases with secured Case Types and inserts or updates as needed. Deletes row level security when case type security has been removed for a role.
ClientSpace Digest Daily (CORE)	Sends daily digest of follow-ups.
ClientSpace Digest Weekly (CORE)	Sends weekly digest.
CriticalCaseNotification	Sends Critical Case notification email with case list. Case priority must be critical – sends emails to members of Admin roles.
Delete Email (CORE)	Delete all emails and associated attached files older than 30 days from today.
Delete Marked Task (CORE)	Find all incidents marked for deletion and delete the following: Incident Users, Template Triggers, templates marked for delete, Incident Contacts, Uploaded files attached to incidents, binary files attached to incidents and finally, incidents.
Delete Orphaned Time Records (CORE)	Deletes time records that are > 1 day old and have no associated record or workspace.
DocuSign Get Docs Status (CORE)	Polls the DocuSign system using an API to find documents matching Queue records and retrieves current status of those docs. Requires a DocuSign account.
DocuSign Request Signature (CORE)	Polls the Uploaded File Queue for docs in New status then post the records to DocuSign using an API to request signatures of the addressees of those docs. Requires a DocuSign account.
Expire Passwords (CORE)	Automatically Expires user passwords based on Install Security setting and Password Change Date on the user account.
Expire Sessions (CORE)	Automatically Expires user sessions after a set amount of inactivity based on Install Security Setting.

Scheduled process name	Description
External Source Linking Cleanup	When deleting dataforms and workspaces, External Source Linking Cleanup deletes any associated external source linking records to prevent orphaned entries. A warning message is displayed when deleting dataforms and workspaces with External Source Linking records.
FileManagement Cleanup (CORE)	Interrogates the file linking table for unprocessed links, determines if they are not orphaned, removes the link if orphaned and marks the associated file for deletion. Then finds all files marked for deletion in uploaded files binary and uploaded files tables and delete them.
Generate Recurring Tasks (CORE)	Evaluates a recurrence table to identify the tasks to be generated. This only functions on non-template recurring tasks. The task that is configured to generate recurring tasks is the Primary task; those generated from this task's configuration information are Recurring tasks.
Generate Scheduled Tasks (CORE)	Find all scheduled incidents from the Incident template table and generate scheduled tasks for each based on Date offset and grace period.
Generate Scheduled Workflow	Find all scheduled workflow from the Workflow Item table and trigger scheduled workflows for each based on Date offset and grace period.
Import Cleanup (CORE)	Deletes completed import files that are marked ImportComplete and greater than 5 days old. Deletes completed import queue records that are Completed and greater than 1 day old.
Manage Non-Active Users (CORE)	Internal and External users who have not logged in during the last 30 days are hibernated. External users who have not logged in the last 180 days are expired.
Marketing Notification (CORE)	Iterate through the list of marketing campaigns that are active and have not been sent. Generate emails and CRM notes for associated marketing campaigns.

Scheduled process name	Description
Marketo Leads (CORE)	Polls the Marketo system using a configured API to synchronize Lead data. Requires a Marketo account.
Move Queued Files (CORE)	Get all files that need to be moved. Create an uploaded file object for each. Move each file and delete the binary file if successful.
Offered Benefits Plan Summary Update	Insert Offered Benefit Plan Summary records on a nightly scheduled process replicates the data grid from the header of Offered Benefits Plan dataform for cross workspace reporting purposes.
PrismHR Employee Sync With Prism	This process synchronizes ClientSpace Employees with PrismHR. It validates that Employees in ClientSpace (for Companies that have Client Numbers in PrismHR) are in PrismHR. If the Employee record is not in PrismHR, it sets the Employment status to Deleted and inactivates the Employee record. This process is scheduled to run once and then inactivates.
PrismHR Import Initial Locations	This scheduled process uses the **HRPAPI_initial_location*.csv** import configuration (must be active) to retrieve a list of Active ClientMaster records where Client Number is not empty. These Client Numbers are then matched in PrismHR and used to create a list of locations for each client. If the client number cannot be matched in PrismHR, the client is ignored. For Initial Imports, it only retrieves ClientSpace Clients in Client, Terminated, and PendingTermination status.
PrismHR Import Initial Sync	This processes the Clients to Sync and import remaining active Import Map data (employee, employment, location).
PrismHR Import Ongoing	Only imports ongoing data for Clients that exist in ClientSpace.

Scheduled process name	Description
PrismHR Import Queue Initial Clients	This scheduled process obtains a list of all clients available through the PrismHR API, creates Import records for each, and sets the Sync with PrismHR flag on the Client Master for each Client imported (company initial import map **HRPAPI_initial_company*.csv** MUST be active). The company initial import map contains the Sync with PrismHR column (scripted out as active) to allow the setting of that flag on the Client Master.
PrismHR Import OSHA Location Data	This scheduled process obtains data for the previous year and populates the dataform Location OSHA Totals. The process obtains Total Hours Worked and Average Employee Count by Location from PrismHR. This data is then available to run the OSHA 300A report. The process runs for all PrismHR clients in the status Under Contract, Client, Pending Term, and Term.

Scheduled process name	Description
PrismHR Initial Employee Sync	This scheduled process uses the **HRPAPI_initial_employee*.csv** and **HRPAPI_initial_employment*.csv** import configurations (must be active, See Activating Import Map Headers) to retrieve a list of active ClientMaster records where Client Number is not empty. The Client Numbers are then matched in PrismHR to create a list of Employee and Employment records for each client. If the Client Number cannot be matched in PrismHR, the client is ignored. The Employee and Employment records are then mapped into an import file for the *nn* number of clients, with the number of clients (*nn*) set from the InitialImportClients parameter (numeric value) of the relevant API configuration. The import files are based on the initial_employee and initial_employment import configurations. When all records for the first *nn* clients are retrieved, the import begins. This process seeds the system with any missing or new Employee and Employment records, batching these records based on the number previously retrieved until all Employee and Employment records for the designated clients are synchronized. At the end of this process, the scheduled process inactivates itself. For Initial Imports, it only retrieves ClientSpace Clients in Client, Terminated, and PendingTermination status. The process inactivates when all generated records are processed.

Scheduled process name	Description
Process Case Escalations	Checks Case Escalation records. Records with escalation date and time scheduled prior to NOW() are then processed, including (where applicable) updating priority, updating the assigned to user, and notifying the selected user or role.
Process Client Statistics	Runs once a month to create new entries and updates the Client Statistics Table. When this process runs, the procedure aggregates each of the types by month. It searches for all Employee Vouchers or UIBenefitCharges that are not yet processed, then sums the totals and creates new Client Statistics records. Each client has one record per month and type. If an unprocessed record is found for an already existing month and type, the process updates the totals on that Statistics record. When the scheduled process completes, it enables the IsProcessed option on any records that are used in creating a Client Statistics record.
Process Email Integration (CORE)	The Email Integration feature uses this process to check the designated mailbox for new entries and generate dataform records from these emails.
Process Scheduled Imports	Imports any uploaded import file whose matching map header is Import Type = Scheduled Process. The import file status must be Ready for Import or Validated.
Purge I9 Records	Check the date of all I9 records pending purge in the system against the business rules, and mark all appropriate records as purged.
Salesforce Sync	Synchronizes data between Salesforce and ClientSpace.
Seed Client Team Role	The Seed Client Team Role scheduled process deletes all Client Team Role rows before recreating Client Team Role forms.
Send Email (CORE)	Collect all unsent mail in the system, send them, and mark them as sent.

Scheduled process name	Description
ServiceCaseNotification	Checks Client Service case records for cases with escalation date and time prior to NOW(). Sends an escalation case report with the subject "Cases requiring attention" to users in escalation roles on the case type. Includes any role that has the biz_email_ ClientServiceCase_notifications entity.
Task Escalation (CORE)	Get all the incidents that have passed their due date. Sends email notifications with the Subject "Tasks requiring attention" with a list of these tasks to the associated user email accounts. Notifications are sent to the Assigned To and Owner users, users with the Send Escalation Email option enabled in their user profile, as well as anyone in the task category notification role.
TerminatePending	Find all Client workspaces with Pending Termination status that have a termination date equal to or less than today’s date. Change their status to Terminated.
Update Act-On contacts (CORE)	Polls the Act-On system using a configured API to synchronize contact data. Requires an Act-On account.
Update Client Teams	Finds Default Client Team records in Pending status and updates Client Team records for workspaces with the same Sales Region.
Update User Time Notifications (CORE)	• Find all new time tracker users and insert their records into the Notification and notification users table. • Find all users with open time records over the preset threshold and notify them: "You have not updated your time in X minutes." • Find all users without open time records and notify them: "You currently have no open time records."

Scheduled process name	Description
Upload Merge Documents	Uploads existing merge documents to the database and sets the uploaded file link GUID on the respective merge record. Only processes merge records that do not have an associated uploaded file. If a merge document does not exist in the web directory, the merge record is marked inactive.
Vouchers	HRPImportVoucher. For Initial Imports, it only retrieves ClientSpace Clients in Client, Terminated, and PendingTermination status.

Chapter 17

Merges

With a ClientSpace merge, you can merge specific data from the ClientSpace system dynamically into your business documents and forms. Merges provide options to export data from ClientSpace and present the information in a highly organized manner. This functionality removes the need for manual completion of forms, such as a Request for Proposal, or Client Service Agreement.

Common uses for merges include marketing tools, proposals, personalized letters, detailed forms, labels, data analysis, and metrics. You can merge data to generate Microsoft Word documents, Microsoft Excel files, and form-fillable PDFs.

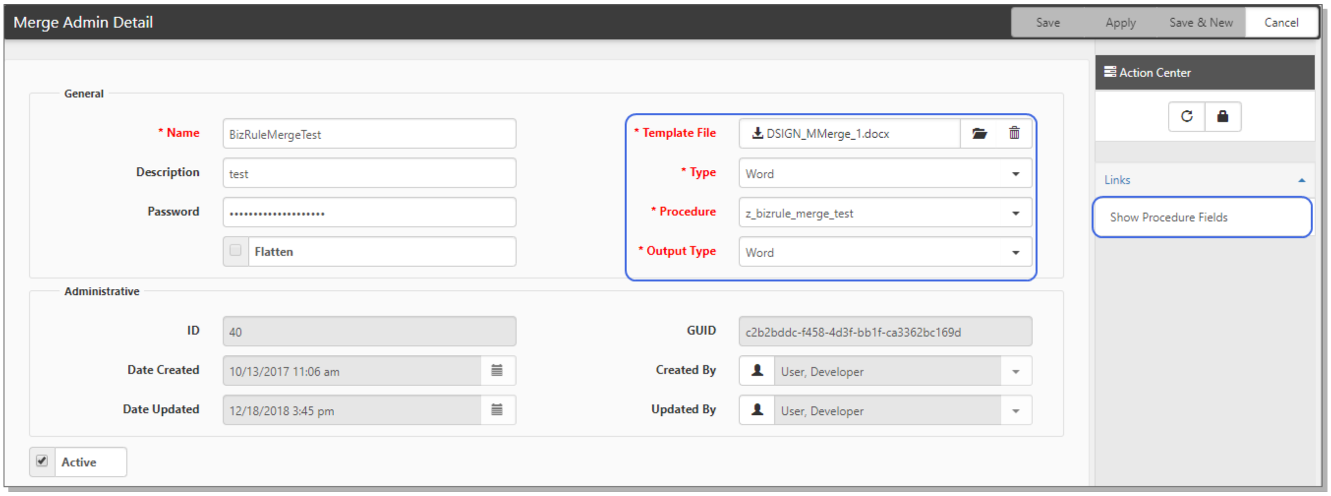
Merge Admin is where you configure the merge and maintain your documents. The Merge Admin record specifies the:

- Stored procedure that gathers the ClientSpace data.
- File template that contains the merge fields and instructions for presenting the data that is retrieved using the stored procedure.
- Type and Output Type.

Note: You cannot delete System merges. This includes *isdeveloper* users.

To access Merge Admin:

1. Go to **System Admin** > **Outputs** > **Merges**.
   The Merge Admin dashboard opens, showing a list of your existing merges. From here, you can Add, Edit (and view), or Delete a Merge record. However, you cannot delete a System merge record.



2. Complete the form fields.

Name	Type a descriptive name for this merge record.
Template File	This is where you upload the template file. 1. Click  (**Upload File**). The Upload File dialog box opens. 2. Click **Choose File**. 3. Locate the file on your computer and click **Open**. The file name displays. 4. For **Version This File?**, select one of the options: ■ **Yes, Pin New File**: Default setting. This option retains all file versions and pins the most recent uploaded file. ■ **No, Replace File**: Do not retain file versions. Replaces the current file. 5. For **Description**, type a description of the uploaded file. Optional. 6. For **Category**, select an entry from the list. Optional. 7. Click **Save**.
Description	Type a descriptive title of the merge record.
Type	Select a file type: **Word**, **Excel**, **PDF**.
Password	Optional. Type a password to secure the administration of this Merge record.

Procedure	Select a stored procedure from the list.
Output Type	This field is visible when **Type** is **Word**. For Type Word, you can generate a Word doc or a PDF.

Word Merge Proc

One of the procedures that you can select from the **Procedure** list is **peo_merge_word_companydata**. This procedure includes the following data.

Company data	Description
Related Sales Rep (fkAssignedToUserID from Org) user information	Email, Phone, Job Title, First Name, Last Name
Admin per Invoice from gen_PricingBatch	FirstCheckSupplement
WCCode1State	Full name of State
WCCode1Code	State code

Excel Merge Proc

One of the procedures that you can select from the **Procedure** list is **peo_merge_excel_companydata**. This procedure includes the following information.

Employee information	
• FirstName • LastName • CensusID • luSUTAState • CompCode • AnnualPay • MiddleInitial • luPayFrequency • Address1 • Address2 • City State • ZipCode	• County • Phone • Mobile • Email • crGender • DOB • crEmploymentStatus • JobTitle • crEmploymentType • StandardHoursPerPeriod • AnnualPayPctChange
Benefits information	
• HealthWaived • HealthPlanCode • luHealthCoverageLevel • HealthEffectiveDate • DentalWaived • DentalPlanCode • luDentalCoverageLevel • DentalEffectiveDate • VisionWaived • VisionPlanCode • luVisionCoverageLevel	• VisionEffectiveDate • VisionTerminationDate • LifeEffectiveDate • LifeTerminationDate • luDeductionType • luEnrollmentStatus • ContributionAmount • TotalContribution • WaitingPeriodDate • EstAnnualWages

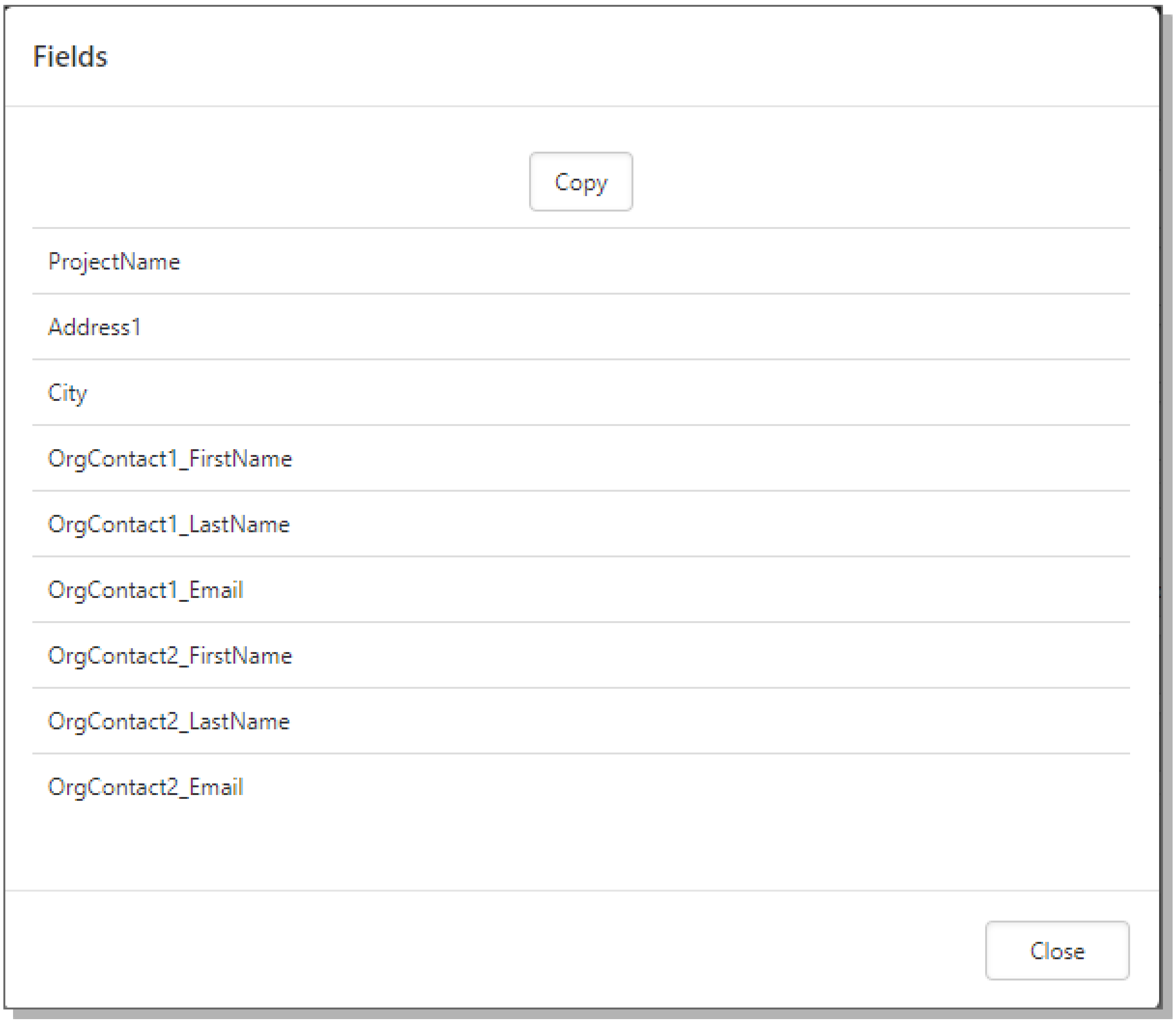
Surcharge code is also part of the pricing data.

Procedure Fields

The stored procedure (prepared SQL code that can be reused) is the mechanism for retrieving data from ClientSpace. The stored procedure generates data for the merge fields. You may need to use a custom stored procedure for your merges, or you can use one from the **Procedure** list. For any selected stored procedure in the **Procedure** list, you can view the fields. This is helpful if you are not familiar with the procedure names.

To view procedure fields:

1. From the **Merge Admin Detail** form, in the **Action Center**, click **Show Procedure Fields**.
   The Fields dialog box opens, showing the fields of the selected procedure in **Procedure**.
2. To copy the fields, click **Copy**.
   The fields are copied to the clipboard.
3. Click **Close** when done.



Microsoft Word example

The following example shows a statement of work in a Word template. Word inserts your content using variables (placeholders that are replaced by text from the data source, your ClientSpace data). In the example, the placeholder syntax is represented as <<sometext>>, such as <<CompanyName>>.

This Statement of Work is an **addendum** to the General Contract signed in, between «CompanyName» (Client) and My Company.

Contact Information:

Client Address: «CompanyName»
Address: «Address1»
«Address2»
«City», «State» «Zip»
Telephone: «BusinessPhone»
Fax: «BusinessFax»
Website: «ClientWebsite»

Client Contact Name: «Owner»
Address: «ContactAddress1»
«ContactAddress2»
«ContactCity», «ContactState» «ContactPostalCode»
Telephone: «ContactBusinessPhone»
Email: «ContactEmail»

Microsoft Excel example

You can use Excel to pull raw data and perform calculations. The following image illustrates an Excel template for payroll information.

0		**Start Date**	**End Date**		
Payroll Information		1/0/1900	1/0/1900		
	Total PB	Total WSE Paid			
Regular				Total Checks Processed	
Special				Average EE Count	
M					
Total Other					
Count of Payroll Batches					
Date Paid	**Bill Code**	**Bill Code Category**	**Bill Code Cost**	**Bill Code Amount**	

Chapter 18

Integrations

We know ClientSpace isn't the only application that you use, so we have made it easy to tie your programs together using our application integrations. This is your one stop shop for integration info.

ClientSpace integrations include:

- Email Integration
- Slack integration
- PlanHub
- **Email to Case** configures ClientSpace to sweep through an IMAP enabled mailbox to generate Client Service Cases automatically and send automated email responses.

Slack integration

The Slack integration allows you to use slash commands in Slack to retrieve a high-level synopsis of Case and Task data with links to open these cases and tasks directly from Slack. Integration with Slack requires configuring Slack as well as the ClientSpace application.

Required prerequisites

Slack integration requires that you are already using Slack in your business and that you have a Slack Administrator. Additionally, your Slack Administrator must configure the Slack Slash commands. For ClientSpace clients, after the Slack Slash Command has been created, log an Extranet case for help with configuring the Slack API.

Configuring Slack

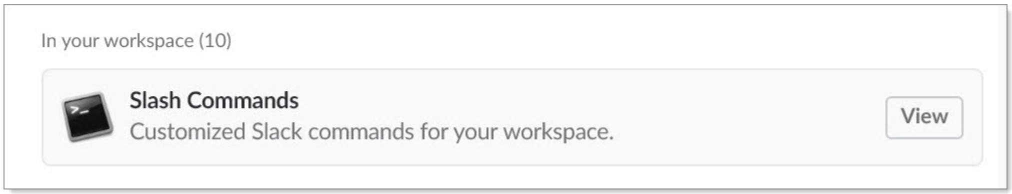
A Slack administrator will have the ability within Slack to Browse and Add new apps to the Slack install. This normally appears at the bottom of the Slack user list.

To configure Slack:

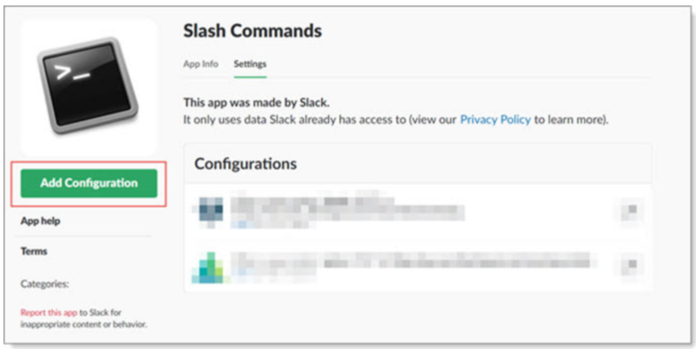
1. Open Slack.
2. Select **Apps**.

The Browse Apps page opens.

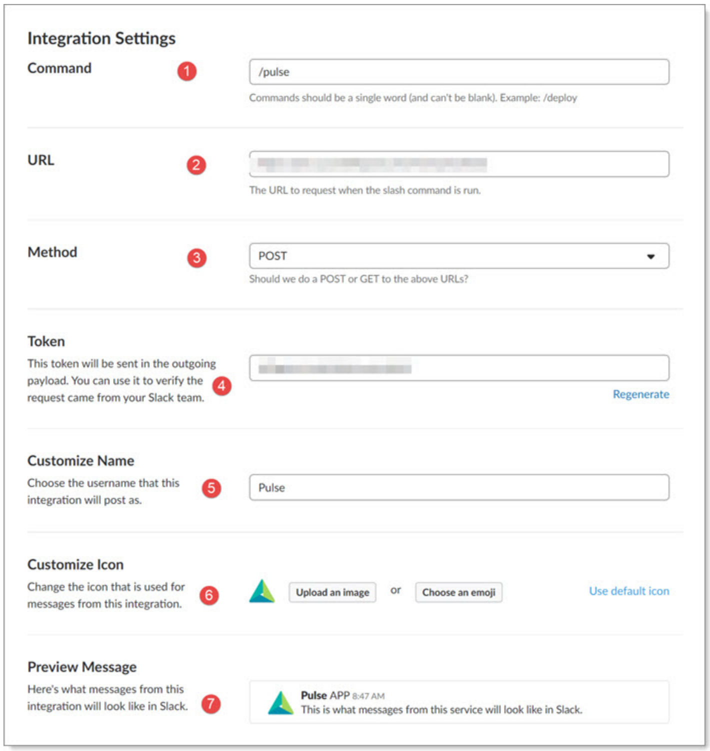
3. If not installed, install the **Slash Commands** app.



If Slash Commands is already installed, click **View** to add a new configuration.
The Slash Commands page opens.



4. Click **Add Configuration**.
5. The Integration Settings page opens.



To configure the integration settings for your installation:

1. **Command**: The precursor command you will use in Slack to begin requesting data from ClientSpace. In our example we are using **/clientspace**.
2. **URL**: The install URL of your ClientSpace installation with **/next/peo/slack** appended to the end. For example, `https://yourinstall.clientspace.net/next/peo/slack`
3. **Method**: Select **POST**. This is the request-response method when connecting the third- party application.
4. **Token**: Simply adding the configuration will cause the Slack system to generate a token. This token identifies the Slack application for third-party integrations and will be used when configuring the ClientSpace application. **Copy this token to notepad because you will use this later**.
5. **Customize Name**: The name that will identify the slash command responses. The Slack username that your ClientSpace data will come from.
6. **Customize Icon**: The icon that will appear in Slack next to the response.
7. **Preview Message**: This field will give you an advance preview of what you can expect the slack interaction to look like.
8. All other configurations should be left at their defaults.
9. Click **Save** to save your Slash Command Config.

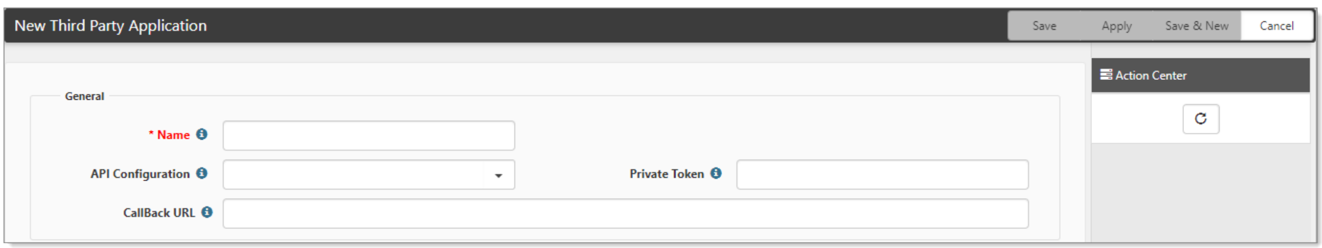
Configuring ClientSpace

The next part of the Slack configuration is to configure ClientSpace. The application configuration consists of two parts:

- The Third Party Application (TPA) configuration
- The user configuration.

To begin:

1. In ClientSpace, go to **System Admin** ⚙ > **Advanced** > **Third Party Applications**.
   The Third Party Application Configuration dashboard opens.
2. Click **Add**.
   The New Third Party Application form opens.



3. Complete the form fields:

Name	Type **Slack**.
Private Token	Paste the Token that was generated during the Slash Command configuration in Slack. This is what identifies the Slack application as a valid third-party application.

4. Click **Apply**.
   The Administration area of the form is auto-filled. Now you are ready to add users to the configuration.

To add users to your third-party application configuration:

1. In the **Action Center**, click **Users**.
   The Third Party Application Users dashboard opens.
2. Click **Add**.
   The Add Third Party User dialog box opens. This is where you add user records for each user who will connect through Slack.
3. Complete the fields:

System User	Select the ClientSpace user.
Third Party LoginID	Type the user's Slack ID.

4. Click **Save**.
   The newly added user displays in the Third Party Application Users list.

Using the Slack integration

To use the Slack integration, simply type one of the available Slash commands after typing the prefix command you assigned in Step 1 of the Slack integration settings. In our example, we are using `/clientspace`.

Note: Sharing data in a Group Channel - When returning data to a group channel using the following commands, the returned information will be visible only to you, unless you explicitly use the `-share` command. If you include `-share` in your request, the returned data will be visible to anyone in the Slack channel. Example: `/clientspace mycases -share`

The following is a list of available commands that can be used in Slack to retrieve ClientSpace information:

Command	Description and examples
case	Returns information about a Case by Case Number. Example: `/clientspace case 1234`

escalated	Returns escalated cases assigned to you, ordered by Escalation Date Descending (newest first)
	Examples:
	`/clientspace escalated`
	`/clientspace escalated -share`

help	Lists all of the available commands Example: `/clientspace help`

Command	Description and examples

mycases	Returns the most recent 10 cases assigned to you, ordered by Date Created descending (newest first)
	Examples:
	`/clientspace mycases`
	`/clientspace mycases -share`

mytasks	Returns the most recent 10 tasks assigned to you, ordered by Start Date descending (newest first)
	Examples:
	`/clientspace mytasks`
	`/clientspace mytasks -share`

task	Returns information about a specific Task by TaskID Example: `/clientspace task 1234`

Using slack requests returns a Slack post containing pertinent information about your request including a selectable link that opens the case/task in a new browser.

Chapter 19
APIs

An API is an application programming interface and specifies a software component in terms of its operations, their inputs and outputs, underlying types, and available methods. ClientSpace APIs connect one software system to another to facilitate the transfer of data between the two systems. APIs generally require additional configuration in both ClientSpace and the other software system and may have an associated cost.

Some of the ClientSpace APIs include:

- **PrismHR** is communication between ClientSpace and the PrismHR payroll system for Client and Employee data. See PrismHR API.
- **Salesforce** is two-way communication between the sales process in ClientSpace and the Salesforce API. See Salesforce .
- **Single Sign On** allows you to connect external system users to ClientSpace. It requires the user account for the user in your ClientSpace installation and can be an external user. See Implementing SSO from PrismHR to ClientSpace .
- **DocuSign** provides for electronic signature of merged ClientSpace documents. See DocuSign.
- **CCMSI** is a third-party administrator for Workers' Compensation. The CCMSI API allows you to enter data into ClientSpace and export it to CCMSI. See CCMSI.
- **Marketo** is marketing automation and lead management software. See Marketo.
- **PlanHub** integration enables you to request a Slavic 401k PlanHub proposal from within ClientSpace. See PlanHub.

If you have questions about API availability and upcoming projects, please log an Extranet case.

PrismHR API

The PrismHR API provides two-way communication between ClientSpace and the PrismHR payroll system for Client and Employee data. In addition to Client, Employee / Employment, Location, and Contact data, ClientSpace provides Employee identifying information, Payroll Batch information, and I-9 data.

Employee identifying information

ClientSpace provides data mapping through the PrismHR API to enhance the Employee related workflows. The additional mapping ensures that Employee data from PrismHR is imported into the fields on the Employee dataform, so that configured workflows trigger. These fields can be used in Conditions for Workflow Channels and Email Templates.

Fields on the Employment dataform populate through the API import process (**HRPAPI_initial_employment**, **HRPAPI_employment**, and **HRPAPI_emp_benefits**). The **HRPAPI_initial_employment** and **HRPAPI_employment** import mappings have additional columns for the following fields.

Field	Description
Enrolled Benefits?	Multi-lookup
Has Retirement?	Yes/No lookup
Has Dependents?	Yes/No lookup
Has Garnishments?	Yes/No lookup
Is FLSA Exempt?	Yes/No lookup. Imports this flag from the **Employee** > **Name** > **FLSA Exempt** field in PrismHR.
Is FICA Exempt?	Yes/No lookup. Imports this flag from the **Employee** > **Tax FICA Exempt** field in PrismHR.

These fields are displayed in the **Additional Information** fieldset.

Field replacement

All of the fields can be used in field replacement to return the value stored in the related dataform field.

- Use the Yes/No fields to configure trigger conditions by typing Yes or No in the trigger value field.

- Use Enrolled Benefits for triggering by using a trigger operator of Contains and a decoded value such as Health, Dental, and Vision.

Enrolled Benefits options

Code/ImportID - Decode: The fields have the following configured values for Enrolled Benefits options.

• MED: Medical	• ADD: Accidental Death and Dismemberment	• ACC: Accident Benefits
• VIS: Vision	• LIS: Life Insurance - Basic - Spouse Only	• LDA: Additional
• DEN: Dental	• LIC: Life Insurance - Basic - Child Only	• LTD SDA: Additional
• VOL: Voluntary Benefits	• ANC: Ancillary	• STD BLX: Basic Life Extra
• LIF: Life Insurance - Basic	• CRI: Critical Illness	• HOS: Voluntary Hospitalization
• GTL: Group Term Life	• CAN: Cancer Benefits	• IDT: Identity Theft
• LTD: Long Term Disability	• MDP: Domestic Partner Medical	• LGL: Legal
• STD: Short Term Disability	• DDP: Domestic Partner Dental	• CRL: Critical Illness as Life
• GAP: Gap Insurance	• VDP: Domestic Partner Vision	

Garnishments

Has Garnishments data is populated when:

- Initial Employment (both Client and Employee Sync processes) runs.
- An Enrolled Benefit, Dependents, or Retirement change is made in PrismHR (using the PrismHR ongoing import configurations).
- An Employment change is made.

Configuration:

- A new field was added to Employment form luHasGarnishments (lookup, Yes/No).
- A new Import Field mapping was added to the HRPAPI_employment*.csv and HRPAPI_initial_employment*.csv Import Mappings.
- Column Name MUST be HasGarnishments, mapped to luHasGarnishment field, API path Employee/Garnishments/active.
- A new Import Field mapping was added to the HRPAPI_emp_benefits*.csv import mapping.
- Column Name MUST be HasGarnishments, mapped to luHasGarnishment field, API path Benefits/Garnishments/active.

Payroll Batch information

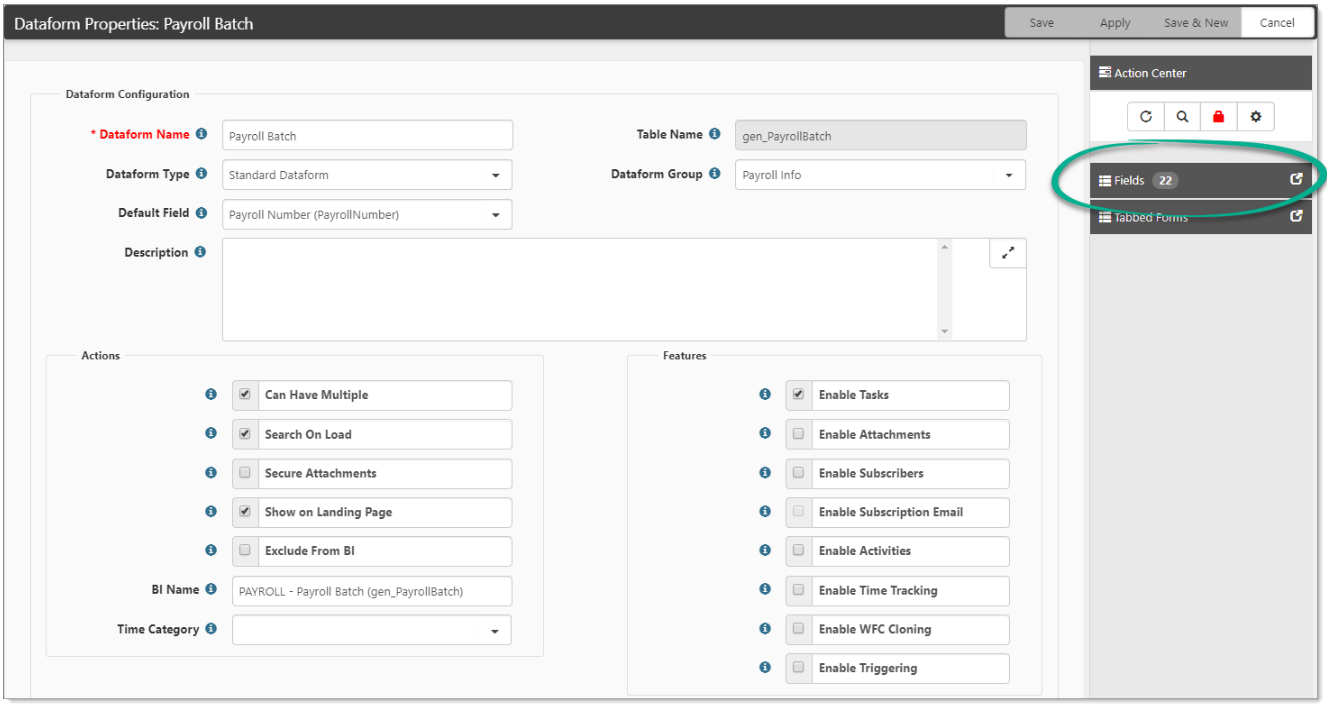
You can import payroll batch data from PrismHR into ClientSpace for reporting. The imported data resides in the following dataforms:

- Payroll Batch
- Pay Group
- Billing Voucher

The following topics provide details about the dataforms and the relationships, the PrismHR API that updates the payroll batch, and the import mappings.

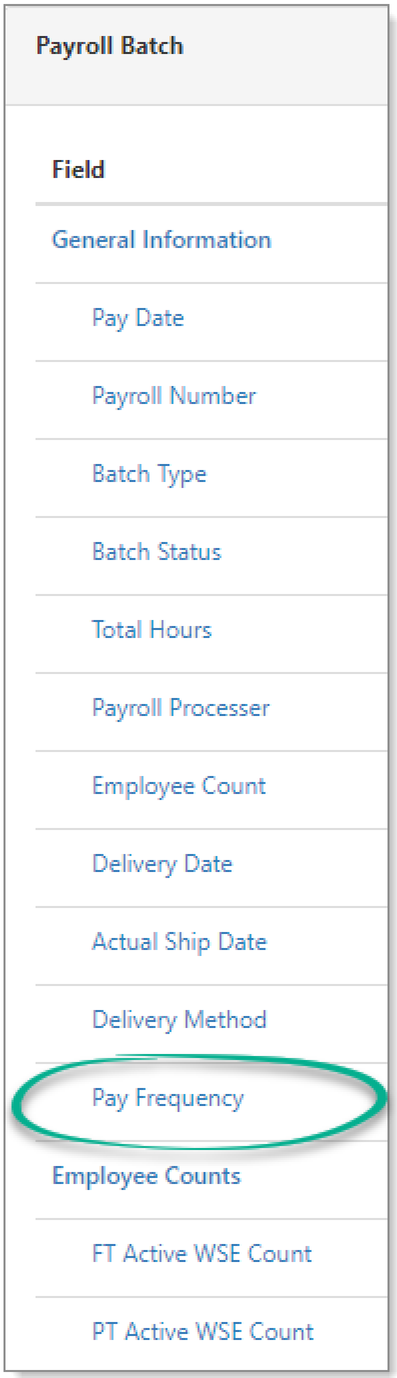
Payroll Batch Dataform

All the fields on the Payroll Batch dataform are read-only and populate through the PrismHR API Import. By default, the form is secured with View rights for all users in the PEO Employees role. The Payroll Processor field is set using a business rule that finds the Client Team form associated with the workspace and copies the Payroll Processor field information from the Client Team form into the Payroll Processor field on the Payroll Batch form. The business rule is triggered when records are inserted either through a normal dataform save or from an import. The Payroll Batch dataform is a parent to the Billing Voucher dataform.

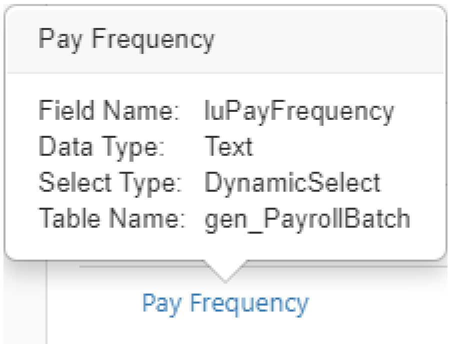


To view the Payroll Batch dataform:

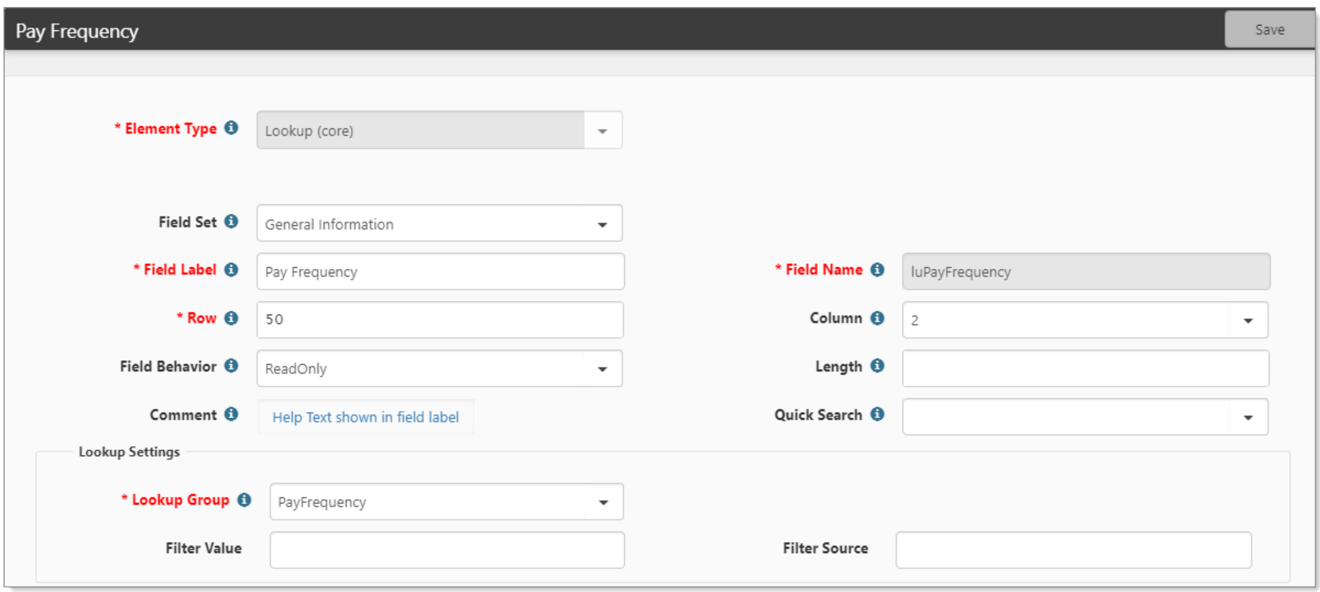
1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Select **Payroll Batch** and click (**Open**).
   The Dataform Properties: Payroll Batch form opens.
3. To view fields, in the **Action Center**, click **Fields**.
   The Payroll Batch fields list displays.



4. To view the attributes of a field, hover on a field.



5. To view the type of data stored in the field, select the field and click (**Open**).



How Payroll Batch data is updated

The PrismHR API updates the payroll batch throughout the payroll creation process. The system creates a new ClientSpace Payroll batch record as soon as the record is created in PrismHR. It then updates the batch status using a scheduled process, so if a batch is stopped at a certain point in the payroll system, notification and workflow events are triggered in ClientSpace based on the status update.

Available statuses include:

Payroll calculation results rejected by client	Payroll calculation completed with warning	Payroll printed with errors
Payroll calculation results pending	Payment pending	Time sheet entry in

client approval		progress
Payroll is complete	Payroll is ready to print	Payroll is ready for time sheet entry
Payroll finalization in progress	Payroll finalization complete with errors	Payroll is ready to calculate
Payroll calculation completed with errors	Finalization pending approval	Wire transfer pending
Payroll reports are ready for review	Payroll is ready to ship	

Payroll Batch Ongoing Imports handle failed or deleted payroll batches in PrismHR.

- Payroll Batch DELETE events are processed to create Import Queue records.
- When DELETE events are processed to generate Import file rows, they are marked Completed with the message: "Batch '#####.###' Deleted, this record will not be processed"
- If ClientSpace cannot retrieve a Payroll Batch from an event, that event (Import Queue record) is marked as Completed with a message: "Batch '#####.###' Unable to include Queue Record in Import file, no getBillingCodeTotalsForBatch response info, this event will not be processed"

Client validation

In ClientSpace, Client number validation occurs before processing the Payroll Batch Import Queue records. If the Client is not found, the queue record is completed with a note. The validation occurs for queue records created from the Payroll Batch Import process, not the Ongoing Import process. The Ongoing process checks the Client number in ClientSpace before creating the queue record.

Employee count

When regular payroll batches are processed as Completed, the employee counts are calculated from the Employee records and their status classifications: full-time active, part-time active, full-time terminated, part-time terminated, full-time leave, and part-time leave. Use the Employee count records in the ClientSpace Executive Dashboards to compare the number of active employees to the number of paid employees.

Voided batches

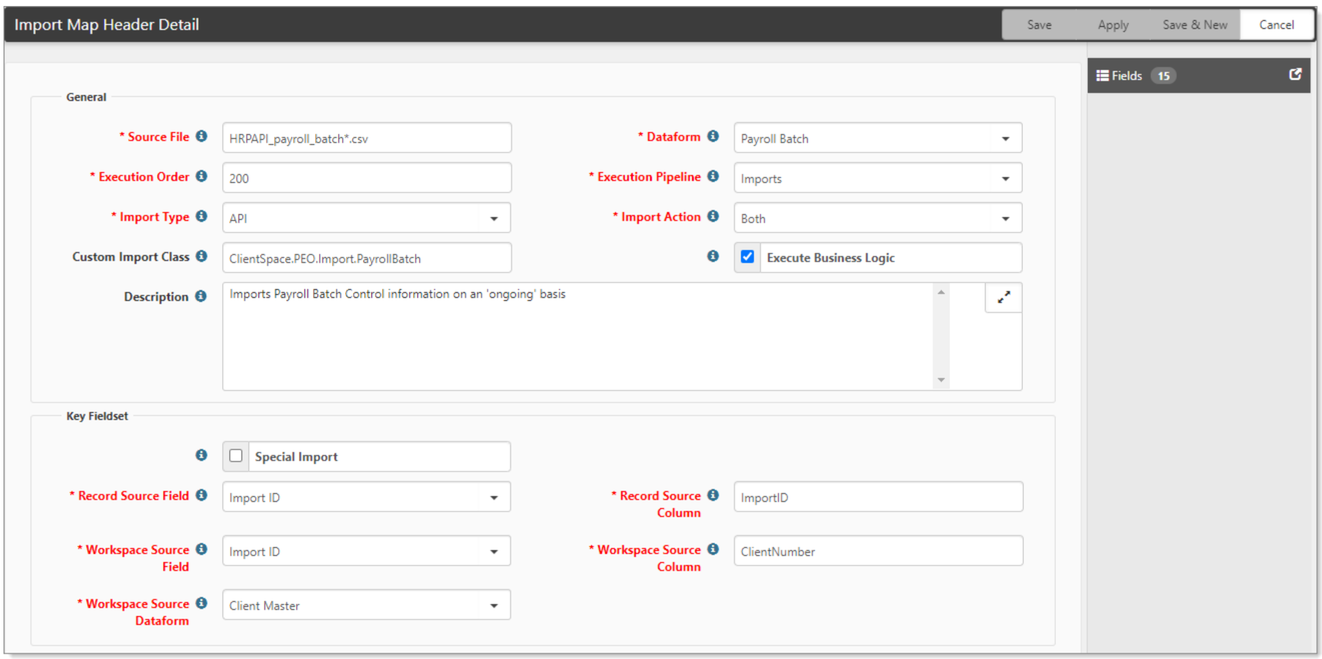
For voided batches, ClientSpace uses the list of employees to determine the pay groups that are being voided and builds that batch similar to running a scheduled payroll batch. The billing codes are then distributed across the pay groups to balance out the original payroll batch. This provides a zero-sum between the initial run batch and the batch that is voiding the first batch.

Payroll Batch Import Mappings

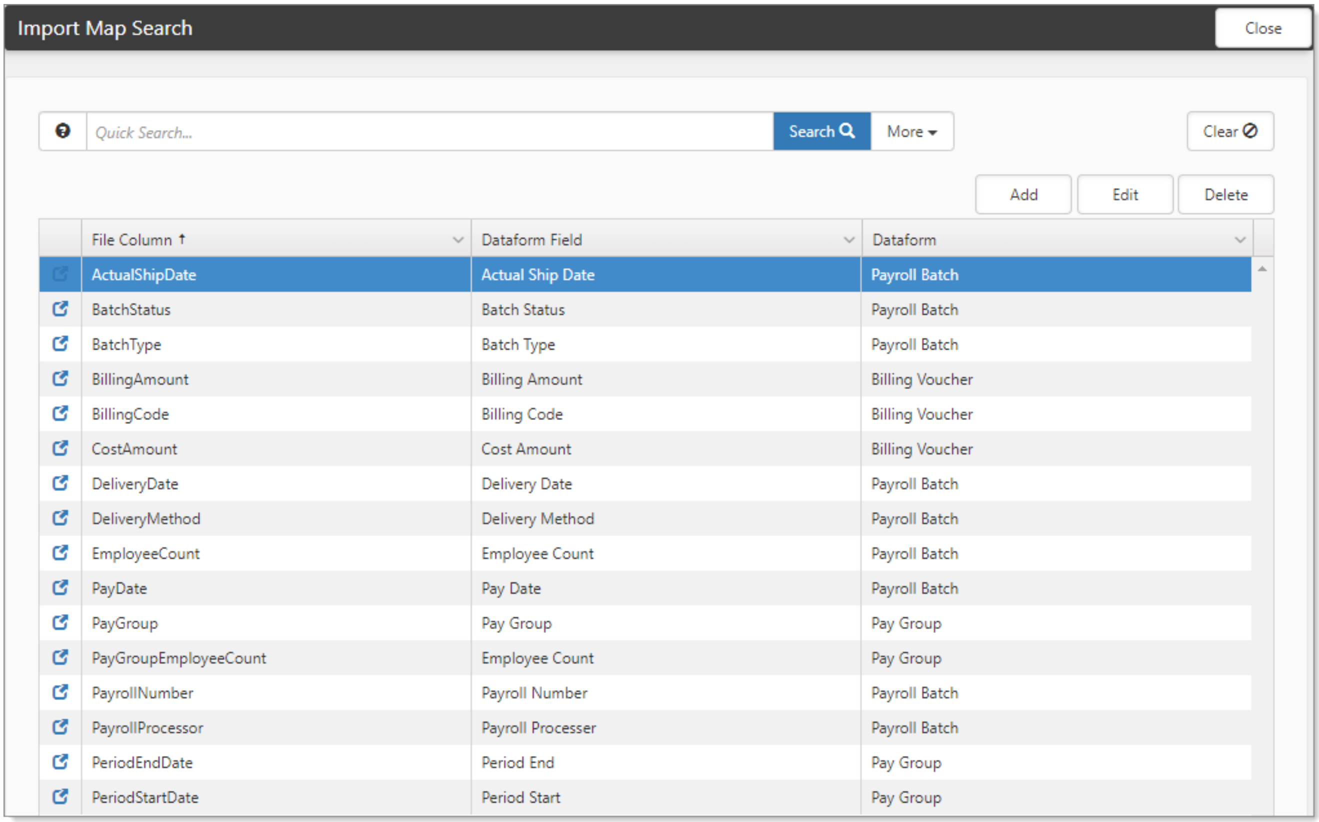
The following procedure provides details for viewing the Payroll Batch mapping.

To view the mappings:

1. Go to **System Admin** > **Advanced** > **Configure Import**.
   The Import Map Header Search dashboard opens.
2. Locate **HRPAPI_payroll_batch*.csv** and click (**Open**) to open the header detail.
   The Import Map Header Detail form opens.



3. To view the fields, click **Fields**.
   The Import Map Search list displays the Payroll Batch fields.



Available fields are ActualShipDate, BatchStatus, BatchType, BillingAmount, BillingCode, CostAmount, DeliveryDate, DeliveryMethod, EmployeeCount, PayDate, PayGroup, PayGroupEmployeeCount, PayrollNumber, PayrollProcessor, PeriodEndDate, and PeriodStartDate.

4. To view a field and its properties, select and click (**Open**).

Payroll Batch, Pay Group, and Billing Vouchers

Payroll Batch processing involves a few dataforms: Payroll Batch, Pay Group, and Billing Vouchers.

Payroll Batch – The Payroll Batch import brings in the payroll data for each batch, enabling ClientSpace to track the number of paid employees. The Payroll Batch dataform stores the payroll information for each processed batch from PrismHR and allows for tracking of the batch from the beginning of the process to the end.

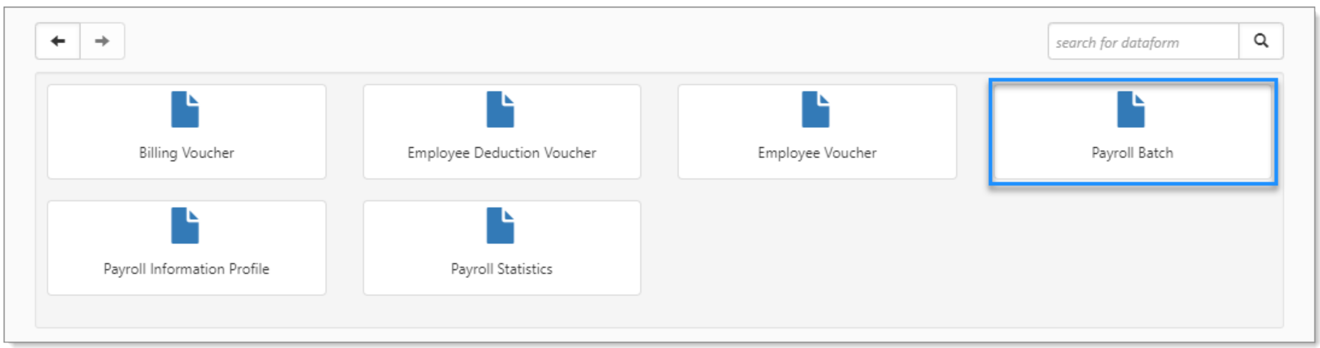
Pay Group – The Pay Group dataform stores information about each pay group type, such as Weekly and Bi-Weekly, Period Start and End Date, and Employee Count. Pay Groups allows us to track the frequency of how employees are paid and reflect the employee counts for each frequency type. The number of pay groups depend on who is being paid at the time of the payroll batch run. Pay Group names vary by client need and are imported from PrismHR. Payroll Batches with multiple pay groups will have a pay group dataform for each one associated with that batch.

Billing Vouchers – The Billing Vouchers reflect the total amount paid for the payroll batch and also includes items, such as billing codes for taxes and deductions. Billing Vouchers are viewable from the Payroll Batch.

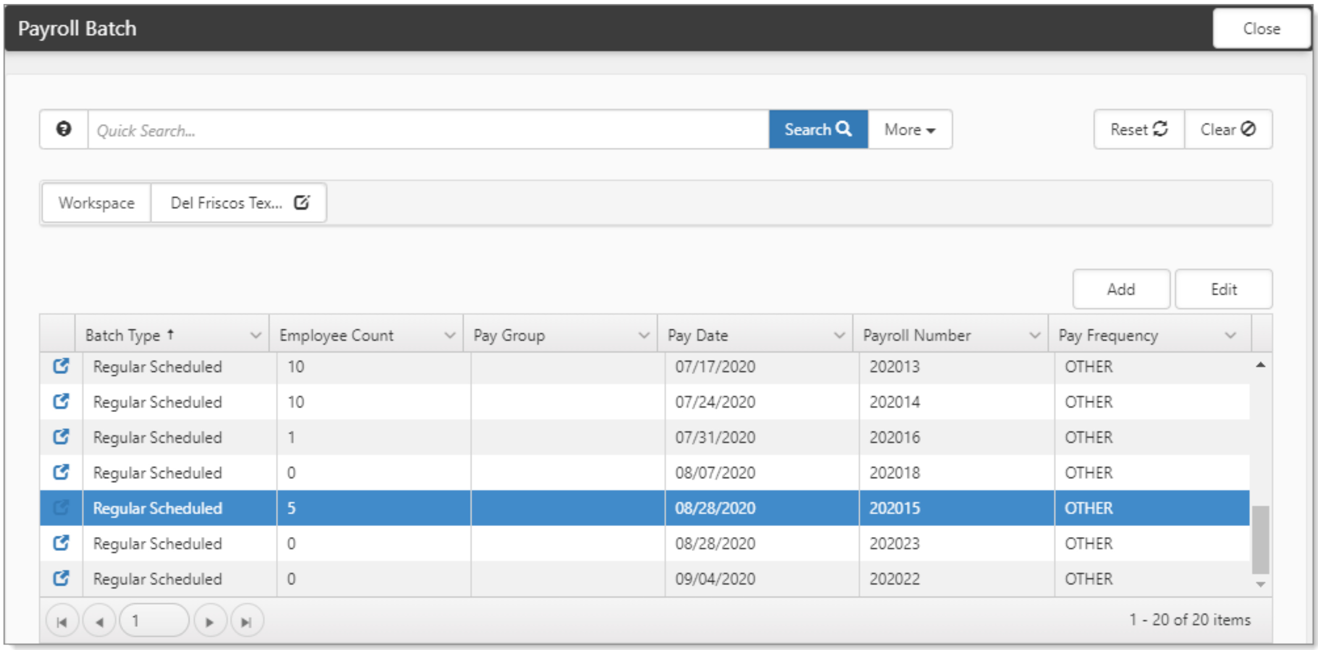
Let's look at an example of a Payroll Batch, Pay Group, and Billing Vouchers.

To view the configuration:

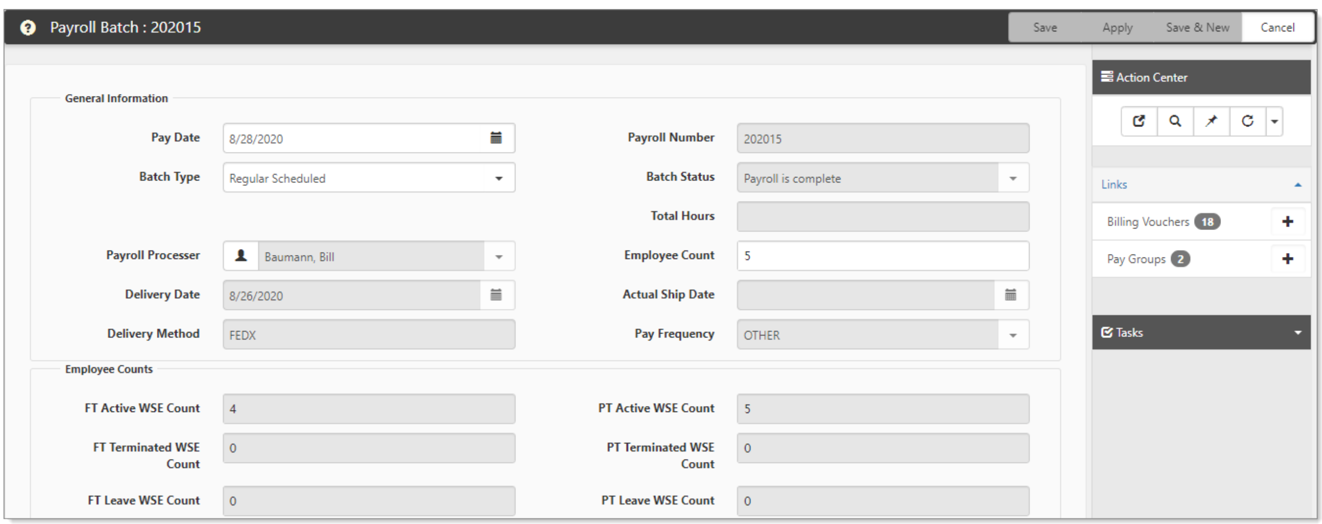
1. On the module bar, click **Workspaces**.
   The Workspace Search dashboard opens.
2. Select a workspace and click (**Jump**).
   The Workspace opens.
3. Move down the page to the dataform tiles, and click **Payroll Batch**.



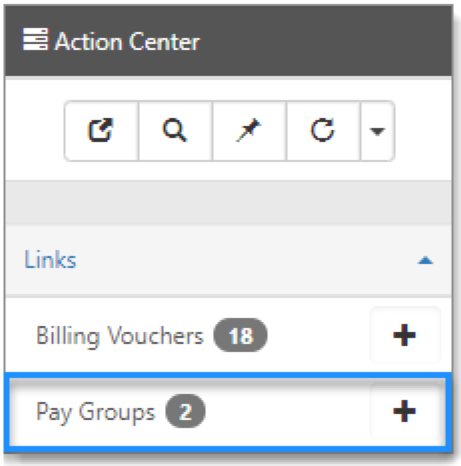
The Payroll Batch dashboard opens.



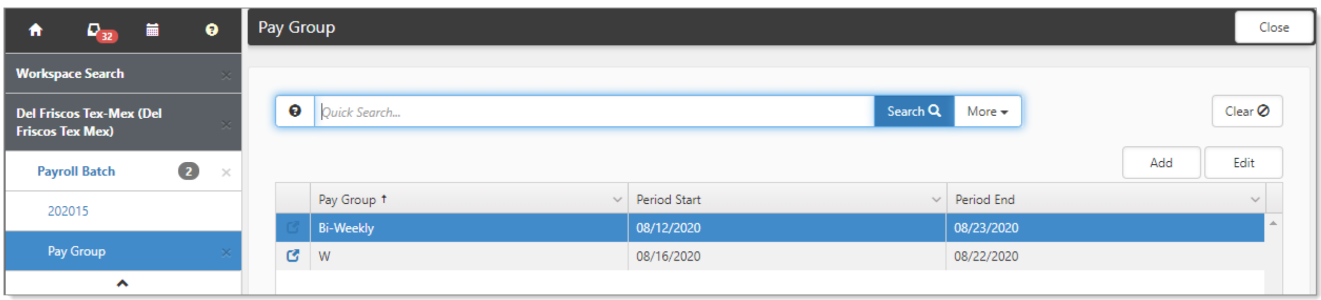
4. Open an entry.
   In our example, we selected an entry with multiple Pay Groups.



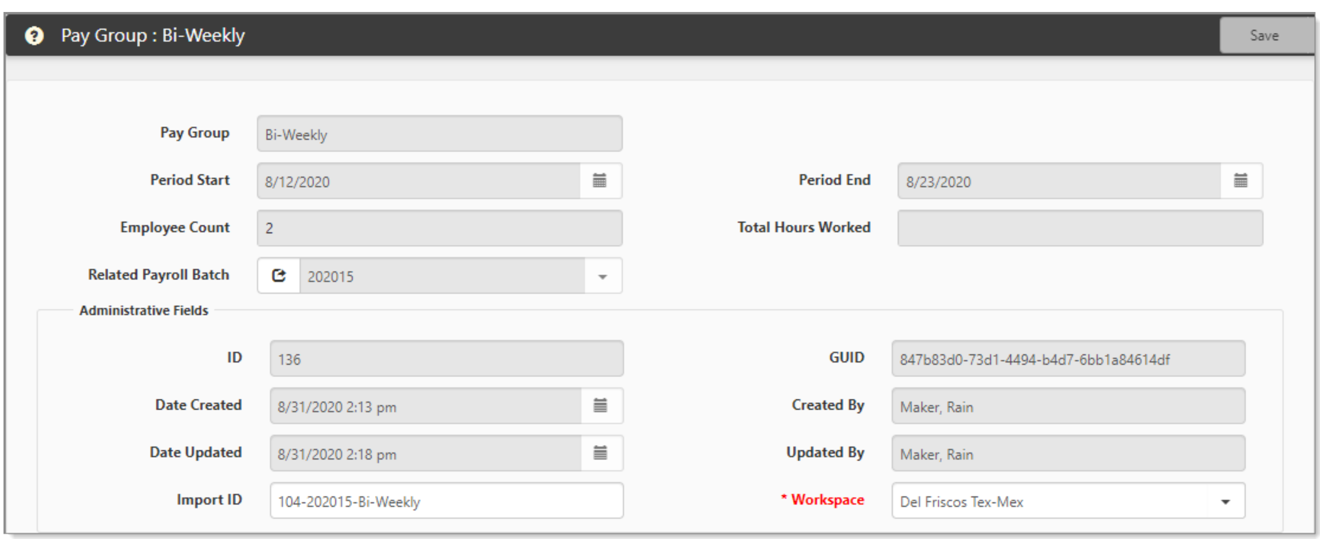
5. In the **Action Center**, click **Pay Groups**.



The Pay Group dashboard opens. Our example shows two entries: Bi-Weekly and W. These pay groups are imported from PrismHR into ClientSpace.



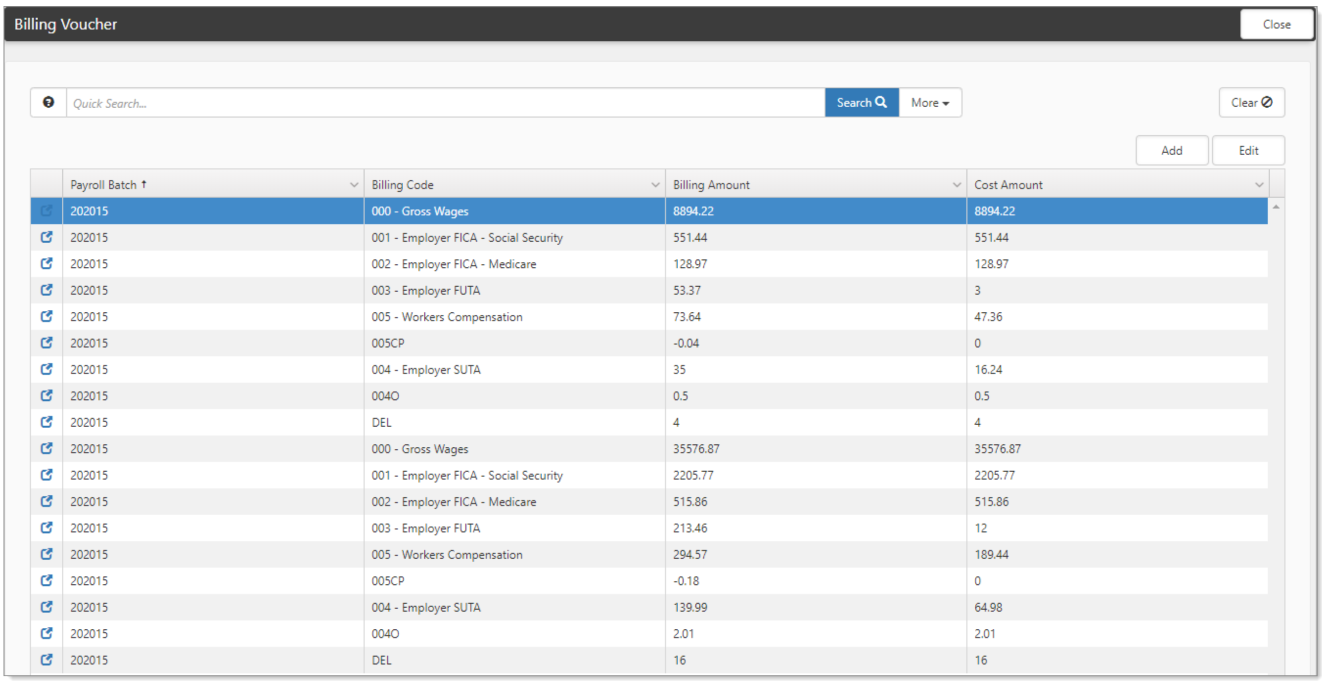
6. To view a Pay Group, highlight a row and double-click or click (**Open**).
   The Pay Group details page opens.



