

# ClientSpace Setup & Administration



A guide for configuring ClientSpace

ClientSpace R151

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# Chapter 1

# Accessing ClientSpace System Administration

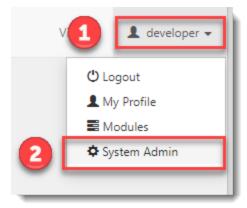
System administration of the ClientSpace system is limited to global administrators. Navigation to the System Administration area is described as **Go to System Admin**. This means that from the modules bar, you select your *username*, and then select **System Admin**.

**Note:** Out of the box, you are not given access to the Advanced system settings. To gain Advanced Administration access, please create an Extranet case.

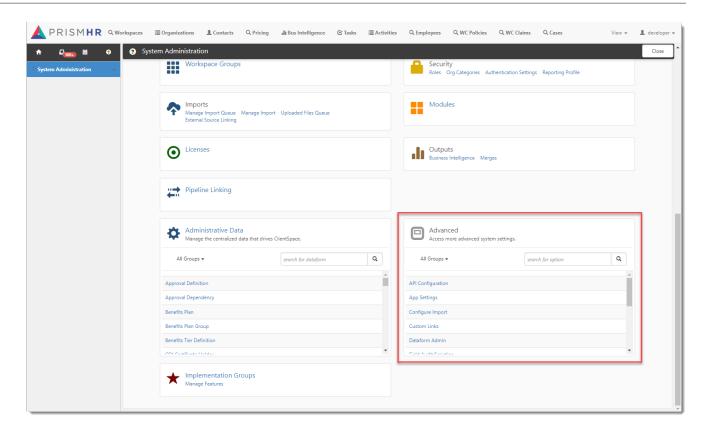
### Administrative Dashboard

#### To access the administrative area of ClientSpace:

- 1. Click your username in the top right corner of the ClientSpace window. EX: developer
- 2. Click System Admin .



The System Administration dashboard opens. The Advanced system settings box is located in the bottom right corner.

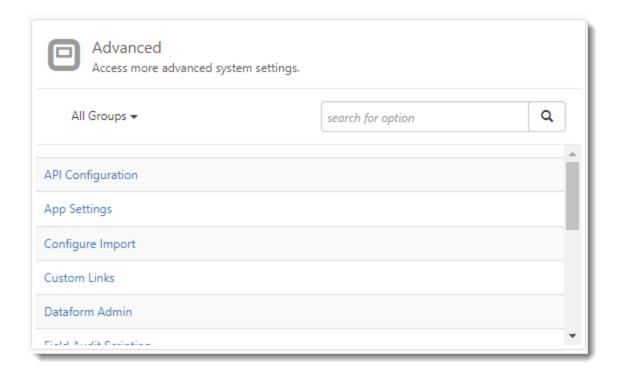


## **Advanced Administration Functions**

Advanced Administrative functions require an Advanced Administrator License. Help topics that discuss Advanced Administration are labeled with .

#### To configure any of the Advanced system settings:

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.



Select an option.The selected option opens.

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

## **Advanced Administration Training**

While the Help Center contains several topics on Advanced Administration Configuration (which we have referenced in the list below), Advanced Administration training is required to gain access to this part of the system. In Advanced Administration training, you receive hands on training where you can ask questions and receive specific guidance as you learn. The training consists of eight (8) one-hour training sessions. We can set up the sessions to go at your speed. For example, two sessions per week, one session per week, etc. Anyone from your company is welcome to join!

In Advanced Administration training you will learn how to:

- Create, move, edit, and delete your own dataforms and dataform fields.
   Also see Adding a dataform and Adding Dataform Fields.
- Set up your own business rules.
   Also see Configuring Rules and Business Logic.
- Add and remove dataform links such as Complete or In Progress.

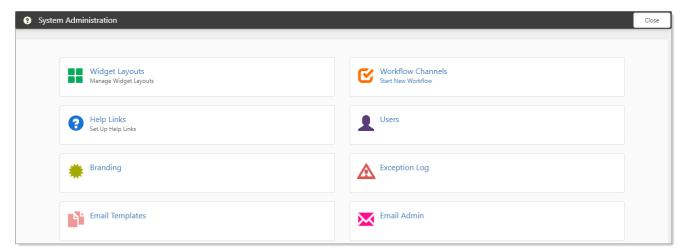
Also see Configuring Custom Dataform Links.

- Configure Field Display rules to hide and show fields when certain conditions are met. Also see Configuring Dynamic Field Display.
- Create and update your own imports.
   Some possible use cases might be to import all default hours spent on every case type or to create your own form and auto-populate the fields from a spreadsheet you use.
   Also see Importing data and CSV Import File Creation Macro.
- Learn how to review your scheduled processes.
   For instance, review how often ad-hoc reports are sent or how long it takes an email template to send emails.

These are just some of the topics we'll cover!

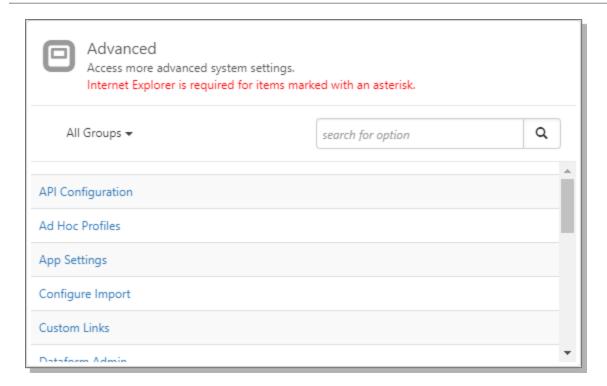
## System Administration dashboard

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 Custom Dataform 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 Custom Dataform Links
- Configuring parent form datatypes
- Configuring Rules and Business Logic
- Configuring the Zip Code datatype
- Dataform field naming standards
- Changing the Number of Decimal Places on a Dataform Field
- Dataforms
- Distributing your dataform: Making dataforms accessible
- Parent form datatype morphing
- Required Field Business Rules

# Chapter 2

# **Email Templates: Basic Configuration**

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, Step 4: Conditions, and Attachments.



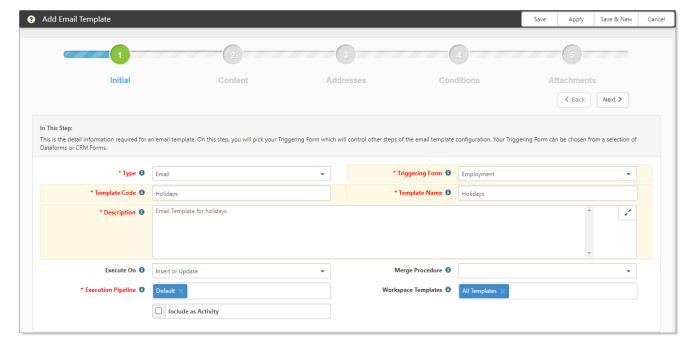
This topic gets you started. After you click **Add**, follow the procedures to complete the five-step process.

### To get started:

- 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.
- To configure an email template, click Add.
   The Choose Email Template Type dialog opens with options to select Real Time or Scheduled.
- Select an Email Template Type.
   The Add Email Template workflow is presented, with a series of steps to start generating your new template.
- 5. What do you want to do?
  - If you selected **Scheduled**, refer to Configuring Scheduled Email Templates for assistance creating a Scheduled Email Template.
  - Otherwise, continue to the next step for setting up a Real Time template: 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.

Туре	For <b>Email</b> notifications:  • Select <b>Email</b> . Default value.	
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 <sup>1</sup> .  To add a dataform that is not in the list:	
	<ol> <li>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.     </li> <li>In Table Name, select a dataform from the list.</li> <li>Click Ok.</li> <li>The selected dataform is marked as triggerable and now appears in the Triggering Form list.</li> </ol>	
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 ( <b>Insert</b> ), only when the form is changed ( <b>Update</b> ), or every time ( <b>Insert or Update</b> )? 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.	

<sup>&</sup>lt;sup>1</sup>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.

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 <sup>1</sup> also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines <sup>2</sup> 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.
	<b>Note:</b> If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new email template, pipelines assigned a behavior of Default will auto-fill the <b>Execution Pipeline</b> field. If you are editing an existing email template, <b>Execution Pipeline</b> entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the <b>Execution Pipeline</b> list. If the same pipeline is assigned a behavior of Disallow, you will not be able to add it again.  See Configuring Pipeline Linking.
Workspace Templates	Select the Workspace Templates <sup>3</sup> 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. By default, the option is cleared, meaning do not include the email as an activity. If you select this option and the email template includes an attachment, the system uploads any attachments to the activity when it is created

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

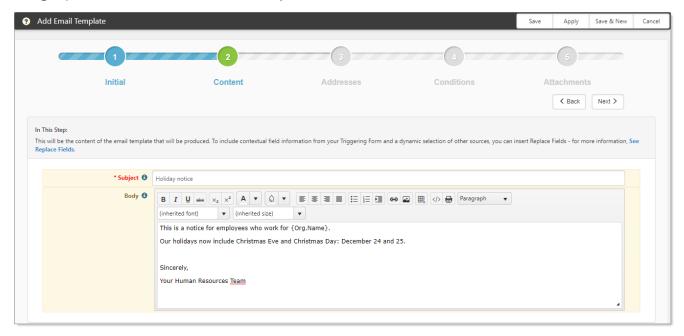
<sup>&</sup>lt;sup>1</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

<sup>&</sup>lt;sup>2</sup>A pipleline determines which rules are applied when the data is saved.

<sup>&</sup>lt;sup>3</sup>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.

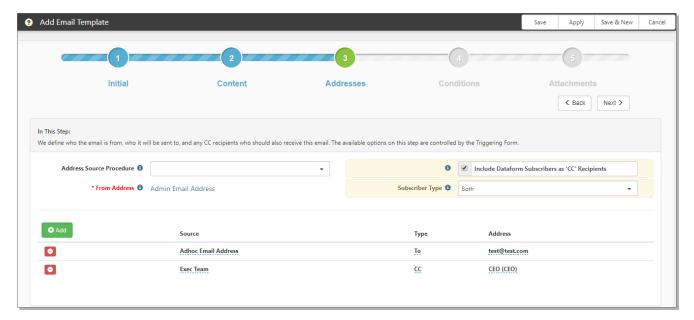
#### Field replacement includes:

- 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.

# 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 <b>emailtemplate_recipient_proc</b> . The recipient proc list only displays valid options based on the Triggering Form in Step 1.
Include Dataform Subscribe rs as CC	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 enabled (selected), this option presents a list to notify internal, external, or both recipient types:

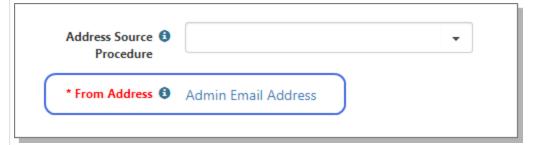
#### Recipients

- **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.

**Note:** If you select this option, use the {RecipientsCC} replacement field in the Body of the message on **Step 2: Content** when you want to include the email address of the CC recipient(s) in the email message. See Step 2: Content.

## From Address

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.



- 2. 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 Extranet case.
  - Current User: Uses the address of the user who is triggering the notification.

**Note: Current User** is not available if you are creating a Scheduled Email Template. This option only works with **Real Time** field analysis to determine the current user.

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.

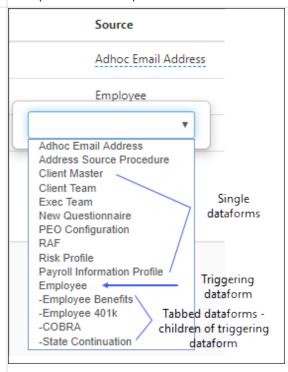
**Note:** If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the **Enable Email for this account** field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template. Note that only a Global Administrator can change this setting. Also see Personalizing Your User Profile.

- **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.

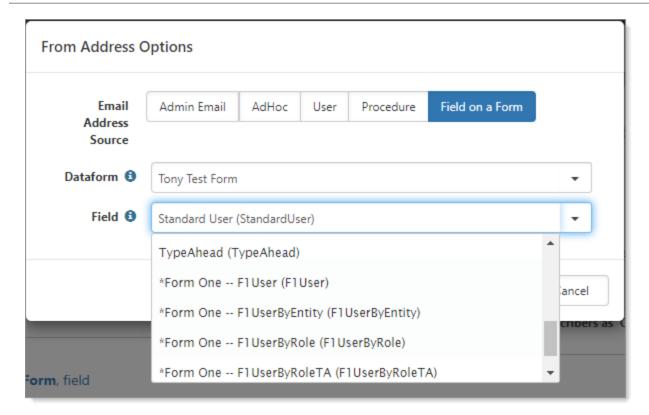
- Adhoc Email Address: When you select as Source, type the email address in the Address field.
- **Employee**: When you select Employee, you can specify Employee Work or Personal Email address in Address. See Specifying Employee Work and Personal Email.
- Address Source Procedure: An email address selected 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.

Туре	What kind of email recipient type are you setting? Options are <b>To</b> or <b>CC</b> . <b>Note:</b> Use the {RecipientsTO} and {RecipientsCC} replacement fields in the Body of the message on <b>Step 2: Content</b> when you want to include the email addresses of the TO and CC recipients in the email message. See Step 2: Content.
Address	<ul> <li>For a dataform source, select the user or contact type field on the form from which you would like to extract the email address.</li> <li>When Source is Address Source Procedure, select a recipient type such as AdminEmail, CaseSubscribers, CaseTypeRoleUsers, ImmediateSupervisor, EmployeePersonalEmail, EmployeeWorkEmail, ReportedByEEPersonalEmail, or ReportedByEEWorkEmail.</li> </ul>
	<ul> <li>Note: Recipient type options may vary depending on the selected Address Source Procedure.</li> <li>When Source is Adhoc Email Address, use this field to type an email address to use every time manually.</li> </ul>

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

#### From a Field on a Form

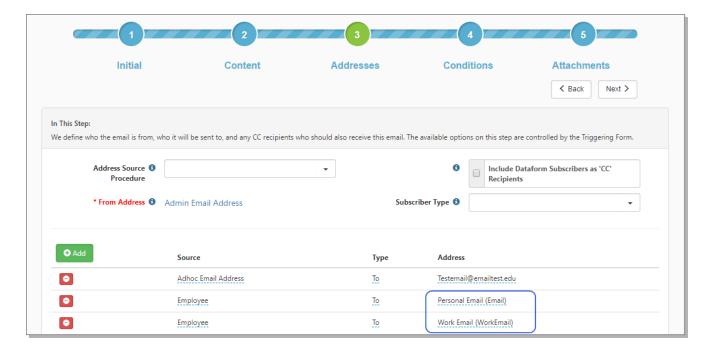
From the From Address Options dialog box, when you select **From a Field on a Form**, you can set user fields to values that exist on dataforms across a tabbed set. You can choose from which Dataform and then when you select a dataform, choose the Field. The Dataform drives the items in the Field list 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 <b>Employee</b> to enable the Work and Personal Email in the Address column.
Type	What kind of email recipient type are you setting? Options are <b>To</b> or <b>CC</b> .
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.

**Note:** If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the **Enable Email for this account** field on their user profile is unchecked, they

cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.

Note that only a Global Administrator can change this setting.

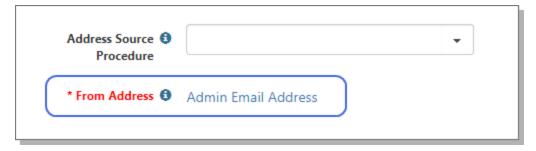
Also see Personalizing Your User Profile.

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:

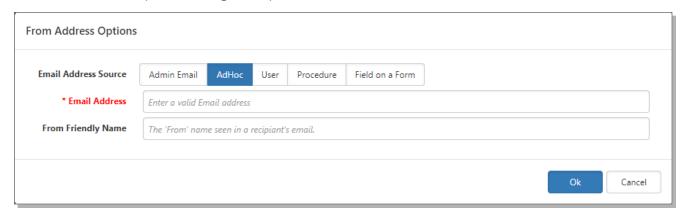
PrismHR Support <support@prismhr.com>

#### 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.

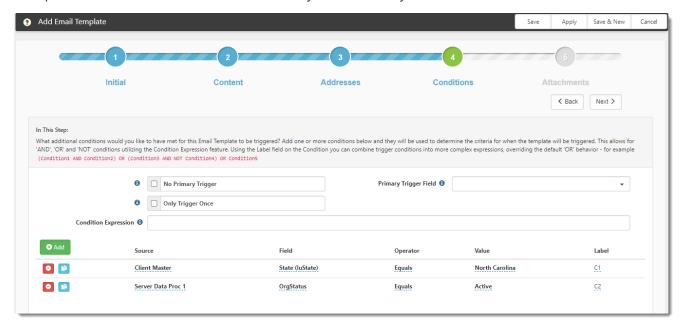
## 4. Click **Ok**.

# 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 <b>Primary Trigger Field</b> is disabled.	
Only Trigger Once	When selected, the email template is triggered only once when the conditions are first met. Do not select this option if you want the email template to trigger each time the conditions are met.	
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.	
	<ul> <li>configured action link on the form.</li> <li>The following statements refer to the condition entries in the Add area.</li> <li>Condition entries are identified with a Label (the last column).</li> <li>If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions.</li> <li>If a Primary Trigger Field is not selected, only the conditions are evaluated.</li> <li>If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND.</li> <li>If no Condition Expression is used, the additional conditions are treated as OR conditions.</li> <li>The Primary Trigger Field only displays fields associated with the triggering dataform and includes the ability to Add Untriggered Field.</li> </ul>	

## 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	The <b>Source</b> list includes the triggering form and its tabs, the channel trigger (i.e., the original form that started the channel), all triggerable, active singleforms, and the tabs of those single-forms. Applicable server data procs, if configured, may also be included.
	When you select <b>Task</b> as the Triggering Form in Step 1 Initial, in this step

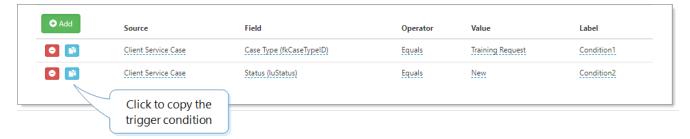
#### Source sets to Task. Field Task fields Select the dataform or Stored Procedure field to compare to the trigger value. Comments A few notes: Assigned To • Email Template triggering provides Body Category multi-lookup fields (Multi Lookup Comments (MultiLookup)) as triggering conditions. Due Date Source fkCompletedByUserID • Field supports parent form fields. IsMarkedForDeletion Available operators are Empty, Not Owner Priority Empty, and Is Dirty. Send Notification **Note:** If you are creating a Scheduled Stage Start Date Source Email Template, the Is Dirty operator is Status Subject not in the list as real time analysis of a Type field is required to determine an "Is Dirty" state. • Field supports the **Active** dataform setting. Available operators are Does Not Equal, Equals, and Is Dirty (if choosing the triggering form as the Source). Value options are Unchecked and Checked. **Note:** If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state. • 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.
	Note:
	<ul> <li>Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.</li> </ul>
	<ul> <li>If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.</li> </ul>
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 <sup>1</sup> 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. ClientSpace assigns a label to a new condition with the naming convention C#. For example, C1 for the first condition that you create, C2 for the second, and so on. You can change the label name by selecting the name of the label and typing a new name for the label. For example, you can select the <b>C1</b> label and enter <b>Condition1</b> as the new label name.
	<b>Tip:</b> Make this label short and representative of the Trigger Field. Labels are used in the Condition Expression field.
Condition Expression	Allows for <b>AND</b> , <b>OR</b> , and <b>NOT</b> 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.

 $<sup>^{1}\</sup>mathrm{As}$  you type in the field, one or more matches for the term are found and immediately presented.

## 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**.

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

3. Complete the form fields:

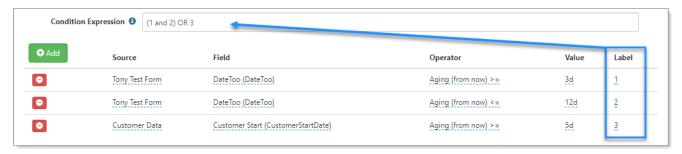
Field	Select a <b>Date</b> or <b>Date Time</b> datatype field. This action makes the Aging operators available in <b>Operator</b> . <b>Note:</b> When comparing <b>Date</b> to <b>Date Time</b> datatypes (or vice versa) 12:00:00AM is used as the comparison time for the <b>Date</b> datatype.
Operator	Select one of the following:
	• Aging (from now) > =
	<ul> <li>Greater than or equal to the number of days/months/years in Value.</li> </ul>
	• Aging (from now) < =
	<ul> <li>Less than or equal to the number of days/months/years in Value.</li> </ul>
	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:
	• mm: for minutes
	• h: for hours
	• <b>d</b> : 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.



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.

Туре	Description	Label
FieldValueExpression	gen_Property.OwnerOccupied Equals Yes	00
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
<ul> <li>The first grouping has two sets of parentheses:</li> <li>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.</li> </ul>	(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 <b>(GA OR AL)</b> )
Second group - the OR	
<ul> <li>The second grouping has two sets of parentheses:</li> <li>The first group is SECenv. You need a set of parentheses for this major group.</li> </ul>	(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



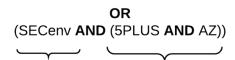
1. Must be owner occupied

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.



1. Must have at least view rights

Must have at least 5 stories
 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))

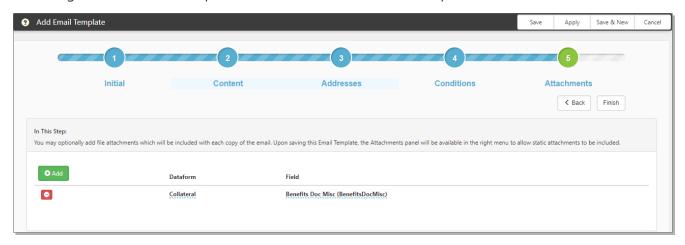
- If the property is owner-occupied and is located in Georgia or Alabama, then the evaluation ends because the condition has been met. The OR portion is ignored.
- However, if there are no properties that are owner-occupied in either Georgia or Alabama, then the OR expression is evaluated. The OR portion 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:

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.
- Click Choose File.File Explorer opens.

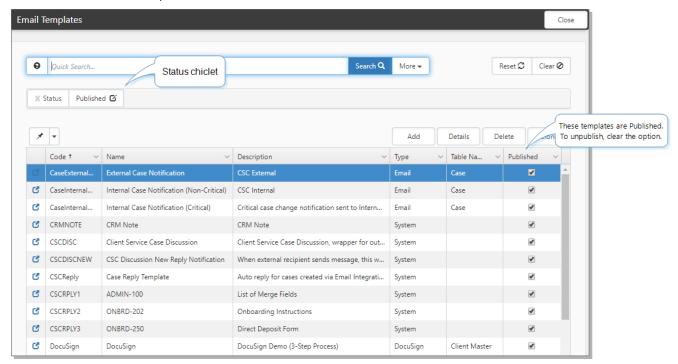
- Locate the file and click **Open**.
   You are returned to the Upload File dialog box.
- 5. Optionally, you can provide Description, Category, and Tags information.
- 6. Click Save.
- 7. Click **Finish** to complete your email template configuration.

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

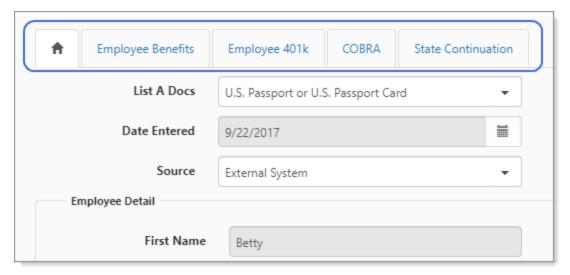


Video

View the video about Using Email Templates in ClientSpace.

