**SWADDLE**

**Set up**

* Prerequisites
  + Since SWADDLE is utilizing event scripts on the highest level (\*/\*/\*/\*), the agency needs to be on the productized master scripts, at least version 8.0.
  + If the agency is not on that version, then the event scripts need to be put into the highest level event script for each module that is utilizing
  + A new module should be created to keep the record separate from other record types and help simplify security on the record. It is suggested that the module be name “SEPRULES”
  + One user group with full access should be created. Access should be given to a limited number of users.
* Record
  + The record configuration is in <https://sepaa.septechconsulting.com:5001> (Partner/lwacht/accela)
  + The alias is Automation Configuration
  + The record type is: ServiceRequest/Automation/NA/NA
  + The only critical components of the record are the custom fields and custom lists. There are sample rows set up that should be imported as well.
  + Use Data Manager to import the record into the desired agency.
    - Make sure to change the module to the desired module.
* Scripts
  + The custom functions are in INCLUDES\_SEP\_FUNCTION.
    - To include the functions in a new agency, add the INCLUDES\_SEP\_FUNCTION file to their repository in a miscellaneous directory.
    - If they are not using a repository, copy all the functions into a new script file called “INCLUDES\_SEP\_CUSTOM”.
    - Add this line to their INCLUDES\_CUSTOM\_GLOBALS file: eval(getScriptText("INCLUDES\_SEP\_CUSTOM"));
  + The following event files will need to be added to their repository or copied into their environment—do not overlay anything that may currently be there. If there is other code, it should be reviewed to determine where the Swaddle code should go. If there is not a preference, add it to the top of the file
    - ASA:\*/\*/\*/\*
    - ASB:\*/\*/\*/\*
    - WTUB:\*/\*/\*/\*
    - WTUA\*/\*/\*/\*
  + There is currently one pageflow script. It is only needed if document verification is required for ACA. It should either be copied into the client environment or entered using their repository.
    - ACA\_BEFORE\_REQD\_DOCS.js
  + There is currently one batch script. It is only needed if permits/licenses are being automatically renewed. It should either be copied into the client environment or entered using their repository.
    - BATCH\_EXPIRATION\_SWADDLE.js
* Agency record
  + If the agency is doing a data conversion, then this record needs to be backed up so it can be restored when the data is deleted before conversion runs.
  + Whenever the record is updated, use the CSV export function to create an Excel spreadsheet of the current custom lists. This will be imported into ???
  + ???
  + The pre-go-live checklist needs to have an item for moving this record into the production environment.
  + Once in their production environment, this should not be an issue.

**Training**

* The goal of this solution is to allow an agency to not have a dedicated technical resource to maintain their scripting. For the majority of the solution, this is the case. However, in order to utilize the Additional Query text box that is available in most of the tables, the following knowledge would be helpful for the business analyst to have .
  + Referencing Custom Fields: This is how custom fields are referenced via scripting. If a script is dependent on a custom field being set to a certain value (for example, if “Non-profit” is not checked), then the following script would be utilized. Keep in mind the actual field name (not the label) needs to be used:
    - AInfo[“<*asi\_name>*”] == <*value>*
    - Example: AInfo[“Non-profit”]==”CHECKED”
  + Date fields: Dates can be challenging to work with. Here is a list of helpful date functions:
    - sysDate: This is a global variable for accessing today’s date. This can be used for a variety of function.
    - sysDate.getMonth(): This is the current month.
    - sysDate.getDayOfMonth(): This is the current day.
    - sysDate.getYear(): This is the current year (four digits).
  + Other helpful functions.
    - parentCapId: This is a global variable for accessing the current record’s parent record.