To view Billing Vouchers from the Payroll Batch:

1. From the **Payroll Batch** dataform, in the **Action Center**, click **Billing Vouchers**.
   The Billing Voucher dashboard opens.

   Because our example has two Pay Groups, the entries are associated with each Pay Group. When you total the like entries, for example Gross Wages, these will be the totals for the Payroll Batch. Note, the Billing Voucher reflects the individual items for each Pay Group.



Payroll Batch	Billing Code	Billing Amount	Cost Amount
202015	000 - Gross Wages	8894.22	8894.22
202015	001 - Employer FICA - Social Security	551.44	551.44
202015	002 - Employer FICA - Medicare	128.97	128.97
202015	003 - Employer FUTA	53.37	3
202015	005 - Workers Compensation	73.64	47.36
202015	005CP	-0.04	0
202015	004 - Employer SUTA	35	16.24
202015	004O	0.5	0.5
202015	DEL	4	4
202015	000 - Gross Wages	35576.87	35576.87
202015	001 - Employer FICA - Social Security	2205.77	2205.77
202015	002 - Employer FICA - Medicare	515.86	515.86
202015	003 - Employer FUTA	213.46	12
202015	005 - Workers Compensation	294.57	189.44
202015	005CP	-0.18	0
202015	004 - Employer SUTA	139.99	64.98
202015	004O	2.01	2.01
202015	DEL	16	16

Billing Voucher dataform

Billing Voucher records break out the individual line item billing code entries associated with a payroll batch. A link is available to the Payroll Batch dataform to display the associated voucher records. The Billing Voucher dataform is a child to the Payroll Batch dataform.

Billing Voucher

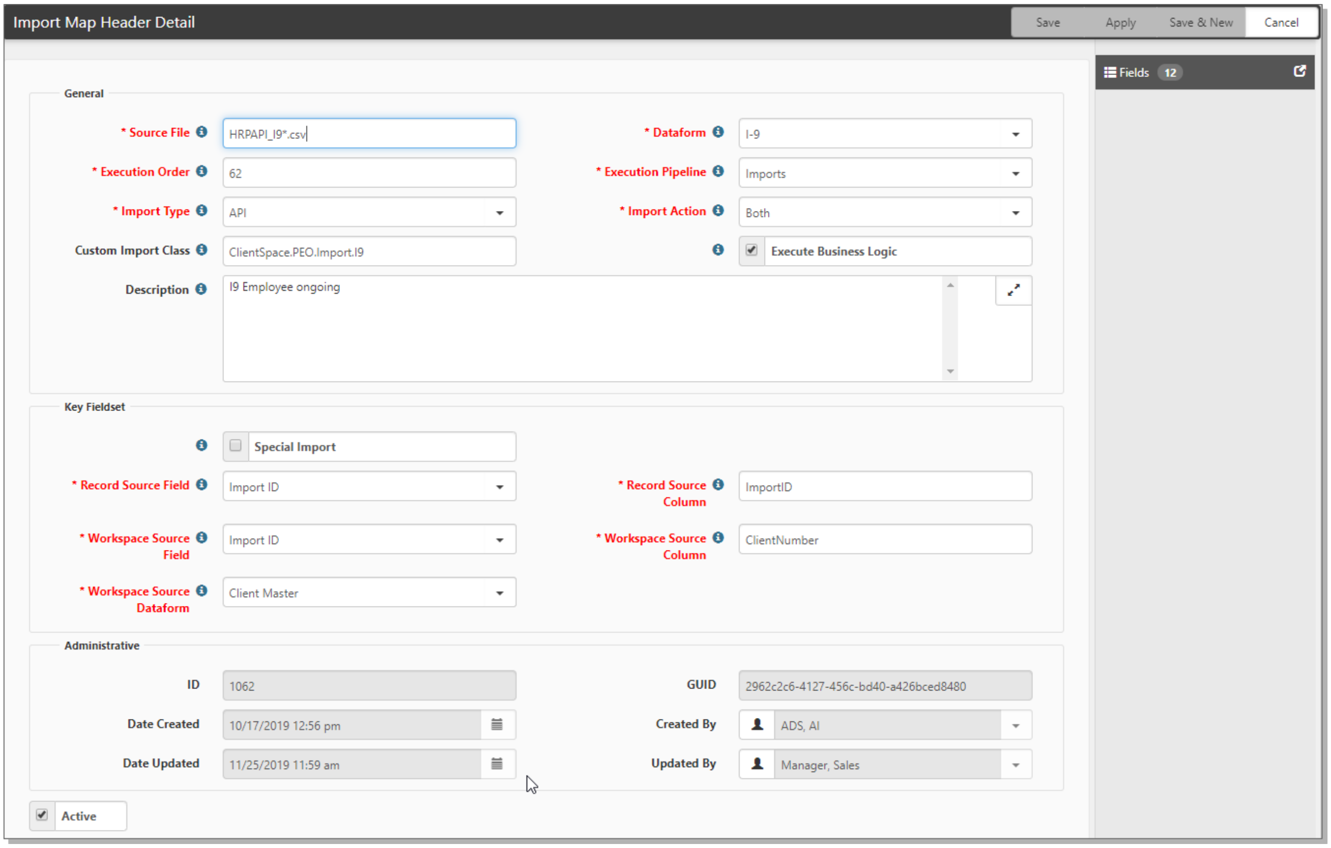
Field	Name
Billing Code	luBillingCode
Billing Amount	BillingAmount
Cost Amount	CostAmount
Payroll Batch	fkPayrollBatchID

I-9 HRPAPI Import Mappings

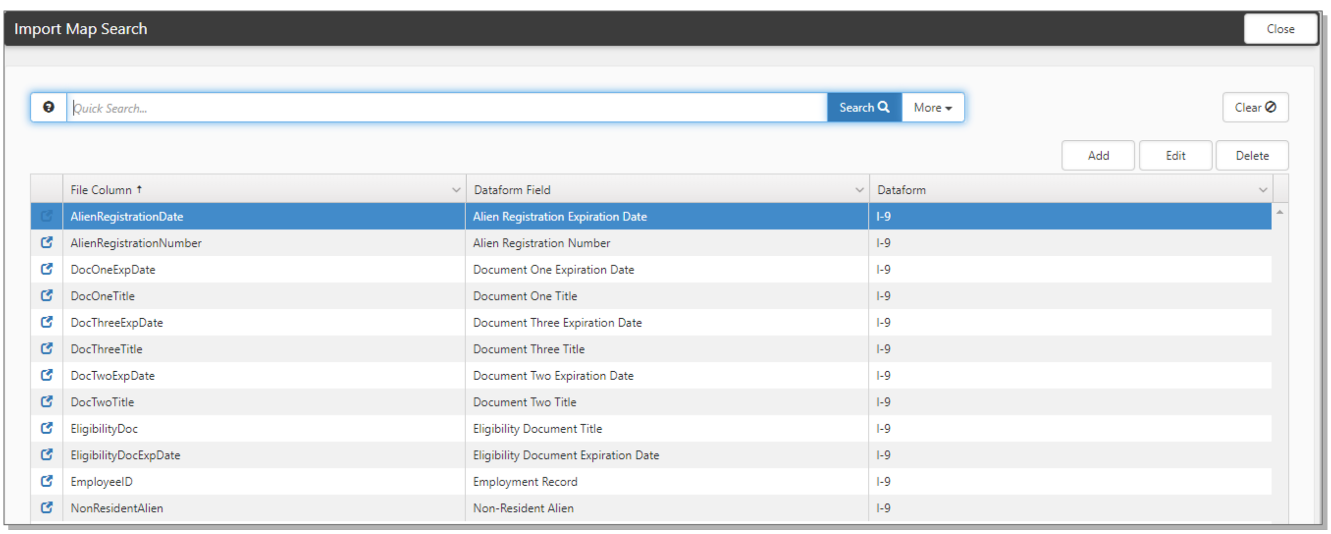
The following procedures provide details for viewing mappings as well as the dataform properties.

To view the mappings:

1. Go to **System Admin** > **Advanced** > **Configure Import**.
   The Import Map Header Search dashboard opens.
2. Locate **HRPAPI_I9*.csv** and click (**Jump**) to open the header detail.
   The Import Map Header Detail form opens.
   The following image presents the Import Map Header Detail for HRPAPI_I9*.csv.



3. To view the fields, click **Fields**.
   The Import Map Search list displays the I-9 Dataform fields.
   The following image lists the HRPAPI_I9*.csv fields.



To view the I-9 Dataform properties:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
   The Dataform Admin dashboard opens.
2. Locate **I-9** and click (**Jump**).
   The Dataform Properties for I-9 opens.
3. To view the fields, in the **Action Center**, click **Fields**.
   The I-9 Dataform fields display.

   The I-9 Dataform fields (for HRPAPI_I9*.csv) include Employment Record, I-9 Form, Status, Purge Date, Reverify Employee, Reverification & Rehires, Document One, Document Two, Document Three, Eligibility Document, Alien Registration, and Legacy.

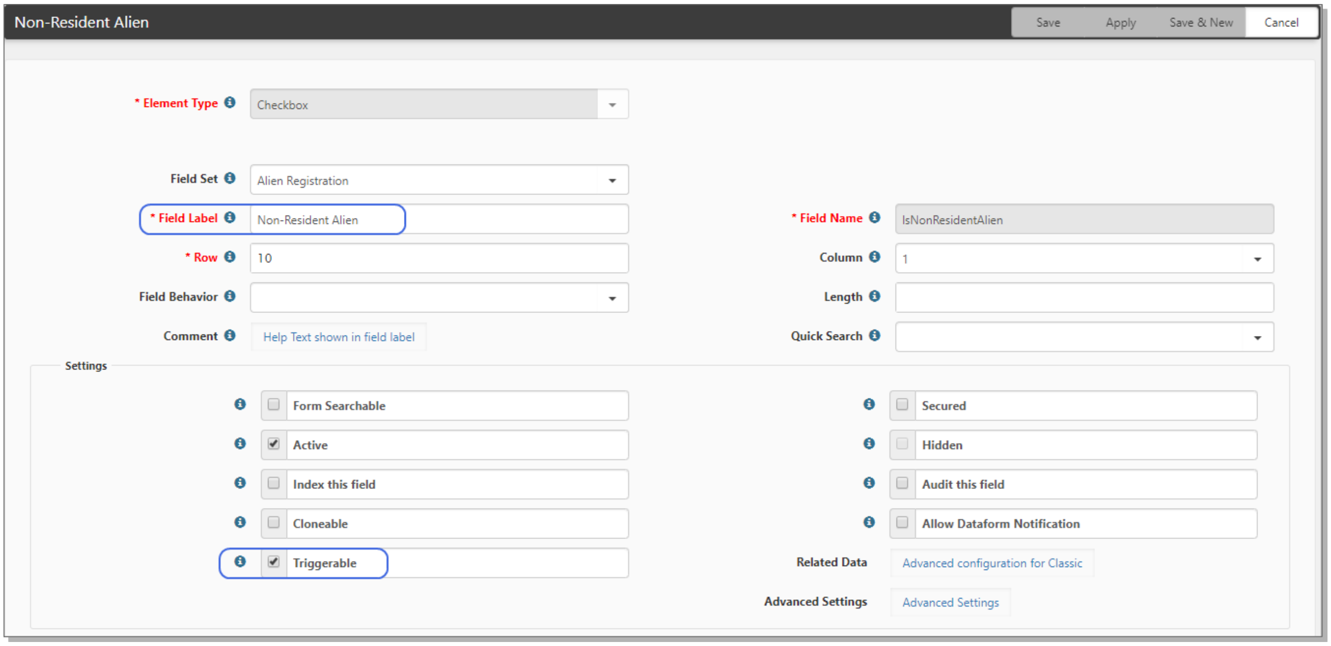
I-9

Field	Name
Employment Record	fkEmploymentRecordID
I-9 Form	I9Form
Status	luStatus
Purge Date	PurgeDate
Reverify Employee	luReverificationRehires
Reverification & Rehires	fsReverificationRehires
Reverification Method	luReverificationMethod
Reverification Date	ReverificationDate
Reason For Reverification	luReasonForReverification
Reverified I-9 Form	ReverifiedI9Form
Document One (Identity)	fsDocOne
Document One Title	luDocOneTitle
Document One Expiration Date	DateDocOneExp
Document Two (Identity)	fsDocTwo
Document Two Title	luDocTwoTitle
Document Two Expiration Date	DateDocTwoExp
Document Three (Identity)	fsDocThree

4. To view a field, such as Non-Resident Alien, locate the fieldset Alien Registration and select Non-Resident Alien.
5. Click (**Jump**).

   The details of the field display.

The following image shows the field Non-Resident Alien, which is located in the Alien Registration fieldset.



Can use in Workflows

With the ClientSpace PrismHR HRPAPI, you can import I-9 data into the I-9 management dataform and then use the dataform in workflows. The import uses **HRPAPI_initial_I9*.csv** and **HRPAPI_I9*.csv** import mappings.

To track an Employee's alien status within ClientSpace so that service providers can create workflows for document expiration, you can configure scheduled Workflow Channels to trigger before the expiration date of a document. Fields for tracking this data are available in the dataform **gen_I9** and marked as triggerable for workflows by default. See the previous image for an example of Triggerable in the field Non-Resident Alien.

Alien Registration (fsAlienRegistration)	fieldset
Non-Resident Alien (IsNonResidentAlien)	checkbox
Alien Registration Number (AlienRegistrationNumber)	text
Alien Registration Expiration Date (DateAlienRegistrationExpiration)	date

Any dataform field that is marked as Triggerable can be used in a workflow. See Adding dataform fields.

Lookup values

To map the selections for I-9 documents in Prism to ClientSpace, use the lookup values in the document lookup groups with Import IDs that match the Prism values. The following lookup values are configured for you in I-9 Documents.

I-9 Documents	ImportID
A - US Passport	A18
A - US Passport Card	A15
A - Perm. Resident (Form I-551)	A02
A - Alien Reg. Receipt Card (Form I-551)	A03
A - Foreign Passport with Temp. I-551 stamp	A04-2
A - Foreign Passport with Temp. I-551 MRIV	A05-2
A - Employment Auth. Document (Form I-766)	A06
A - Foreign Passport, work-authorized nonimmigrant	A07-3
A - FSM Passport with Form I-94	A08-2
A - RMI Passport with Form I-94	A09-2
A - Form I-94/I-94A	A11-2
A - Temporary I-551 Stamp	A16-2
A - Machine-readable immigrant visa (MRIV)	A17-2
A - Form I-20	A13-3
A - Form DS-2019	A14-3
B - Driver's license issued by state/territory	B01
B - ID card issued by state/territory	B21
B - Government ID	B13
B - School ID	B03
B - Voter Registration Card	B04
B - U.S. Military card	B22

I-9 Documents	ImportID
B - U.S. Military draft record	B14
B - Military dependent's ID card	B06
B - USCG Merchant Mariner card	B07
B - Native American tribal document	B08
B - Canadian driver's license	B09
B - School record (under age 18)	B23
B - Report card (under age 18)	B15
B - Clinic record (under age 18)	B24
B - Doctor record (under age 18)	B16
B - Hospital record (under age 18)	B17
B - Day-care record (under age 18)	B25
B - Nursery School record (under age 18)	B18
B - Individual under Age 18	B19
B - Special Placement	B20
C - Social Security Card (Unrestricted)	C01
C - FS-545	C02
C - DS-1350	C03
C - US Birth Certificate	C04
C - Native American tribal document	C05
C - Form I-197	C06
C - Form I-179	C07
C - Employment auth. document (DHS)	C08
C - FS-240	C09

Importing from PrismHR to ClientSpace

The following topics discuss importing data from PrismHR to ClientSpace.

Configuring the PrismHR API for Initial Imports

This section describes the PrismHR API Initial Import process with step-by-step configuration information. Before you start, you need to create a case with PrismHR to request access for ClientSpace to the API interface.

The **Initial** Import process, pulls all Client and related data from the PrismHR system into a ClientSpace installation. You must test the validity of the data retrieved by the API against existing data being imported into ClientSpace. This is crucial to ensure a smooth transition to API imports. See Before Go Live.

> If you try to configure this on your own and are not sure of your configuration or next steps, STOP, and log an Extranet case. When enabled, the API overwrites existing data values, potentially leading to data loss if not properly configured.

To get started, you need the following:

- HRP API URL
- HRP Callback URL
- HRP Username
- HRP Password
- HRP PEO ID

Also ensure that when setting up the PrismHR API for a Client, always request that the API account has access to the following API services:

- Login Service
- Subscription Service
- ClientMaster Service
- Employee Service

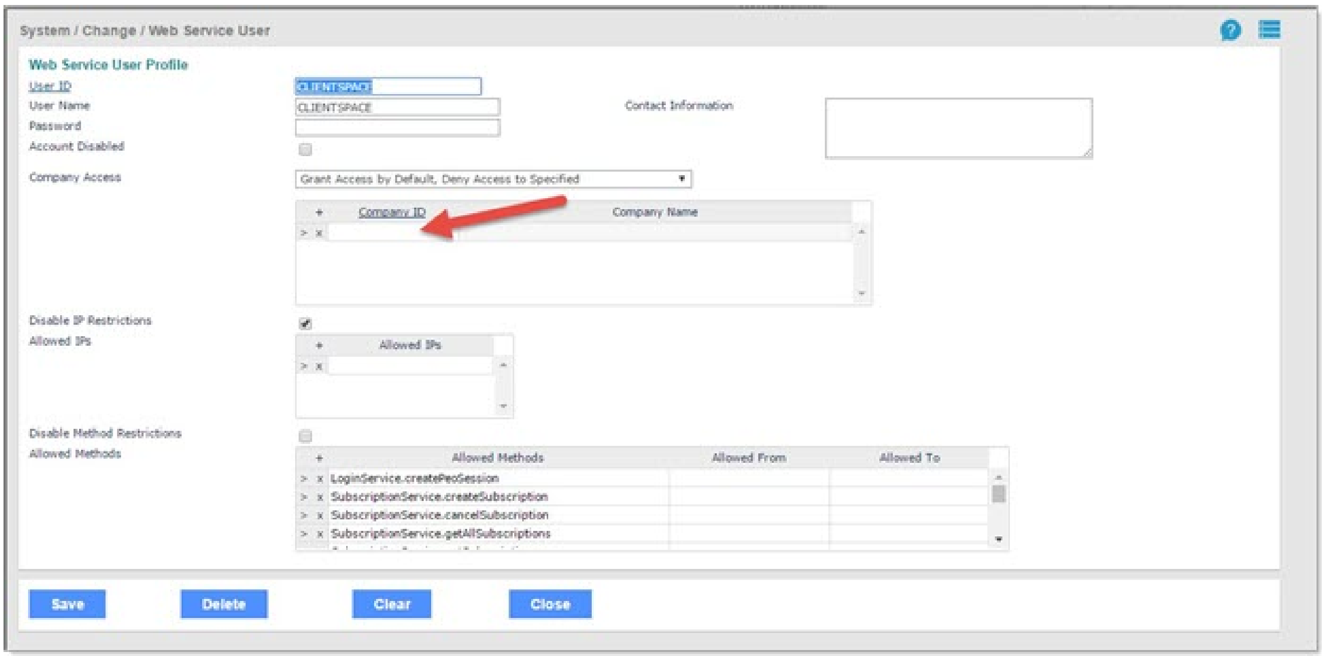
Web services company restricted list

Certain companies or employees should not be imported into ClientSpace (for example, the PEO itself). The **HRP Configuration tool** contains a Web Services Access Control interface. Companies that should **not** be imported into ClientSpace should be listed as **Deny** on the **Company List** form.

Perform the following steps in the HRP Configuration tool:

1. Go to **System** > **System Parameters** > **Action Menu** > **Web Service User** and open the CLIENTSPACE user.

2. Select **Grant Access by Default, Deny Access to Specified**. Specify which clients will be denied access.
3. Under **Company Access**, in **Company ID**, type the company IDs that you do **not** want the ClientSpace API to access.
4. **Save** the record.
   This prevents ClientSpace from accessing the company data from the listed clients.



Import Queue management

As records are retrieved from PrismHR, Import Queue (tblImportQueue) records are created and modified. The Import Queue Management dashboard and detail pages enable you to reset queue item statuses (reset to Pending, set to Complete) and to interrogate error data using the Log Data field.

All PrismHR failures are stamped on the Queue record. If the queue record fails to import, it is put in Failure status. The reason for the error is included in the log data row.

The Import Queue management suite is available from **System Admin** > **Imports** > **Manage Import Queue**.

Configuration includes:

- ImportIDs for Lookups and other data (ClientSpace)
- Import Map Headers (ClientSpace)

- Import Map Details (ClientSpace)
- API Configuration form (ClientSpace)
- The PrismHR Site

Import IDs

Certain Lookups and other data require translation to Prism values. This is done using ImportIDs on the following data.

Import IDs	
• Contract Type (ClientMaster) • Contract Status (ClientMaster) • HR Rep User • Sales Rep User • Employment Status (Employee) • Employment Type (Employee) • Marital Status (Employee)	• Gender (Employee) • Ethnic Classification (Employee) • Work State Filing Status (Employee) • Home State Filing Status (Employee) • Pay Method (Employment) • Pay Frequency (Employment)

Import Map Headers

Import Map Headers must be configured for each file type to be produced and MUST match the following PEO headers**. Configure the Custom Import Class for each Header.

File	Custom import class
HRPAPI_initial_company*.csv	ClientSpace.PEO.Import.ClientMaster
HRPAPI_initial_clientteam*.csv	No custom import class
HRPAPI_initial_employee*.csv	ClientSpace.PEO.Import.Employee
HRPAPI_initial_employment*.csv	ClientSpace.PEO.Import.Employment
HRPAPI_initial_location*.csv	ClientSpace.PEO.Import.Location

****These import map configurations should have been pushed to your site but may be inactive**. If you find these configurations do not on your site, log an Extranet case to have these configurations added.

HRP Subscription Dataforms

The following dataforms are typically used in the Admin Workspace:

- Client Schema
- Employee Schema
- Voucher Schema

Each form contains:

- **Schema**: For Import Ongoing only, defines the type of data this Subscription ID evaluates.
- **Subscription ID**: The HRP ID of the registered Subscription for this ClientSpace installation.
- **Replay ID**: The last Event marker processed, from the last time the Ongoing Scheduled Process successfully ran.
- **Voucher Last Process Date**: The last date the Voucher Scheduled Process successfully ran.
- **Notes**: General information such as the date and time the scheduled process ran, the Replay ID used.

Excludes Import Map Detail

Review the PrismHR Security subscription record to ensure that Users=activeUser is NOT part of the Excludes Import Map Detail for the HRPAPI_users import. The import must contain a valid record for the Active flag.

User status in PrismHR and ClientSpace

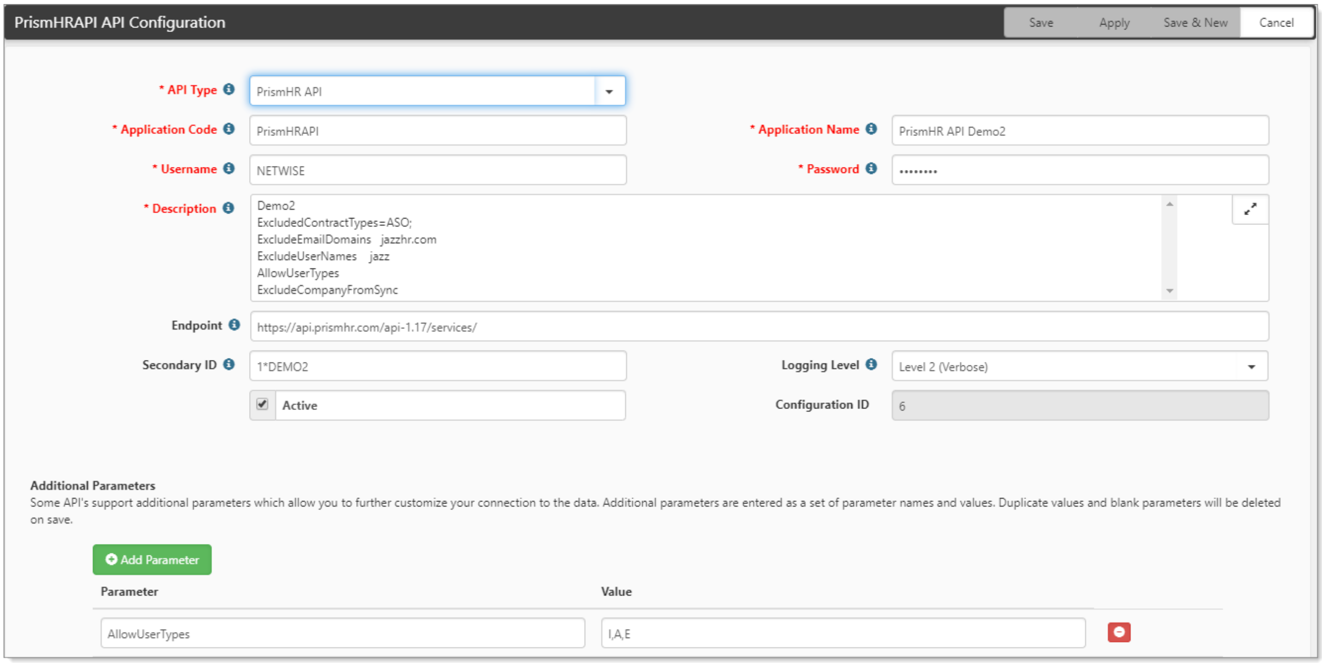
The ClientSpace user Active value is automatically set to the PrismHR value so that when a user is inactivated in PrismHR, the same status is reflected in ClientSpace.

Contact status in PrismHR and ClientSpace

When a Contact is deleted in PrismHR, the corresponding Contact in ClientSpace is marked as Inactive.

Configuring the API for Import Map Details

This topic guides you through configuring the Import Map Details. In the Add Parameter section, you specify a set of name-value pairs for each Field to be included in the import file.



To configure the API:

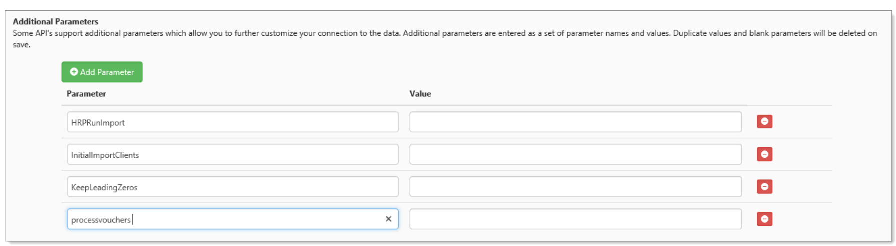
1. Go to **System Admin** > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. If there is no API entry in the list, then click **Add**.
   The API Configuration form opens. The API Configuration form has an API Configuration fieldset that contains the information necessary to connect to the specific PrismHR installation for the Client. The example shows test data. Use actual client data when configuring.

API Type	Select **PrismHR API**.
Application Code	Use a unique value to denote the PrismHR installation such as **PrismHRAPI**.
Application Name	Description that displays in the ClientSpace lists. Use something to indicate the installation such as **PrismHR API**.
Username	The username registered with the HRP API for this site.
Password	The password associated with the HRP Account Username for this site.
Description	Provide a description.
Endpoint	A formatted URL pointing to the API services for the specific HRP client

<table>
<tr><td></td><td>and site (must include the trailing / character).</td></tr>
<tr><td>Secondary ID</td><td>An identifier used to enable the monitoring of all HRP Clients at an installation.</td></tr>
<tr><td>Logging Level</td><td>

The HRP Export process for Company Information and Employee/Employment information contains significant log information to aid in monitoring the activity of the Exports from ClientSpace to HRP.
When set to Level 2 (Verbose), ALL log data is stored in the Scheduled Process History Table. This includes entry/status/exit entries for every HRP API call and ClientSpace action (up to the Import Phase). Errors and Information entries are created.
When set to Level 1, only ERRORS are logged to the Scheduled Process History Table.
When Set to Level 0 (None), No log data is produced.

</td></tr>
<tr><td>Active</td><td>When this option is selected, the configuration is active (enabled).</td></tr>
<tr><td>Configuration ID</td><td></td></tr>
<tr><td>Additional Parameters</td><td>
This is where you specify a set of name-value pairs to configure the process.



1. Click Add Parameter to begin adding these:

AllowUserTypes: Defines the types of users that are included in a user import:

I: Internal User. Someone who works for the PEO or someone at PrismHR.
M: Manager. Someone who works in payroll or human resources at one of the PEO's clients.
A: Trusted Advisor. Same as Manager but without an

</td></tr>
</table>

	Employee ID. Used for consultants. ◦ **E**: Employee. ◦ **S**: Super User in the legacy HRPWE. Similar to **I**. ◦ **C**: Client Manager in HRPWE. • **ContactImportBehavior**: ◦ **Insert/Both**: Allows Import Queue record creation for Contacts that are in Prism but not in ClientSpace. ◦ **Update**: Does not allow Import Queue record creation for Contacts that are in Prism but not in ClientSpace. Updates existing ClientSpace Contacts with changes. • **DefaultProjectCode**: Defines where an employee portal case is created if no workspace match is found. Uses ProjectCode from workspace settings. • **ExcludeCompanyFromSync**: ◦ **0**: The Company Initial import map is included in the Sync if the map is active (updates Company information and all other active Initial maps). **Note**: Initial sync of company data can be applied to individual workspaces using the option **Sync with PrismHR** on the Client Master. See PrismHR to ClientSpace Client sync. ◦ **1**: The Company Initial import map is NOT included in the Sync whether or not the map is active (all other active Initial maps are processed). • **ExcludedContractTypes**: ASO, HRO are the PrismHR Service Types that should not be imported into ClientSpace. • **ExcludeEmailDomains**: Email domains that should not be imported into ClientSpace. Supports comma separated list. • **ExcludeUserNames**: Usernames that should not be imported into ClientSpace. • **FailureRetryTime**: ◦ **0**: Reprocesses all failed import queue records. ◦ **X**: Reprocesses failed import queue records with an UpdatedDate greater than X hours.

	◦ If not present (default), failed import queue records are not reprocessed. • **HRPRunImport**: ◦ **1**: The files generated by the API Import automatically import into ClientSpace. ◦ **0**: The files generated by the API Import appear in the Manage Import File List at status Ready for Import. • **InitialImportClients**: Sets how many queue records of each import map type are processed at a time. • **InitialMaxEmployeeCount**: Sets the threshold of maximum number of Employees to import during a scheduled process run. ◦ If **no** Value is set, it processes all Employees for Clients (up to the InitialImportClients count) during a scheduled process run. ◦ If a Value is set, after obtaining a list of Employees, if the number exceeds the parameter Value, no additional processing occurs for that run. Subsequent runs for the scheduled process resume the import, picking up where the last run ended when the maximum threshold was met. This parameter eliminates session timeouts for groups of Clients with high Employee counts. • **KeepLeadingZeros**: ◦ **0**: Any leading zeros on CompanyID in PrismHR are stripped off before the Client Record is saved. ◦ **1**: Leading zeroes on CompanyID are retained when importing records into ClientSpace. • **NumberOfEvents**: Sets the max number of records to import per subscription record on each run of the HRPAPI_Ongoing import. Setting NumberOfEvents to 0 defaults the max records imported per subscription to 100. This parameter minimizes the risk of imports failing due to large record sets. • **processvouchers**: ◦ **0**: Queued Employee Payroll Vouchers are not processed immediately.

	◦ **1**: Employee Payroll Vouchers are processed as they are imported. • **RequireBillingVouchers**: ◦ **0**: If Billing Vouchers cannot be located for a Client, the Payroll Voucher data is processed (will be missing all Billing related mapped fields). ◦ **1**: The payroll is not processed for that Client (current behavior). If the parameter is not specified, it is assumed that RequireBillingVouchers=1 (current behavior).

3. Click **Save**.

How InitialImportClients and InitialMaxEmployeeCount work together

Let's look at how InitialImportClients and InitialMaxEmployeeCount are processed. The scenario is as follows:

- API Parameter **InitialImportClients** = 5 (5 clients will be processed during each scheduled process run)
- API Parameter **InitialMaxEmployeeCount**= 10 is the maximum number of Employees to import during a scheduled process run

First Scheduled Process Run

The first scheduled process run: 5 Clients at a time, Max Employee Threshold is 10

Client	Employees processed
Client 1 has 5 employees	5 Employees will be processed
Client 2 has 2 Employees	2 Employees will be processed
Client 3 has 4 Employees	4 Employees will be processed
Client 4 has 20 Employees	Client 4 will not be processed during this run, Max Employee Count has been exceeded

Client	Employees processed
Client 5 has 30 Employees	Client 5 will not be processed during this run, Max Employee Count has been exceeded

Second Scheduled Process Run

The second scheduled process run: 5 Clients at a time, Max Employee Threshold is 10

Client	Employees processed
Client 4 has 20 Employees	20 Employees will be processed
Client 5 has 30 Employees	Client 5 will not be processed during this run, Max Employee Count has been exceeded
Client 6 has 2 Employees	Client 6 will not be processed during this run, Max Employee Count has been exceeded
Client 7 has 50 Employees	Client 7 will not be processed during this run, Max Employee Count has been exceeded
Client 8 has 9 Employees	Client 8 will not be processed during this run, Max Employee Count has been exceeded

If InitialMaxEmployeeCount = 0, all Clients (up to InitialImportClients count) and their Employees will be processed each scheduled process run.

PrismHR Import Queue Initial Clients scheduled process

Note: Scheduled process **PrismHR Import Initial** is deprecated and should NO LONGER be used (the scheduled process is now scripted out as inactive).

Scheduled process **PrismHR Import Queue Initial Clients** obtains a list of all clients available through the API, creates Import records for each, and sets the Sync with PrismHR flag on the Client Master for each Client imported (company initial import map **HRPAPI_initial_company*.csv** MUST be active). The company initial import map contains the **Sync with PrismHR** column (scripted out active) to allow the setting of that flag on the Client Master.

The API Configuration Additional Parameter **InitialImportClients=x** determines how many clients at a time are processed when the scheduled process runs (Location, ClientTeam, Employee, Employment). The parameter defaults to 5 clients per PrismHR Import Initial scheduled process run. If the client number cannot be matched in PrismHR, the client is ignored. These related locations are then mapped into an import file for all clients based on the initial_location import configuration, and when all locations for all clients have been retrieved, the import begins. This process syncs the system with any missing or new client locations, at the end of which the scheduled process inactivates itself.

Scheduled process **PrismHR Import Initial Sync** then processes the Clients to Sync and imports the remaining ACTIVE Import Map data (employee, employment, location). The PrismHR Automation process is the preferred method to use when attempting to sync all client data. It handles the newer initial import process. It has logic to turn on/off respective scheduled processes to prevent conflicts (the Prism Events scheduled process is not included in this, it can be running while initials are running).

Parameters for the PrismHR Site

Use the following parameters to configure the PrismHR site before using the API. This configuration is done in the client Payroll System.

HRP site	Parameters
Valid User account	• Username (case sensitive) • Password (case sensitive) • PEO ID (case sensitive) • HRP API URL. The endpoint of the WSDL on the server to be used.
Account	The Account must be Enabled.
Subscriptions	The Account must have permission to create subscriptions (for Imports only). The following subscriptions are automatically created on the PrismHR server when the process first executes: • Employee/Person | Client | Compensation. Description is: “ClientSpace Employee Person-Client-Compensation Subscription All Clients” • Client/Master | Location. Description is "ClientSpace Client master Subscription All Clients”

HRP site	Parameters

Requirements	PrismHR requires the following for each Client:
	• Business Entity Type (Example: LLC, S Corp, etc.) (Client Details)
	• Payroll Check Account (Account)
	• Garnishments Check Account (Account)
	• Receipts Account (Account)
	• Processing Schedule (Control)
	• GL Template (Control)
	• Bill Format (Billing)
	• Billing Template (Billing)
	• Delivery Method (Payroll)
	• Pay Groups (Payroll)
	    • Pay Groups (Payroll)
	    • Pay Group
	    • Description
	    • Pay Schedule
	    • Pay Date
	• Job Codes (Positions)

Process

1. The Client and Employee records are **AUTOMATICALLY** populated by the PrismHR Import Queue Initial Clients Scheduled Process. For the system to auto populate the record, you need to create stub records for the Client and Employee imports:
   - Create two semi-blank PrismHR Subscription dataforms, one for Client and one for Employee. On these forms, select the Schema and Classes (Client-Master,Location; Employee-Person,Client,Compensation)
     - On those dataforms leave all other fields empty (no Subscription ID, no Replay ID, etc.)
     - Run the Import Ongoing scheduled process
   - If the connection info is correct and PrismHR has properly configured our user account, the process
     - acknowledges that two new subscriptions have to be created in HRP
     - creates the new subscriptions in PrismHR
     - updates our subscription dataforms with the new information

   - checks for any new events (most likely there will not be any since we grab the highest event replay id when the subscription is created)
   - exits
2. Run the **PrismHR Import Queue Initial Clients** scheduled process (before PrismHR Import Initial).
3. All Companies available on the PrismHR site are imported.
4. Special Import Queue records are generated for each Company AND FOR EACH ACTIVE INITIAL IMPORT MAP HEADER (Location, ClientTeam, Employee, Employment), as in:

106!.!106!.!Location	(Company 106, Location import map)
106!.!106!.!ClientTeam	
106!.!106!.!Employee	
106!.!106!.!Employment	
107!.!107!.!Location	(Company 107, Location import map)
107!.!107!.!ClientTeam	
107!.!107!.!Employee	
107!.!107!.!Employment	

5. Those Import Queue records are set to Status = **InitialPending**.
6. The PrismHR Import Queue Initial Clients should only execute once. If for some reason it needs to execute multiple times, **DELETE** all of the Import Queue Records before proceeding.
7. Run the **PrismHR Import Initial Sync** scheduled process.
   A list of active Initial Import Maps is retrieved.
8. For each Map, a list of Import Queue records for that map are retrieved (the quantity to process is defined by API Config **InitialImportClients=x**).
9. Import files are generated
   - If HRPRunImport=1, those Import Queue records are marked as InitialCompleted.
   - If HRPRunImport=0, those Import Queue records are left at InitialPending and are retrieved again the next time the process is run.
10. Assuming HRPRunImport=1, running the PrismHR Import Initial again grabs the next set of Import Queue records (those marked InitialPending). This continues until all Import Queue records are processed (marked InitialCompleted).
11. To see if the process was successful, review the HRP API Import Ongoing log ad hoc report.

Before Go Live

When configured, a series of tests should be performed to compare the validity of the data retrieved by the API against existing data being imported into ClientSpace. This is crucial to ensure a smooth transition to API imports.

These tests involve running the imports manually with the additional parameter of **HRPRunImport=0** to generate the files, but not import them. Then you should scrutinize the files for accuracy and completeness.

Skipping the data validation testing can lead to duplicated or corrupted data, so it is critical to perform these validations before automating the API imports. If you need help with validation or have questions about this process, log an Extranet case.

Configuring the PrismHR API for Ongoing Imports

This topic describes the PrismHR API Import process and includes step-by-step configuration information to help you get started using the PrismHR API. Before you begin, log an Extranet case for your implementation specialist to configure the API interface. The implementation specialist will need you to provide:

- HRP Username
- HRP Password
- HRP PEO ID
- HRP API URL

The processes described in this topic are for an **Ongoing** process, which pulls changes from the PrismHR system into a ClientSpace installation. If you are not sure of your configuration or the next steps, stop, and log an Extranet case. After enabled, the API overwrites existing data values, potentially leading to data loss if not properly configured.

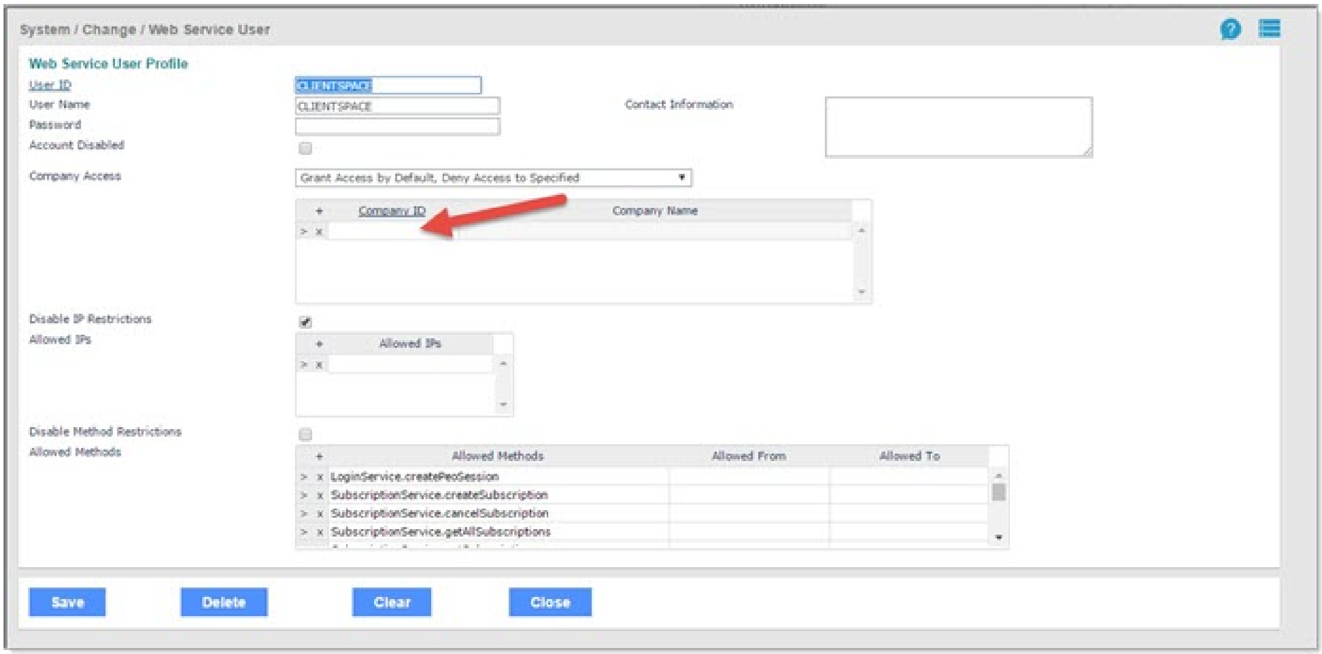
Web services company restricted list

Certain companies or employees should not be imported into ClientSpace (for example, the PEO itself). The **HRP Configuration tool** contains a Web Services Access Control interface. Companies that should **not** be imported into ClientSpace should be listed as **Deny** on the **Company List** form.

Perform the following steps in the HRP Configuration tool:

1. Go to **System** > **System Parameters** > **Action Menu** > **Web Service User** and open the CLIENTSPACE user.
2. Select **Grant Access by Default, Deny Access to Specified**. Specify which clients will be denied access.

3. Under **Company Access**, in **Company ID**, type the company IDs that you do **not** want the ClientSpace API to access.
4. **Save** the record.
   This prevents ClientSpace from accessing the company data from the listed clients.



Import Queue management

As records are retrieved from PrismHR, Import Queue (tblImportQueue) records are created and modified. The Import Queue Management dashboard and detail pages enable you to reset queue item statuses (reset to Pending, set to Complete) and interrogate error data using the Log Data field.

When the queue record fails to import into ClientSpace, we stamp the error message onto the Queue record for the following Ongoing import types:

- Location
- I9
- Employee
- Employment
- Contact
- User
- PayrollBatch
- Company

- ClientTeam
- Codes
- Employee Future Change

To access the management suite:

- Go to **System Admin** > **Imports** > **Manage Import Queue**.

Configuration includes

The configuration includes the following steps:

- ImportIDs for Lookups and other data (ClientSpace)
- Import Map Headers (ClientSpace)
- Import Map Details (ClientSpace)
- API Configuration form (ClientSpace)
- HRP Subscription Dataforms (ClientSpace)
- The PrismHR site parameters

Import IDs

Certain Lookups and other data require translation to PrismHR values. Translation occurs by using ImportIDs on the following data:

• Contract Type (ClientMaster)	• Contract Status (ClientMaster)
• HR Rep User	• Sales Rep User
• Employment Status (Employee)	• Employment Type (Employee)
• Marital Status (Employee)	• Gender (Employee)
• Ethnic Classification (Employee)	• Work State Filing Status (Employee)
• Home State Filing Status (Employee)	• Pay Method (Employment)
• Pay Frequency (Employment)	

Import Map Headers

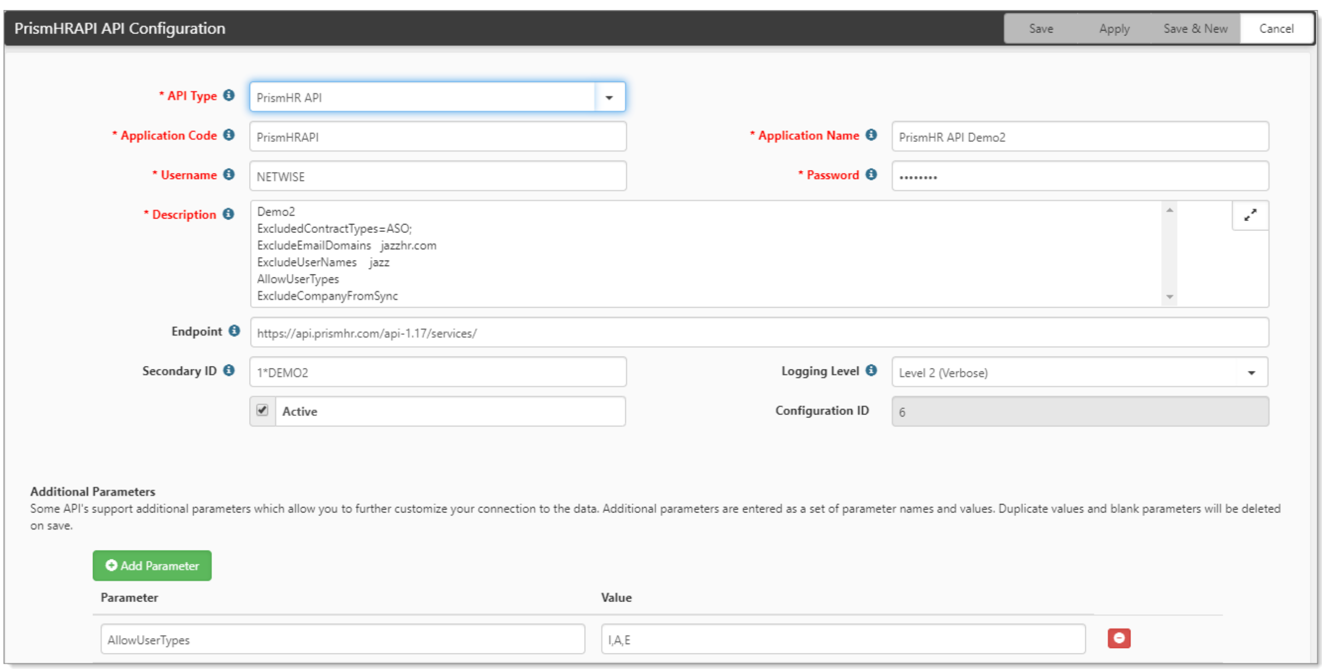
Configure the Import Map Headers for each file type to be produced. The configured headers MUST match the PEO headers listed in the following table. You must configure the Custom Import Class for each Header.

Import file	Import Map Header
HRPAPI_company_ongoing*.csv	ClientSpace.PEO.Import.ClientMaster
HRPAPI_clientteam_ongoing*.csv	No custom import class
HRPAPI_employee*.csv	ClientSpace.PEO.Import.Employee
HRPAPI_employment*.csv	ClientSpace.PEO.Import.Employment
HRPAPI_location*.csv	ClientSpace.PEO.Import.Location
HRPAPI_voucher*.csv	ClientSpace.PEO.Import.EmployeeVoucher
HRPAPI_payroll_batch*.csv	ClientSpace.PEO.Import.PayrollBatch

These import map configurations should have been pushed to your site but may be inactive. If you find these configurations do not exist on your site, log an Extranet case to add these configurations.

Configuring the API for Import Map Details

Import Map Details must be configured with an API Path value for each Field to be included in the import file.



To configure the API:

1. Go to **System Admin** > **Advanced** > **API Configuration**.

The API Configuration dashboard opens.

2. On the **PrismHRAPI** item, click (**Open**).
3. Configure as appropriate for your organization.

   API Configuration has an API Configuration fieldset that contains the information necessary to connect to the specific HRP installation for the Client. (The screenshot shows test data. Use actual client data when configuring.)

API Type	Select **PrismHR API**.
Application Code	Use a unique value to denote the PrismHR installation such as **PrismHRAPI**.
Application Name	Description that displays in the ClientSpace lists. Use something to indicate the installation such as **PrismHR API**.
Username	The username registered with the HRP API for this site.
Password	The password associated with the HRP Account Username for this site.
Description	Provide a description.
Endpoint	A formatted URL pointing to the API services for the specific HRP client and site (must include the trailing **/** character).
Secondary ID	An identifier used to enable the monitoring of all HRP Clients at an installation.
Logging Level	• The HRP Export process for Company Information and Employee/Employment information contains significant log information to aid in monitoring the activity of the Exports from ClientSpace to HRP. • When set to Level 2 (Verbose), ALL log data is stored in the Scheduled Process History Table. This includes entry/status/exit entries for every HRP API call and ClientSpace action (up to the Import Phase). Errors and Information entries are created. • When set to Level 1, only ERRORS are logged to the Scheduled Process History Table. • When Set to Level 0 (None), No log data is produced.
Active	When this option is selected, the configuration is active (enabled).
Configuration ID	

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<td>Additional Parameters</td>
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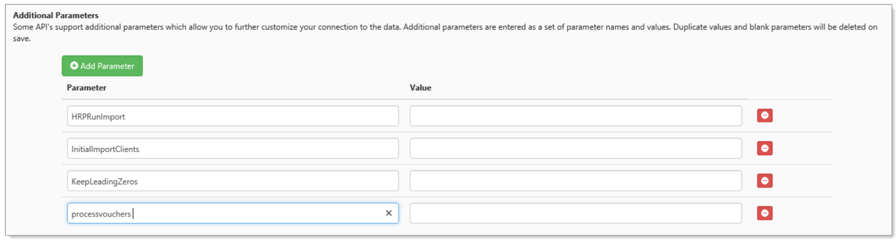
This is where you specify a set of name-value pairs to configure the process.


Click Add Parameter to begin adding these:

AllowUserTypes: Defines the types of users that are included in a user import:

I: Internal User. Someone who works for the PEO or someone at PrismHR.
M: Manager. Someone who works in payroll or human resources at one of the PEO's clients.
A: Trusted Advisor. Same as Manager but without an Employee ID. Used for consultants.
E: Employee.
S: Super User in the legacy HRPWE. Similar to I.
C: Client Manager in HRPWE.

ContactImportBehavior:

Insert/Both: Allows Import Queue record creation for Contacts that are in Prism but not in ClientSpace.
Update: Does not allow Import Queue record creation for Contacts that are in Prism but not in ClientSpace. Updates existing ClientSpace Contacts with changes.

DefaultProjectCode: Defines where an employee portal case is created if no workspace match is found. Uses ProjectCode from workspace settings.
ExcludeCompanyFromSync:

0: The Company Initial import map is included in the Sync if the map is active (updates Company information and all other active Initial maps). Note: Initial sync of company data can be

</td>
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</table>

	applied to individual workspaces using the option **Sync with PrismHR** on the Client Master. See PrismHR to ClientSpace Client sync. ◦ **1**: The Company Initial import map is NOT included in the Sync whether or not the map is active (all other active Initial maps are processed). • **ExcludedContractTypes**: ASO, HRO are the PrismHR Service Types that should not be imported into ClientSpace. • **ExcludeEmailDomains**: Email domains that should not be imported into ClientSpace. Supports comma separated list. • **ExcludeUserNames**: Usernames that should not be imported into ClientSpace. • **FailureRetryTime**: ◦ **0**: Reprocesses all failed import queue records. ◦ **X**: Reprocesses failed import queue records with an UpdatedDate greater than X hours. ◦ If not present (default), failed import queue records are not reprocessed. • **HRPRunImport**: ◦ **1**: The files generated by the API Import automatically import into ClientSpace. ◦ **0**: The files generated by the API Import appear in the Manage Import File List at status Ready for Import. • **NumberOfEvents**: Sets the max number of records to import per subscription record on each run of the HRPAPI_Ongoing import. Setting NumberOfEvents to 0 defaults the max records imported per subscription to 100. This parameter minimizes the risk of imports failing due to large record sets. • **RequireBillingVouchers**: ◦ **0**: If Billing Vouchers cannot be located for a Client, the Payroll Voucher data is processed (will be missing all Billing related mapped fields). ◦ **1**: The payroll is not processed for that Client (current behavior). If the parameter is not specified, it is assumed that RequireBillingVouchers=1 (current behavior).

HRP Subscription Dataforms

In the Admin workspace, there will typically be three of these Dataforms:

- Client Schema
- Employee Schema
- Payroll Schema
- Security Schema
- Voucher Schema

Each form contains:

Schema	For Import Ongoing only, defines the type of data this particular Subscription ID evaluates
Subscription ID	The HRP ID of the registered Subscription for this ClientSpace installation.
Replay ID	The last Event marker processed from the last time the Ongoing Scheduled Process successfully ran.
Voucher Last Process Date	The last date the Voucher Scheduled Process successfully ran.
Notes	General information such as the date and time the scheduled process ran, the Replay ID used.

The Client, Employee, Payroll, and Security records are AUTOMATICALLY populated by the HRP Import Ongoing Scheduled Process.

For the system to auto-populate the record, you will need to create stub records for the Client and Employee imports.

To create stub records:

1. Create semi-blank HRP Subscription dataforms, one for Client, Employee, Payroll, and Security. On these forms, all you have to do is select the Schema and Classes (Client-Master,Location; Employee-Person,Client,Compensation).
2. On those dataforms leave all other fields empty (no subscription id, no replay id, etc.).
3. Run the Import Ongoing scheduled process.
4. If the connection info is correct and PrismHR has properly configured our user account, the process will:
   - acknowledge that two new subscriptions must be created in HRP
   - create the new subscriptions in HRP

- update our subscription dataforms with the new information
- check for any new events (most likely there will not be any since we grab the highest event replay id when the subscription is created)
- exit

5. Review the HRP API Import Ongoing log ad hoc report to see if the process was successful.
6. The Voucher record must be manually generated:
    - Schema: Voucher
    - Voucher Last Process Date: enter the date from which you wish to Import Vouchers. After this field is populated and the Import Voucher Scheduled Process runs, the process will update this field
    - No other fields need to be configured

PrismHR Site parameters

The PrismHR Site must be configured with the following parameters before the use of the API can commence. This configuration is performed in the client Payroll System.

Valid User account	• Username (case sensitive) • Password (case sensitive) • PEO ID (case sensitive) • HRP API URL. The endpoint of the WSDL on the server to be used
The Account must be Enabled	
The Account must have permission to create subscriptions (for Imports only).	The following subscriptions will be automatically created on the HRP server when the process first executes: • Employee/Person|Client|Compensation. Description is “ClientSpace Employee Person-Client-Compensation Subscription All Clients” • Client/Master|Location. Description is "ClientSpace Client master Subscription All Clients”
HRP requires the following for each Client:	• Business Entity Type (Example: LLC, S Corp) (Client Details) • Payroll Check Account (Account) • Garnishments Check Account (Account) • Receipts Account (Account) • Processing Schedule (Control)

	• GL Template (Control)
	• Bill Format (Billing)
	• Billing Template (Billing)
	• Delivery Method (Payroll)
	• Pay Groups (Payroll)
	    • Pay Group
	    • Description
	    • Pay Schedule
	    • Pay Date
	    • Job Codes (Positions)

The Scheduled Process

There are two scheduled processes involved in the HRP Import function:

- **HRP Import Ongoing** process generates the following standard Import files:
  - HRPAPI_company_ongoing*.csv
  - HRPAPI_clientteam_ongoing*.csv
  - HRPAPI_employee*.csv
  - HRPAPI_employment*.csv
  - HRPAPI_location*.csv
- **HRP Import Voucher** process generates the following standard Import file:
  - HRPAPI_voucher*.csv

Service Provider user type

Prism users who are not Service Provider user types are not imported using the HRPAPI_Users initial and ongoing imports. The user types included in the user import is determined using the AllowUserTypes parameter.

Existing inactive users

Existing inactive users are deleted if a change is made to these users in PrismHR and the user is still inactive. The system will not delete user accounts without being triggered by a change to a user account in PrismHR.

Additional parameters

Additional parameters used by the PrismHR API include:

DefaultProjectCode	Sets the default workspace for a record if the system is unable to determine it
KeepLeadingZeros	Tells the system to not strip leading zeroes from the client number value stored in PrismHR
ExcludedContractTypes	Sets the system to ignore clients in the PrismHR system based on the Service Type. (comma delimited)
	• Add ExcludedContractTypes=XXX,YYY to the Additional Parameters section of the API configuration replacing XXX,YYY with the comma separated (or singular) list of PrismHR Service Types. • Service Types must be comma-separated (if there are multiples to exclude). • This setting applies to Import Initial Queue Clients and Import Initials scheduled processes. • If a Client is of an excluded contract type, it is not included in the import file. • Import Queue records are not created for Clients that are excluded (for remaining initial import maps).
ExcludeEmailDomains	Allows a comma-separated list of partial email domains to be added. If a user account has an email domain that starts with the excluded string, the user account is not imported. Example: ExcludeEmailDomains=PrismHR,gmail would exclude any user with an email domain beginning with PrismHR or Gmail such as PrismHR.com.
ExcludeUserNames	Allows a comma-separated list of partial UserIDs from the PrismHR payroll system to be added. If a user account has a UserID that starts with the excluded string, the user account is not imported.
AllowUserTypes	If not valid, user type is blank, will inactivate existing records if present. UserTypes are: • E: Worksite Employee • M: Worksite Manager • A: Worksite Trusted Advisor • I: Service Provider
NumberOfEvents	Sets the max number of records to import per subscription record on

	each run of the HRPAPI_Ongoing import. Setting NumberOfEvents to 0 defaults the max records imported per subscription to 100. This parameter minimizes the risk of imports failing due to large recordsets.
ContactImportBehavior	• **Insert/Both**: Allows Import Queue record creation for Contacts that are in Prism but not in ClientSpace. • **Update**: Does not allow Import Queue record creation for Contacts that are in Prism but not in ClientSpace. Updates existing ClientSpace Contacts with changes.

Importing to ClientSpace

The PrismHR Import Ongoing process evaluates PrismHR Events (Company and Employee changes) that may affect existing ClientSpace Client and Employee data, as well as those events that create new Clients and Employees. All active ongoing import map configurations are processed each time the scheduled process executes, on the same set of PrismHR Events (this minimizes the amount of data retrieved from PrismHR). Data from PrismHR is extracted and loaded into ClientSpace through scheduled processes.

Client records

For PrismHR API Ongoing events, ClientSpace ignores inactive Client Master records. When events are retrieved and converted into Import Queue records, for non-Company ongoing import maps, the Client associated with the event must be in ClientSpace. If not, the event is discarded, and an Import Queue record is not created for that event.

- The scheduled process **PrismHR Import Ongoing**, imports ongoing data for clients **only** when a matching client number exists in ClientSpace.
- If the Client Number exists but the Client is not in a Status of Client, PendingTermination, Termination, or UnderContract, the event is ignored.
- If the ongoing event is a Client schema event (UPDATE or CREATE), the event is processed, and an Import Queue record is created.
- If the event is a Security schema event, the event is processed, and an Import Queue record is created.
- All other events test whether the associated Client exists; if not, the ongoing event is skipped. No Import Queue record is created, and a Business Intelligence report entry is logged `"--- Create Import Queue Events, ClientNumber not found in ClientSpace, this event will not be processed"`.

- If a DELETE event is received for a Client, the Import Queue record is automatically completed without attempting to retrieve the Client details. No import row is generated. The Queue record is marked with a comment indicating the Client was deleted from PrismHR.

Employee and Employment records

Employee records

- When an Employee record is not found in PrismHR, the associated Event Import Queue record is marked Completed with a note indicating the Employee was removed from PrismHR.
- For Employee records, when a DELETE queue record is created, ClientSpace inactivates the associated Employee record.
- For Employment records, when a DELETE queue record is created, ClientSpace sets the status of the associated Employment record to Deleted.
- Future changes are supported by the import configuration HRPAPI_emp_futurechange*.csv, which captures Termination Date and Termination Reason from the employee record when that date occurs in the future. You can synchronize the fields for future changes while leaving the employment status Active.

Employment records

- For Employment data on an Employee that is not found in ClientSpace, the system creates a stub Employee record and populates the Employee ID and ImportID. The record is set to Active. The stub Employee record is created to accept Employment data. The system creates a new Employee Import Queue record in Pending status. This action populates the new Employee data the next time the scheduled process runs.
- If the AnnualPay field from PrismHR is not between -10,000,000.00 and 10,000,000.00, the AnnualPay field value is not imported into ClientSpace. In the Employment record, the field Invalid Annual Pay field is selected, and the Annual Pay is not set for the employee. This logic applies to Employment imports that use the **ClientSpace.PEO.Import.Employment** Custom Import Class (in the Import Map Header Detail).

Benefit data

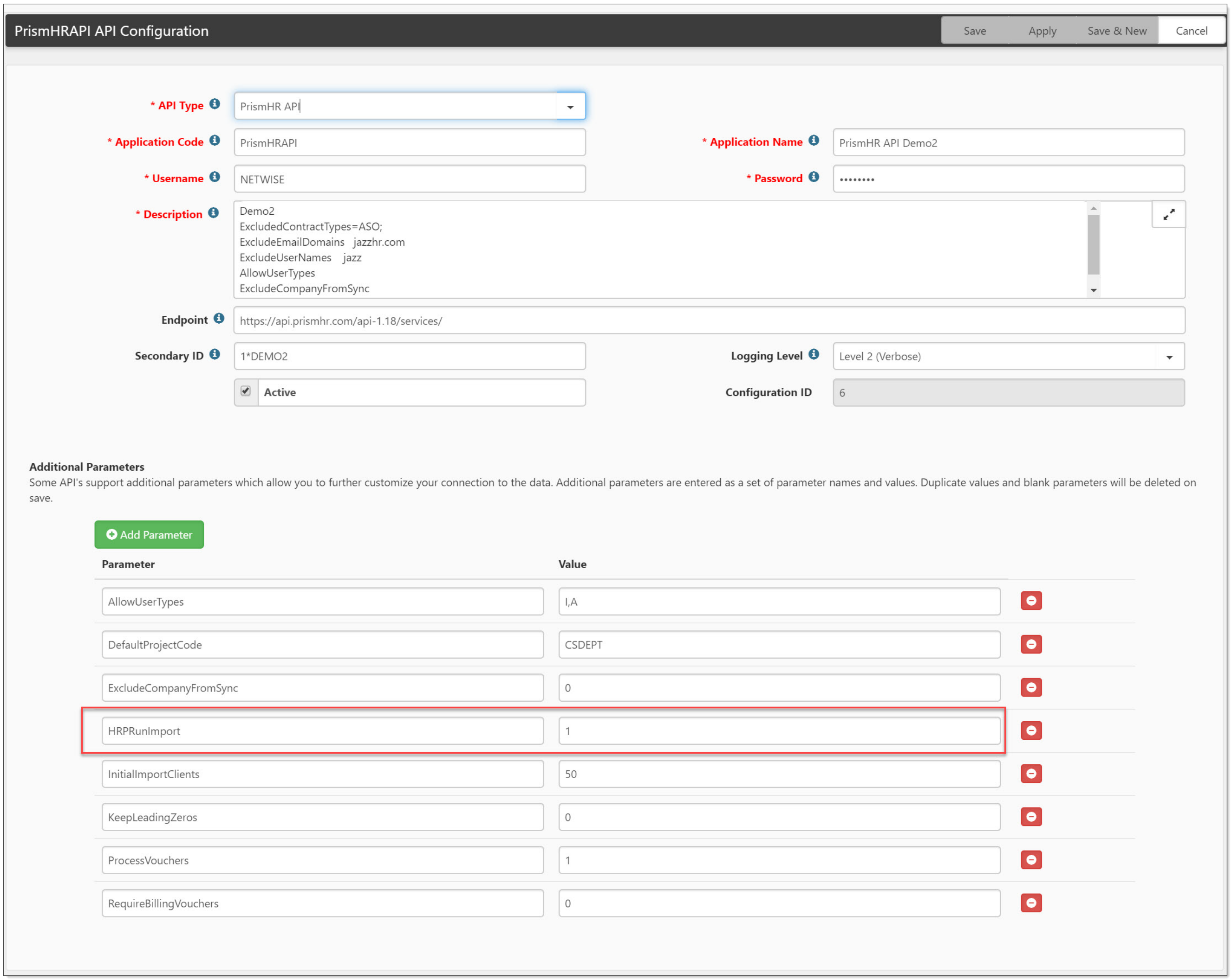
- If the Employment record is not found, the Import Queue record is set to Completed, with a note indicating the Employment record was not found.

Location records

- For Location records, when a DELETE queue record is created, ClientSpace inactivates the associated Location record.
- Location events with locationCode values containing **#** or **&** are processed.