# 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

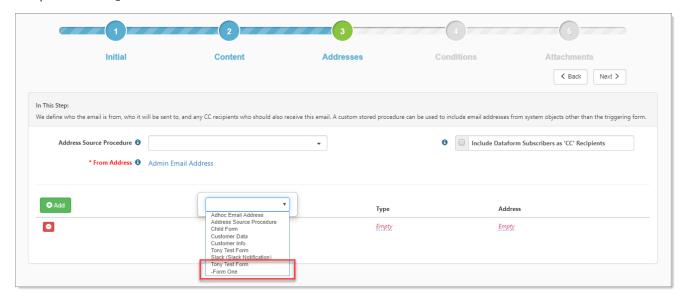
On the Addresses step, when adding a new address in the **Source** list, the recipient source can be:

- 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**

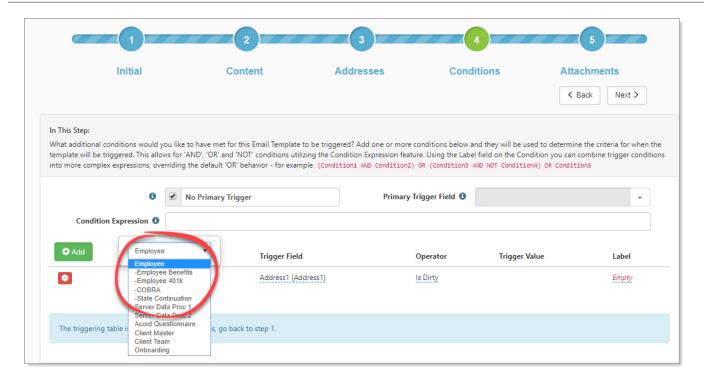
In the Source column, when a tabbed dataform is selected, the Address field displays a selector for user and email type fields that are on the dataform from the tabbed set. The Source list includes all tabbed forms included in the tabbed set. The tabbed dataforms appear immediately after the triggering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



# 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:

- 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 <b>Add</b> . See Configuring Email Templates.
Details	To view details about an email template, click <b>Details</b> .
Delete	To delete the selected email template, click <b>Delete</b> .
Clone	To clone an email template, click <b>Clone</b> .
Publish and Unpublish	When selected, the <b>Published</b> column indicates the email template is published.  • To unpublish the email template, clear the <b>Published</b> option.

Action	Description
	<ul> <li>To publish an unpublished email template, select the <b>Published</b> option.</li> </ul>
View Published and Unpublished Email Templates	By default, the <b>Status</b> chiclet is set to <b>Published</b> . <b>To toggle the Status:</b>
	<ol> <li>Click the <b>Status</b> chiclet <b>Published</b>.</li> <li>The More dialog opens.</li> </ol>
	2. Select a <b>Status</b> : All, Published, Unpublished.
	<ol> <li>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.     </li> </ol>
	<ul> <li>4. You can also click the X beside Status Published. This action displays all email templates: published and unpublished.</li> <li>5. To reset the view back to Published, click Reset.</li> </ul>

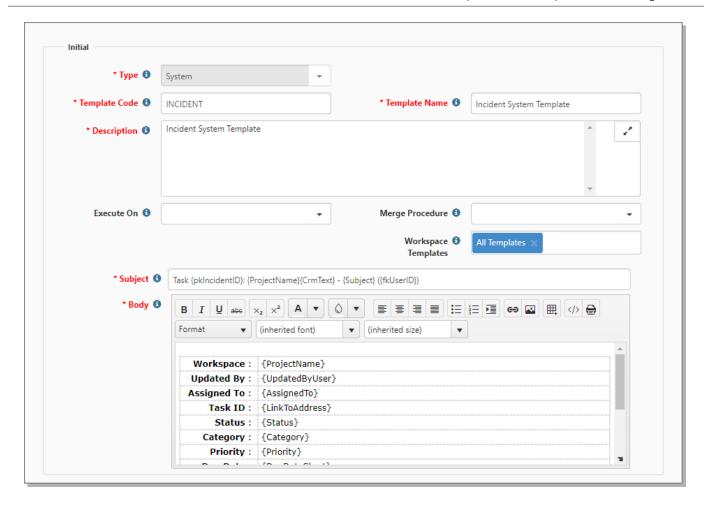
# Sending task notifications through Email Templates

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).

**Note:** If the logged in user is a notify user on the task, ClientSpace will not send an email notification to that user, but will notify other users: Owner, Assigned To, and Subscribers of the task.

#### System Email Templates include:

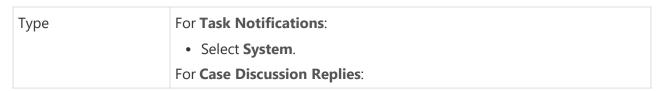
- The System Email Template for Incidents contains the Task Comments field (The Comments field is not included in the fields that changed list).
- On creation of a new Task, the Updated By User replace field populates.



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

#### To create a System Email Template for task notifications:

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



	<ul> <li>Select 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.     </li> <li>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.</li> </ul>
Template Code	Type code is <b>INCIDENT</b> .
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 ( <b>Insert</b> ), only when the form is changed ( <b>Update</b> ), or every time ( <b>Insert or Update</b> )? 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.
Workspace Templates	Select the Workspace Templates <sup>2</sup> to receive this email.

<sup>&</sup>lt;sup>1</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

<sup>&</sup>lt;sup>2</sup>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.

#### 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:

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

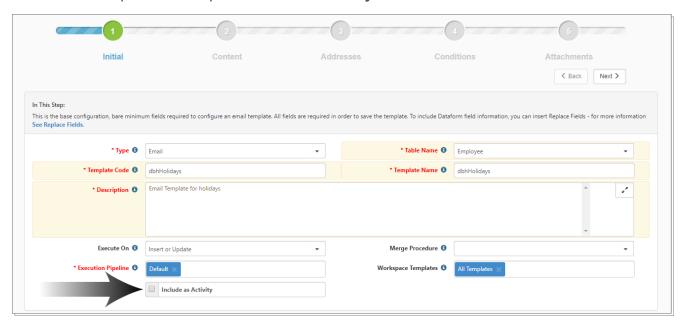
The selected file now displays in the Attachments panel.

# 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.

If you select the **Include as Activity** option and the email template includes an attachment, the system uploads any attachments to the activity when it is created..

# **Triggering Email Templates from Tasks**

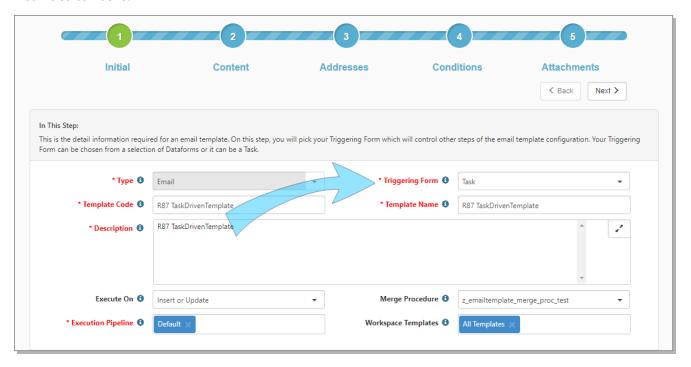
System administrators can trigger email templates from saved tasks. This functionality enables system admins to control the conditions by tailoring the task email templates. For example, you might configure an email template for any updates to a Task and a separate email template for when a Task is marked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

Туре	For <b>Email</b> notifications:  • Select <b>Email</b> . Default value.
Triggering Form	Select <b>Task</b> .  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 <sup>1</sup> .

<sup>&</sup>lt;sup>1</sup>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.

	When you set Triggering Form to <b>Task</b> , this action makes any associated Task fields available on Step 4 Conditions for use as triggering conditions. Task and associated fields are also available for field replacement.
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 ( <b>Insert</b> ), only when the form is changed ( <b>Update</b> ), or every time ( <b>Insert or Update</b> )? 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 <sup>2</sup> 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.
	<b>Note:</b> If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new email template, pipelines assigned a behavior of Default will auto-fill the <b>Execution Pipeline</b> field. If you are editing an existing email template, <b>Execution Pipeline</b> entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the <b>Execution Pipeline</b> list. If the same pipeline is assigned

<sup>&</sup>lt;sup>1</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

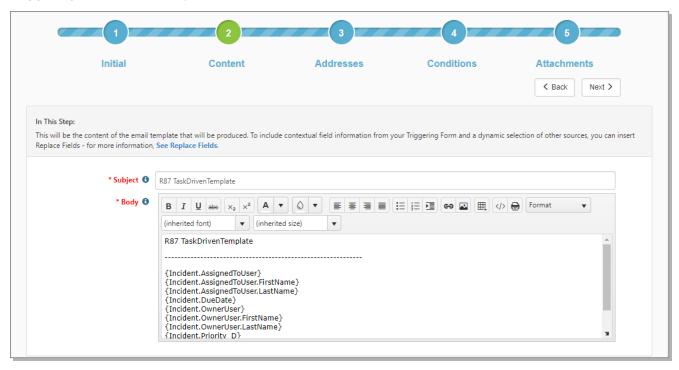
 $<sup>^2\!\</sup>text{A}$  pipleline determines which rules are applied when the data is saved.

	a behavior of Disallow, you will not be able to add it again.
	See Configuring Pipeline Linking.
Workspace Templates	Select the Workspace Templates <sup>1</sup> 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.
- Provide the email message in the **Body**.
   This field uses a rich text editor and supports font styling, embedded images, hyperlinks, and so on.

<sup>&</sup>lt;sup>1</sup>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.

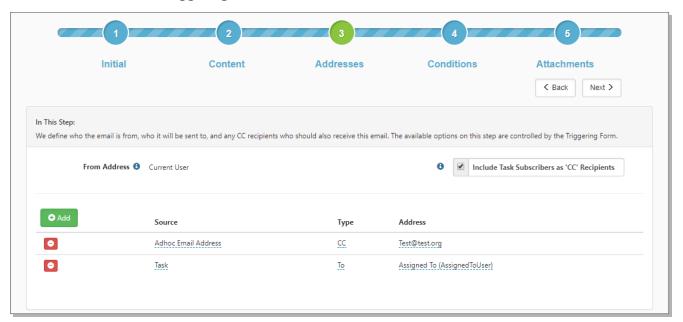
3. Click **See Replace Fields** to select items to copy to the clipboard. You can paste items in Subject and Body as applicable. See Replacement Fields.

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:

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	When this option is selected, it includes anyone who is currently marked as
Subscribers as CC	a Notification user on the triggering Task.
Recipients	

### 2. To add Addresses, click **Add**.

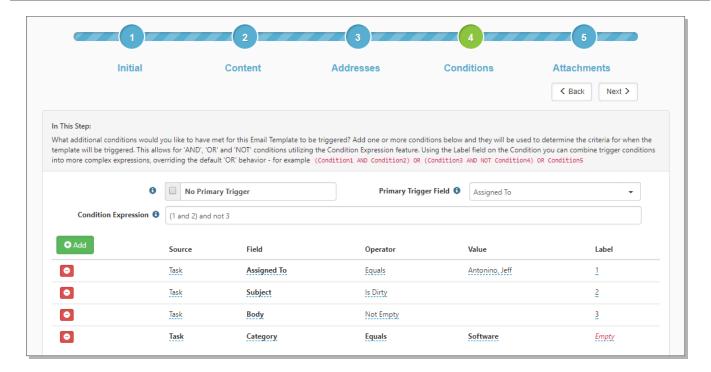
A row opens to add recipients to the notification.

Source	<ul> <li>The Source list includes:</li> <li>Ad-Hoc Email Address: When you select this option, type an email address in the Address column.</li> </ul>
	<b>Note:</b> If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the <b>Enable Email for this account</b> field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.
	Note that only a Global Administrator can change this setting.
	Also see Personalizing Your User Profile.
	• Task: When you select this option, User fields are available for selection in the Address column, such Assigned To.
Туре	What kind of email recipient type are you setting? Options are <b>To</b> or <b>CC</b> .
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.

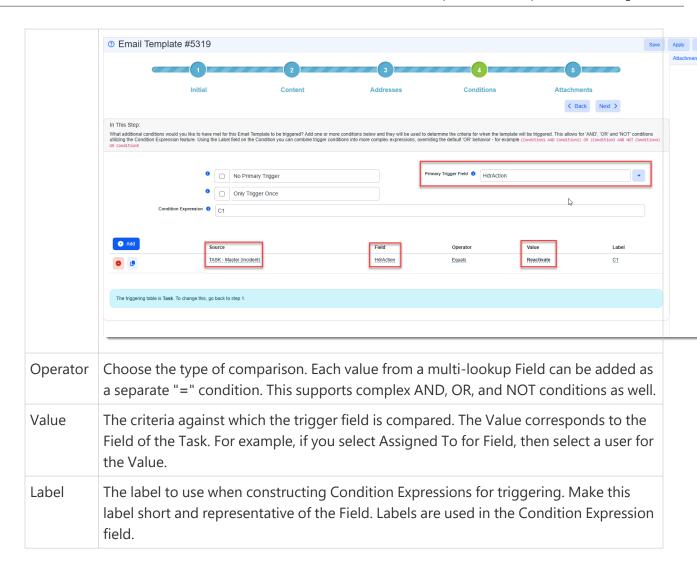


#### To add conditions:

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 <b>Primary Trigger Field</b> 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 <b>Add</b> area. Condition entries are identified with a <b>Label</b> (the last column).
	<ul> <li>If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions.</li> </ul>
	<ul> <li>If a Primary Trigger Field is not selected, only the conditions are evaluated.</li> </ul>
	<ul> <li>If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND.</li> </ul>
	<ul> <li>If no Condition Expression is used, the additional conditions are treated as OR conditions.</li> </ul>
	Primary Trigger Field options for tasks include:

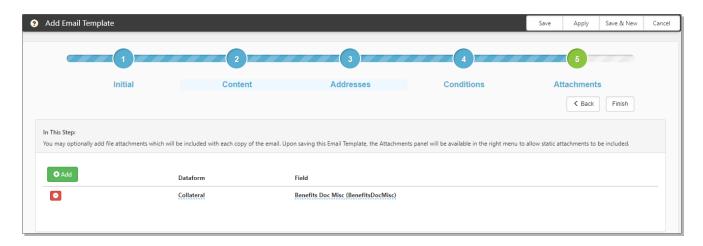
	<ul> <li>Assigned To</li> <li>Body</li> <li>Category</li> <li>Comments</li> <li>Due Date Source</li> <li>fkIncidentTemplateTriggerID</li> <li>Owner</li> </ul>	<ul> <li>Priority</li> <li>Stage</li> <li>Start Date Source</li> <li>Subject</li> <li>Status</li> <li>Type</li> <li>HdrAction</li> </ul>
Condition Expressio n	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 <b>Task</b> as the Triggerin	ng Form in Step 1 Initial, Source is set to <b>Task</b> .
Field	include all task fields.  Note: When the Primary Trigger Fie	ng Form in Step 1 Initial, the options for <b>Field</b> Ild is HdrAction, select HdrAction instead of a ame of the HdrAction link in the <b>Value</b> field as



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.
- 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

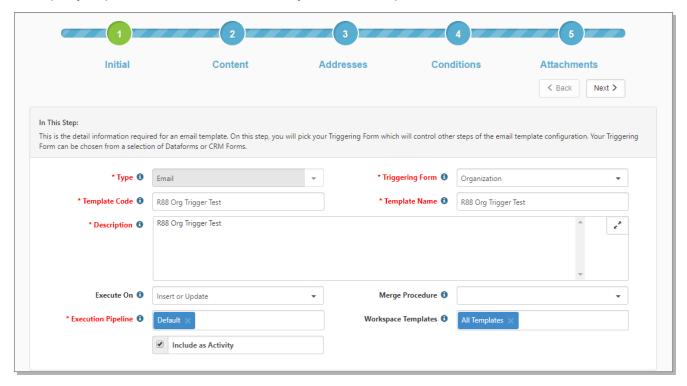
**Note:** Before configuring an email template from the Organization, please log an Extranet case to ensure proper table setup is in place.

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:

Туре	For <b>Email</b> notifications:  • Select <b>Email</b> . Default value.
Triggering Form	Select <b>Organization</b> .  Your selection in the Triggering Form field is the dataform or table where

	dataform <sup>1</sup> .
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 ( <b>Insert</b> ), only when the form is changed ( <b>Update</b> ), or every time ( <b>Insert or Update</b> )? 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 <sup>2</sup> also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines <sup>3</sup> 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.
	<b>Note:</b> If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new email template, pipelines assigned a behavior of Default will auto-fill the <b>Execution Pipeline</b> field. If you are editing an existing email template, <b>Execution Pipeline</b> entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the <b>Execution Pipeline</b> list. If the same pipeline is assigned

<sup>&</sup>lt;sup>1</sup>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.

<sup>&</sup>lt;sup>2</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

<sup>&</sup>lt;sup>3</sup>A pipleline determines which rules are applied when the data is saved.

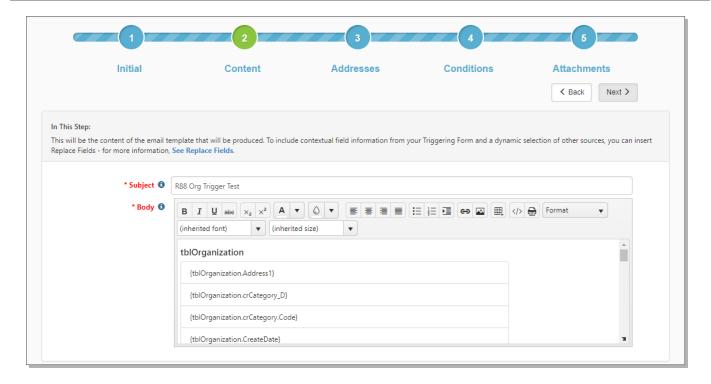
	a behavior of Disallow, you will not be able to add it again.
	See Configuring Pipeline Linking.
Workspace Templates	Select the Workspace Templates <sup>1</sup> to receive this email.
Include as Activity	Select this option to attach the email as an Activity. When the email is triggered, the email message attaches to the triggering record. This action preserves the communication of the sent email. By default, the option is cleared, meaning do not include the email as an activity. If you select this option and the email template includes an attachment, the system uploads any attachments to the activity when it is created

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.

<sup>&</sup>lt;sup>1</sup>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.



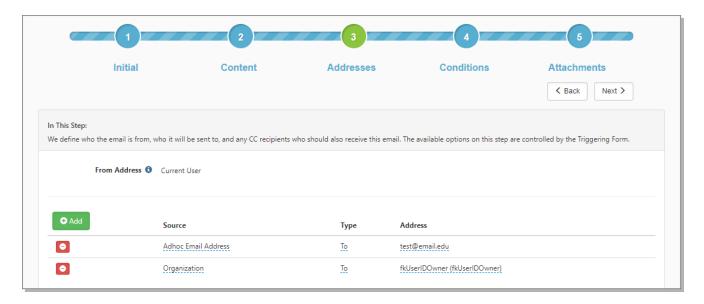
#### To configure the content of the email:

- 1. Provide a **Subject** line of the email to be generated.
- 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.

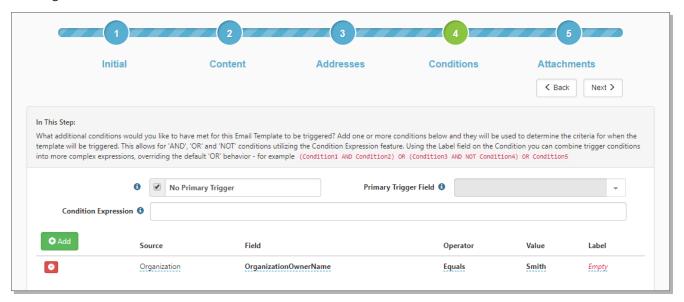
Source	<ul> <li>The Source list includes:</li> <li>Adhoc Email Address: When you select this option, type an email address in the Address column.</li> </ul>
	<b>Note:</b> If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the <b>Enable Email for this account</b> field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.
	Note that only a Global Administrator can change this setting.
	Also see Personalizing Your User Profile.
	<ul> <li>Organization: When you select Organization, user fields become available in the Address column.</li> </ul>

Туре	What kind of email recipient type are you setting? Options are <b>To</b> or <b>CC</b> .
Address	<ul> <li>When Source is Adhoc Email Address, use this field to type an email address to use every time.</li> <li>When Source is Organization, select a user field.</li> </ul>

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:

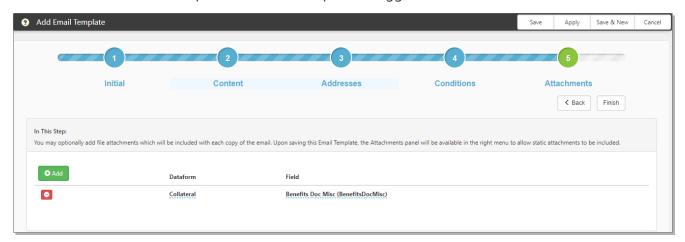
No Primary Trigger	When selected, no single condition must be met to trigger the email template. If this field is selected, the <b>Primary Trigger Field</b> is disabled.
Primary Trigger Field	Optional field (from the Triggering Form selected in Step 1), which, when changed, triggers the event. The following statements refer to the condition entries in the <b>Add</b> area. Condition entries are identified with a <b>Label</b> (the last column).

	<ul> <li>If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions.</li> <li>If a Primary Trigger Field is not selected, only the conditions are evaluated.</li> <li>If a Primary Trigger Field is selected, the conditions are combined with the Primary Trigger Field using an implied AND.</li> <li>If no Condition Expression is used, the additional conditions are treated as OR conditions.</li> </ul>
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 <b>AND</b> , <b>OR</b> , and <b>NOT</b> 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
Source	when you select <b>Organization</b> as the Triggering Form in Step 1 Initial, Source is set to <b>Organization</b> .
Field	When you select <b>Organization</b> 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.
- 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.

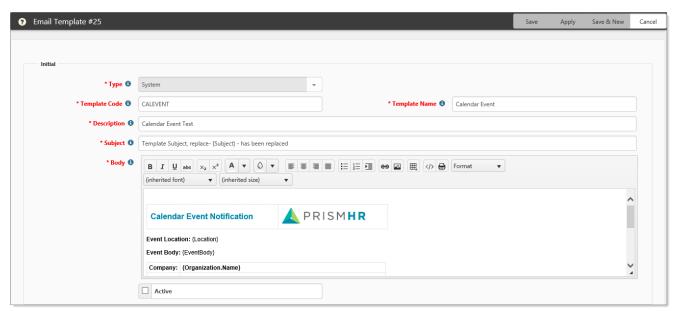
#### To configure a calendar event notification template:

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.

