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Rochester: Using Notification Templates with Communication Manager

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About the City of Rochester, Minnesota

Who we are:

- Rochester is the 3rd largest city in Minnesota.
  - Population: 112,225
  - Metro Area Population: 213,873
  - Geography: 54.75 sq. miles
  - Located 85 miles SE of Minneapolis/St Paul
  - Consistently Ranked as 1st in Best Places to Live in United States
  - Home of the Mayo Clinic and IBM
  - Rochester draws over 2 million visitors a year
  - Mayo Clinic picked Rochester to become a Global Destination Medical Center for its health care advancements.

Where we are at with Accela

- Live on Accela Core since 2007 (self hosted)
  - Current Version 7.3.3.4
    - Will be upgrading to Version 8.0.2 late fall 2016

  - Currently Using
    - Land Management
    - Licensing for Rental Properties
    - Fire
    - Planning
    - AMO and Inspector App
    - ACA
    - GIS (XAPO)

  - Master Scripts
    - Version 2.0

What We Were Trying to Solve…

- Difficulties with scripted emails
  - Scripted emails were composed by IT staff
    - Required multiple revisions and testing
    - Format was hard to be consistent
    - Required staff testing approval

  - Communication was not stored or tracked on the record
    - Sent communications to our city Gmail account to track
    - Multiple steps to look at and track these emails

How We Solved These Issues

- After 7.3 Upgrade
    - Configured Communication Manager
        - Communication Tab on the record to track communications when using a Notification Template
        - Communication Manager Portlet allows for tracking all outgoing emails
        - New Notification Templates and ability to create our own custom Notification Templates

    - Learned how to create custom functions to get the parameters we wanted
        - Jason helped us learned how to find variables to use for parameters for Notification Templates
        - Additional functions are available on the Accela Community

Previous Procedure for Scripted Emails

Scripting Emails

Pain points for scripting emails

- When scripting emails
  - Multiple standard choice lines
    - Declare variables
    - Branching
    - Unclear formatting (multiple testing)
    - Contact Looping

```
InspectionResultSubmitAfter City
appMatch("Building/City of Rochester/*/*") && inspType ==
"Meter Release" && inspResult == "APPROVED" ^
branch("ROCH_EMAIL_METER_RELEASE_NOTICE_IRSA")

ROCH_EMAIL_METER_SET_NOTICE_IRSA
true ^ var subject="Meter Set Notice"
true ^ var t1 ="We have completed a Meter Set inspection at "
+ getPrimaryAddress() + ". Please review the guidesheet
attached to permit # " + capId.getCustomID() + " for specific
details.   Inspection result comment: " + inspComment
true ^
aa.sendMail("accela_mailstaging@rochestermn.gov","aheydon
@rochestermn.gov;rochesterbuildingsafety@gmail.com","
",subject, t1)
```

Scripting Branch Example

Standard Choices Item – Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: ROCH_EMAIL_METER_SET_NOTICE_IRSA

Description:
(250 char max)
Meter Set Notice Email to RPU on
InspectionResultSubmitAfter

Status: ◉ Enable ○ Disable

Type: ○ System Switch ○ Shared drop-down ◉ EMSE ○ Business Configuration

Standard Choices Value	Value Desc	Active	
01	true ^ showDebug = false; showMessage = false	☑	Delete
02	true ^ var subject="Meter Set Notice"	☑	Delete
03	true ^ var t1 ="We have completed a Meter Set inspection at " + getPrimaryAddress() + ". Please review t	☑	Delete
04	true ^ aa.sendMail("accela_mailstaging@rochestermn.gov","aheydon@rochestermn.gov;rochesterbuildin	☑	Delete

Update **Add** **Cancel**
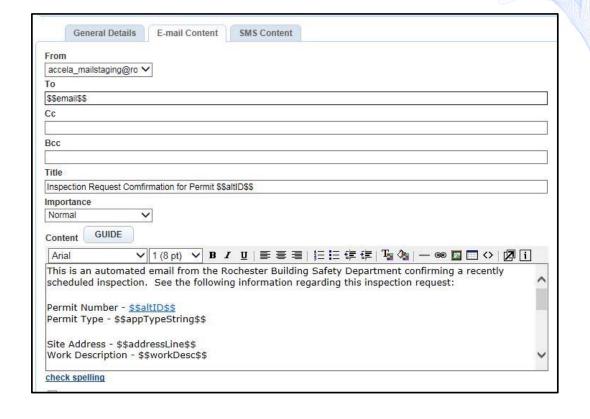
New Procedure for Email Communications