The process

- Based on the PrismHR configuration data provided, the process logs into the PrismHR server. Failure to log in terminates the process (a log entry is generated).
- A list of PrismHR Subscriptions is retrieved from PrismHR.
  - Typically, there are two Subscriptions: Company Information and Employee Information.
  - The Subscriptions establish the type of information that must be monitored for change (Events).
- The API parameter value for HRPRunImport is retrieved, and if set to **1**, a list of Import Map Configurations is retrieved from ClientSpace in this order:
  - HRPAPI_company_ongoing
  - HRPAPI_clientteam_ongoing
  - HRPAPI_location
  - HRPAPI_employee
  - HRPAPI_employment



For each Subscription

- The last ReplayID is retrieved from ClientSpace. This indicates the last Event that was retrieved by the process. All Events from that point to the current point in time are evaluated.
- If the last ReplayID is equal to the current value associated with the Subscription (meaning no Events have occurred since the last process run time), no new events are retrieved from PrismHR.
- If the Replay IDs are different, a list of Events is retrieved from PrismHR, from the last ReplayID to the current point in time. These Events are associated with this instance of the Subscription ID.

For each Import Map configuration

- A list of Import Map Fields and Paths is retrieved.
- For each new Event, if the Event action is Delete, no action is taken on this Event.
- For each Modified Attribute in the Event, the Modified Attribute (the actual field in PrismHR that has changed) is compared to the list of Import Map Paths.
    - If the Modified Attribute is not found in the Import Map Path list, this Event is ignored. Because it is a change, ClientSpace does not need to process. The associated Subscription dataform is updated with this Attribute as an Exclude value.
    - If the Modified Attribute is found in the Import Map Path list, the Company or Employee for which this Event is associated is saved for Import.
- After all Events are evaluated, the result is a list of distinct Companies and Employees that will be queued. For example:
    - EventID 1: Company 123 Address changed
    - EventID 2: Company 123 Phone changed
    - EventID 3: Company 456 Fax changed
- These three Events produce the following list of Companies to be queued:
    - Company 123 and Company 456.
    - Company 123 is only in the list once even though it had multiple changes. The process only operates on the unique set of Company or Employee changes.

For each Company or Employee in the list

- An entry is created in tblImportQueue with the following data:
    - The current Import Map Header ID
    - A formatted Identifier (EventObjectID!.!EventClientID!.!EventSchema)
    - Status of Pending

After all Import Map Configurations are processed

- The ClientSpace Subscription dataform associated with this Subscription is updated with the latest ReplayID from the Event list.
- Regardless of whether new events were available, queued events are then processed, for each Import Map Configuration, a list of Import Map Fields and Paths is retrieved

  - A call to tblImportQueue is made to retrieve event details for and queued record whose status = Pending or Failed
  - A call is made to PrismHR to retrieve specific Company/Employee/Location data for each queue record.
  - Based on Import Map Fields and Paths and the Company or Employee data retrieved from PrismHR, an Import file row is constructed for the particular Import Map being processed.
  - The Import file row is presented to any Custom Import Business Class for further manipulation (if configured).

After all Companies or Employees are processed

- The Import File is generated and uploaded to ClientSpace, status = Ready for Import.
- If the configuration value **HRP Run Import** is set to **True**, the file is immediately imported using the ClientSpace Import process.
- The next Import Map configuration is processed.

The next Subscription is processed

- After all Subscriptions are processed, the process logs out of the PrismHR server.

Excludes Import Map Detail

Review the PrismHR Security subscription record to ensure that Users=activeUser is NOT part of the Excludes Import Map Detail for the HRPAPI_users import. The import must contain a valid record for the Active flag.

User status in PrismHR and ClientSpace

The ClientSpace user Active value is automatically set to the PrismHR value so that when a user is inactivated in PrismHR, the same status is reflected in ClientSpace.

PrismHR API user-related processes for initial and ongoing imports

The processes, PrismHR Import Users (initial imports), and PrismHR Import Ongoing (includes ongoing user imports) handle Active / Inactive user records in PrismHR and ClientSpace in the following manner.

Initial Imports: Insert

PrismHR User Status	ClientSpace User Status	After Import ClientSpace User
Active	N/A	Inactive
Inactive	N/A	Inactive
Excluded	N/A	Not Imported

Initial Imports: Update

PrismHR User Status	ClientSpace User Status	After Import ClientSpace User
Active	Active	Active
Active	Inactive	Inactive
Inactive	Active	Inactive
Inactive	Inactive	Inactive
Excluded	Not Imported	Not Imported

Ongoing Imports: Insert

PrismHR User Status	ClientSpace User Status	After Import ClientSpace User
Active	N/A	Inactive
Inactive	N/A	Inactive
Excluded	N/A	Not Imported

Ongoing Imports: Update

PrismHR User Status	ClientSpace User Status	After Import ClientSpace User
Active	Active	Active
Active	Inactive	Inactive
Inactive	Active	Inactive

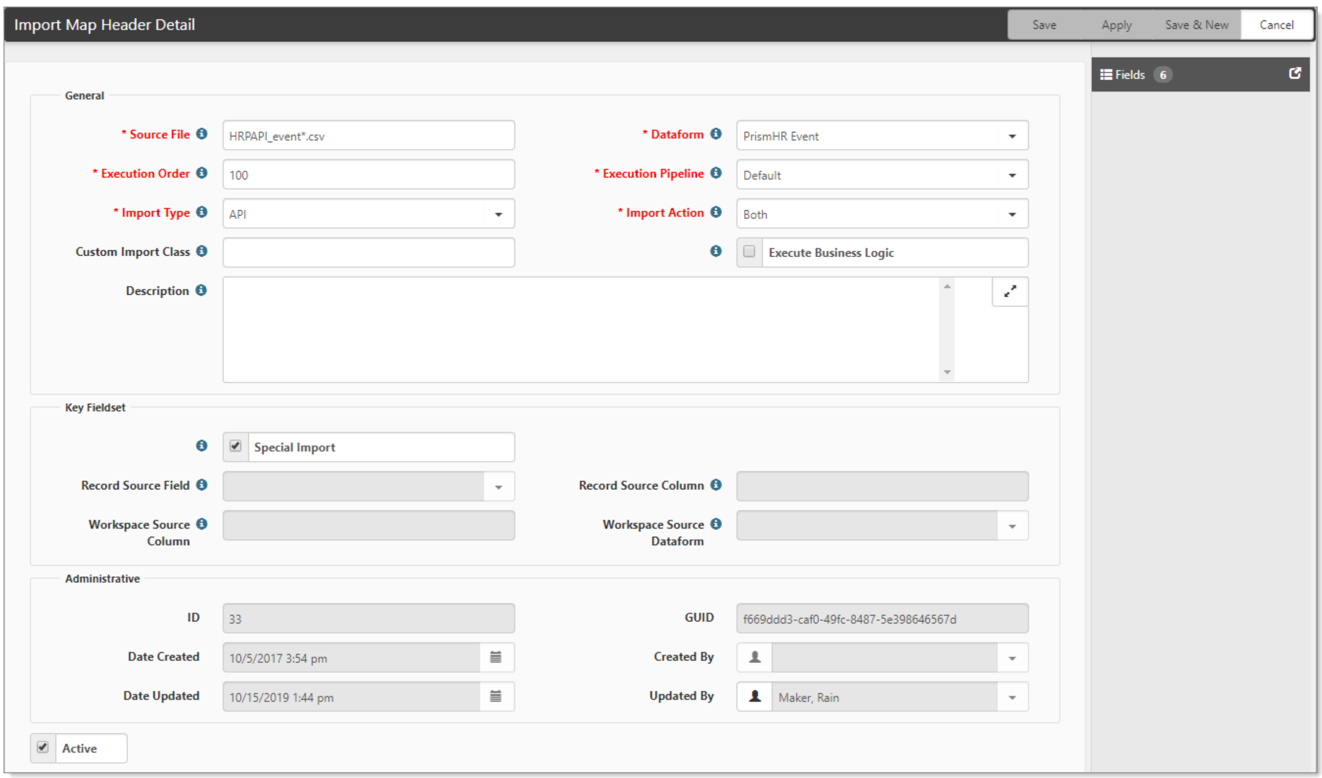
PrismHR User Status	ClientSpace User Status	After Import ClientSpace User
Inactive	Inactive	Inactive
Excluded	Not Imported	Not Imported

PrismHR event monitoring

ClientSpace watches for data changes in PrismHR and imports a selected set of data related to those changes. ClientSpace does this by monitoring the event queue, noting events that show changed data that is also mapped in an Import Map Header record. Changed data that is mapped then triggers system logic.

Import Map Header Detail

The Import Map Header Detail form defines the import event.

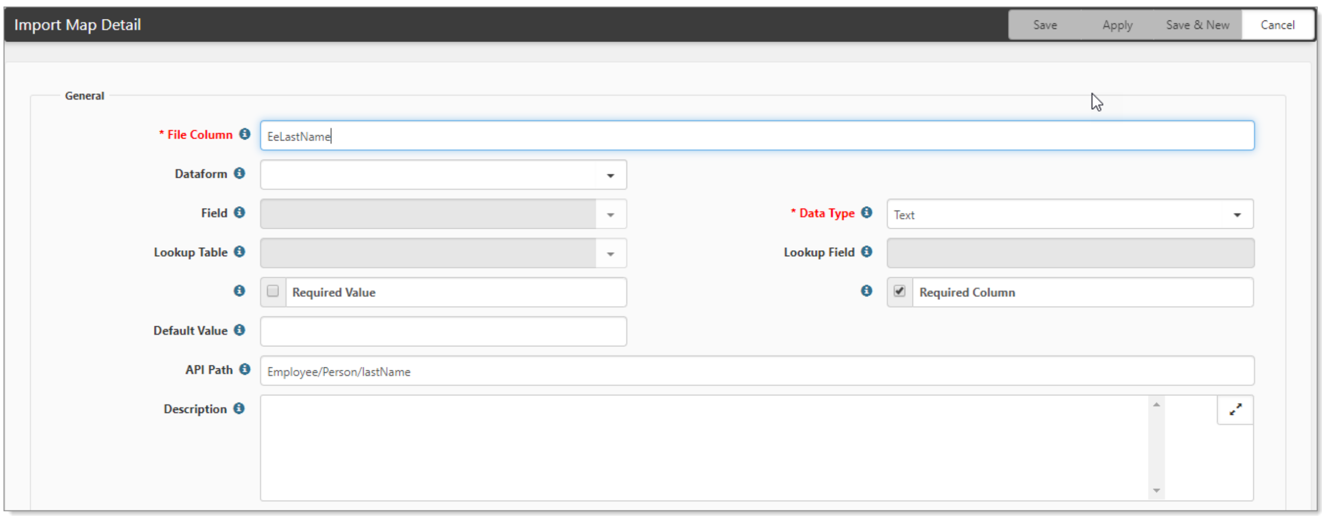


Field	Description
Source File	HRPAPI_event*.csv
Dataform	PrismHR Event

Field	Description
Execution Order	100
Execution Pipeline	Default
Import Type	API
Special Import	True (selected)

Import Map Detail

The Import Map Detail form manages the settings for the imported fields.



Field	Description
File Column	This name has no spaces.
Data Type	Text (always)
API Path	Schema/Class/field

API Configuration

- Same as a typical PrismHR API Configuration (can use existing)
- Users only the **KeepLeadingZeros=0/1** parameter for Client Numbers

PrismHR Subscription forms

- New Type field, Standard, or Event
- Existing Subscriptions must be set to Standard (run attached Script to update)

- This process uses Type Event

Process overview

- Retrieve the Event type Subscription
- Retrieve all Import Map Details with header source file = 'HRPAPI_event*.csv'
- Retrieve all Events from PrismHR for the Subscription
- Resolve each Event into a list of
  - Schema (the type of change, such as Employee)
  - Class (the category of change, such as Person or Direct Deposit
  - Client Number
  - Object ID (typically the Employee ID)
  - Modified Attributes (which fields changed for this Event)
  - If an Event contains a Modified Attribute that is not in the Import Map it will be added to the Excludes list on the Subscription
- For each resolved Event
  - Populate a new PrismHR Event dataform with the resolved Event data
  - Locate the workspace for the Client Number (from CM.ClientNumber)
  - if found, save the PrismHR Event dataform in that workspace
  - if not found, save the PrismHR Event dataform in the Admin workspace
  - Save using the PrismHREvent Pipeline - Any business rules triggered by this will also need to be set to execute on the PrismHREvent Pipeline.

ClientSpace data mapping for the PrismHR API

The PrismHR API provided enables ClientSpace to connect to the PrismHR system remotely and exchange data. The attached spreadsheet (see at the end of this topic) provides some insight into the field mappings and how they are used in ClientSpace.

Through the import process used by the API, the ClientSpace forms and fields are populated. Where you see PrismHR fields without a ClientSpace corollary, these are PrismHR API fields that are available, but not currently mapped in ClientSpace. We recommend reviewing the field mappings with Professional Services as the APIs continuously evolve. For assistance, please log an Extranet case.

Note: When some fields in ClientSpace are changed, the change can trigger business logic that can affect pricing in the system as well as other workflows. If you are not sure of the effect of adding a field to an import, before making any changes, please log an Extranet case.

Open the ClientSpace data mapping spreadsheet.

Implementing SSO from PrismHR to ClientSpace

The ClientSpace TSSO link in PrismHR enables you to seamlessly move from the Payroll application into ClientSpace without the need to log in. Making this magic happen, however, requires some advanced configuration. This topic describes the configuration and what to do if you encounter errors along the way.

- The process utilizes the PrismHR User's PeoID to inform ClientSpace which PrismHR Server to use to validate the connection.
- Because you can configure ClientSpace with multiple PrismHR servers, the API Configuration form for the appropriate PeoID is used for API service endpoints.
- Allows a logged-in PrismHR user to access ClientSpace without the need to log in to ClientSpace.

Note: PrismHR settings may require system administration rights. Additionally, this topic only describes the configuration portion of PrismHR related to ClientSpace. For help with this, refer to your PrismHR Administration documentation.

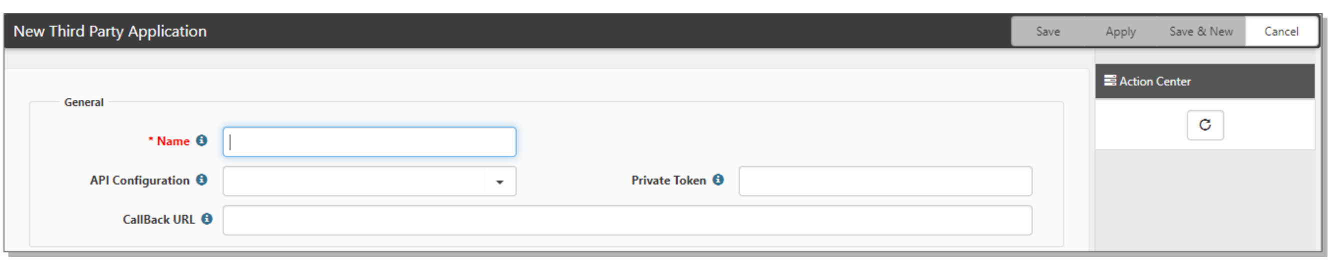
ClientSpace configuration: API Configuration form

The PrismHR API configuration form must have a Secondary ID (the PeoID) that matches the PrismHR User's PeoID. Locate the API configuration record by matching the PrismHR User's PeoID to the API Configuration Secondary ID.

- The Third Party LoginID must match the User ID of PrismHR user.
- The Third Party LoginID must be mapped to a valid ClientSpace User. This is the User that will be logged into ClientSpace
- Each PRismHR user that logs into ClientSpace using SSO will need one of these TPA user records.

To configure the Third Party Application (TPA):

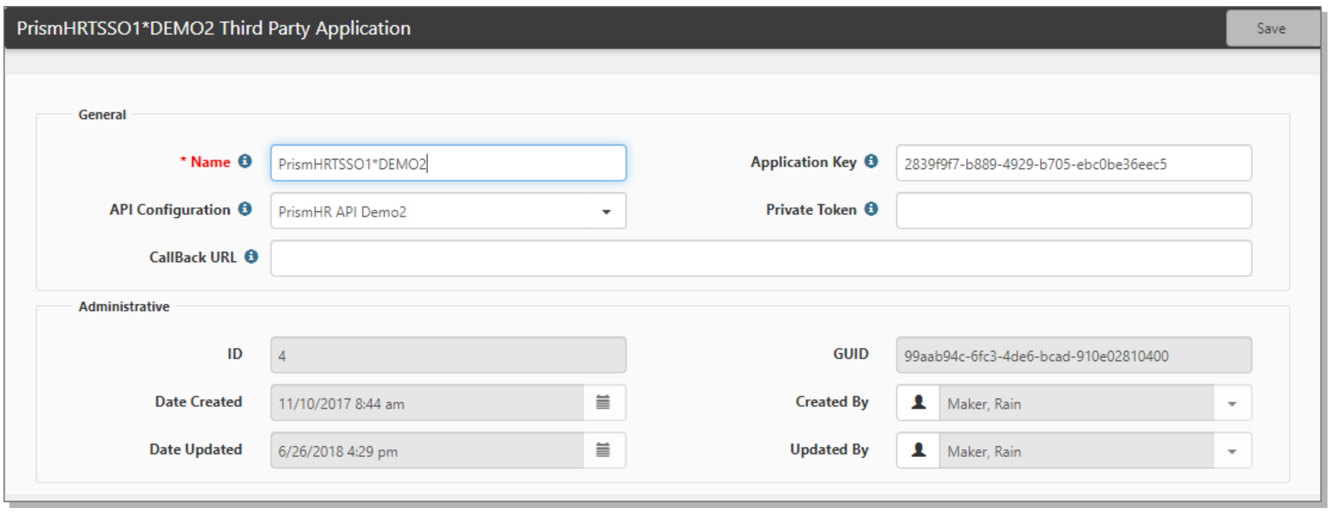
1. Go to **System Admin** > **Advanced** > **Third Party Applications**.
   The Third Party Application Configuration dashboard opens.
2. Click **Add**.
   The New Third Party Application form opens.



3. Complete the form:

Name	Type **PrismHRTSSO+*PeoID***, where the italics indicate the PeoID. There are NO spaces in this name. Example: `PrismHRTSSO1*DEMO` where `1*DEMO` is the PeoID. This allows multiple PrismHR Servers and Users to access ClientSpace.
API Configuration	You must select the appropriate PrismHR API configuration.

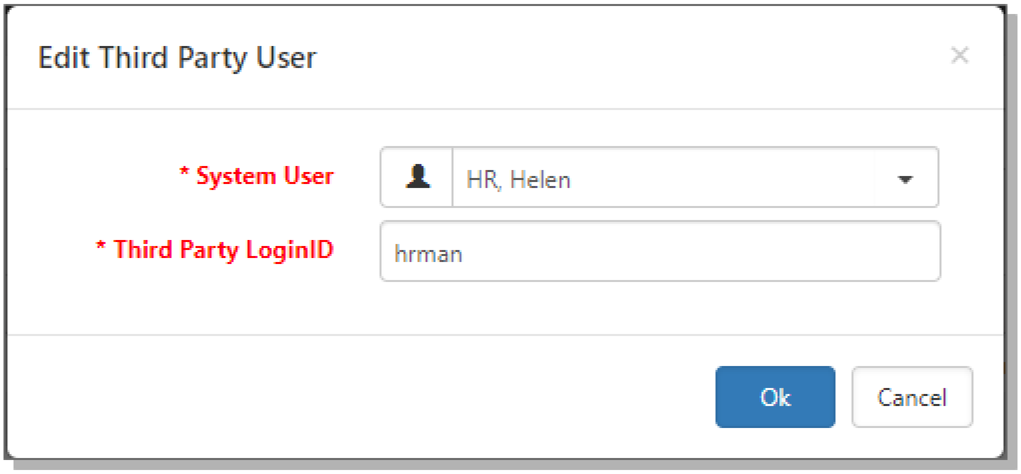
4. **Save** the record.
   This action generates the Application Key.



After the new Third Party Application entry has been saved, you need to add Third Party users. The users act as translation records, essentially mapping a PrismHR account to a matching ClientSpace account.

To add users to the Application:

1. Open the TPA record.
2. In the **Action Center**, select **Users**.
   The Third Party Application Users dashboard opens.
3. Locate a user and click (**Jump**).
   The Edit Third Party User form opens.

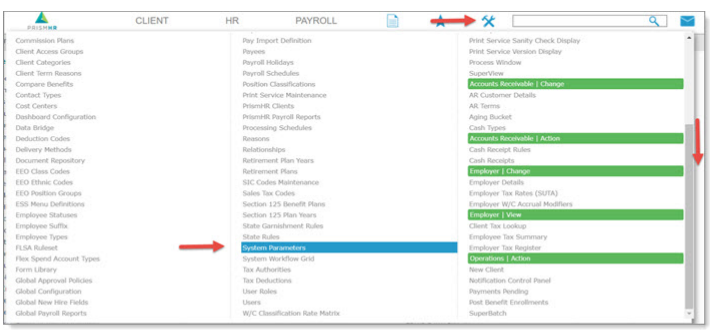


4. Click **Ok**.
   The user is added to the application.

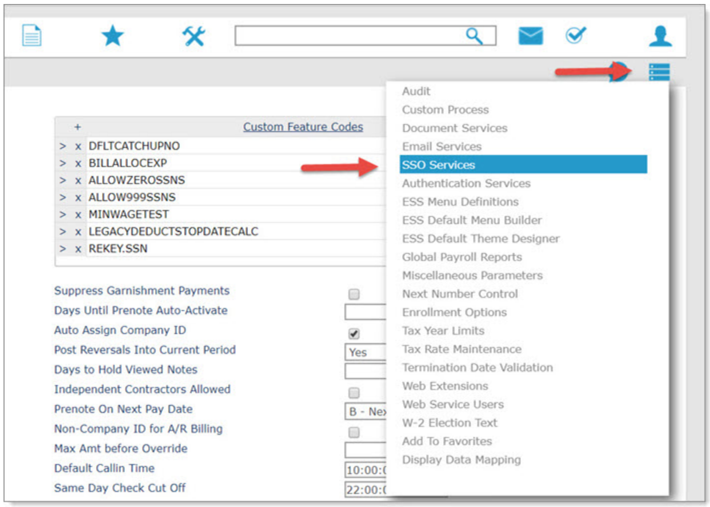
PrismHR Configuration

To specify the ClientSpace TSSO Url:

1. In PrismHR, select **Back Office System** > **Change, System Parameters**.



2. Select **Tool Menu** > **SSO Services**.



3. Select **Service Url:** `https://extranet.clientspace.net/Next/Netwise/PrismHR/SSO`
4. Additional PrismHR configuration is necessary. Consult with PrismHR for details (beyond the scope of this doc).

Operation overview

1. PrismHR User clicks the ClientSpace link (configured in PrismHR).
2. PrismHR sends the PrismHR User's PeoID and a secret token to the SSO Services Service Url that has been configured on the PrismHR server.
3. ClientSpace locates an API Configuration record matching that PeoID.

- If not found, display message "`Unable to validate User in ClientSpace for PeoID 'x'. Please contact your ClientSpace Administrator.`"

4. ClientSpace attempts to connect to the API using the credentials on the API Configuration record.
   - If unable to connect, display message "`Unable to connect to PrismHR for validation. Please contact your ClientSpace Administrator.`"
   - If able to connect but no session returned from PrismHR, display message "`Unable to obtain a valid Session from PrismHR. Please contact your ClientSpace Administrator.`"
5. ClientSpace sends the secret token back to PrismHR for validation.
   - If a validation response if not returned, display message "`Unable to validate this User's Authentication Key, no response from PrismHR. Please contact the System Administrator of the system from which you are trying to log in.`"
   - If validation is refused, display message "`Unable to validate User in PrismHR, Error = 'error info'. Please contact your ClientSpace Administrator and report this error.`"

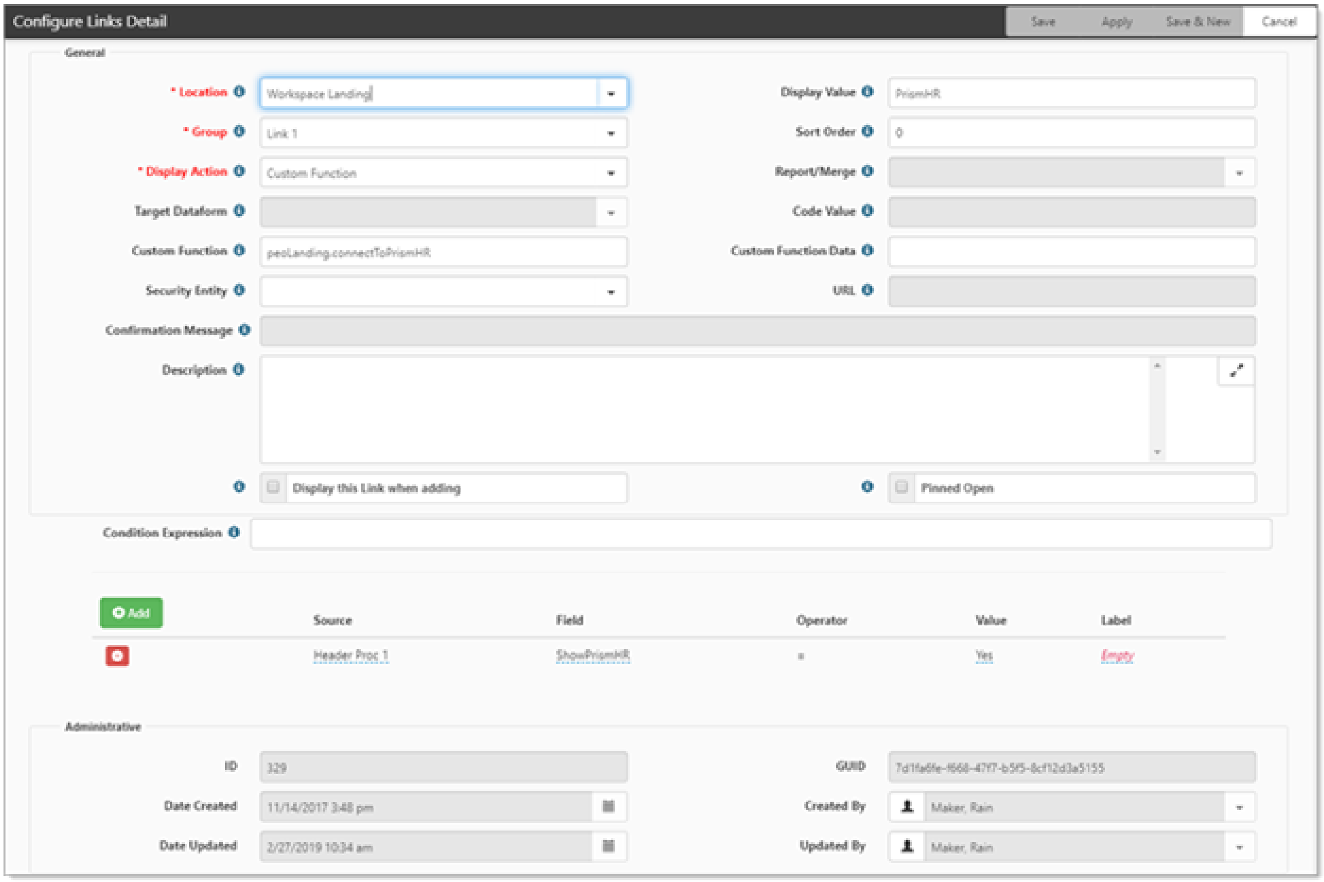
6. If PrismHR validates the secret key, it returns the PrismHR User information to ClientSpace.
7. ClientSpace attempts to locate the Third Party Application by name PrismHRTSSO + PeoId and the PrismHR User ID.
   - If unable to locate a TPA record for that user, display the message `"This User or your Server is not configured for Single Sign On in ClientSpace. Please contact your ClientSpace Administrator."`
   - f the TPA User is located, the ClientSpace User associated with that PrismHR UserID is logged into ClientSpace.
   - If login is unsuccessful, display message `"Unable to log in to ClientSpace. Please contact your ClientSpace Administrator."`
8. When logged in, the ClientSpace User is redirected to the ClientSpace home page (honors the Default to Next User setting).

ClientSpace to PrismHR

You can configure SSO connectivity to PrismHR using a custom link.

To configure a custom link:

1. Go to **System Admin** ⚙ > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Locate and open **Workspace Landing** for PrismHR. Or click **Add** to add the configuration.
   The Configuration Links Detail form opens.



3. Complete the form fields.
   This is available on PEO Landing Pages (Workspace Landing) and Client Service Case Forms.

Location	Select **Workspace Landing** or **Client Service Case**.
Group	Select **Link 1** or **Link 2**.
Display Value	Type **Connect To PrismHR**.
Display Action	Select **Custom Function**.
Custom Function	Type one of the following: • **peoLanding.connectToPrismHR** (Client Master) • **clientServiceCase.connectToPrismHR** (Client Service Case)
Display Conditions	• **Source**: Header Proc 1 • Trigger **Field**: ShowPrismHR • Trigger **Value**: True

4. Click **Save**.

PrismHR to ClientSpace Client sync

The PrismHR API import functionality enables initial and ongoing data imports from PrismHR to ClientSpace. The import process uses the following:

- Scheduled process **HRPImportInitialSync**.
- On the **Client Master**, the field **Sync with PrismHR (Import)**. You must enable the option (select) to import the data.
- API Configuration > Additional Parameters: **ExcludeCompanyFromSync=0**: The Company Initial import map IS included in the Sync if the map is active.
- **company_initial import map**

For questions about this import configuration, log an Extranet case.

When the scheduled process runs, it:

- Locates any Client with **Sync with PrismHR** selected (and a Client Number is present on the Client Master).
- For each Client, executes the INITIAL imports for all active INITIAL import maps.
- When completed, the system clears the **Sync with PrismHR** option and saves the Client Master using biz logic (HRP pipeline), Biz Logic only.

Why use?

The **Sync with PrismHR (Import)** option is great for cleaning up any one-off clients that failed to import due to errors during the initial import.

Exporting from ClientSpace to PrismHR

The following topics discuss the importing data from PrismHR to ClientSpace.

Exporting to PrismHR

The Export to Prism functionality creates client shells in Prism so that users do not need to enter data manually. This chapter describes the process of using the Prism API to export ClientSpace information into Prism. There are several Prism-specific activities outside the scope of this help topic that must take place to ensure the export process will be successful.

Configuring ClientSpace

Before you can begin the export process, you must configure ClientSpace to include Third Party Applications, API account information, Prism Subscription dataforms, custom links, business rules, ImportIDs for Lookups, and the Prism site.

API Implementation: Exporting data

The Export functionality has an on-demand capability for real-time data management for Clients and Employees between PrismHR and ClientSpace. Exporting data to PrismHR only functions in the on-demand mode.

> **MANDATORY**: You must configure ClientSpace before executing ANY of the Export functions.

Exporting data from ClientSpace into Prism consists of:

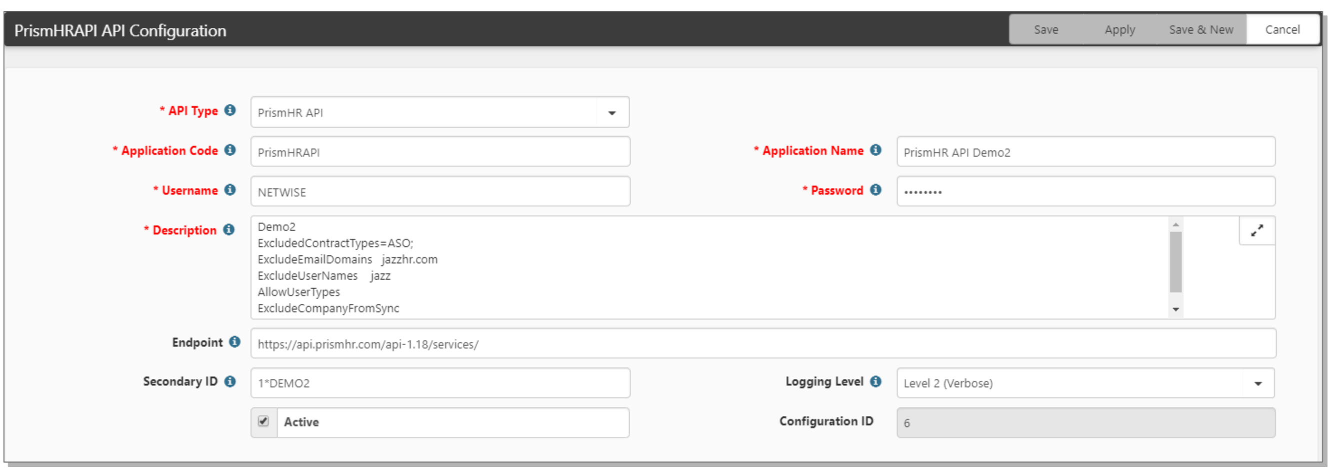
- Packaging ClientSpace Company and Employee data.
- Issuing that data to Prism to create basic Company and Employee objects in Prism.

Configuring the API account information

The API Configuration contains the information to connect to the specific PrismHR installation for the client.

To configure the API:

1. Go to **System Admin** > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. Click **Add**.
   The New API Configuration form opens.



3. Complete the form.

API Type	Select **PrismHR API**.

Application Code	Select **PrismHRAPI** as the Primary PrismHR server. There can be multiple instances of this API configuration type for multiple PrismHR servers. Name them *PrismHRAPIx*. The scheduled process will iterate through every API Configuration where Application Code starts with `PrismHRAPI%`.
Application Name	Type a description. This name is displayed in the ClientSpace lists. Use **PrismHR API**.
UserName	This is the username registered with PrismHR.
Password	Provide the password associated with the account username.
Description	Provide a brief description of the API.
Endpoint	Type a formatted URL that points to PrismHR, such as `https://api.prismhr.com/api-1.18/services/`. Must include the trailing **/** character.
Secondary ID	An identifier used to enable the monitoring of all Prism Clients at an installation.
Logging Level	Select a logging level: • **Level 0 (None)**: No log data is produced. • **Level 1 (Errors):** Only errors are logged to the Scheduled Process History Table. • **Level 2 (Verbose)**: All log data is stored in the Scheduled Process History Table. This includes entry/status/exit entries for every Prism API call and ClientSpace action (up to the Import Phase). Errors and Information entries are created.
Active	When this option is selected, the configuration is active (enabled).

4. Click **Save**.

Configuring Client Master and Employee custom links

To trigger business rules (to validate and export data to PrismHR):

1. Go to **System Admin** ⚙ > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Locate the **Client Master** records. If none exist, then click **Add**.
   See Configuring links for more detail on completing the form.

	Client Master	Export Client to PrismHR	Action	Submit w/Action	210
	Client Master	Export Employees to PrismHR	Action	Submit w/Action	220

3. To edit each Client Master record, select and click **Edit**.
   The Configure Links Detail form opens.
4. For the record **Export Client to PrismHR** (exporting the Client to PrismHR), configure the link as follows:

Location	Select **Client Master**.
Display Value	Type **Export Client to PrismHR**.
Code Value	Type **ExportClient**.

5. Click **Save**.
6. For the record **Export Employees to PrismHR** (exporting all Employees for a Client to PrismHR), configure the link as follows:

Location	Select **Client Master**.
Display Value	Type **Export Employees to PrismHR**.
Code Value	Type **ExportEmployees**.

7. Click **Save**.
8. For the record **Export Employee to PrismHR** (exporting a single Employee to PrismHR), configure the link as follows:

	Employee	Export Employee to PrismHR	Action	Custom Function	20

Location	Select **Employee**.
Display Value	Type **Export Employee to PrismHR**.
Code Value	Type **EEExport**.

9. Click **Save**.

Configuring Client Master and Employee business rules

To configure the Client Master and Employee Business Rules:

1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. For each of the following entries, locate and then select **Edit**.

	Client Master	gen_ClientMaster	HE_ValidateExportClient	HE_ValidateExportClient	Hard Error	100
	Client Master	gen_ClientMaster	HE_ValidateExportEmployees	HE_ValidateExportEmployees	Hard Error	100

	Client Master	gen_ClientMaster	ExportClientToHRP	ExportClientToHRP	Biz Logic	100

	Client Master	gen_ClientMaster	ExportEmployeesToHRP	ExportEmployeesToHRP	Biz Logic	100

3. To Export Clients, activate the following rules:
   - Dataform **Client Master**, Method Name **HE_ValidateExportClient**
   - Dataform **Client Master**, Method Name **ExportClientToHRP**
4. To export all Employees, activate the following rules:
   - Dataform **Client Master**, Method Name **HE_ValidateExportEmployees**
   - Dataform **Employee**, Method Name **ExportEmployeesToHRP**
5. To export a single Employee, activate the following rules:
   - Dataform **Employee**, Method Name **HE_ValidateQueueEmployee**
6. Click **Save**.

Available data

There are several required fields on the Client Master (and related forms) and Employee (and related forms) dataform. In the following table, fields with an asterisk * indicate that the Export expects to locate, in particular, Import IDs on several users, and lookups. Other fields are available, but not required.

Data	Description
Client Export	• Org Name (ClientName) * • ORG.AKA (LegalName) • Org County * • Org Address1 * • Org City * • Org State (StateCode) * • Org PostalCode (ZipCode) * • CM Contract Type ImportID * • CM Corporation Type ImportID * • CM Contract Status ImportID * • CM Contract Status ImportID (must be either A, T, I or P) * • CM Status Date – translated to cmClientEntry.statusDate * • CM.ContractEffectiveDate – translated to cmClientEntry.contractDate (only if populated) • H (DeliverChecks) • ORG.Address2 • ORG.crBusinessType (CategoryCode) • ORG.Phone (Telephone) • ORG.Fax • ORG.Email • ORG.EmployerIDNumber (EIN) • ALE ImportID (ALE on the CM) * • Processing Team Payroll Specialist User - ImportID (Payroll REP id in Prism) * • Processing Team Sales Rep User - ImportID (SalesRep id in Prism)* • Processing Team HR Consultant – ImportID (HRRep id in Prism) * • Org Phone must be (xxx) xxx-xxxx *

<table>
<tr><th>Data</th><th>Description</th></tr>
<tr><td>Employee Export</td><td>

EE.FirstName *
EE.LastName *
EE.DOB *
EE.Address1 *
EE.ZipCode *
EE.City *
EE.State (2 character) *
EE.SSN *
EEI.crEmploymentStatus.ImportID: *

Terminated = T
Otherwise, Active = A

EEI.crEmploymentType.ImportID:

Part Time = PT
Otherwise, Full Time, FT

CL.LocationCode (Work location code, must match Prism value) *
EEI.JobCode (must match Prism job code for this client) *
EEI.OriginalHireDate *
EEI.HireDate *
EEI.StartDate *
EEI.luPayMethod.ImportID: *

Salary = S
Hourly = H
Driver = D
Commission = C

EEI.HourlyRate (min 1)
EEI.StandardHoursPerPeriod *
EE.crMaritalStatus.ImportID: *

Married = M
Single = S
Divorced = D

</td></tr>
</table>

Data	Description
	- EEI.HRPPayGroup (must match Prism pay group for this client) * - EEI.luPayFrequency.ImportID: * - Weekly = W - Bi-Weekly 1 = B - Bi-Weekly 2 = B - Monthly = M - Semi-Monthly = S - Yearly = Y - Otherwise, Hourly = H - EE.crGender.ImportID: * - Male = M - Female = F - EE.crEthnicClassification.ImportID: * - Caucasian = W - Asian = A - Native American = N - Hispanic = H - Black = B - Unknown = X - EE.luWorkStateFilingStatus.ImportID (if required) * - EE.luHomeStateFIlingStatus.ImportID (if required) - EE.WorkStateTaxExemptAmt (if required) * - EE.HomeStateTaxExemptAmt (if required) - EE.WorkStatePrimaryAllowance (if required) - EE.HomeStatePrimaryAllowance (if required) - EE.HomeStateSecondaryAllowance (if required)

ImportIDs

Certain Lookups and other data require translation to Prism values. This is done using ImportIDs on the following data:

- CM.Contract Type
- CM.Contract Status
- HR Rep User
- Sales Rep User
- EE.Employment Status
- EE.Employment Type
- EE.Marital Status
- EE.Gender
- EE.Ethnic Classification
- EE.Work State Filing Status
- EE.Home State Filing Status
- EEI.Pay Method
- EEI.Pay Frequency

Prism site parameters

Before using the API, you must configure the Prism site with the following parameters.

Parameter	
Valid User account	• Username (case sensitive) • Password (case sensitive) • PEO ID (case sensitive) • HRP API URL. The endpoint of the WSDL on the server to be used
The Account must be Enabled	

Parameter	

Prism requires the following for each Client:	• Business Entity Type (Example: LLC, S Corp, etc.) (Client Details)
	• Payroll Check Account (Account)
	• Garnishments Check Account (Account)
	• Receipts Account (Account)
	• Processing Schedule (Control)
	• GL Template (Control)
	• Bill Format (Billing)
	• Billing Template (Billing)
	• Delivery Method (Payroll)
	• Pay Groups (Payroll)
	  ◦ Pay Group
	  ◦ Description
	  ◦ Pay Schedule
	  ◦ Pay Date

Job Codes (Positions)	

Exporting to PrismHR

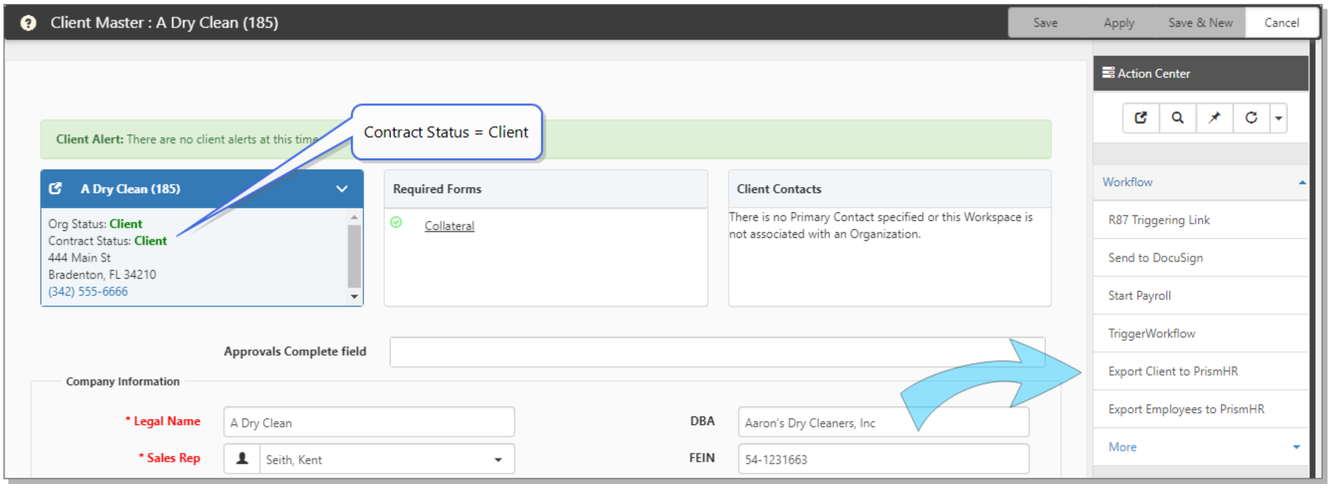
Clients and Employees can be exported from ClientSpace to Prism. The export is performed on-demand using Client Master and Employee header links and business rules. The Client Master must be exported first to create a container in Prism in which to collect the Employees. This process consists of gathering Prism required information in ClientSpace and (automatically) creating that Client in Prism. After the Client passes the required data validation, it is flagged as ready for Export.

A set of ClientMaster Header links facilitate the Export of Client and Employees. When successful, Prism provides a Client Number that is inserted on the Client Master for that Client. At this point, there may be additional Prism configuration requirements before the Client is fully configured and ready to accept employees. After the Prism Client is completely configured in Prism, ClientSpace Employees can then be exported.

When properly configured, ClientSpace reports any missing data fields, including ImportID information where required. When creating (exporting) a Client from ClientSpace to PrismHR, all active Contacts associated with the Org that is related to the Workspace are created in PrismHR. Additionally, the export process updates the Contact ImportID with ClientNumber-PrismHRContactID.

Exporting Clients and Employees on-demand from the Client Master

Two links are available for on-demand exporting. The **Export Client to PrismHR** link creates a Client entry in Prism. If successful, a subsequent link **Export Employees to PrismHR** appears. The following screenshot shows the links in the Action Center.



Exporting Clients

The **Export Client to PrismHR** process creates a ClientSpace Client entry in Prism. Prism returns a Client Number, which is then stored on the ClientSpace Client Master for the respective Client. Although the Export Client to PrismHR process delivers much of the necessary Prism data, it does not mean that the Client will be fully configured in Prism. You may have to manually configure additional fields in Prism before this Client is ready to accept Employees.

Two business rules prepare a ClientSpace Client for export: **ClientMaster.HE_ValidateExportClient** and **ClientMaster.ExportClientToHRP**.

To export Clients:

1. In the **Action Center**, click the link **Export Client to PrismHR**.
   This action executes the validation rule **HE_ValidateExportClient** and the Business Rule **ExportClientToHRP** with a Header Action of ExportClient.
2. A check is made for fields that are required by Prism to create a Client entry successfully:

■ Org Name	■ Org AKA
■ ImportID	■ Org DBA

■ Org County	■ Org Address1
■ Org Address2	■ Org City
■ Org State	■ Org Postal Code
■ CM Contract Type	■ CM Status
■ CM Status Date	■ Org Business Type
■ Org Phone	■ Org Fax
■ Org Email	■ CM Contract Effective Date
■ Org Employer ID Number	■ Admin
■ Legal Entity	■ Processing Team Payroll Specialist
■ User ID	■ Import ID

3. For missing fields: A Hard Error is thrown indicating the missing fields. The business rule does not execute. The Export Status is set to Failed Validation.
4. If the Hard Error check passes, this rule sets the Client Master luExportStatus field to Ready and clears the Export Log field.
5. The Business Rule does the following:
   - Packages the Client data.
   - Issues the data to Prism to create a Client.
   - If the Export fails:
     - NO MESSAGES ARE ISSUED! You must review the Export Status and Export Log fields for results.
     - The Export Status field is set to Failed API, and the Export Log field contains the cause of the failure. Some of the errors may be ClientSpace related, and some may be Prism related. Saved via Business Logic, HRP pipeline.
     - At this point, correct the errors before proceeding.
   - If the Export passes, the Export Status field is set to Client Export Complete. The Client Number is populated with the value provided by Prism. Saved via Business Logic, HRP pipeline.
6. Complete the Client in Prism.

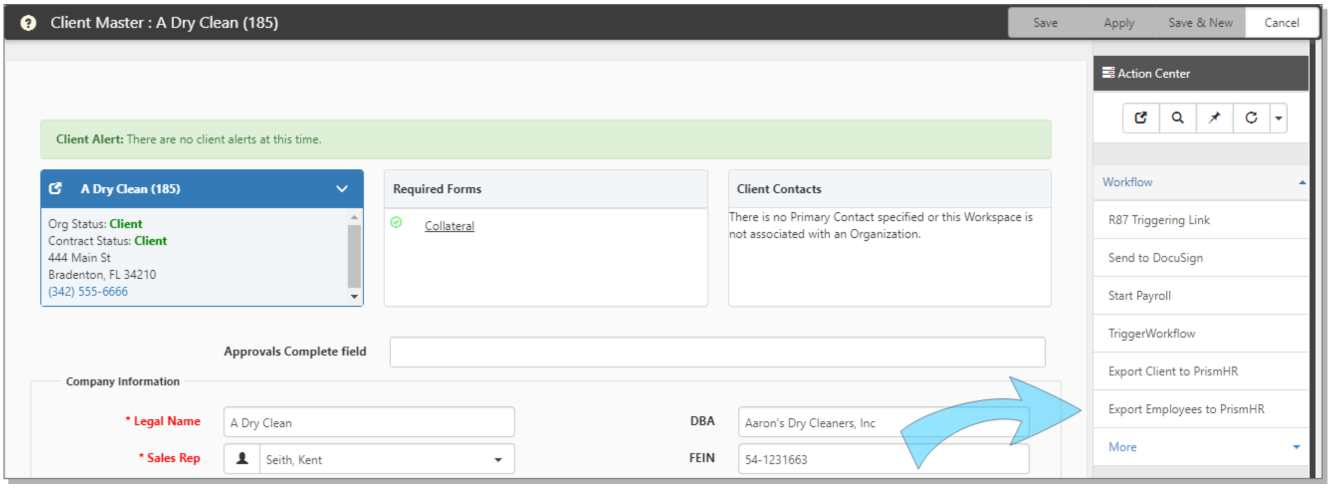
To view fields that can exported from ClientSpace to Prism:

Open the ClientSpace-PrismAPI Data Mapping spreadsheet.

Exporting Employees

The **Export Employees to PrismHR** process creates a ClientSpace Employee entry in Prism. Prism returns an Employee Identifier that is then stored on the ClientSpace Employee record for the respective Client/Employee. Prism will NOT allow Employees to be added to Clients that are not properly configured or have incomplete data. You must verify that the Client is properly configured AND manually set the Export Status on the Client Master.

The business rule **ClientMaster.HE_ValidateExportEmployees** prepares ClientSpace Employees for export on the Client Master. A Client Master link **Export Employees to PrismHR** is displayed when the ClientMaster luExportStatus field is empty or set to Client Setup Complete.



Exporting all Employees

To export Employees:

1. When the Client Master has a Client Number, the link **Export Employees to PrismHR** becomes available.
2. Click the link **Export Employees to PrismHR**.
   This action validates required information for each Employee (HE_ValidateExportEmployees). If any Employee fails, that Employee record is updated with a list of missing data. All Employees must pass validation before proceeding. Saved via Business Logic, HRP pipeline.
3. A list of Employees (or an individual employee) ready for export is retrieved. That list includes any Employees that meet the following criteria:
   - CM.luExportStatus field = Client Setup Complete
   - CM.ClientNumber field is not empty

- The Employee Identifier field is empty
- The Employee IsActive is True

4. For each Employee in the list:
   - The Client Number associated with the Employee is retrieved.
   - The following ClientSpace fields are sent. An asterisk * indicates a required field.

EmployeeID	
ProjectID	
FirstName *	
LastName *	
BirthDate	BirthDate is validated.
EmployerID	
Address1	
ZipCode	
City	
StateCode	
SSN *	
EmployeeStatusCode *	
EmployeeTypeCode	
WorkLocationCode *	
JobCode *	
OrigHireDate *	
LastHireDate *	
PEOStartDate *	
PayMethod	
PayRate	
StandardHours *	

FedFileStatus	
PayGroup *	
BenefitsGroup	
AutoPay	
PayPeriod	
Gender	
EthnicCode	

The following fields are sometimes sent depending on the employee's work state:

WorkStateFilingStatus
HomeStateFilingStatus
WorkStateExemptAmt
HomeStateExemptAmt
WorkStatePrimaryAllowance
HomeStatePrimaryAllowance
HomeStateSecondaryAllowance

5. Continue to build a set of Employees to be imported to Prism.
6. The set of Employees is then staged in Prism (importEmployees()). An HRP object is returned after this call. That object is evaluated:
   - If the HRP object Error is set to ‘pass’ meaning the employees were staged properly, the HRP object import error node is evaluated. If that node is empty, the Employees staging was successful and has passed validation. If an error is pending, the Employees that did not pass validation is not exported (a log entry is generated).
   - For the Employees that were properly staged, the set is now committed (commitEmployees()).
   - After committing, the Employees are updated in ClientSpace: Each Employee’s Identifier is set.

7. If the validation passes, the rule **ExportEmployeesToHRP** executes.
   - This rule packages the Employee and Employment data for each Employee of the current Client.
   - Issues the data, one Employee at a time, to Prism requesting that an Employee be imported and committed.
8. If the Export fails:
   - NO MESSAGES ARE ISSUED TO THE USER! The User must review the Export Status and Export Log fields for results.
   - The Export Status field is set to Failed API, and the Export Log field will contain the cause of the failure. Some of the errors will be ClientSpace related, and some may be Prism related.
   - At this point, correct the errors before proceeding.
9. After the Export passes:
   - The Export Status field is set to Employee Setup Pending. The Employee may have further configuration requirements in Prism. Saved via Business Logic, Default pipeline.
   - The Employee Identifier is populated by the value provided by Prism. Saved via Business Logic, Default pipeline.

Exporting single Employees

The Action Center link, **Export Employee to PrismHR** appears only if the EmployeeIdentifier field is empty and the Client Master status is UnderContract, PendingActivation, or PendingTermination.

1. From the **Employee** record, in the **Action Center**, click **Export Employee to PrismHR**.
2. Review the steps in the previous procedure, exporting all Employees.

Salesforce

The Salesforce API is a PEO process that maintains data synchronization between a client's ClientSpace installation and their respective Salesforce system.

During the life cycle of a Deal, either Salesforce or ClientSpace is responsible for the data. Typically, when in the Lead Discovery cycle, Salesforce owns the data. As changes are made in Salesforce, ClientSpace is updated with those changes. When the Deal has reached a certain level, ClientSpace no longer accepts changes from Salesforce but keeps Salesforce up to date with certain data as changes are made in ClientSpace.

Although this is a PEO process, custom fields in both ClientSpace and Salesforce can be imported. The exchange of data between the systems is highly configurable. Data elements are mapped at the field level for each system using standard ClientSpace Import Map Headers and Details.

When ClientSpace dataforms (**gen_**) are updated from Salesforce, they are saved using Dataform Pipeline Logic, when executes business rules and triggers email templates.

Salesforce API overview

ClientSpace provides a customizable Salesforce integration through the Salesforce API, enabling you to connect standard (as well as custom) Salesforce fields to ClientSpace. This basically creates a synchronization that keeps your Salesforce and ClientSpace data on the same page automatically. Customizable triggering fields can be set to only sync up the data when it fits your business need.

This topic provides an overview of the functionality. Any Salesforce API implementation would be customized for you by PrismHR. If you have specific questions about the Salesforce API or would like to work with us to create a custom Salesforce integration, log an Extranet case.

The following table presents a typical Salesforce API integration, which data is synchronized, and when that occurs would be customized by PrismHR to suit your business needs.

Salesforce		**ClientSpace**	
Technical Field Name	**Salesforce API Path object**	**Field Label**	**Field Name**
		Organization	
sfAcct.Name	Account/	Name	Name
sfAcct.Owner	Account/	Assigned To	flUserIDOwner
sfAcct.Phone	Account/	Phone	Phone
sfAcct.Fax	Account/	Fax	Fax
sfAcct.Website	Account/	Website	Website
sfOpptyty.LeadSource	Opportunities/	Source	crSource
sfAcct.Industry	Account/	Business Type	crBusinessType
sfAcct.BillingStreet	Account/	Address1, Address2	Address1
sfAcct.BillingStreet	Account/	Address2	Address2
sfAcct.BillingCity	Account/	City	City
SfAcct.BillingState	Account/	State	State
sfAcct.BillingPostalCode	Account/	Postal Code	PostalCode
sfAcct.BillingCountry	Account/	Country	Country
sfAccountID	Account/	ImportID	ImportID

Salesforce		**ClientSpace**	
		Org Other Info	
sfOppty.CloseDate	Opportunities/	Expected Close Date	ExpectedCloseDate
sfOppty.Type	Opportunities/		
sfOppty.Lead Source	Opportunities/		
sfOppty.Probability (%)	Opportunities/	Probability of Close	ProbabilityofClose
sfOppty.ID	Opportunities/		
		Contact	
sfContact.AccountId	Contacts/	Organization	fkOrganizationId
sfContact.Owner	Contacts/	Assigned To	fkAssignedToUserID
sfContact.FirstName	Contacts/	First	FirstName
sfContact.LastName	Contacts/	Last	LastName
sfContact.Title	Contacts/	Job Title	Title
sfContact.Phone + Ext	Contacts/	Business Phone	BusinessPhone
sfContact.Email	Contacts/	Primary Email	Email1
sfContact.MobilePhone	Contacts/	Mobile	CellPhone
sfContact.Fax	Contacts/	Fax	Fax
sfContact.MailingStreet	Contacts/	Address 1	Address1
sfContact.MailingCity	Contacts/	City	City
sfContact.MailingState	Contacts/	State	State
sfContact.MailingPostalCode	Contacts/	PostalCode	PostalCode
sfContact.MailingCountry	Contacts/	Country	Country
sfContactID	Contacts/	Import ID	ImportId
		Client Master	
		SIC Code	luAltIndustryCode
		Activation Date	StartDate
sfAcct.ParentId	Account/	Parent Company	fkParentCompanyID
		Kill Reason	luKillReason
sfOppty.Descriptions	Opportunities/	Description of Operations	DescriptionofOperations
sfOppty.StageName	Opportunities/	Status	Status
		gen_ClientTeam	
sfOppty.Owner	Opportunities/	Sales Respresentative	fkSalesRepUserID

The Salesforce API integration allows you to connect custom Salesforce fields (where the technical name ends in **_c**) to fields in ClientSpace, allowing you to implement an API unique to your business.

Prerequisites

This topic provides an overview for configuring the Salesforce API and includes step-by-step configuration information to help you get started using the API. Before you begin, the Client will need to create a case with SalesForce.com to request access to a sandbox environment. The client will need to provide:

- Salesforce Username
- Salesforce Password
- Salesforce Endpoint – the URL of the API for the partner WSDL
- Integration key used by this configuration
- The client must create a **Work_Queue__c** object. This object will be populated with records containing Opportunity IDs for Opportunities that are Imported into ClientSpace. The Client determines when a Work Queue record is created.

Salesforce API v2.0

This topic describes the integration of Salesforce into ClientSpace using v2.0 of the API. The API requires immense precision to configure both Salesforce and ClientSpace including Connectivity configuration and Import mapping. Misconfiguring any of these settings can produce unexpected results and problematic consequences, such as duplicate records. Before you attempt to configure the Salesforce API integration, it is highly recommended that you log an Extranet case.

Process overview

The Salesforce API Integration is a PEO process that maintains data synchronization between a Client's ClientSpace installation and their respective Salesforce system.

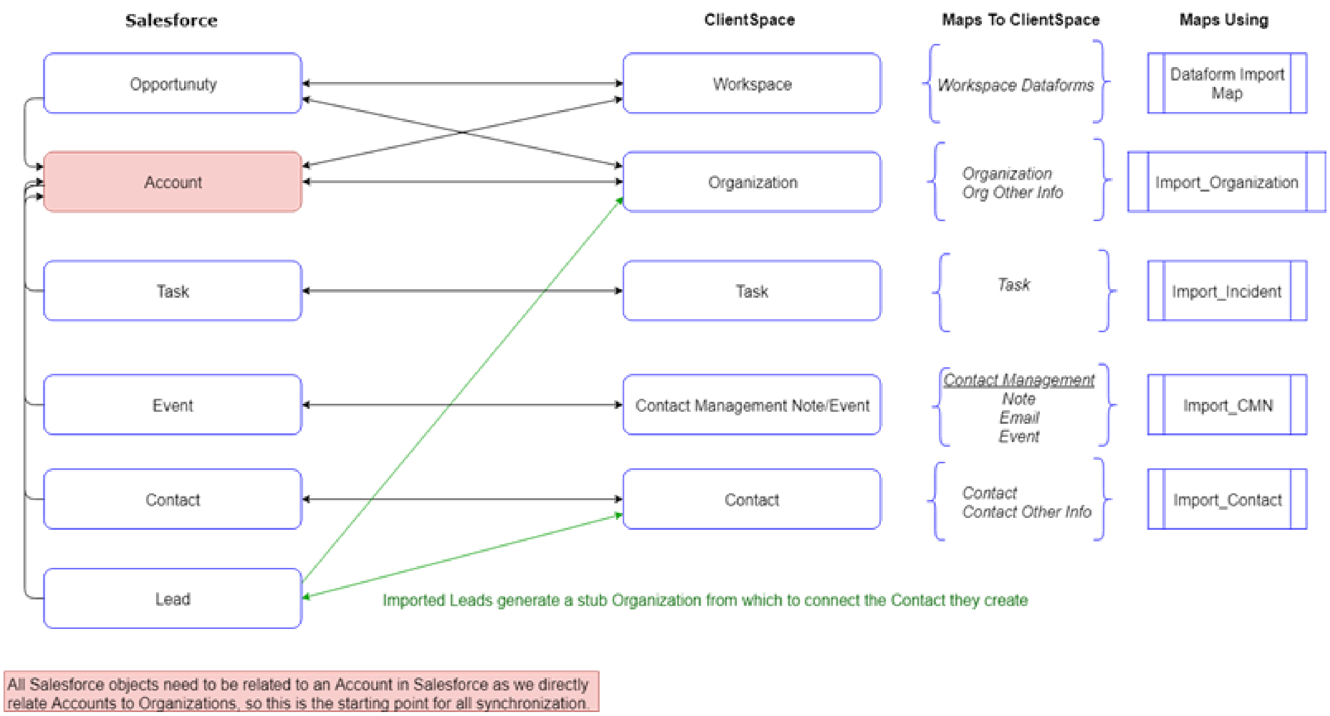
During the life cycle of a Deal, either Salesforce or ClientSpace is responsible for the data. Typically, when in the Lead Discovery cycle, Salesforce owns the data. As changes are made in Salesforce, ClientSpace is updated with those changes. When the Deal has reached a certain level, ClientSpace will no longer accept changes from Salesforce but will keep Salesforce up to date with certain data as changes are made in ClientSpace.

Although this is a PEO process, custom fields in both ClientSpace and Salesforce can be imported. Configuration handles the specific fields to be managed. The exchange of data between the systems is highly configurable. Data elements are mapped at the field level for each system using standard ClientSpace Import Map Headers and Details.

When ClientSpace dataforms (**gen_**) are updated from Salesforce, they are saved via Dataform Pipeline Logic, which then executes business rules and triggers email templates.

Data Relationships for Salesforce API v2.0

The following diagram shows the relationships between Salesforce and ClientSpace objects. Only one Opportunity can be mapped to ClientSpace per Organization, even though there can be multiple Opportunities associated with an Account. Use the Opportunity **RecordType.Name** to identify the correct Opportunity (see ClientSpace Configuration section).



Specifications

Exports to Salesforce affect the following Salesforce Objects:

- Opportunity (updates existing Opportunities in Salesforce and does not create new Opportunities).
- Account (updates existing Accounts in Salesforce, does not create new Accounts).
- Contact (updates existing Contacts or creates new Contacts under an Account).

During the export to Salesforce, the ClientSpace system selects the single Salesforce opportunity object that was most recently updated when exporting data using the API.

ClientSpace Tables are mapped to Salesforce:

- CS_Organization => SF_Opportunity => SF_Account

    - An Organization (or Org Other Info) change in ClientSpace will result in an Opportunity and an Account update in Salesforce
    - Only one Opportunity can be related to an Account. The Salesforce system may contain more than one Opportunity for the Account, but only one Opportunity can be updated. This is the Client's responsibility to manage
- CS_Client Master => SF_Opportunity => SF_Account
    - A ClientMaster change in ClientSpace will result in an Opportunity and an Account update in Salesforce
- CS_Contact => SF_Contact
    - A Contact (or Contact Other Info) change in ClientSpace will result in a Contact update in Salesforce

Imports from Salesforce affect the following ClientSpace tables and dataforms.

New Workspaces and records can be created by the process:

- tblOrganization
- gen_OrgOtherInfo
- gen_ClientMaster
- gen_ClientLocation
- tblContact
- gen_ContactOtherInfo
- any gen_ form (via configuration)
- Tasks
- Contact Management Notes

You can import Salesforce **Opportunities**, **Accounts**, **Lead**, **Event**, **Task**, and **Contacts** data into ClientSpace.

Salesforce objects are mapped to ClientSpace:

- SF_Opportunity=>_SF_Account=>SF_Contact to ClientSpace tables
- Opportunity (retrieved from Work Queue) and Account (retrieved from related Opportunity) and Contacts (related to the Account) map to the ClientSpace tables

Exporting data

Exports allowed

- A flag is used to determine whether or not ClientSpace will export data to Salesforce. This flag is set via the API Configuration form. It cannot be changed programmatically.

Organization

- Update Opportunity and/or Account based on mappings (Org and Org Other Info).

Client

Client Master data is combined with other workspace data using the PEO stored procedure **peo_ salesforce_org_s_workspace_by_org**.

Contact

- Update Contact based on mappings (Contact and Contact Other Info).
- Create new contact based on mappings (Contact and Contact Other Info).
- Create converts the Org Assigned To to a Salesforce User or Salesforce Account Owner.

To add Client Master Export fields:

1. Add a custom version of this stored procedure to your system that includes the additional fields.
   - update Opportunity and/or Account based on mappings (Client Master)
   - set Opportunity.StageName based on ClientMaster.Status
2. For questions or help with this, log an Extranet case.

Importing data

Updates Allowed

- An internal flag **_CSUpdateAllowed** is used to determine if Salesforce data is allowed to be imported into ClientSpace. This is a configurable setting that changes programmatically depending on the state of the Client Master Status.