Туре	Select <b>System</b> .
Template Code	Select <b>CALEVENT</b> . Template Code must be unique.
Template Name	Use <b>Calendar Event</b> . 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, <b>{Subject}</b>	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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
CreatedByUser	Event Created By UserID (decoded)	User, Developer	
DateCreated	Event Create Date (short)	5/29/2017	
OrganizationName	Associated Organization Name	415 Group	
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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
OriginalStartDate	Event Original Start Date (raw)	2017-05-30T14:00:00-04:00	
Original End Date	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	
UtcEndDate	Event End Date (UTC raw)	2017-05-30T18:00:00-04:00	
fkOrganizerUserID	Event Organizer UserID	5204	
fkProjectID	Event ProjectID	5218	
pkCalendar EventID	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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
luCalendarEventCategory	Event Category (code value)	SubMeeting1	
fkContactID	Associated Contact ID	2376	
Sequence	Event Sequence	0	
fkOrganizationID	Associated Organization ID	3289	
ParentRowGUID	Parent RowGUID		
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 <b>Organization</b> . <b>{Organization.AKA}</b>	EmployerIDNumber	FEIN	555666- 8888
AKA	DBA	Jim Test DBA	
Address1	Org Address 1		
Address2	Org Address 2		

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
City	Org City		
State	Org State (abbreviated)	NE	
PostalCode	Org Postal Code		
Country	Org Country		
County	Org County		
Phone	Org Phone	(303) 221-3155	
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	TRUE	
crCategory	Org Category (code value)	Cat2	
crSource	Org Source (code value)	Source1	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
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	
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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
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	
DepartmentName	Org Department Name	Sales	
ContactName	Org Contact Name	Bundy, Al	
Contact	FirstName	<b>Contact First Name</b>	Al
Enter the field name, beginning with <b>Contact.</b> {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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
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	
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	

Object	Field Name	Field Description	Sample
Event	Subject	Event Subject text	This is the Subject
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		
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**.

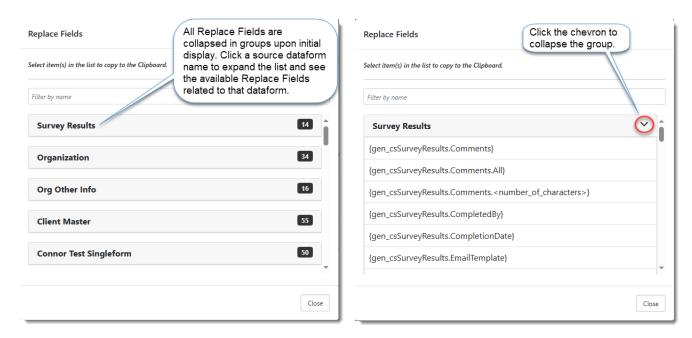
You can use replacement fields for Workflow Channel configuration and Email Templates.

## Field replacement includes

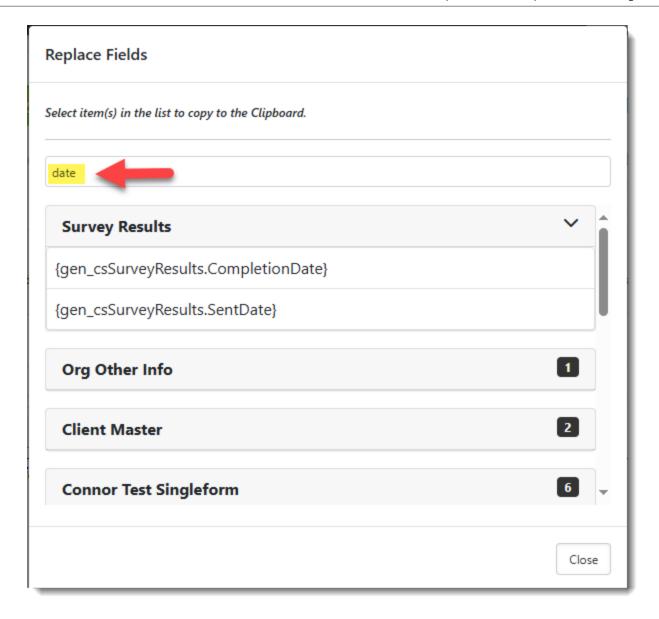
- Any active fields on the triggering dataform
- The active fields from any additional condition source dataform
- Task fields when you select **Task** as the Triggering Form on an Email Template
- The active fields from the tabbed forms related to the triggering form
- The active fields from the related 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**.
- 2. The Replace Fields dialog box opens, displaying fields grouped by source section and collapsed. The Replace Fields dialog box opens, displaying fields grouped by source section and collapsed. A field count is displayed for each group.
- 3. Expand and collapse fields as desired.



4. To search for fields, in the **Filter by name** box, start typing your keyword. As you type, the matching fields display for any groups you have expanded. Collapsed groups remain collapsed but the count changes to reflect only the Replace Fields which meet the filter criteria. For example, type **date** and all entries containing *date* are either displayed in the expanded groups or reflected in the count of the collapsed groups.



5. Click the fields you want to select as Replace Fields (as many fields as applicable) and then click **Copy**.

The Clipboard dialog box opens with the selected fields.

**Note:** Performing multiple searches and selecting fields from each result set will not impact your selections. All selections are retained until you copy them to the clipboard.



- 6. Click Ok.
- 7. On the Email Template or Workflow Channel, click in the field (Subject, Body, or Text Area) where you want to insert the replacement fields.
- 8. Paste the copied fields (Ctrl+V).
- 9. 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.
- 10. Click Apply.

### Alternate values

The following fields provide alternate values.

Field	Value
Contact	<ul> <li>TableName.FieldName.FirstName (blank if empty) example Client Master.PrimaryContact.FirstName</li> <li>TableName.FieldName.LastName</li> <li>TableName.FieldName returns LastName, FirstName</li> </ul>

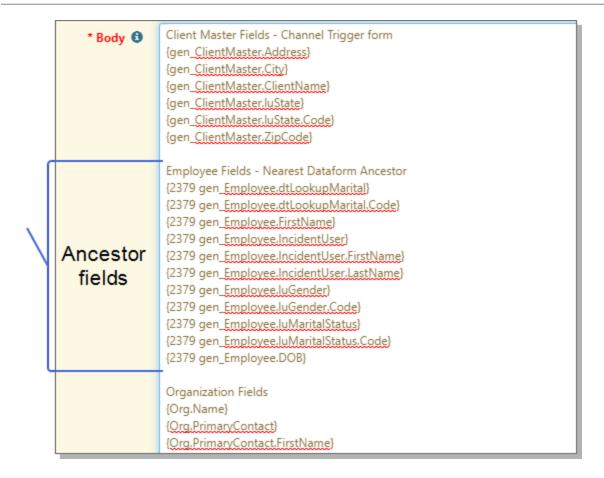
Field	Value
Users	<ul> <li>TableName.FieldName.FirstName example ClientMaster.SalesRep.FirstName</li> <li>TableName.FieldName.LastName</li> <li>TableName.FieldName returns LastName, FirstName</li> </ul>
Text area	<ul> <li>TableName.FieldName returns the first 250 characters (appends "" if the field contains more than 250 characters)</li> <li>TableName.FieldName.All returns entire field</li> <li>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.</integer></integer></integer></li> </ul>
Lookup	<ul> <li>TableName.FieldName returns Decode value displayed in the application</li> <li>TableName.FieldName.Code returns Code value stored in the field</li> </ul>
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.

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



View the video about Creating a Direct Deposit Notification.

## 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	Eguals	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:

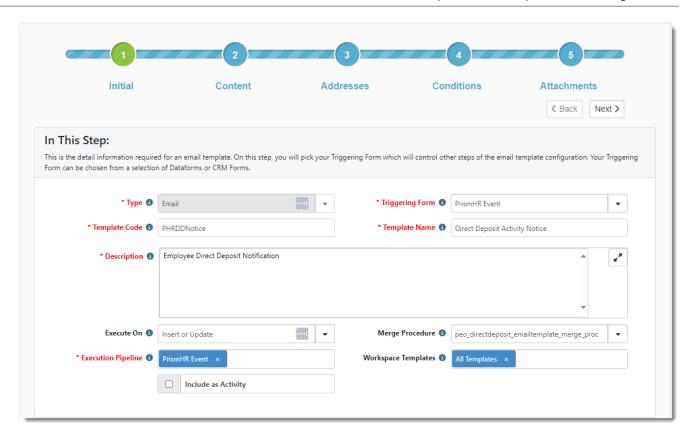
- Go to System Admin → > Email Templates.
   The Email Templates dashboard opens.
- Click Add.

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 <b>DDNotice</b> .
Template Name	Add a brief, but descriptive name to display in any list in ClientSpace where you may be able to select an Email Template. <b>EX: Direct Deposit Activity Notice</b>
Description	Include a brief description of the template, such as <b>Employee Direct Deposit Notification</b> .
Execute On	Select Insert or Update.
Merge Procedure	Select an optional Merge Procedure to provide additional system information for Field Replacement. For instance, if you want to merge information such as the employee's name at the top of the body of the email, you can select the <b>peo_directdeposit_emailtemplate_merge_proc</b> option. This adds additional merge replacement information for this email template in <b>Step 2 Content</b> .
	Alternatively, you can select <b>peo_directdeposit_emailtemplate_ recipient_v2_proc</b> which contains similar fields but also includes the following additional fields: <b>Previous Personal Email</b> and <b>Previous Work Email</b> .
Execution Pipeline	Indicates how the data enters ClientSpace. Remove the option for <b>Default</b> and select <b>PrismHR Event</b> .
Workspace Templates	Select the Workspace Templates that will receive this email. Default is <b>All Templates</b> .

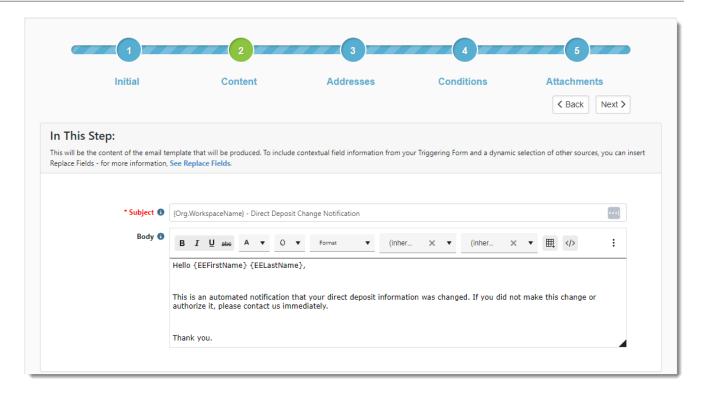
When you have finished configuring the **Step 1 Initial** tab, your screen should appear similar to the following:



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

Subject	The subject line of the email that is generated. The email recipients see this subject. <b>EX:</b> Direct Deposit Change Notification.
Body	The body of the email that is generated. This is seen by the email recipients. This field supports rich text. Therefore, you can customize fonts, add a logo, add a signature block, include links, and more. You can use replacement fields to customize the message.  To use replacement fields, click <b>See Replace Fields</b> . For details about
	using replacement fields, see Replacement Fields.  Note: Ensure that you have selected a Merge Procedure on the Step 1  Initial tab as outlined in the preceding step so that you can access the replacement fields.

When you have finished configuring the **Step 2 Content** tab, your screen should appear similar to the following:



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

Address Stored Procedure	Select <b>peo_directdeposit_emailtemplate_recipient_proc</b> for this email template. The <b>peo_directdeposit_emailtemplate_recipient_v2_proc</b> includes the Previous Personal Email and Previous Work Email.
Include Dataform Subscribers as 'CC' Recipients	<ul> <li>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 enabled (selected), this option presents a list to notify internal, external, or both recipient types:</li> <li>Internal: When the email template is triggered, only internal dataform subscribers are notified.</li> <li>External: When the email template is triggered, only external dataform subscribers are notified.</li> <li>Both: If you select Both or leave the field blank, all dataform subscribers are notified.</li> </ul>
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.

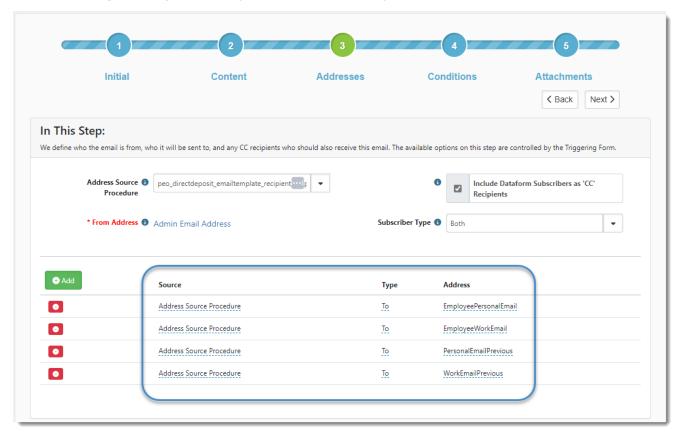
#### To change this setting:

- 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**.
- 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 <b>Address Source Procedure</b> . 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.
Туре	Type can be <b>To</b> or <b>CC</b> .

Address	You can select the employee's personal or work email address. This address triggers the employee notification when their direct deposit
	information changes.

When you have finished configuring the **Step 3 Addresses** tab, your screen should appear similar to the following (although some of your selections will vary from the examples shown here):



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

No Primary Trigger	Enable this option. (Select the option.)
Primary Trigger Field	Not used.
Only Trigger Once	Not used. This setting triggers the email template the first time the conditions are met. This setting is not for use with an ongoing notification email template such as the Direct Deposit Notifications email template.

Condition Expression	Allows for <b>AND</b> , <b>OR</b> , and <b>NOT</b> 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 1, 2, 3 and 4. Condition Expressions use
	AND/OR/NOT across tabbed dataform conditions. For a detailed explanation about conditions, see Condition expressions.

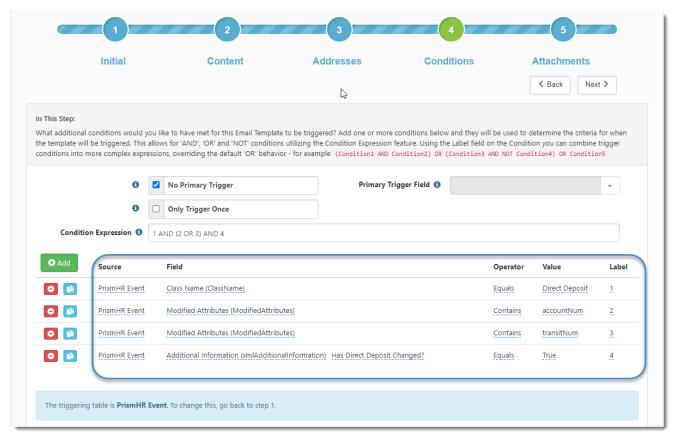
### 8. To configure conditions, click **Add**.

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 <b>PrismHR Event</b> .
Field	This is the field that is evaluated for the conditions. Select <b>Class Name</b> . This field captures the classification of event records that come through the API.
	<ul> <li>To add the condition Has Direct Deposit Changed: Select Additional Information (xmlAdditionalInformation) Has Direct Deposit Changed?</li> </ul>
	<ul> <li>To add the condition for who made the change: Select Additional Information (xmlAdditionalInformation) Username or User Type.</li> </ul>
Operator	The type of comparison between Field and Value. For the condition <b>Has Direct Deposit Changed?</b> or who made the change (i.e., <b>Username</b> or <b>User Type</b> ), select <b>Equals</b> .
Value	<ul> <li>The criteria against which Field is compared.</li> <li>For the condition Has Direct Deposit Changed, select <b>True</b>.</li> <li>For the condition who made the change (i.e., <b>Username</b> or <b>User Type</b>, enter a value such as Internal, External, or a username.</li> </ul>
Label	The label to be used when constructing Condition Expressions for triggering. Make this label short and representative of the selection in

**Field**. Labels are used in the **Condition Expression** field. You can also choose to use the default labels of C1, C2, C3, etc or shorten them to 1, 2, 3, and 4 as we've done in our example.

When you have finished configuring the **Step 4 Conditions** tab, your screen should appear similar to the following (although some of your selections will vary from the examples shown here):



- 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** (or the **Template Name** you entered on the **Step 1 Notice** tab.)
- 2. Click Publish.

The entry is now published.

#### If you would like to publish later:

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

### **Activity Tracking**

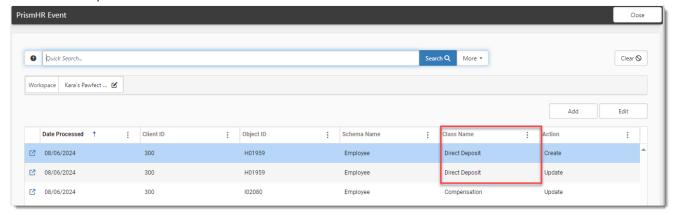
ClientSpace maintains a history of Direct Deposit Notification activity on the PrismHR Event dataform. This can help you prove that notification of a change to an employee's direct deposit information was sent if the receipt of a notification is disputed. To support Activity tracking of Direct Deposit Notifications, the following fields are set on the PrismHR Event dataform properties (**System Admin**):

- The **Enable Activities** checkbox is checked by default.
- The **Enable Attachments** checkbox is checked by default.

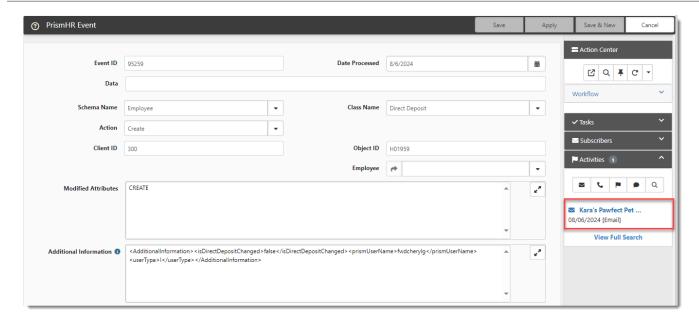
Additionally, the **Include as Activity** checkbox is checked by default on the Direct Deposit Active Notice email template (Template Code = PHRDDNOTICE).

**Note:** This template is predefined in ClientSpace. If you have custom Direct Deposit Notifications and you want Activity tracking on those as well, apply the same settings outlined here to those templates.

With these settings in place, when a direct deposit notification is triggered, an Email activity record (which includes an attachment of the generated email) is added to the PrismHR Event dataform in the correct workspace.

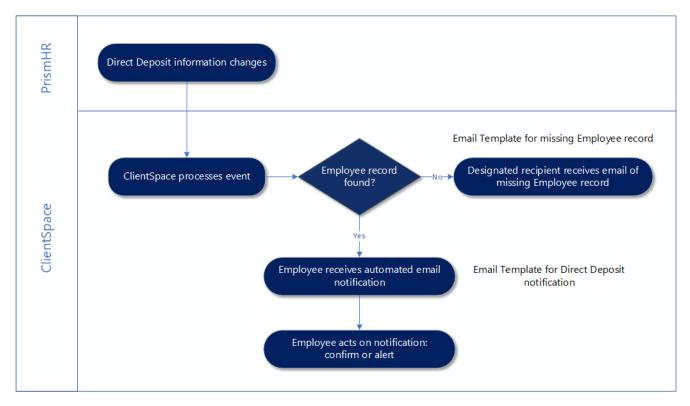


When you open the Prism HR Event record, the generated email is located in the Action Center under Activities.



# 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:

- Go to System Admin > Email Templates.
   The Email Templates dashboard opens.
- 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.
	<b>Note:</b> If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the <b>Enable Email for this account</b> field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.
	Note that only a Global Administrator can change this setting.
	Also see Personalizing Your User Profile.
Туре	Select <b>To</b> .
Address	Enter the email address for the designated recipient when no employee is identified. This is the person who will receive the notification.

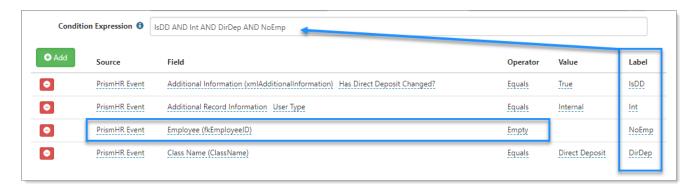
#### 8. Click Next.

The form for Step 4 Conditions opens.

9. Add a condition for Employee Empty.

Source	Select <b>PrismHR Event</b> .
Field	Select Employee (fkEmployeeID).
Operator	Select <b>Empty</b> .
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.

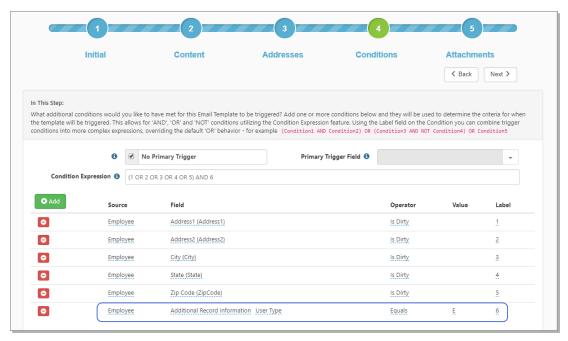
The new template is published and displayed in the Email Templates list.

## 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).





#### AdditionalInform

ation 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 pseudofield 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

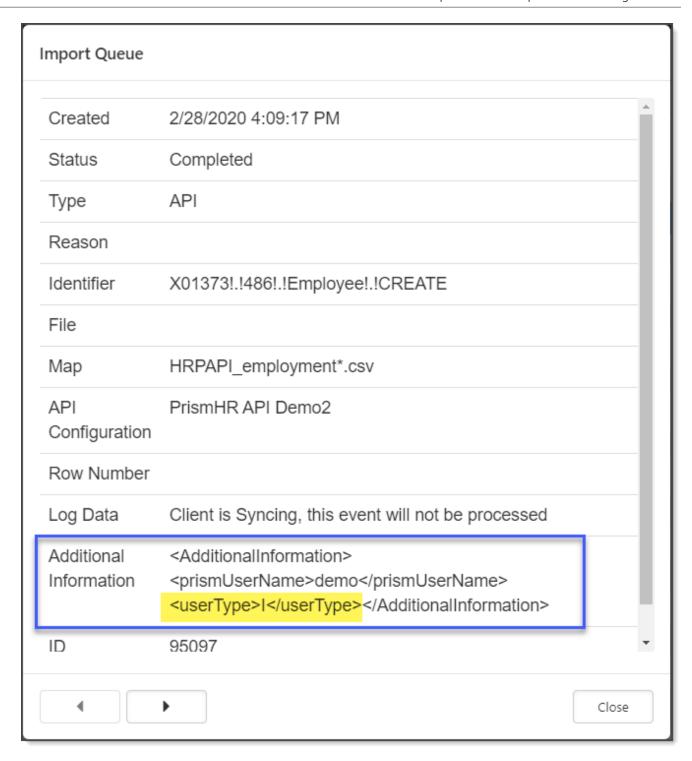
Additional Information data is only available as a trigger condition from the Triggering Form configured on a Workflow Channel or Email Template

#### To view the Import Queue:

- 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.



#### To use Additional Information in a Workflow or Email Template:

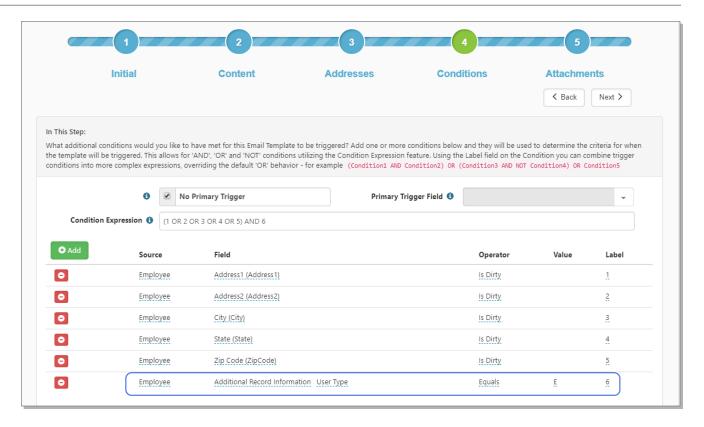
- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- 2. Select a Workflow Item that uses the Client Master as the Triggering Form and click **Details**.
- 3. Go to Step 4 Conditions.
- 4. Click **Add**.

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 <b>Equals</b> .
Value	<ul> <li>Enter a value:</li> <li>I = service provider</li> <li>E = employee</li> <li>A = worksite trusted adviser</li> <li>M = worksite manager</li> </ul>
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.

