Attach PDF from Word Template Including Activity Data

This document describes how to create an Activity Macro that will:

1. Create a PDF file that includes Activity data related to selected Activity records
2. Create Note records that reference the selected Activity records
3. Attach the PDF file to the Note record
4. Email employees with the PDF as an attachment
5. Print the PDF when the employee doesn’t have DistributionEmail set
6. Update the reference field of an Activity record with the GUID of the Note record

This specific Activity Macro example is used by HR staff to notify employees when they have a Health Coverage Offer and they need to complete and return a response form to the HR department.

The process for the HR staff would be:

1. Click the ACA Dashboard link when there are ACA Result Records showing as **Pending Notification of Offer.**
2. Select which (usually all) of the Employees listed that you are ready to notify and run the Activity Macro named, “ACA Notify Employee of Offer”.
   1. As the Macro runs, the dashboard will show the number dropping for ACA Result Records showing as **Pending Notification of Offer.**
3. Collect the printed “Employee Health Insurance Offer” option forms from the printer and place in envelopes to be mailed.
4. Verify that the Outlook Sent folder contains the same list of email addresses as stated on the **Notified** Note records that were just created with a description of “Offer sent via Email to <Employee Name>”.
5. Verify that the names on the printed notifications match the **Notified** Note records that were just created with a description of “Offer sent via Print”.

Now for the How-To:

Example Word “template” document:

AA-Employee\_HealthInsOffer.docm

Example Activity Macro vb file:

ACA Notify Employee of Offer.vb

1. To create a PDF file that includes Activity data related to selected Activity records:
   1. Create a Word “template” document:
      1. Include Content Control fields for locating information that comes from Activity.
      2. Include the Visual Basic macro module to allow the interface to the Activity Automation Server.
      3. See the Example Word template document
   2. Create code in the Activity Macro to load the content controls use by the Word “template” document from the Activity data.
      1. See the **Load the content control values** section of the example Activity Macro
   3. Create code in the Activity Macro to save a PDF version of the Word document.
      1. See the **Run Word and execute the “CreatePDF” macro** section of the example Activity Macro
2. Create Note records and reference the selected Activity records
   1. Create code in the Activity Macro to create a Note record.
      1. See the **Create a new Note** section of the example Activity Macro
3. Attach the PDF file to the Note record
   1. Add this line to the Activity Macro after the **Save** of a newly created Note record:

note\_data.Fields("Attachments").Items.Add pdf\_filename

1. Email employees with the PDF as an attachment
   1. Create code in the Activity Macro to send an Email.
      1. See the **Email the pdf** section of the example Activity Macro
2. Print the PDF when the employee doesn’t have DistributionEmail set
   1. Create code in the Activity Macro to Print a file.
      1. See the **Print the pdf** section of the example Activity Macro
3. Update the reference field of an Activity record with the GUID of the Note record
   1. Create code in the Activity Macro to locate the record you wish to update (if that record isn’t already accessed).
   2. Use the edit action
   3. Set the values you wish to modify
   4. Save the modified record
      1. See the **Update the selected ACA Record** section of the example Activity Macro