Work Queue

- Object must be named **Work_Queue__c**
- Must contain **OpportunityID__c** and **Complete__c** fields
- **Complete__c** must be set to **false** when the record is created in Salesforce
- Duplicate Opportunities in multiple Work Queue records are ignored
- If the import is successful,
  - Work Queue **OpportunityID__c** is set to **Empty**
  - **Complete__c** is set to **true**

Organization

- Creates new Org or updates an existing Org

- General Notes marked Updated/Created from the SalesforceAPI
- Org ImportID is set to Salesforce Account ID
- Only updates existing Org data with Salesforce data if _CSUpdateAllowed
- Org is saved from the database, no biz logic executed

Org Other Info

- Creates new Org Other Info or updates existing Org Other Info
- All fields and values are retrieved from the current installation (custom fields are available)
- Only updates existing Org Other Info data with Salesforce data if _CSUpdateAllowed (or when creating a new record)
- Org Other Info is saved from the database, no biz logic executed

Client Master

- Creates new Client Master and workspace if associated Org has no workspace (must have client template configured for this to function)
  - Updates Client Team Sales Admin User after workspace is created (to Org Assigned To)
  - The new Client Master is saved using the dataform pipeline **Default**
- After the new Client Master is created (or Client Master exists)
  - **fkParentCompanyID** is set to Salesforce Account/ParentId associated CS Organization (if exists)
  - All fields and values are retrieved from the current installation (custom fields are available)
  - Adds Org Node for Biz Logic access (similar to a Client Master save from the UI)
  - Only updates existing Client Master data with Salesforce data if **_CSUpdateAllowed**
  - Updated Client Master is saved from the dataform pipeline **SalesforceAPI**
- **Client Location**
  - Creates new Client Location or updates existing Client Location
  - If new, sets LocationName("MAIN"), luLocationType("Main"), SyncToM("P"), SyncToB("P")
  - All fields and values are retrieved from the current installation (custom fields are available)
  - Only updates existing Client Location data with Salesforce data if _CSUpdateAllowed (or when creating a new record)
  - Client Location is saved from the dataform pipeline SalesforceAPI
- **Contacts**
  - Retrieves all Salesforce Contacts associated with Salesforce Account
  - Looks up each contact by ClientSpace ImportID

- Creates new Contact if ImportID not found
- Always set IsActive(True), SyncWithOrganizationAddress(false), ImportID(SF Contact ID)
- Ignores _CSUpdateAllowed (always syncs Salesforce data)
- Contact is saved from the database, no biz logic executed

- **Contact Other Info**
  - Updates or creates Contact Other Info for each Salesforce Contact (from Contacts above)
  - All fields and values are retrieved from the current installation (custom fields are available)
  - Ignores _**CSUpdateAllowed** (always syncs Salesforce data)
  - Contact Other Info is saved from the database, no biz logic executed
- **Other Dataforms**
  - Any Dataform mapped (Import Map Header) is included
  - Iterates through each mapped Dataform
  - Retrieves existing Dataform from Workspace associated with Salesforce Account (CS Organization)
  - Creates dataform if one does not exist in Workspace
  - Dataform is saved from the dataform pipeline **SalesforceAPI**
  - Only updates existing dataform data with Salesforce data if _**CSUpdateAllowed** (or when creating a new record)

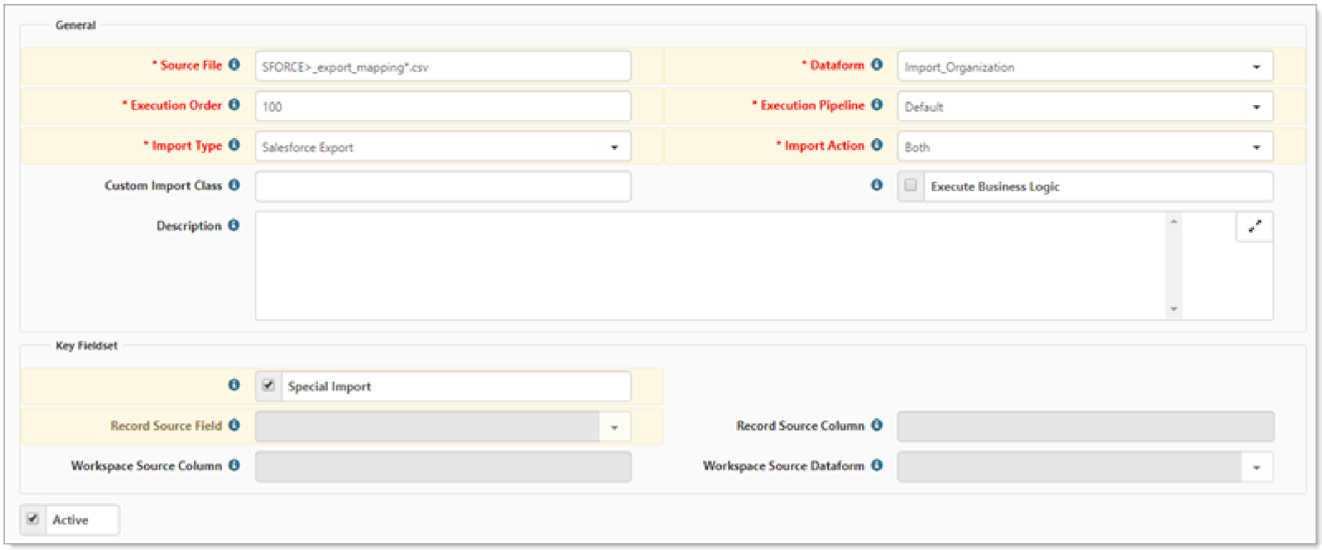
Import/ Export mapping

The mapping of data between ClientSpace and Salesforce is defined using Import Map Headers.

Two Import Maps must be created:

- Export Map Header
- Import Map Detail

Export Map Header



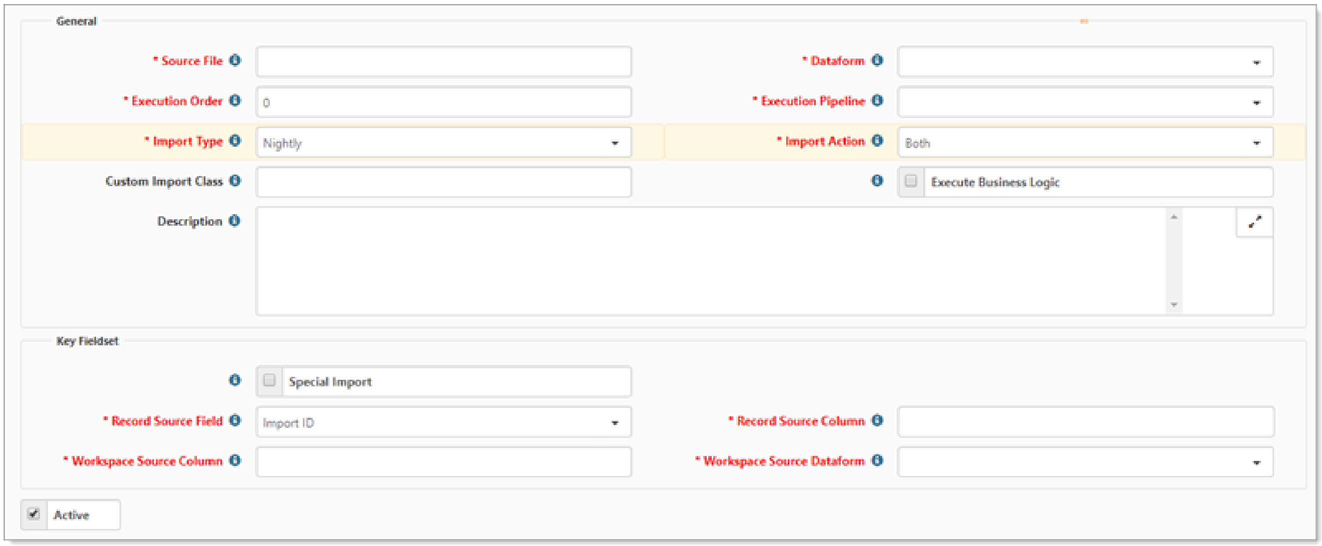
Field	**Description**
Source File	SFORCE_export_mapping*.csv
Dataform	Import_Organization
Custom Import Class	not yet implemented
Import Type	Salesforce Export
Execution Pipeline	ignored
Import Action	ignored
Execute Business Logic	ignored
Special Import	checked

Import Map Header

Use Import Map Headers to map data between ClientSpace and Salesforce.

To create the Import Map Header:

1. Go to **System Admin** ⚙ > **Advanced** > **Configure Import**.
   The Import Map Header Search page is displayed.
2. Click **Add**.
   The Import Map Header Detail form is displayed.



3. Complete the form fields:

Field	Description
Source File	SFORCE_import_mapping*.csv
Dataform	Import_Organization
Custom Import Class	not yet implemented
Import Type	Salesforce Import
Execution Pipeline	ignored
Import Action	ignored
Execute Business Logic	ignored
Special Import	selected

4. Click **Save**.

The next step is to add fields by configuring the import map detail.

To configure the Import Map Detail:

1. Open the newly created Import Map Header.
   The Import Map Header Detail form is displayed.
2. In **Action Items**, click **Fields**.
   The Import Map Search list is displayed, showing the existing fields.
3. To add a field, click **Add**.

The Import Map Detail form is displayed.

4. Complete the form:

Field	Description
Source Field	Ignored. Enter text that describes the source of this detail (OrgName or sfAcctName) for clarification.
Field and Project Type	This is where the data from Salesforce will be stored. Select any non-parent field type on any single-form. • When mapping **Organization**, select **Import_Organization** project type. • When mapping **Contact**, select **Import_Contact** project type.
API Path	This is where the data from Salesforce will be retrieved. The format of this field is SF_ObjectType/FieldName (e.g., Account/BillingStreet). • The only valid SF_ObjectType values are Opportunity, Account, Contact, Lead, Event, or Task. Other values are ignored. • Can only contain an SF_ObjectType and up to two subfields, as in Account/RecordType/Name. • Cannot contain special characters (other than '/') and no spaces. • Salesforce fields that are Calculated are not exported by ClientSpace because Salesforce does not allow them to be directly updated.

Data Type	• **Text**: Most fields should be mapped as Text (even if the source or destination fields are integers or dates/etc.)
	• **Lookup**: Not yet implemented (use Text).
	• **Foreign Key**
	  • Currently, this is only implemented for Imports and locating CS Users.
	  • It accepts a Salesforce User ID and locate that User in ClientSpace by Email. A call is made to Salesforce using the SF User ID. The SF User Email is located and used to find a matching Email in ClientSpace.
	• **Default Value**
	  • A Default Value can be set in this field.
	  • If a Salesforce field does not exist, the API Path must be set to Object/UseDefault. This default value is set in the appropriate ClientSpace field. For Imports the Object is not important, the Default Value is set in the CS field.
	• **Active**, **Required Value**, and **Required Column**

Field	Description
	• Only Active records are used. • Required Value and Required Column settings are ignored. • **Minimum Required Field**

5. Click **Save**.

Salesforce configuration

You must configure Salesforce before implementing this process. The Salesforce Partner WSDL is used because it is generic across Salesforce systems. The Client's Salesforce account must support this API.

Request the following from the Client:

- API Username
- API Password
- API Integration key Partner
- WSDL Url
  - Sandbox API
  - Url Production API Url
- Salesforce Web Interface login credentials (for testing and configuration)

Required Salesforce objects

The Client must create **a Work_Queue__c** object with at least **Id**, **Opportunity__c**, and **Complete__c** fields. This object is populated with records containing Opportunity IDs for Opportunities that are to be imported into ClientSpace. It is up to the Client to determine when a Work Queue record will be created, typically based on a set of rules in Salesforce. Additionally, the Client must create the following objects for the 2.0 version of the Salesforce API to be viable:

- LeadCompany (Lead/Company)
- ConvertedFromLeadID (Account/Converted_Lead_ID__c)
- ConvertedFromLeadID (Contact/Converted_Lead_ID__c)

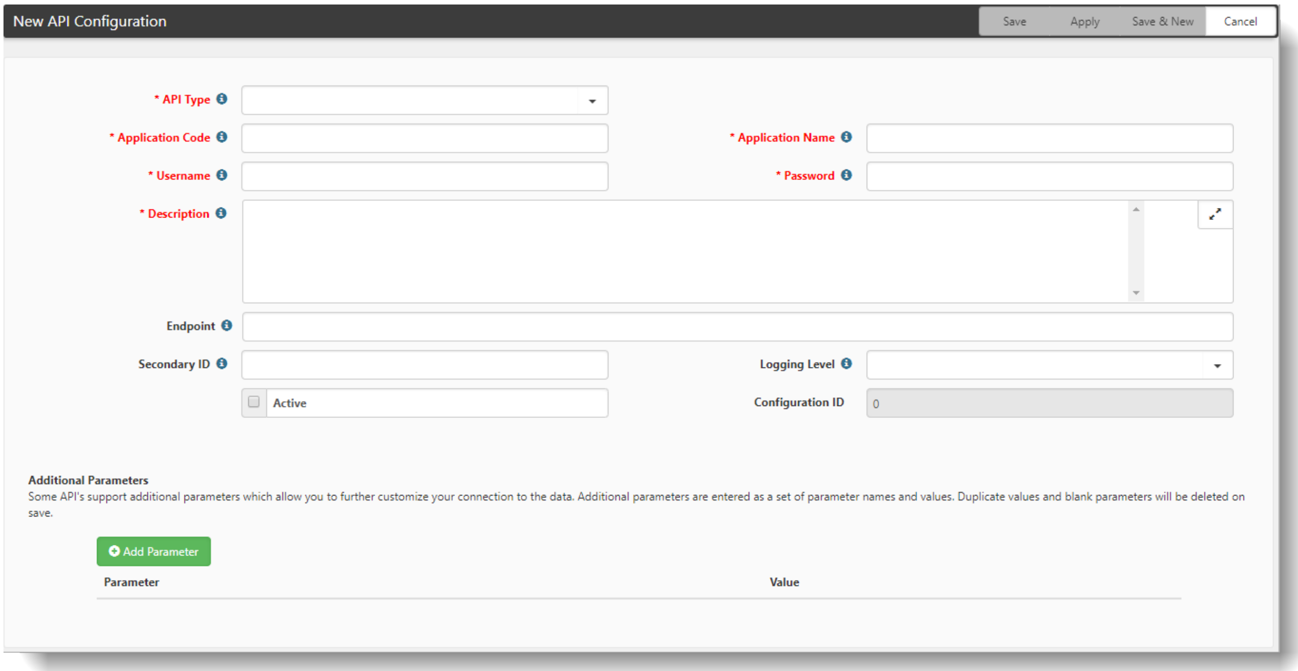
These objects are utilized by the API when working with Leads and Lead Conversion. These fields are required in the import configuration mappings.

Configuring ClientSpace

Several ClientSpace mechanisms must be configured before implementing the Salesforce API.

To configure ClientSpace:

1. Go to **System Admin** > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. Click **Add**.
   The New API Configuration form opens.



3. Complete the form:

API Type	Select **Web Service**.
Application Code	• **SFDCDEV** is the sandbox configuration • **SFDCPROD** is the Production configuration
Application Name	Type **Salesforce Integration** *(user choice)*
Username	Enter the username of the API account.
Password	Enter the password of the API account AND the integration key.
Description	Provide a description (user choice).
Endpoint	Type the URL of the API for the Partner WSDL.

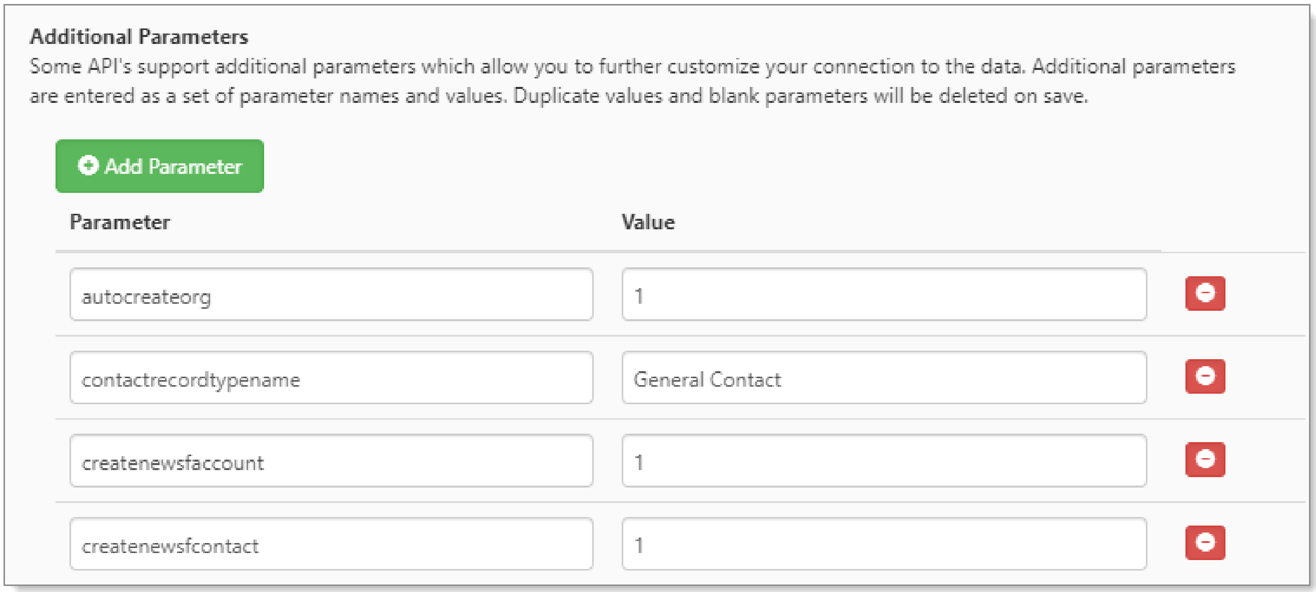
Secondary ID	not used
Logging Level	• **0** None • **1** Only logs that the process ran and the date/time begin and end • **2** Logs process details and results (for setup and debugging only)
Active	
Configuration ID	

Add Parameter	Additional Parameters are semi-colon delimited name=value pairs, such as *param1=value1;param2=value2*.
	
	Note: Spaces between parameters are not allowed.
	Example: “;<space>param2=” is invalid
	
	• exporttosf=x
	    ◦ **0** = No Export (CS changes will not be exported to Salesforce) (defaults to “0”)
	    ◦ **1** = Export to and Import from Salesforce
	• updatestage=x
	    ◦ **0** = Opportunity Stage will never be updated when exporting
	    ◦ **1** = Opportunity Stage will be updated when exporting (defaults to **1**), based on the following translation:

4. Click **Apply**.
5. To add more parameters, see the next topic Additional parameters.

Additional parameters

In the **Add Parameter** area of the API Configuration form (see the following image), you can customize your connection to the data using additional parameters, entered as a set of parameter names and values. Add these additional parameters by completing the Parameter - Value pairings, as shown.



The following table provides details for the Parameter - Value pairings.

Parameter	Value description
defaultorgowner	Specify a LoginID (username) as the owner of organizations that are imported from Salesforce, where the owner specified in Salesforce does not have a ClientSpace user account.
ExcludeUserNames	Specify a value that acts as a filter. User names that begin with the filter value, such as *abc*, are excluded during the user security import. The queue record is stamped with the message "User '<userID>' has excluded name, this record will not be processed."
exporttosf	• **0**: No Export (ClientSpace changes are not exported to Salesforce) defaults to **0** • **1** = Export to and Import from Salesforce

<table>
<tr><th>Parameter</th><th colspan="2">Value description</th></tr>
<tr><td rowspan="3">updatestage</td><td colspan="2">• 0: Opportunity Stage is never updated when exporting.
• 1: Opportunity Stage is updated when exporting.
(defaults to 1). Note: Export is based on Client Master status and stage.</td></tr>
<tr><td colspan="2">When the value = 1, the Opportunity Stage in Salesforce is updated by the export. The update is based on the following translation of the ClientSpace Client Master status and stage name. For example, when updatestage=1 and the Client Master status has moved from Accepted to Underwriting, then the stage is updated from Pricing to Proposal.</td></tr>
<tr><td>ClientSpace Client Master status
Prospect
Submitted
Accepted
Underwriting
PricingApproved
Approved
ContractPending
Negotiation
UnderContract (Onboarding)
PendingActivation
Terminated
Dead
Expired</td><td>Stage name
Pricing
Pricing
Pricing
Proposal
Proposal
Negotiation
Negotiation
Negotiation
Closed Won
Closed Won
Closed Won
Closed Lost
Closed Lost</td></tr>
<tr><td>csworkspacedataproc</td><td colspan="2">This proc exports workspace data (defaults to peo_salesforce_org_s_workspace_by_org).</td></tr>
<tr><td>csupdateproc</td><td colspan="2">This proc sets _CSUpdateAllowed (defaults to peo_salesforce_s_allow_cs_update). This proc determines when ClientSpace will begin ignoring Salesforce.</td></tr>
</table>

Parameter	Value description
csavailableupdates	This proc determines which ClientSpace changes are able to trigger an export (defaults to **peo_salesforce_s_available_cs_updates**). These must have associated Audit configurations in the Field Change Audit table.
querysize	1000 (must be this value)
sessionlength	29 (must be this value)
querybatchsize	-1 (must be this value)
version	2 (must be this value)
IgnoreWorkQueueErrors	Allows the admin to ignore work queue failures and mark them as completed, so they are not reprocessed. • Value of 0 or 1, defaults to 0. • Only applies to processing Work Queue records when there is a failure (could not save a form). • **0**: Work Queue record is NOT marked Completed (this is how it has worked in the past). • **1**: Work Queue record IS marked Completed and the WorkQueueErrorFieldName field in Salesforce is updated with the failure log info.

Parameter	Value description
WorkQueueInstance	This parameter enables the system administrator to process certain Work Queue records in Salesforce so that multiple instances of ClientSpace can use the Salesforce API for a single instance of Salesforce. To use this functionality, specify a value to match the Salesforce Work Queue field. **Salesforce Work Queue field** • If this field is **not found** on the Work Queue, all Work Queue records are retrieved, regardless of the API Config parameter setting. • If this field **is found** on the Work Queue, only those Work Queue records stamped with the value in the API Config parameter are retrieved. Your Salesforce administrator must set up the field and apply the rules necessary to insert the correct value into this field for each Work Queue record inserted. **ClientSpace Additional Parameters** • When this field is **not present**, all Work Queue records are retrieved. • When this field **is present** with an **empty** Value, all Work Queue records are retrieved. • When this field **is present** with a **populated** Value, only Work Queue records with the matching WorkQueueInstance value in the ClientSpace API Config are processed.
WorkQueueRecordsToProcess	Defines the max number of records to be processed at one time (defaults to 2000). • Can be set between 1 and 2000. Defaults to 2000. • If 0 or less, it is set to 1. • If > 2000, it is set to 2000. • Retrieves the TOP(X) number of records from the work queue ordered by LastModifiedDate ascending (the earliest records).

Parameter	Value description
WorkQueueErrorFieldName	Allows the admin to configure a custom field in Salesforce work queue item to capture API errors. Admin must have the ability to add an available custom field to the work queue record in Salesforce that is available for read/write through the API. Can be a rich text field to preserve log formatting. • Value of **<FieldName__c>** should be the name of the custom work queue record field name. Defaults to "" (empty). • If empty and IgnoreWorkQueueErrors = 1, the Work Queue is completed, and no error message is sent to Salesforce. • If **<FieldName__c>** and **IgnoreWorkQueueErrors** = **0**, the Work Queue is NOT completed and no error messages are sent to Salesforce. • If **<FieldName__c>** and field does not exist in the Work Queue, based on IgnoreWorkQueueErrors, the Work Queue may be completed with no error message sent to Salesforce. • Field must be configured in Salesforce and available.
timezoneoffset	Salesforce makes up the offset of the time zone from ClientSpace and sets the date a day back. This parameter corrects for the GMT offset that is applied by Salesforce. It matches the date in Salesforce to the ClientSpace date, and the time is set to 12:00 to match the ClientSpace record. To correct the GMT offset added by Salesforce, ensure that the **timezoneoffset** parameter is set to match the appropriate time zone of the ClientSpace installation (Time Zone Name in App Settings). In the Eastern time zone, this would be a value of -5. • **0**: Passes the value as is. • **–***n*: Subtract hours. For example, to subtract 5 hours, specify **–5**. • *n*: Add hours. For example, to add 5 hours, specify **5**.

Fields that can trigger an export

The following table lists the ClientSpace fields that, when changed, can trigger an export. For the default PEO proc (**peo_salesforce_s_available_cs_updates**), these fields and the associated system objects are as follows.

Associated system objects	Fields	
Org Trigger	• Name • AKA • Phone • Fax • crStatus • Address1 • Address2 • City • State • PostalCode	• Country • luCurrentPEO • crSource • crBusinessType • Website • IndustryCode • EmployerIDNumber • crCategory • DoNotCallP
Org Other Info Trigger	• EmployeeCount	• GrossPayroll
Contact Trigger	• fkOrganizationId • fkAssignedToUserID • FirstName • LastName • Title • Category • BusinessPhone • Email1	• CellPhone • Fax • Address1 • City • State • PostalCode • Country • Active
Contact Other Info Trigger	• mluContactType	
Client Master Trigger	• ClientNumber • Status • Dateof1stPayroll • ContractEffectiveDate • CorporationType	• luAltIndustryCode • SalesRegion • fkParentCompanyID • luKillReason
Incident Trigger fields (Task)*	• Status	
ContactManagementNote	• Notes	
manual sync	option on Client Master **Sync with PrismHR**	• SFManualSync

* Tasks in ClientSpace can be created by Salesforce task records from a Salesforce import (see the diagram in Process overview). If one of the ClientSpace tasks that was imported from Salesforce has a status change, it can trigger a Salesforce export.

Configuring the Salesforce username

Configure the Salesforce user in ClientSpace.

To configure the Salesforce user:

1. Go to **System Admin** > **Users**.
   The Users dashboard opens.
2. Click **Add**.
   The User Details form opens.
3. Complete the following fields:

Username	Type **sfservice**.
First	Type **Salesforce**.
Last	Type **Service User**.
Email	Enter the Admin Email address for ClientSpace (Go to System Admin > Advanced > App Settings).
User Type	Select **External**.
Authentication Type	Select **ClientSpace**.
Default Workspace	Select **Admin Workspace**.
Active	Select this option to enable the username.

4. Click **Save**.

Field Change Audit

The Field Change Audit table is used to determine when and what data will be Exported to Salesforce. **Field changes must be resolved to either tblOrganization, gen_ClientMaster or tblContact tables.**

- Configure the Table Metadata for the Forms/Fields that will be monitored for an update
- Export Example 1, tblOrganization related:

- Org Other Info "z_SomeField" is audited in the FCA table
- "z_SomeField" value is changed; this will cause an Export to take place
- The CSUpdateProc will map that field change to a "tblOrganization" trigger
- All tblOrganization (Import Organization dataform) and Org Other Info mappings will be used to populate the Salesforce Opportunity and Account object

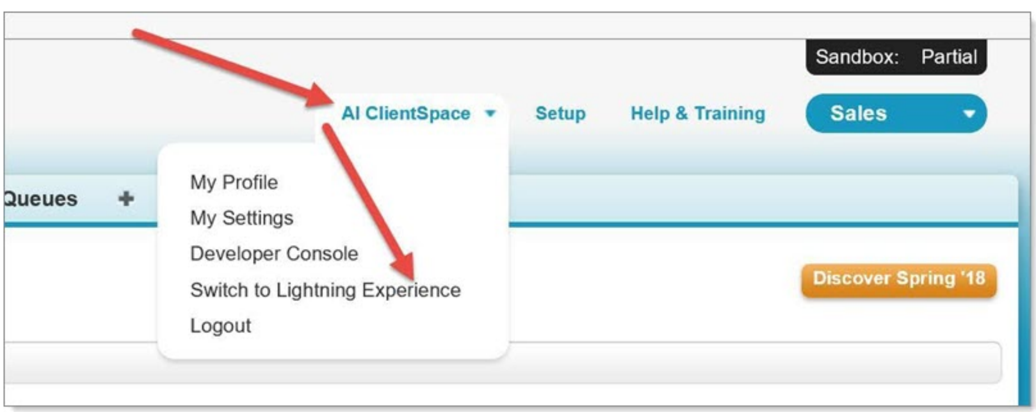
- Export Example 2, gen_ClientMaster related:
  - Client Master "z_SomeOtherField" is audited in the FCA table
  - Client Master "z_SomeOtherField" value is changed
  - The CSUpdateProc will map that field change to a "gen_ClientMaster" trigger
  - All Client Master mappings will be used to populate the Salesforce Opportunity and Account objects
- The 'csupdateproc=x' configuration parameter determines the stored procedure that will be used to collect the changes for Export
- PEO Default Configuration
  - Tbd

Finding the API path in Salesforce

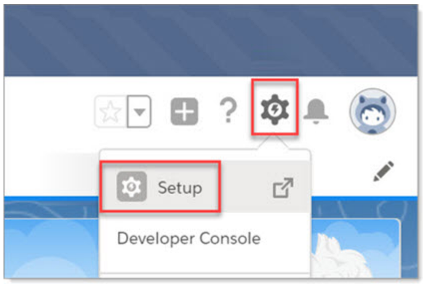
The API Path used to configure the Import Map details in ClientSpace can be found in Salesforce. To view the necessary settings, the Salesforce user must have administrative rights.

Use the Lightning Maps to ensure appropriate field naming:

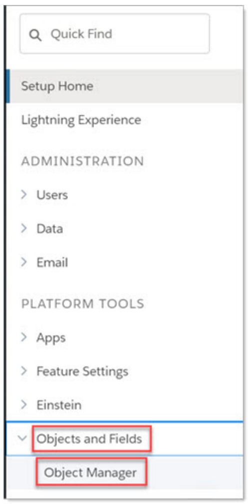
1. Select your ***username*** > **Switch to Lightning Experience**.



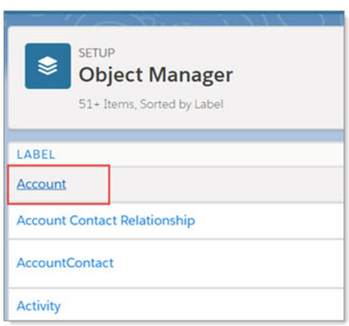
You will see an option for Setup in the upper right.



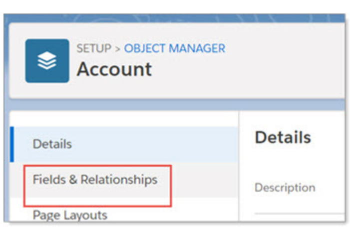
2. Click  and select **Setup**.
3. In **Setup Home**, select **Objects and Fields** > **Object Manager**.



The Object Manager page opens.



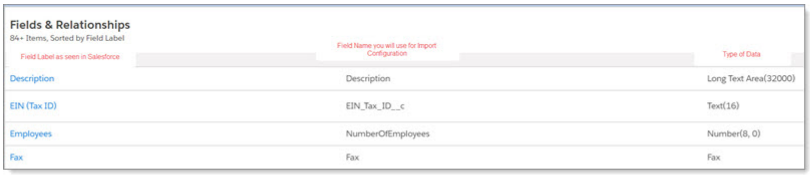
4. Select the appropriate Salesforce object.



5. When the object opens, select **Fields & Relationships** to get the Field data you will use in your ClientSpace mappings.

You will be presented with a page (or more depending on the object) containing the:

- Field Label (what appears in Salesforce)
- Field Name (the actual name of the field in the Salesforce database table)
- Type of Data



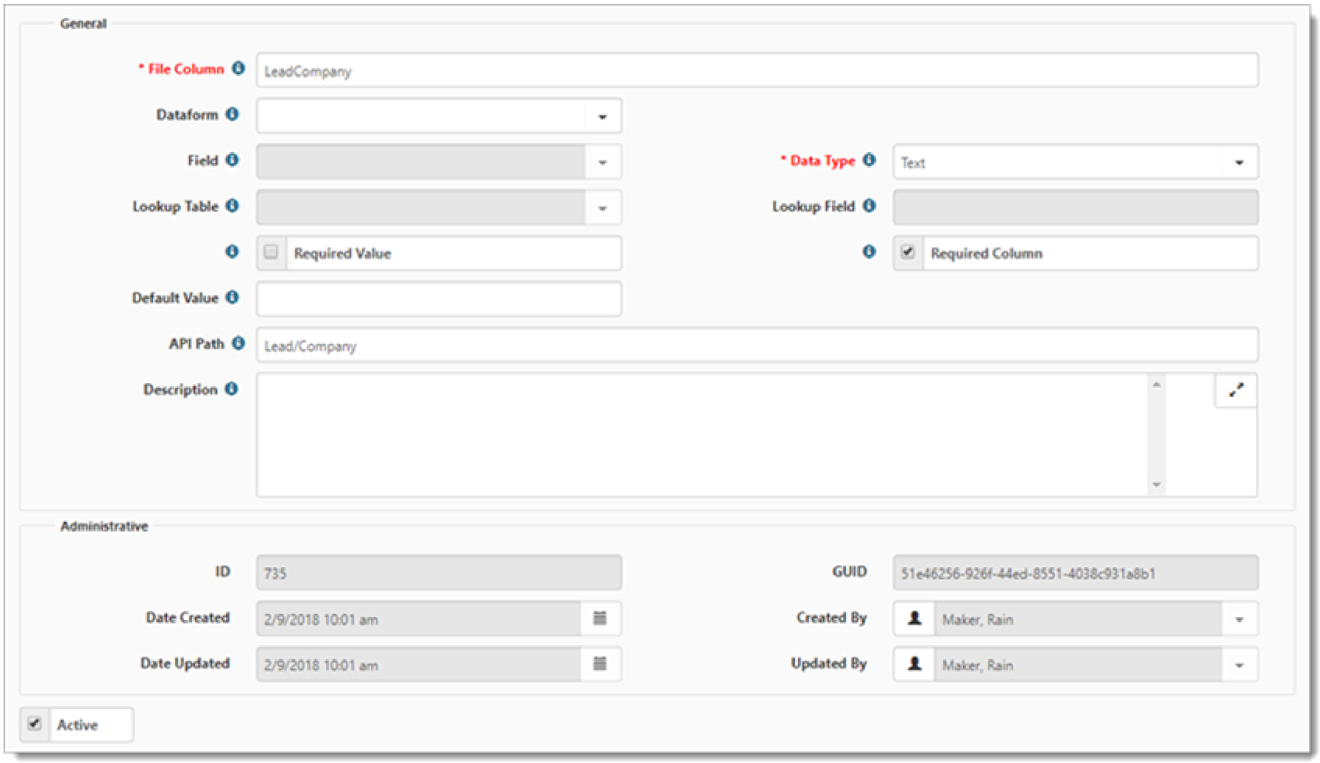
Required fields mapping

The following table provides the required field mapping for the import map detail.

Type	CS Table.Field	API Mapping	Data Type
Import			
	Do not select	Opportunity/RecordType/Name	Text
	tblOrganization.Name	Account/Name	Text
	tblContact.FirstName	Contact/FirstName	Text
	tblContact.LastName	Contact/LastName	Text
	tblContact.fkAssignedTo	Contact/OwnerId	Foreign Key
	Do not select	Lead/Company	Text
	Do not select	Account/Converted_Lead_ID__c	Text
	Do not select	Contact/Converted_Lead_ID__c	Text

Example

The following image illustrates an example of the import map details for Lead/Company.



After your Import and API Configurations are complete, you are ready to kick off an import using the Salesforce Scheduled Process.

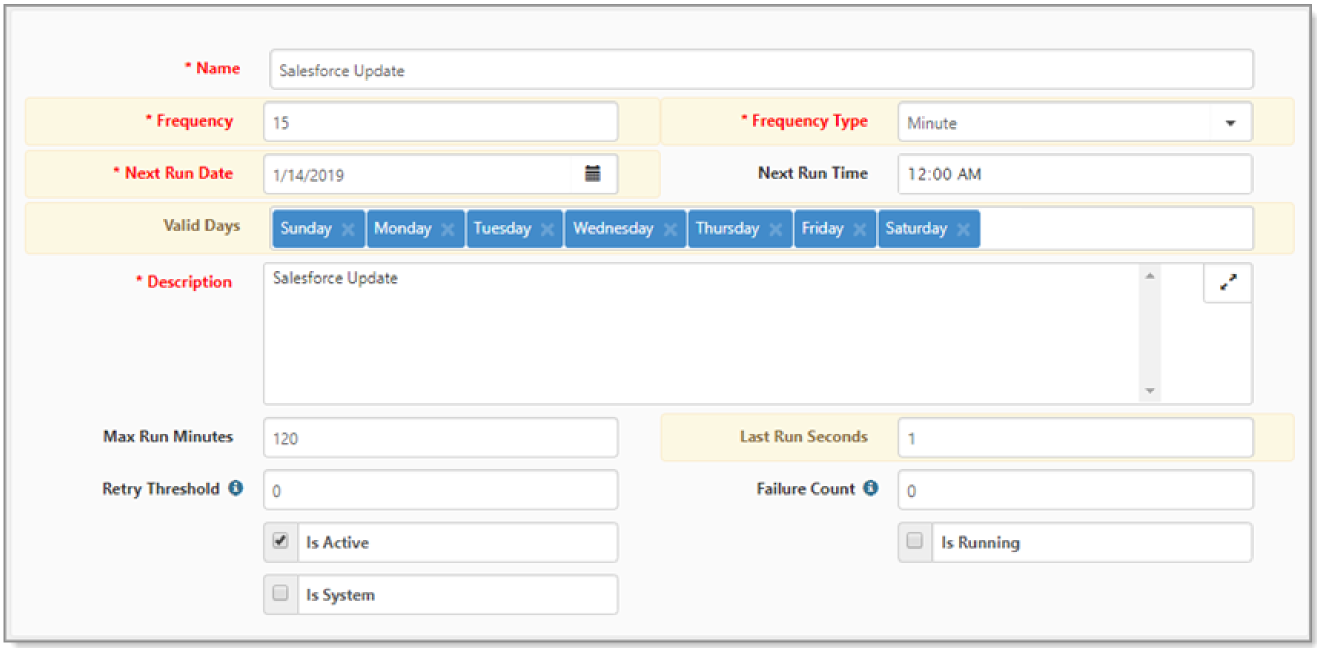
Business Intelligence report: API log

Construct your report to view records in **tblScheduledProcessHistory**:

- Join to the **tblScheduledProcess** table (SPH.fk = SP.pk) and include **SPH.ProcessStartDate**, **SPH.LogData**, and **SPH.ProcessEndDate**.
- Sort on **SPH.ProcessStartDate** descending.
- Filter on **SP.Method** = **“SalesForceUpdate”**

The Salesforce scheduled process

Importing Salesforce data relies on a scheduled process to keep the data in sync between the two systems. While this is not a real-time update, it should provide adequate connectivity between the two systems. The following example provides the recommended settings for processing the Salesforce Update.



Recommended settings:

Name	Salesforce Update
Frequency	15
Frequency Type	Minute
Next Run Date	Today's date
Next Run Time	Set to a future time when you would like the process to begin.
Valid Days	Select the days of the week you would like the scheduled process to run on. This can be business days, or every day, whichever fits your business model.
Description	Brief description. In the example, we used Salesforce Update.
Max Run Minutes	How long the process is allowed to run before automatically stopping.
Last Run Seconds (read-only)	This is a measure of how long the process took the last time it ran.
Active	Only active processes are run by the scheduler.

In the configuration example, the Salesforce Update process will run every 15 minutes beginning on 1/14/2019 at 12:00 am. The process will run every day of the week and will be automatically aborted if it takes more than 120 minutes to run.

Best practice: Salesforce field reference

As a best practice, take this opportunity to create a Datamap spreadsheet:

1. Create a new Excel Workbook.
2. Add a tab for each Salesforce Object that you would like to map to ClientSpace.
3. Drag all the fields on this Field Relationships page and copy and paste these values into Excel.
4. The result is a multi-tab spreadsheet that you can use as a reference when defining the API Path portion of your import Detail configuration.
5. If you are handy with Excel, you can write a formula to add the Salesforce object to the Field Name from this file to generate the API Path. For example, ="Account/"&B2 might produce "Account/Description" and so on.

Salesforce API v3

Salesforce must be configured to use this API.

Note: The Salesforce API v3 requires a Connected App to be configured (named **ClientSpace Integration**). If this does not exist, the client must work with their Salesforce expert to create this in their instance of Salesforce.

To modify the existing API Configuration:

1. Endpoint must be the base OAUTH server. Example: `https://test.salesforce.com/services/`
2. UserName and Password should be the same as the V2 configuration.
3. Apply the following parameter settings:
   - version = 3
   - consumerkey (new), enter from Connected App configuration
   - consumersecret (new), enter from Connected App configuration
   - restversion (new), Client must determine which version they are using

To find the Consumer Key and Consumer Secret in Salesforce:

After the Connected App is configured, obtain the Consumer Key and Consumer Secret tokens for that App. The following sub-sections explain how to obtain the tokens.

Using Salesforce Classic Experience

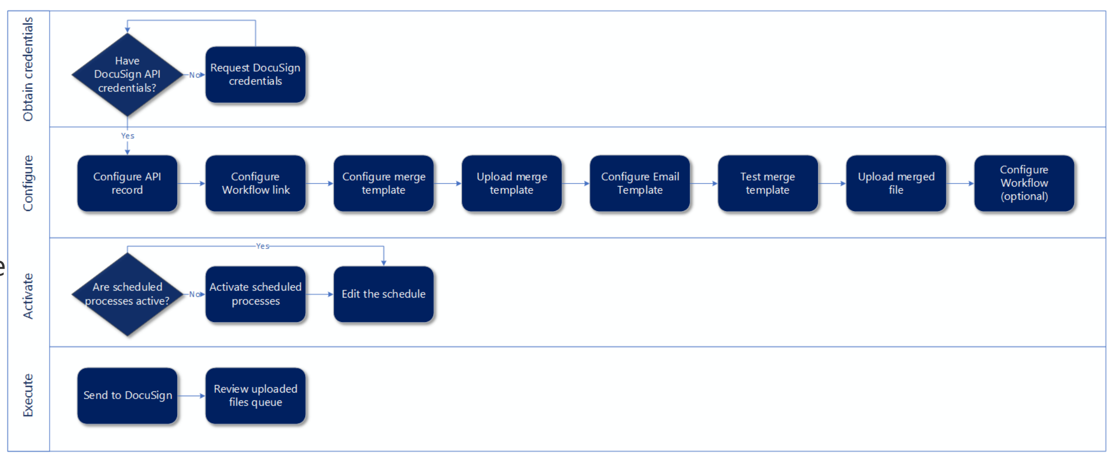
1. In Setup, click **Build** > **Create** > **Apps**.
2. Click the Connected App Name (NOT Edit. NOT Manage.). You can also click on Edit and then Save. This takes you to the same place.

Using Salesforce Lightning Experience:

1. In Setup, navigate to **Apps** > **App Manager**.
2. Find your Connected App in the list and select **View** from the associated list (on the far right of the list view). You can also select **Edit** and **Save**.
3. Obtain the Callback URL (endpoint) from the same place.

DocuSign

DocuSign is one of the most widely used e-signature applications in the world, allowing you to sign documents anywhere from any email-enabled device without overnighting, faxing, or waiting. ClientSpace integrates with DocuSign through an API configuration and the client's DocuSign account information.



Configuring the DocuSign integration comprises the following steps:

1. Configure the API record to enable ClientSpace to log in to DocuSign.
2. Configure the Workflow link for sending documents to DocuSign.
3. Configure the merge template for the DocuSign tags.
4. Upload the merge template to the Merge Admin in ClientSpace.
5. Configure the Email Template, which is the main conduit for the transfer of information between ClientSpace and DocuSign.

6. Test the merge template.
7. Upload the merged file to the Collateral form.
8. Send to DocuSign.
9. Review the uploaded files queue to monitor the status.
10. Notify users of status.

What's next? When you have the username, password, and endpoint information, you can begin configuring the API. Proceed to Configuring the API record.

Before you begin

Before you begin the DocuSign configuration, contact your DocuSign representative to request the API login information. You must have the following information before you start configuring the ClientSpace DocuSign API.

You must have	Description
Username	DocuSign user account code. The account code is provided by DocuSign as the API UserName and is in the form of a Globally Unique Identifier or GUID, a 32-digit character string formatted as **xxxxxxxx-xxxx-Mxxx-Nxxx-xxxxxxxxxxxx**.
Password	DocuSign user account password. Provided by DocuSign.
Endpoint	This is the DocuSign server URL to connect to their system and is determined and provided to you by DocuSign.

The ClientSpace API for DocuSign requires the purchase of DocuSign licensing. Before configuring DocuSign in your ClientSpace installation, please log an Extranet case to discuss DocuSign licensing.

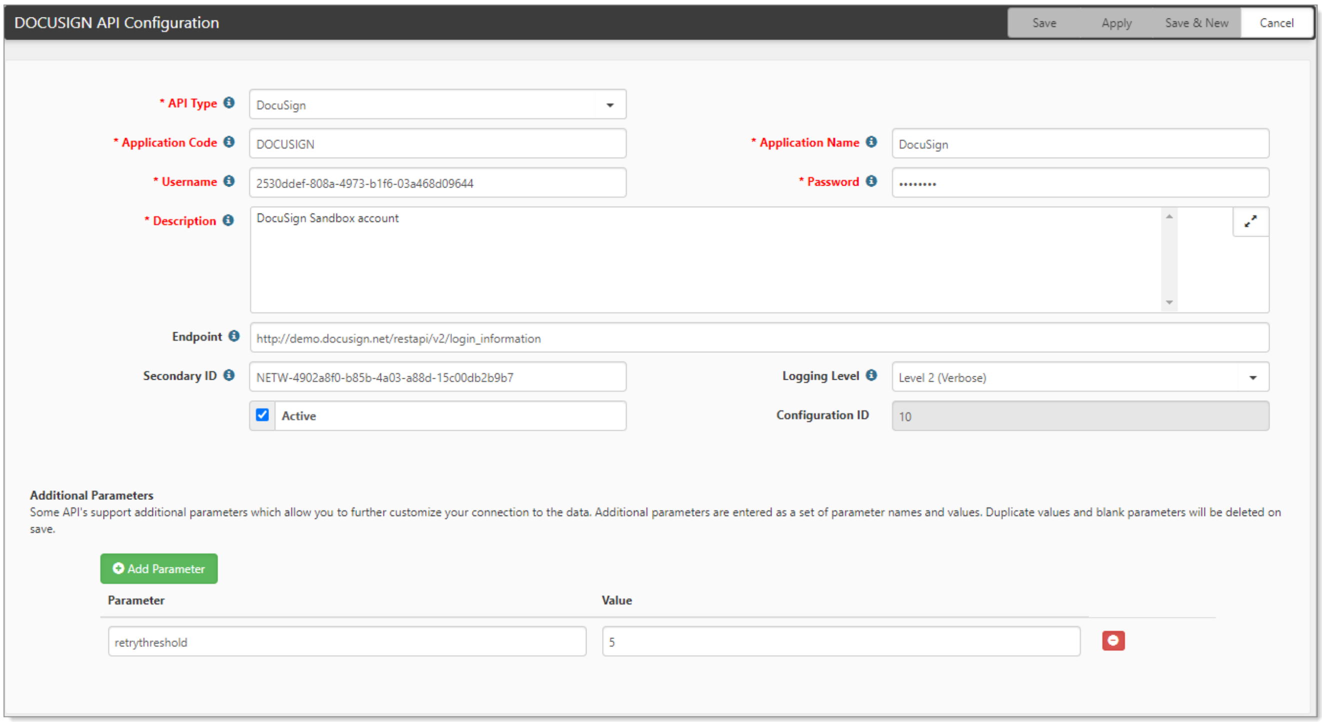
Configuring the API record

The API record connects ClientSpace to DocuSign. Your DocuSign representative must provide some of the following settings.

> Your DocuSign representative should have provided the items marked with an asterisk * (in the following table). **If you have not received these yet**, stop and contact DocuSign.

To configure the API record:

1. Go to **System Admin** ⚙ > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. To add a record, click **Add**. To edit an existing record, select the record and click **Edit**.
   The API Configuration form opens.



3. Complete the form fields.

API Type	Select **DocuSign**.
Application Code	Type **DocuSign**.
Application Name	Type **DocuSign**.
Username*	DocuSign user account code. Provided by DocuSign as the API UserName and is in the form of a Globally Unique Identifier or GUID, a 32-digit character string formatted as xxxxxxxx-xxxx-Mxxx-Nxxx-xxxxxxxxxxxx.
Password*	DocuSign user account password. Provided by DocuSign.

Description	Provide a brief description of how you are using DocuSign in your ClientSpace environment.
Endpoint*	Provided by DocuSign. This is the server URL to which we connect.
Secondary ID	Integration key (provided by ClientSpace Professional Services).
Logging Level	Not used by the DocuSign API. Logging for the DocuSign API is determined by the scheduled process. You can view log details in the uploaded files queue. See Viewing document status in the DocuSign process.
Add Parameters	The following parameters are name-value pairs for additional configuration.
retrythreshold	This is the number of times the system attempts to get a document if there are connection issues. In the Uploaded Files Queue, Retry Count tracks the number of errors when trying to get a DocuSign document. When the threshold is met, the Uploaded File Queue record is skipped. Default setting is **5**. See Viewing document status in the DocuSign process.
ExcludeVoidedFiles	This parameter is for Envelopes voided from within DocuSign. When a document is voided in DocuSign or from the Void workflow in ClientSpace, you can set this parameter to allow voided documents to upload or prevent the voided document from coming back into ClientSpace. **0**: Voided documents are uploaded to the linked form or field. This is the default setting if the parameter is not configured. **1**: Voided documents are only uploaded to the Uploaded Files Queue record, and not the linked dataform.
Active	Select this option to activate the record. Inactive API configurations are ignored.

4. Click **Save**.

Testing the API connection

After you create the API record, it's a good idea to test the connection.

To test the connection:

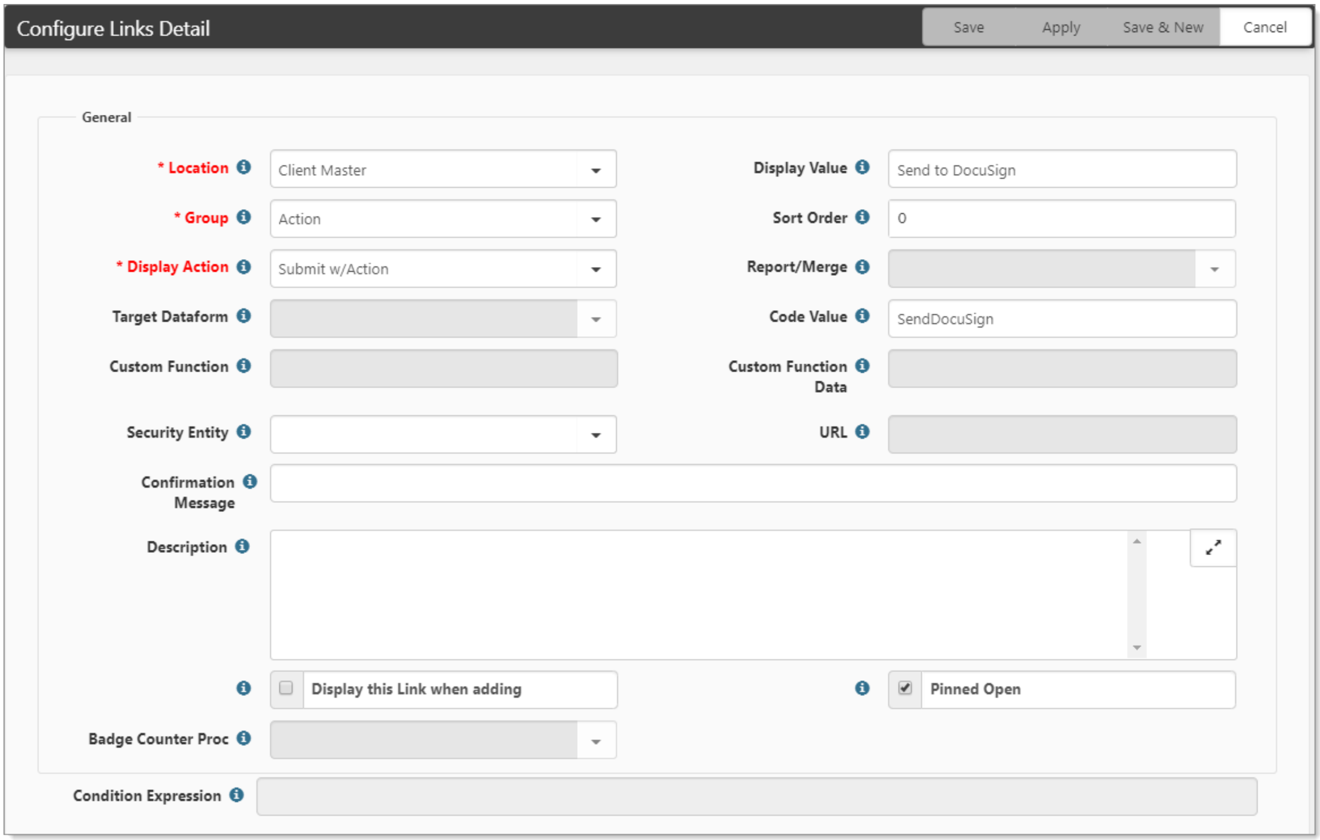
1. Go to **System Admin** ⚙ > **Advanced** > **Scheduled Processes**.
   The Scheduled Process Admin dashboard opens.
2. Look for the entry **DocuSign Request Signature** and ensure it is active.
3. Select the entry **DocuSign Request Signature** and click **Queue Process**.
4. After the process runs, go to **System Admin** ⚙ > **Exception Log**.
   The Exception Log dashboard opens.
5. Look for an entry for the API connection. If there is an error, this means that the API credentials are incorrect, preventing access to DocuSign. Review the API credentials, make adjustments, and test again. If there is no error in the Exception Log, this means the API connection was successful.
6. When you have confirmed a good API connection, proceed to the next step, Configuring the Workflow Link.

Configuring the Workflow Link

The next step is to set up a custom link on the Client Master, or other targeted dataform that initiates the submit action to DocuSign.

To configure the link:

1. Go to **System Admin** ⚙ > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Click **Add**.
   The Configure Links Detail form opens.



3. Complete the form.

Location	Select **Client Master**, or other targeted dataform that initiates the submit action to DocuSign. This is the name of the dataform on which you want the link to appear.
Display Value	Type **Send to DocuSign**. This is how the link will display in the Action Center > Workflow pane.
Group	Select **Action**. This denotes the type of link you are creating and drives the other fields on the form.
Sort Order	Use the default value.
Display Action	Select **Submit w/Action**.
Code Value	Type **SendDocuSign**. This is the HdrAction that is produced when the link *Send to DocuSign* is clicked (from the Client Master).
Security Entity	Optional. This field allows you to secure the link for viewing by

	selecting a security entity from those available in the system. Unless the user is in a role containing the security entity stored here, they do not see the link.
Confirmation Message	Optional. Allows you to display an OK / Cancel dialog box with a message before running the link action. Most often used with Action Links.
Description	Optional. A text description of what action the link performs may be recorded here. This description displays when you hover over the link on the dataform or system object.
Display this Link when adding	Optional. Dataforms prior to saving do not normally display links. This option allows you to display the link before the initial form save.
Pinned Open	Optional. When this option is enabled (selected), it forces the link always to be displayed in the Action Center. The link does not collapse when the associated group is collapsed.

4. To add a link display condition, click **Add**.
   Link display conditions might be used to control when the link appears, such as when the client is in the approved status. For details on how to add a link display condition, see Configuring link display conditions.
5. Click **Save**.
6. Proceed to the next step, Configuring the merge template.

Configuring the merge template

The merge template is where you register the DocuSign tags such as Signature, Date, Name, and Title. The tags reside in the contract document, such as a Client Service Agreement. You can use a Word doc, an Excel file, or a PDF as your merge template. For our example, we are using a Word doc.

Let's say that you have a contract that needs a signature, perhaps a Client Service Agreement. You want to use ClientSpace as the mechanism to automate the signing process so that you can also save the contract in the CSA field on the Collateral form. You create the contract with the appropriate statements, and at the end of the document is where you want dates, titles, names, and signatures.

1. Determine the required tags

Tags represent the input area for the contract signers to enter a date, name, title, and signature. You can configure as many tags as required. You must use a unique symbol that differentiates the tag from actual content. A pair of slashes is recommended because they are typically not used in content. You can use a backslash **** or forward slash **/**. For contracts that require multiple signatures, increment the tag numbers. For example, S1 represents the first signer, and S2 would represent the second signer, and so on. Don't forget to add dates and other text for the subsequent signers, such as D2, and N2.

- **Word docs**: Place the tags where you need input.

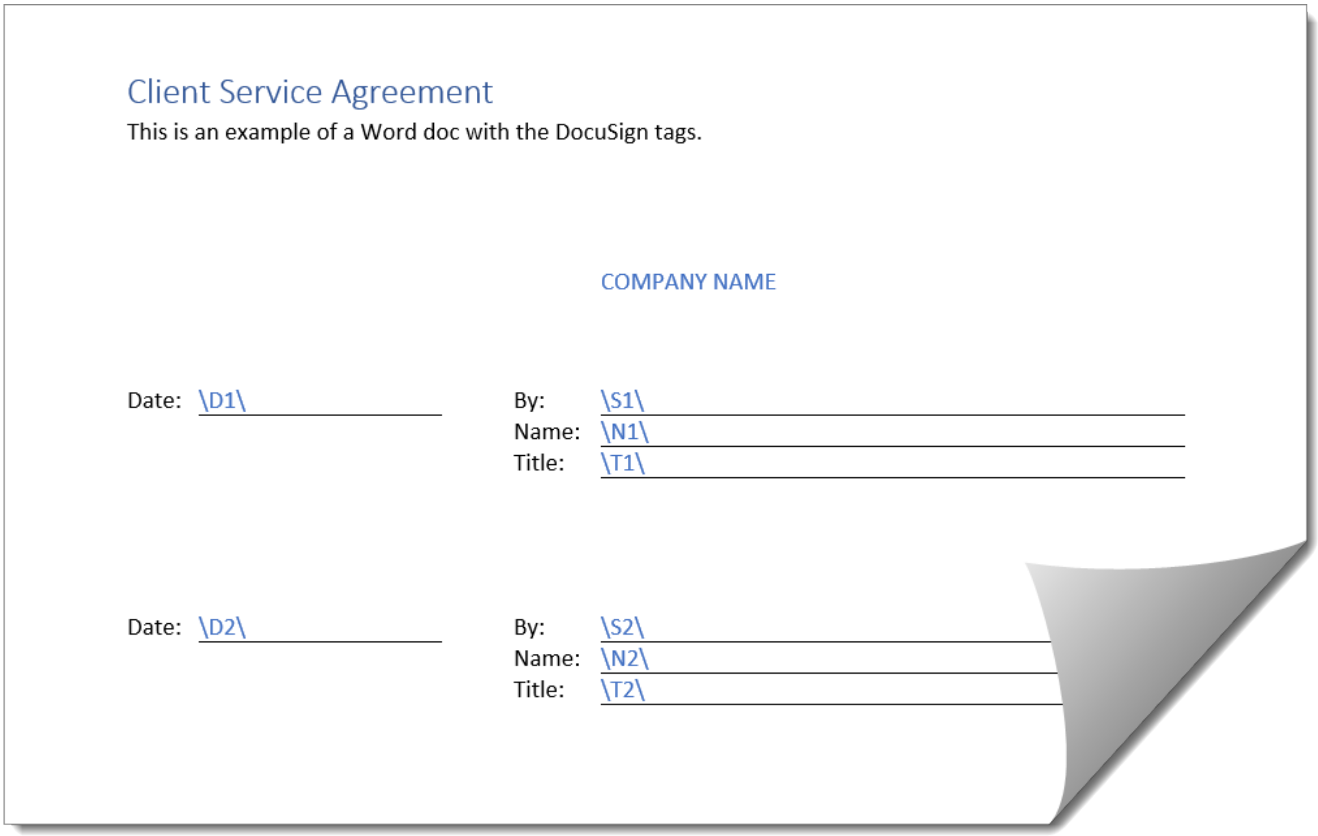
> Add the tag in a text box so that it can be easily adjusted up or down on the document. DocuSign actions often appear lower in the application than where the tag is configured on the merge template. Adding them in a text box allows you to make adjustments as to where they appear on the document.

- **Excel files**: Place the tags in the appropriate cells.
- **PDFs**: Open the PDF, select Edit PDF, and add the tag as text by selecting Add Text. A text box opens. Type the tag in the text box, such as \D1\.

2. Insert the tags

The next step is to configure your document so that you place the tags where the signers input data. The following example illustrates how you would use tags in the input fields for Date, Name, and Signature:

- **\D1** represents the Date for the first signer
- **\S1** represents the Signature for the first signer
- **\N1** represents the Name for the first signer



When you have configured your contract with the necessary tags, save the file with a unique name, such as **Client Service Agreement.docx**.

> Before you go live with the merge template, change the DocuSign tag font color to white. This prevents the tags from showing on the signed document. DocuSign can read the tags with a white font color.

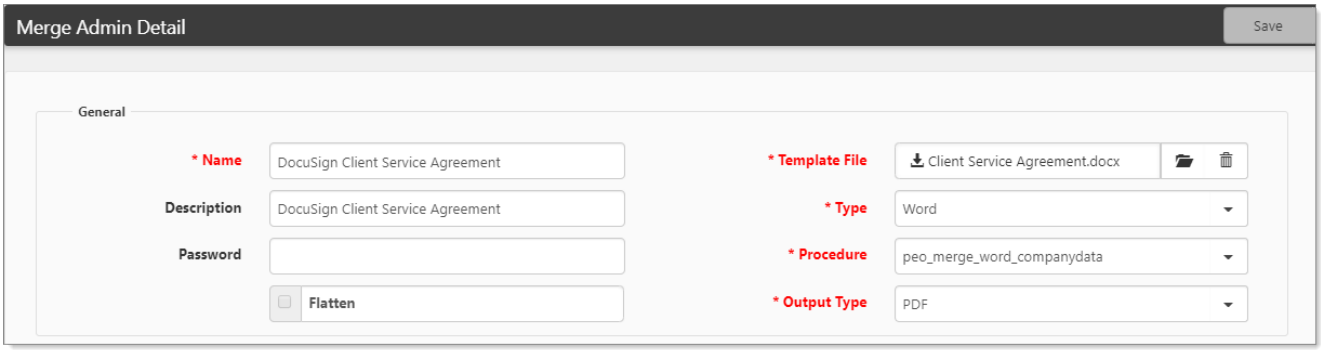
Now you are ready to proceed to the next topic, Uploading the merge template.

Uploading the merge template

Now you are ready to upload the merge template and then test it.

To upload the merge template:

1. Go to **System Admin** ⚙ > **Outputs** > **Merges**.
   The Merge Admin dashboard opens, showing a list of your existing merges.



2. Click **Add**.
   The Merge Admin Detail form opens.
3. Complete the form fields.

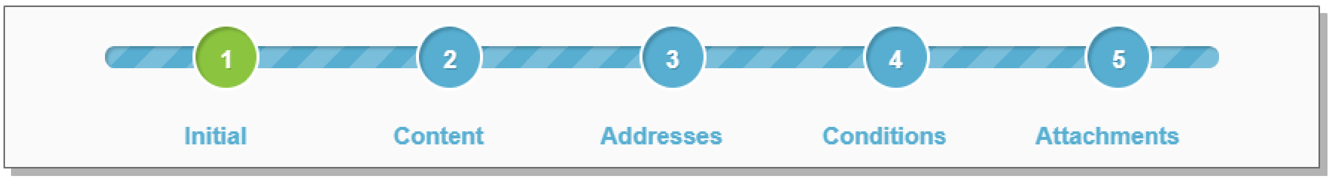
Name	Type a descriptive name for this merge record, such as *DocuSign Client Service Agreement*.
Template File	This is where you upload the template file. 1. Click (**Upload File**). The Upload File dialog box opens. 2. Click **Choose File**. 3. Locate the file on your computer and click **Open**. The file name displays next to Choose File. 4. For **Description**, type a description of the uploaded file. Optional. 5. For **Category**, select an entry from the list. Optional. 6. Click **Save**.
Description	Type a descriptive title of the merge record.
Type	Select the file type of the file you just uploaded: **Word**, **Excel**, **PDF**.
Password	Optional. Type a password to secure the administration of the merge record.
Procedure	Select a stored procedure from the list. The procedure you select is determined by the data you need to merge into the document. • For standard CSA documents, select a procedure with CSA in the name. • For Word output, you could select peo_merge_word_companydata.

	• For PDF output, you could select peo_merge_csa_pdf.
Output Type	This field is visible when **Type** is **Word**. For Type Word, you can generate a Word doc or a PDF.

4. Click **Save**.

Configuring the Email Template

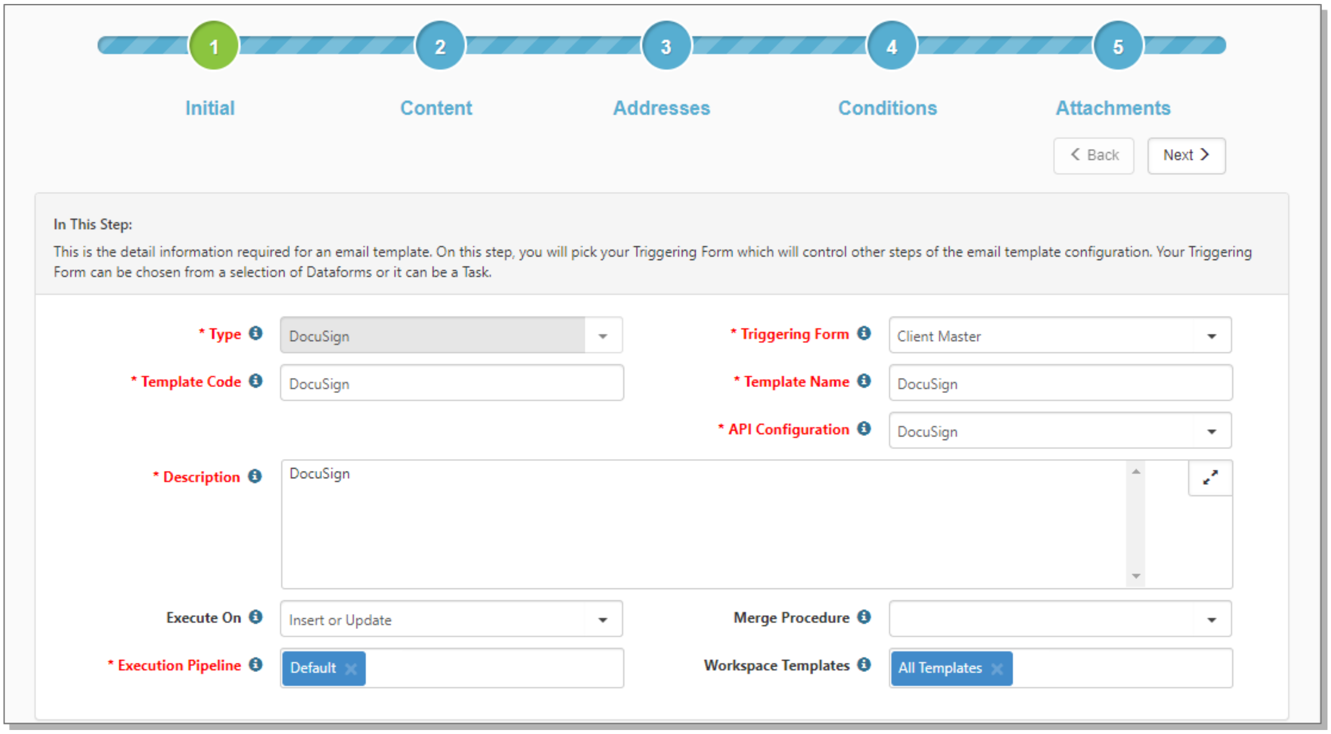
The Email Template is where you specify who is to receive the DocuSign notification and the tags that represent dates, signatures, and titles. This is how ClientSpace informs DocuSign what to look for. At this point, you have a merge template (in our example, a Word doc) that has been uploaded to ClientSpace and a workflow link that will be used as the trigger for the Email Template.