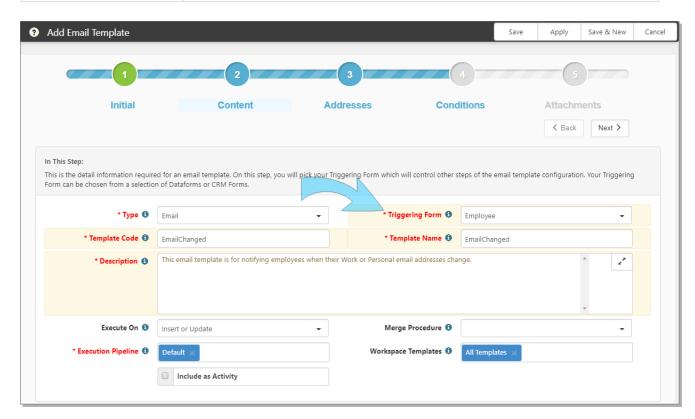
How does it work? When an Employee's Work Email and Personal Email changes occur in PrismHR, a business rule sets the Previous Email fields. The business rule (**SetPreviousEmails**) is set on the Employee dataform for when PersonalEmail or WorkEmail is changed. This rule stamps the old value into the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

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

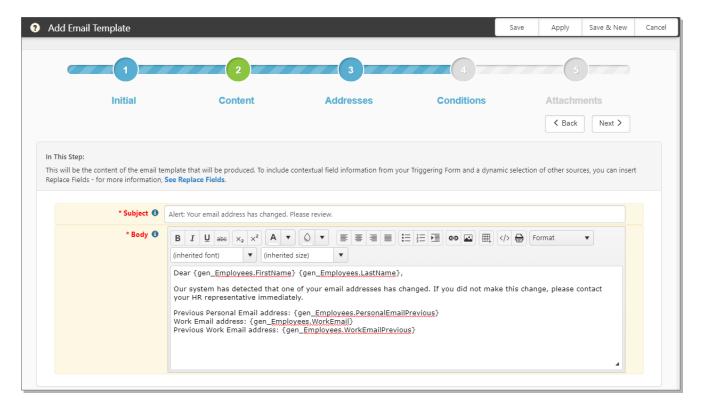
### 3. Complete **Step 1 Initial**.

Triggering Form	Select <b>Employee</b> . The Employee dataform is where the previous email addresses reside.
Template Code	Add a short descriptive code to identify this template, such as <b>EmailChanged</b> .
Template Name	Add a descriptive name (this is displayed in the application list), such as <b>Email address change notification</b> .
Description	Include a brief description, such as <b>Employee email address change notification</b> .
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 <b>All Templates</b> .



#### 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, <b>Alert: Your email address has changed</b> .
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 <b>See Replace Fields</b> . 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.

|--|--|

Procedure	
Include Dataform Subscribers as 'CC' Recipients	<ul> <li>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.</li> <li>Internal: When the email template is triggered, only internal dataform subscribers are notified.</li> <li>External: When the email template is triggered, only external dataform subscribers are notified.</li> <li>Both: If you select Both or leave the field blank, all dataform subscribers are notified.</li> </ul>
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:
	<ul> <li>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.</li> </ul>
	• 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.
	<b>Note:</b> If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the <b>Enable Email for this account</b> field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.

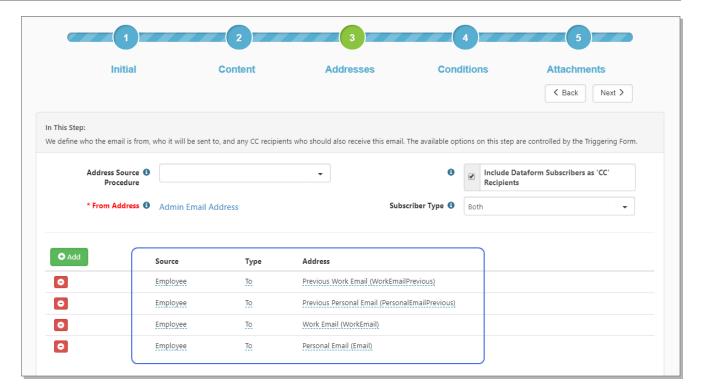
Note that only a Global Administrator can change this setting.

Also see Personalizing Your User Profile.

- **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**.
- 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

Source	For this email template, select <b>Employee</b> . 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.
Туре	Type can be <b>To</b> or <b>CC</b> .
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).

personal email addresses. See the example.



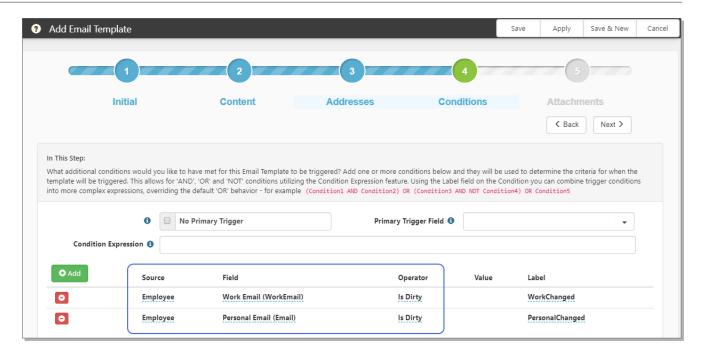
#### 7. Click **Next** and complete **Step 4 Conditions**.

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 <b>Employee</b> . 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 <b>Is Dirty</b> . 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

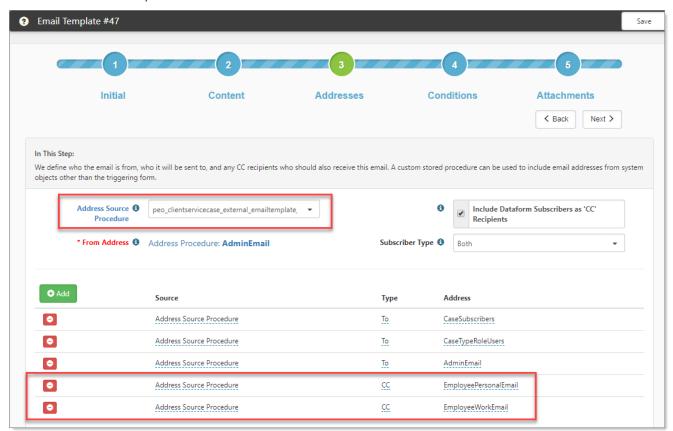
You can configure an email template to send an email to the related employee on a case. For example, you can send notifications to external employees who submit an inquiry through the Employee Portal Submit a Question.

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:

- 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 <b>Address Source Procedure</b> . 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 <b>Source</b> , then the external email addresses become available in <b>Address</b> .
Туре	Select <b>To</b> or <b>CC</b> .
Address	Select EmloyeePersonalEmail or EmployeeWorkEmail.

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

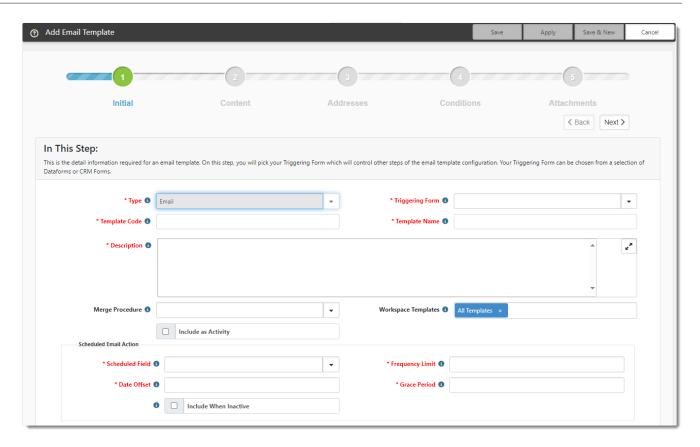
External employees should now be able to receive notifications from Client Service Cases.

# Configuring Scheduled Email Templates

You can schedule email templates to trigger on a specific date. This topic details how to schedule an email to trigger and be automatically sent to a recipient using the **Generate Scheduled Email Templates** scheduled process.

#### To configure scheduled email templates:

- Go to System Admin → > Email Templates.
   The Email Templates dashboard opens.
- 2. Click Add.
  - The Choose Email Template Type dialog opens with options to select **Real Time** or **Scheduled**.
- 3. When you select **Scheduled**, the Add Email Template wizard opens with Step 1: Initial. In this step, you configure the date that triggers the scheduled email template.



### 4. Configure the following options:

Туре	Type is a "read only" field for scheduled email templates. <b>Email</b> is selected by default for email notifications.
Triggering Form	Select the form that will trigger the email notification to be sent.
	To add a dataform that is not in the list:
	<ol> <li>In the <b>Triggering Form</b> field, go to the end of the list and select <b>Add Untriggered Form</b>.         The Select an Untriggered Form dialog box opens. Table Name contains a list of all dataforms currently not marked as Triggerable.     </li> <li>In <b>Table Name</b>, select a dataform from the list.</li> </ol>
	3. Click <b>Ok</b> . 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

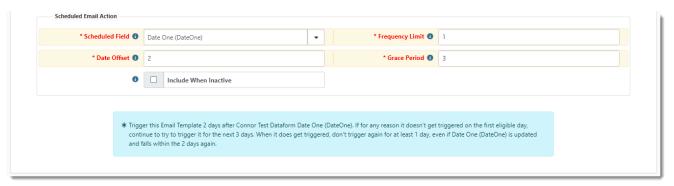
	template. <b>Note:</b> Global Admins can only edit codes that begin with CSCRPLY.
Template Name	Provide a short, descriptive name for your template. This displays in the email template list.
Description	Provide a useful description of the email template.
Merge Procedure	Select an optional Merge Procedure 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 <sup>1</sup> also determines the fields that are available to use in field replacement.
Workspace Templates	Select the Workspace Templates <sup>2</sup> to receive this email. By default, this field is set to All Templates.
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. By default, the option is cleared, meaning do not include the email as an activity. If you select this option and the email template includes an attachment, the system uploads any attachments to the activity when it is created.
Scheduled Email Action	on
Scheduled Field	This is the Date or Date/Time field (from the selected <b>Triggering Form</b> ) that ClientSpace will check to determine when to trigger the email. <b>Note:</b> ClientSpace only uses the Date portion of Date/Time fields to determine the trigger date.
Frequency Limit	The number you enter here limits the frequency that the email is sent.  The email is triggered once every X days based on the value in this field.  This way, even if a change is made to the date field used as the

<sup>&</sup>lt;sup>1</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

<sup>&</sup>lt;sup>2</sup>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.

	<b>Scheduled Field</b> which makes it eligible for triggering, the recipient will not receive additional emails until the set <b>Frequency Limit</b> has passed.
Date Offset	The number of days plus (+) or minus the (-) triggering date that the email template is triggered. For example, to trigger the email template 5 days before the Date or Date/Time specified in <b>Scheduled Field</b> , type -5 in <b>Date Offset</b> . To trigger the email template 5 days after the Date or Date/Time specified in <b>Scheduled Field</b> , type 5 in <b>Date Offset</b> .
Grace Period	This is the number of consecutive days you want the system to continue to try to trigger the email if, for some reason, the email could not be sent on the first eligible day.
Include When Inactive	When this field is unchecked, only Active triggering forms are checked when the scheduled email template is run.

5. After you have configured the Scheduled Email Action section, you receive a brief synopsis of the schedule.



6. Click **Next** to go to Step 2: Content.

#### Note:

- As you proceed with configuration through the various tabs of the Email Templates wizard, you may notice that **Current User** is not available as an option in Step 3: Addresses. This option only works with **Real Time** field analysis to determine the current user.
- You may also notice that the Is Dirty trigger operator is not available when setting conditions in Step 4: Conditions. This option only works with Real Time field analysis to determine if a field has changed. This kind of analysis cannot happen with a scheduled email template; therefore, the Is Dirty qualifier is not available when adding additional triggering conditions to scheduled email templates.
- Once you complete and save the scheduled email template, the configured conditions in the Scheduled Email Action section of Step 1: Initial are evaluated by a scheduled process named

**Generate Scheduled Email Templates** to determine if the date or date/time field combined with the other email template schedule options and any additional conditions added in Step 4: Conditions are met. If they are met, the email template will trigger at the set time.

### **Related Topics:**

- Step 2: Content
- Step 3: Addresses
- Step 4: Conditions
- Step 5: Attachments
- Scheduled Processes

# 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 Employee Termination Workflow Channel – Workflow Trigger: Case Type – **EE Term** | Status - **New** you begin, it is a recommended best practice to diagram the workflow. Task Assigned: Payroll Rep Task Assigned: Benefits Rep Flowcharts can Task Type: Benefits Check Task Type: **EE Termination** Terminate EE in Payroll System Terminate Benefits if necessary be very helpful in the design process, as long as you ensure EE Benefits? End that you include the starting point, ending point, steps in between, and the Task Assigned: Benefit Manager trigger Task Type: EE Election Notice Task Assigned: Benefit Manager conditions that Notify EE of COBRA rights Task Type: Notify Carrier Send Package to EE Notify carrier of EE benefits term lead from one Due Date=Term Date + 14 days step to another. While the example diagram is simplistic, it Trigger: Task Status=Complete demonstrates the Clone COBRA dataform EE set to EE of originating case power of Effective Date set based on complete date of task 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<sup>1</sup>. If so, you need to determine which fields on the cloneable form will be available for configuration by the system.

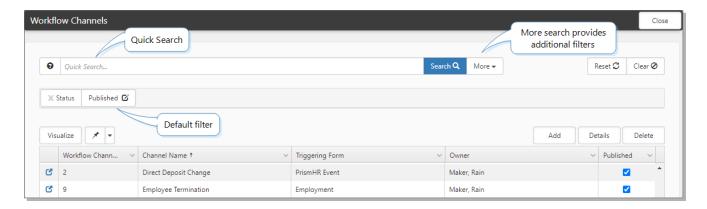
#### To add fields for dataform cloning:

- 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

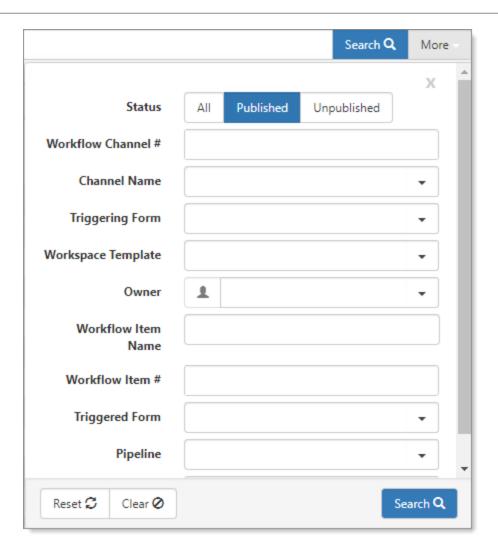
It is helpful to search the workflow list to find specific items and also to avoid configuring redundant workflows. From the Workflow Channels list, use the Quick Search and More search options to filter the list.

<sup>&</sup>lt;sup>1</sup>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:

- 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 Channel

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



#### 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.

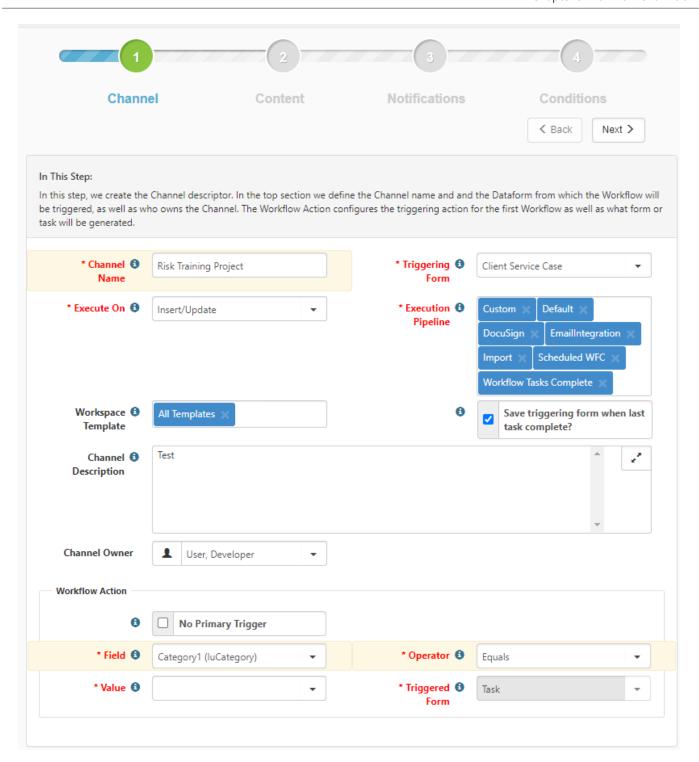
You are presented with a five-step process wizard: Channel, Content, Notifications, Conditions, and Attachments.

- 1. Step 1: Channel
- 2. Step 2: Content
- 3. Step 3: Notifications
- 4. Step 4: Conditions
- 5. Step 5: Attachments

### 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.

Channel Name	Provide a unique Channel Name. This should be descriptive and short.
Triggering Form	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:
	<ol> <li>In Triggering Form, go to the end of the list and select Add Untriggered Form.         The Select an Untriggered Form dialog opens.     </li> <li>In Table Name, select a dataform from the list.</li> <li>Click Ok.         The selected dataform is marked as triggerable and now appears in the Table Name list.     </li> </ol>
Execute On	<ul> <li>Insert: Item will be triggered only on the creation of a record.</li> <li>Update: Item will be triggered on a save of an existing record.</li> <li>Insert/Update: Or both?</li> </ul>
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.  Note: If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new workflow channel, pipelines assigned a behavior of Default will auto-fill the Execution Pipeline field. If you are editing an existing workflow channel, Execution Pipeline entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to

	a behavior of Disallow, you will not be able to add it again.
	See Configuring Pipeline Linking.
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.
Save triggering form when last task complete?	This field indicates whether the system will trigger business rules that use the Workflow Tasks Complete pipeline when the final task in the workflow chain is complete. When selected, this field indicates that the system will trigger business rules when completing the final task in the workflow chain. When not selected, the system does not trigger the business rules when the final task in the workflow chain is complete.
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 workflow.
No Primary Trigger	When selected, this field 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:
	<ol> <li>In Trigger Field, go to the end of the list and select Add Untriggered Field.</li> </ol>
	The Select an Untriggered Field dialog opens. <b>Field</b> contains a list of fields currently not marked as Triggerable.
	2. In <b>Field</b> , select an entry

	3. Click <b>Ok</b> .  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 Content.
	If the Triggered Form field is set to <b>Task</b> , you must select a form in the <b>Attach To</b> field.
	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 select the <b>Enable WFC Cloning</b> option.

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

## Step 2: Content

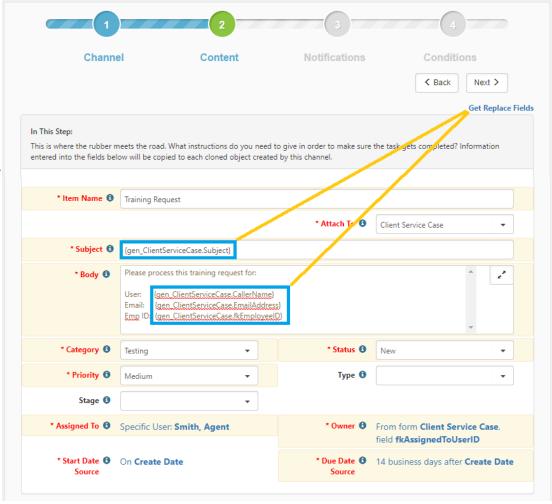
This is where the rubber meets the road. Information entered into these fields is copied to each cloned object created by this step. On the Content step, you can set user fields to values that exist on dataforms across a tabbed set. For more details about selecting users across tabbed dataforms, see Workflows 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
- Triggering task
- Server data procs
- Any associated tabbed dataforms
- Related
   Organization
   and Org



Other In	fo
----------	----

• Closest dataform ancestor

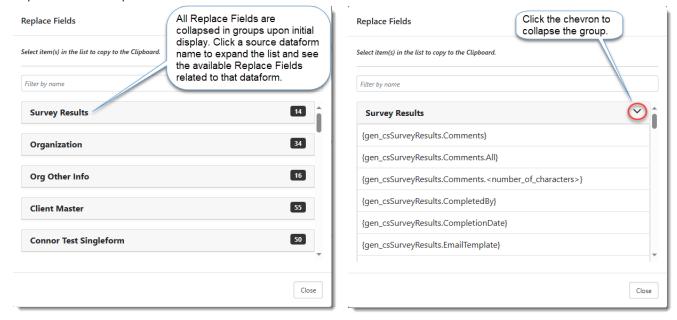
# To use Get Replace Fields:

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

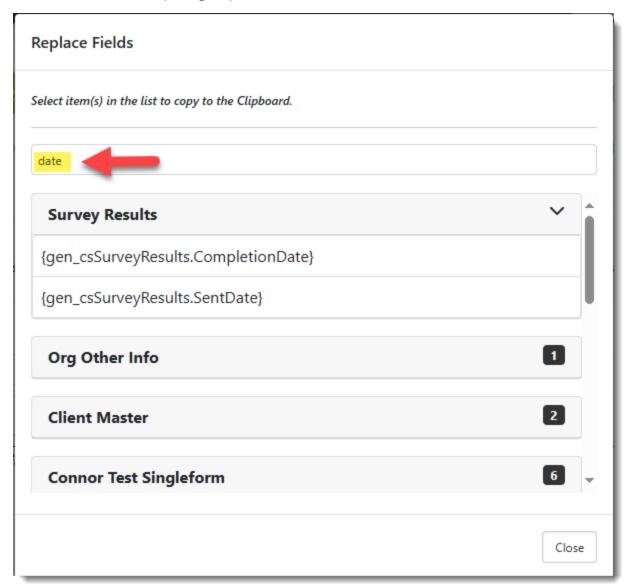
### To use replacement fields:

- 1. For *Email Templates*, in the **Content** step, click **See Replace Fields**. For *Workflow Channels*, in the **Content** step, click **Get Replace Fields**.
- 2. The Replace Fields dialog box opens, displaying fields grouped by source section and collapsed. The Replace Fields dialog box opens, displaying fields grouped by source section and collapsed. A field count is displayed for each group.
- 3. Expand and collapse fields as desired.



4. To search for fields, in the **Filter by name** box, start typing your keyword. As you type, the matching fields display for any groups you have expanded. Collapsed groups remain collapsed but the count changes to reflect only the Replace Fields which meet the filter criteria. For example,

type **date** and all entries containing *date* are either displayed in the expanded groups or reflected in the count of the collapsed groups.



5. Click the fields you want to select as Replace Fields (as many fields as applicable) and then click **Copy**.

The Clipboard dialog box opens with the selected fields.

**Note:** Performing multiple searches and selecting fields from each result set will not impact your selections. All selections are retained until you copy them to the clipboard.