**Functionality**

* Notifications – App Submittal
  + Scripts
    - ASA:\*/\*/\*/\*
    - sepEmailNotifContact() function
    - sepProcessContactsForNotif() function
    - sepSendNotification() function
  + Summary: Sends email notifications, plus a report if indicated, when the record is submitted. It can be sent to one or more contacts on the record, and will respect the contact’s preferred channel (method of contact) if indicated.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Contact Type: This can be a single contact type, a comma-separated list, or “ALL”. Required.
    - Respect Preferred Channel: Yes or No. Only sends the email if there is no preferred channel or the preferred channel is set to “Email”. Required.
    - Notification Name: The email template notification name. Can only take one value. Required.
    - Report Name: If a report should be attached to the email, list the report name from Report Manager here. Can only take one value. Not required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Notifications – Workflow
  + Scripts
    - WTUA:\*/\*/\*/\*
    - sepEmailNotifContactWkfl() function
    - sepProcessContactsForNotif() function
    - sepSendNotification() function
  + Summary: Sends email notifications, plus a report if indicated, when the indicated workflow task is set to the indicated status. It can be sent to one or more contacts on the record, and will respect the contact’s preferred channel (method of contact) if indicated.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Contact Type: This can be a single contact type, a comma-separated list, or “ALL”. Required.
    - Respect Preferred Channel: Yes or No. Only sends the email if there is no preferred channel or the preferred channel is set to “Email”. Required.
    - Notification Name: The email template notification name. Can only take one value. Required.
    - Report Name: If a report should be attached to the email, list the report name from Report Manager here. Can only take one value. Not required.
    - Task Name: If not populated, then any task set to the given status will send the notification. Can only take one value. Not required.
    - Task Status: When the status is set to this value, the notification is sent. Can only take one value. Required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Reqd Documents – App Submittal
  + Scripts
    - ASB:\*/\*/\*/\*
    - sepGetReqdDocs() function
    - ACA\_BEFORE\_REQD\_DOCS.js
  + Summary: Checks to see if all required documents have been submitted with the application is submitted. It can be run from either AA or ACA. If it is going to be run from ACA, the pageflow script “ACA\_BEFORE\_REQD\_DOCS” needs to be added to the Before button for the associated page in the pageflow. If there is another script that is needed in that location, the pageflow scripts can be combined.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Custom Field Name: Populate if a custom field needs to be set to a specific value. Single value only. Not required.
    - Custom Field Value: Value the custom field is set to if the document is to be required. Single value only. Not required.
    - Document Group: The document group name. Single value only. Required.
    - Document Type: The document type name. Single value only. Required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Reqd Documents – Workflow
  + Scripts
    - WTUB:\*/\*/\*/\*
    - sepGetReqdDocs() function
  + Summary: Checks to see if all required documents have been submitted before the workflow is updated.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Task Name: If not populated, then any task set to the given status will check the required documents against what has been uploaded. Can only take one value. Not required.
    - Task Status: When the status is set to this value, check the required documents against what has been uploaded. Can only take one value. Required.
    - Custom Field Name: Populate if a custom field needs to be set to a specific value. Single value only. Not required.
    - Custom Field Value: Value the custom field is set to if the document is to be required. Single value only. Not required.
    - Document Group: The document group name. Single value only. Required.
    - Document Type: The document type name. Single value only. Required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Prevent Workflow Update
  + Scripts
    - WTUB:\*/\*/\*/\*
    - sepStopWorkflow() function
  + Summary: Checks to see if all requirements listed in the table have been filled before allowing the workflow to be updated per the rules.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Task Name: If not populated, then any task set to the given status will check the required documents against what has been uploaded. Can only take one value. Not required.
    - Task Status: When the status is set to this value, check the required documents against what has been uploaded. Can only take one value. Required.
    - Event: A dropdown. Required. Is one of:
      * Child Record Status: A child record of the type listed in the “Required Elements List” with the corresponding status must exist.
      * Custom Fields: the criteria listed in the “Required Elements List” must resolve to true.
      * Documents Required: The documents listed in the “Required Elements List” must be attached to the record.
      * Fees Due: The fees listed in the “Required Elements List” must be paid to the record. If “Required Elements List” is empty, then all fees must be paid.
      * Inspections Scheduled: The inspections listed in the “Required Elements List” must be completed.
    - Required Elements List:
      * Child Record Status: The four-level record structure, followed by a comma and the status. If there are multiple child record types or statuses, separate each pair with a pipe.

*Example*: Building/Residential/Alteration/Amendment,Approved| Building/Residential/Alteration/Amendment,Denied

* + - * Custom Fields: The custom field name, the comparison operator and the value. If there are multiple values, they can be comma separated (if all resolve to true, or can be strung together with javaScript comparison operators. “AInfo” is not required for single instances, but is if there are two comparisons linked by a comparison operator.