Step 1: Initial

To configure a DocuSign email template:

1. Go to **System Admin** > **Email Templates**.
   The Email Templates dashboard opens.
2. Click **Add**.
   The Add Email Template form opens to Step 1 Initial.



3. Complete the form.

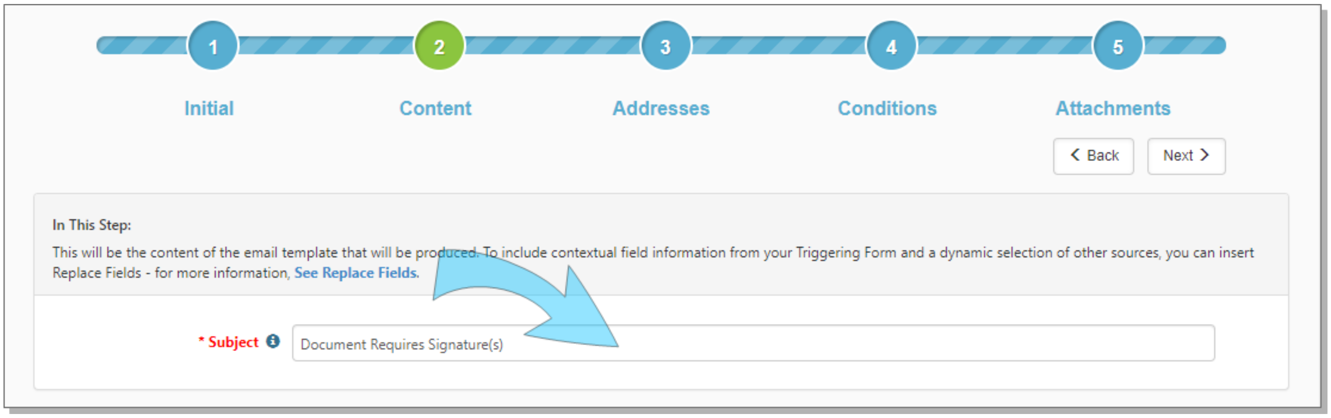
Type	Select **DocuSign**. This action enables the API Configuration field.
Triggering Form	This is where your trigger originates. Select the form on which you added the Workflow link, such as **Client Master**. (The Workflow link was added in a previous step, Configuring the Workflow Link, in the Location field.)
Template Code	Type **DocuSign**.
Template Name	Type **DocuSign**.
API Configuration	Type **DocuSign**.

4. Click **Apply**.
5. Click **Next**.

The Step 2: Content form opens.

Step 2: Content

In the Content step, you provide a unique Subject for the email message.



To configure the content of the email:

1. Provide a unique **Subject** line of the email to be generated.
   The subject is visible in the DocuSign email received. You can also use replacement fields in the Subject. The available fields are based on the Triggering Form you selected in Step 1 Initial.

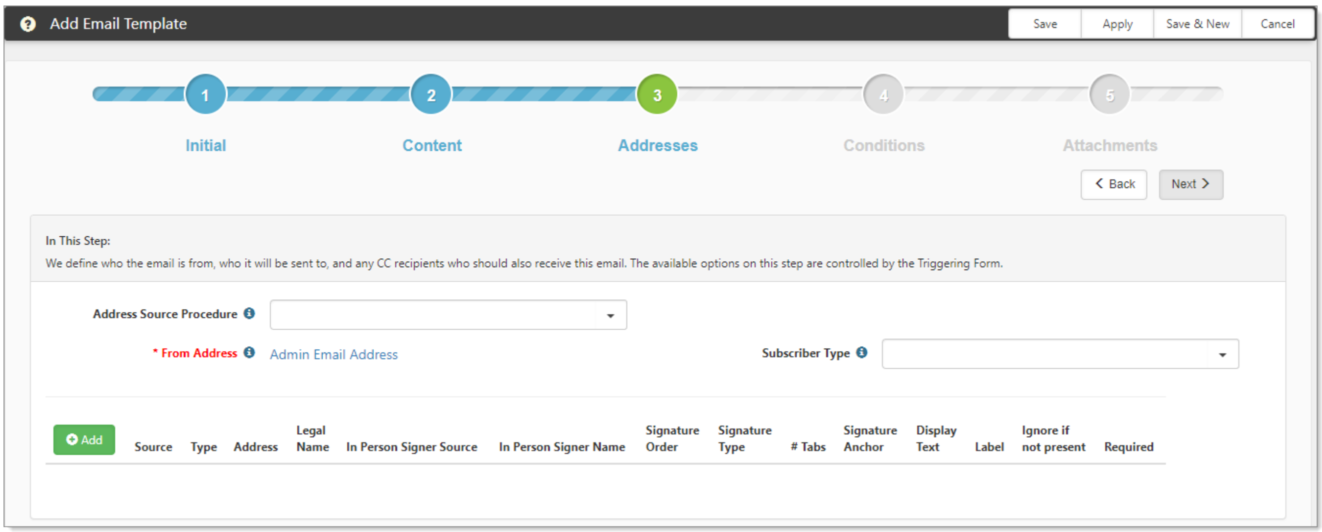
   > **IMPORTANT**: Ensure that you use a unique Subject on the DocuSign Email Template. DocuSign Email Templates with the same configured Subject line, when sent to the recipient, are grouped into the same email thread, which can confuse the recipient. Recipients could potentially overlook other emails that request a signature.

2. To use replacement fields, click **See Replace Fields**.
   The Replace Fields dialog box opens. For details about replacement fields, see Replacement Fields.
3. As you select items in the list, **Copy** becomes available.
4. When ready, click **Copy** to copy the items to your clipboard.
5. Back in the wizard, paste the items in **Subject**.
6. Click **Next** to proceed to Step 3: Addresses.

Step 3: Addresses

In this step, you code your tags for DocuSign in the green Add section. The tags tell DocuSign what to read to determine if the field is a signature, a date, or a text field. These are the tags that you registered in your merge template. Ensure that your merge template tags match the Signature Anchor (in the following procedure).

You can also send a document with the requirement for In Person Signing, which is used when a valid DocuSign user acts as a signing host for a signer. The document is sent to the signing host who physically delivers the document to the In Person Signer for signatures. For details on how to set this up, see Configuring the DocuSign email template for In Person Signing.



To configure the tags:

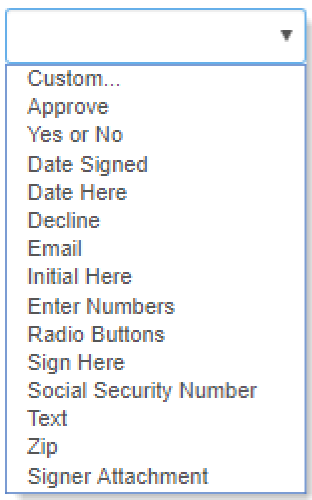
1. Complete the form fields.

Address Source Procedure	Select a stored procedure (optional) that can provide additional address options based on system data. A stored procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_recipient_proc**.
From Address	Select the From Address for the email. You can select from a distinct set of options: • **Admin Email**: Uses the default admin email set in the systems App Settings. Only User Developers can change this email address. For assistance, please log an Extranet case.

	• **AdHoc**: Allows you to add the From list by typing it in manually. • **User**: Select a specific user of the system by selecting them from a list. • **Procedure**: Select an address stored procedure and pick the From Address. • **Field on a Form**: Select a dataform from a list of single forms in the system that have fields from which an email can be extracted. Then pick the appropriate field.

2. To add your tags for DocuSign, click **Add**.
   A new row opens for adding DocuSign fields on the merge document.

Source	Source is the dataform where the field for the recipient is stored. The field can be a contact for a user field. The document is sent directly to these users. For Adhoc Email Address, enter the email address of the signer in the Address field.
Type	This field indicates the type of signature: • Signer • In Person Signer If you select In Person Signer, see Configuring the DocuSign email template for In Person Signing.
Address	This is the email address of the person who must sign. • When Source is a dataform, select the user or contact type field on the form from which you would like to extract the email address. • When Source is **Address Source Procedure**, select the appropriate option. • When Source is **Adhoc Email Address**, enter the email address to which you would like to send, such as bsmith@test.com.
Legal Name	This is the legal name of the person who must sign. • When Source is **Adhoc Email Address**, enter the Legal Name of the signer that matches the Adhoc Email Address, such as Robert Smith. • When Source is a dataform, this field is set to TBD and automatically filled from the User or Contact FirstName LastName

	specified in Source and Address, when the email is sent.
In Person Signer Source	See Configuring the DocuSign email template for In Person Signing.
In Person Signer Name	See Configuring the DocuSign email template for In Person Signing.
Signature Order	This field determines the order in which the signature fields are presented in DocuSign. A recommended best practice is to use the order the signature tags are presented in the document, top to bottom, left to right as the signature order. As you add tags, the process continues with ascending numbers, giving them each a new number (reference the screenshot that follows this table). However, the signing order is per recipient, each of that recipient's tags that they need to address in DocuSign.
Signature Type	 Select a Signature Type. When you select a type, this action places the appropriate DocuSign action on the document. Additionally, ClientSpace does not literally add check boxes to the form. We put the action tag in the document and let DocuSign do the heavy lifting when the document is compiled. Signature actions range from Approve, to Initial Here, to Sign Here, and many other tags. For assistance with custom tags, such as custom formatted fields and radio buttons, log an Extranet case. To implement Radio Buttons as a Signature Type, you must configure Radio Buttons as a custom type within DocuSign.
# Tabs	If **Ignore If Not Present** is selected, it will clone that Recipient and Tab for the number of Tags that are needed, appending "-1", "-2", and so on to the end of the tag. This enables a dynamic number of Tags that are generated by merge SQL and placed into the document while only having to set up one Recipient record on the email template. Let's say you have a \Name\ tag for the signee's name. Instead of creating separate \Name\-1, \Name\-2, \Name\-3

	recipient entries, create a single recipient entry with the tag of \Name\ and set the **# Tabs** to 3. It is a best practice to check the **Ignore if not present** option, otherwise DocuSign will reject the document if all tabs are not present. By default, the # Tabs is set to 1. This means that this tag is only present one time in the document. If you want to clone the tag and allow it to be used multiple times throughout the document, change the # Tabs to the number of potential tags you may have. Therefore, you only need to set this if you need multiples of the same. If you use # Tabs for Radio Buttons or Yes/No actions, it will fill all of those DocuSign tags the same way when the signer responds. For example, if there are three Tabs for Yes/No action and the signer responds Yes to one, it marks Yes to the remaining two as well because the tags have the same label.
Signature Anchor	This is the custom tag that you embed in your DocuSign document that is used to merge the signature action in DocuSign. While there is no set standard, it is important to use a custom tag that does not occur naturally in written text. An example of a signature location for Initial 1, for example, could be \init1\ or for a signature, \S1\. The associated tag in the merged document must match this signature pattern exactly. Ensure the tags you used in your merge template match the tags in Signature Anchor. See Configuring the merge template.
Display Text	This value appears in the tooltip of the Signature field on the document that is being signed. It is displayed near the signature location as instructions on what to do in DocuSign. For example, an initial location might have a signature display text of “Initial here”. Check boxes might state, “Select all that apply” and so on.
Label	Descriptive text that is displayed in the ClientSpace list to provide a more complete description of that recipient item. For example, instead of multiple Signature items in the list, you may want to use the label to indicate the type of signature, such as Principal Signature or Risk Signature, and so on.

Ignore if not present	DocuSign allows you to include a parameter on each Recipient/Tab in the envelope called Ignore If Not Present. The DocuSign integration allows you to define and include a recipient and associated tags in the envelope but not throw an error if that tag is not found in the envelope's documents using the Ignore If Not Present option on the recipient configuration. This makes tags optional as the system allows the send to DocuSign with or without tags marked in this way. When the **# Tabs** exceeds 1, you can enable this option by selecting Yes. The default setting is No. For Radio Buttons or Yes/No actions, ensure that each tag has a different label value. When these tags have the same label, DocuSign applies the response that the signer enters in one tag to the rest of the tags of that same action/label. For Email Templates with multiple documents that also have conditions on the contract type or required addendums, use the **Ignore if not present** option. Enabling this option allows the DocuSign email to be sent when that document is not included.
Required	 Indicate if this is a required field for the Signer during the DocuSign process. This option helps to streamline the process for signers when the fields are not applicable. When selected (Yes), the Signer must sign the custom tag. When not required (No), the tag appears as optional to the Signer. **Note:** For existing Email Templates (configured before R93), the tags are set to Required unless you change them.

In the following example, each row represents a signer action such as signature, date, and title. The Signature Anchor column (noted in the image) uses the tags from the merge template. This example shows two signers (S1 is John Smith and S2 is Bob Jones), and each signer must indicate a date and add their title.

After the first person has signed, the process sends to the next person to sign. DocuSign reads all the tags for the first signer, then goes to next one. If the entries are out of order in the Email Template, it does not matter. The processing order proceeds by signer. Our example shows two signers, John Smith and Bob Jones. All the tags for John Smith are processed before the tags for that of Bob Jones. This is the case even if the tags for the signers were in a different order than shown in the example.

Add	Source	Type	Address	Legal Name	In Person Signer Source	In Person Signer Name	Signature Order	Signature Type	# Tabs	Signature Anchor	Display Text	Label	Ignore if not present	Required
	Adhoc Email Address	Signer	jsmith@prismhr.com	John Smith			1	Sign Here	1	\S1\	Sign Here	CEOSign	No	Yes
	Adhoc Email Address	Signer	jsmith@prismhr.com	John Smith			2	Date Signed	1	\D1\	Date	CEODate	No	Yes
	Adhoc Email Address	Signer	jsmith@prismhr.com	John Smith			3	Text	1	\T1\	Title	CEOTitle	No	Yes
	Adhoc Email Address	Signer	bjones@prismhr.com	Bob Jones			4	Sign Here	1	\S2\	Sign Here	VPSign	No	Yes
	Adhoc Email Address	Signer	bjones@prismhr.com	Bob Jones			5	Date Signed	1	\D2\	Date	VPDate	No	Yes
	Adhoc Email Address	Signer	bjones@prismhr.com	Bob Jones			6	Text	1	\T2\	Title	VPTitle	No	Yes

3. Click **Next** to proceed to Step 4: Conditions.

Configuring the DocuSign email template for In Person Signing

The DocuSign API supports In Person Signing, which acts as an electronic notary system that sends the e-document to a third party who then has the document signed in their presence to verify the transaction.

For example, if you are meeting in person with someone, you can use In Person Signing to simplify the signing process. With In Person Signing, a host facilitates a DocuSign session. The host must be a DocuSign account holder. Signers are only required to be with the host to sign documents. Conducting the in person signing session entails getting together with your signers and initiating the signing session from your device. As the host, you start the signing session and then guide your signers through the process.

In Person Signer and Signing Host

With the In Person Signing feature, you set up an envelope and assign it to a DocuSign user who will act as a Signing Host for the process. The signer goes to the same physical location as the signing host; the host then initiates the signing process and then helps the signer complete the electronic documents.

For the DocuSign API, you identify the Signing Host and the In Person Signer. In Person Signer recipients are DocuSign users. Signing hosts are in the same physical location as the In Person Signer. The document is sent to the signing host, who physically presents the document to the In Person Signer for signatures. An in person signing can include both In Person Signers and regular recipients.

How In Person Signing works

Our scenario involves a signing host and an In Person Signer:

- The host is an insurance agent. The agent meets with a client to review a new health insurance policy.
- The host is established as the Signing Host. The client is the In Person Signer.
- The host starts the signing process and guides the client through the signing process.

When starting the signing process, this is the message the signing host receives:

> John Adams assigned you as the host for an in-person signing session for *Nathan Hale*. As a host, you will:
>
> 1. Pass control of the signing session to the hosted signer.
> 2. Ask the signer to enter any required authentication information.
> 3. Help the signer sign and get a copy of the finished document.
> 4. Take control of the signing session.
> 5. Log in to your DocuSign account to complete the signing session.

Next:

- Pass control of the session to Nathan Hale.

After signed by the In Person Signer:

- To complete the signing process, pass control back to <hostname>.

Next:

- The Signing Host is prompted to log into their DocuSign Account.
- After logging into the DocuSign Account and finishing that task, subsequent signers are emailed. If you do not complete this step, the process halts.

To configure DocuSign for in person signing:

1. From Step 3 Addresses, complete the form fields.

Address Source Procedure	Select a stored procedure (optional) that can provide additional address options based on system data. A stored procedure can be selected from any stored procedure in the system with a name containing **emailtemplate_recipient_proc**.

From Address	Select the From address for the email. You can select from a distinct set of options: • **Admin Email**: Uses the default admin email set in the systems App Settings. Only User Developers can change this email address. For assistance, please log an Extranet case. • **AdHoc**: Allows you to add the From list by typing it in manually. • **User**: Select a specific user of the system by selecting them from a list. • **Procedure**: Select an address stored procedure and pick the From address. • **Field on a Form**: Select a dataform from a list of single forms in the system that have fields from which an email can be extracted. Then pick the appropriate field.

2. To add a new recipient record to this notification, click **Add**.
   A new row opens for adding recipients. Each recipient's source, type, and address must be unique.

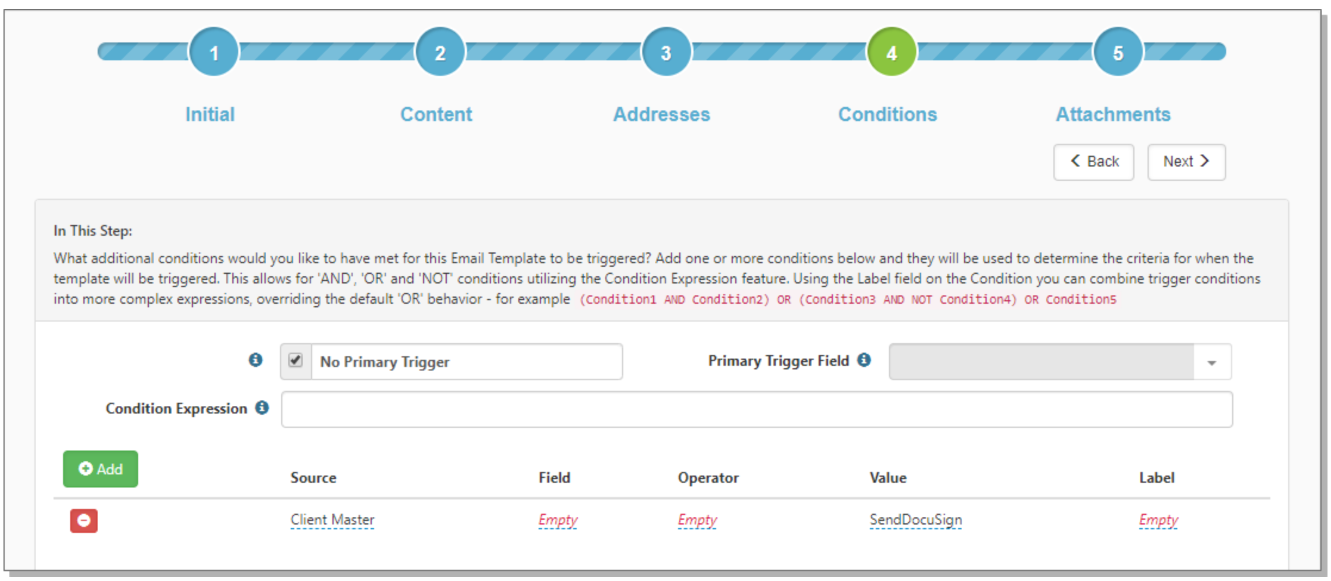
Source	This is the source of the Signing Host. • For dataform sources, this is where the signing host's email address and legal name are retrieved. • For Source as Adhoc Email Address, enter the email address of the signing host in Address.
Type	For in person signers, select **In Person Signer**.
Address	This is the email address of the signing host. This must be a valid DocuSign user account or DocuSign will reject the document. • When Source is a dataform, this is the signing host's email address. • When Source is **Adhoc Email Address**, enter the email address of the signing host.
Legal Name	This is the legal name of the signing host. This must be a valid DocuSign username or DocuSign will reject the document. • When Source is **Adhoc Email Address**, enter the Legal Name of the signing host. • When Source is a dataform, this field is set to TBD and automatically filled from the User or Contact FirstName LastName specified in Source and Address.

In Person Signer Source	This is the Source of the person who must sign in the presence of the signing host. • When Source is a dataform, this is the form from which to retrieve the In Person Signer's Legal Name. • When Source is Adhoc Email Address, enter the Legal Name of the Person who must sign in the In Person Signer Name field.
In Person Signer Name	This is the name of the person who must sign in the presence of the signing host. • When In Person Signer Source is a dataform, this is the field from which to retrieve the In Person Signer's Legal Name. • When In Person Signer Source is Adhoc Email Address, enter the In Person Signer's Legal Name.

3. For details about completing the additional fields/columns, see Step 3: Addresses.
4. Click **Apply**.

Step 4: Conditions

Conditions are display conditions and can also include Condition Expressions. Condition Expressions use the labels that you define for your Display Conditions. For a detailed explanation about conditions, see Condition Expressions.



To configure conditions:

1. Complete the fields:

No Primary Trigger	When selected, no single condition must be met to trigger the email template. When selected, the **Primary Trigger Field** is disabled.
Primary Trigger Field	Optional. From the Triggering Form selected in Step 1, which, when changed, triggers the event. This can also be a HdrAction, such as a configured action link on the form. The following statements refer to the condition entries in the **Add** area. Condition entries are identified with a **Label** (the last column). • If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions. • If a Primary Trigger Field is not selected, only the conditions are evaluated. • If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND. • If no Condition Expression is used, the additional conditions are treated as OR conditions. The Primary Trigger Field only displays fields associated with the triggering dataform and includes the ability to Add Untriggered Field. **At this point, you can add a trigger field:** 1. In **Primary Trigger Field**, go to the end of the list and select **Add Untriggered Field**. The Select an Untriggered Field dialog opens. **Field** contains a list of fields currently not marked as Triggerable. 2. In **Field**, select an entry. 3. Click **Ok**. The selected field is marked as triggerable and appears in the Primary Trigger Field list.

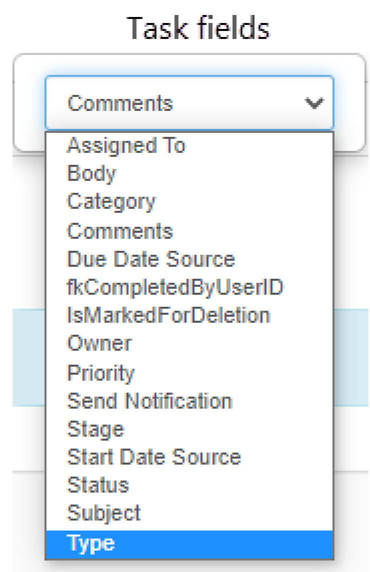
To add display conditions:

2. Click **Add**.
   A row opens with columns Source, Field, Operator, Value, and Label. The Add section is where you can add more granular triggering conditions. Each row you add is a display condition. When

Condition Expression is empty, the display conditions process as ORs, meaning only one of the conditions must be met for the email notification to trigger.

<table>
<tr><td>Source</td><td>Source is the dataform or stored procedure that provides the triggering condition. Source includes all active, single forms and dataforms included in a tabbed set. Source aligns with Implementation Groups. For example, if you do not use risk functionality, then risk related dataforms are not presented in the list.
When you select Task as the Triggering Form in Step 1 Initial, in this step Source sets to Task.

HdrAction is only available when Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.</td></tr>
<tr><td>Field</td><td>



Select the dataform or Stored Procedure field to compare to the trigger value.
A few notes:

Email Template triggering provides multi-lookup fields (Multi Lookup (MultiLookup)) as triggering conditions.
Field supports parent form fields (only available operators are empty, not empty, and dirty).
You can Add Untriggered Fields dynamically as well as current, active, triggerable fields from the Source.

To add a trigger field:

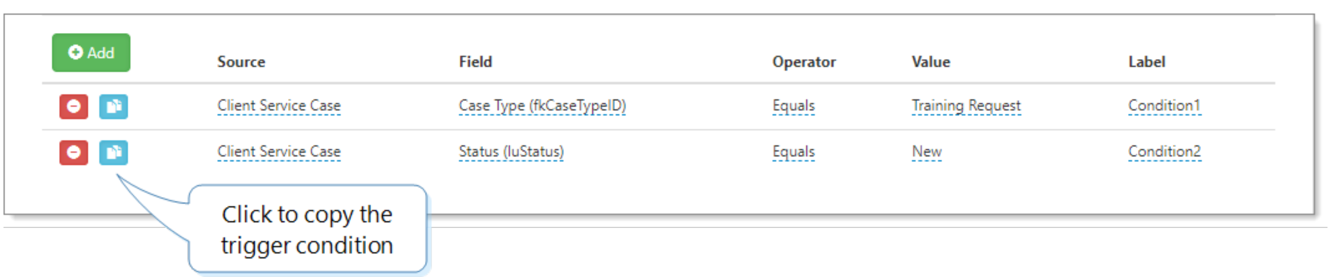
In Field, go to the end of the list and select Add Untriggered Field.
The Select an Untriggered Field dialog opens. Field contains a list of fields currently not marked as Triggerable.
In Field, select an entry.
Click Ok.
The selected field is marked as triggerable and now appears in the Field list.

</td></tr>
</table>

Operator	Choose the type of comparison. Each value from a Multi Lookup Trigger Field can be added as a separate "=" condition. This supports complex AND, OR, and NOT conditions as well. Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
Value	The criteria against which the trigger field is compared. For a condition that is using a user datatype as the Field, the Value field uses a typeahead[1] method so that you do not need to look up the User ID for the text field.
Label	The label to use when constructing Condition Expressions for triggering. Make this label short and representative of the Trigger Field. Labels are used in the Condition Expression field.
Condition Expression	Allows for **AND**, **OR**, and **NOT** conditions using the trigger conditions (Label) from the Add section. Using the Label field that corresponds to the entries in the Add section, you can combine the conditions into more complex expressions. The Condition Expression field could state, for example (Condition1 AND Condition2) OR (Condition3 AND Condition4) OR Condition5. Condition Expressions adhere to AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions. When the Condition Expression field is empty, the row entries are treated as OR conditions. Only one of the conditions must be met.

To clone a trigger condition:

To save some time, you can clone a trigger condition and then edit as appropriate.



[1] As you type in the field, one or more matches for the term are found and immediately presented.

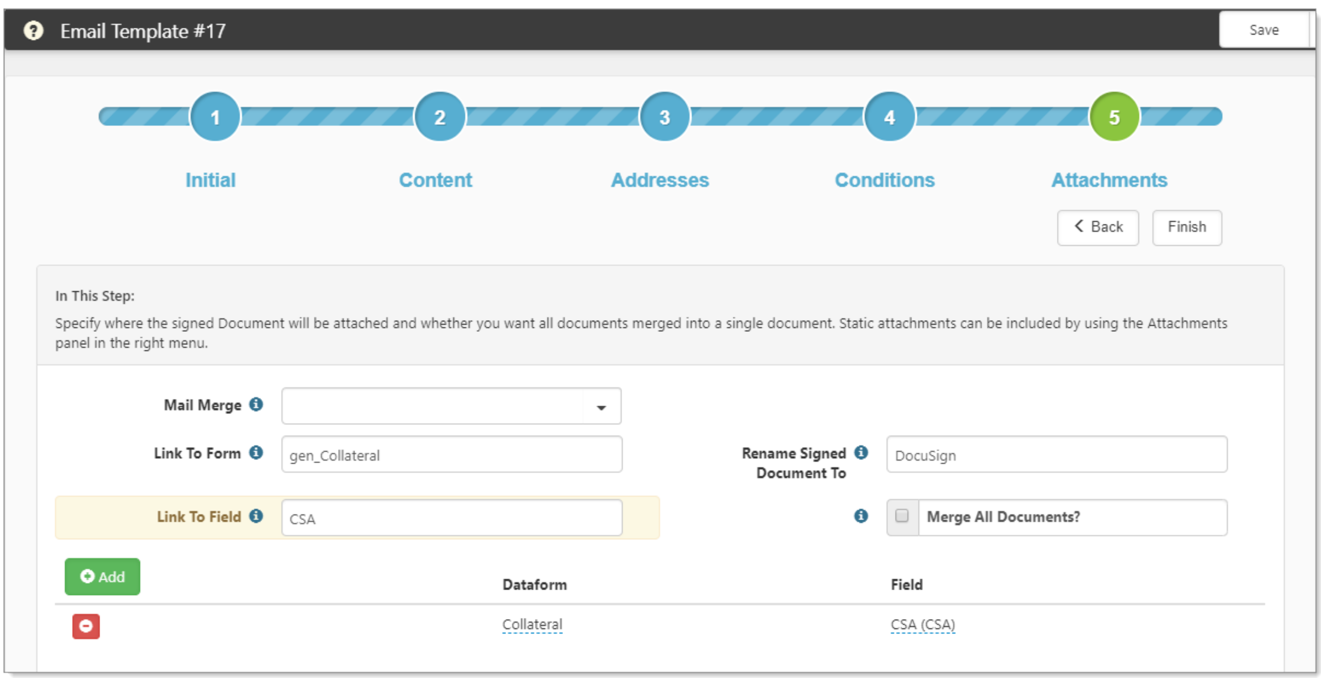
1. In the **Add** section, locate an entry that you want to copy.
2. Click **Clone**.
   A new row opens, with the trigger condition copied. Source, Field, and Operator are copied.
3. You can now edit the new condition as appropriate.
4. Click **Apply** or **Save**.
5. Click **Next** to proceed to Step 5: Attachments.

Step 5: Attachments

This is where you tell ClientSpace which files to send to DocuSign. You can point to files from multiple fields, and when ClientSpace sends it to DocuSign, it combines all into one document. You have the option to Merge All Documents, so when the documents are pulled back into ClientSpace, they can come in as one big file – and put it in Link To Field. The DocuSign functionality runs business logic on the destination dataforms where the files are returned completed and the signed file is pinned as a new version in the field.

If you are using the Attachments feature to include additional documents (multiples) in an envelope, it places the documents back in the field from which they came when the process completes. It is possible to pull them back out as separate documents. When we do this, we place the completed doc in the field from which it was retrieved.

To assist in generating the merge files to prepare to send to DocuSign, the **_GenerateMergeFile** business rule can be configured to run the merge document and deposit the file in a field. This business rule can be configured multiple times to generate each file needed. After the business rules are run, you can review the documents in their individual file fields before you click the workflow link to send the files to DocuSign for signatures.



To complete the Attachments step:

1. Complete the form.

Mail Merge	The options in this fields are Merge Admin records where merge templates have been uploaded. When you select a merge in this field, it tells the system to run the merge document and send it at the same time. You can view or edit the merged file before sending to DocuSign. The merge and send occur immediately after the clicking Send to DocuSign. Typically, you would set up another Email Template to also notify users or the client that a DocuSign email is coming.
Link To Form	After the document is signed, it can be returned to the system and attached to this form. This is where your returned file is placed. Use the table code name. For example, for Collateral, type **gen_ Collateral**. To find the table code name, go to Dataform Admin, Dataform Properties, and navigate to the Table Name. Find the Table Name and select the Table Name code.
Rename Signed Document	During the process that links the signed document to a form, the document can be renamed. Use this value to prepend the document name with an identifying tag, such as DocuSign Completed. Renamed files are Mail Merge files, or if you are merging all docs when in the Attachments tab, Merge All Docs is selected. If you are not using a mail merge and only using attached files from fields that are not being merged into one file, those files are not renamed to the Rename Signed Document value when they return from DocuSign. By default, the files are prepended with COMPLETED_ when they return signed.
Merge All Documents?	Select this option if you want all signed and attached documents to be merged into a single document. When you select this option, it puts the merged document into the Link To Field.
Link To Field	You can optionally select a file upload field on the Link To Form into which to save the document. Use the field code name. To find the field code name, go to Dataform Admin, Dataform Properties, and navigate to Fields. Find the field and select the Field Name code.

	If you do not provide a Link To Field value, the files will go back to the individual fields from which the originated (in the Add rows).
Add	In the Add rows, specify the fields where ClientSpace retrieves the file for DocuSign. You can specify files from multiple fields, and when ClientSpace sends to DocuSign, the files are combined into one document. The example (screenshot) shows the Dataform selection is *Collateral*, and the Field is *CSA*. 1. Click **Add**. A row opens. 2. For **Dataform**, select the dataform where the file resides. 3. For **Field**, select the dataform field where the file resides.

2. Click **Save**.
   You are returned to the Email Templates list.
3. For the new Email Template, select the **Published** option.

What's next?

If you edited the merge template (Word document) from the time the original file was uploaded, then you must upload it again. See Uploading the merge template. Now you are ready to proceed to the next step, testing the tags. Go to Testing the merge document.

Testing the merge document

The next step is to run a test with the merge document to review your tags. Most likely, you will need to add a link to the Client Master or the targeted dataform to run the merge document.

Configure the Reports link

Let's add a link for testing the merge document. It displays in the Action Center > Reports pane.

To configure the link:

1. Go to **System Admin** ⚙ > **Advanced** > **Custom Links**.
   The Configure Links dashboard opens.
2. Click **Add**.

The Configure Links Detail form opens.

3. Complete the form.

Location	Select **Client Master**.
Display Value	Enter your link name. This is how the link will display in the Action Center > Reports pane. For example, our CSA document has DocuSign tags that we want to review. We added a link named CSA.
Group	Select **Report**. This denotes the type of link you are creating and drives the other fields on the form.
Display Action	Select **Run Report**.
Report/Merge	Select **CSA**.

4. Click **Save**.

Test the merge

Now let's test the merge document.

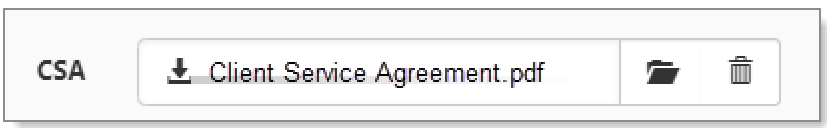
1. Go to the Client Master for your targeted client.
2. In the **Action Center** toolbar, click (**Reload**).
3. In **Action Center** > **Reports**, click **CSA**.
   The merge process executes, and when done, the file is downloaded.
4. Open the file and review the tags.
5. After you confirm the tags are correct, in your merge template (a Word doc in our example), change the font color to white. This prevents the tags (D1, S1, T1, for example) from showing on the signed document. DocuSign can still read the tags.
6. If you changed the merge document (font color or any other changes), you must upload the merge template file to the Merge Admin again.
7. To test the merge document again, go to a Workspace and run the Reports link to view the outputted merge file. We covered that process in an earlier step: Uploading the merge template.

Uploading the merge file

On our Collateral dataform, the Email Template is configured to take the merge file from the CSA field. So, the next step is to upload the merge file to the CSA field. In our example, the merge file is named Client Service Agreement.pdf.

To upload the file:

1. From the open Client Master, jump to the Workspace. In the **Action Center**, in the toolbar, click (**Go to Workspace**).
2. In the **Action Center**, in **Links**, click **Collateral**.
   The Collateral form opens.
3. In **CSA**, click (upload).
   The Upload File dialog box opens.
4. Click **Choose File**.
5. Locate your merge file and click **Open**.
   You are returned to the Upload File dialog box.
6. Click **Save**.
   The merge file name displays in the CSA field.



Sending to DocuSign

Now you are ready to send your document to DocuSign. However, before you send, let's check to see if the required scheduled processes are active.

Are the scheduled processes active?

The following scheduled processes must be active before you send the document:

- DocuSign Get Docs Status
- DocuSign Request Signature

Active entries are available when you view the Schedule Process Admin list. Additionally, review the schedule for these processes to determine if the frequency is appropriate.

	Name ↑	Schedule	Days	Next Run Date	Last Run Date	Running	Last Result	Last Run (sec)	Queued
	DocuSign Get Docs Status	Every 20 minutes	Su, Mo, Tu, Wed, Th, Fr, Sat	05/15/2020 3:25PM	05/15/2020 3:05PM	No	0	0	No
	DocuSign Request Signature	Every 1 minute	Su, Mo, Tu, Wed, Th, Fr, Sat	05/15/2020 3:14PM	05/15/2020 3:13PM	No	0	0	No

To review the scheduled process status:

1. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
2. If the processes are not listed, open **More**, select **All**, and click **Search**.
   The list displays active and archived entries. Archived entries are bold and italicized.
3. If the processes are NOT active, please log an Extranet case for assistance.

To review the schedule:

1. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin dashboard opens.
2. Open the entry (click Jump).
   The form opens.
3. Review the Frequency, Frequency Type, and Valid Days.
4. For any changes, please log an Extranet case for assistance.

You might want to consider setting:

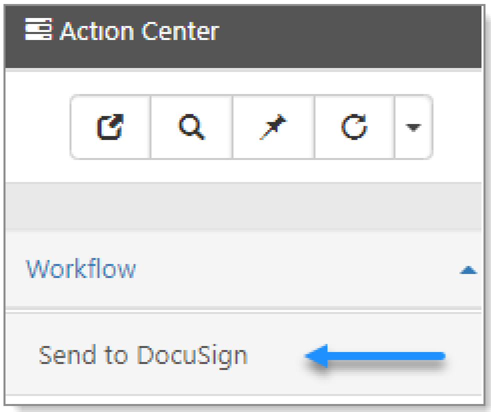
- DocuSign Request Signature to run every 1 minute.
- DocuSign Get Docs Status to run every 5 minutes.

Send to DocuSign

After you have confirmed that the scheduled processes are active, you are ready to send the document.

To send to DocuSign:

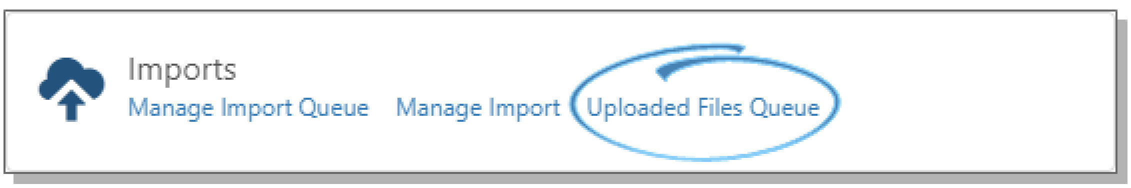
1. From the **Client Master**, in the **Action Center** > **Workflow**, click **Send to DocuSign**.



2. Next, you are ready to monitor the Uploaded Files Queue to see the documents that were sent and their status. Go to Viewing document status in the DocuSign process.

Viewing document status in the DocuSign process

The Uploaded Files Queue Dashboard provides insight into where your document is in the DocuSign process and is updated automatically from the DocuSign Get Docs Status scheduled process. The Uploaded Files Queue is a link on the Imports tile in System Admin. If there is an active DocuSign record, the Uploaded Files Queue is visible on the Imports tiles. Otherwise, it is hidden.

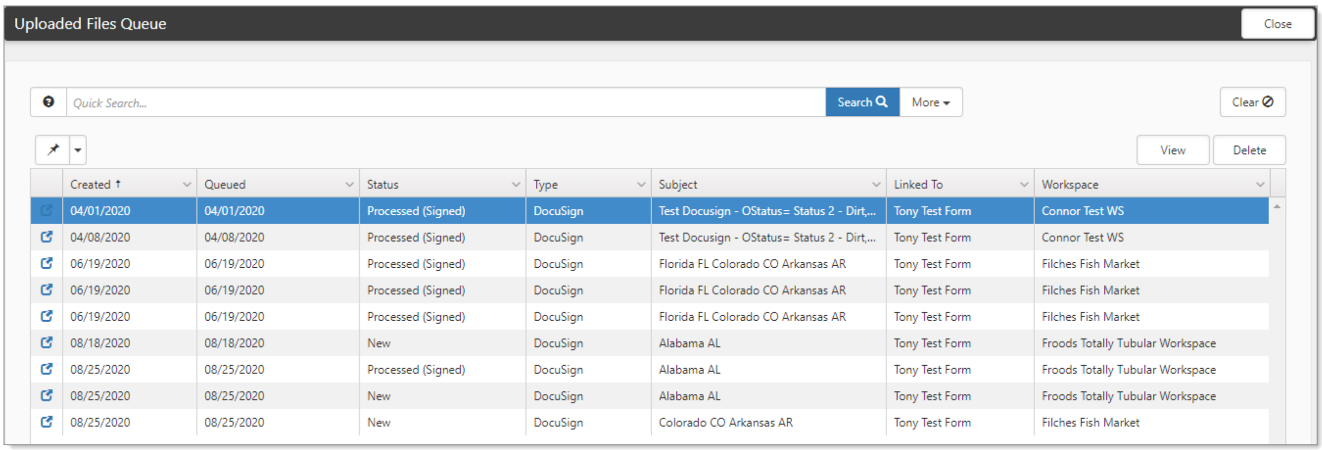


- The Uploaded Files Queue records initiate with a Status of New.
- If the files cannot be sent to DocuSign, the Uploaded Files Queue displays a Status of CS Failure.
- If the document fails to upload, you can reset the Status back to New (see To reset the status of failed documents:).
- When a DocuSign required tag is missing from one of the files, additional information is displayed in the Uploaded Files Queue record.
  - When this occurs, you must re-run the merge file, upload the correct file to the field, and trigger the Send to DocuSign again.
  - After the DocuSign Request Signature scheduled process runs, the Uploaded Files Queue Status changes to Out for Signature.

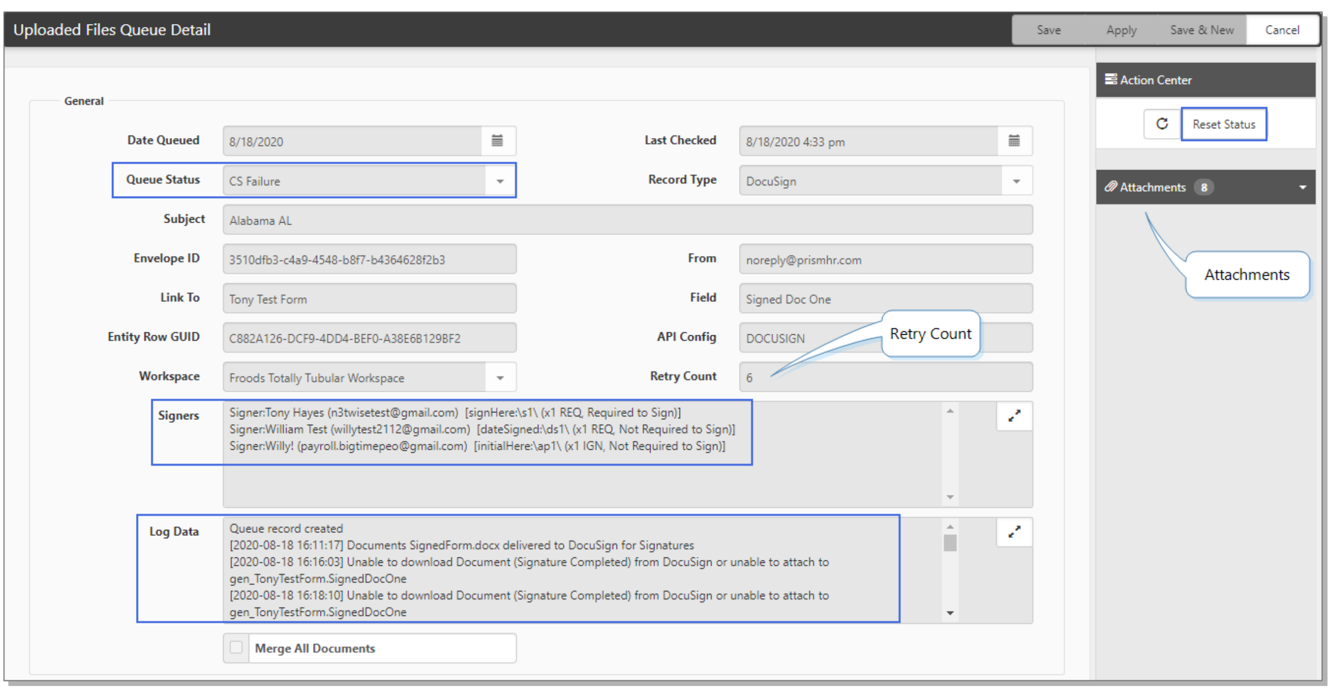
- Additionally, you can create a workflow to notify users when signed documents come back into ClientSpace.

To access the dashboard:

1. Go to **System Admin** > **Imports** > **Uploaded Files Queue**.
   The Uploaded Files Queue dashboard opens. From here, you can search, view, and delete entries.



2. Select an entry and click **View**. Alternatively, you can **(Jump)** to the record from the row entry.
   The Uploaded Files Queue Detail page opens. The page is read-only.



To view signed and unsigned files attached to this record:

3. Click **Attachments**.

Queue Status	Displays the current status in the DocuSign pipeline.
Signers	Displays a list of signers and associated email addresses who received the DocuSign item along with the requested action for them to take.
Log Data	Presents detailed information about the DocuSign process.

To reset the status of failed documents:

For failed documents, you can reset the Status back to New using Reset Status, which is only available when Status equals CS Failure.

1. On the Uploaded Files Queue dashboard, failed entries show Status as **CS Failure**. Locate the failed entry and click (**Jump**).
   The Uploaded Files Queue Detail page opens. Retry Count reflects the number of times the system attempted to get the document.
2. In the **Action Center**, click **Reset Status**.
   The Queue Status resets to New, and the Retry Count is set to 0 (zero).

Notifying users of status

DocuSign user notifications can occur through a workflow when a file has returned, or a system email template when a DocuSign call fails.

System Email Template - Failure

ClientSpace users are notified when a DocuSign call fails through the System Email Template, **DocusignFail**. The template sends a notification to the Created By user on Insert or Update when the Status equals CS Failed and includes the Log Data from the related Uploaded Files Queue record. The email template is Active by default.

Workflow

You can create a workflow to notify users when a file has returned to ClientSpace. Use the following HrdActions in the Workflow:

- DOCUSIGN_COMPLETED indicates the signing process completed.
- DOCUSIGN_DECLINED indicates the process was declined by a signer.
- DOCUSIGN_VOIDED indicates the process was voided (canceled).

When creating your workflow:

1. In Step 1 Channel, set the following:

Execution Pipeline	Select **DocuSign**.
Triggering Form	Select the form to which the completed files are uploaded. In our example, we used the Collateral dataform.
Field	Select **HdrAction**.
Value	In Value: 1. Select **Other Value**. The Header Action Value dialog box opens. 2. In **Value**, type one of the following: ■ DOCUSIGN_COMPLETED ■ DOCUSIGN_DECLINED ■ DOCUSIGN_VOIDED 3. Click **Ok**.

2. For more details on creating a Workflow, see Configuring your workflow.

Voided documents

The DocuSign process handles voided documents, allowing the user to void a document that has already begun processing through the DocuSign system. The document is voided by using a rule on a workflow. The rule changes the status to Voided. This approach is a reactive measure to voiding documents.

You can void documents using the following business rules:

- The biz rule (core) **_VoidDocuSignDocument** updates the Uploaded Files Queue record status to **voided**.
  - The scheduled process DocuSign Request Signature voids the envelope(s) in DocuSign.
  - The Scheduled process DocuSign Get Docs Status retrieves any voided documents. It attaches to the dataform if configured to attach (otherwise, the voided document is attached only to the Uploaded Files Queue record).
- A soft error (core) **_SE_VoidDocuSignDocument** warns the user that documents (envelopes) will be voided. This rule also identifies the number of envelopes that are affected.

Both rules are configurable with the following parameters:

- **DataformOnly** (option). When selected, it only voids envelopes (and thereby documents) associated with the Dataform on which the rule is configured. When cleared, voids all envelopes in the Workspace associated with the Dataform on which the rule is configured.
- **AllowVoidStatus** (comma-delimited string). Provides the status of Uploaded Files Queue records that can be voided. See the Signature Status lookup group for valid statuses and use the CODE in this parameter, separated by a comma, with no spaces.

As a preventive measure, your administrator can set an option (ExcludeVoidedFiles) in the DocuSign API configuration parameters to prevent voided documents from coming back into ClientSpace. See Configuring the API record.

CCMSI

ClientSpace provides a connection to the CCMSI API, which allows you to enter the data into ClientSpace and export it to CCMSI. ClientSpace correlates the Workers' Comp Claim data and exports it to CCMSI, providing the convenience of maintaining the data in one place.

> NOTE: You **must** be a CCMSI customer to use the API.

To get started, you need the following information from CCMSI:

- CCMSI Username
- CCMSI Password
- CCMSI secondary ID
- URL that points to your organization's API services on CCMSI

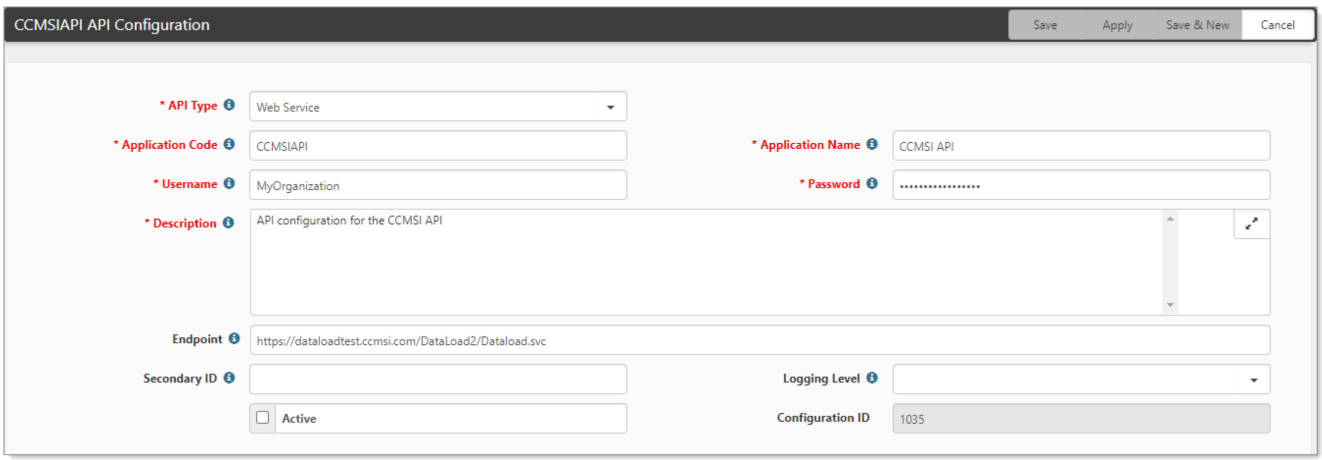
Topics in this section

Configuring the CCMSI connection

The following procedure guides you through configuring the CCMSI connection. First, configure the connection. Then, activate the CCMSI links for the Comp Claim dataform: CCMSI Location Number, CCMSI Member Number, CCMSI Initial Report, and Submit to CCMSI.

To configure the API:

1. Go to **System Admin** > **Advanced** > **API Configuration**.
   The API Configuration dashboard opens.
2. Highlight the row for **CCMSIAPI** and double-click or click (**Open**).
   The CCMSIAPI API Configuration form opens.



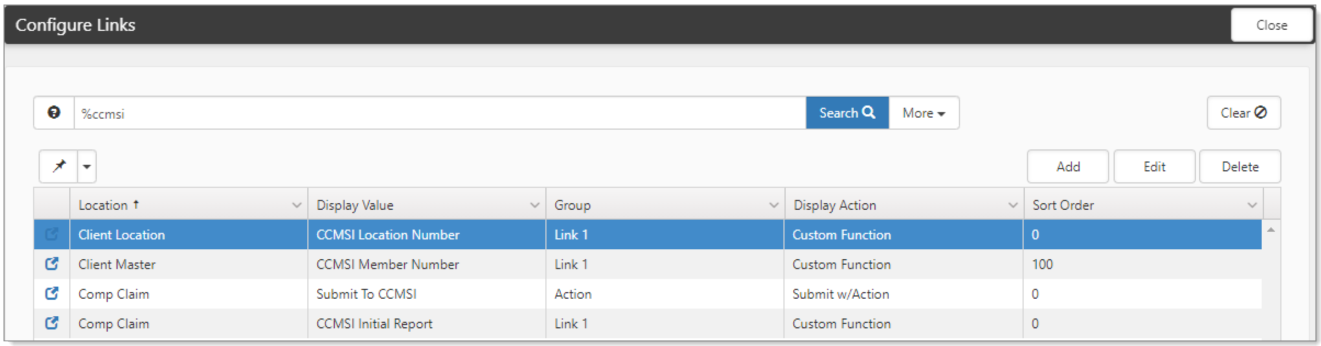
3. Complete the following fields:

Username	The organization CCMSI username.
Password	The organization CCMSI password.
Endpoint	The URL that points to the API services for your organization. This is specific to each client.
Secondary ID	The organization CCMSI member number. This is the client identifier, which is part of the authenticator object – the Username and Password, specific to each client, is related to the Secondary ID.

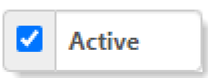
4. Click **Save**.

To activate the links:

1. Go to **System Admin** > **Advanced** > **Custom Links**.
   The API Configuration dashboard opens.
2. Filter the list to search for CCMSI, using **%CCMSI**.
   The filtered list displays showing four entries. From here, open an entry and activate the link.



3. For each entry, open and select the **Active** option.



4. Click **Save**.

To confirm the business rule SubmitClaimToCCMSI is active:

1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. Search for SubmitClaimToCCMSI and open the rule.
   The Rule Details form opens.
3. Select the **Active** option (if not already selected), and click **Save**.

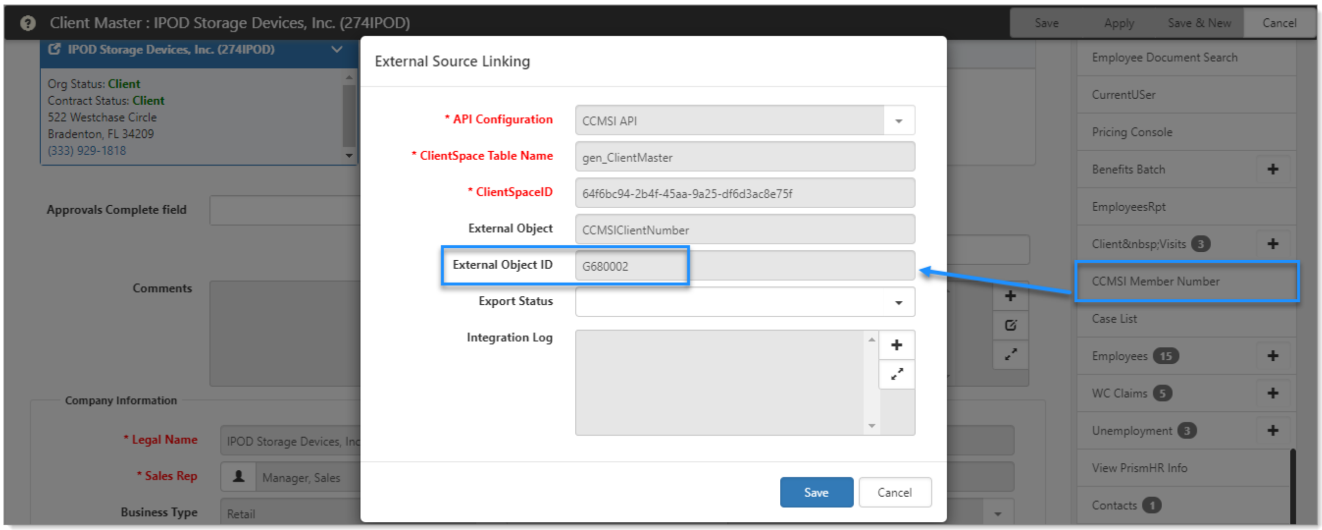
Member Number and Location Number

You must provide the CCMSI Member Number and CCMSI Location Number to successfully transmit data from ClientSpace to CCMSI. This is performed from links on the Client Master and the Client Location.

If any of these data points are missing, on the Comp Claim, you will receive a hard error when you click the **Submit to CCMSI** link. If the Comp Claim cannot be submitted to CCMSI for any reason, the CCMSI Initial Report link on the Comp Claim will display the failed error with details.

To enter the CCMSI Member Number:

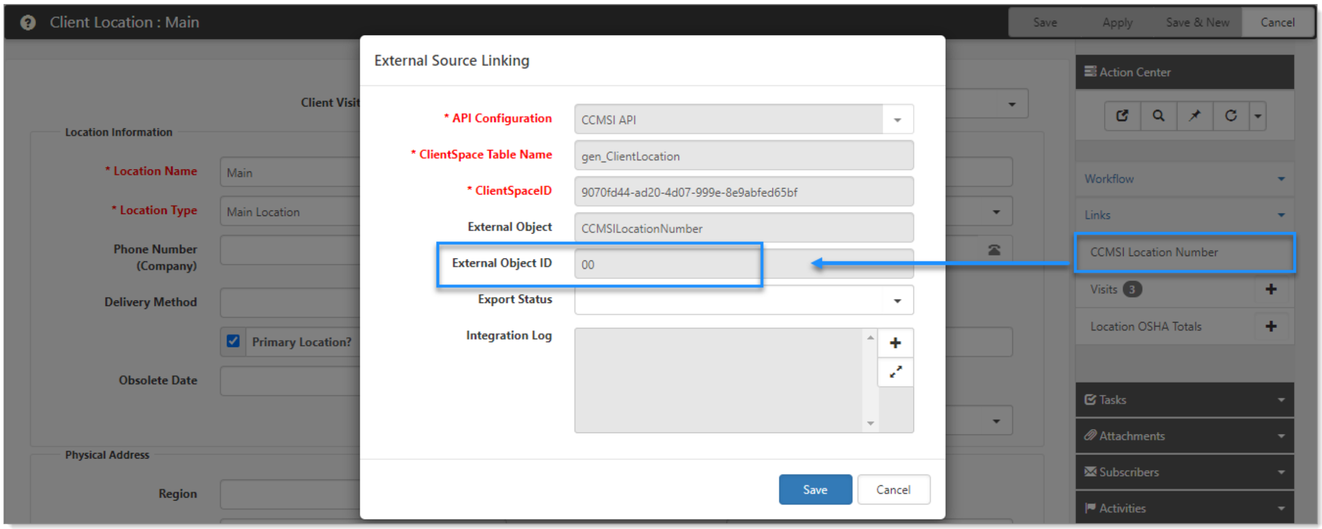
1. Open the Client Master.
2. In the **Action Center**, expand **Links** and click **CCMSI Member Number**.
   The External Source Linking dialog box opens.
3. In **External Object ID**, enter the CCMSI Member Number.



4. Click **Save**.

To enter the CCMSI Location Number:

1. Open the Client Location dataform.
2. In the **Action Center**, expand **Links** and click **CCMSI Location Number**.
   The External Source Linking dialog box opens.
3. In **External Object ID**, enter the CCMSI Location Number.



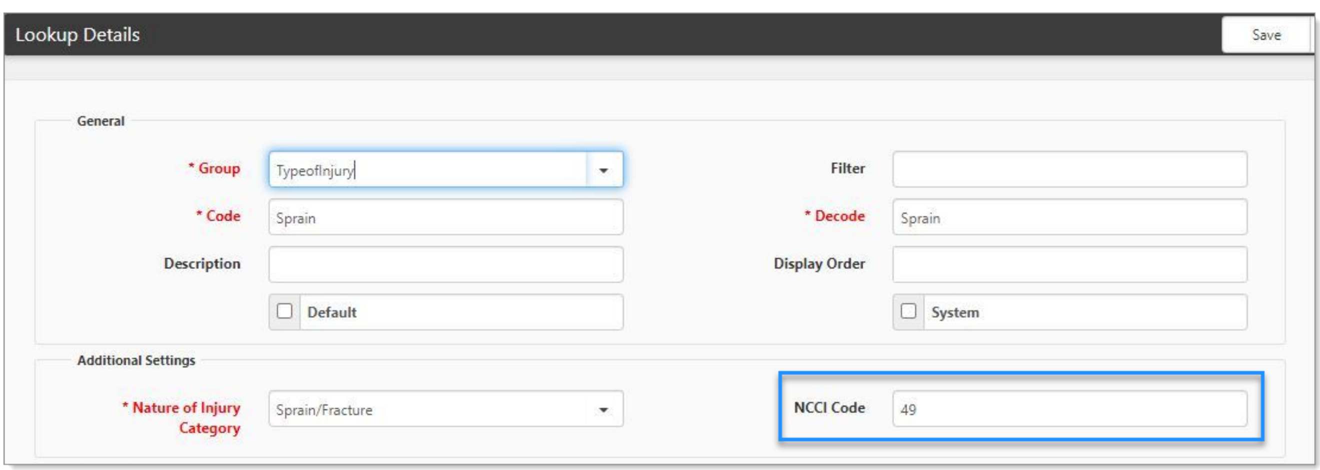
4. Click **Save**.

CCMSI lookups

To send injury cause, nature, and body part data to CCMSI, additional configuration is needed. On the following Comp Claim Injury field lookup values Additional Settings should be configured with the NCCI Code value.

- Cause of Injury (AccidentCause lookup group)
- Nature of Injury (TypeofInjury lookup group)
- Injured Body Parts (InjuredArea lookup group)

Lookup values must have the NCCI Code that matches the code value required by CCMSI.

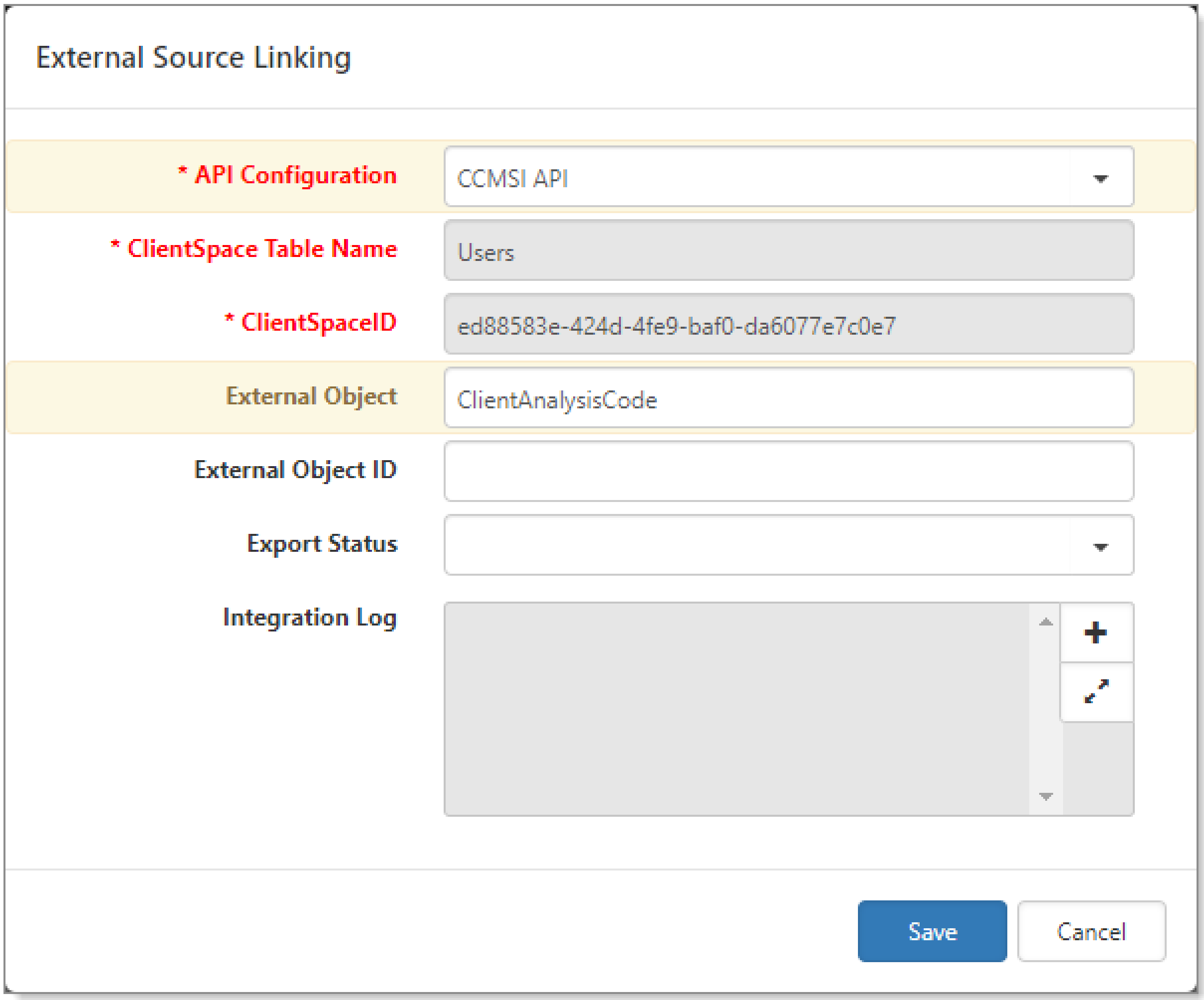


CCMSI client analyst users

Users who are client analysts in CCMSI must have an External Source Linking record created on their ClientSpace User Profile.

To add the user's ClientAnalysisCode:

1. In ClientSpace, open the user's User Profile.
   The User Details form opens.
2. On the **Action Center** toolbar, click (**More Options**) and select **External Source Linking**.
   The External Source Linking dashboard opens.
3. Click **Add**.
   The External Source Linking dialog box opens.