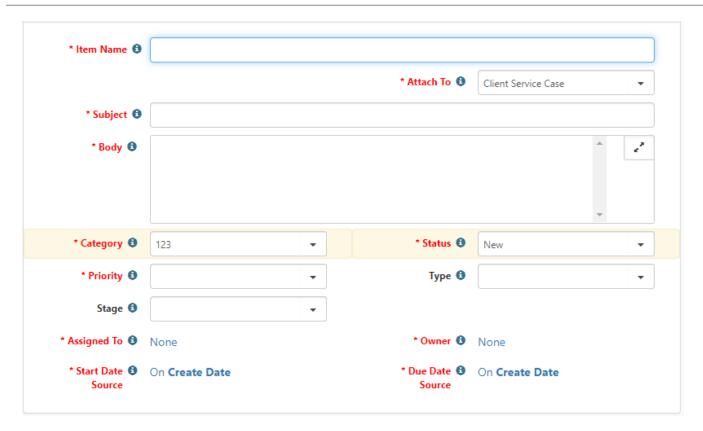


- 6. Click Ok.
- 7. On the Email Template or Workflow Channel, click in the field (Subject, Body, or Text Area) where you want to insert the replacement fields.
- 8. Paste the copied fields (**Ctrl+V**).
- 9. You can move the fields around as appropriate (copy and paste). You can invoke the Replace Fields dialog as often as necessary to paste your required fields.
- 10. 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.
IsMarkedForDelet ion	When this option is selected, the Workflow 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.
Attach To	This field is available only when a user selects <b>Task</b> in the <b>Triggered Form</b> field. This field indicates the form that the task will be assigned to. Select <b>This Form</b> to indicate that the form that triggered the workflow will be the form to which the task is attached.
	<b>Note:</b> If a form selected in the <b>Attached To</b> field is inactivated or removed from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering form.
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. See Field Replacement.
Category	Choose the appropriate Task Category.
Status	Select the appropriate Task Status.
Priority	What is the criticality of this task?
Туре	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.
	To change Assigned To and Owner:
	<ol> <li>Select Current User.</li> <li>The Assigned To or Owner Options dialog box opens.</li> </ol>
	2. Select an option:
	<ul> <li>Current User: The logged in user who triggers the task.</li> </ul>
	<ul> <li>Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.</li> </ul>
	<ul> <li>From a Field on a Form: Any user field on the triggering dataform is available.</li> </ul>
	<ul> <li>When you select From a Field on a Form, <b>Dataform</b> is enabled.</li> </ul>
	<ul> <li>Select the Dataform that has a field from which to select a User. Field becomes available.</li> </ul>
	<ul> <li>Select a user field.</li> </ul>
	3. Click Ok.
	You are returned to the Add Workflow form.
	For details about referencing users from tabbed dataforms (parent and child dataforms), see Workflows and Tabbed Dataforms.
Start Date Source,	Date Source options are Create Date, Specific Date, and From a Field on a

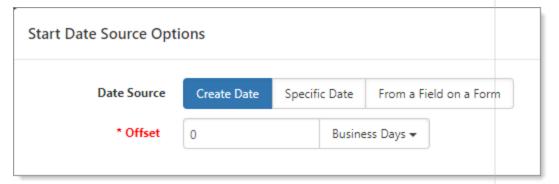
#### Due Date Source

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. For Date/Time fields you have an additional option to set Minutes.

**Due Date Source**: Tasks created by this workflow 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.



For date or date/time 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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.
- 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, business hours, end of month, beginning of year, or end of yearFor Date/Time fields you have an additional option to hours and minutes.

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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.
- 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 Add Workflow 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).

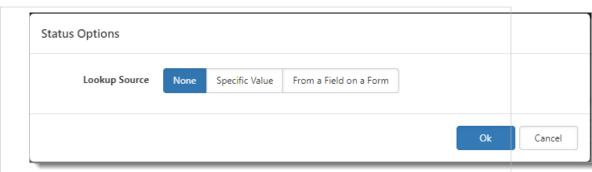
## Lookup and Multi-Lookup fields

Lookup and Multi-Lookup field names vary by dataform. To display as an available field on a workflow item, a Lookup or Multi-Lookup field must be set as a workflow cloneable field.

**Note:** Multi-Lookup fields work the same as a regular Lookups except that users can pick more than one selection from the list of available options.

#### To configure a lookup field:

Click next to a Lookup or Multi-Lookup field.
 The Status Options dialog box opens.



## 2. Select an option:

- None: This is the default initial state. When the workflow item triggers, any Lookup or Multi-Lookup field set to None will be blank on the new or updated task. The only exception is when the field is a required field (designated by red text). You must set a value for required fields.
- **Specific Value:** When the workflow item triggers, the Lookup field value or Multi-Lookup field value(s) that you select will be set in the corresponding field on the new or updated task.
- From a Field on a Form: When the workflow item triggers, the set value(s) from the Lookup field or Multi-Lookup field on the form you select auto-fills the corresponding field on the new or updated task. The From a Field on a Form option is only available when there are Lookup or Multi-Lookup fields on other forms in the same workspace that have the same Lookup Group.

**Note:** Tabbed form Lookup and Multi-Lookup fields have the following naming convention to help you determine where the field you are selecting is located: \*<Dataform Tab Name> -- <Field Label> (FieldName).

See the example image below showing two Lookup fields in the **Field** selection. The first field in the Lookup is located on the home form (i.e., parent form). The second field is located on a tabbed extension of the parent form (or child form) and uses the aforementioned naming convention.



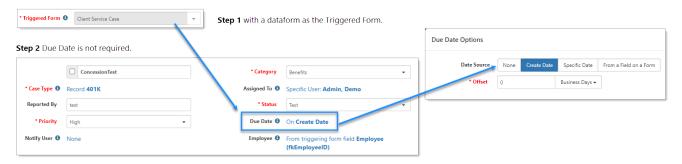
See the example image below showing two Multi-Lookup fields in the **Field** selection. Just as with the example above of a regular Lookup field,



## **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.

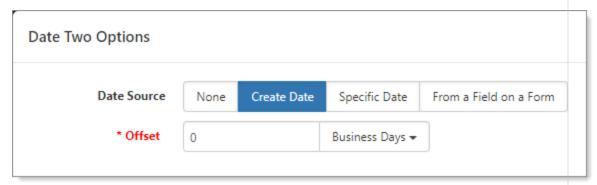
Additionally, date fields can vary. Some dataforms may have Date One and Date Two, and others may have Due Date. On Step 1, when the Triggered Form is a dataform, and the date field is not required, you have the option to set the On Create Date to None.



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,	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.
Due	To configure a date field:
Date	1. Select <b>On Create Date</b> .

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**.

Looku Lookup and Multi-Lookup field names vary by dataform. To display as an available field

p and Multi-Looku on a workflow item, a Lookup or Multi-Lookup field must be set as a workflow cloneable field.

p fields **Note:** Multi-Lookup fields work the same as a regular Lookups except that users can pick more than one selection from the list of available options.

## To configure a lookup field:

Click next to a Lookup or Multi-Lookup field.
 The Status Options dialog box opens.



### 2. Select an option:

- None: This is the default initial state. When the workflow item triggers, any
  Lookup or Multi-Lookup field set to None will be blank on the new or
  updated dataform. The only exception is when the field is a required field
  (designated by red text). You must set a value for required fields.
- **Specific Value:** When the workflow item triggers, the Lookup field value or Multi-Lookup field value(s) that you select will be set in the corresponding field on the new or updated dataform.
- From a Field on a Form: When the workflow item triggers, the set value(s) from the Lookup field or Multi-Lookup field on the form you select auto-fills the corresponding field on the new or updated dataform. The From a Field on a Form option is only available when there are Lookup or Multi-Lookup fields on other forms in the same workspace that have the same Lookup Group.

**Note:** Tabbed form Lookup and Multi-Lookup fields have the following naming convention to help you determine where the field you are selecting is located: \*< Dataform Tab Name> -- < Field Label> (FieldName).

See the example image below showing two Lookup fields in the **Field** selection. The first field in the Lookup is located on the home form (i.e., parent form). The second

field is located on a tabbed extension of the parent form (or child form) and uses the aforementioned naming convention.



See the example image below showing two Multi-Lookup fields in the **Field** selection. Just as with the example above of a regular Lookup field, the parent form field and child form field are easily distinguishable.



3. When ready, click **Ok**.

## Nume ric

To display as an available field on a workflow item, a numeric fields must be set as a workflow cloneable field.

Fields

**Note:** Numeric datatype fields are defined in ClientSpace with a field properties **Element Type** of Integer, Decimal, Money, or Percent.

#### To configure a numeric field:

Click next to a numeric field.
 The Options dialog box opens.



#### 2. Select an option:

- **None:** This is the default initial selection. When the workflow item triggers, any numeric field set to None will be blank on the new dataform. The only exception is when the field is a required field (designated by red text). You must set a value for required fields.
- **Specific Value:** When the workflow item triggers, the numeric field value you enter will be set in the corresponding field on the new dataform.
- From a Field on a Form: Select a source Dataform and a source Field from

the selected dataform. When the workflow item triggers, the set value from the numeric field on the source dataform auto-fills the corresponding field on the new dataform.

- The From a Field on a Form option is only available when there are numeric fields of the same datatype on other single forms in the same workspace.
- The fields available for selection in the Field drop down list are filtered by datatype. They must have the same datatype as the triggering form field. Example: If the field on the triggering form is a Decimal datatype, numeric fields from the source dataform with a Decimal datatype display in the list of available source fields.
- Numeric datatype source fields come from single forms only with one exception: Numeric datatype fields from a multi-form only display if it is the triggering form.
- Tabbed form numeric fields have the following naming convention to help you determine where the field you are selecting is located: \*<Dataform Tab Name> -- <Field Label>(FieldName). See an example below:



- When the workflow is triggered, the system evaluates and respects any **Minimum** and **Maximum** values set in the field properties. Any value not within the set range will not be applied.
- 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.

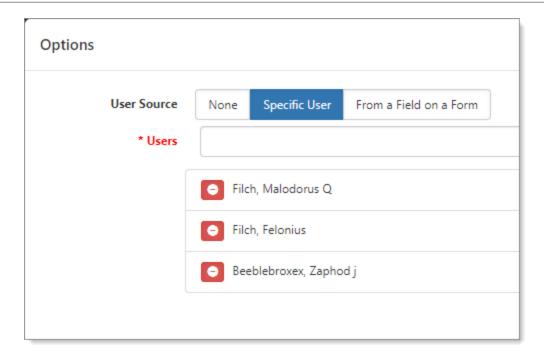


#### To add notifications:

- 1. To notify the current user (the triggering user), select **Notify Current User**.
- 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.

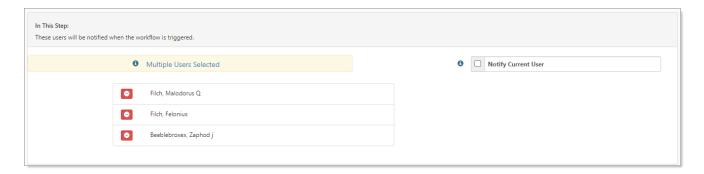


For From a Field on a Form, you have additional choices — from which Dataform and then which Field. The Dataform selection drives the items in Field. From a Field on a Form allows you to select users across tabbed dataforms. For more details about selecting users across tabbed dataforms, see Workflows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



3. When ready, click **Ok**.

The notification list displays the users that are to receive the notification.



## To remove users from the notifications list:

- 4. Click (Remove).
- 5. When you are ready to move to Conditions, click **Next**. Step 4: Conditions opens.

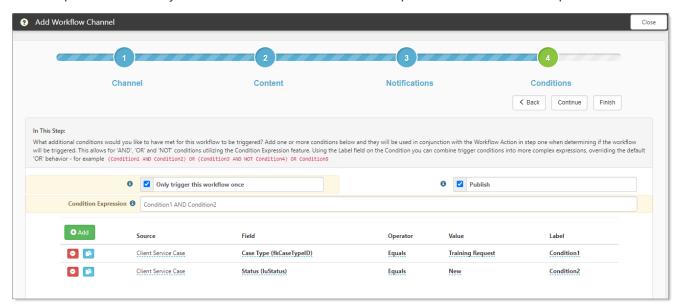
## Step 4: Conditions

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 the procedure later in this topic.

**Clone a trigger**: For triggers that are similar, use the Clone feature to copy a trigger condition. See the procedure later in this topic.

**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 the procedure later in this topic.



## **To configure Conditions:**

1. Complete the form:

Only trigger this	Sometimes you only want a workflow to happen once. For example, the	
workflow once	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 readonly. 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. The Workflow Action condition was set in Step 1. This is the dataform or Condition Expression 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. You can also add triggering conditions based on a Value comparison. The comparison Value can be a manually typed, static value or a field value located on the same dataform or a different single dataform. (If you are selecting the same dataform, it can be a either be a single dataform or a multi-form. If you are selecting a different dataform, it must be a single dataform.) 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 Condition 2 OR Condition 3. • 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	The <b>Source</b> list includes the triggering form and its tabs, the channel trigger (i.e., the original form that started the channel), all triggerable, active single-forms, and the tabs of those single-forms. Applicable server data procs, if configured, and other workflow items, such as a HdrAction, may also be included.
	Note:
	<ul> <li>HdrAction is only available when the Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.</li> </ul>
	<ul> <li>Condition Expressions operators (AND, OR, and NOT) work across multiple dataforms.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>The Add Untriggered functionality option is available when adding fields from this source. If you select an untriggered field, ClientSpace will set the field to triggerable in the field settings.</li> </ul>
	<ul> <li>If the dataform is the main triggering dataform for the workflow, the condition Source is Channel Trigger: <nameoftriggeringform>.</nameoftriggeringform></li> </ul>
	<ul> <li>If the dataform is a cloned dataform workflow item, the condition Source is Workflow #<itemnumber>: <itemname>.</itemname></itemnumber></li> </ul>
	For additional details about tabbed dataforms, see Workflows and Tabbed Dataforms.
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 ( <b>Multi Lookup</b> ( <b>MultiLookup</b> )) as triggering conditions.
	A dataform <b>Active</b> field can even be used to trigger a task or form. (If you are building a dataform condition using the <b>Active</b> field, the <b>Source</b> must be the Triggering Form.) Workflow conditions can be built based on a specific <b>Active</b> field value (i.e., Checked or Unchecked) or whether the <b>Active</b> field was changed from its current value (i.e., IsDirty):
	Active field was changed from its current value (i.e., isDirty):

- **Field** = Active, **Operator** = Equals, **Value** = Checked or Unchecked.
- **Field** = Active, **Operator** = IsDirty.

However, keep in mind that when you add a new record (such as a Client Service Case record), behind-the-scenes the system is applying a default **Active** status to the record which places the **Active** field in an edit or "IsDirty" status upon "Add". If you do not want a workflow condition that uses the **Active** field as a trigger condition to trigger on the initial "Add" of a record, be certain to change the **Execute On** field value (located on the Step 1: Triggering page of the Workflow Items wizard) to **Update**.



#### See Step 1: Triggering.

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:

- 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 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	A label is used when combining conditions into a complex Condition Expression. ClientSpace assigns a label to a new condition with the naming convention C#. For example, C1 for the first condition that you create, C2 for the second, and so on. You can change the label name by selecting the name of the label and typing a new name for the label. For example, you can select the C1 label and enter Condition1 as the new label name.  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 minutes/hours/days/months/years from a date:

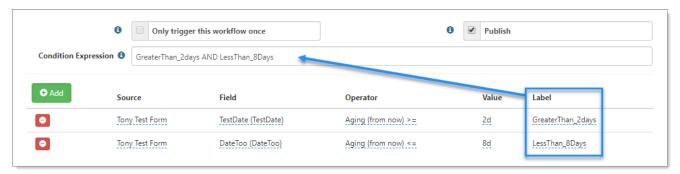
## 3. Complete the form fields:

Field	Select a <b>Date</b> or <b>Date Time</b> datatype field. This action makes the Aging operators available in <b>Operator</b> . <b>Note:</b> When comparing <b>Date</b> to <b>Date Time</b> datatypes (or vice versa) 12:00:00AM is used as the comparison time for the <b>Date</b> datatype.
Operator	<ul> <li>Aging (from now) &gt; = <ul> <li>Greater than or equal to the number of days/months/years in Value.</li> </ul> </li> <li>Aging (from now) &lt; = <ul> <li>Less than or equal to the number of days/months/years in Value.</li> </ul> </li> <li>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.</li> </ul>
Value	<ul> <li>Type a number accompanied by:</li> <li>mm: for minutes (Only works with Date Time fields)</li> <li>h: for hours (Only works with Date Time fields)</li> </ul>

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.

#### What's next?

You can optionally add attachments or publish the workflow without adding attachments. See Step 5: Attachments and 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.

Туре	Description	Label
FieldValueExpression	gen_Property.OwnerOccupied Equals Yes	00
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
<ul> <li>The first grouping has two sets of parentheses:</li> <li>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.</li> </ul>	(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 <b>(GA OR AL)</b> )
Second group - the OR	
<ul> <li>The second grouping has two sets of parentheses:</li> <li>The first group is SECenv. You need a set of parentheses for this major group.</li> </ul>	(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



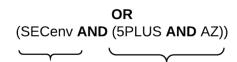
1. Must be owner occupied

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.



1. Must have at least view rights

Must have at least 5 stories
 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

You can optionally add attachments to a workflow. The attachments are added to the triggered form when the workflow is executed. You can add two kinds of attachments:

- **File upload field attachment:** Select a file upload field from a form. The form can be a single form located in the workspace where you are building the workflow OR a multiform if it is the triggering form.
- **Static attachment:** A static attachment is an attachment not associated with a dataform. Once you click **Apply** or **Save** on a new workflow, an Attachments panel displays. You can browse to any file on your computer and upload it to the workflow. When the workflow executes, it is added to the triggered form along with any file attachments.
- Attachment link: You can also add a link to a site on a triggered form from the workflow Attachments panel. When the workflow executes, it is added to the triggered form along with any file attachments.

Also see Putting It All Together: Workflow Attachments.

#### To add an attachment:

- 1. Click Add.
- 2. To add file upload field attachments, complete the form:

Dataform	Select the dataform where the file upload field containing the attachment is located. The listed forms are single forms only with exception of the triggering form. If it is a multiform and not a single form, it is also included in the list.
Field	Select the field upload field containing the attachment you want to add to the triggered form.
	<b>Note:</b> If the field is blank when the workflow is executed, no workflow attachment will be added to the triggered form.

- 3. Repeat step 2 above until all desired file upload field attachments are added.
- Click Apply or Save.
   If this is a new workflow, the Attachments panel displays.
- 5. Optionally, you can add a static attachment that is not associated with a dataform from the **Attachments** panel.
  - Follow these steps to add a file attachment:

- a. Click the **Attachments** panel.
- b. On the **Attachments t**ab, click **Add** + to upload a new file. The Upload File window displays.
- c. Click **Choose File**.
- d. Locate the file on your computer and click **Open**.
   The file name displays in the **File** field of the Upload File window.
- e. Optionally, you can provide **Description**, **Category**, and **Tags** information
- f. Click **Save** on the Upload File window.

  The Upload File window closes and the attachment file you just added is listed on the Attachments panel. You can click the file name or click (**Edit**) next to the attachment file name to view your file.

**Note:** You can discard an uploaded file by clicking (**Remove**) next to the attachment file name.

6. Optionally, you can add an attachment link to a site on the triggered form from the **Attachments** panel.

Follow these steps to add a link attachment:

- a. Click the **Attachments** panel.
- b. Click the Links 

   tab, click Add 

   to add a link.

   The Link File window displays.
- c. Type the URL in the **Link** field.
- d. Optionally, type a link description in the **Description** field.
- e. Click **Save** on the Link File window.

  The Link File window closes and the link you just added is listed on the **Links** tab of the Attachments panel. You can click the link name or click **(Edit)** next to the link to test the link.

**Note:** You can discard a link by clicking 👅 (**Remove**) next to the link name.

## **Completing the Configuration**

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

## To complete the configuration, when ready, you can click Back, Continue, or Finish:

- 1. Click **Back** to return to the previous step of the Workflow item.
- 2. 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.

**Note:** Alternatively, you can click **Continue Workflow from Here** in the Dependent Workflow panel to add a dependent workflow.

- 3. 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.

### Putting It All Together: Workflow Attachments

- When the workflow executes, any workflow attachments (file upload field attachments, static file
  attachments, and attachment links) are added to the **Workflow Attachments** panel located in
  the **Action Center** of the triggered form. See the Workflow Attachments section of Workflow
  Channel Action Items.
- Workflow Attachments links are links to the original URL.
- Workflow Attachments are links to the original source file as it existed when the workflow was
- If a source file is later updated after the workflow has been executed, the link to the version of the file at the time of workflow execution remains intact on the triggered form.
  - **Note:** If you no longer want that version of the file associated with the triggered form, you can delete it by clicking (**Remove**) next to the attachment file name in the **Workflow Attachments** panel of the triggered form.
- If a source file is deleted by a user, the file cleanup process bypasses deletion of the file if any **Workflow Attachments** panel file links to that file are found.

#### What's next?

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

## Learning how: Configuring Workflow Channels

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

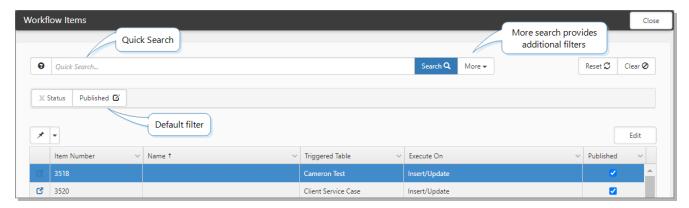
View the video Configuring Workflow Channels.

## Learning how: Advanced Workflow Configuration

View the video Advanced Workflow Configuration.

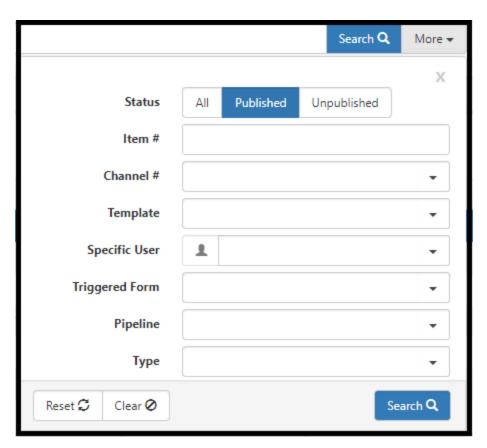
# Searching Workflow Items

It is helpful to search the workflow items to find specific items or items that share a characteristic (for example, the same pipeline). From the Workflow Items dashboard, use the Quick Search and More search options to filter the list.



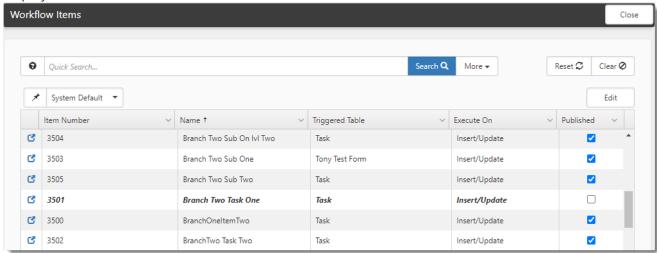
#### To search Workflow Items:

- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- Click Workflow Items.The Workflow Items dashboard opens.
- 3. In **Quick Search**, you can type text or numbers to find matching entries quickly. You can search for the Item Number and Triggered Form (starts with).
- 4. In **More** search, you can further refine the criteria by Item #, Channel #, Template, Specific User, 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.



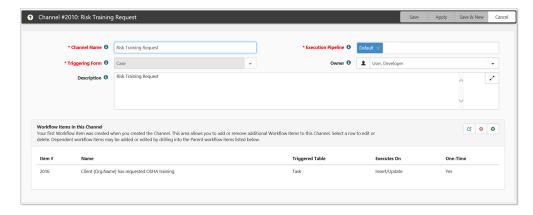
5. Select your criteria and click **Search**.

The system displays the filtered list. If the filtered list includes unpublished workflow items, they will display in italics and bold with the **Published** checkbox unchecked. Published workflow items display in normal text with the **Published** checkbox checked.



# Configuring Workflow Items

When you have completed the four-step process for creating a workflow channel, 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 a workflow channel and complete one of the following actions in the Workflow Items in this Channel section:

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

#### To configure a new workflow item:

- 1. From an open workflow channel, select €.
- Select Real Time or Scheduled.
   The Add Workflow form opens. The following topics follow the Real Time workflow. For information about scheduled workflows, see Configuring Scheduled Workflows.