Step 1: Create the Notification Template
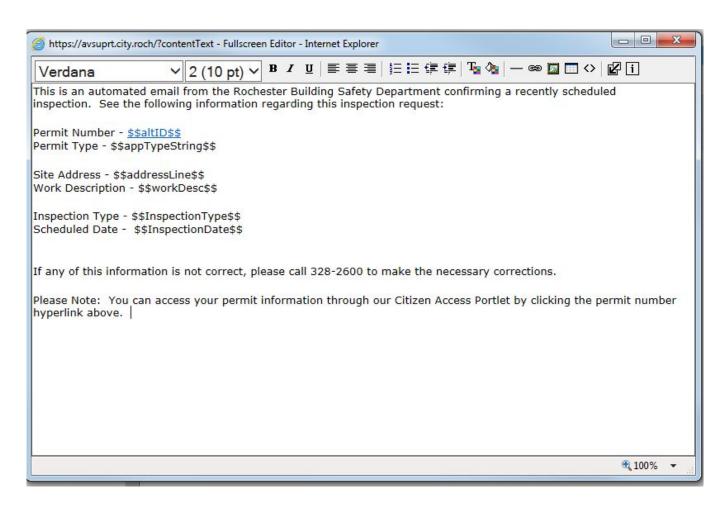
Create a New Notification Template

- To create the function, you will need to know what is required in your Notification Template.
  - What information is needed for parameters?
  - Format Text – HMTL editor
  - Who is the recipient?
  - Will need Notification Template Name for function

Notification Template Editor Example

Step 1.5 Email Parameter Functions

Very Important Step if you don't already have these functions!

- Go to Community and download these email parameter functions
  - https://accela.force.com/success/kA5600000004FOT?srPos=2&srKp=ka5&lang=en_US

The attached Zip file contains the following Notification Template Functions which should be added to INCLUDES_CUSTOM

- generateReport
- getRecordParams4Notification
- getACARecordParam4Notification
- getACADeepLinkParam4Notification
- getACADocDownloadParam4Notification
- getContactParams4Notification
- getPrimaryAddressLineParam4Notification
- getPrimaryOwnerParams4Notification
- getACADocumentDownloadUrl
- getACARecordURL
- getDeepLinkUrl
- sendNotification

Version Number	All Versions
Products	Accela Automation
File	Notification Template Functions.zip
Product/Feature	Accela Automation (AA)

Example of Creating a Parameter Function

Find your variable then create your email parameter function

```
/*-------------------------------------------------------------------/
| BEGIN Event Specific Variables
/-------------------------------------------------------------------*/
var InspectionDate = aa.env.getValue("InspectionDate");     logDebug("InspectionDate = " + InspectionDate  );
var InspectionMode = aa.env.getValue("InspectionMode");     logDebug("InspectionMode = " + InspectionMode  );
var InspectionTime = aa.env.getValue("InspectionTime");     logDebug("InspectionTime = " + InspectionTime  );
var InspectionType = aa.env.getValue("InspectionType");     logDebug("InspectionType = " + InspectionType );
var InspectionTypeList = aa.env.getValue("InspectionTypeList"); logDebug("InspectionTypeList = " + InspectionTypeList  );
var InspectionIdList = aa.env.getValue("InspectionIdList"); logDebug("InspectionIdList = " + InspectionIdList  );
var InspectorFirstName = aa.env.getValue("InspectorFirstName"); logDebug("InspectorFirstName = " + InspectorFirstName  );
var InspectorLastName = aa.env.getValue("InspectorLastName");  logDebug("InspectorLastName = " + InspectorLastName  );
var InspectorMiddleName = aa.env.getValue("InspectorMiddleName");logDebug("InspectorMiddleName = " + InspectorMiddleName  );
var NumberOfInspections = aa.env.getValue("NumberOfInspections");logDebug("NumberOfInspections = " +  NumberOfInspections );
var s_id1 = aa.env.getValue("PermitID1Array");
var s_id2 = aa.env.getValue("PermitID2Array");
var s_id3 = aa.env.getValue("PermitID3Array");
var inspTypeArr = String(InspectionTypeList).split("|");        // Submitted Inspection Type Array
var inspIdArr = String(InspectionIdList).split("|");           // Inspection identifier Array
```

```
function getInspectionScheduleParams4Notification(params) {

    // pass in a hashtable and it will add the additional parameters to the table
    // This should be called from InspectionScheduleAfter Event

    if (inspId) addParameter(params, "$$inspId$$", inspId);

    if (InspectorFirstName) addParameter(params, "$$InspectorFirstName$$", InspectorFirstName);

    if (InspectorMiddleName) addParameter(params, "$$InspectorMiddleName$$", InspectorMiddleName);

    if (InspectorLastName) addParameter(params, "$$InspectorLastName$$", InspectorLastName);

    if (inspGroup) addParameter(params, "$$inspGroup$$", inspGroup);

    if (InspectionTypeList) addParameter(params, "$$InspectionType$$", InspectionTypeList);

    if (inspSchedDate != null) addParameter(params, "$$InspectionDate$$", inspSchedDate);

    if (InspectionTime) addParameter(params, "$$InspectionTime$$", InspectionTime);

        return params;

}
```