4. Complete the fields.

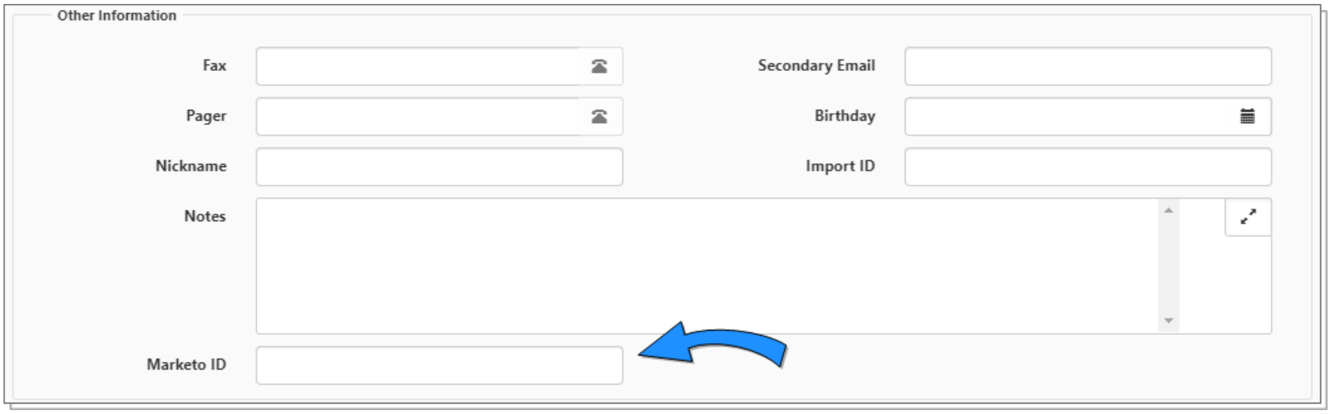
API Configuration	Select **CCMSI API**.
External Object	Type **ClientAnalysisCode**.
External Object ID	Enter the user's CCMSI code.

5. Click **Save**.

Marketo

Marketo provides marketing automation and lead management software for B2B marketers. The ClientSpace API integrates with Marketo to push contact information into the Marketo system. The

ClientSpace contact records are stamped with the Marketo ID, enabling information synchronization between the applications using a scheduled process. A Marketo ID field is on the ClientSpace Contact form, in the Other Information fieldset.



PlanHub

PlanHub allows you to create instant, customized 401k cost comparison proposals for your clients and prospects, as well as to enroll your contacts into an automated email campaign to nurture them towards sales-readiness with the value of the 401k at the forefront. For more information about PlanHub, see their website.

Why do I care about this?

With the ClientSpace PlanHub integration, you can request a Slavic 401k PlanHub proposal from within ClientSpace – offering you an integrated solution. From ClientSpace, you can create instant, customized 401k cost comparison proposals for your clients.

What does it do?

The ClientSpace PlanHub integration passes the prospect's FEIN to Slavic401k, and if successful, a PDF version of the PlanHub proposal is received and uploaded to the Slavic PlanHub dataform. When the PlanHub proposal is received, it can trigger established workflows to notify individuals for any additional next steps.

Procedure overview

To integrate the PlanHub proposal, you must work with ClientSpace Professional Services. For assistance, log an Extranet case. The following table lists the tasks and responsible group for implementing the ClientSpace PlanHub integration.

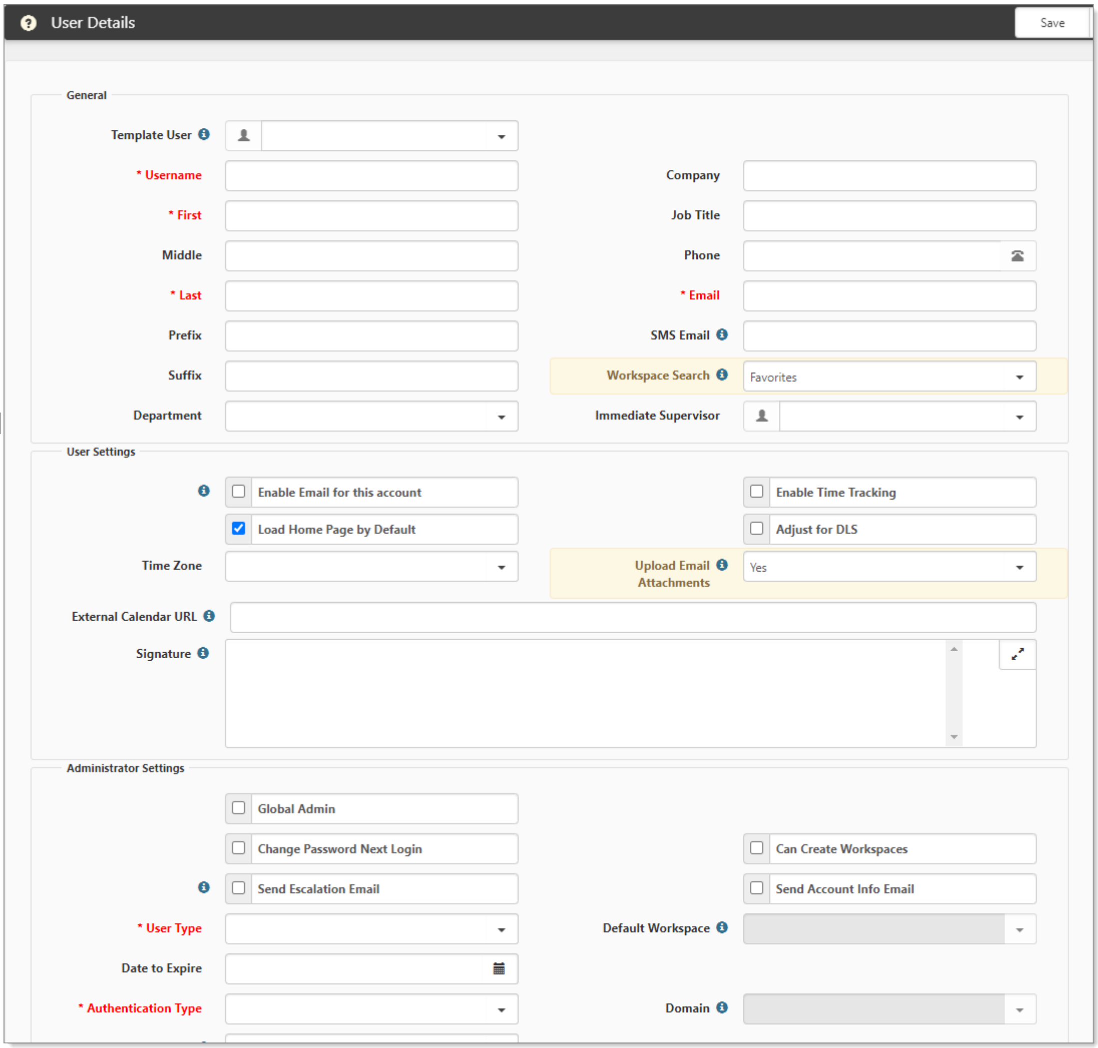
Task	Who performs this task?
Set up the API configuration	Professional Services
Enable the business rules	Professional Services
Enable and configure the scheduled process	Professional Services
Review the PlanHub dataform security	Client
Configure the Client Master links to PlanHub	Available in the application. May be enabled by Professional Services.
Identify and set up the workflow processes	Client
Demonstration	Professional Services

Chapter 20

Security

Administering security rights is an important part of any business. The following topics will help you get started with securing ClientSpace to match your organization's current security model.

Adding and editing user accounts



All ClientSpace users have a user profile. For some clients, the user profile automatically imports from PrismHR or Salesforce. And administrators can manually add user profiles. The user profile record contains the username that you use to access ClientSpace, along with a few identification fields, such as Name, Department, Job Title, Phone, and Email. Additionally, the user profile has a few administrative and out of office settings.

You can edit your user profile for some demographic information, enable out of office notifications, and add modules to the topmost banner bar. Administrators perform other edits, such as role assignments and managing licenses. Roles control user access (view, add, edit, delete, and admin) to various entities. And licenses determine the available ClientSpace modules.

This topic guides you through adding and editing a user account.

To add or edit a user account:

1. Go to **System Admin** ⚙ > **Users**.
   The Users dashboard opens.
2. To add a user account, click **Add**.
   The User Details form opens.
3. To edit a user account, highlight the row and click (**Open**) or **Edit**.
   The User Details form opens.
4. Complete the form.

Fieldset	Field	Description
General	Template User	From the list, select a user account to auto-fill values for the account you are adding. The following values are auto-filled from the selected template user: • Department • User Type • Company • Can Create Workspaces • Workspace • Modules • Security
	Username	Required.
	Company	Auto-filled when using a Template User.
	First, Middle, Last	Required: First and Last.
	Prefix, Suffix	Provide appropriate prefix or suffix to the account. Optional.
	Job Title	Type the user's job title.
	Phone	Type the user's phone number. You can call the user directly from ClientSpace by clicking the phone icon.
	Email	Required. When you change an Active user to

Fieldset	Field	Description
		Inactive, the user's email is also inactivated to ensure that system emails are not sent to inactive user accounts. If an account is re-activated, the inactive status is removed from the email address.
	SMS Email	Used for Two Factor Authentication Notification.
	Department	Auto-filled when using a Template User. Select a department from the list.
	Workspace Search	Auto-filled when using a Template User. For Internal users, sets the Search Type for the Workspace Widget.
	Immediate Supervisor	Select a user from the list.
User Settings	Enable Email for this account	Default is enabled. Enables email notifications to external email, such as Gmail or Outlook.
	Enable Time Tracking	When selected, this setting displays the Time Tracker panel on dataforms that allow Time Tracking for this user.
	Load Home Page by Default	Default is enabled (selected).
	Adjust for DLS	Adjust the clock for daylight savings time (DLS).
	Time Zone	Select the user's time zone.
	Upload Email Attachments	Default is Yes. Determines if attachments can be uploaded when attaching Activities from the Email Add-In.
	External Calendar URL	Exposes external calendar events on the ClientSpace calendar. Provide the URL to a shared calendar.
	Signature	Adds a custom signature message to Email Activities.

Fieldset	Field	Description
Administrator Settings	Global Admin	Select to establish the user with admin rights to ClientSpace.
	Change Password Next Login	Select this option to require the user to change their password on the next login.
	Can Create Workspaces	Select this option to allow the user to create workspaces.
	Send Escalation Email	Enables users to select whether to receive escalation notices for tasks in the system.
	Send Account Info Email	When this field is selected, the user receives an email with their username and login instructions.
	User Type	Auto-filled when using a Template User.
	Default Workspace	Available when User Type = External. Determines the workspace an external user will be directed to after logging in.
	Date to Expire	Set a date to expire the user account.
	Authentication Type	Auto-filled when using a Template User.
	Domain	This field is available when Authentication Type = Active Directory. Select an Active Directory Domain for this user.
	Reporting Profile	Auto-filled when using a Template User. Used for Business Intelligence reports. See Configuring security in Business Intelligence reporting.
	Notes	Auto-filled when using a Template User.
Out of Office	Enable Out of Office	Default is disabled. When you select this option, the other fields in the fieldset become available.
	Back Up User	Required when Enable Out of Office is

Fieldset	Field	Description
		selected. Select the user account to receive notifications on behalf of the primary user while the primary user has the Out of Office settings enabled. Notifications are sent for the time range specified by Start Date and End Date.
	Start Date	Required when Enable Out of Office is selected. Select a start date for the out of office notifications.
	End Date	Required when Enable Out of Office is selected. Select an end date for the out of office notifications.
Active		Default is Active. • When selected, the user profile is active. • When cleared, the user is inactive. When you change an active user to inactive, the user's email is also inactivated to ensure that system emails are not sent to inactive user accounts. If an account is re-activated, the inactive status is removed from the email address.

5. Click **Save**.

Learning how: Assigning User Templates

View the video Assigning User Templates.

Managing user licenses

Licenses serve several purposes for Global Administrators:

- Determine which areas of ClientSpace are available by user.
- Determine if the advanced admin features, for example, Dataform Admin are available.
- Provide easy visibility into knowing which users are subject to additional billing.

ClientSpace supports several add-on modules: Sales, Risk, Implementation, and Human Resources. Licenses enable users to access specific modules. For users that need access to all modules, add them to the Enterprise License. ClientSpace base features, such as Workflows, Cases, and Client Visits, are always included, and a license is not needed.

Update licenses when

It's important to consider updating Licenses when:

- adding a new user
- a user's responsibilities have changed
- a user leaves your company

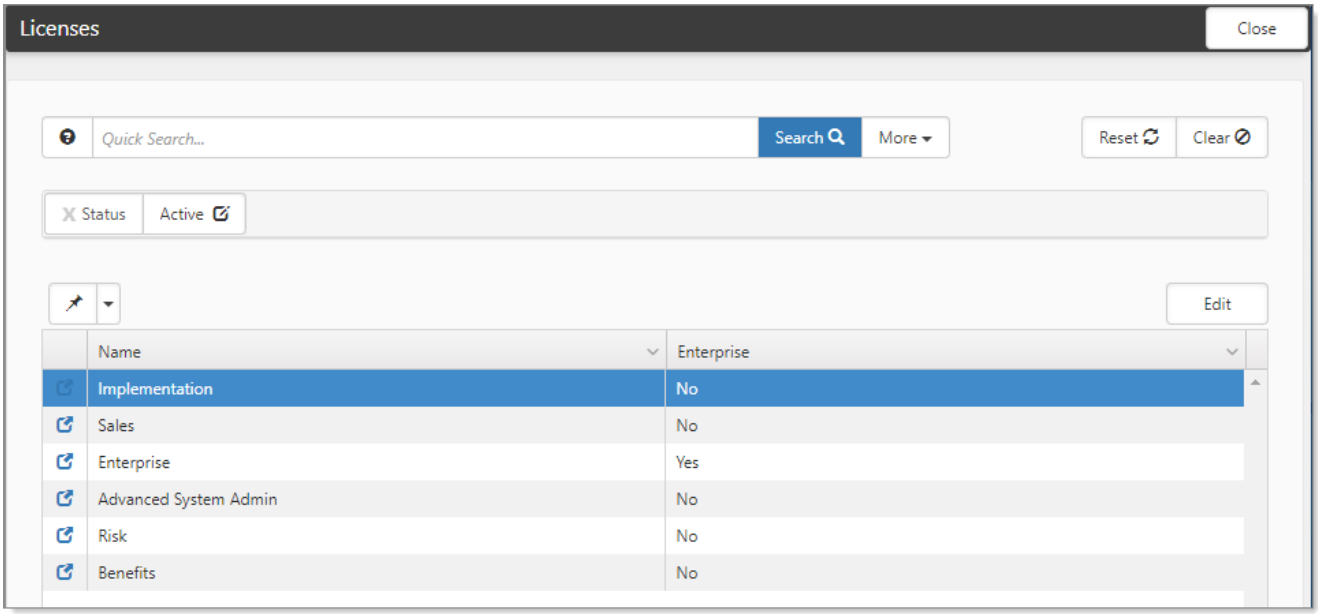
The process is simple.

Licenses and user templates

When you apply a Template to a User, the Licenses on that Template are also added to the User. Any existing licenses on the User Profile remain.

To manage user licenses:

1. Go to **System Admin** ⚙ > **Licenses**.
   The Licenses dashboard opens with a list of licenses that are available to your company.



2. Select a license and click (**Jump**) or **Edit** to open. If a License is unavailable, log an Extranet case.
3. In the **Action Center**, click **Users**.
   The License Users dashboard opens.
4. To add a user to the selected license, click **Add**.
   The Add Users dialog opens.
5. Select a user from the list. Repeat to add more users.
6. Click **Ok**.
   The newly added user displays in the list. **Note**: Expired users show on this list. However, inactive users are not displayed.
7. To remove users, from the License Users list, click **Remove**.
8. Respond to the prompt "Are you sure you would like to delete this row?" by clicking **Yes** or **No**.
9. Click **Close** when complete.

To find out what licenses a user has:

1. From the **License** dashboard, select **More**.
2. In **Name**, select a user.
3. Click **Search**.

The list of licenses for the selected user displays.

Note: Expired users are still considered active users. Remember to inactivate these users or remove their licenses to avoid ongoing licensing costs.

Managing licenses in user profiles

Global Administrators can add and remove licenses directly from the User Details form. Only Global Administrators can access the License panel.

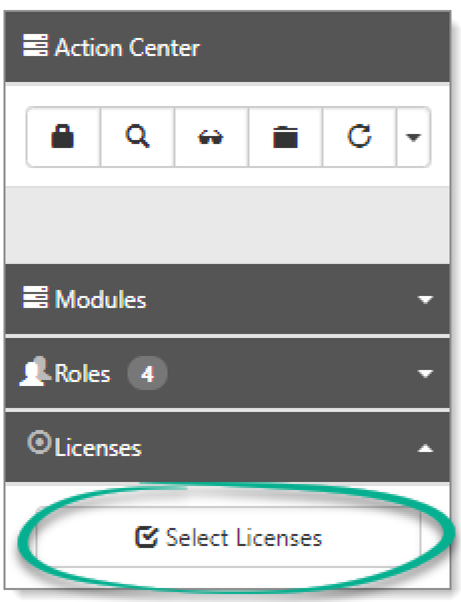
It's important to update Licenses when:

- adding a new user
- a user's responsibilities have changed
- a user leaves your company

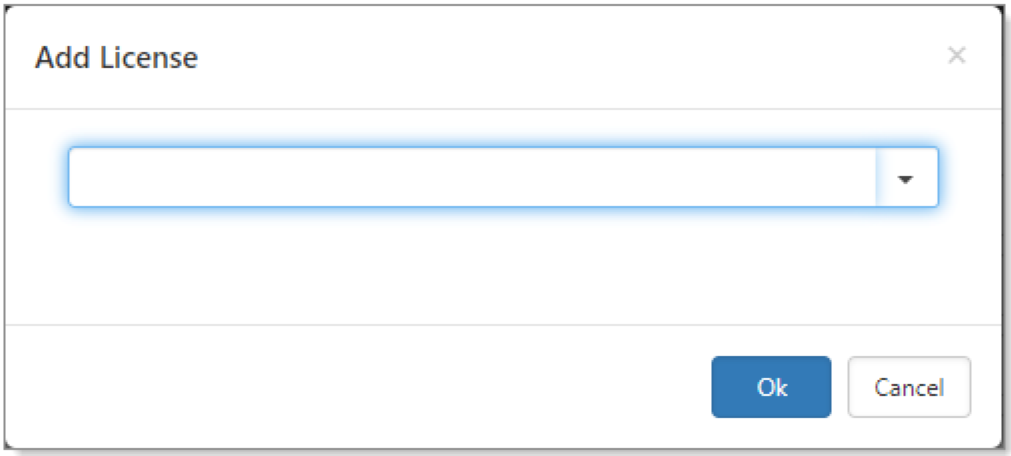
When you clone a user, their licenses apply to the new user profile.

To manage licenses in the user profile:

1. Go to **System Admin** > **Users**.
   The Users dashboard opens.
2. Locate and select the targeted user.
   The User Details form opens.
3. In the **Action Center**, select **Licenses** > **Select Licenses**.



   The Add License dialog opens.



4. Select a license from the list. You can select multiple licenses. If a License is unavailable, log an Extranet case.
5. When finished, click **Ok**.
   The newly selected license displays in the License pane of the Action center.
6. Click **Save**.

Managing User Modules

Global Admins can quickly add multiple users to a module without opening and updating each user. The Global Admin can select users associated with the roles attached to a module. Adding users in this way adds the module to the selected user's module list. The next time the user logs in to the system, the added module will appear in their modules bar.

To add multiple users to a module:

1. Go to **System Admin** > **Modules**.
   The Modules dashboard opens with a list of modules.
2. Select a module and click (**Jump**).
   The Module Details form opens.
3. In the **Action Center**, click **Users**.
   The Module Users dashboard opens.
4. Click **Add**.
   The Add Users dialog box opens.
5. Select a user and click **Ok**.

The selected user displays in the Module Users list.

6. Click **Close**.

Configuring your ClientSpace authentication settings

Application security, password settings, and account lockouts are configured in Authentication Settings. Global admins can administer password and two factor authentication settings.

Password settings

Passwords are required to access ClientSpace and are hashed with one-way encryption. The site uses 2048 SSL encryption. When the password is changed, the system records the time and date of this event in the DatePasswordSet field on the User table. The system can then be optionally set to run a scheduled process regularly to check the current date against this field and require the user to reset the password if it exceeds a set threshold. Security configurations are stored in an Install Security table within the database.

Password and account security options are as follows:

- Minimum password length (default is 7 characters)
- Password complexity (default requires at least two types of characters, such as alpha-numeric)
- Number of failed attempts before account lockout (default is 5 attempts)
- Lockout duration (default is 30 minutes)

Additionally, the system can be configured so that ClientSpace sessions timeout after a set amount of inactivity using the Session Expiration setting, essentially logging the user out of the system. When this occurs, the user receives a Session Expired message in the browser.

Two factor authentication settings

In the two factor authentication (2FA) fieldset, you enable and configure 2FA for your ClientSpace installation. The information is used to generate a code that is sent to users as a second form of authentication.

To access your settings:

1. Go to **System Admin** > **Security** > **Authentication Settings**.
   The Authentication Settings form opens.
2. In the **Password Settings** fieldset, configure the following settings:

Password Length	Minimum length of a user password.
Password Complexity	Minimum complexity of a user password (up to 3 levels). You can require up to 3 levels (of 4 options) of password complexity, which is stored in the Install Security table. The 4 options for password complexity are: • Letters required • Numbers required • Mixed Case (upper and lower) required • Special Characters required For help in configuring the password complexity, log an Extranet case. Support can help you configure the password complexity level of your installation for up to **3 levels of complexity**. The system then checks each of the complexity options and allows authentication if the password meets the required levels.
Password Reset	Amount of time in days from the last password reset before a user is forced to change password (unless **Password Never Expires** is selected).
Login Attempts before lockout	Number of failed login attempts before a user account is locked.
Lockout Duration	Amount of time in minutes before a locked user account automatically unlocks.
Session Expiration	Number of minutes of activity allowed before a session is automatically expired.

3. In the **Two Factor Authentication Settings**, configure the following settings:

Enable TFA	Select this option to enable two factor authentication.
TFA Valid Characters	The valid characters that are allowed when constructing the Authentication Code. Example: abcdefghijklmnopqrstuvwxyz1234567890
TFA Code Length	The length of the 2FA authentication code for the user.
TFA Code Expiration Minutes	Number of minutes after which the delivered Authentication Code expires.

TFA Code Expiration Days	Number of days after which the delivered Authentication Code expires.

4. Click **Save**.

For help or changes to these configurations, log an Extranet case.

Enabling user accounts for Two Factor Authentication

Enabling two-factor authentication for your ClientSpace installation redirects all your users to a login page for ClientSpace, regardless of their User Profile preference setting. If you have any questions about this or any other login function, log an Extranet case before making configuration changes.

Two-factor authentication (also known as 2FA) is a method of confirming a user's claimed identity by using a combination of two different components. ClientSpace 2FA uses the standard username and password combination as the first factor, and a generated code sent to the user at authentication time as a second confirmation factor.

For details on configuring your ClientSpace authentication settings, see Configuring your ClientSpace authentication settings.

To configure user accounts for 2FA:

1. Ensure that each user has a valid **Email** configured in their User Profile in ClientSpace.
2. For users who want to receive authentication information by text, ensure they have a valid **SMS Email** configured in their User Profile (see SMS Email formats).
3. If the user does not receive the authentication code in a timely fashion, check the configurations on the User Profile. Go to **System Admin** ⚙ > **Security** > **Authentication Settings**.
   The Authentication Settings form opens.
4. Complete the following fields:

TFA Code Length	The length of the 2FA authentication code that is generated for the user.
TFA Code Expiration Minutes	Authentication code expires after this number of minutes.
TFA Code Expiration Days	The number of days the 2FA Authentication code exists in the browser before automatic expiration and subsequent re-authentication of user. **Note**: If the user chooses the option to Delete Cookies when clearing their browser cache, the system

	cannot match the hashed codes and interprets this as an un-authenticated browser, prompting the user through the 2FA process.

5. After the system is configured, when a user logs in, the ClientSpace username and password is validated as normal. Then the system checks to see if the user has a current 2FA security cookie cached in their browser.
6. If the user does not have a valid 2FA cookie, the system:
   - Checks the user profile, and if the SMS Email is configured, attempts to send a 2FA authentication code to the configured email address (see SMS Email formats).
   - If SMS Email is not configured, the system sends an email to the primary Email of the user containing the authorization code.
   - After the user receives the authorization code, they can enter it into the security box, which creates a security token (system cookie) containing a hashed code separate from the session cookie created by logging in.
   - The cookie is checked against the current 2FA cookie stored in ClientSpace, and if the hashed codes match, the user is authenticated. The cookie lives in the browser for the length of time specified under System Admin > App Settings, at which point the cookie expires, and the user is prompted for 2FA again. **Note**: If the user chooses the option to Delete Cookies when clearing their browser cache, the system cannot match the hashed codes and interprets this as an un-authenticated browser, prompting the user through the 2FA process.
7. If you are logged into Outlook with the Outlook Add-In enabled, you must close and re-open Outlook to allow the Add-In access to the Two Factor Authenticated browser session. Failure to do so causes an authentication error when using the Outlook Add-In.

SMS Email formats

The following is a list of Cell carriers and their associated SMS email formats. Replace the string "10digitphonenumber" with the actual 10-digit phone number for your cell phone, by carrier (including area code). This list is provided by PrismHR as a courtesy and is only accurate as of the date of posting and is not maintained. If the SMS email format does not work for your carrier, please contact the service provider for the current email format.

3 River Wireless	10digitphonenumber@sms.3rivers.net
ACS Wireless	10digitphonenumber@paging.acswireless.com
Alltel	10digitphonenumber@message.alltel.com

AT&T	10digitphonenumber@txt.att.net
Bell Canada	10digitphonenumber@txt.bellmobility.ca
Bell Canada	10digitphonenumber@bellmobility.ca
Bell Mobility (Canada)	10digitphonenumber@txt.bell.ca
Bell Mobility	10digitphonenumber@txt.bellmobility.ca
Blue Sky Frog	10digitphonenumber@blueskyfrog.com
Bluegrass Cellular	10digitphonenumber@sms.bluecell.com
Boost Mobile	10digitphonenumber@myboostmobile.com
BPL Mobile	10digitphonenumber@bplmobile.com
Carolina West Wireless	10digit10digitnumber@cwwsms.com
Cellular One	10digitphonenumber@mobile.celloneusa.com
Cellular South	10digitphonenumber@csouth1.com
Centennial Wireless	10digitphonenumber@cwemail.com
CenturyTel	10digitphonenumber@messaging.centurytel.net
Cingular (Now AT&T)	10digitphonenumber@txt.att.net
Clearnet	10digitphonenumber@msg.clearnet.com
Comcast	10digitphonenumber@comcastpcs.textmsg.com
Corr Wireless Communications	10digitphonenumber@corrwireless.net
Dobson	10digitphonenumber@mobile.dobson.net
Edge Wireless	10digitphonenumber@sms.edgewireless.com
Fido	10digitphonenumber@fido.ca
Golden Telecom	10digitphonenumber@sms.goldentele.com
Helio	10digitphonenumber@messaging.sprintpcs.com
Houston Cellular	10digitphonenumber@text.houstoncellular.net
Idea Cellular	10digitphonenumber@ideacellular.net
Illinois Valley Cellular	10digitphonenumber@ivctext.com

Inland Cellular Telephone	10digitphonenumber@inlandlink.com
MCI	10digitphonenumber@pagemci.com
Metrocall	10digitpagernumber@page.metrocall.com
Metrocall 2-way	10digitpagernumber@my2way.com
Metro PCS	10digitphonenumber@mymetropcs.com
Microcell	10digitphonenumber@fido.ca
Midwest Wireless	10digitphonenumber@clearlydigital.com
Mobilcomm	10digitphonenumber@mobilecomm.net
MTS	10digitphonenumber@text.mtsmobility.com
Nextel	10digitphonenumber@messaging.nextel.com
OnlineBeep	10digitphonenumber@onlinebeep.net
PCS One	10digitphonenumber@pcsone.net
President's Choice	10digitphonenumber@txt.bell.ca
Public Service Cellular	10digitphonenumber@sms.pscel.com
Qwest	10digitphonenumber@qwestmp.com
Rogers AT&T Wireless	10digitphonenumber@pcs.rogers.com
Rogers Canada	10digitphonenumber@pcs.rogers.com
Satellink	10digitpagernumber.pageme@satellink.net
Southwestern Bell	10digitphonenumber@email.swbw.com
Sprint	10digitphonenumber@messaging.sprintpcs.com
Sumcom	10digitphonenumber@tms.suncom.com
Surewest Communications	10digitphonenumber@mobile.surewest.com
T-Mobile	10digitphonenumber@tmomail.net
Telus	10digitphonenumber@msg.telus.com
Tracfone	10digitphonenumber@txt.att.net
Triton	10digitphonenumber@tms.suncom.com

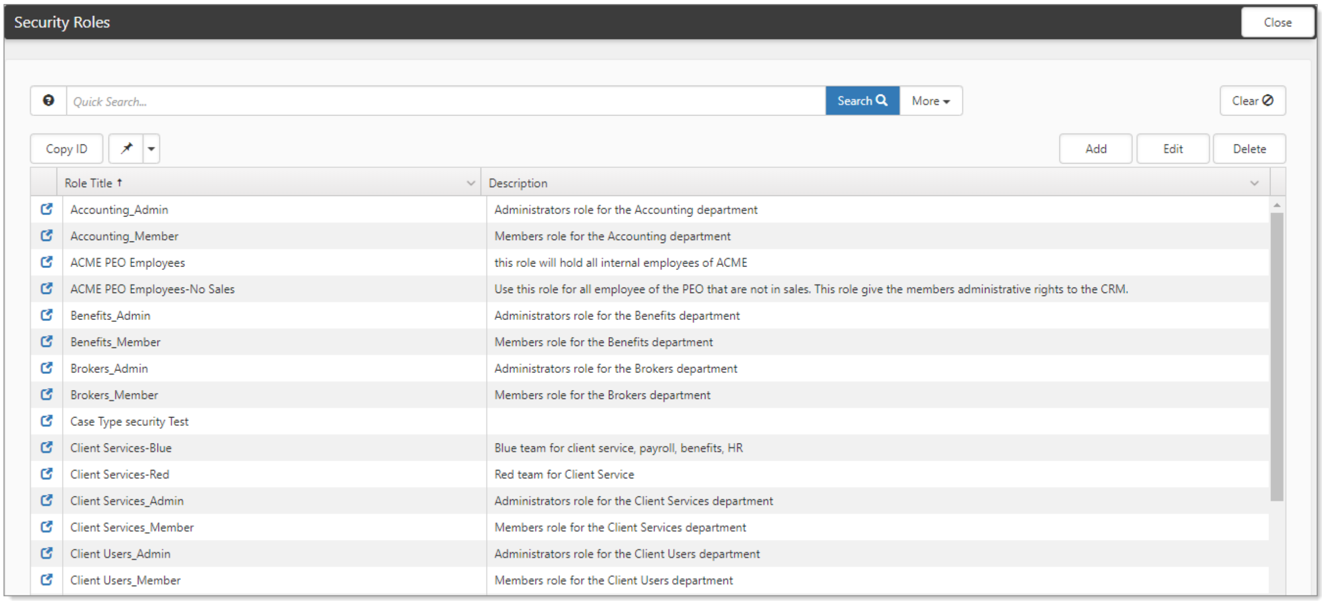
Unicel	10digitphonenumber@utext.com
US Cellular	10digitphonenumber@email.uscc.net
Solo Mobile	10digitphonenumber@txt.bell.ca
Sprint	10digitphonenumber@messaging.sprintpcs.com
Sumcom	10digitphonenumber@tms.suncom.com
Surewest Communication	10digitphonenumber@mobile.surewest.com
T-Mobile	10digitphonenumber@tmomail.net
Telus	10digitphonenumber@msg.telus.com
Triton	10digitphonenumber@tms.suncom.com
Unicel	10digitphonenumber@utext.com
US Cellular	10digitphonenumber@email.uscc.net
US West	10digitphonenumber@uswestdatamail.com
Verizon	10digitphonenumber@vtext.com
Virgin Mobile	10digitphonenumber@vmobl.com
Virgin Mobile Canada	10digitphonenumber@vmobile.ca
West Central Wireless	10digitphonenumber@sms.wcc.net
Western Wireless	10digitphonenumber@cellularonewest.com

Administering role security

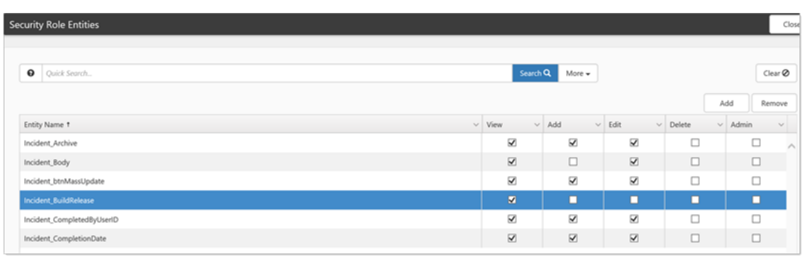
In this procedure, you first select a role, and then you edit the rights associated with the role.

To administer role security:

1. Go to the **System Admin** > **Security** > **Roles**.
   The Security Roles dashboard opens.
2. Use **More** to filter by Role Title, Users that are associated with the role, or Entity Name of the associated Security Entities.
3. You can also use a wildcard when searching for roles. When setting search parameters, place a **%** symbol before your search string to make it a wildcard keyword search. Example: %Service Case



4. In the **Security Roles** list, open an entry.
   The Role form opens showing Title, Description, and Administrative fields. In the Action Center, you see Entities and Users with a counter. The number 0 (zero) indicates there are no records.
5. If a user needs access to a particular security entity, you can do one of two actions:
   - Add the user to a role that already contains the required entity by filtering roles by the targeted entity.
   - Add the security entity to a role that the user is already associated with by filtering roles.
6. To view a list of users that are assigned to the selected role, in the **Action Center**, click **Users**.
   The Security Role Users dashboard opens.
7. To add users to the select role, click **Add**.
8. To view the rights for the role, in the **Action Center**, click **Entities**.
   The Security Role Entities list is displayed with the columns Entity Name, View, Add, Edit, Delete, and Admin.



9. To add or remove rights for the role, select or clear the options for **View**, **Add**, **Edit**, **Delete**, and **Admin**.

To see if a user is already in a role with a specific entity:

- Filter the Roles by User and Entity.

You can also use a wildcard when searching for roles:

- When setting search parameters, place a **%** symbol before your search string to make it a wildcard keyword search. Example: %Service Case

Task Security

This topic discusses Task Security in ClientSpace. For more detailed information about security entities, see Standard security entities.

Security hierarchy

Default Security (no incident security entities)	If you are the **Creator**, **AssignedTo**, or **Owner** of the task, your user account will have View and Edit rights to existing tasks. **Notification Users** will have View Access to the task, but unless additional security is provided by other entities the task fields will be read-only. You can Add Tasks to Org, Contacts, or a dataform. Due Date field and Mark for Deletion field are read-only by default.
Incident_AllowTaskMaintenance	Allows user to edit tasks even though they are not one of the principal users of the task. (Creator, AssignedTo, and Owner)
Incident_DueDate	Gives rights to edit Due Date field.
Incident_MarkForDelete	Gives rights to edit Mark for Deletion field.
Incident_Dash_CanViewAllUsers	Unlocks the User search field on the Task Search Module.
Incident_Can_Add_Without_Dataform	Put the Add button on the Home dashboard and the Task Search Module. Still presents the workspace selector.
Incident_btnMassUpdate	Gives access to the Mass Update button on task lists.

It is also important to note that Global Admin users have full rights to View, Add and Edit tasks regardless of whether they are one of the principal users on the task or have any of the above security entities.

Giving users access to mass update tasks

The User must be in a Role with the Incident_btMassUpdate entity.

To give users access to mass update tasks:

1. Determine the Roles to which the user is a member.
2. Add **Incident_btnMassUpdate** to one of the user's roles or add the user to a role that already has that entity by following the **Role Administration guidelines**.
3. Go to **System Admin** > **Security** > **Roles**.
4. Filter roles by Role Title, Users that are associated with the role, or Entity Name of the associated Security Entities.
5. If a user needs to have access to a particular security entity, you can do **one** of the following:
   - Add the user to a role that already contains the required entity by filtering roles by targeted entity.
   - Add the security entity to a role that the user is already associated with by filtering roles.
6. Add the appropriate View, Add, Edit, Delete, and Admin rights for the role.
7. To see if a user is already in a role with a specific entity, filter the Roles by user *and* Entity.
8. You can also use a wildcard when searching for roles. When setting search parameters, place a % symbol before your search string to make it a wildcard keyword search. ex %Service Case

Securing attachments

You secure attachments (files) the same way for non-admins across all entities in the system.

All entities work like this:

1. First, you must have Edit rights for the entity (dataform or otherwise) that you are on to do anything but view files.
2. If you have Edit rights, you can optionally lock files down using an _**$Attachment** security entity.

Entity	**Security entity**
Dataforms	Use **{TableName}_$Attachment**: Set by selecting the **Attachments Secured** option on Dataform properties.
Orgs, Contacts, Activities	Use **CRM_$Attachment**: Must be added by a ClientSpace representative. If you would like to utilize CRM attachment security, log an Extranet case.

Entity	Security entity
Tasks	Use **Incident_$Attachment**: Must be added by a ClientSpace representative. If you would like to utilize task attachment security, log an Extranet case.
Attachments panel in Client Master	To use the Attachments panel on the Client Master, you need to be part of a role that has the **gen_ClientMaster_$Attachment** security entity.

To add a security entity to a role:

1. Go to **System Admin** > **Security** > **Roles**.
   The Security Roles dashboard opens.
2. Filter the roles by Role Title, Users that are associated with the role, or Entity Name of the associated Security Entities.
3. If a user needs access to a particular security entity, do **one** of the following:
   - Add the user to a role that already contains the required entity by filtering roles by desired entity.
   - Add the security entity to a role that user is already associated with by filtering roles.
4. Add the appropriate View, Add, Edit, Delete, and Admin rights for the role.
5. To see if a user is already in a role with a specific entity, filter the Roles by user *and* Entity.
6. You can also use a wildcard when searching for roles. When setting search parameters, place the % symbol before your search string to make it a wildcard keyword search. ex %Service Case

ClientSpace security tips

Role security changes do not appear to happen immediately

A common scenario for a Global Admin in ClientSpace is to apply dataform security within the application. For example:

- You secure a dataform by opening dataform manager, selecting the form, and going to Form Properties to check the Secured option.
- The system is immediately alerted to this change and the dataform is locked until you add the security entity (gen_DataformName) to a role.
- After adding the security entity to a role, you can assume a user by going to **System Admin** > **User Admin** selecting a user and clicking **Assume User**.

User security is cached at the server level and reset at login

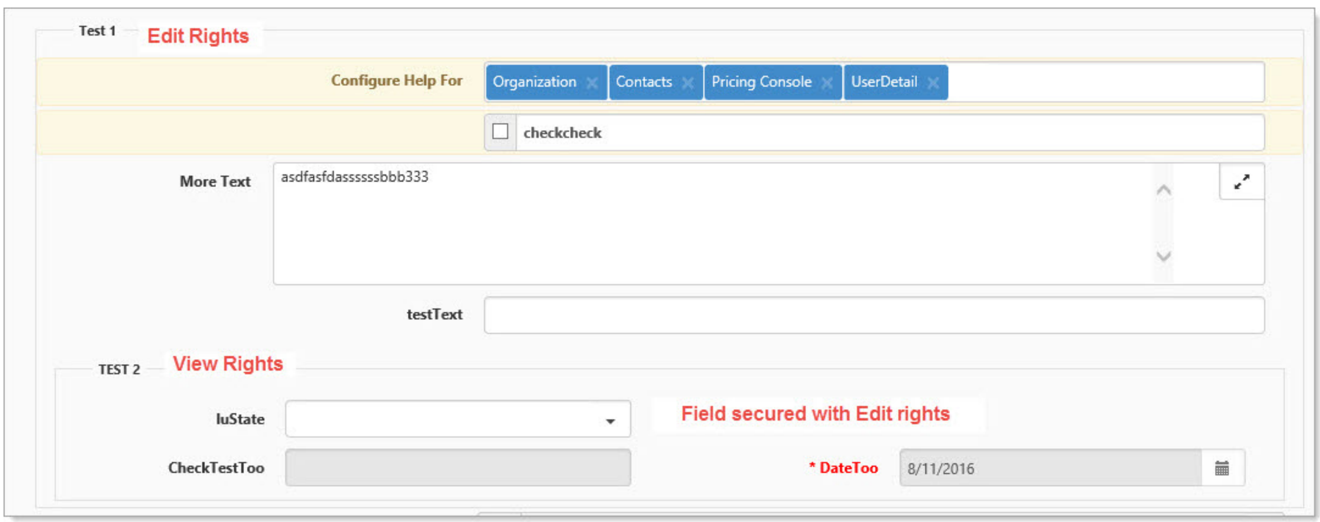
Assuming the user through Admin Settings provides the same security rights as that user. If you have just made security changes within the application, such as securing a dataform and adding the Security Entity to a role and you are unable to see the expected results, log an Extranet case and request they recycle the application pool to process the changes.

Best practice

To truly assume the same security settings as the user, it is a best practice to have a test user that you can configure with the appropriate security rights, then assume the test user and check security.

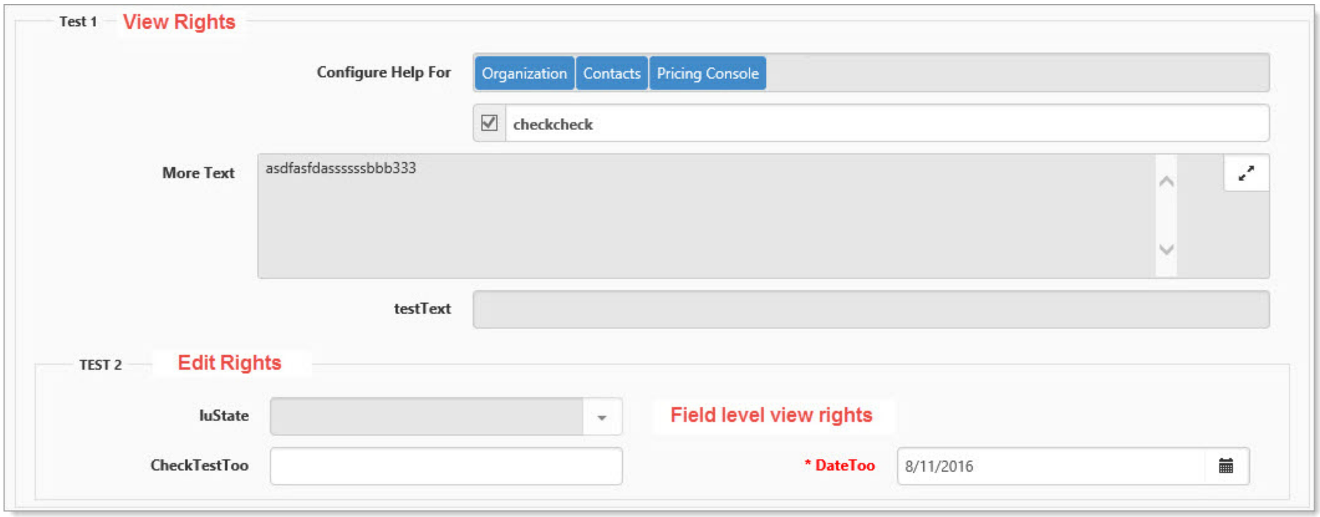
Securing a fieldset with View rights affects all the fields within that fieldset

ClientSpace allows hierarchical security, basically any field within a fieldset inherits the security applied to the fieldset (to a point). Individual field security within the fieldset is followed.



- In the example, Fieldset Test 1 has been secured with Edit rights, none of the fields within the fieldset have their own security so they inherit the security of the fieldset and are also secured with Edit rights.
- Fieldset Test 2 has been secured with View rights and the luState field within fieldset 2 has also been secured, but with Edit rights applied.
- Fields within Fieldset 2 inherit the Fieldset security unless they have their own security, so CheckTestToo and DateToo are View only, while luState which has it's own security can be edited.

There must be a minimum of View rights for a field or fieldset to appear on the form. In the following image, security has been flipped:



- Fieldset Test 1 has been secured with View rights, none of the fields within the fieldset have their own security so they inherit the security of the fieldset and are also secured with View rights.
- Fieldset Test 2 has been secured with Edit rights and the luState field within Fieldset 2 has also been secured, but with View rights applied.
- Fields within Fieldset 2 inherit the fieldset security unless they have their own security, so CheckTestToo and DateToo are editable, while luState which has its own security cannot be edited.

Configuring Organization and Workspace Security

This document discusses security configuration for Organizations and Workspaces in the ClientSpace application.

> Role security is ubiquitous throughout ClientSpace and therefore deleting an existing role can have widespread, unexpected consequences! Removing a role can remove access to multiple parts of the application. Before deleting any role security, if you are not sure of the consequences, log an Extranet case.

Security entities

Entities are the security objects used by the application to check what rights a user has to view, create or modify a system object. Entities are most commonly created by securing a Dataform or dataform field. Securing a dataform creates a Security Entity with the same name as the dataform. For example if you secure the WhatDo dataform a security entity of gen_WhatDo is created (gen_zWhatDo for a custom dataform). In a similar way, securing a dataform field will generate a security entity for the field of **dataformname_fieldname**.

So securing the YouWant field on the WhatDo dataform will create a security entity named gen_WhatDo_YouWant. Once a dataform or field is marked as secure, and that entity applied to a role this item is unavailable in the system unless a user is either a Global Admin, or a member of a role with at least view only rights for that security entity. In this way you can apply very granular security to dataform objects.

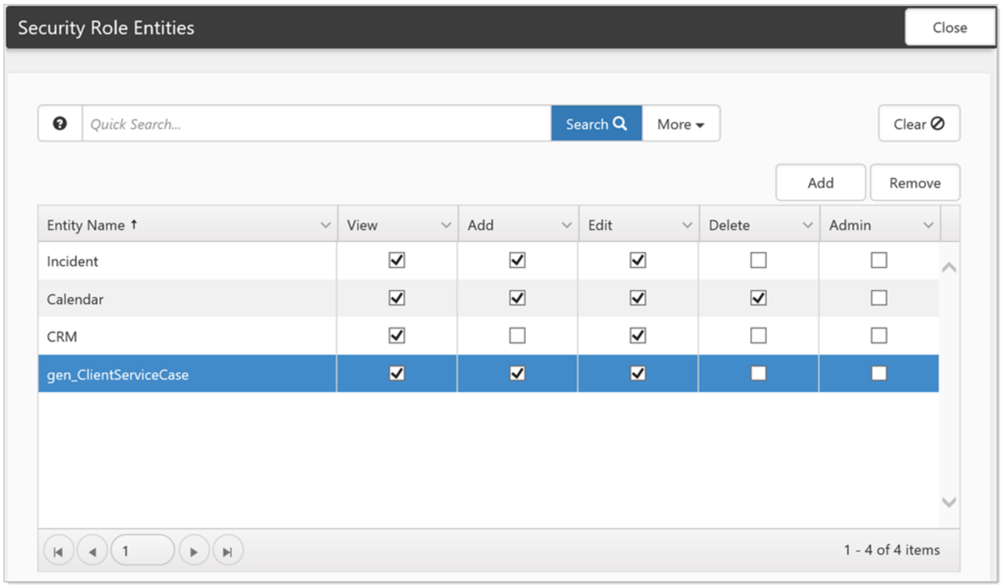
This security is also hierarchical, meaning if you secure a field set on a dataform, all the fields inside the field set are secured by default, effectively hiding them unless the user has at least view rights to the field set. Careful application of Security entities and role security can make dataform configuration incredibly robust, allowing the application to have a customized look and feel for different groups of users without having a large number of dataforms.

Security entities can also be artificially created as part of the development process to secure items that are not generated by the system such as processes or custom objects like dashboards.
The **CRM** entity for example is an object which provides a method for securing the Sales prospecting modules of ClientSpace. As with dataform field entities, the **CRM_Phone** entity controls rights to the Telephone field on the org and so on.

Similarly business object security can be used to secure specific attributes of the system, such as the **biz_clientservicecase_massupdate** object that secures the mass update button for the client service case dashboard, or the **biz_workflow_cm_accept**, which provides the user access to the Accept link on the Client Master page.

Another example is **Incident_AllowTaskMaintenance**. Ordinarily, only the Owner or Assigned to user can edit task fields. Adding the Incident_AllowTaskMaintenance entity to a user will allow them to edit certain fields on a task even if they are not the owner or assigned to user.

Adding a dataform entity to a security role allows the administrator to secure dataform records in the following ways:



- **View**: User can view the record (form or field) but is unable to add or manipulate the record.
- **Add**:* User can add new dataforms of that type, or insert information into a field. Add rights apply anywhere in the system dataforms may be added, whether that is within a multiform list, from a dashboard or from the + symbol on a dataform link.
- **Edit**: User can adjust a dataform or field.
- **Admin**: User has full rights to a dataform or field, inclusive of all other rights.

Add and Edit

It is important to note that add and edit are not necessarily inclusive, meaning you can give add but not edit rights, or vice versa. In the role above the user can edit an existing Client Master form, but not create the original form. It is further important to note that dataform security only applies to dataforms on workspaces the user has access to, so unless you are a global admin, workspace security supersedes dataform security. You will only have access to employee dataforms for example for employees of workspaces that you have access to, allowing workspace security to work even outside of the workspace, such as on a dashboard.

Admin security is powerful

Admin Security supercedes all other rights for dataforms - this includes special security such as the Row Level security for Secured case types. Do not apply admin rights to a dataform unless you are absolutely sure you want the role members to have Global Admin Access for that dataform.

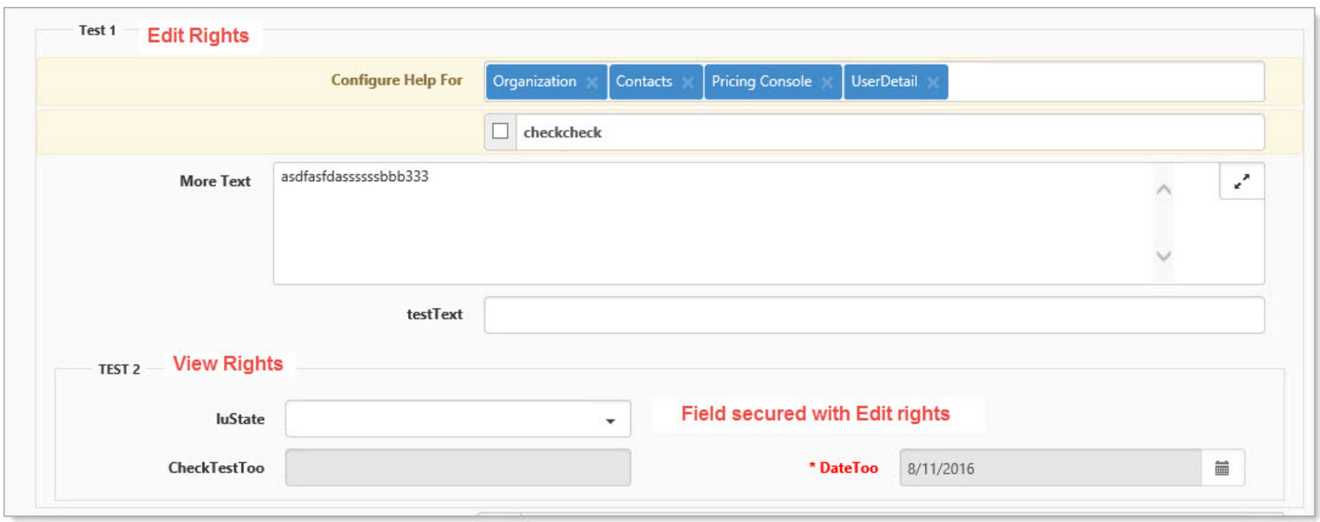
Security inheritance

Entity security is hierarchical, meaning that it is inherited from the parent object. This means that unsecured fields in a secured fieldset will inherit the security of the fieldset. For example, an unsecured field in a secured fieldset where the user role has view rights will display the unsecured field as read-only. Users with add rights to the fieldset will see the field as unlocked until it is filled, then the field will become read-only and so on.

Securing a fieldset with View rights affects all of the fields within that fieldset

ClientSpace allows **hierarchical security**; basically, any field within a fieldset inherits the security applied to the fieldset (to a point). Individual field security within the fieldset is still followed.

Example 1

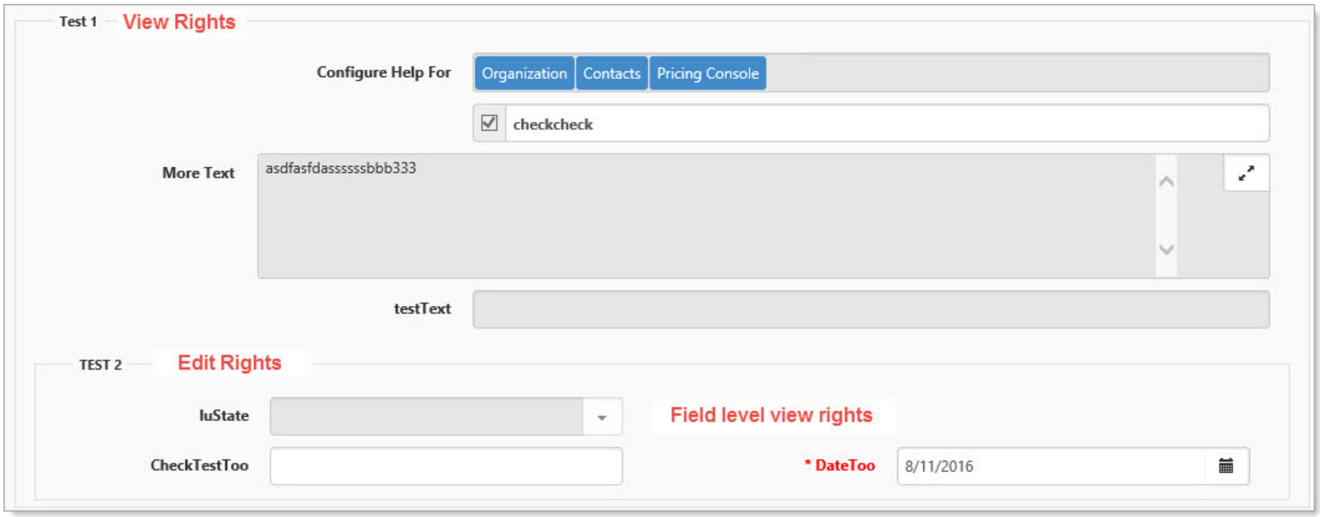


In the example:

- **Fieldset Test 1** has been secured with **Edit** rights, none of the fields within the fieldset have their own security so they inherit the security of the fieldset and are also secured with Edit rights.
- **Fieldset Test 2** has been secured with **View** rights and the **luState** field within fieldset 2 has also been secured, but with **Edit** rights applied.
- Fields within Fieldset 2 *inherit* the Fieldset security unless they have their own security, so CheckTestToo and DateToo are View only, while luState which has its own security can be edited.

Example 2

There ***must be a minimum of view rights*** for a field or fieldset to appear on the form. In the following image, security has been flipped.



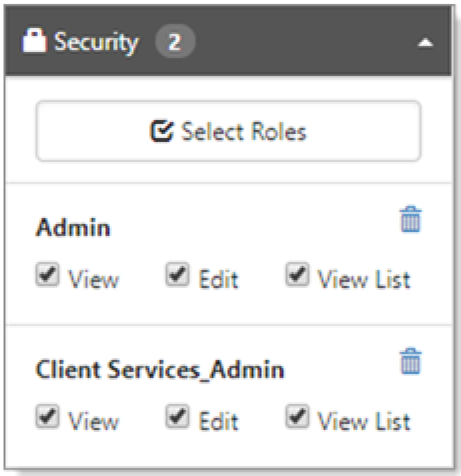
In the example:

- **Fieldset Test 1** has been secured with **View** rights; none of the fields within the fieldset have their own security so they inherit the security of the fieldset and are also secured with **View** rights.
- **Fieldset Test 2** has been secured with **Edit** rights and the **luState** field within fieldset 2 has also been secured, but with **View** rights applied.
- Fields within Fieldset 2 *inherit* the Fieldset security unless they have their own security, so CheckTestToo and DateToo are editable, while luState which has its own security cannot be edited.

Best practice

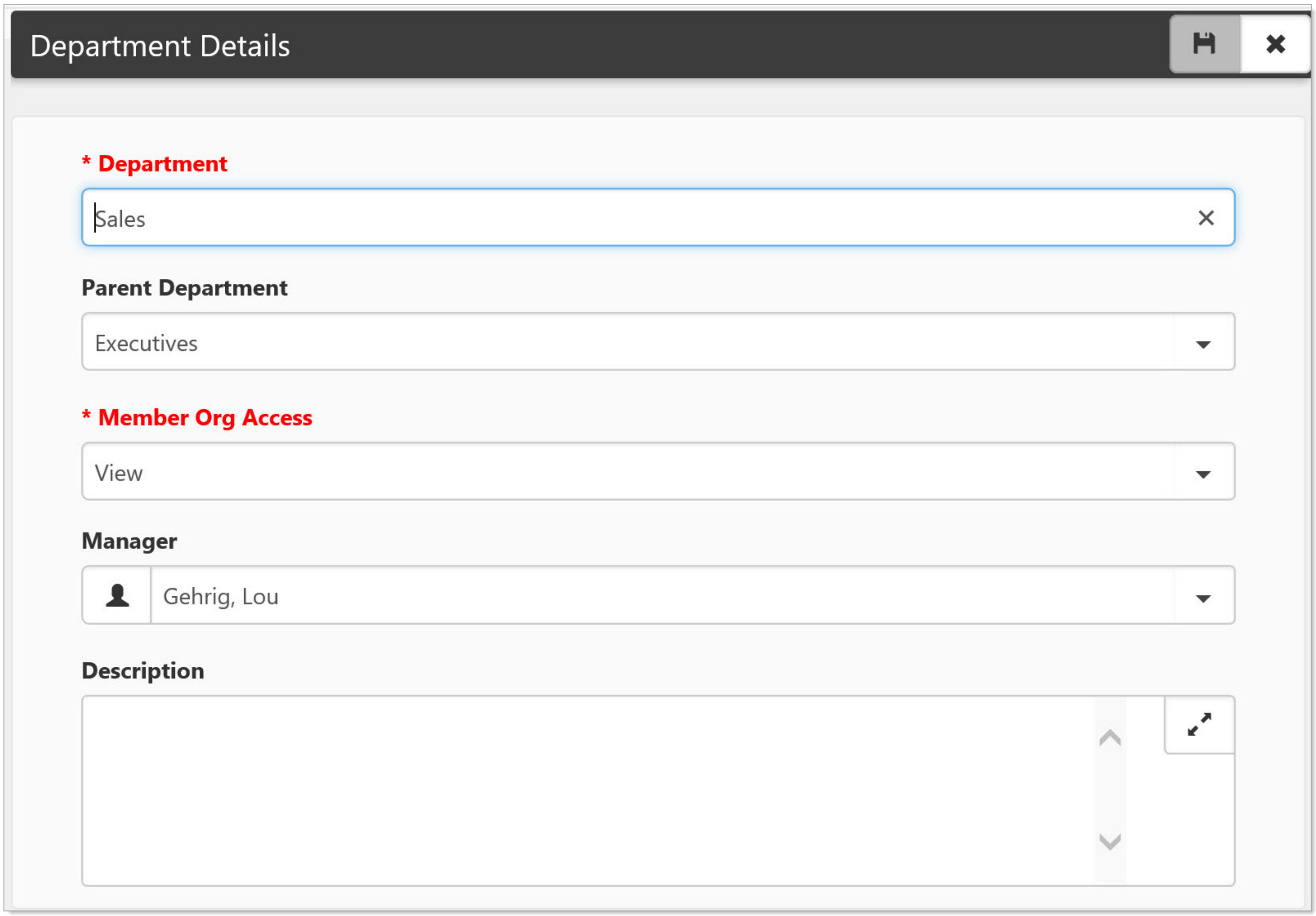
Draw a diagram of the dataform prior to adding security to it in order to map out how you would like the field access to occur. This helps you to envision the different users that will need access to the dataform and help you to better plan out how to architect the security and associated user roles.

Organization security



- **View List**: John can see all of Tim's orgs as well as his own, but if he attempts to open one of Tim's Org records the system will let him know he does not have access.
- **View**: John can view Tim's orgs in the list and open any of Tim's orgs, but the fields are all read-only and John has no edit rights.
- **Edit**: John can open and edit Tim's orgs as if they were his own.

Departmental security

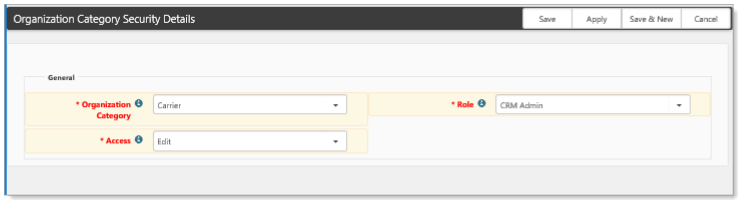


When a department is created, the system will generate roles for Department Admin and Department member. Departmental security determines what access departmental members and admins have to organizations created by other members of the same department and range from None to Edit – users in the Department Admin role additionally **have full admin access to the Department Members organizations** unless organization fields are specifically secured by adding organization field Security Entities to a role. For example, Tim and John are both members of the sales department. Tim creates a number of organizations and John opens the Org Search dashboard. What Member Org Access rights the Sales Members have determines what access John will have to Tim's orgs.

- **None**: John does not even see the orgs or know they exist. If John attempts to create a duplicate of an existing org, the system will warn him a dupe exists.
- **View List:** John can see all of Tim's orgs as well as his own, but if he attempts to open one of Tim's Org records the system will let him know he does not have access.

- **View:** John can view Tim's orgs in the list and open any of Tim's orgs, but the fields are all read-only and John has no edit rights.
- **Edit:** John can open and edit Tim's orgs as if they were his own.

Org Category security



Org category security works in much the same way Departmental security works but is configured under **System Admin** > **Security** > **Org Categories**. Category security is configurable using the following parameters:

- **Organization Category**: The configured security rights only apply to organizations of this Category.
- **Role**: The configured security rights are shared by all members of this role.
- **Access**: Determines what rights members of the configured Role will have for Organizations of the configured Category.

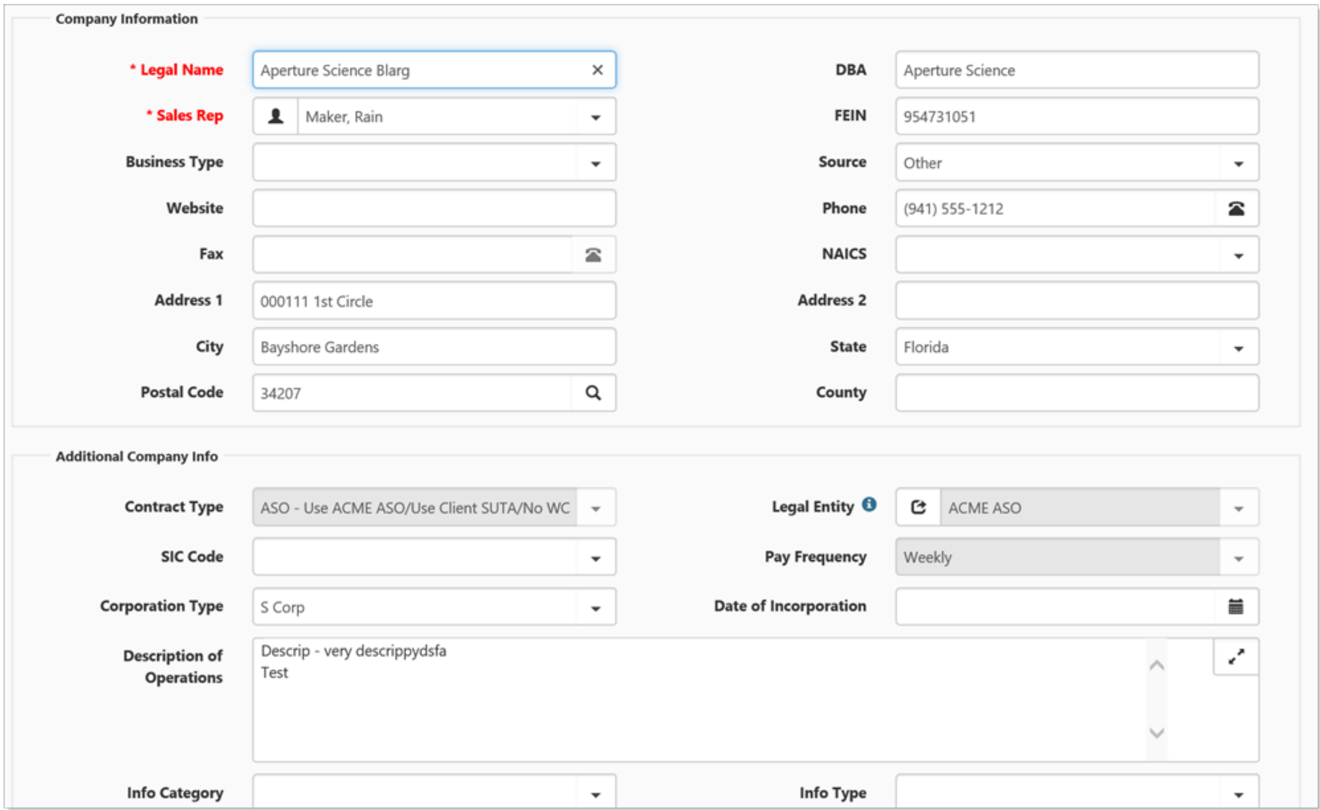
Org Category security dynamically updates organization security with changes to the associated Organization category. Changes made under System Admin > Security > Org Categories automatically propagate to the associated organizations with a related category. Changes include category, role, and access changes. If an Org Category is deleted, the security is removed from all associated organizations.

Workspace users

The list of ClientSpace users who have access to a workspace can be found under **Workspace Settings** > **Users**. Only these users and Global Admins will be able to access the workspace. As in the image above, the users in the list are pre-filtered for the current workspace. These users include Template workspace users for the template from which this workspace was generated as well as the associated organizations AssignedTo user and their departmental admin.