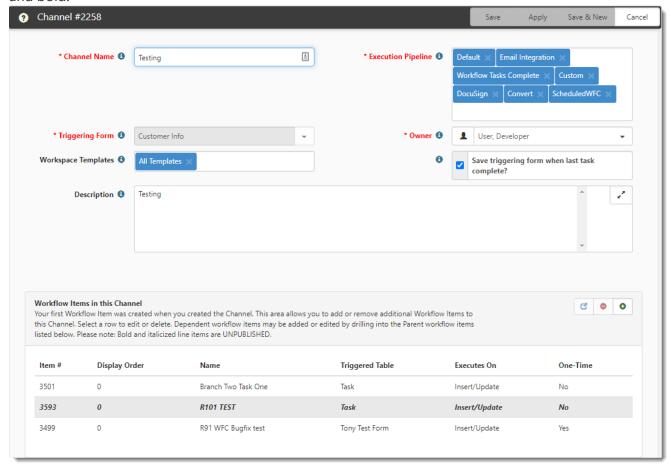
You are presented with a four-step process wizard: Triggering, Content, Notifications, and Conditions.

- 1. Step 1: Triggering
- 2. Step 2: Content
- 3. Step 3: Notifications
- 4. Step 4: Conditions
- 5. Step 5: Attachments

#### To publish or unpublish an existing workflow item:

- 1. From an open workflow channel, click the workflow item you want to publish or unpublish "Workflow Items in the Channel" section and select (Jump).
- 2. Click the Step 4: Conditions tab.
- 3. Place a check mark in the **Publish** checkbox to publish the workflow item or remove the check mark from the **Publish** checkbox to unpublish a workflow item.
- 4. Click Save.
- 5. Return to the main workflow channel page.
  Published workflow items display as normal text. Unpublished workflow items display in italics

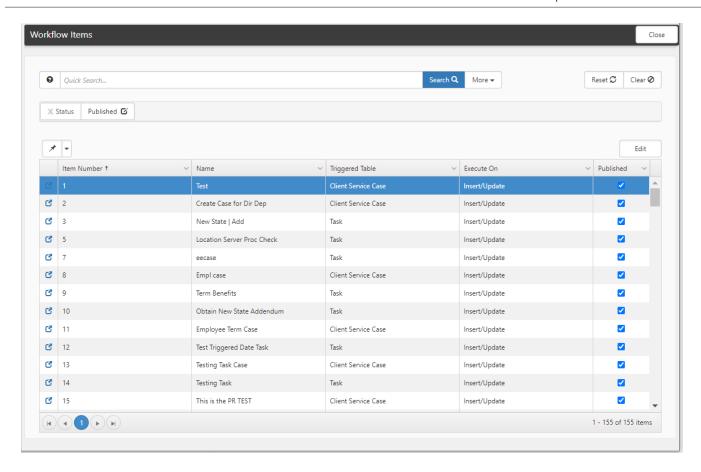
#### and bold.



# Workflow Items Dashboard

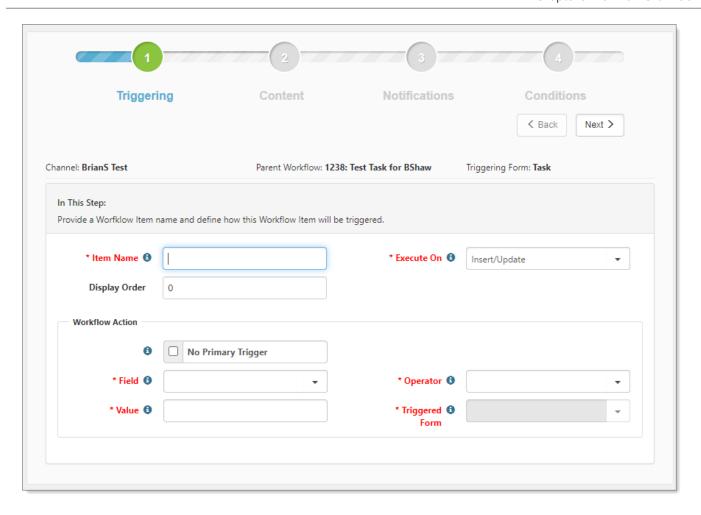
A global admin user can click the **Workflow Items** button on the Workflow Channels dashboard to access the Workflow Items dashboard. A global admin user can use the Workflow Items dashboard to find and then edit workflow items without drilling into each individual workflow channel. The Workflow Items dashboard provides an efficient mechanism for workflow item maintenance. For example, a global admin user can use the More search option to find all workflow items for a specific pipeline and apply edits to those workflow items. For more information, see workflow items or Searching Workflow Items.

The following graphic illustrates the **Workflow Items** dashboard.



# Step 1: Triggering

In this step create a Workflow Item name and define how this Workflow Item is triggered.



# To configure the triggering:

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

Channel Name	Provide a unique Channel Name. This should be descriptive and short.
Triggering Form	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:

	<ol> <li>In Triggering Form, go to the end of the list and select Add Untriggered Form.         The Select an Untriggered Form dialog opens.     </li> <li>In Table Name, select a dataform from the list.</li> <li>Click Ok.         The selected dataform is marked as triggerable and now appears in the Table Name list.     </li> </ol>
Item Name	Provide a short descriptive name for what this workflow object is.
Execute On	<ul> <li>Insert: Item will be triggered only on the creation of a record.</li> <li>Update: Item will be triggered on a save of an existing record.</li> <li>Insert/Update: Or both?</li> </ul>
Display Order	This allows the admin to add ordering information on the detail record of a workflow item that is then reflected in the order the workflow items appear in both the workflow item list and the visualizer. This does not affect the triggering of workflow items but is merely a visual reference to better allow admins to organize these lists.
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.
	<b>Note:</b> If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new workflow channel, pipelines assigned a behavior of Default will auto-fill the <b>Execution Pipeline</b> field. If you are editing an existing workflow channel, <b>Execution Pipeline</b> entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the <b>Execution Pipeline</b> list. If the same pipeline is assigned a behavior of Disallow, you will not be able to add it again.
	See Configuring Pipeline Linking.
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.
Save triggering form when last task complete?	This field indicates whether the system will trigger business rules that use the Workflow Tasks Complete pipeline when the final task in the workflow chain is complete. When selected, this field indicates that the system will trigger business rules when completing the final task in the workflow chain. When not selected, the system does not trigger the business rules when the final task in the workflow chain is complete.
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 workflow.
No Primary Trigger	When selected, this field 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:
	<ol> <li>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.     </li> <li>In Field, select an entry</li> </ol>
	3. Click <b>Ok</b> .  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 Content.
	If the Triggered Form field is set to <b>Task</b> , you must select a form in the <b>Attach To</b> field.
	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 select the <b>Enable WFC Cloning</b> option.

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

# Step 2: Content

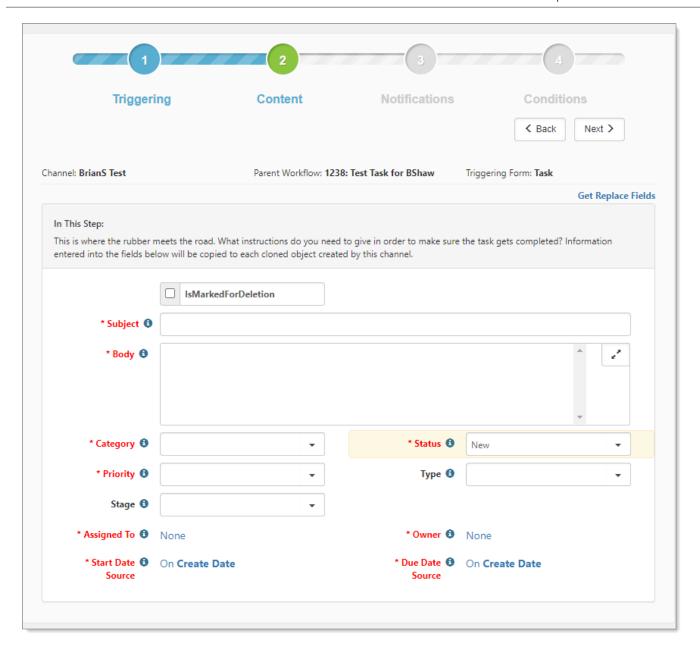
In this step this is where the rubber meets the road. Information entered into the fields below will be copied to each cloned object created by this item.

Field Replacement

To use Get Replace Fields:

**Triggered Form: Task** 

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



## To configure the content:

### 1. Complete the fields:

Item Name	Provide a short descriptive name for what this workflow object is.
IsMarkedForDelet	When this option is selected, the Workflow clones the task with this field
ion	selected. Then, when the scheduled process, Delete Marked Tasks, runs, it

Form to indicate that the form that triggered the workflow will be the form to which the task is attached.  Note: If a form selected in the Attached To field is inactivated or removed from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering form.  Subject Subject Line that displays on the task. This field supports field replacement. See Step 2: Content.  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. See Step 2: Content.  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.  To change Assigned To and Owner:  1. Select Current User.  The Assigned To or Owner Options dialog box opens.  2. 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.		
field. This field indicates the form that the task will be assigned to. Select This Form to indicate that the form that triggered the workflow will be the form to which the task is attached.  Note: If a form selected in the Attached To field is inactivated or removed from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering form.  Subject  Subject Line that displays on the task. This field supports field replacement. See Step 2: Content.  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. See Step 2: Content.  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?  For Assigned To, Owner  For Assigned To, select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User.  The Assigned To or Owner Options dialog box opens.  2. 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.		finds all the tasks with this field select, and deletes the task.
from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering form.  Subject Subject Line that displays on the task. This field supports field replacement. See Step 2: Content.  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. See Step 2: Content.  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.  To change Assigned To and Owner:  1. Select Current User.  The Assigned To or Owner Options dialog box opens.  2. 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.	Attach To	field. This field indicates the form that the task will be assigned to. Select <b>This Form</b> to indicate that the form that triggered the workflow will be the form to which the task is attached.
See Step 2: Content.  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. See Step 2: Content.  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?  For Assigned To, Owner  For Assigned To, select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens.  2. Select an option:  • Current User: The logged in user who triggers the task.  • Specific User, the User field is enabled. This displays all active user accounts.		from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering
contain information to provide steps to complete the task. This field supports field replacement. See Step 2: Content.  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?  For Assigned To, Owner  For Assigned To, select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens.  2. 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.	Subject	
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?  For Assigned To, Select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User.     The Assigned To or Owner Options dialog box opens.  2. 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.	Body	contain information to provide steps to complete the task. This field supports
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?  For Assigned To, Select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User.     The Assigned To or Owner Options dialog box opens.  2. 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.	Category	Choose the appropriate Task Category.
Type Within the category, what is the task type?  Stage Also called workflow. Where in the process does this task fall?  For Assigned To, Select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens. 2. 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.	Status	Select the appropriate Task Status.
Also called workflow. Where in the process does this task fall?  For Assigned To, Select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens. 2. 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.	Priority	What is the criticality of this task?
Assigned To, Owner  For Assigned To, select the person responsible for accomplishing this task from the following options. For Owner, select an owner.  To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens. 2. 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.	Туре	Within the category, what is the task type?
To change Assigned To and Owner:  1. Select Current User. The Assigned To or Owner Options dialog box opens. 2. 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.	Stage	Also called workflow. Where in the process does this task fall?
<ol> <li>Select Current User.         The Assigned To or Owner Options dialog box opens.     </li> <li>Select an option:         <ul> <li>Current User: The logged in user who triggers the task.</li> <li>Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.</li> </ul> </li> </ol>		
<ul> <li>The Assigned To or Owner Options dialog box opens.</li> <li>2. Select an option: <ul> <li>Current User: The logged in user who triggers the task.</li> <li>Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.</li> </ul> </li> </ul>		To change Assigned To and Owner:
<ul> <li>Current User: The logged in user who triggers the task.</li> <li>Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.</li> </ul>		
<ul> <li>Specific User: A specific user in the Workspace. When you select Specific User, the User field is enabled. This displays all active user accounts.</li> </ul>		2. Select an option:
Specific User, the User field is enabled. This displays all active user accounts.		<ul> <li>Current User: The logged in user who triggers the task.</li> </ul>
• From a Field on a Form: Any user field on the triggering		Specific User, the User field is enabled. This displays all active user
From a Field on a Form. Any user field on the triggering		<ul> <li>From a Field on a Form: Any user field on the triggering</li> </ul>

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.

#### 3. Click Ok.

You are returned to the Add Workflow form.

For details about referencing users from tabbed dataforms (parent and child dataforms), see Workflows and Tabbed Dataforms.

## Start Date Source, Due Date Source

Date Source 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. For Date/Time fields you have an additional option to set Minutes.

**Due Date Source**: Tasks created by this workflow 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.

Start Date Source Options

Date Source Create Date Specific Date From a Field on a Form

\* Offset 0 Business Days ▼

For date or date/time 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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.
- **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, business hours, end of month, beginning of year, or end of yearFor Date/Time fields you have an additional option to hours and minutes.
- 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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.
- 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 Add Workflow 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).

Lookup and

Lookup and Multi-Lookup field names vary by dataform. To display as an

## Multi-Lookup fields

available field on a workflow item, a Lookup or Multi-Lookup field must be set as a workflow cloneable field.

**Note:** Multi-Lookup fields work the same as a regular Lookups except that users can pick more than one selection from the list of available options.

### To configure a lookup field:

Click next to a Lookup or Multi-Lookup field.
 The Status Options dialog box opens.



#### 2. Select an option:

- None: This is the default initial state. When the workflow item triggers, any Lookup or Multi-Lookup field set to None will be blank on the new or updated task. The only exception is when the field is a required field (designated by red text). You must set a value for required fields.
- **Specific Value:** When the workflow item triggers, the Lookup field value or Multi-Lookup field value(s) that you select will be set in the corresponding field on the new or updated task.
- From a Field on a Form: When the workflow item triggers, the set value(s) from the Lookup field or Multi-Lookup field on the form you select auto-fills the corresponding field on the new or updated task. The From a Field on a Form option is only available when there are Lookup or Multi-Lookup fields on other forms in the same workspace that have the same Lookup Group.

**Note:** Tabbed form Lookup and Multi-Lookup fields have the following naming convention to help you determine where the field you are selecting is located: \*<**Dataform Tab Name> -- <Field Label>** (**FieldName**).

See the example image below showing two Lookup fields in the **Field** selection. The first field in the Lookup is located on the home form (i.e., parent form). The second field is located on a tabbed extension of the parent form (or child form) and uses the aforementioned naming convention.



See the example image below showing two Multi-Lookup fields in the **Field** selection. Just as with the example above of a regular Lookup field, the parent form field and child form field are easily distinguishable.

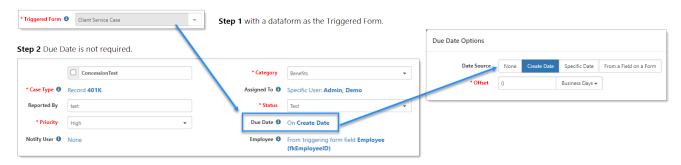


3. When ready, click **Ok**.

## **Triggered Form: Dataform**

In Step 1 Triggering, 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 Triggering, in Triggered Form, if you selected a dataform, the displayed fields vary, depending on your selections in Step 1. The following table illustrates some of the fields that you might see when using a dataform.

Item Name	Provide a short descriptive name for what this workflow object is.
IsMarkedForDelet ion	When this option is selected, the Workflow 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.
Attach To	This field is available only when a user selects <b>Task</b> in the <b>Triggered Form</b> field. This field indicates the form that the task will be assigned to. Select <b>This Form</b> to indicate that the form that triggered the workflow will be the form to which the task is attached. <b>Note:</b> If a form selected in the <b>Attached To</b> field is inactivated or removed from the workspace at some point in time and the workflow item is not edited to select a different form, then the task will attach to the triggering form.
Subject	Subject Line that displays on the task. This field supports field replacement. See Step 2: Content.
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. See Step 2: Content.
Category	Choose the appropriate Task Category.
Status	Select the appropriate Task Status.
Priority	What is the criticality of this task?
Туре	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.
	To change Assigned To and Owner:
	<ol> <li>Select Current User.</li> <li>The Assigned To or Owner Options dialog box opens.</li> </ol>

#### 2. 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.

#### 3. Click Ok.

You are returned to the Add Workflow form.

For details about referencing users from tabbed dataforms (parent and child dataforms), see Workflows and Tabbed Dataforms.

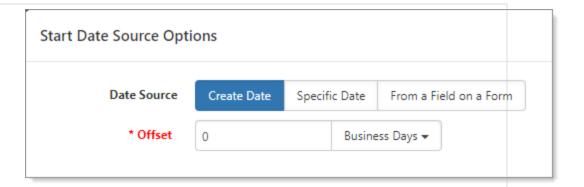
## Start Date Source, Due Date Source

Date Source 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. For Date/Time fields you have an additional option to set Minutes.

**Due Date Source**: Tasks created by this workflow 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.



For date or date/time 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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.
- 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, business hours, end of month, beginning of year, or end of yearFor Date/Time fields you have an additional option to hours and minutes.
- 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, business hours, end of month, beginning of year, or end of year. For Date/Time fields you have an additional option to hours and minutes.

- 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 Add Workflow 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).

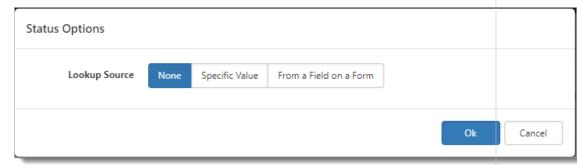
# Lookup and Multi-Lookup fields

Lookup and Multi-Lookup field names vary by dataform. To display as an available field on a workflow item, a Lookup or Multi-Lookup field must be set as a workflow cloneable field.

**Note:** Multi-Lookup fields work the same as a regular Lookups except that users can pick more than one selection from the list of available options.

### To configure a lookup field:

Click next to a Lookup or Multi-Lookup field.
 The Status Options dialog box opens.



- 2. Select an option:
  - **None:** This is the default initial state. When the workflow item triggers, any Lookup or Multi-Lookup field set to None will be blank on the new or updated task. The only exception is when the field is a required field (designated by red text). You must set a value for required fields.
  - **Specific Value:** When the workflow item triggers, the Lookup field value or Multi-Lookup field value(s) that you select will be set in the corresponding field on the new or updated task.
  - From a Field on a Form: When the workflow item triggers, the

set value(s) from the Lookup field or Multi-Lookup field on the form you select auto-fills the corresponding field on the new or updated task. The **From a Field on a Form** option is only available when there are Lookup or Multi-Lookup fields on other forms in the same workspace that have the same Lookup Group. **Note:** Tabbed form Lookup and Multi-Lookup fields have the following naming convention to help you determine where the field you are selecting is located: \*<**Dataform Tab Name> -- <Field Label>** 

See the example image below showing two Lookup fields in the **Field** selection. The first field in the Lookup is located on the home form (i.e., parent form). The second field is located on a tabbed extension of the parent form (or child form) and uses the aforementioned naming convention.



(FieldName).

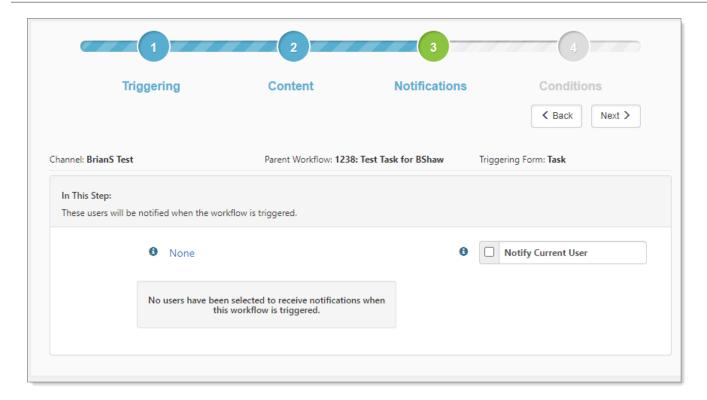
See the example image below showing two Multi-Lookup fields in the **Field** selection. Just as with the example above of a regular Lookup field, the parent form field and child form field are easily distinguishable.



- 3. When ready, click Ok.
- 3. When done, 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.

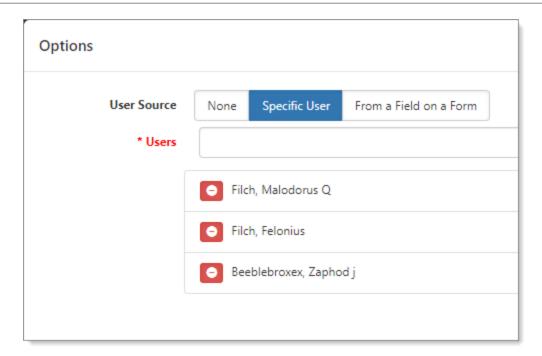


#### To add notifications:

- 1. To notify the current user (the triggering user), select **Notify Current User**.
- 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 Workflows and Tabbed Dataforms.



3. When ready, click **Ok**.

The notification list displays the users that are to receive the notification.



#### To remove users from the notifications list:

- 4. Click (Remove).
- 5. When you are ready to move to Conditions, click **Next**. Step 4: Conditions opens.

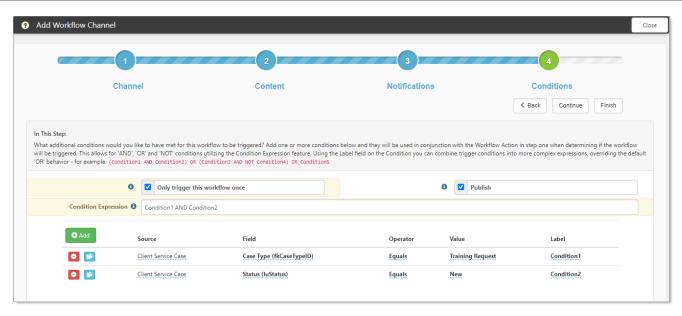
# Step 4: Conditions

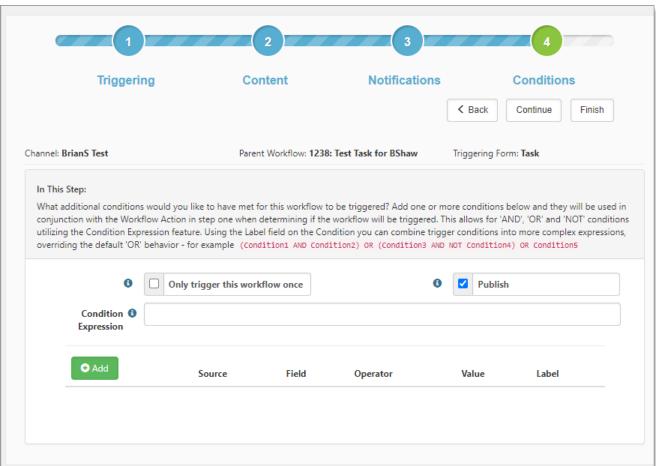
In this step, you can add one or more conditions to use in conjunction with the Workflow Action in Step 1 when determining if the workflow is triggered. What additional conditions would you like to have met to trigger this workflow?

**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 the procedure later in this topic.

**Clone a trigger**: For triggers that are similar, use the Clone feature to copy a trigger condition. See the procedure later in this topic.