Step 2: Creating the Custom Function – sendNotification function

Function Fun

- Send Email Function
  - Name function
  - Declare variables – ex. ACA url, contact types, report name, notification template name, hashtable for parameters, contact array
  - sendNotification function to complete the email

```
function sendMeterSetNotification(){
var notificationTemplate = "ROCH_METER_SET_NOTICE";
var report = null;
var acaURL = "aca.rochestermn.gov/citizenaccessstaging/";
var params = aa.util.newHashtable();
getRecordParams4Notification(params);
getACARecordParam4Notification(params,acaURL);
getInspectionResultParams4Notification(params);
getPrimaryAddressLineParam4Notification(params);
sendNotification("accela_mailstaging@rochestermn.gov",
"aheydon@rochestermn.gov","",notificationTemplate ,params,(report));
}
```

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Custom Function Example

Custom Script - Custom Script Detail

Master Script Name: INCLUDES_CUSTOM

Master Script Text:

```
getPrimaryAddressLineParam4Notification(params);
sendNotification("accela_mailstaging@rochestermn.gov","aheydon@rochestermn.gov",
}


function sendMeterSetNotification(){
var notificationTemplate = "ROCH_METER_SET_NOTICE";
var report = null;
var acaURL = "aca.rochestermn.gov/citizenaccessstaging/";
var params = aa.util.newHashtable();
getRecordParams4Notification(params);
getACARecordParam4Notification(params,acaURL);
getInspectionResultParams4Notification(params);
getPrimaryAddressLineParam4Notification(params);
sendNotification("accela_mailstaging@rochestermn.gov","aheydon@rochestermn.gov",
}

function sendBLDGInspectionPendingNotification(){
var notificationTemplate = "ROCH_BLDG_PENDING_INSPECTION";
var report = null;
var acaURL = "aca.rochestermn.gov/citizenaccessstaging/";
var contactTypesArray = new Array("Applicant", "Job Superintendent");
var params = aa.util.newHashtable();
```

Last Modified Date: 6/2/2016 by JTABOR

Save

Step 3: Enter Standard Choice Line

Put it to work

- Create line with desired parameters to fire function
  - Test your beautiful email and function!

appMatch("Building/City of Rochester/*/*") && scriptName == null && inspType == "Permanent Service" && inspResult == "APPROVED" || scriptName == null && inspType == "Permanent Service" && inspResult == "APPROVED w/CONDITION" || scriptName == null && inspType == "Permanent Service" && inspResult == "FINAL APPROVAL" ^ sendMeterSetNotification();

Our Key Takeaways:
What Was Accomplished?

Why We Love This New Way

Two Major Wins

- IT is no longer in charge of formatting
  - Made our agency staff in control of email text and formatting
  - Changes are not made through IT *Why we are happy!

- All emails are tracked through Communication Manager
  - Emails appear under Communication Tab on Record Portlet
  - Emails also appear in the Communication Manager Portlet
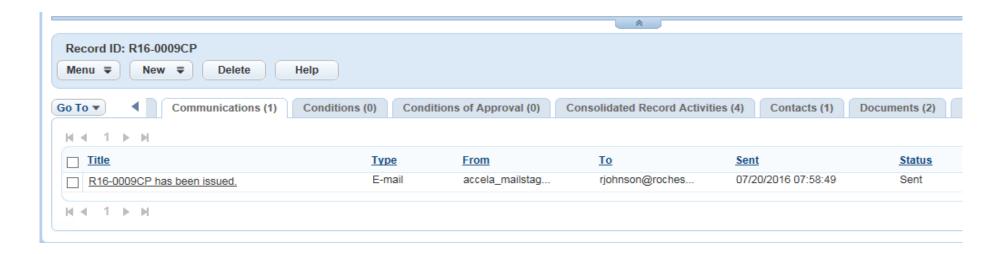 - No longer have to look at Gmail *Yay!!

Emails Tracked in Communication Tab

FID 8494 –Record Communication List

> Will turn on Communication Tab in the record.
> - Track emails
> - Resend emails
> - Text (if SMS is set up)

Current Emails and Functions

- Converted and New Emails

  - Inspection Schedule Confirmations
  - Inspection Result Emails
    - Backflow Prevention
    - Meter Set Notices
  - Permit Issuance Emails
  - Payment Notifications to Staff
  - Workflow Update Emails

  25 total email functions currently in use

Demonstration:
InspectionScheduleAfter Email
InspectionResultSubmitAfter Email

Questions?

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