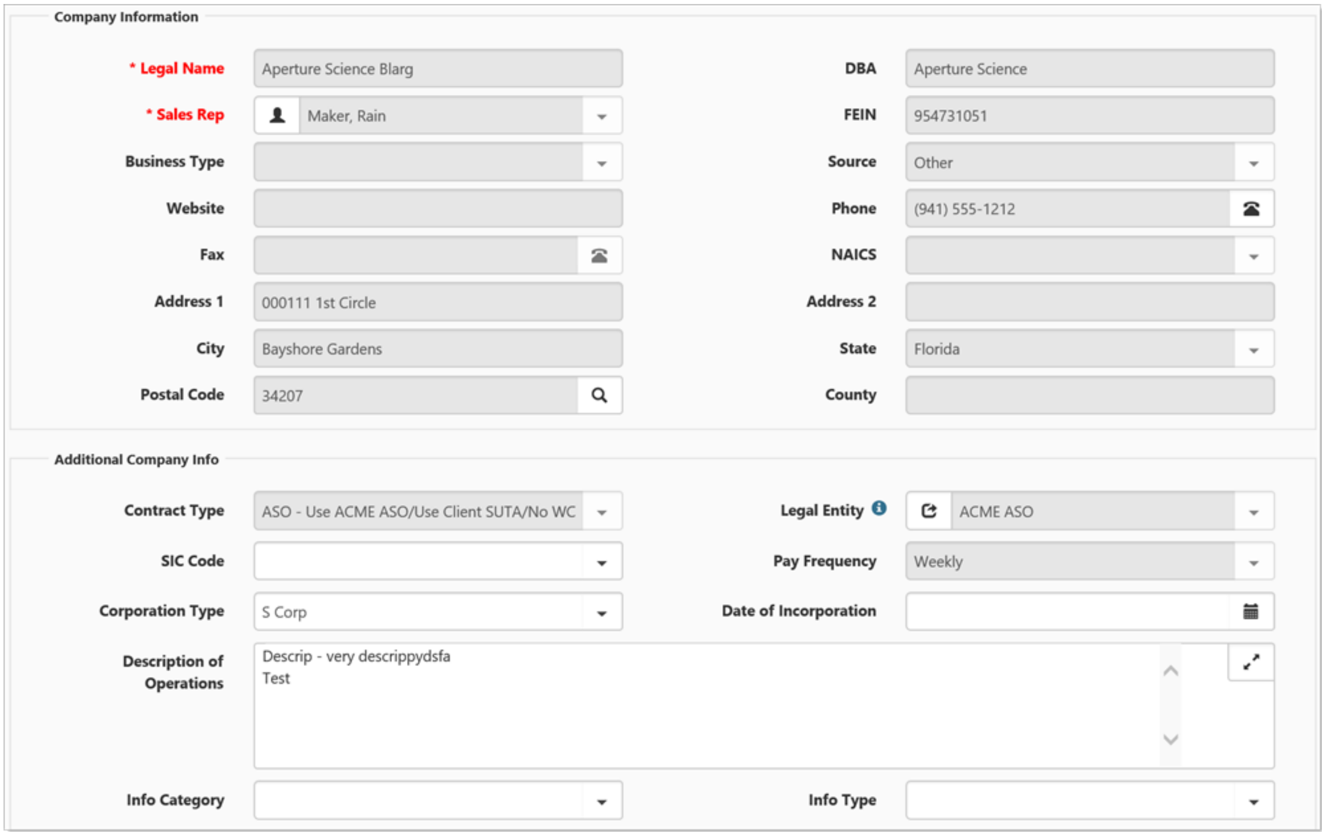
Client Master: Org fields

The Client Master dataform is an amalgam of Organization data and gen_ClientMaster dataform information. Security for the Client Master dataform and fields is controlled by dataform level security entities, while security for the Organization data presented on the Client Master is controlled by the CRM security entity. Full CRM rights can be seen in the following image.



Client Master with CRM Edit rights

While removing the Edit rights from CRM will cause the Organization fields on the Client Master to appear Read-Only.



Client Master without CRM Edit/Admin rights

The rest of the fields on the Client Master dataform are controlled by Dataform and DataformField security entities, while the header action links are controlled via biz_workflow entities, such as biz_workflow_cm_activate. For detailed information on security entities and their application, see Standard security entities.

Standard security entities

The following table defines Standard Security Entities included in our PEO product. Your ClientSpace installation may have a different list of available entities that include custom security entities. Where entities are system generated, such as for dataform or template security, guidelines have been provided that discuss the standardized formats used to generate the entity name.

Entity	Description	Required Rights
biz_ClientDistressCallOwner	Used to configure a user as the owner on distress calls.	

Entity	Description	Required Rights
biz_ClientServiceCase_Email_ Notifications	Enables a user to received email from the nightly CSC notification process.	View
biz_clientservicecase_ massupdate	Controls access to the Mass Update button on the Case Search dashboard	
biz_clientservicecase_ subscriptions	Allows access to the Case Type Subscriptions link on the user profile.	
biz_clientteam_massupdate	Controls access to the Mass Update button on the Team Search dashboard	
biz_CommissionDetail_ SalesEntity		Add/Edit
biz_crm_show_snapshot	Allows the user to see the Client Snapshot if they have access to the workspace	View
biz_pricing_batch_can_override_ admin_percent		
biz_pricing_batch_multibatch	Enables use of multiple comparison batches	
biz_pricing_code_can_view_ header		View
biz_pricing_state_can_override_ premium_discount		
biz_pricing_submitted_batch	Users with View rights to this entity can edit pricing fields when the Batch is in Submitted and Underwriting status. Otherwise, the pricing fields can only be editing when the Batch is in New status.	View
biz_pricingconsole_ canchangeuser	Users allowed to change pricing console user filter	

Entity	Description	Required Rights
biz_pricingconsole_breakdown	User allowed to see the pricing breakdown matrix at the bottom of pricing console and in the pricing widget on the workspace landing page.	View
biz_pricingconsole_add_statecodes_activatedstatus	Controls access to the Add State & Code button on the Pricing Console. When the status of the Pricing Batch is Activated, you can secure the button so that only certain user roles can perform the action.	Add
biz_surcharge_can_view_header		View
biz_surcharges_clientsetup	SecEntity associated with Client Setup Field access on the Pricing Console.	
biz_view_pc_gp_after_commissions	Allow visibility to Pricing Console Gross Profit After Commissions	View
biz_workflow_benefitbenefitplan_activate	Controls access to the Company Benefits Plan workflow link - activate	View
biz_workflow_benefitbenefitplan_expire	Controls access to the Company Benefits Plan workflow link - expire	View
biz_workflow_benefitbenefitplan_pending	Controls access to the Company Benefits Plan workflow link - set to pending	View
biz_workflow_benefitbenefitplan_reject	Controls access to the Company Benefits Plan workflow link - reject	View
biz_workflow_benefitbenefitplan_select	Controls access to the Company Benefits Plan workflow link - select	View
biz_workflow_benefitplan_activate	Controls access to the Administrative Benefits Plan workflow link - activate	View
biz_workflow_benefitplan_cancel	Controls access to the Administrative Benefits Plan workflow link - cancel	View
biz_workflow_benefitplan_expire	Controls access to the Administrative Benefits Plan workflow link - expire	View

Entity	Description	Required Rights
biz_workflow_benefitplan_pending	Controls access to the Administrative Benefits Plan workflow link - pending	View
biz_workflow_benefitplan_renew	Controls access to the Administrative Benefits Plan workflow link - renew	View
biz_workflow_cm_accept	Controls access to Client Master pricing workflow link - accept	Edit
biz_workflow_cm_activate	Controls access to Client Master pricing workflow link - activate	Edit
biz_workflow_cm_activate_future	Controls access to Client Master pricing workflow link - activate future (based on activation date)	Edit
biz_workflow_cm_activate_now	Controls access to Client Master pricing workflow link - activate now	Edit
biz_workflow_cm_approve	Controls access to Client Master pricing workflow link - approve	Edit
biz_workflow_cm_clone	Controls access to Client Master pricing workflow link - clone (pricing batch)	Edit
biz_workflow_cm_contract_signed	Controls access to Client Master pricing workflow link - contract signed	Edit
biz_workflow_cm_create_batch	Controls access to Client Master pricing workflow link -	Edit
biz_workflow_cm_decline	Controls access to Client Master pricing workflow link - decline an existing batch	Edit
biz_workflow_cm_expire	Controls access to Client Master pricing workflow link - expire an existing batch	Edit
biz_workflow_cm_kill	Controls access to Client Master pricing workflow link - kill an existing batch	Edit
biz_workflow_cm_reactivate	Allows the reactivation of RFPs that were set to Dead	Edit

Entity	Description	Required Rights
biz_workflow_cm_reinstate	Allows you to re-instate a terminated client	Edit
biz_workflow_cm_reprocess	Allows you to re-process a batch, sets it back to pre-submit	Edit
biz_workflow_cm_submit	Allows you to submit a batch from the Client Master header link	Edit
biz_workflow_cm_terminate	Allows you to Terminate a client from the Client Master Header link (moves client to Pending Termination Status)	Edit
biz_workflow_coi_approve	Allows access to the Approve link on Certificate of Insurance	View
biz_workflow_coi_cancel	Allows access to the Cancel link on Certificate of Insurance	View
biz_workflow_coi_expire	Allows access to the Expire link on Certificate of Insurance	View
biz_workflow_coi_issue	Allows access to the Issue link on Certificate of Insurance	View
biz_workflow_ employeebenefits_renew	Controls access to the Renew Link on the EmployeeBenefits dataform	View
biz_workflow_pb_accept	Controls access to the Pricing Batch workflow link - accept	Edit
biz_workflow_pb_activate	Controls access to the Pricing Batch workflow link - activate	Edit
biz_workflow_pb_activate_future	Controls access to the Pricing Batch workflow link - activate future - based on activation date	Edit
biz_workflow_pb_approve	Controls access to the Pricing Batch workflow link - approve	Edit

Entity	Description	Required Rights
biz_workflow_pb_clone	Controls access to the Pricing Batch workflow link - clone	Edit
biz_workflow_pb_decline	Controls access to the Pricing Batch workflow link - decline	Edit
biz_workflow_pb_kill	Controls access to the Pricing Batch workflow link - kill	Edit
biz_workflow_pb_submit	Controls access to the Pricing Batch workflow link - submit	Edit
biz_workflow_pc_activate	Controls access to the Pricing Code workflow link - activate	Edit
biz_workflow_pc_decline	Controls access to the Pricing Code workflow link - decline	Edit
biz_workflow_policy_sendcoi	Controls access to the Workers' Comp Policy action link to send certificates of insurance	View
biz_workflow_ps_activate	Controls access to the Pricing State workflow link - activate	Edit
biz_workflow_ps_approve	Controls access to the Pricing State workflow link - approve	Edit
biz_workflow_ps_decline	Controls access to the Pricing State workflow link - decline	Edit
biz_workflow_ps_kill	Controls access to the Pricing State workflow link - kill	Edit
biz_workflow_ps_submit	Controls access to the Pricing State workflow link - submit	Edit
CRM_CanSaveDuplicates	Controls whether a CRM user can save a duplicate organization or must request review	View

Entity	Description	Required Rights
gen_dataformname	Dataform security	View/Add/Edit/Admin
gen_dataformName_field	Dataform Field security	View/Add/Edit/Admin
Incident_Can_Add_Without_ Dataform	Task - allows the user to add Tasks to the system without an associated dataform. Used on some Task dashboards.	View
Incident_AllowTaskMaintance	Put the Add button on the Home dashboard and the Task Search Module. Still presents the workspace selector.	
Incident_Fieldname	Controls field specific security on the task - not configurable	View/Add/Edit
Incident_Dash_CanViewAllUsers	Unlocks the User search field on the Task Search Module.	
Incident_Can_Add_Without_ Dataform	Put the Add button on the Home dashboard and the Task Search Module. Still presents the workspace selector.	
Incident_IsActive	Secures the Active option on Tasks. This does not affect mass updates through the task manager. Users with rights to perform mass updates can still mark a task as Inactive by completing and archiving the task.	View
PricingConsole	At least View rights required to provide access to Pricing Console.	View
ProfitibilityBreakdown	Allows the user to view the profit information at the bottom of the Pricing Console.	View
QuickEdit	At least Add rights required to provide access to Enhanced Pricing Console Quick Edit Form	Add/Edit/Admin

Entity	Description	Required Rights
QuickEdit_ClientModifier	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_ CurrentEffectiveCompRate	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_EffectiveCompRate	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_fkCompCodeID	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_FullTimeEmployees	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_GrossPayroll	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_OverrideBAF	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_PartTimeEmployees	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_PayFrequency	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_PremiumDiscount	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_State	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_SUTA	Works like dataform field security	View/Add/Edit/Admin
QuickEdit_SUTARate	Works like dataform field security	View/Add/Edit/Admin
SurchargeType_ClientSetup	SecEntity associated with ClientSetup Surcharge Type.	
tblContact_IsActive	Security on the Contact table	View/Add/Edit
tblOrganization_IsActive	Security on the Organization table	View/Add/Edit
template_templatename_ member	Template security (replacing TemplateName with the actual name of the associated template). Allows a user to create workspaces for this template.	
{TableName}_$Attachment	Security entity used to secure the Dataform Attachment Action item	View/Add/Edit/Admin
CRM_$Attachment	Security entity used to secure the Organization and Contact attachment Action item	View/Add/Edit/Admin

Entity	Description	Required Rights
Incident_$Attachment	Security entity used to secure the Task Attachment Action item	View/Add/Edit/Admin
UnderwriterApprView	Allows a user access to all Approval records. (NOT real-time – only applies when the Approval is created.)	View/Add/Edit/Admin

Configuring security in Business Intelligence reporting

This topic describes the elements involved in configuring and regulating security in Reporting Profile and Business Intelligence reports in ClientSpace.

Configuring Reporting Profiles

Configuring security for Reporting Profiles for Business Intelligence reporting is a multi-step process. For a ClientSpace user to access data from BI reports, the user must have a Reporting Profile. These profiles, in combination with Dataform security, determine what data the user can access through the reports. This design ensures that if a user does not have access to a particular piece of data through the standard user interface (UI), they cannot access the data through reporting. The first step is to configure Reporting Profiles, which secure the tables and views used as datasources by the Reports interface.

To configure reporting profiles:

1. Go to **System Admin** > **Security** > **Reporting Profile**.
   The Reporting Profile dashboard opens.
2. For an existing profile, select a profile from the list and click (**Jump**).
3. Select the appropriate options: **Allow Report Creation** or **Allow All Forms and Views**.
4. Click **Save**.

To add a new profile:

1. Click **Add**.
2. In **New Reporting Profile**, in **Profile Name**, enter a name.
3. Select the appropriate options: **Allow Report Creation** or **Allow All Forms and Views**.
4. Click **Save**.

> Reporting Profile security takes precedence over Report Security. The Reporting Profile security hides a report in the list if the user does not have access to all the tables called by the report.

Configuring the user profile

Now that you have the profile configured, you must add the profile to the user in question to enforce the form security.

To configure the user profile:

1. Go to **System Admin** ⚙ > **Users**.
   The Users dashboard opens.
2. Open the user account (double-click an entry).
   The User Details form opens.
3. In **Administrator Settings**, in the **Reporting Profile** list, select a profile for the user.
4. Click **Save**.

Securing the report

The final step is to secure the individual reports. Report security in combination with the datasource security can be quite granular in its application.

To secure the report:

1. Open a report.
2. On the report, click the **Misc** tab.
3. To adjust the **Share With** section of the report, select a ClientSpace role containing the users in question and an appropriate **Rights**. The various rights levels are:

Full Access	Report is available to the user to view, modify, and save changes to the report. Note that the owner user (UserName property of the ReportSet) is not changed on saving, that is the original owner (creator) of the report stays the same.
Read Only	Report is available to the user to view, add, or remove filters, and modify existing filter values. Also, the user can modify (design) the report but cannot save it. However, the user could Save As this report.
View Only	Report is available to the user to view, but not to modify in any way or save changes to the report.

Locked	Report is available to the user to view and modify existing filter values, but the user cannot add or remove filters or fields or save changes to the report. Note that modifying filter operator and/or filtered column is restricted as well.
None	Report is unavailable to (hidden from) the user.

Additional security: Report filtering using #CurrentUser

A common practice in Sales reporting is to use the custom wildcard of #CurrentUser on a filter for the Assigned To user of an Organization or other similar User ID fields. This wildcard tells the report to only access records where the AssignedTo User ID is equal to the User ID of the currently logged in user of ClientSpace.

Configuring Pricing Console security in ClientSpace PEO

One of the common first steps for our PEO clients is to configure and use the pricing console in ClientSpace. While each PEO is unique in their processes, most have a designated workflow through which they would like Pricing to proceed. While this topic does not discuss pricing workflow, it provides a high-level overview of configuring pricing console security.

While security customization is driven by the individual business requirements of each of our clients, the method for configuring security in ClientSpace is standardized. Role security provides global administrators with the ability to configure dataform security down to the field level, specifying whether the User is allowed to **View**, **Add**, or **Edit** the document or field. The following table lists dataform security rights.

Dataform security rights	Description
View	Users with only View rights are able to open a dataform and see the contents of any available fields but may not add a new or edit an existing document. Fields appear as read-only. Users with Add or Edit rights should also be given View rights.
Add	Users with only Add rights can add new dataforms of this type, but when the initial save occurs, they cannot edit the dataform they created.
Edit	Users with only Edit rights are not able to add new forms but can edit existing forms.

To update Role security:

Update Role security to include appropriate rights to View/Add/Edit the forms using the following steps. Several security entities are used by the Pricing Console. The following table lists the most common.

Security entity	Description	Rights
CRM	Creating and managing Organizations	At least **View** rights
biz_workflow_cm_create_batch	Creating batches from the Client Master	At least **Add** rights to create new batch
PricingConsole	Access to the pricing console	At least **View** rights
QuickEdit	QuickEdit_subfields: For each field on the Quick Edit form there are available view/Add/Edit rights. These need to be set for each field (if editing of pricing rows is allowed).	At least **Add** rights
Dataform entities • gen_PricingBatch • gen_Pricing • gen_PricingBatchState • gen_PricingCompCode • gen_ClientMaster	If any of the dataforms are secured, the user needs to be in a role with appropriate rights for the dataform, such as Add or Edit rights.	At least **View** rights are also required for the related Dataform entities

To administer role security:

1. Go to **System Admin** > **Security** > **Roles**.
   The Security Roles dashboard opens.
2. You can filter roles Role Title, and Users that are associated with the role, or Entity Name of the associated Security Entities.
3. If a user needs to have access to a particular security entity, one of two things can be done:
   - The user can be added to a role that already contains the required entity by filtering roles by desired entity.
   - The security entity can be added to a role that user is already associated with by filtering roles.
4. Select a role and click **Edit**.

The Role form opens.

5. In the **Action Center**, click **Entities**.
   The Security Role Entities dashboard opens.
6. Add the appropriate View, Add, Edit, Delete, and Admin rights for the role.
7. To see if a user is already in a role with a specific entity, filter the Roles by user *and* Entity.
8. You can also use a wildcard when searching for roles. When setting search parameters, place a **%** symbol before your search string to make it a wildcard keyword search. Example: %Service Case

Chapter 21
Troubleshooting

Got a problem? Find step-by-step instructions on resolving specific ClientSpace issues here.

This chapter includes issue resolution topics for:

- Application troubleshooting
- Administration troubleshooting
- Outlook add-in and modules issues

Application troubleshooting

Application issues occur during normal use, sometimes the error codes are helpful, sometimes not, but if you have the code, try using the error info in the search box. The following documented errors comprise a list of troubleshooting tips.

"Invalid Cast Exception" when using Business Intelligence

Problem: You run a report that has an embedded drill down link and when you click the link an error is thrown: "Invalid cast exception - an error has occurred while processing this request".

Cause: Column additions in the middle of the report have caused the drill down link to break as the referenced column has been moved.

Solution: Adding a column to the middle of a report with drill downs will shift the column count below the new column by one. This can be corrected by either:

- Move the new column to the end of the report.
- Update your embedded drill down links to account for the new column.

"You are not authorized to view this page" on Pricing Console

Problem: You attempt to access the ClientSpace pricing console and you receive the error "You are not authorized to view this page".

Cause: You do not have sufficient security rights to add/edit one of the Pricing Console associated functions or dataforms (Client Master, Pricing Batch, State or Code).

Solution: Update the Role security to include appropriate rights to View/Add/Edit the forms using the following steps. There are several security entities in use by the Pricing Console. The most common are:

- CRM - creating and managing Organizations - At least View rights
- biz_workflow_cm_create_batch - creating batches from the Client Master - At least Add Rights to create new batch
- PricingConsole - access to the pricing console - At least View rights
- QuickEdit - At least **Add** rights
  - QuickEdit_subfields - for each field on the Quick Edit form there are available view/Add/Edit rights, these will need to be set for each field (if editing of pricing rows is allowed)

At least **View** rights are also required for the related Dataform entities such as:

- gen_PricingBatch
- gen_Pricing
- gen_PricingBatchState
- gen_PricingCompCode
- gen_ClientMaster

If any of the dataforms are secured the user will need to be in a role with appropriate rights for the dataform, such as Add or Edit rights.

See Administering role security.

Pricing Console errors

Problem: You attempt to open the pricing console and receive SQL errors relating to Arithmetic Overflow.

Cause: Field value is not properly set or way outside normal parameters. Something such as the Admin % field being set to 150000%. Downstream calculations that use this number will fail.

Solution: Fix erroneous data

1. Find the erroneous field on one of the Pricing Forms - either Batch, State, or Code.
2. Because you cannot access these forms through the Pricing Console, you need to go to the Workspace in question and Access Dataforms from the Workspace Action Menu.
3. Navigate to the forms in question, find the offending field, and correct the value.

Dataform save error: "Object reference not set to an instance of an object..."

Problem: You attempt to add a new field to a dataform and receive the error "Whoops - something went wrong..." When you check the exception logs you find the slightly more detailed error: "Object reference not set to an instance of an object. URL: http://yourinstall.clientspace.net/Next/Admin /ProjectAttribute/Detail" the system will not allow you to save the field.

Cause: You have attempted to use a field name that is already in use on the dataform. This could be a system generated field, such as CreateDate, UpdateDate, CreatedByUserID, UpdatedByUserID, etc. SQL will not allow you to create two columns on the same table with exactly the same name, hence the error.

Solution: Change the field name and re-save. Avoid using any of the names for the existing fields on the dataform, or any of the system protected fields. If you are unsure of the preexisting field names, you should run the Dataform Specification report to get a list of all the current dataform field names.

Error when editing field information: "Incorrect syntax near ',' "

Problem: When trying to edit the Field configuration on a dataform, the following error appears:

```
Incorrect syntax near ','.
Incorrect syntax near the keyword 'with'. If this statement is a common table
expression, an xmlnamespaces clause or a change tracking context clause, the
previous statement must be terminated with a semicolon.
```

Cause: A lookup field does not have a Lookup Group defined and is being set as a Multiform Column. The lookup group is used to decode the column for the list, so the system effectively doesn't know how to decode the column.

Solution: Open the Lookup field that is defined as a Multiform Column and add a Lookup Group. See Configuring lookups.

Error when running PDF Merge: "Rebuild failed: trailer not found"

Problem: You attempt to run a merge to PDF and when the PDF opens, fields are not being displayed properly and some of the data is missing. When you check the exception logs, you find the error: "Rebuild failed: trailer not found.; Original message: Error reading string at file pointer #######"

Cause: Adobe Acrobat reader is not installed on the machine or is corrupted. The PDF is attempting to open in your default web browser but cannot be read properly by the browser.

Solution: Install / reinstall Adobe Acrobat Reader. See instructions at Adobe.com: https://acrobat.adobe.com/us/en/products/pdf-reader.html

Error: "Column headers have not been defined for this dataform."

Problem: You are creating a new multiform in the application and when you attempt to review the form on a workspace you receive the error: Column header has not been defined for this dataform or this dataform has been incorrectly defined as a One to Many relationship. Go to the Dataform Admin section under System Admin to set up column headers.

Cause: Multiform list has not been defined.

Solution: See Defining dataform multiform list column headers.

Error: "Failed to save dashboard: Category\DashboardName"

Problem: You are attempting to edit a dashboard embedded Report Title or Description and you receive the error "Error Failed to save dashboard: CategoryName\DashboardName"

Cause: Neither the Title nor description on Reports from the dashboard UI accepts special characters, including numeric characters such as *equals* signs.

Solution: Change your Description or title so that it does not contain a special character.

Error: 'The OpenDataSource Method or Property Is Not Available'

Problem: When trying to run a merge, the error message, “The OpenDataSource Method or property is not available because this command is not available for reading” appears. The merge document opens, however, it returns no data.

Cause: Microsoft Word 2013 defaults to open a document in read only mode. The data cannot be written into the merge because Word does not allow editing in read only mode.

Solution: Change default settings in Word.

1. Open a Word document.
2. Open Word options from the File toolbar.
3. On the bottom of the General tab clear the option **Open e-mail attachments and other uneditable files in reading view**. This prevents Word from opening in read-only view, therefore the data will merge.

Exception log error: "The Condition Expression cannot contain one of the SQL keywords: DELETE, SELECT, DROP, etc. Link Configuration ID: ###"

Problem: Exception log contains the error: "The Condition Expression cannot contain one of the SQL keywords: DELETE, SELECT, DROP, UPDATE, EXEC, EXECUTE, INSERT, ALTER or CREATE. Link Configuration ID: ###"

Cause: Link Display condition is configured with SQL Protected Word. The underlying code has been designed to eliminate the possibility of SQL Injection, and so will throw an error if any of the words DELETE, SELECT, DROP, UPDATE, EXEC, EXECUTE, INSERT, ALTER or CREATE are used when configuring Link Condition Expressions.

Solution: Edit the Link Display Configuration conditions to remove the SQL Protected word. Also remove the Protected word from the Condition Expression line so it matches the Display Configuration labels.

Both the Label and the Condition expression should avoid using the word SELECT.

File Attach/Upload error: "You may not upload files with an extension of .XXXX."

Problem: Attempting to upload a file to ClientSpace either through dataform attachment or Email integration and you receive the following message: "ClientSpace.Business.pwInvalidFileExtension: You may not upload files with an extension of .XXXX. Contact the system administrator to request a change to the accepted file types or zip the file before uploading." (replacing .XXXX with the invalid file extension).

Cause: The File type you are attempting to upload has not been added to the list of Valid File Attachment Extensions. For example, the system allows .jpg files, but not .jpeg files.

Solution: Add the file extension to the Lookup group for ValidAttachExt, which will allow the file to be uploaded.

1. Go to **System Admin** > **Lookups**.
2. Click **Add**.
3. In **Group**, select **ValidAttachExt**.
4. In **Code**, enter the file extension with **no** periods (Example: jpg).
5. In **Decode**, copy and paste the Code value.
6. **Save** the record.
7. Try to upload your file again.

Import error: "Server Error accessing the file - Import failed."

Problem: Attempting to upload a file using **System Admin** > **Imports** > **Manage Import** and you receive the error "Server Error accessing the file - Import failed."

Cause: Improper Source File configuration on the import config that conflicts with an existing import. For example, creating an import config with a source file of EmployeeConversion*.csv when an employee*.csv import already exists.

Solution: Alter the Source File name in the Import Configuration to make it unique. Alter the name of the file being uploaded to match the new Source File value.

Import file macro error: "The path you selected may be bad"

Problem: You are attempting to create a CSV file for import into ClientSpace using the CreateClientSpaceCSV macro. When you attempt to save the file, you get a message "Error: The path you selected may be bad"

Cause: Some part of the save path you have chosen is missing or incorrect.

Solution: Correct the save path you are using. Some solutions for this are:

- **You are attempting to save to a directory that does not exist**: Create the directory first as the Macro save will not give you the option to create the directory as part of the Save function like Windows does.
- **You have not provided a file name for the CSV file**: You may be using an older version of this macro. The latest version attached to KnowledgeSpace should generate the file name based on the Worksheet Tab Name. If it doe not, simply append a file name to the path you are using for save, making sure to use the correct .csv file extension.

Merge error: "Call was rejected by the callee"

Problem: You are running a merge and when the system attempts to open the Office document, instead of opening Office you receive the error: "Call was rejected by the callee"

Cause: An instance of that merge is already open - likely with some kind of system prompt.

Solution: Sometimes when opening merges rapidly you will open a copy of the merge document, attempt to close it and then re-open the merge again. When this happens, it is not uncommon to miss the system prompt for "Would you like to save changes to document XXXXX?" These save prompts will block other instances of office from opening. You may also receive this if an instance of the office application is hung in the background.

1. Check to see if the office application is open and prompting you to save changes.
2. If so, save or cancel and close the currently open document.
3. If Office does not appear open, check the task manager to see if the application is not responding.
   - Right click the task bar at the bottom of your screen in Windows and select **Task Manager**.
   - Look for an instance of the Office application such as Word or Excel.
   - If you find an instance of the application that does not appear to be open on your desktop, in Task Manager, right-click the application and choose **End Task**.

Merge formula issues

Problem: When you open an Excel merge you receive an error such as "Excel completed file level validation and repair. Some parts of this workbook may have been replaced or discarded. Removed Records: Formula from /xl/calcChain.xml part (Calculation properties)"

Cause: Repeating row data above a formula in the workbook has caused the cell references in a formula to become broken.

Solution: Update the template document to move all of your calculations above the repeating row data on the worksheet. If you need this data presented below the repeating row information, hide the fields at the top of the workbook and point to these fields using cell references below the repeating row data.

Merge links produce error: "Object doesn't support this property or method code: 0"

Problem: PDF Merge Links no longer work - Get an error when clicking link "An error has occurred in the script on the Page Line 88 Char 9 Error: Object doesn't support this property or method code: 0 Do you want to continue running scripts on this page? Yes or No."

Cause: Pop-up blocker settings interfere with merge document opening.

Solution:

1. In your browser pop up blocking settings, add the domain name for your ClientSpace installation, such as *.clientspace.net
2. Click **Save**.

nwDataInvalidKey error

Problem: You are logged in and working in the system, then when you move to another part of the application you receive the error 'Error: nwDataInvalidKey - System Error'.

Cause: Browser has for some reason dropped the session and is no longer logged in.

Solution:

1. Close all browser windows and log back in.
2. Or in the browser, go to **File** > **New Session** and create a new session.
3. Then log back in through the new session and close the old.

Pricing error: "An error occurred executing the business rule: RecalculatePricing"

Problem: Attempt to save pricing and receive the error "An error occurred executing the business rule: RecalculatePricing. The ClientSpace Exception Log will contain more details about this error." This often occurs when attempting to open the Pricing Console. Checking the exception logs reveals something like "System.Data.SqlClient.SqlException (0x80131904): Arithmetic overflow error converting money to data type numeric."

Cause: One of the fields that is used in the pricing calculation has an invalid amount entered (too large). During pricing these fields are used in calculation and when multiplied by other fields can result in a value that cannot be represented by the system.

Solution: Correct the bad value and save the record.

1. Review each of the pricing dataforms (Pricing Batch, State, and Code) by opening **Workspace** > **Action Center** > **Dataforms** for the workspace in question to open a list of dataforms in the workspace.
2. Look for overtly large numbers stored in one of the form fields, such as 3000% in a mod field, or 1870000 in the employee count field.
3. Adjust the number to the actual (correct) number and save the record.
4. Try to open the pricing console again.

pwPermissionViolation when accessing linked dataform

Problem: You attempt to access a linked form from a dataform and despite having role access to the linked form you receive the error "Error: pwPermissionViolation - Permission Denied"

Cause: Some dataforms are not stored at the client workspace level, but instead centrally stored on the Admin Workspace, or another workspace such as the Sales Team workspace. If the user in question does not have access to the central workspace, they will receive a permissions error.

Solution: Provide access to the workspace where the form is stored.

1. Go to **Admin Workspace**.

1. Select the workspace in question.
2. In the **Action Center**, select **Users**.
3. Click **Add** to add new users to the workspace.
4. In **Add Workspace Users**, select the required users from the list.
5. Click **Ok**.
6. The new user is added to the list.

System exception: 'Out of Memory' error

Problem: You are unable to access different parts of the Application - most commonly the Client Workspaces. Application throws the error: 'System Exception: Out of Memory Error'

Cause: Possible server drive space issues. This sometimes happen if large log files or temp files were auto-generated by a server application.

Solution: Contact PrismHR:

1. Login to the Extranet.
2. Log an Extranet case. Provide as much detail as you can about how to replicate the issue.

The UPDATE statement conflicted with the FOREIGN KEY constraint "FK_gen_CompClaim_gen_AdminWorkersCompPolicy".

Problem: During a loss runs import the import log contains a generic "A business logic error was encountered for line...check the exception log ..."

Cause: The Comp Claim system in ClientSpace validates the information necessary to complete claim logging. One of these data items is the associated Workers' Comp Policy. The rule called by the comp policy import preprocess is HE_VerifyCompPolicyIsLocated. If you do not enable this rule on the Imports pipeline, the system allows the comp claim dataform save to happen without a verified fkAdminWorkersCompPolicyID. Subsequently the foreign key relationship that is expected later in the save process does not exist.

Solution: If you are importing claim information you must enable the HE_VerifyCompPolicyIsLocated rule on the Imports pipeline. This unfortunately causes imported records without a valid fkAdminWorkersCompPolicyID to fail.

Unable to open multiform search - Unending swirly

Problem: Attempting to open the dataform search for a multi-form and you get the "Loading..." graphic with the swirly - never loads the search.

Cause: A File upload datatype has been configured with the Form Searchable option selected. When the dataform search attempts to load the More search parameters it is unable to handle the File upload datatype.

Solution: Verify the field location. It will be on the dataform on which you are attempting to drill into the search. Use a debugger such as the one available in Google Chrome to capture the Client Side error and reveal the field in question. The error revealed begins with "Uncaught TypeError: Unable to process binding "controlWrapper: function (){return $.cs.csfileupload }""

Remove the Form Searchable attribute for that field under dataform admin:

1. Go to **System Admin** > **Advanced** > **Dataform Admin**.
2. Select the dataform where the error was occurring and search for the field in question.
3. Edit the field and clear **Form Searchable**.
4. **Save** the record.

Unable to open Pricing Console on Workspace. "System Error - An error occurred while attempting to process your request"

Problem: Attempting to open the pricing console on a particular Client Workspace fails with the Error: "System Error - An error occurred while attempting to process your request. If the error persists, please contact the system administrator." Checking the Exception logs under Admin Settings may reveal some form of Mathematical overrun error.

Cause: On open, the pricing console recalculates pricing, using the values stored on the Pricing Batch, Pricing State, and Pricing Codes dataforms, as well as defaults stored in various places throughout the system The most common issue responsible for this type of issue is bad data on one of the pricing dataforms, causing the pricing calculations to far exceed the limits of the fields in which the calculated values will be stored. Accidentally typing a large number of Employees on a pricing code form, or an extremely large percentage on a pricing modifier field will cause the type of mathematical overrun error in question.

Solution: Correct the bad data using the following steps:

1. Go to **Workspaces**.
2. Locate and open the workspace in question.
3. In the **Action Center**, from the menu, select **Dataforms**.
4. In **Workspace Dataforms**, search to find the Pricing Dataforms.
5. Open the dataform.
6. Carefully examine each of the pricing dataforms and find the offending bit of bad data, 1,000,000 employees on a pricing code, or a 3000% modifier would cause these types of issues.
7. Correct the bad data and Save the form.
8. Check the Pricing Console again.

Error: "New mask conflicts with existing data. Contact the system administrator for further assistance."

Problem: You are editing an existing dataform field that uses the decimal or percent datatype and you attempt to alter the mask value. Upon save you receive a message stating: "New mask conflicts with existing data. Contact the system administrator for further assistance." The record will not save.

Cause: The system allows the precision (numbers to the right of the decimal) of a mask to be changed when data has been saved into a decimal or percentage field, but the numbers to the left of the decimal point cannot be altered without significantly changing the value of the data stored in the field. For this reason, these types of changes are not allowed.

Solution: To adjust a decimal or percent field to alter the values left of the decimal, you must delete the field and recreate it on the form. Doing so deletes all the data stored within the field, so this action should not be undertaken lightly. If you have questions about the effects of deleting a field on your data or need assistance creating a solution, log an Extranet case.

Client stuck in Pending Termination

Problem: You have a client workspace that is in Pending Termination status and the status is not getting changed to Terminated by the scheduled process. The TerminatePending scheduled process normally compares the run date of the scheduled process and the Termination date on the Term form and any client where the termination date is equal to or lesser than the date of the scheduled process, and the Status is Pending Termination, the status is changed to Terminated.

Cause: Termination form Termination Date is set to a future date.

Solution: Update Termination Date and manually queue the terminate process.

1. Open the termination form on the client workspace and correct the date to today's date or earlier.
2. Go to **System Admin** > **Advanced** > **Scheduled Processes**.
3. Manually queue the **TerminatePending** scheduled process to term the client workspace.

Administration troubleshooting

Administering an application can have its challenges. Are you experiencing challenges? Try using the following solutions to overcome those obstacles.

"The request failed with the error message: Object moved" Error when running merge

Problem: You attempt to run a merge and you receive the error: "The request failed with the error message: Object moved"

Cause: The Merge template document is no longer attached to the merge under Merge Admin.

Solution: Update the Merge Configuration with a Template Document.

1. Go to **System Admin** > **Outputs** > **Merges**.
   The Merge Admin dashboard opens.
2. From the list, select the merge in question and click **Edit**.
   The Merge Admin Detail form opens.
3. In **Template File**, click (**upload**) and browse to the appropriate document.
4. **Save** your changes.

Allow Import option is cleared on Organization

Problem: The allow import option on the Organization record appears to be cleared somehow and nobody seems to know who is clearing it.

Cause: The system automatically clears this option when the Create Prospect link is selected in the header of the Organization.

Solution: Log an Extranet case.

Activity search is missing salesperson's activities

Problem: The Activity Search page on the Org is not displaying the Salespersons calendar events. If you log in as a global admin, the activities appear correctly.

Cause: Salesperson does not have access to the designated Sales workspace. Activities such as Tasks, Notes, and Calendar events need to be attached to a workspace. Before you select the Generate Quote link, a workspace has not been generated for the Organization, so any activity is attached to the default Sales Workspace set under **System Admin** > **App Settings** > **Default Workspaces**. If the salesperson in question is not set as a user of that workspace, the activities do not appear for them.

Solution: Add the Salesperson to the default Sales Workspace.

1. Find the default sales workspace by navigating to **System Admin** > **Advanced** > **App Settings**.
2. Go to **Workspaces** and open a workspace.
3. In the **Action Center**, in the menu, select **Users**.
4. Click **Add** and select the user from the list then click **Ok**.
   This action adds the salesperson as a valid user of this workspace.
5. Verify that the user can now see their Activities.

All Dataform fields disabled on an Active dataform

Problem: When opening a dataform, the form is marked as Active, but all the fields on the form are disabled. The form may or may not be secured.

Cause: The client workspace has been marked Inactive, so all associated forms are also inactive.

Solution: Re-Activate the workspace.

1. First, determine with the client if they want the Workspace to be marked as inactive. There are valid business reasons for this.
2. If this is not the case, go to the Client workspace in question.
3. In the **Action Center** menu, select **Settings**.
4. Select the **Active** option.
5. Click **Save**.

This action re-activates the workspace and all associated dataforms.

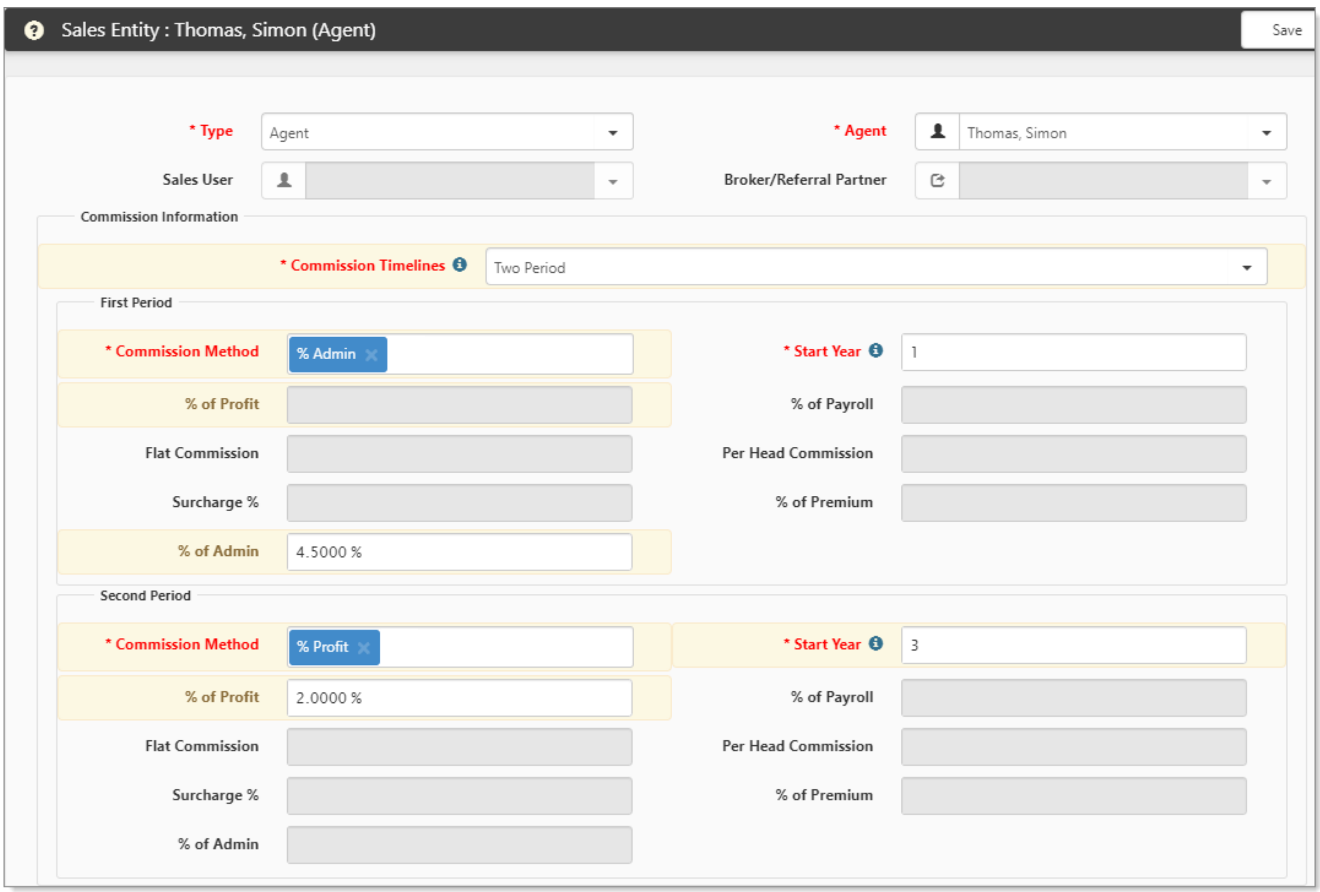
Calculated Commissions missing from Pricing Console Profit Matrix

Problem: When we enter a Commission Detail record on a Client workspace, the System does not show the calculated commission amount in the Pricing Console Profit pop-up matrix.

Cause: Misconfiguration of Sales Entity record causes Commission effective date to be set incorrectly.

Solution: Correct the Sales Entity configuration and manually change commission record date for all auto-generated records.

1. Go to **Admin Workspace** > **Sales** > **Sales Entity**.
   The Sales Entity dashboard opens.
2. Open the Sales Entity record in question and look at the Commission information recorded:



3. Sales Entity records allow you to set up to 3 tiers of commissions for each sales entity. In the example above the Sales Entity has two tiers or periods configured.
4. The first period starts the first year (1) of the Client's Contract Effective date and calculates commission based on 4.5% of Admin on the Client.

5. The second period starts in the 3rd year (3) of the Client's contract and calculates commission based on 2.0% of Profit on the Client.
6. So, if the Client's contract effective date was March 1, 2014, the Salesperson would be paid 4.5% of the admin fee starting March 1, 2014, and running through February 28, 2016, then starting in the third year of the contract (March 1, 2016)
7. The salesperson would be paid 2.0% of the Admin collected from the client.**

After correcting the Sales Entity record you will need to fix the Sales commission detail records for each affected workspace.

1. Go to the workspace in question and open the Commission detail records for the affected Sales user or Agent.
2. Update the **Effective Date** field on the Commission record to the appropriate value. This effective date is calculated on Workspace creation using the Contract Effective Date and the Start Year information configured above on the Sales Entity record.
3. **Save** the commission detail record(s) and review the Profit Matrix on the client again to ensure commissions are being calculated properly.

Information about Sales Entity Configuration can be found by reviewing the contextual help text. On any dataform, point to the field label and if the label changes color, then there is related help text to be found by clicking the label.

Cannot Login or Assume an external user

Problem: A user cannot login and as a Global Admin you are unable to assume the external user.

Cause: The external user account is linked to a template workspace.

Solution

1. Go to **System Admin** > **Users**.
2. Search for the user.
3. Change the Default Workspace to that user's company workspace.

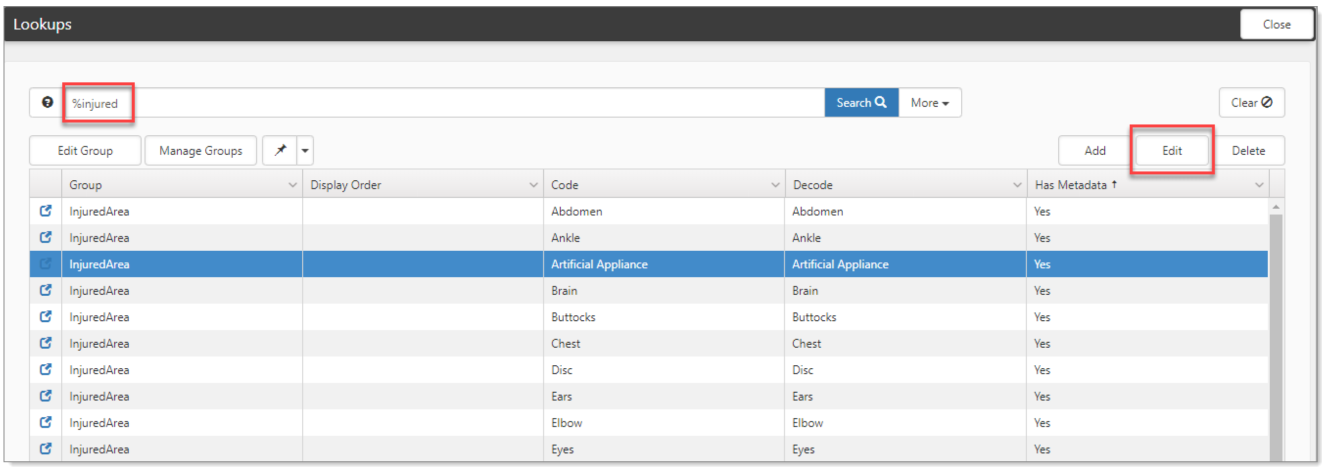
Cause, nature of injury, or body part missing on Workers' Comp Claim

Problem: The cause, nature, or body part drop-down list is not appearing when filling out a Workers' Compensation Claim.

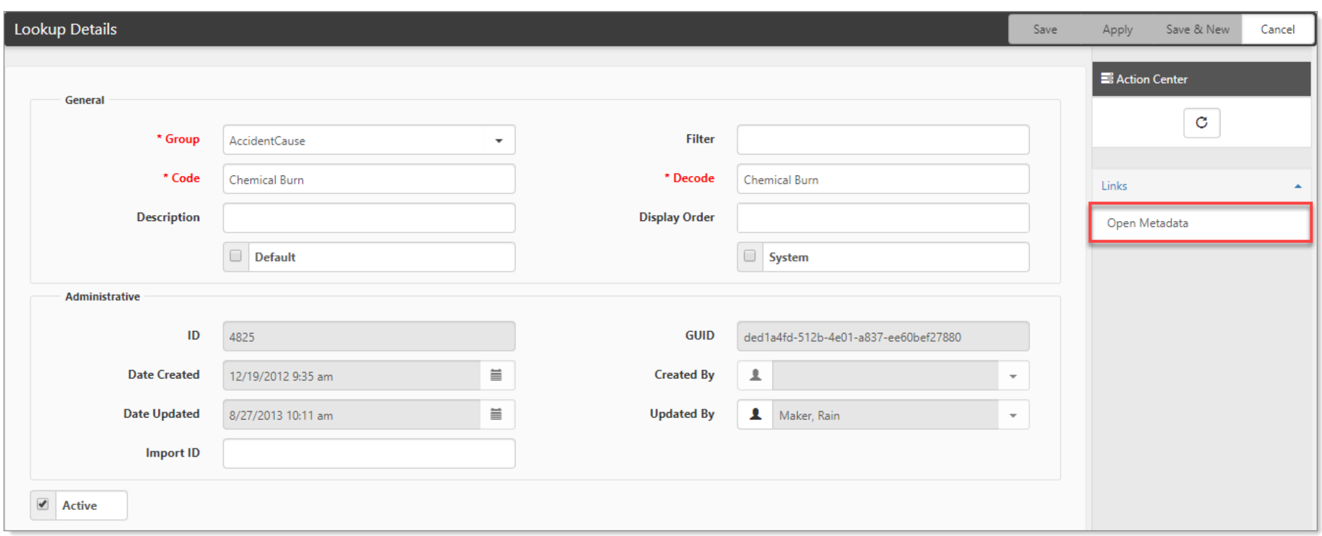
Cause: The metadata form for each of those fields is not configured.

Solution: The metadata form needs to be set on the Lookup Group detail.

1. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens. The lookup groups that correspond with the three lookup fields are **AccidentCause**, **TypeofInjury**, and **InjuredArea**.



2. Locate a lookup group and click **Edit**.
   Use the **%** quick search to quickly locate each one.
   The Lookup Details form opens. The following example shows the Lookup Details for AccidentCause.



3. In the **Action Center**, click **Open Metadata**.
   The metadata form opens.
4. For the lookup group in question, select a value.
5. Click **Save**.
6. Repeat the procedure for each group: **AccidentCause**, **TypeofInjury**, and **InjuredArea**.

After the metadata is configured, each individual drop-down value in the detail fields can be configured to show or hide based on the selected Category field.

Certificates of Insurance are not being emailed properly

Problem: A ClientSpace user completes and authorizes a Certificate of Insurance, and an email is sent to the Certificate Holder appropriately, but the person who authorized the Cert will sometimes not receive the email.

Cause: The system is designed to automatically email the Certificate Holder and the person who created the certificate, not the person who accepts or authorizes the certificate. If these are the same person, they will receive the email, but if the certificate is created by person #1 and accepted / authorized by person #2, only person #1 will receive the email.

Solution: If you are authorizing a cert and were not the creator of the cert:

1. In the **Action Center**, click **Subscribers**.
2. Add yourself to the notification list on the cert manually.

Client stuck in Pending Termination status

Problem: Customer has a client workspace that is in Pending Termination status and the status is not getting changed to Terminated by the scheduled process. The TerminatePending scheduled process normally compares the run date of the scheduled process and the Termination date on the Term form and any Client where the Termination date is equal to or lesser than the date of the scheduled process, and the Status is Pending Termination, the status is changed to Terminated.

Cause: Scheduled process has not run.

Solution: Manually run the scheduled process.

1. Check the scheduled process by going to **System Admin** ⚙ > **Advanced** > **Scheduled Processes**.
   The Scheduled Processes Admin list is displayed.
2. From the list, look for **Terminate Pending**.
3. Make sure it is scheduled properly, specifically look at the next run date. The scheduled process is typically set to run hourly at least every weekday and the next run date should be today.
4. If the Next Run Date is set to a future date, change it to today and manually run the scheduled process.

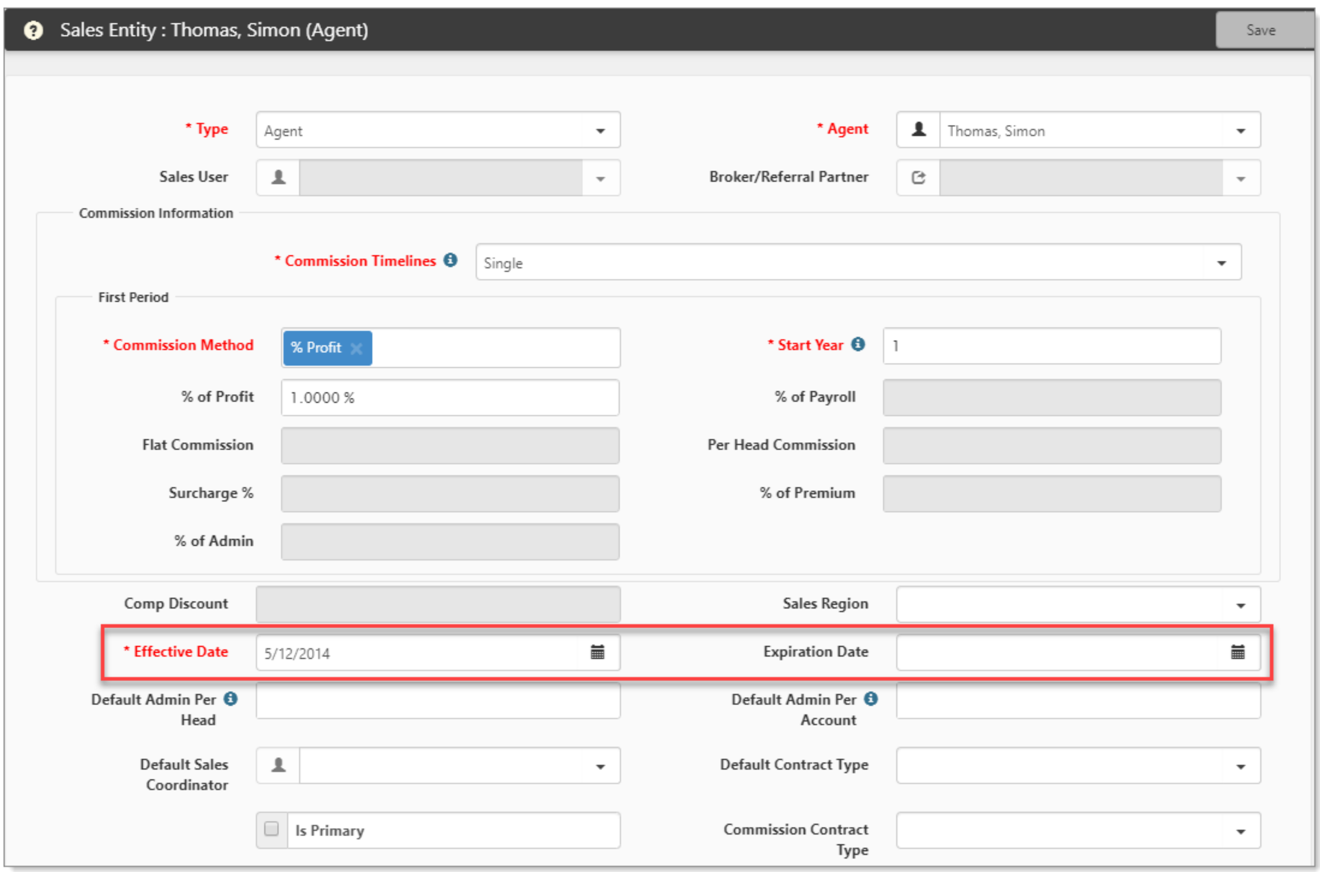
Commissions not included in gross profit calculations

Problem: Salesperson commissions are not included in Gross Profit Calculations.

Cause: Effective Date of the Commission record is set to a future date, so it is not included in pricing calculations.

Solution: Either add a current commission record or edit an existing record to make the effective date less than or equal to the current date.

1. From the modules bar, select **Admin Workspace**.
   The Admin Workspace tiles display.
2. Select **Sales Entity**.
   The Sales Entity dashboard opens.
3. From the list, select the salesperson in question and click **Edit**.
   The Sales Entity form opens.



4. Check the **Effective Date** on the record.
5. If the commission structure is age banded, a new record may need to be created to cover the current time period.

6. Otherwise, edit the existing record to include the current time period by changing either the **Effective Date** (start) or **Expiration Date** (end) of the existing record.
7. **Save** your changes.

For more information about the PEO pricing system and how commissions work, log an Extranet case.

Configured links do not display in form header

Problem: You have configured a custom link, but when you go to a dataform with the configured link, sometimes it does not display.

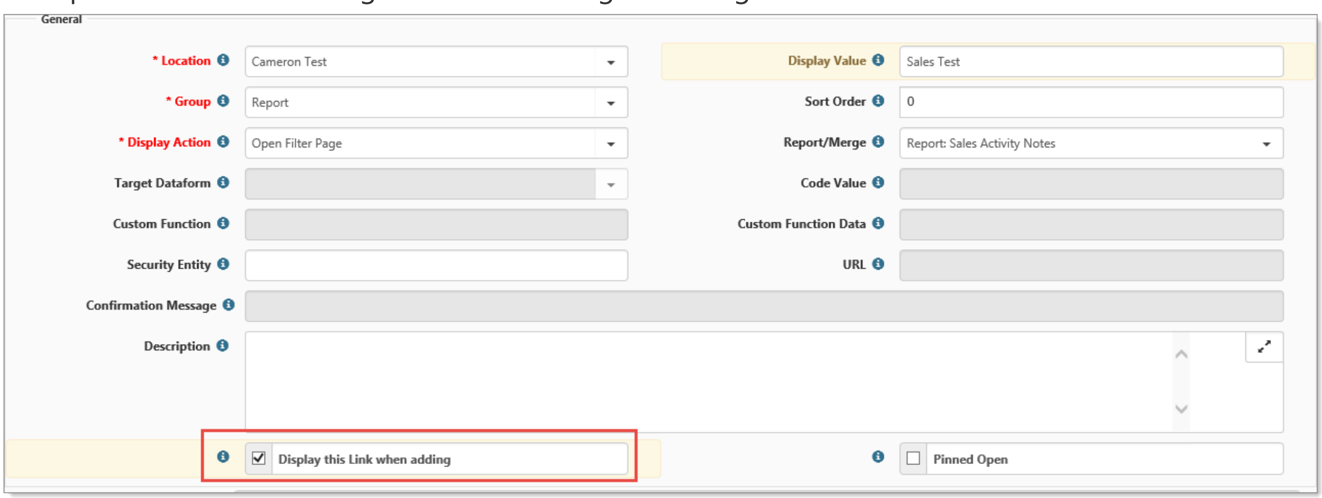
Cause: The dataform is a single form and has actually not yet been saved. Because the system dynamically generates the fields when you open the dataform, it looks like the form is there, when there is no copy of the form attached to the workspace.

Solution: Make changes and save the form or set the Custom Link to **Display when Adding**.

Dataform Links require a dataform in which to attach.

Two ways to resolve this:

- Any change that is saved to the dataform causes the page to re-load, which loads the header and display the links.
- Alternately you can set the link to display on Add by selecting the **Display this link when adding** option on the link configuration and saving the change.



Critical case notifications being received by users not working on the case

Problem: You have departmental manager users that are receiving case notifications for Client Service Cases in which they are not the Owner or Assigned To.

Cause: There is logic in the system when the priority is Critical to also notify the Admin Role for the Assigned To Department. For example, the Users in the Benefits Reconciliation and Administration_ Admin role were notified because the Assigned To user is in the Benefits Reconciliation and Administration Department.

Solution: There is no way to disable Critical Case notifications on a per person or department basis. It is not recommended to disable them for an entire organization.

CSC Escalation Notices not being sent to escalation users

Problem: A user has been set as the level 1 or level 2 escalation user on a particular Client Service Case type, but they are not receiving notices, or are receiving them outside of the expected escalation times.

Cause: Misconfiguration

Solution: Several items need to be configured properly for these escalation notices to be delivered to the appropriate users.

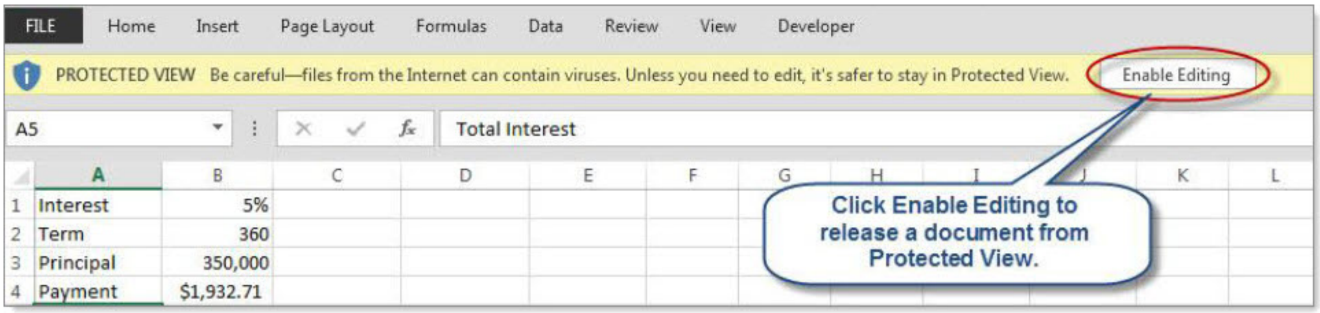
1. The ServiceCaseNotification scheduled process needs to be configured to fire at or less than the lowest escalation time, otherwise you can create cases with 1 hour escalations but the notifications will only cue up for the next run of the scheduled process.
2. To be notified, the user needs to be in a role containing the entity biz_ClientServiceCase_Email_ Notifications.
3. Check if the user is in a role containing this entity by going to **System Admin** > **Security** > **Roles**.
4. Add Search filters for the User Name and the Entity Name **of biz_ClientServiceCase_Email_ Notifications**.
5. Click **Search**.
6. If there are no results, remove the Entity Name search parameter and re-search.
7. Edit an appropriate role and Add the **biz_ClientServiceCase_Email_Notifications** with **View** rights.
8. **Save** the record.

Data will not merge to Presentation tabs on Excel Merge

Problem: You attempt to run an Excel merge and the data appears to be merging to the Data (CSExport) tab, but none of your formulas or presentation tabs seem to work.

Cause: Server Side Merge does not have rights to Edit document. The older Security Policy Editor method obtained these rights by default.

Solution: Allow the data to process to the other tabs by clicking **Enable Editing** at the top of the Excel document.



Dataform not listed within the drop-down list

Problem: When creating a new or editing an existing scheduled template task trigger, the dataform that you wish to trigger the task from is not listed.

Cause: The Task Trigger dataform list will not show tab dataforms.

Solution: Use main dataform when creating trigger.

To schedule a task off a field on a tab dataform:

- Select the main form and the tabbed fields will appear listed with the main form fields.

Dataform or Task fields do not enable

Problem: Trying to save changes to an inactive Task or Case, most commonly trying to re-activate using a Header Link, but the Form remains disabled.

Cause: Form is attached to a disabled workspace.

Solution: If changes to the form are necessary, you must re-activate the workspace to make the changes.

1. Go to the workspace in question. To find inactive workspaces, from the Clients list, in **More**, select **All**.
2. From the list, select the workspace in question and click **Edit**.
   The Client form opens.
3. At the bottom of the Client form, select the **Active** option.

4. **Save** your changes. You will then be able to update your task or Dataform.
5. When completed, determine whether the Workspace should be inactivated and if so, reverse the steps to activate the workspace.

Delete Role is not working

Problem: The Delete button in Role Admin does not appear to work. You get a confirmation pop-up and click Yes. The role row disappears from the list, but it is back when you Search.

Cause: If the role being deleted is a Departmental Role (_Member or _Admin), they are System Roles and are linked to the department.

Solution: You cannot delete roles with **_Admin** or **_Member**. These roles are associated with Departments and the association keeps them from being deleted. If you need to delete the entire department and associated roles, log an Extranet case. There are possible repercussions when making this change. Configuring Organization and Workspace Security.

Duplicate Employee in Dataform list

Problem: Open a Client Workspace and go to Employees and one or more of the employees in the list appear to have duplicate records.

Cause: Inner Join in List Select statement causing multiple rows to come back due to multiple active Employment records.

Solution: Inactivate the appropriate Employment record.

To inactivate the appropriate Employment record, you must first understand how the historical employment records are generated. When a change for an employee job history (employment) record arrives in the system, the original record is cloned, and then inactivated. The original record is then updated to reflect the new changes before being saved. This process should leave only one record in the system with the IsActive flag selected. Sometimes however this process may fail, leaving multiple employment records marked as IsActive.

The Employee dataform list will erroneously join the employee once to each of these records, resulting in a list containing seemingly duplicate employees when there is in fact only one employee records and multiple employment records.

To correct the issue:

1. Open one of the employee records.
2. Using the header link, open each employment record and look at the Administrative fields at the bottom of the records to find the RecordID.
3. The Employment record with the lowest ID number (oldest record) should remain Active. (IsActive option should be selected.)
4. All other Employment records for this employee should have the IsActive option cleared to inactivate them.
5. Remember to **Save** your changes.
6. As you inactivate these Employment records, you will see the duplicate employee records eliminated from the list.

Duplicate Employment records in ClientSpace

Problem: In reviewing Employee Information in ClientSpace, it is reported that some employees have multiple employment records, all but one of which are inactive.

Cause: Employment is a historized form - storing a historical track of Employee job changes.

Solution: During the historize process the current record is cloned when there are changes and then saved as inactive, then the current record is updated and saved as the IsCurrent record. This is done to preserve the foreign key relationships between the Employment record and any child records it may have such as I-9 records. There should only be one active employment record at any given time.

Error when using Pricing Workflow: "This RFP cannot be submitted because there is a lock on this FEIN."

Problem: You are attempting to move a Client Workspace through the pricing workflow. The workspace has related companies already in ClientSpace when you receive the error: "This RFP cannot be submitted because there is a lock on this FEIN."

Cause: Related Client Workspace is locked to prevent accidental duplication of FEIN on unrelated companies.

Solution: Unlock related Workspace

1. Find the related workspace that is already in Client status and navigate to the Client Master using Workspace Search.
2. Clear the **Locked** option and **Save** the record.
3. Try moving the new workspace through pricing again.
4. The appropriate workspace will be locked during the pricing process.

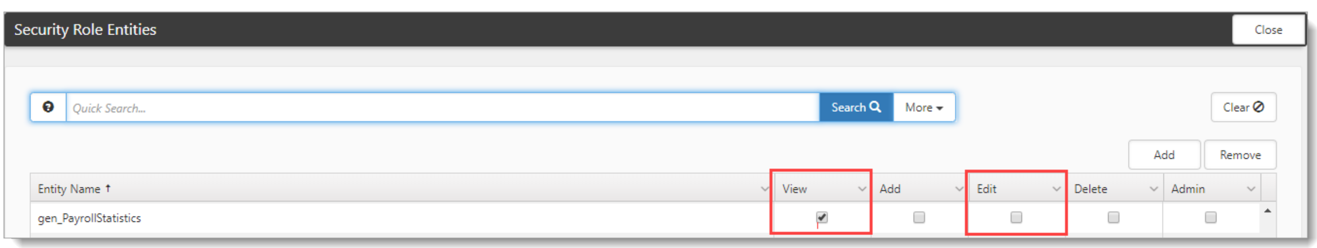
Field security behaving differently in NEXT

Problem: Security behaves differently in NEXT than it does in Classic in that in Classic users have access to the fields in a specific fieldset, but in NEXT they do not.