**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 the procedure later in this topic.





# **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 readonly. 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	<ul> <li>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.</li> <li>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. You can also add triggering conditions based on a Value comparison. The comparison Value can be a manually typed, static value or a field value located on the same dataform or a different single dataform. (If you are selecting the same dataform, it can be a either be a single dataform or a multi-form. If you are selecting a different dataform, it must be a single dataform.)</li> <li>These conditions are combined with the Workflow Action set in Step 1 using an implied AND.</li> <li>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 Condition 2 OR Conditions.</li> <li>The Condition Expression field allows for AND as well as OR conditions</li> </ul>

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	The <b>Source</b> list includes the triggering form and its tabs, the channel trigger (i.e., the original form that started the channel), all triggerable, active single-forms, and the tabs of those single-forms. Applicable server data procs, if configured, and other workflow items, such as a HdrAction, may also be included.
	Note:
	<ul> <li>HdrAction is only available when the Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.</li> </ul>
	<ul> <li>Condition Expressions operators (AND, OR, and NOT) work across multiple dataforms.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>The Add Untriggered functionality option is available when adding fields from this source. If you select an untriggered field, ClientSpace will set the field to triggerable in the field settings.</li> </ul>
	<ul> <li>If the dataform is the main triggering dataform for the workflow, the condition Source is Channel Trigger: <nameoftriggeringform>.</nameoftriggeringform></li> </ul>
	<ul> <li>If the dataform is a cloned dataform workflow item, the condition Source is Workflow #<itemnumber>: <itemname>.</itemname></itemnumber></li> </ul>
	For additional details about tabbed dataforms, see Workflows and Tabbed Dataforms.
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 dataform **Active** field can even be used to trigger a task or form. (If you are building a dataform condition using the **Active** field, the **Source** must be the Triggering Form.) Workflow conditions can be built based on a specific **Active** field value (i.e., Checked or Unchecked) or whether the **Active** field was changed from its current value (i.e., IsDirty):

- **Field** = Active, **Operator** = Equals, **Value** = Checked or Unchecked.
- **Field** = Active, **Operator** = IsDirty.

However, keep in mind that when you add a new record (such as a Client Service Case record), behind-the-scenes the system is applying a default **Active** status to the record which places the **Active** field in an edit or "IsDirty" status upon "Add". If you do not want a workflow condition that uses the **Active** field as a trigger condition to trigger on the initial "Add" of a record, be certain to change the **Execute On** field value (located on the Step 1: Triggering page of the Workflow Items wizard) to **Update**.



## See Step 1: Triggering.

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:

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.

	<ol> <li>In <b>Field</b>, select an entry and click <b>Ok</b>.         The selected field is marked as triggerable and now appears in the Field list.     </li> </ol>
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 <b>Multi Lookup</b> 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	A label is used when combining conditions into a complex Condition Expression. ClientSpace assigns a label to a new condition with the naming convention C#. For example, C1 for the first condition that you create, C2 for the second, and so on. You can change the label name by selecting the name of the label and typing a new name for the label. For example, you can select the C1 label and enter Condition1 as the new label name.  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 minutes/hours/days/months/years from a date:

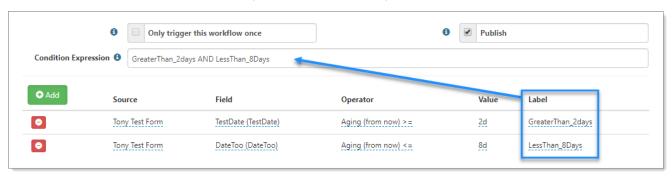
# 3. Complete the form fields:

Field	Select a <b>Date</b> or <b>Date Time</b> datatype field. This action makes the Aging operators available in <b>Operator</b> .
	<b>Note:</b> When comparing <b>Date</b> to <b>Date Time</b> datatypes (or vice versa) 12:00:00AM is used as the comparison time for the <b>Date</b> datatype.
Operator	Select one of the following:
	• Aging (from now) > =
	<ul> <li>Greater than or equal to the number of days/months/years in Value.</li> </ul>
	• Aging (from now) < =

	<ul> <li>Less than or equal to the number of days/months/years in Value.</li> </ul>
	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	<ul> <li>Type a number accompanied by:</li> <li>mm: for minutes (Only works with Date Time fields)</li> <li>h: for hours (Only works with Date Time fields)</li> <li>d: for days</li> <li>m: for months</li> <li>y: for years</li> </ul>

## **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

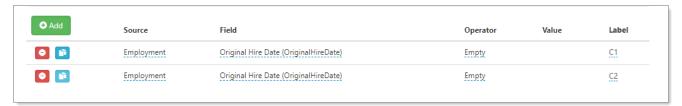
To save some time, you can clone a trigger condition and then edit as appropriate.



# 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**.

#### What's next?

You can optionally add attachments. See Step 5: Attachments.

# Step 5: Attachments

You can optionally add attachments to a workflow. The attachments are added to the triggered form when the workflow is executed. You can add two kinds of attachments:

- **File upload field attachment:** Select a file upload field from a form. The form can be a single form located in the workspace where you are building the workflow OR a multiform if it is the triggering form.
- **Static attachment:** A static attachment is an attachment not associated with a dataform. Once you click **Apply** or **Save** on a new workflow, an Attachments panel displays. You can browse to any file on your computer and upload it to the workflow. When the workflow executes, it is added to the triggered form along with any file attachments.
- **Attachment link:** You can also add a link to a site on a triggered form from the workflow Attachments panel. When the workflow executes, it is added to the triggered form along with any file attachments.

Also see Putting It All Together: Workflow Attachments.

#### To add an attachment:

- 1. Click Add.
- 2. To add file upload field attachments, complete the form:

Dataform	Select the dataform where the file upload field containing the attachment is located. The listed forms are single forms only with exception of the triggering form. If it is a multiform and not a single form, it is also included in the list.
Field	Select the field upload field containing the attachment you want to add to the triggered form.
	<b>Note:</b> If the field is blank when the workflow is executed, no workflow attachment will be added to the triggered form.

- 3. Repeat step 2 above until all desired file upload field attachments are added.
- Click Apply or Save.
   If this is a new workflow, the Attachments panel displays.
- 5. Optionally, you can add a static attachment that is not associated with a dataform from the **Attachments** panel.

Follow these steps to add a file attachment:

- a. Click the **Attachments** panel.
- b. On the **Attachments t**ab, click **Add** + to upload a new file. The Upload File window displays.
- c. Click **Choose File**.
- d. Locate the file on your computer and click **Open**.
   The file name displays in the **File** field of the Upload File window.
- e. Optionally, you can provide **Description**, **Category**, and **Tags** information
- f. Click **Save** on the Upload File window.

  The Upload File window closes and the attachment file you just added is listed on the Attachments panel. You can click the file name or click **(Edit)** next to the attachment file name to view your file.

**Note:** You can discard an uploaded file by clicking (**Remove**) next to the attachment file name.

6. Optionally, you can add an attachment link to a site on the triggered form from the **Attachments** panel.

Follow these steps to add a link attachment:

- a. Click the **Attachments** panel.
- b. Click the **Links** § tab, click **Add** + to add a link. The Link File window displays.
- c. Type the URL in the Link field.
- d. Optionally, type a link description in the **Description** field.
- e. Click **Save** on the Link File window.

  The Link File window closes and the link you just added is listed on the **Links** tab of the Attachments panel. You can click the link name or click **(Edit)** next to the link to test the link.

**Note:** You can discard a link by clicking 👅 (**Remove**) next to the link name.

### **Completing the Configuration**

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

## To complete the configuration, when ready, you can click Back, Continue, or Finish:

- 1. Click **Back** to return to the previous step of the Workflow item.
- 2. 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.

- **Note:** Alternatively, you can click **Continue Workflow from Here** in the Dependent Workflow panel to add a dependent workflow.
- 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.

# Putting It All Together: Workflow Attachments

- When the workflow executes, any workflow attachments (file upload field attachments, static file
  attachments, and attachment links) are added to the **Workflow Attachments** panel located in
  the **Action Center** of the triggered form. See the Workflow Attachments section of Workflow
  Channel Action Items.
- Workflow Attachments links are links to the original URL.
- Workflow Attachments are links to the original source file as it existed when the workflow was executed
- If a source file is later updated after the workflow has been executed, the link to the version of the file at the time of workflow execution remains intact on the triggered form.
  - **Note:** If you no longer want that version of the file associated with the triggered form, you can delete it by clicking (**Remove**) next to the attachment file name in the **Workflow Attachments** panel of the triggered form.
- If a source file is deleted by a user, the file cleanup process bypasses deletion of the file if any **Workflow Attachments** panel file links to that file are found.

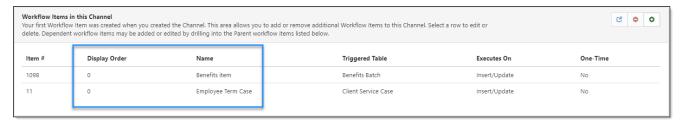
# Changing the display order of workflow items

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:

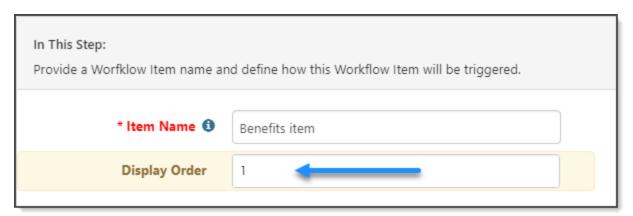
Open a workflow channel with multiple workflow items.
 The Channel opens, with the Workflow Items listed. Note the column Display Order. In the

following example, both workflow items have a display order of 0 (zero).

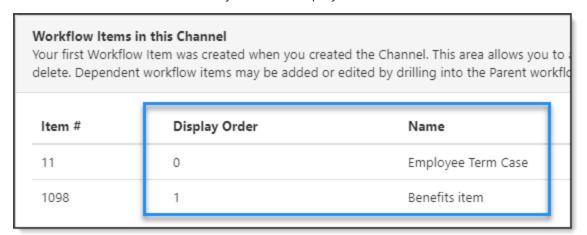


- 2. To change the display order, select and open (double-click the item or 

  ) 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:**

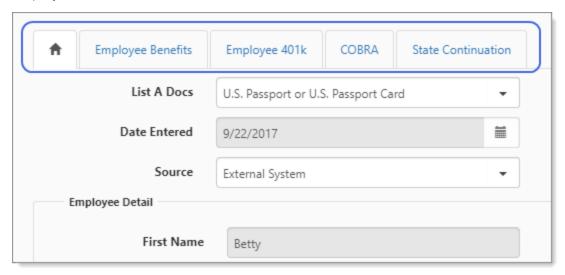
- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- 2. From the list you can do the following:

Action	Description
Add	To add a workflow channel, click <b>Add</b> .
Delete	To delete the selected workflow channel, click <b>Delete</b> .
Details	To view details about a workflow channel, click <b>Details</b> .
Visualize	<ul> <li>To view the item number and name, click <b>Visualize</b>.</li> <li>To open an item in the workflow channel configuration, click an item.</li> </ul>
Download as CSV file	<ul> <li>You can download the workflow as a CSV file:</li> <li>The file name is Workflow Channel <number><workflow channel="" name="">.csv.</workflow></number></li> <li>For example, Workflow Channel 36-Scheduled Test.csv.</li> <li>The contents resemble the layout, where indentations represent children workflow items.</li> <li>The workflow items and their children names are formatted as #<number>:<name>.</name></number></li> <li>You can do the following:</li> <li>Edit the data.</li> <li>Report on the data with a graph or table.</li> <li>To download the workflow as a CSV file:</li> <li>1. From the list, select a channel (highlight the entry).</li> <li>2. Click Visualize.         The Workflow Channel visualize dialog opens.</li> <li>3. Click  (Download as CSV file).</li> <li>For Chrome, when the download finishes, you see it at the bottom</li> </ul>

Action	Description
	<ul> <li>of your browser.</li> <li>For Internet Explorer, to view downloads, select <b>Tools</b> &gt; <b>View</b> downloads.</li> </ul>
Publish and Unpublish	<ul> <li>When selected, the Published column indicates the workflow channel is published.</li> <li>To unpublish the workflow channel, clear the <b>Published</b> option.</li> <li>To publish an unpublished workflow channel, select the <b>Published</b> option.</li> </ul>
View Published and Unpublished	By default, the <b>Status</b> chiclet is set to <b>Published</b> .
Workflow Channels	To toggle the Status:
	1. Click the <b>Status</b> chiclet <b>Published</b> .
	The More dialog box opens.
	2. Select a <b>Status</b> : All, Published, Unpublished.
	3. Click Search.
	The list displays according to your selection.
	<ul> <li>Unpublished workflow channels display in italics and bold.</li> <li>Published entries display as normal with the Published column selected.</li> </ul>
	4. You can also click the <b>X</b> beside <b>Status Published</b> .
	This action displays all workflow channels: published and unpublished.
	5. To reset the view to Published, click <b>Reset</b> .
Visualize	<ul> <li>To view the item number and name, click <b>Visualize</b>.</li> <li>To open an item in the workflow channel configuration, click an item.</li> </ul>
Workflow Items	To view workflow items associated with a workflow channel, click the workflow channel to select it and then click the <b>Workflow items</b> button located above the grid in the upper left corner.
	<ul> <li>Unpublished workflow items display in italics and bold with the Published checkbox unchecked.</li> </ul>
	<ul> <li>Published entries display as normal text with the <b>Published</b> checkbox checked.</li> </ul>
	<ul> <li>To open a workflow item in workflow channel configuration, double- click the item or click</li></ul>

# Workflows 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 Workflows, you can reference data from a tabbed dataform set on the:

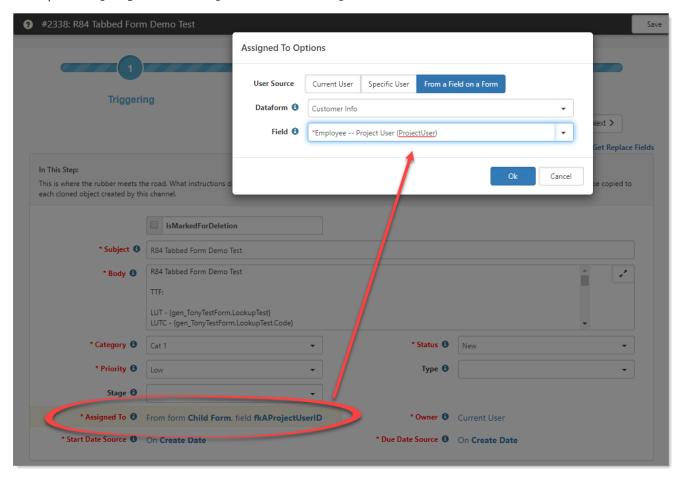
- Content step
- Conditions step
- Notifications step

# 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**, when you select From a Field on a Form, you must complete the configuration by choosing a dataform and field.

The user type fields on workflow item tasks and dataforms include any child forms containing a user datatype field 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:

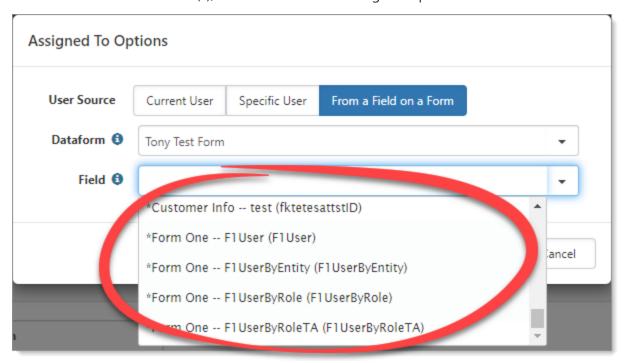
\*Form Two -- User By Role (fkUserByRoleID)

\*Form Two -- Specialist User (fkSpecialistUserID)

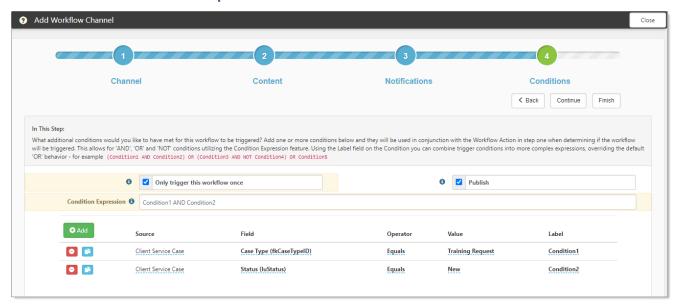
\*Form Three -- Other User (fkOtherUserID)

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

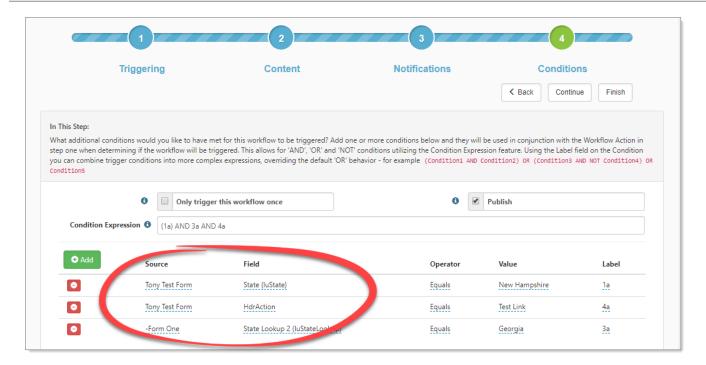


### Source and Field lists

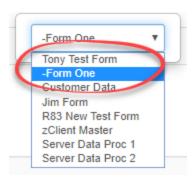
The **Source** list includes the triggering form and its tabs, the channel trigger (i.e., the original form that started the channel), all triggerable, active single-forms, and the tabs of those single-forms. Applicable server data procs, if configured, and other workflow items, such as a HdrAction, may also be included.

**Note:** HdrAction is only available when the Source is the parent triggering form. If Source is anything other than the Triggering Form, HdrAction is not available in the Field list.

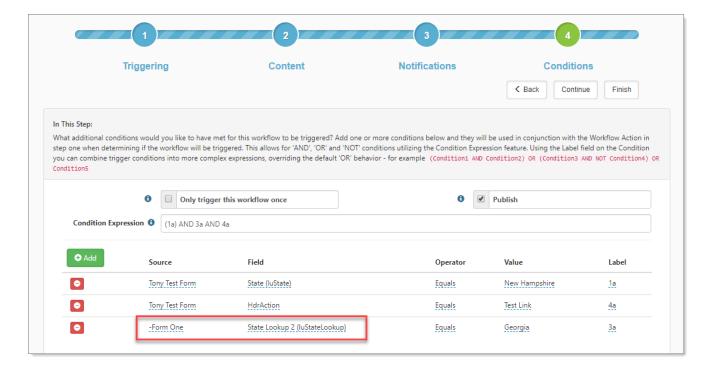
In the **Source** list, the primary tabbed dataform precedes the child tabbed forms. The child dataform names are prepended with a dash (–). The **Field** list is filtered based on the selected Source.



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>.

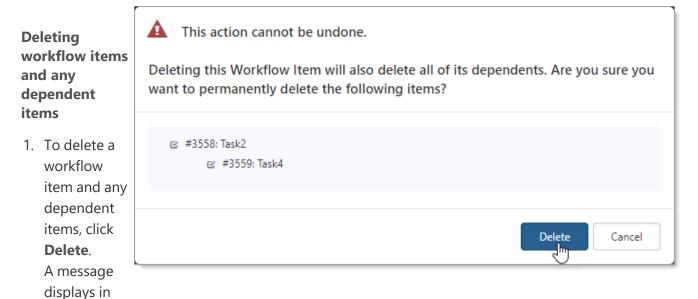
For tabbed form fields that are used in triggering workflows, you cannot delete or inactivate any of the fields. The system indicates where the field is used: *Channel: <Workflow Channel Name>*, *Item: <Workflow Channel Item Name>* (with a clickable link to the affected Workflow Channel configuration).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

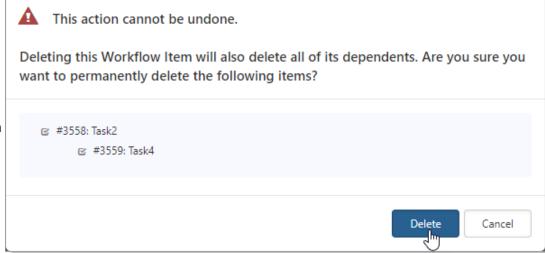


the form of a simplified flowchart showing the dependents. When you delete the workflow item, the dependents are also deleted.

2. Click **Delete** or **Cancel**.

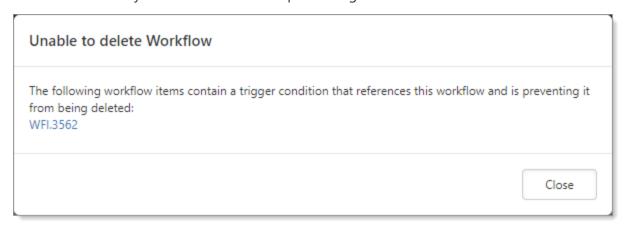
# Workflow items with dependent conditions

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.



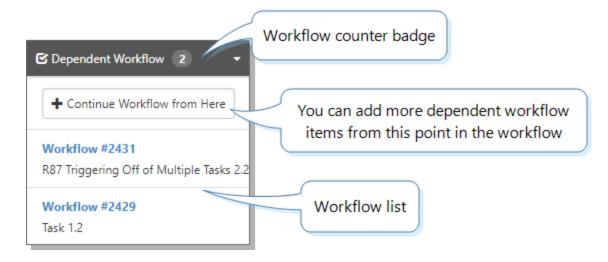
The first message is in the form of a simplified flowchart showing the dependents: "This action cannot be undone."

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**

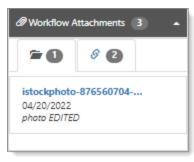
Workflow Attachments store file or link attachments created when a workflow item generates a task or dataform. These attachments are specific to the workflow that created the record. When that workflow item is automatically generated, it contains a link back to the original file or URL linked to the workflow during configuration.

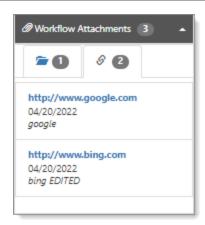


This process does not clone the file or link; it merely provides a link to the original object. Workflow Attachments are useful for workflows designed around standardized processes such as employee onboarding, where you need to use the same document every time.



**Note:** When a workflow triggers and the workflow item includes a file or link attachment, the system adds the attachment to the Workflow Attachments action item on the Task or Dataform.



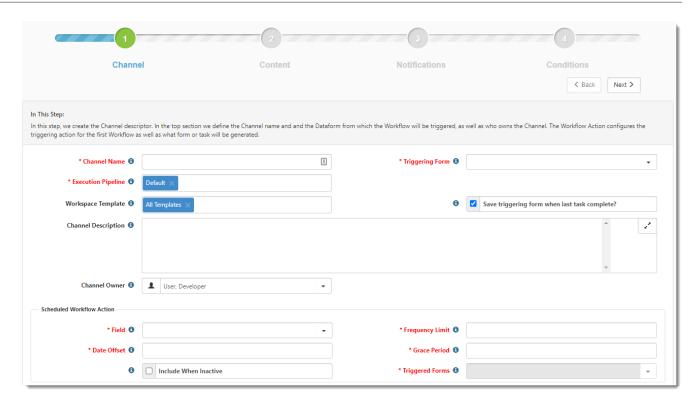


# Configuring Scheduled Workflows

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:

- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- 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.

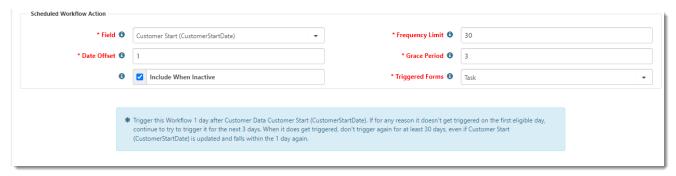


# 4. Configure the following options:

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.
Include When Inactive	Optional field. When the checkbox is checked, triggering of the scheduled workflow will occur for both active and inactive triggering forms. When the checkbox is unchecked, triggering of the scheduled workflow will only occur

	for active triggering forms.
Triggered Forms	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.