*Examples*: Total Square Footage>5000

Total Square Footage>5000,Total Square Foot<10000

AInfo[“Total Square Footage”]<5000 || AInfo[“Total

Square Footage”]>10000

* + - * Documents Required: The document group, a comma and the document type. If there are multiple documents, separate each pair with a pipe.

*Example*: BLD,Photos|BDL,Plan Review

* + - * Fees Due: Fee code. If there are multiple fees, separate each pair with a pipe.

*Example*: FEE001|FEE002

* + - * Inspections Scheduled: The inspection type required. If there are multiple inspections, separate each pair with a pipe.
      * *Example*: Final Building|Final Mechanical
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Fees – App Submittal
  + Scripts
    - ASA:\*/\*/\*/\*
    - sepUpdateFeesAppSub() function
  + Summary: When the record is submitted, the associated fee(s) are added.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Fee Schedule: The fee schedule in which the fee to be added exists. Single value only. Required.
    - Fee Code: Fee code of the fee to be added. Single value only. Required.
    - Fee period: Fee period of the fee to be added. Single value only. Required.
    - Fee Quantity: Fee quantity of the fee to be added. Single value only. Required. This can be any one of the following:
      * A number
      * A custom field (the field name, no qualifier)
      * “estValue”: for the “Job Value” value on the Additional Information portlet.
      * A calculation that resolves to a number. For example: AInfo[“Square Footage”]\*5
    - Duplicate Fee: If set to “Yes”, allows fee to be duplicated if it is found. Yes or No. Required.
    - Auto Invoice: If set to “Yes”, invoice the fee once it has been assessed. Yes or No. Required
    - Custom Field Name: If the fee is added based on a custom field value, the custom field name goes here. Single value only. Not required.
    - Custom Field Value: If the fee is added based on a custom field value, the custom field value goes here. Single value only. Not required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Fees – Workflow
  + Scripts
    - WTUA:\*/\*/\*/\*
    - sepUpdateFeesWkfl() function
  + Summary: When the workflow is updated to a given task/status, the associated fee(s) are added.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Task Name: If not populated, then any task set to the given status will the associated fee. Single value only. Not required.
    - Task Status: When the status is set to this value, add the associated fee. Can only take one value. Required.
    - Fee Schedule: The fee schedule in which the fee to be added exists. Single value only. Required.
    - Fee Code: Fee code of the fee to be added. Single value only. Required.
    - Fee period: Fee period of the fee to be added. Single value only. Required.
    - Fee Quantity: Fee quantity of the fee to be added. Single value only. Required. This can be any one of the following:
      * A number
      * A custom field (the field name, no qualifier)
      * “estValue”: for the “Job Value” value on the Additional Information portlet.
      * A calculation that resolves to a number. For example: AInfo[“Square Footage”]\*5
    - Duplicate Fee: If set to “Yes”, allows fee to be duplicated if it is found. Yes or No. Required.
    - Auto Invoice. If set to “Yes”, invoice the fee once it has been assessed. Yes or No. Required
    - Custom Field Name: If the fee is added based on a custom field value, the custom field name goes here. Single value only. Not required.
    - Custom Field Value: If the fee is added based on a custom field value, the custom field value goes here. Single value only. Not required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Inspections – App Submittal
  + Scripts
    - ASA:\*/\*/\*/\*
    - sepSchedInspectionAppSub() function
  + Summary: When the record is submitted, the associated inspection(s) are added.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Inspection Group: The group name of the inspection to be added. Single value only. Required.
    - Inspection to Schedule: The name of the inspection to be added. Single value only. Required.
    - Pending/Scheduled: Whether the inspection should be scheduled or added as pending. Drop down. Required.
    - Days Ahead to Schedule: How many days in the future the inspection should be scheduled. Number. Required.
    - Calendar/Working Days: Whether the days ahead should be calendar (30 days is about a month) or working (5 business days). Drop down. Required
    - Custom Field Name: If the inspection is added based on a custom field value, the custom field name goes here. Single value only. Not required.
    - Custom Field Value: If the inspection is added based on a custom field value, the custom field value goes here. Single value only. Not required.
    - Additional Query: Populate if another parameter for sending the notification is required (such as a custom field being set to a specific value). Must be valid JavaScript. Can use standard or custom functions. Not required.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.