Cause: In Classic, a secured fieldset only needed View rights to edit the fields inside it. In NEXT, the user needs to be in a role with View and Edit rights.

Solution: Add Edit rights to the Role that includes the fieldset Entity in question.

1. Go to **System Admin** > **Security** > **Roles**.
   The Security Roles dashboard opens.
2. Search for Roles with the security entity in question. This should be in the format gen_ DataformName_FieldsetName.



3. Ensure that you update the role selections to include **View** and **Edit** as in the example.
4. **Save** your settings.

Field value still required on Dataform cloning trigger

Problem: You are attempting to set up a trigger condition for Dataform Cloning using the Empty or Not Empty options, which should not require a Dataform Field Value, but that field is still required to be able to save the form.

Cause: Bug in the JavaScript on the page.

Solution: Fill the Dataform field value with a value which is appropriate for the Trigger field and save the form. The value clears and the Dataform field value marked not required on Save.

Limited or no access to Workspaces

Problem: You have a user working in the system, but they do not appear to have access to all workspaces. Some of them don't appear in the Workspace Search list.

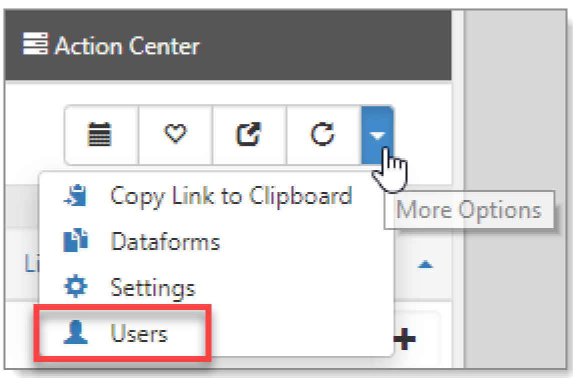
Cause: User account is not on the Template Workspace User List.

Solution: Add the user account to the template user list.

To add users to the Workspace list:

Add the User directly to the Workspace. This may be necessary for installations that have lots of Workspaces, or complex TOC security.

1. Go to **System Admin** ⚙ > **Workspace Templates**.
   The Workspace Template Search dashboard opens.
2. Open the workspace template in question.
   The template opens.
3. In the **Action Center**, select **More Options** > **Users**.
   The list of users that are pre-filtered for this workspace are displayed.



4. Click **Add**.
   The Add Workspace Users form opens.
5. From the list, select the user in question and click **Ok**.
   The user is added to the Workspace Users list.

Missing Create Prospect link on Organization Header

Problem: The Create Prospect link does not appear on the header of Organizations.

Cause: Missing security

Solution: The Create Prospect link has its own security and logic behind it that determines how it presents. For this link to be available, the user must have edit rights to the organization, either through their user or a role in which they are a member being present on the security tab of the organization with Edit rights to that Org. There is also template logic that determines how the link will react when selected. If the user has access to a single template, the Create Prospect link will create a workspace from that template. If the user has access to multiple templates, the Create Prospect link will present the user with a list of these template workspaces and allow them to choose which one to clone. There are two security Entities that come into play in the PEO system for displaying and populating the Create Prospect link: the **CRM** entity as well as the **template_ YourTemplateName_member** entity.

1. First, the user will either need to be a Global Admin, or be included on the Security tab of the Organization in question with Edit rights to the Organization (normally either the Sales user that created the organization or the Admin for that users default department).
2. The user will also need to have the **Can Create Workspaces** option selected on the user profile.
3. The CRM Entity controls Organization access. To generate workspaces from an Organization, you will need Edit access to the organization.
4. Workspaces are generated from templates, so to have access to this functionality, the user will need template member access.
5. The format for template member entities is the template name, bracketed by the words 'template' and 'member so: 'template_YourTemplateName_member'.
6. Both of these entities should be added to a role in which the user belongs under the Role Admin dashboard located under **System Admin** > **Roles**.

Options missing when you add filters to Ad-Hoc Report

Problem: You are creating an Ad-Hoc report and when you add multiple filters to the report, some of the filters do not have all of the options that you would expect.

Cause: Filters in the Izenda reporting tool are additive, so if the first filter in say a pricing report selects only workspaces in the Prospect status, the second filter for Pricing State will be affected - if there are no Prospects in Georgia, Georgia will not appear as a valid option in the Pricing State filter list.

Solution: If you do not want this behavior to occur, simply move your least restrictive filters to the top of the filter definition page. In the example above, moving the Pricing State filter above the Status filter will resolve the issue.

Organization created via SFDC API Assigned To incorrect user

Problem: Organizations created through the SFDC API are being generated with an AssignedTo user of Salesforce Service, instead of the appropriate sales user.

Cause: No matching (or blank) Sales user email address in ClientSpace or Salesforce.

Solution: Check the Sales user account email address in ClientSpace and Salesforce. If the values do not match, update one or both email addresses so they are identical in both systems, then re-run the Salesforce Sync.

Organization dashboard list crashes on open

Problem: You are attempting to open the Organization Dashboard, but on open, when the list refresh should happen, no records are returned, and the entire list disappears.

Cause: Timeout issue on the initial load of data into the list. This is caused by too many records being returned in the default search.

Solution: Reset the default rows per page returned to the list.

1. Go to **System Admin** > **Advanced** > **App Settings**.
   The App Settings form opens.
2. Check the **Rows per Page** setting. It is likely set to a very high number.
3. Reset the **Rows per Page** to a more reasonable number, we recommend 250.
4. **Save** the record.

Payroll statistics getting regenerated causing duplicate statistics for PayPeriods

Problem: When reviewing Client payroll statistics information, you find the PayPeriod amounts are double, triple or even more times greater than they should be.

Cause: Missing data fields on the Voucher import records, or mis-configured Import Configs cause the fkPayrollStatisticsID to not get updated, which in turn causes dupe Payroll Statistics records to be produced.

Solution: The process that generates the Payroll Statistics records and updates the vouchers uses many concurrent Voucher record fields to tie these records together - these fields include Voucher.State, Voucher.CompCode,, Voucher.STARTDATE, Voucher.ENDDATE, Voucher.PAYDATE, AND Voucher.PAYCYCLE. If any of these fields are missing either from the Import Config, or the Voucher record that is being produced from the payroll system, the Voucher updates will fail. The following steps will help to determine the cause, and associated resolution for the issue.

1. Go to **System Admin** ⚙ > **Imports** > **Manage Import**.
2. Examine the Import Configuration for the Voucher files, and make sure that each of the fields: Voucher.State, Voucher.CompCode, Voucher.STARTDATE, Voucher.ENDDATE, Voucher.PAYDATE, AND Voucher.PAYCYCLE, are in the configuration. Make note of the appropriate field name from the voucher file being produced by the payroll system.
3. If any of these fields are missing, update the Import Config to include them by first showing inactive fields, and re-activating the field for import. If the field is missing, add it to the import configuration.
4. If all of the fields appear on the import configuration, the problem most likely is in the imported file itself.
5. Check the Voucher file by going to **System Admin** > **Imports** > **Manage Import**.
6. Open the record in question by double-clicking in the list or highlighting the record and selecting **Details**.
7. Choose **View File** and look for each of the above fields, ensure the column names match the import configuration and that the columns hold data. If they do not, correct the issue.
8. When you are sure the fields are properly named, populated and configured for import, and can see the fields being filled on the voucher records, create an Extranet case to have the duplicate Payroll Statistics records removed from your system, and the newly generated records synchronized with the associated voucher records.

If you are unable to determine the cause, or unable to re-configure your imports, log an Extranet case.

Pricing Console is not showing external commissions

Problem: There are zeros listed for external commissions in the client pricing console, even though there is a broker attached to the client.

Cause: The Effective Date of the commission record is set for a date not yet recognized by the system as it is in the future. This makes the commissions not effective at the current time.

Solution:

1. From the Workspace landing page, at the bottom, select **Sales** > **Commission**.
   The Commission dashboard opens.
2. Select the appropriate commission record.
3. Change the **Effective Date** to a date prior to or the current date. Example: Today's date is 5/1/15, change it to 5/1/15 or an earlier date such as 4/15/15.
4. **Save** the record.

The system will now recognize the commission record as being effective.

Quick Create link displaying on Client Master

Problem: The quick create link (Add Codes) is displaying on the Client Master page in ClientSpace. This link should be hidden on the Client Master so that codes may only be added through the Pricing Console.

Cause: Custom Link configuration has been changed to remove the Pinned Open configuration

Solution: Because of the way the links are generated in the right navigation menu, this link needs to be Pinned Open. The right navigation dynamically generates and displays the list of unpinned links, so the quick create link that was hidden when the page loads, is dynamically re-added to the page when you select More. Edit the Custom Link configuration for this link and ensure the Pinned Open option is selected.

Receive hard error on Pricing Submit: Workers' Comp Below Cost

Problem: You are a Global Admin attempting to submit pricing with deep Workers' Comp discounts, but the system throws a hard error about the Comp Pricing being below cost.

Cause: There is validation that happens during the submit process to ensure the cost to billing ratio is not exceeded. In some cases, however, you may want to forgo these validations as you will make up any losses through another portion of pricing.

Solution: Disable the validation on submit using the Override Validations option on the Pricing Batch dataform. Select this secured option will allow a Global Admin or administrative user with appropriate rights to skip the pricing validations for this batch.

Report is missing columns in Business Intelligence

Problem: You have designed an Ad Hoc report and when you view it in Ad Hoc Reporting it is too wide for the page, but a scroll bar allows you to access the missing columns. Opening the report in Business Intelligence however these columns are missing and inaccessible.

Cause: **Enable Responsive Design** feature is enabled on the report. This feature, introduced in a version 6.9.0.6 of Izenda reporting makes the report columns responsive to changing page size, such as on a tablet or mobile device and removes columns from the right side of the report to allow it to fit the current screen. This will even drop columns on long reports that will not fit within the monitor space. This feature is enabled by default on reports.

Solution: There are multiple solutions to this issue which you use should be based on how frequently the report is accessed and in what format

Resize solution: Report is mostly used on a monitor and fits within the screen:

For cases where the report will rarely need to be resized because it is not used by mobile users and fits nicely into the desktop real estate we recommend changing the zoom level in the browser - this is easy for the end user to do without having to make changes to the report that would affect all users. To change the zoom level:

Internet Explorer: Do **one** of the following:

- Press **Ctrl** and use the scroll wheel of your mouse or use **Ctrl -** (Control + Minus or Dash key) to zoom out
- OR use the Zoom level in the lower right corner of the browser to adjust the zoom to an appropriate level.

FireFox: Do **one** of the following:

- Press **Ctrl** and use the scroll wheel of your mouse or use **Ctrl -** (Control + Minus or Dash key) to zoom out.
- OR use the Zoom by going to **Settings** > **Zoom** in the upper right of the browser to adjust the zoom to an appropriate level.

Chrome: Do **one** of the following:

- Press **Ctrl** and use the scroll wheel of your mouse or use **Ctrl -** (Control + Minus or Dash key) to zoom out.
- OR use the Zoom by going to **Settings** > **Zoom** in the upper right of the browser to adjust the zoom to an appropriate level.

Change Report Settings: Report does not easily fit within the monitor screen area

When you do not want to constantly resize the report and it is rarely used by mobile applications that would require responsive design, you can disable this feature on a report by report basis.

1. Open the report in design mode.
2. Click the **Style** tab of the report.
3. Go to the series of options that affect page visualization.
4. Clear the **Enable Responsive Grid** option.
5. **Save** the report.

Scheduled Processes not running, not stuck in running state

Problem: Client calls because their scheduled processes, such as send mail, do not appear to be running, but they are not hung up in the running state.

Cause: There is a scheduled process on the Virtual Hosting server (Extranet) that kicks off the scheduled processes on the hosted client sites. If this process hangs up on Extranet, it will never start the client processes.

Solution:

1. Open the Extranet and go to **System Admin** > **Scheduled Processes**.
2. Check the Scheduled Processes to see if the Kickoff Client Processes is stuck in the Running state.
3. If so, edit this process and clear the **Running** option and click **Save**.
4. Manually re-run this process by selecting it in the list and clicking **Run Process**.

SendMail or other Scheduled Process does not appear to be working

Problem: Client calls because a scheduled process they expect to have run (SendMail for example) does not appear to be working. When you examine the scheduled processes, the one in question has a last run time and is active. The process also appears to be currently running.

Cause: Sometimes the scheduled processes will hang - they start, but then fail prior to completion. If this happens, the Running flag that is set at the beginning of the scheduled process never gets reset, since the system only allows one instance of a running process, it will not restart until the Running flag is reset.

Solution: Reset the Running flag

1. Manually open the scheduled process and clear the **Running** option to reset this flag.
2. **Save** and close the record.
3. Manually run the process using **Run Process** from the Scheduled Process dashboard.

Terminated user still appears in drop-down lists

Problem: You have an ex-employee who has been terminated, their ClientSpace account de-activated, but the user name still appears in drop-down lists such as on the Client Team dataform.

Cause: Inactive user is still a Role Member for the role associated with the list.

Solution: Clean up user roles

You can cleanup user roles by removing users from the role or removing roles from the user.

CASE 1: Remove the user from the Role:

1. Find out which role is associated with the lookup field (drop-down) that you need to fix by going to **System Admin** > **Advanced** > **Dataform Admin** > **Form Fields**. The role is represented by the alphanumeric string stored in the Related Fields field.
2. Copy the info in the Related Fields area and go to **System Admin** > **Security** > **Roles** and find the Role ID that was stored in Related Fields.
3. Open the record by clicking **Edit** or double-clicking the row.
4. Select the **Users** tab.
5. Select the **Show Inactive** option and search.
6. You should now be able to highlight and delete the user name from the role list.

CASE 2: Remove the Roles from the User:

1. Open the user profile in question by going to **System Admin** > **Users ~User Profile~** > **Roles**.
2. Select each of the Roles on this tab and delete them.
3. **Save** the record.

Current Year is not available for OSHA Reports

Problem: You attempt to run the OSHA or OSHA 300 report in ClientSpace, but the Year that you need to run the report for is not available in the filter criteria.

Cause: The current year lookup has not been created yet. These reports utilize a special lookup group called OSHAYear

Solution: Add the necessary years to the OSHAYear lookup group. See To add values to the new group: in Configuring lookups.

Third Party Application Key was not found

Problem: Client attempted a third-party login to the Extranet via the ClientSpace Module and receives the error "The third party application key was not found. Click the button below to login."

Cause: The Third Party Application Key has not been set up properly on either the Client site or the Extranet

Solution: Log an Extranet case for assistance in configuring the Third Party Application Key.

Unable to Add State or Code to Pricing using Quick Edit

Problem: A ClientSpace user attempted to add a WC state and code to the pricing console prior to submitting the deal to underwriting and he received an error message - "An error occurred executing the business rule: Recalculate Pricing."

Cause: Insufficient Rights on the Quick Edit form. This form has required fields that can be secured, if the user does not have view rights to the fields, they disappear and cause the error.

Solution: Update one of the user roles to have at least View rights to all applicable fields on the Quick Edit form (Or create a Quick Edit Role). Ensure the user in question is a member of that role.

Unable to approve Comp Code

Problem: You are attempting to approve pricing and every time you try to clear the Needs Review option on a Pricing Comp Code, it gets re-selected on Save.

Cause: The Comp Model is not set on the associated Pricing State Master dataform.

Solution: The Comp Model needs to be set on the associated Pricing State of the Pricing Console on the Workspace that is having problems.

1. To keep this from reoccurring, the Comp Model needs to be changed in the Admin Workspace.
2. Go to the **Admin Workspace** > **State Master** and select the state that the comp code is in.
3. Set the Comp Model for the State and **Save** the record.

Unable to change Contract Type or Legal Entity after Pricing submission

Problem: You have submitted a deal for pricing but realize the Contract Type or Legal Entity listed on the Client Master is incorrect. When you attempt to edit these fields, even as a Global Admin, they are read-only.

Cause: Contract Type and Legal Entity settings can factor into pricing, and can change pricing dramatically, so these fields are locked by design during the submission process.

Solution: Re-price the deal. Re-pricing a deal effectively resets it, unlocking these fields for edit.

Unable to see Activities

Problem: You have a user that is in roles with the CRM Entity, but they still do not see any Activities on the workspace dataforms.

Cause: Missing Organization Access

Solution: Because Activities are tied to the Organization record, for a user to access those notes they need not only the CRM entity on one of their user roles, but access to the organizations in question. If this is a Sales user, this access automatically shows up as they create Organizations and associated Workspaces. For Non-Sales, internal users, they need to either be added to the security tab of the Organizations for which they need CRM Note access or added to a role that has CRM Admin access.

Unable to view or download Organization attachments

Problem: Organization users do not have access to view or download attachments from an ORG

Cause: Affected user does not have access to the CRM Attachments workspace.

Solution: Prior to a workspace being created, any attached items need to be associated with a workspace, so the system uses the CRM Attachments workspace. Add the affected user to security on the CRM attachment workspace using the following steps:

1. First, determine the workspace in your installation that is being used as the default Sales Workspace. This can be found in App Settings.
2. Go to **System Admin** > **Advanced** > **App Settings** > Default Workspaces to find the name of the default sales workspace.
3. You can provide Workspace access to a single user by opening the user profile under System Admin | Users | Edit user, selecting the Workspaces tab and choosing Add to search for the default sales Workspace name and add this workspace to the users Workspace list.
4. **Save** the user record.

Unintended Case Notifications being sent

Problem: A critical case was logged, and many users were notified who were not on the notifications list for the case.

Cause: The Business Rule **Send Notifications** notifies members of the associated Department Admin role for the Assigned To user when a critical case is created.

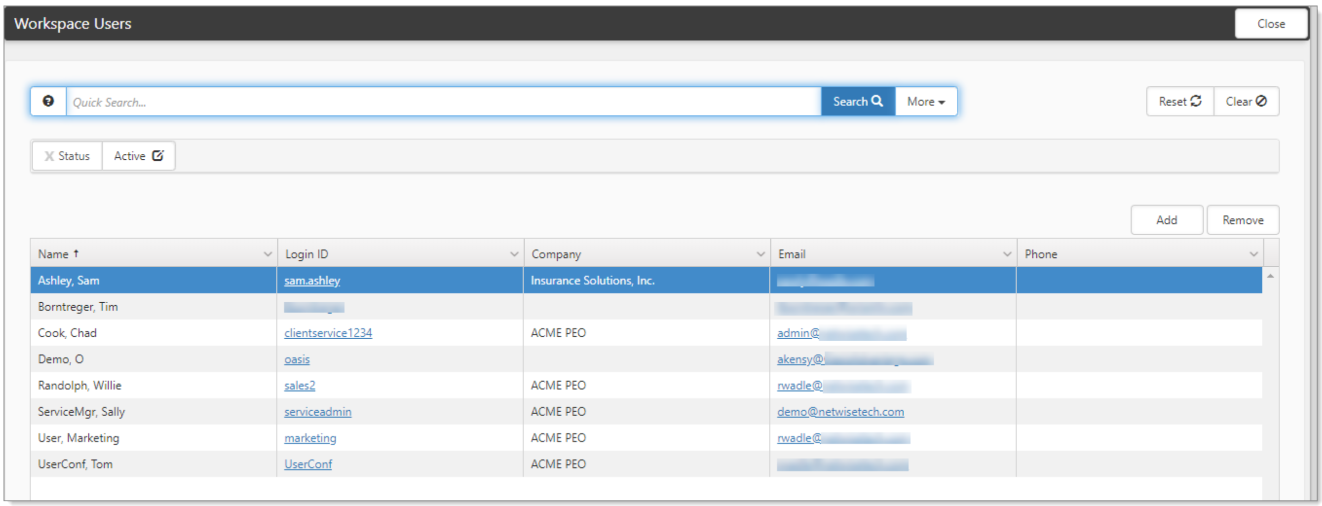
Solution: The Send Notifications business rule is core functionality of ClientSpace, which controls all case notifications. You may want to consider cleaning up the Departmental Admin Roles in ClientSpace to remove non-essential users. If this does not fit your business model, log an Extranet case to discuss custom development.

Users not available when adding Activities to an Organization

Problem: You attempt to configure an activity such as a Calendar event on a ClientSpace Organization, but the user you would add to the Calendar attendees is not available from the Attendee list

Cause: The user in question does not have access to the CRM Sales Workspace.

Solution: Prior to an Organization having a workspace generated and becoming a Client, the Org does not have its own related workspace. These pre-workspace organizations will all share a workspace called CRM Sales Workspace.



To make the users available for activities, you need to add them as users of this workspace:

1. Open the workspace in question.
2. In the **Action Center** menu, select **Users**.
   The list of users with access to the workspace are displayed.
3. Click **Add**.
   The Add Workspace Users dialog box opens.
4. Select the user and click **Ok**.

There will be a slight delay while the workspace provides this user access.

Users not listed in drop-down list

Problem: On the task notification list, not all the users are listed.

Cause: This list shows all users that have access to the Workspace the task is associated with. If the task is not associated with a workspace, then the task is attached to the CRM Sales Workspace.

Solution: The User needs to be added to the Workspace. There are two ways this can be done.

1. Go to **System Admin** > **Users**.
2. Open the user's profile.
3. In the **Action Center**, click (**Workspaces**).
4. Add the Workspace to that tab to give access to the workspace.
5. Go to the Workspace, and in the **Action Center** menu, select **Users**.
6. Click **Add** to open a list of users.
7. Select the User and click **Ok**.

Note: By giving a user access to a Workspace Template, you are giving that user access to all Workspaces created from that template.

View File does not give the Open option, only Save

Problem: You attempt to click on a linked file to open it, and instead of getting the dialog that allows you to either Open or Save the file, you only have the option to Save.

Cause: File name to long causing truncation of file extension.

Solution: Check the length of the file name. Extremely long file names can push the file extension past the field limitations, truncating the file name and dropping the extension.

- If this has happened, save the file with a shorter file name and the proper file extension, then re-attach the file.
- The Open option will then be available.

Workflow does not always work appropriately

Problem: Automated business rules can be used to process workflow and sometimes do not work as expected.

Cause: Business Rule trigger conditions are not being adequately met in the expected order, causing rules to fire prematurely.

Solution: Understand the workflow involved and review the ordering of rule firing. Business rules fire on save and always as follows:

- Hard Errors in their listed order - then
- Soft Errors in their listed order - and finally
- Business logic rules in their listed order

If a hard error is preventing a trigger condition for a business logic rule, or business logic rules are ordered such that trigger conditions are not met, workflow may work, but only intermittently. If you have questions about the design of your workflow or need help, log an Extranet case.

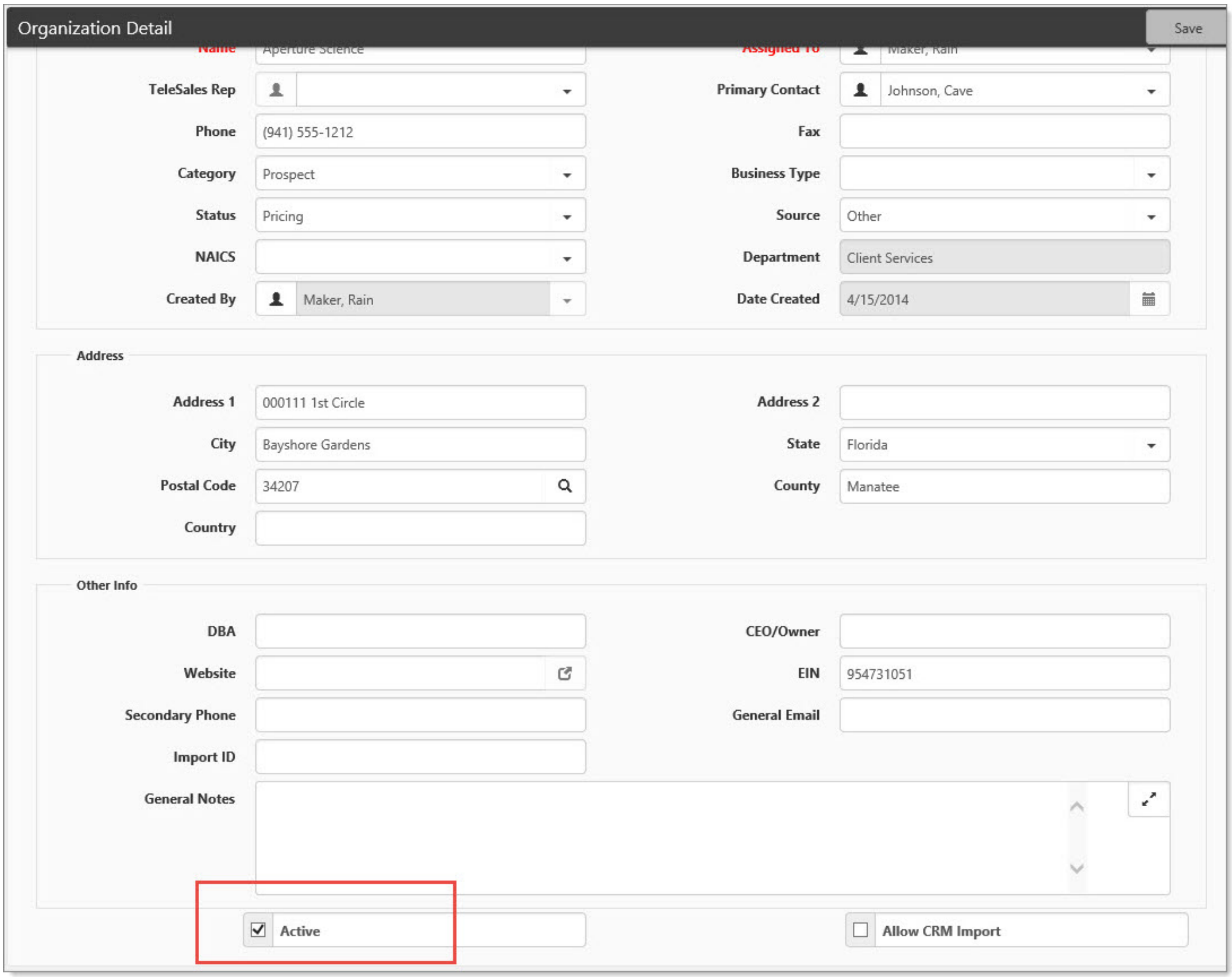
Workspace / Organization missing from search

Problem: You attempt to use a search dashboard such as the Client Service Case Search or Organization Search and the Org/Workspace you are searching for does not appear in the Client Filter parameter.

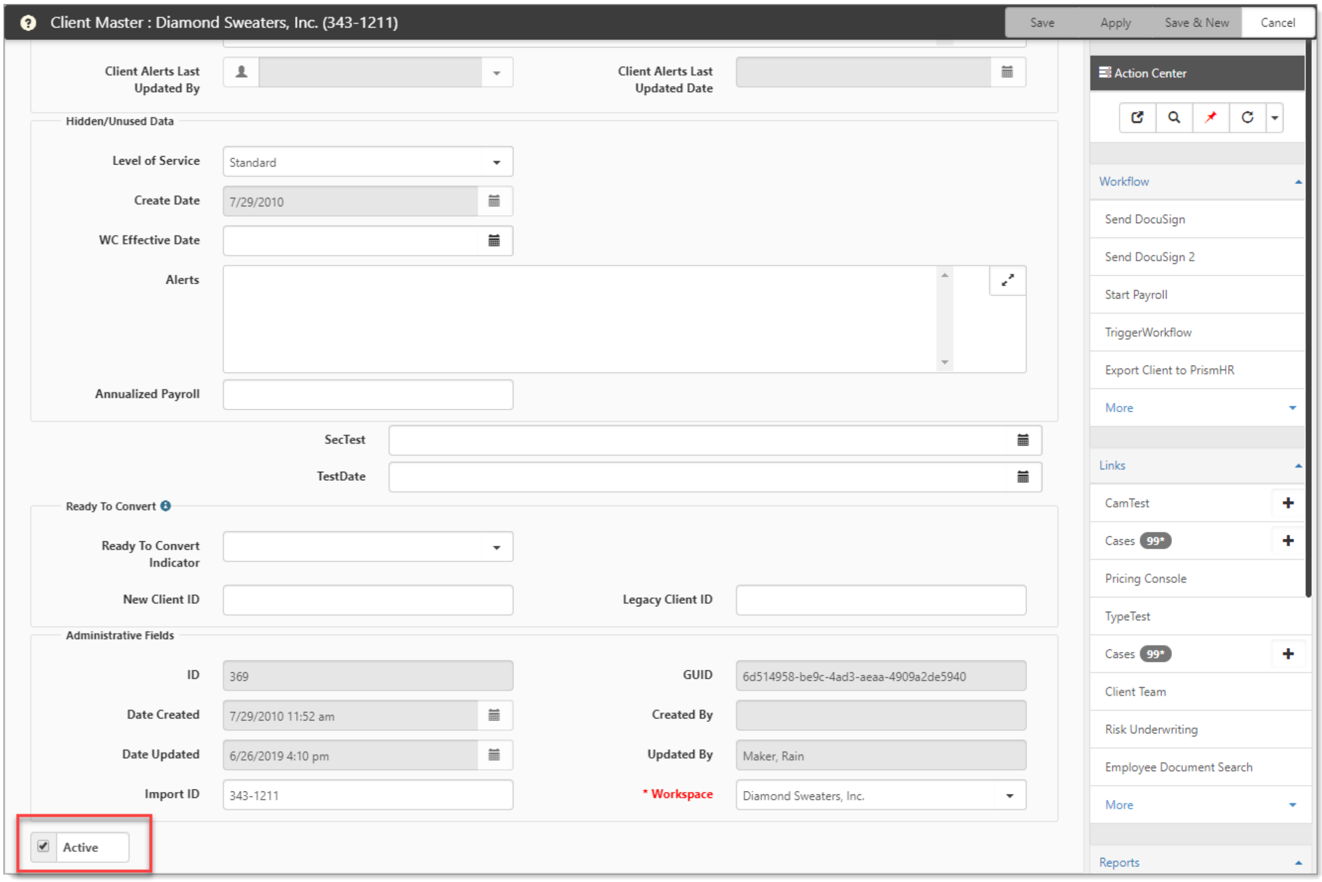
Cause: Org / Workspace has been marked as Inactive.

Solution:

- Select the **Active** option at the bottom of the Org detail page to activate the Org.



- Or, you can select **Active** in the Workspace settings.



Workspace search issue

Problem: When we enter a particular client name in the workspace name search field, that workspace does not show in the drop-down list to select. The search function seems to work correctly for all other workspaces, but not this particular one. The workspace in question is active.

Cause: Workspaces Associated Organization has been inactivated. The Workspace type ahead search functions will use the Organization data and will ignore inactivated Orgs.

Solution: Edit the Organization record and make sure the **Active** option located just below the Org header is select. If not, select it.

Organizations or Contact Tasks not automatically attaching to the Sales Workspace

Problem: Organizations or Contact tasks not automatically attaching to the Sales workspace even though the Default workspace is set under App Settings.

Cause: When you create a task or calendar event from an Org or Contact prior to Creating a workspace for that Org the tasks will generally get attached to the Sales Workspace designated in the App Settings page. However, the ClientSpace system allows for multiple workspaces to be designated as CRM related. When this happens, you are presented with a list of CRM related workspaces on Task Creation.

Solution: Either select the appropriate workspace from the DropDown list, or if there is a workspace improperly set as "CRM related" then correct this by performing the following steps.

1. Find the Name of the Workspace you need to adjust through the Select Workspace quick jump.
2. Open the Workspace Search dashboard and navigate to that workspace.
3. From the Workspace go to the Workspace Maintenance > Workspace Settings area at the top of the TOC.
4. Clear the **CRM Related** option and **save** the record.

Unable to use Time Tracking - Category field is blank

Problem: You attempt to use Time Tracking on a dataform in your environment, but the Category field on the Time Tracking record is blank. As this is a required field you are unable to save the record.

Cause: Time Tracker Categories have not yet been configured in your environment

Solution: Configure Time Tracking Categories

To configure Time Tracking categories in your environment:

1. First, check to be sure that all the appropriate Category Groups have been configured for your environment. Go to **System Admin** > **Lookups**.
   The Lookups list is displayed.
2. Filter for the Group Time Tracker Category.
3. Review this lookup and If required, add any additional time tracker groups you need.
4. Go to **System Admin** > **Advanced** > **Time Tracker Categories.**
5. To add a category, click **Add**.
   The Time Tracker Categories Details form opens.
6. Provide a **Category Name** and select an appropriate **Category Group**.
7. Click **Save** and continue until all Time Tracker Categories have been configured.
8. Verify your new categories by adding a time tracker record and reviewing the Time Tracker Categories list.

Parent-Child relationship between dataforms, but child form link does not appear

Problem: User has added a Parent-Child relationship between two dataforms by Adding a Parent Form field to the Child dataform. The new field appears to be configured properly, but the Related dataform drop-down still does not appear on the Parent Form.

Cause: Child form is not a member of the Template Workspace. Both the parent and child dataforms need to be members of the Template workspace for the relationship to work.

Solution:

1. Go to **System Admin** > **Workspace Templates**.
2. Select the Template in question.
3. When on the Template Workspace, in the **Action Center** menu, select **Dataforms**.
4. Ensure that both the Parent and Child dataforms are added to this workspace (it is not necessary for the child form to be on the TOC as it can be accessed through the Parent Form).

Outlook add-in and modules issues

Sometimes the most interesting ClientSpace issues aren't in ClientSpace.

"No HTTP resource was found that matches the request URI"

Problem: When trying to post to ClientSpace, receive an error "No HTTP resource was found that matches the request URI"

Solution: The workaround solution is to remove the "s" from HTTPS and then add it back.

> In your browser settings, ensure that your pop-up blocker is disabled.

To apply the workaround solution:

1. In **Settings**, in the **URL** field, remove the "s" from HTTPS.
2. Tab out of the field.
3. Click **Post to ClientSpace**.
   The error displays.
4. In the **URL** field, add the "s" back to HTTP.
5. Tab out of the field.
6. Click **Post to ClientSpace**.
   The problem should be resolved. If you need additional assistance, please log an Extranet case.

"Error: pwInternetExplorerRequiredException - Internet Explorer Required" Error when using Create Case or Task from Outlook Add-in

Problem: A user attempts to create a case or task from the Outlook add in and they receive the error "Error: pwInternetExplorerRequiredException - Internet Explorer Required". When checked they are on an appropriate version of Internet Explorer and the browser settings appear correct.

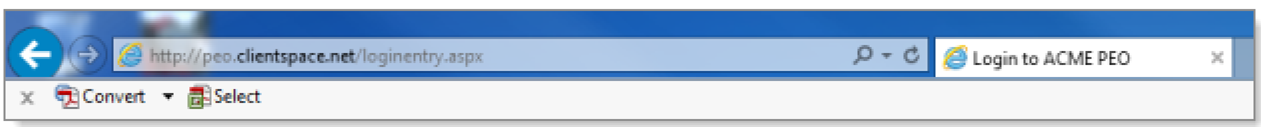
Cause: Microsoft will often push changes to Internet Explorer through Windows updates that can cause unexpected behavior in the browser.

Solution: Update to the latest version of the browser and check to ensure the update did not overwrite any of the browser configuration settings. This error is most commonly caused by the compatibility mode settings getting changed.

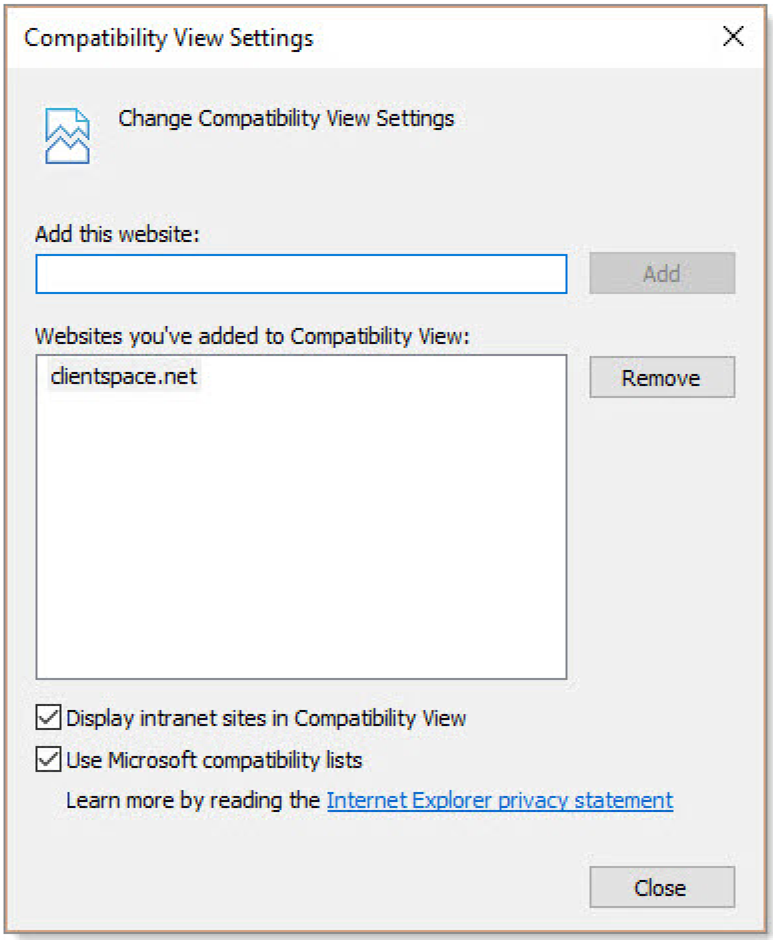
Additional considerations for Internet Explorer 10+: With Internet Explorer 10 and up, Microsoft made some major changes to the way the browser handles JavaScript and other web technologies, which can cause unexpected behavior in the application. To avoid these issues, you should set your browser to use compatibility mode for the ClientSpace application.

Set Compatibility mode through the following steps:

1. Open Internet Explorer and go to your ClientSpace login page – some users have reported that the login page does not load under I.E. 10, that is OK, we just need to get the URL from the browsers address bar.



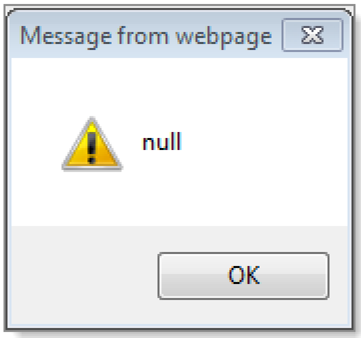
2. Select the domain portion of the URL. In the example this would be clientspace.net, your install may be different.
3. In Internet Explorer, go to the tools menu:
    - If you do not have an Option for Tools, right-click the top of your browser and ensure the Menu Bar is selected.
    - Then go to **Tools** > **Compatibility View Settings**.
    - Add the domain portion of the URL that you just selected into the **Add this website:** field (this defaults in some cases) and click **Add**. This will set the browser to use compatibility mode for any page where the URL ends in that domain (in our example, clientspace.net).



4. **Save** your settings, and you are done.

"null" Error when using ClientSpace Outlook add-in

Problem: You open Outlook and log into ClientSpace using the outlook add in, but when you attempt to Create a case or task you receive an error that simply says "null".



Cause: Older versions of the Outlook Add-In allowed you to store an invalid URL configuration which contained a trailing slash (https://your.clientspace.net/). This has been corrected with later versions of the application which strip the trailing slash from the URL on save.

Solution: Remove the trailing slash from the URL by logging out and logging back in to the ClientSpace Outlook Add-In.**

** A best practice would be to uninstall the Outlook Add-In and re-install it from the latest version that can be found in the Admin Workspace in ClientSpace. For Instructions to uninstall / re-install the add-in, see Email add-in for Outlook.

404 Error: File or Directory not found when attaching files from Outlook

Problem: You attempt to attach a file using the Outlook Add-In and you receive the error "Server Error: 404 - File or directory not found. The resource you are looking for might have been removed, had its name changed, or is temporarily unavailable.

Cause: You have exceeded the maximum file size for attaching through the Outlook Add-in.

Solution: The maximum file size for the Outlook Add-in is 5mb, however you can upload up to a 20mb file through the ClientSpace UI. Try zipping the file to make it smaller then uploading from Outlook, or open ClientSpace and manually attach the file in the UI.

This error also occurs if the File attachment size (20 mb) is exceeded anywhere within the application. Try zipping or reducing the file below the 20mb limit to resolve this issue.

Cannot attach from Outlook add-in

Problem: Unable to attach email or emails with attachments from Outlook Add-In. No error message is given, you connect to ClientSpace from the add-in and select a dataform/Workspace, but the attachment never happens.

Cause: Conflicting outlook plugin is causing part of the process (normally the pop-ups for selecting a contact / confirmation message).

Solution:

1. In Outlook, go to **File** > **Options** > **Add-ins** > **Manage COM Add-ins** and click **Go**.
2. In the dialog that opens clear all non-Microsoft Add-ins (other than the ClientSpace Add-in) that are enabled, making note of which add-ins you disable.
3. Save your changes and return to Outlook
4. Try attaching a document to ClientSpace.
5. Open ClientSpace and verify the attachment function worked correctly.
6. If you are now able to attach into ClientSpace, one of the other Outlook Add-ins is conflicting with the ClientSpace Add-in. Reverse the process of disabling add-ins one at a time, enabling an add-in, saving the setting, and attempting to attach to ClientSpace.
7. When you find a conflicting add-in make which stops the attachment process, make note of this, disable it again and continue re-enabling the other add-ins and testing, as there may be several that have conflicts.
8. When you have a list of conflicting add-ins, contact your local IT department, and discuss the issue. They may be able to help by either removing the conflicting add-ins or configuring them in such a way that they no longer conflict with the ClientSpace Outlook Add-in.

Contact is defaulted on attaching from Outlook

Problem: When a client is trying to attach an email from the Outlook add-in, Outlook does not prompt to select the associated contact. Instead, the Contact is defaulted to an apparently random contact in the system.

Cause: One of the email addresses on the email is incorrectly associated with a contact record in ClientSpace. This was most likely caused by a user input mistake.

Solution: Update incorrect email address on contact.

1. Find the contact that is being selected in the system using the Contacts Module.
2. Replace the incorrect email address on the contact with the appropriate email address for the contact.
3. The Outlook add-in should now correctly search for related contacts when attaching an email to ClientSpace, providing a list of contacts, or prompting the user to select a contact.

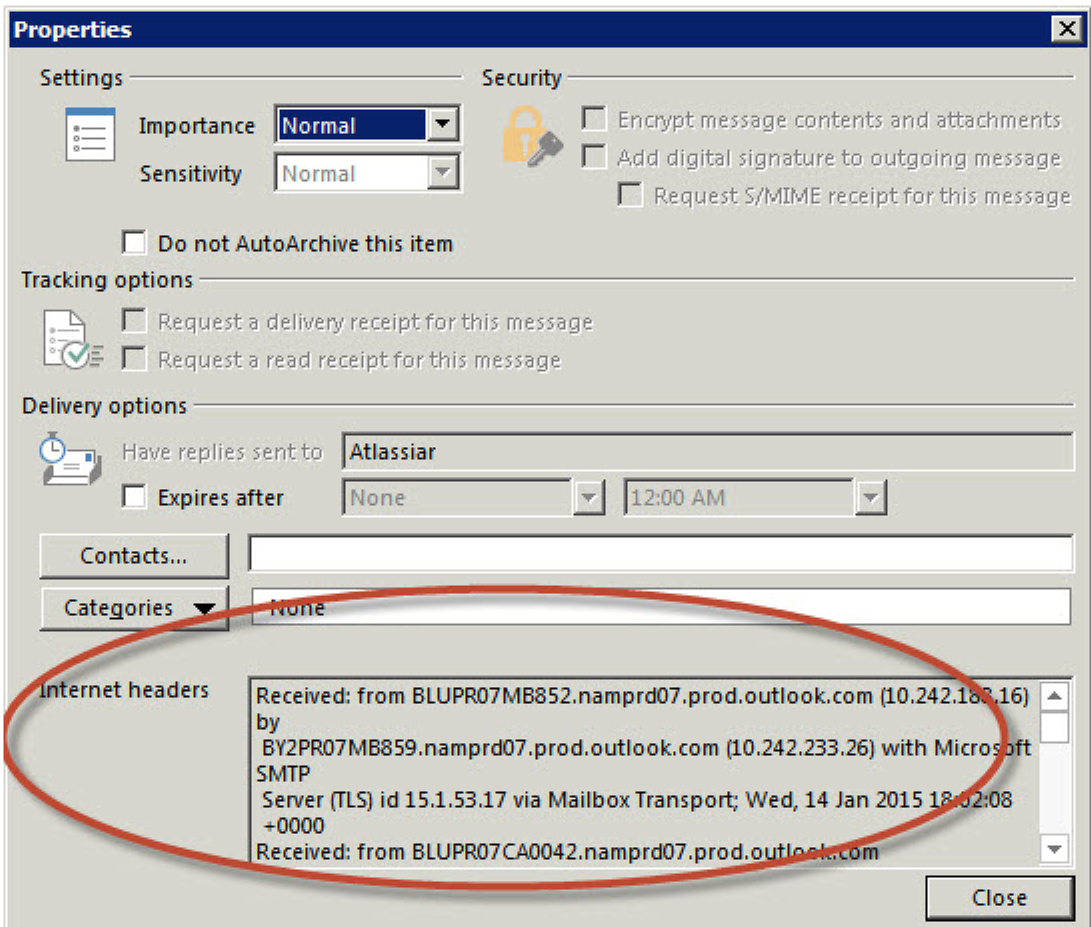
Edit Case or Task missing from Outlook button bar

Problem: For some ClientSpace emails the Edit Case or Edit Task button appears to be missing when using the Outlook Add-In.

Cause: Email Header information has been stripped off - likely by the Clients Network security. The Outlook add-in reads the emails header information to determine if the email has links to an editable element in ClientSpace such as a task or case.

Solution: Check the header information for the email in question:

1. In Outlook, open the email in a separate window by double clicking the email in the Inbox list.
2. Go to **File** > **Info** > **Properties** and look at the Internet Headers section.



This section should contain information about the ClientSpace element that produced the email. It is possible that a firewall or some other Network Security device has removed this header information. If this area has been stripped of information, contact your local IT department to see if it is possible to remove these restrictions.

Edit linked document functionality missing from Outlook add-in

Problem: Previously, when opening an email in Outlook, there was an option to edit the case. That option seems to be missing on some emails.

Cause: Firewall / Antivirus settings are stripping email header information. The URL link used by the edit functionality is stored in the header information of the email itself. Certain Firewall and / or antivirus/malware systems can strip this information from the email, removing the remote edit functionality in the Outlook Add-in. Check this by opening the email in a separate window (pop-out in MS Outlook), then go to File Properties to see the Internet headers information. If this is missing or has replaced by a message such as "Removed by Symantec Firewall", the ClientSpace domain needs to be authorized.

Solution: Contact your Network security administrator about the problem. They may be able to add the pertinent ClientSpace domain to your Network security unrestricted list, thereby allowing the header information from ClientSpace to remain on the emails.

Error: 'The MS Interop assemblies are not installed, unable to continue installation.'

Problem: You are attempting to install the Outlook Add-in for ClientSpace when the installer fails with the error 'The MS Interop assemblies are not installed, unable to continue installation.'

Cause: Insufficient rights on the installing account. The Installer needs complete access to the Windows system registry, attempting to install with a non-administrator account on the machine can cause the install to fail.

Solution: Re-install the Outlook add-in using an account with Administrator access on the machine.

1. Check the version of Outlook on the machine where you would like to install the Add-in.
2. Download the appropriate version of the installer to the local machine.
3. Run the **setup.exe** file by right clicking the file and choosing **Run as Administrator**.
4. Follow the installer step-by-step to complete the installation.

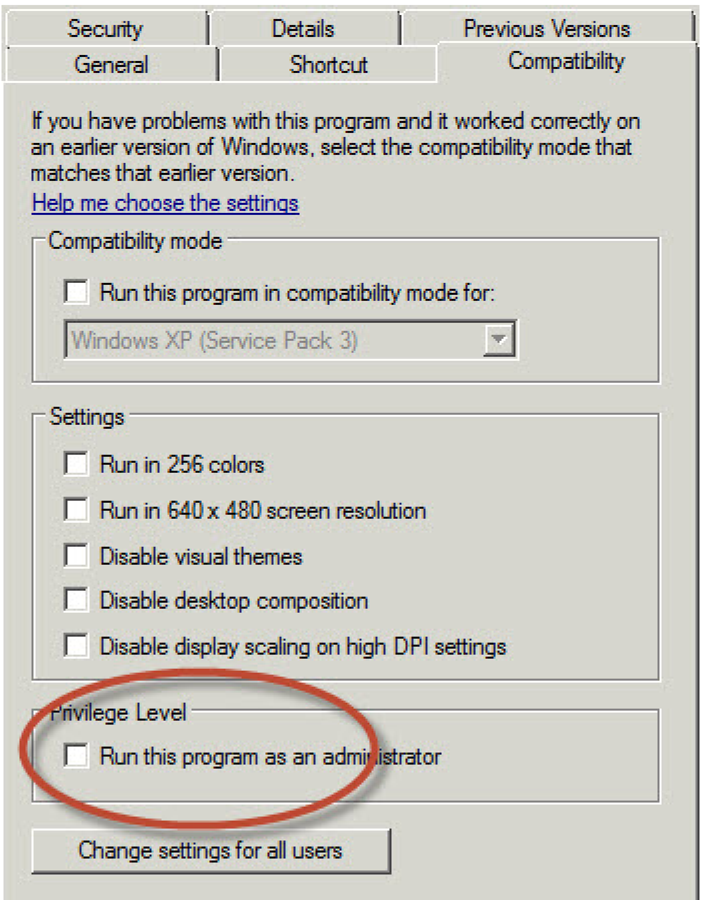
Outlook add-in disables each time Outlook restarts

Problem: Each time the user opens Outlook, the ClientSpace Outlook Add-In is disabled.

Cause: Insufficient rights when running Outlook client

Solution: Run Outlook as administrator

1. Find the icon used to start Outlook, either on the desktop, Windows Taskbar, or the program menu.
2. Right-click the icon and go to **Properties** > **Compatibility** > and select **Run this program as Administrator**.



3. **Save** the changes.

Outlook add-in disables on Outlook close

Problem: When you open Outlook the ClientSpace add-in is disabled. You can re-enable the add-in using the steps Outlined here but when you close Outlook, the add-in is disabled again.

Cause: Outlook must be run with administrative privileges.

Solution:

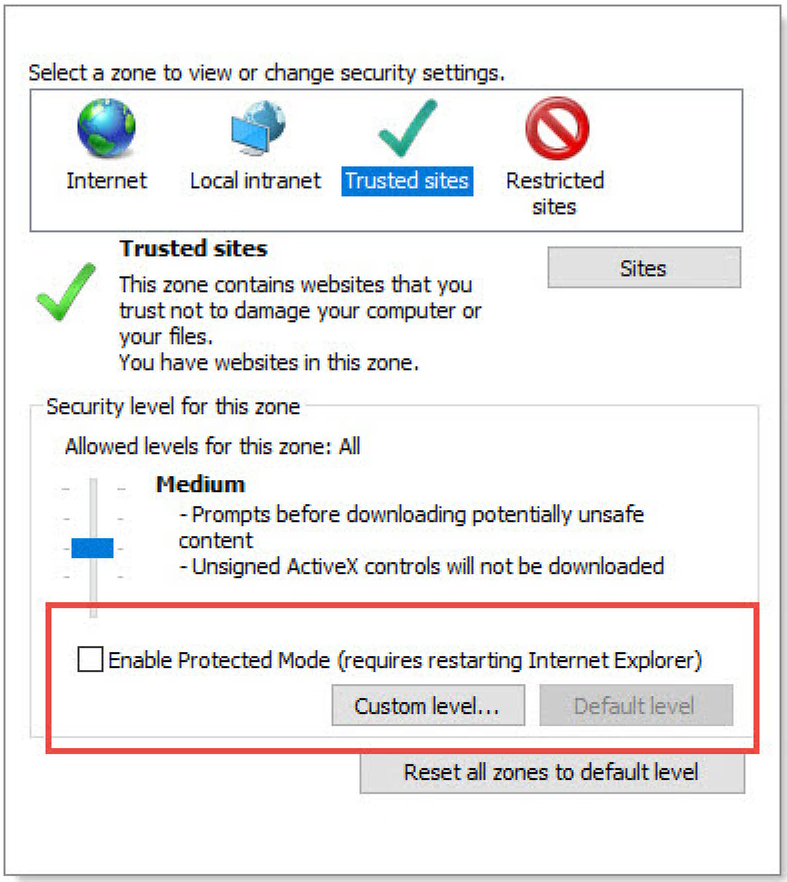
1. Close any instances of Outlook
2. Find the shortcut icon used to open Outlook.
3. Right-click the icon and choose **Properties** > **Shortcut** > **Advanced** and select **Run as Administrator**.
4. **Save** your changes.
5. Re-open Outlook.
6. If the Add-in is not enabled, enable it.

Outlook add-in error: "fnShow: Access Denied"

Problem: You attempt to use the Outlook Add-In to connect to ClientSpace and perform an action, such as creating a case. The Client Service Case detail form is presented, but when you try to select a Category (or any other lookup) you received the error: "fnShow: Access Denied" and cannot proceed further.

Cause: Internet Explorer setting is causing windows to default to the 64-bit version of IE when open the browser from the add-in.

Solution: Update Internet Explorer settings to disable "Protected Mode"



1. Close Outlook on the affected machine.
2. Go to Internet Options, either through the control panel or by accessing in IE through **Tools** > **Internet Options**.
3. Go to the Security tab
4. Clear **Enable Protected Mode** and click **OK** to save you settings. This will require a re-start of Internet Explorer.
5. Close all instances of Internet Explorer.

6. Open Outlook and log in to the ClientSpace Outlook Add-In.

Your local IT administrator may have locked these settings down on your machine for security purposes. If you are unable to change these settings, your IT admin will need to perform these actions as an administrator of the machine. More information on this issue may be found in the following Microsoft Article: https://support.microsoft.com/en-us/help/2864914/enhanced-protected-mode-add-on-compatibility

Outlook add-in error: "Object doesn't support this property or method"

Problem: While attempting to use the Outlook add-in you click the action button (Create Task, create case etc...) and you receive the error "Object doesn't support this property or method" you are prompted for whether to continue to run scripts on the page. Regardless of what answer you provide, canceling the error shows a blank gray screen and the word "Loading..."

Cause: The ClientSpace site is no longer in the list of sites for which pop-ups are allowed - this commonly happens after a Windows Update.

Solution: Add the ClientSpace site domain to the list of allowed sites for pop-ups.

In Internet Explorer:

1. Go to **Tools** > **Pop-Up Blocker** > **Pop-up Blocker Settings**.
2. Add the appropriate domain of the URL (for example, clientspace.net) to the list of allowed sites. You can find this domain at the end of the ClientSpace URL.
3. Save your settings.
4. Close and open Outlook.

Outlook add-in error: "Your cached credentials are bad."

Problem: Unable to login to ClientSpace using the Outlook Add-In. When the user attempts to login they receive the error "Your cached credentials are bad". Uninstalling and re-installing, then re-entering the user's credentials does not resolve the issue.

Cause: Login credentials that are cached on the machine do not match the current username/password in ClientSpace. This should be removed and reset with an Uninstall/Reinstall, but in some cases it does not.

Solution:

1. Try having a different ClientSpace user log in to the Outlook add-in on the affected machine using their credentials.
2. Then log out and log back in as the affected user.
3. This will sometimes force the cached credentials to be reset. If this does not resolve the issue, log an Extranet case for support.

Outlook add-in keeps inactivating

Problem: Outlook software disables the ClientSpace add-in whenever Outlook is closed and reopened.

Cause: Installation defaults to "everyone" during the install process, but there is a security setting on the machine policy that prevents the logged in user from accessing non-profile specific data.

Solution:

1. Uninstall and re-install the Outlook add-in.
2. Select the option for **Just Me**, which should install the app with the proper rights.

Outlook add-in will not enable

Problem: Outlook add-in appears to be installed properly, but the Kandu Icon does not appear in the Ribbon bar and no functionality is available.

Cause: Add-in is disabled

Solution: Re-Install the appropriate Outlook Add-in module

1. Uninstall the Outlook Add-in through the Add/Remove programs control panel in Windows.
2. Re-install the appropriate Add-in for the Outlook version - x86 (32 bit) or x64 (64 bit).
3. Open Outlook.
4. Go to **File** > **Add Ins**.
5. At the bottom of the screen select **Disabled -Items**.
6. When the Disabled window opens, select **ClientSpace Add-in** and click **Enable**.
7. ClientSpace Add-in will disappear from the Disabled window.
8. Choose **Com Add-Ins** from the bottom left and click **Go**.
9. Select the **Enable** box and **Save**.
10. Log the user into ClientSpace.

PDF active report displays "Garbage" characters instead of report data

Problem: You run an Active Report which outputs to PDF, but when the report opens you find a page full of unreadable "garbage" characters instead of the report data.

Issue 1

Cause: An unreadable or missing font has been used in the report that Adobe Acrobat is unable to process. Acrobat provides you the ability to add fonts to the application from your local desktop. If these fonts aren't included in the report set, when the report tries to open the application cannot display the information and the data becomes garbled.

Solution: Create a support ticket with PrismHR. We may need to edit the Active report to use a more generic font and re-save the report.

Issue 2

Cause: The Active Reports PDF print functionality does not react well when the ClientSpace web environment is extremely active while running large PDF reports. A bad interaction between the Active Reports PDF distiller application and the ClientSpace Web Application pool can cause the PDF Distiller to generate these types of "Garbage" reports

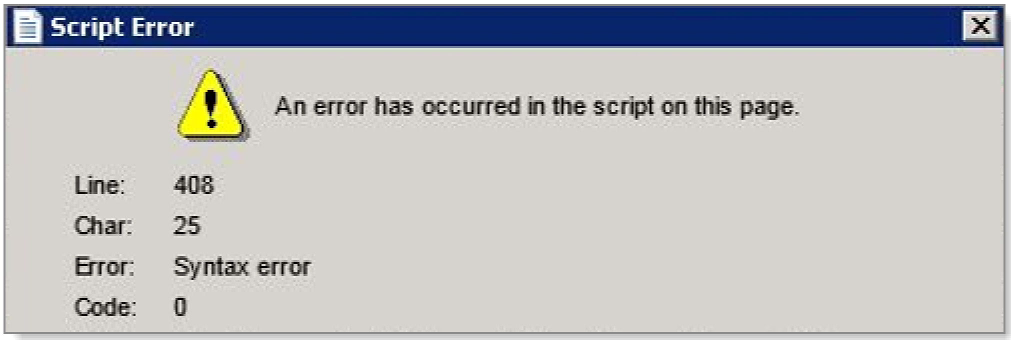
Solution: Create a support ticket with PrismHR. Recycling the Application pool on your site manually will often resolve these intermittent issues.

Persistent PDF Issues

On very rare occasions the number of users / report interactions on an install can cause the bad interaction between the PDF Distiller application and the ClientSpace Web application pool to occur frequently. In these instances, it may be necessary to schedule a more frequent recycle of the ClientSpace application pool for your site. Create a support ticket with PrismHR. For assistance in determining if this additional step is necessary, log an Extranet case.

Script error when attaching email from Outlook

Problem: User receives a script error when typing in the Workspace field when trying to Attach Email from the Outlook Add-in.



Cause: There is a slash after the URL stored on the ClientSpace login page.

Solution: Log out of the Outlook Add-in. When logging back in, remove the slash from the end of the URL.***

**Current versions of the Outlook add-in resolve this issue by stripping the trailing slash from the URL when saving the login information. A best practice would be to uninstall and re-install from the latest version on the Admin Workspace.

Error messages: ClientSpace and PrismHRAPI

When ClientSpace cannot communicate with the PrismHR API, an error message is displayed: "Unfortunately, the service is currently unavailable. Please try again later. [Message ID: {Error Code}]"

Use the following table for the Error Code and its meaning.

Error Code	Meaning	Message
Error [10002]	(no "peo_id" or auth "key" in querystring)	"Unable to validate User in ClientSpace, insufficient credentials provided. Please contact your ClientSpace Administrator."
Error [10003]	(no AppCode matching PEOID)	"Unable to validate User in ClientSpace for PeoID '{0}'. Please contact your ClientSpace Administrator."

Error Code	Meaning	Message
Error [10004]	(could not retrieve APIConfig by AppCode)	"Unable to connect to obtain an API Configuration for validation. Please contact your ClientSpace Administrator."
Error [10005]	(could not obtain a LoginClient via APIConfig endpoint)	"Unable to connect to obtain a PrismHR Login Client for validation. Please contact your ClientSpace Administrator."
Error [10006]	(could not obtain a LoginResponse object)	"Unable to connect to PrismHR for validation. Please contact your ClientSpace Administrator."
Error [10007]	(obtained a LoginResponse but the errorCode != 0, bad login to PrismHR)	"Unable to log in to PrismHR, Error = '{0}'. Please contact your ClientSpace Administrator and report this error."
Error [10008]	(successful LoginResponse from PrismHR but did not contain a PrismHRSessionID)	"Unable to obtain a valid Session from PrismHR. Please contact your ClientSpace Administrator."
Error [10009]	(no SignOnResponse when validating Token)	"Unable to validate this User's Authentication Key, no response from PrismHR. Please contact the System Administrator of the system from which you are trying to log in."
Error [10010]	(obtained a SignOnResponse but the errorCode != 0, invalid Token)	"Unable to validate User in PrismHR, Error = '{0}'. Please contact your ClientSpace Administrator and report this error."
Error [10011]	(not a valid TPA user)	"This User or your Server is not configured for Single Sign On in ClientSpace. Please contact your ClientSpace Administrator."
Error [10012]	(Exception, loglevel2, bad endpoint)	"Unable to validate User in ClientSpace, a severe error occurred during processing. Please contact your ClientSpace Administrator and report error '{0}'"

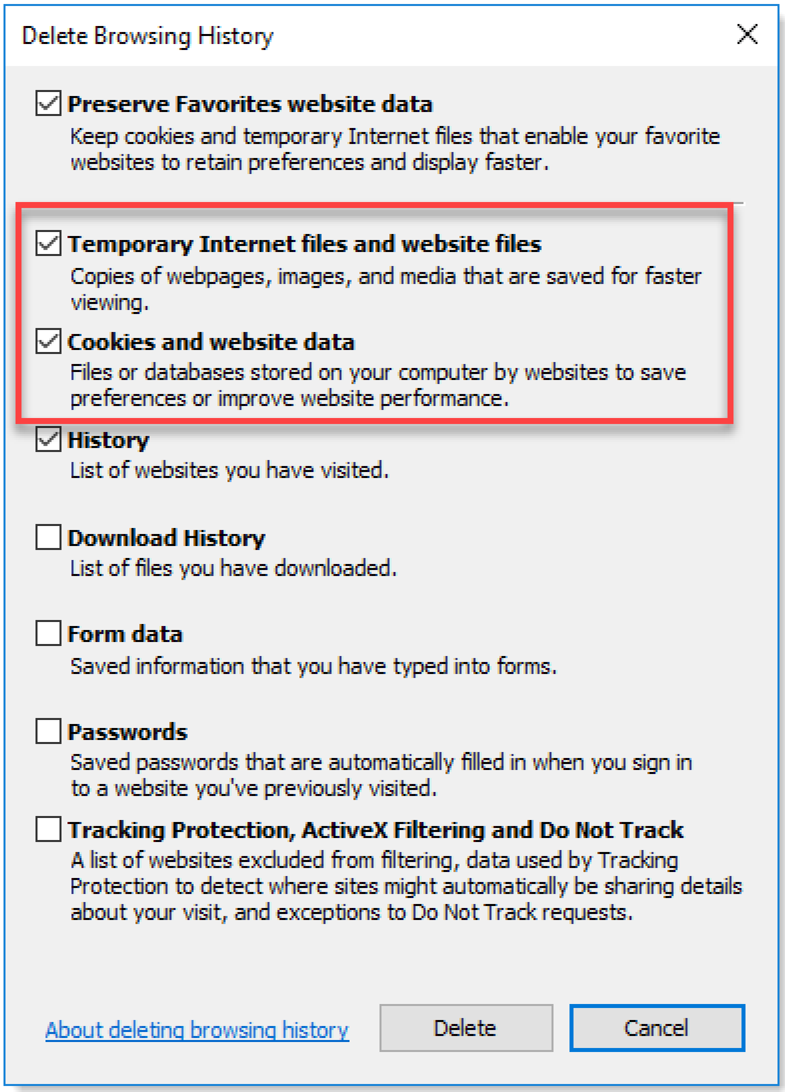
Error Code	Meaning	Message
Error [10013]	(Exception, loglevel1, bad endpoint)	"Unable to validate User in ClientSpace, a severe error occurred during processing. Please contact your ClientSpace Administrator and report error '{0}'"
Error [10014]	(Exception, but no APIConfig available)	"Unable to validate User in ClientSpace, a severe error occurred during processing (no API Configuration form). Please contact your ClientSpace Administrator."
Error [10015]	(ProcessTrustedLogin failed)	"Unable to log in to ClientSpace. Please contact your ClientSpace Administrator."

Clearing the browser cache in Internet Explorer

Internet Explorer often saves or caches copies of frequently visited pages. This is one way the browser can speed up your Internet experience. However, this caching can cause issues if it saves a bad version of a page. Learning to clear the browser cache helps remove these pages and forces your browser to get the latest version of a page, which can clear up some basic Internet issues.

To clear the browser cache in Internet Explorer:

1. Open Internet Explorer.
2. Go to **Tools** > **Internet Options**.
   The Internet Options dialog box opens.
3. In the **General** tab, in **Browsing history**, select **Delete**.
   The Delete Browsing History dialog box opens.
4. Select (at a minimum) the **Temporary Internet files and website files** and **Cookies and website data**.



5. Click **Delete**.
   You are returned to the main Internet Options dialog box.
6. Click **OK**.