* Batch - Renewals
  + Scripts
    - BATCH\_EXPIRATION\_SWADDLE.js
  + Summary: This can be used for notifications, expirations, and delinquencies.
  + Fields
    - Record Type: The four-level record type. “\*” can be used as a wildcard. Required.
    - Look Ahead Days: This is the number of days to look ahead for the expiration date. For example, if this is for a 30 day notification, the value should be “30”; if it is for a two week delinquency, the value should be -14. Days only. Single value only. Required.
    - Day Span: This is normally used only for testing; otherwise, it will be set to zero(0). It is to set a range of days for searching for the expiration date. For example, if you are testing an expiration batch job and records are set to expire at the end of the month and you are testing the batch job on the 15th, “Look Ahead Days” would be set to zero, so “Day Span” can be set to “16” to look at all expiration dates between today (the fifteenth) and the 31st of the month (or the first, if the month has 30 days).
    - Expiration Status: This is the status for which the batch job will look to find records to process. Single value only. Required.
    - Skip Application Statuses: This is a list of record statuses that should exclude a record from processing, such as “Withdrawn”, “Void”, or “Closed”. Comma separated values. Optional.
    - Filter Expression: A valid JavaScript expression to exclude records from being processed. Must be valid JavaScript that resolves to true or false. Optional.
    - Grace Period Days: Number of days added to the expiration date if there is a grace period for renewing. Numeric. Optional.
    - Create Renewal Record: Whether or not the renewal record should be created by the batch job rather than when the applicant renews the record. Yes/No. Required.
    - Deactivate License: Whether or not to deactivate the associated Licensed Professional record. Yes/No. Required.
    - New Application Status: The application status to which the record should be set when the batch job is run. For example, if the batch job is processing Active records, then the new application status may be “About to Expire”. Single value. Required.
    - New Expiration Status: The status to which the expiration status (under the Renewal Info tab) should be set. Has to match one of the listed values. Single value. Required.
    - Parent License Condition: Whether or not the parent license record should have a locked condition placed on it. Yes/No. Required.
    - Fee Schedule: The fee schedule in which the fee to be added exists. Single value only. Optional.
    - Fee period: Fee period of the fee to be added. Single value only. Optional.
    - List of Fees: List of fees to be added to the record. Comma delimited. Not required.
    - Parent Fee Schedule: The fee schedule in which the fee(s) to be added to the parent license exists. Single value only. Optional.
    - Parent Fee period: Fee period of the fee(s) to be added to the parent license. Single value only. Optional.
    - Parent Fee List: List of fees to be added to the parent record. Comma delimited. Not required.
    - Parent Fee period: Fee period of the fee to be added to the parent record. Single value only. Optional.
    - Email Template: The email template notification name. Can only take one value. Required.
    - Contacts Receiving Notification: This can be a single contact type, a comma-separated list, or “ALL”. Required if an email is to be sent.
    - Report Name: If a report should be attached to the email, list the report name from Report Manager here. Can only take one value. Not required.
    - Respect Preferred Channel: Only sends the email if there is no preferred channel or the preferred channel is set to “Email”. Yes or No. Required.
    - Set Parent Task/Status: The task and status (comma separated) to which the parent license workflow should be set. One set of values. Optional.
    - Task to Assign: If a task on the record being processed should be assigned. One value. Optional.
    - Assign Task To: The user ID of the person to which the task should be assigned. One value. Required if “Task to Assign” is populated.
    - Create a Set: Whether the records should be added to a set. Yes/No. Required.
    - Set Prefix: The prefix of the set name to be created. One value. Required if a set is being created.
    - Set Status: The initial status to which the set itself (not the members) should be set. One value. Required if a set is being created.
    - Set Type: The type of set to be created. Must be an existing Set Type. One value. Required if a set is being created.
    - Addtl Action to Perform: If anything else needs to occur in this batch job. Must be valid JavaScript. Optional.
    - Send Batch Logs To: If the batch logs need to be sent to anyone, enter their email address here. One value (email address). Optional.
    - Comment/Description: Summary of what the row is supposed to do. Highly recommended.
    - Active: Yes or No. The row will only trigger if set to “Yes”. Required.