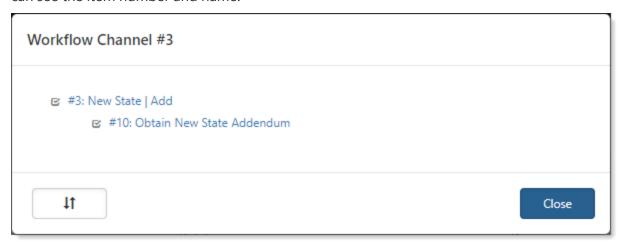
If all the triggering conditions are met, the dataform or task is generated from the Workflow. These actions can then trigger other dependent workflow items (such as a second task spawned when the scheduled task is complete) or completely new workflow channels. In this way, scheduled workflows can drive 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:

- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- 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 in the Links panel of the Action Center. The Workflow History link is available to Global Admin and Developer users by default. Additionally, the workflow history link is available to users in a role that contains the Can\_Access\_Workflow\_History role entity.

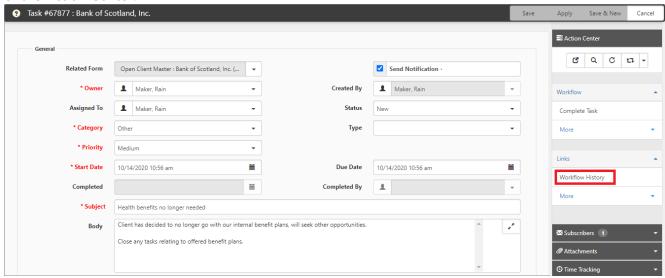
**Note:** The system only displays the Workflow History Link if a triggering event executed a workflow item on the dataform or task.



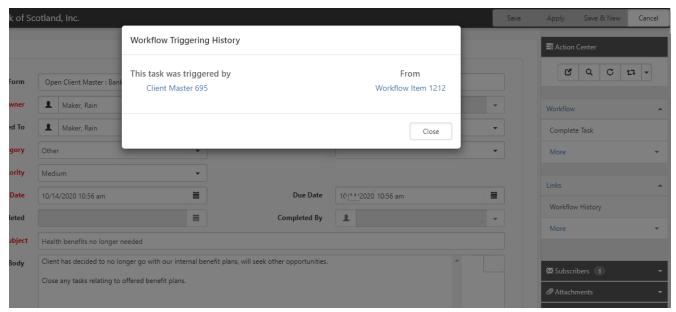
The triggering history shows the most recent event for the current task or dataform and cascades to the first triggering event.

# To view workflow history:

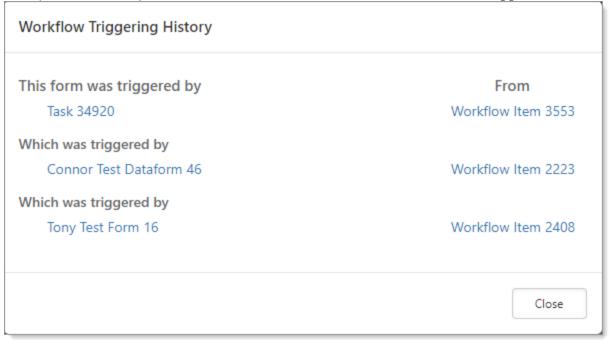
Open a dataform or a task.
 The following example illustrates an open task. Note the Workflow History link in the Links panel of the Action Center.



2. In the **Links** panel of 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

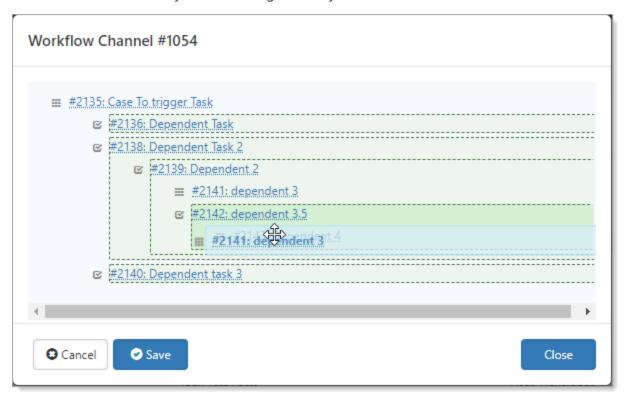
With the Visualizer, you can move or insert tasks to different levels. Workflow items are displayed with an item number and item name: #<Item Number>: <Item Name>.

### 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.

- Click <sup>1†</sup> (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

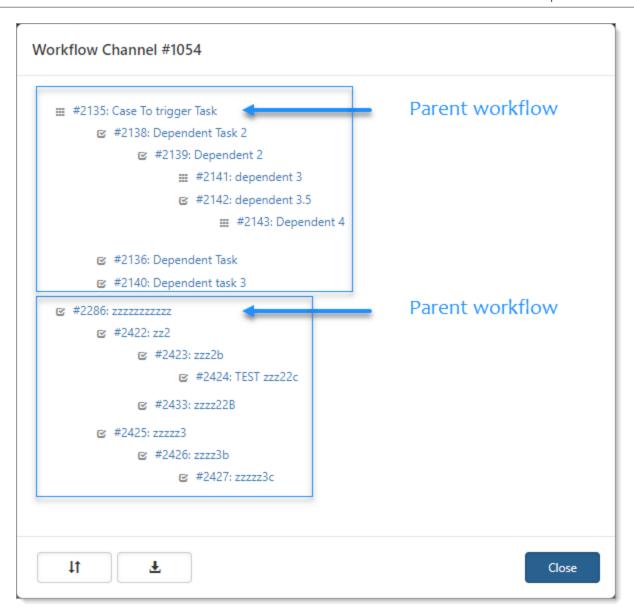
System administrators can configure a workflow item that can trigger from the Status of other Task workflow items in the same item channel.

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.

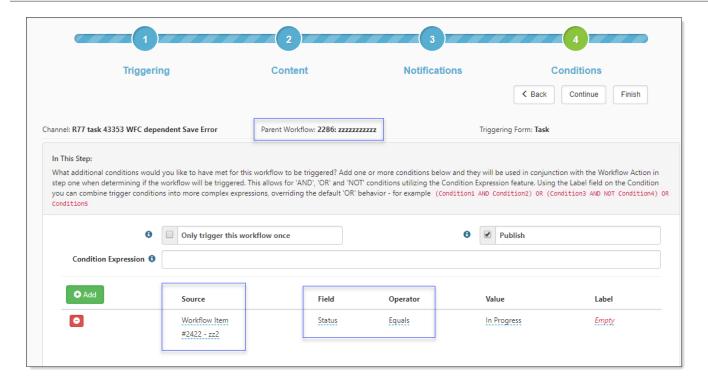
Using workflow conditions, you can specify additional task triggering conditions not related to the immediately preceding workflow task. Admins can use the Status from any task in the related workflow chain as an additional triggering condition by selecting the option for Workflow Item from the Source 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.



# Cloning Surcharges with Workflow Channels

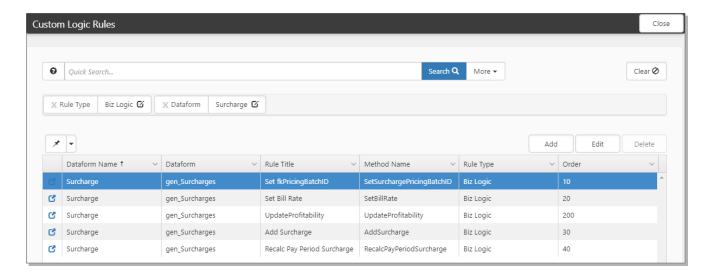
You can clone Surcharges with Workflow Channels with some simple setup configurations. First, you must update the business rules on Surcharges. Next, you must configure a Workflow Channel to clone the Surcharge. This topic guides you through the configuration.

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.

**Note:** Instead of using workflow channels to clone surcharges, the R100 release introduced the option of setting a surcharge type to clone surcharges during the Quick Create of the Pricing Batch. See Surcharge Types and Creating Pricing for more information about using that method to clone surcharges.

# 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:

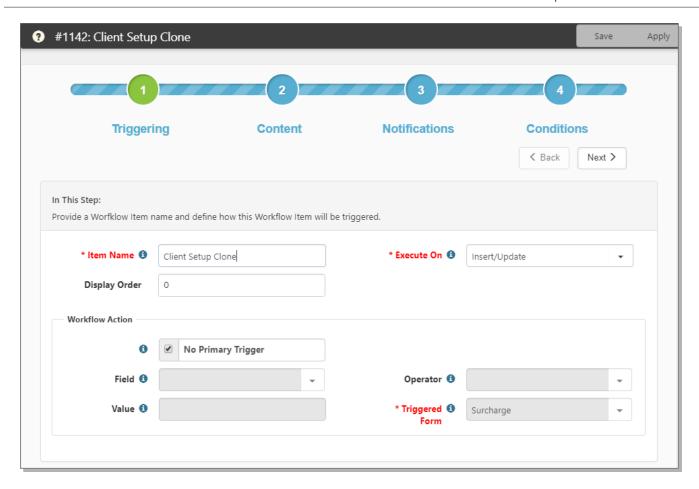
- Go to System Admin → > Advanced > Manage Rules.
   The Custom Logic Rules display.
- 2. In **More**, search for Rule Type > Biz Logic, Dataform > Surcharge, to locate the methods (see screenshot).
- Open ( Jump) a Method Name, such as SetSurchargePricingBatchID.
   The Rule Details form opens.
- 4. 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:

- Go to System Admin > Workflow Channels.
   The Workflow Channels dashboard opens.
- 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 <b>Update</b> .

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 <b>Surcharge</b> .

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.
- 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**.
- 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 <b>Pricing Batch</b> .
Field	Select Status (luBatchStatus).
Operator	Select <b>Equals</b> .
Value	Select <b>New</b> .
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

Field	Field name
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

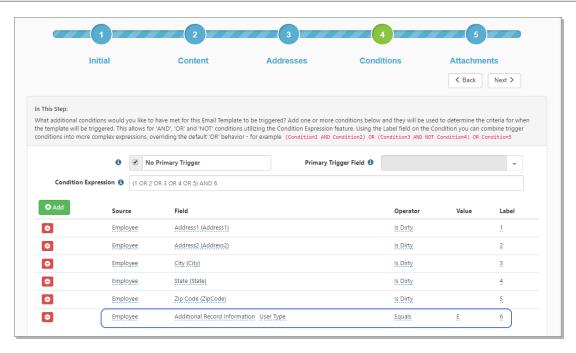
The Client Service Case dataform is provided for the PEO systems with a Server data proc. More information about the default Server Data Procs is in Default Server Data Procs.

# 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



### AdditionalInform

ation 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 pseudofield 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.

# **Time Tracker**

The Time Tracker module offers the following features:

- Resource utilization tracking through the creation of time tracking records.
- Allocation of tracked time to configured time tracking categories.
   Note: The system can automatically set the category for any time tracking record by using the associated task category metadata configured on the time tracking category.
- The ability to track time spent on tasks and on certain dataforms (such as a Worker's Comp case).

# 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:**

- 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.
- Go to System Admin → > Advanced > Time Tracker Categories.
   The Time Tracker Categories dashboard opens.
- 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.

# **Related Topics:**

- Configuring Default Time Tracking for Task Categories
- Using Time Tracking Categories
- Customizing Workflow: Adding and Editing Time Tracker Categories

# **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.

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.

# **Related Topics:**

- Configuring Default Time Tracking for Task Categories
- Customizing Workflow: Adding and Editing Time Tracker Categories
- Using Time Tracking Categories

# 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:

- 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.

# **Related Topics:**

- Customizing Workflow: Adding and Editing Time Tracker Categories
- Using Time Tracking Categories
- Configuring Default Time Tracking for Task Categories

# 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:

- 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.

### **Related Topics:**

- Configuring Default Time Tracking for Task Categories
- Customizing Workflow: Adding and Editing Time Tracker Categories

• Using Time Tracking Categories

# 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.

An error message displays and prevents you from completing certain "delete" or "modify" actions on a dataform or dataform field when a field on a Parent or Tab dataform is used in other configurations which depend on a dataform field.

Below is a list of actions that <u>cannot</u> be performed on a Parent or Tab dataform with a business rule, workflow channel or email template dependency:

- Unlinking, deleting, or inactivating a dataform that is used a triggering form, target form, or source form in business rule, email template or workflow channel configuration.
- Unlinking, deleting, or inactivating a single-form parent dataform, multi-form parent dataform, or child tabbed dataform that contains a triggering field, target field or source field used in business rule, email template or workflow channel configuration.
- Deleting or inactivating a field on a single-form parent dataform, multi-form parent dataform, or child tabbed dataform that is used as a triggering field, target field or source field in business rule, email template or workflow channel configuration.

All dependencies must be removed to proceed. In certain instances, a link to the dependency is provided to help you assess whether a dependency can be safely removed or must stay in place.

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:

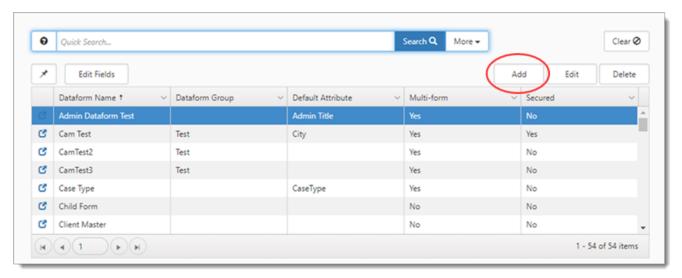
- The type of data you need to track
- How that data is used in ClientSpace and other systems

• 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.

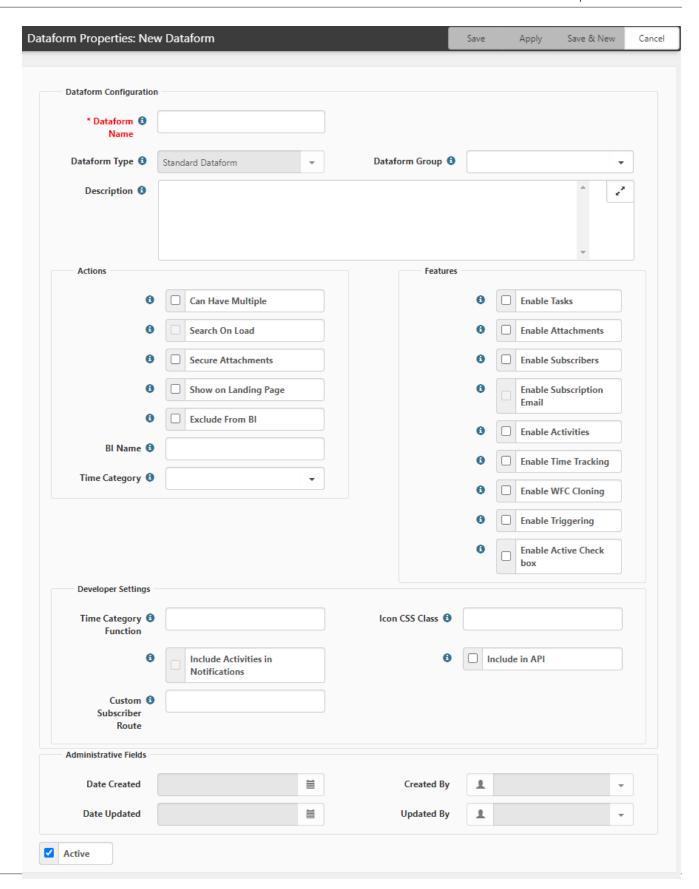
### To add a new dataform:

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.

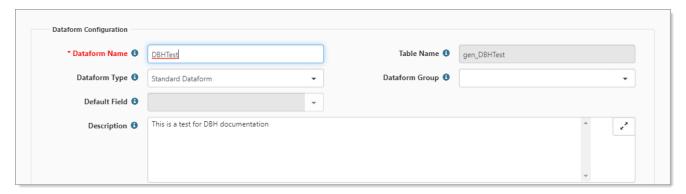


Table Name	Displays the generated table name that is stored in the database. This can be useful for reporting. You cannot edit this field.
Default Field	When you associate one dataform with another through linked fields, the default attribute is displayed in the list. It is a best practice to make the default attribute field of the form Required, so any linked forms have something to display.
	<b>Note:</b> If you attempt to delete a field that is set as the default field on the dataform, the system prevents you from deleting the field until you select a different default field for the dataform. See Deleting or Inactivating Dataform Fields for more information.

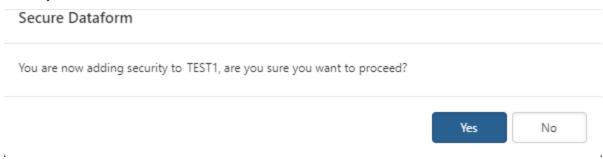
# **Next: Action Center**

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 Fields, Tabbed Forms, or the Form not Secured button
- 2. Use the following field descriptions to guide you through the configuration.
  - **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.)
  - Form not Secured button : Secures the form and generates a security entity for the field in the format of **gen\_TableName**. You must click **Yes** in the **Secure Dataform** window to add security to the dataform.



**Note:** To unsecure a form, click the **Form Secured** button and click **Yes** in the **Unsecure Dataform** window to remove security for the dataform.

# Vou are now removing security from TEST1, are you sure you want to proceed? Yes No

For more details about dataform security, review Dataform and Dataform Field Security. For more details about using security entities in Role security, review Configuring Organization and Workspace Security.

## **Next: Customize the Actions**

## To continue customizing your dataform:

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

Can Have Multiple	Single vs Multi dataform - dataforms come in two basic flavors: The Single dataform (such as the Client Master) has a one-to-one relationship with the Workspace, only one can exist in the Workspace. The Multi dataform (such as Locations) has a one-to-many relationship with the Workspace, such as physical locations for a client, or paycheck records for an employee.	
Search On Load	Multiforms present as a list of records, whether this list is populated automatically when you land on the dataform search or have to click the <b>Search</b> button to populate the list is a function of search on load.	
Secure Attachments	Secures attachments for this Dataform. This generates a security entity so that users with that entity can see, add, or edit attachments ( <tablename> \$Attachment).</tablename>	
Show on Landing Page	Indicates the dataform will be available from the Workspace landing page. Leave this unchecked if you want to only display the dataform in Next as a tabbed or linked dataform.	
Exclude From BI	Checking this box will remove the dataform from the list of available tables in the Datasources section of Business Intelligence, effectively hiding the dataform from reporting.  Note: When the Exclude from BI check box is selected (set to True), the BI Name field is disabled.	
BI Name	If populated, the <b>Friendly Name</b> stored in this field will display in Business Intelligence reporting instead of the table name.	

	<b>Note:</b> When the <b>Exclude from BI</b> check box is selected (set to True), the <b>BI Name</b> field is disabled.	
Time Category	On the creation of a Time Tracking record from this dataform, the Category field of the record will default to the value selected here.	

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

## **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 <sup>1</sup> . 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	
Enable Active Check box	<ul> <li>option cannot be cleared until the dependencies are removed.</li> <li>This option controls if the Active check box</li> <li>on the bottom of the dataform is present for Non-Global Admin users.</li> <li>Check this box so that Non-Global Admin users can activate or deactivate a dataform.</li> <li>Clear this check box so that Non-Global Admin users can NOT change the active state of a dataform. For example, you can clear this box for an active dataform to prevent Non-Global Admin users from accidentally deactivating the dataform, which can interrupt workflow processes.</li> </ul>	

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

<sup>&</sup>lt;sup>1</sup>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.

## 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

#### To view the audit trail:

- From an open dataform, in the Action Center, click Q (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.

### **Related Topics:**

- Dataform Properties
- Distributing your dataform: Making dataforms accessible
- Configuring a Dataform to open as a Module
- Configuring Dataform fields

# Moving a Dataform

You can move a dataform from one workspace to another. The following requirements must be met to move a dataform:

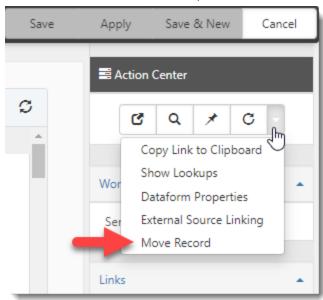
- The Enable Move Record field is checked on the Dataform Properties.
   Important: The Enable Move Record setting can only be enabled by a ClientSpace Professional Services representative. Please contact Professional Services for configuration assistance.
- The dataform you are moving must be a multiform.
- You must have edit rights to <u>all</u> fields on the form, including any secured fields on the form.
- You must be assigned a minimum of View rights to the MoveRecord security entity (System Admin\* > Security > Roles).

**Note:** Only Non-Global Admins require this entity assignment. Global Admins can move records by default as long as the **Enable Move Record** field is checked on the Dataform properties and they have edit rights to the fields.

- You must have access to the workspace to which you are moving the dataform.
   Note: Only workspaces that share the same template will be available when moving the dataform.
- You must have edit rights to all fields on the form, including any secured fields on the form.

#### To move a dataform:

- 1. Navigate to a workspace and open the dataform you want to move.
- 2. On the **Action Center** toolbar, click the down arrow and select **Move Record**.



**Note:** If the **Move Record** option is not present, ask your Global Admin to verify the dataform configuration and your access rights as detailed in the introductory paragraph of this topic.

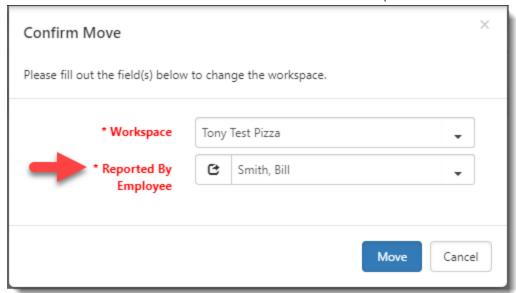
The Confirm Move popup window displays. It displays a **Workspace** field for selecting the destination workspace.

**Note:** The list of workspaces is filtered to workspaces in the same template.

The Confirm Move popup window also displays fields from the parent form containing values unique to the original workspace. You will need to specify new values from the destination workspace for these fields.

For instance, in the example below, the **Reported By Employee** field is listed. The list of employees from workspace to workspace is different. Even if the same employee existed in both

workspaces, they would <u>not</u> have the same unique identifier in both workspaces. Therefore, you must select a new value that exists in the destination workspace.



#### Note:

- Parent form fields that were not filled in (i.e., blank) are not displayed.
- Parent form fields referencing Admin Workspace records are not displayed.
- The parent form fields remain disabled until you select a workspace.
- 3. Select the Workspace and then select new values for any listed parent form fields.
- 4. Click Move.

# 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.

#### Note:

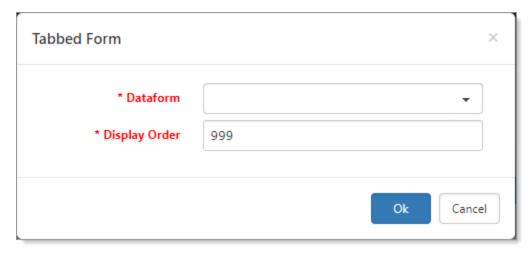
- You can add up to five tabs to a parent dataform. If you need to add more than the default limit, please log a case in the Extranet.
- If the parent form and the tabbed form have one or more identically named fields between them, a validation error message similar to the following displays listing all conflicts that must be cleared before the tab relationship can be saved:



#### To add dataform tabs:

- 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 employee?" 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: IuStatus

#### 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:

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

**Note:** 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. (Fields displayed may vary by **Element Type**.)

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	Field sets are not data entry fields, and no corresponding SQL Server field is created when a new fieldset data type is created. Field sets act as an organization container for other fields. The use of fieldsets typically makes the layout and

# Field Set Default

organization of a data form significantly better.

Allows you to control whether fields within a field set are visible or collapsed within the field set container when the form loads.

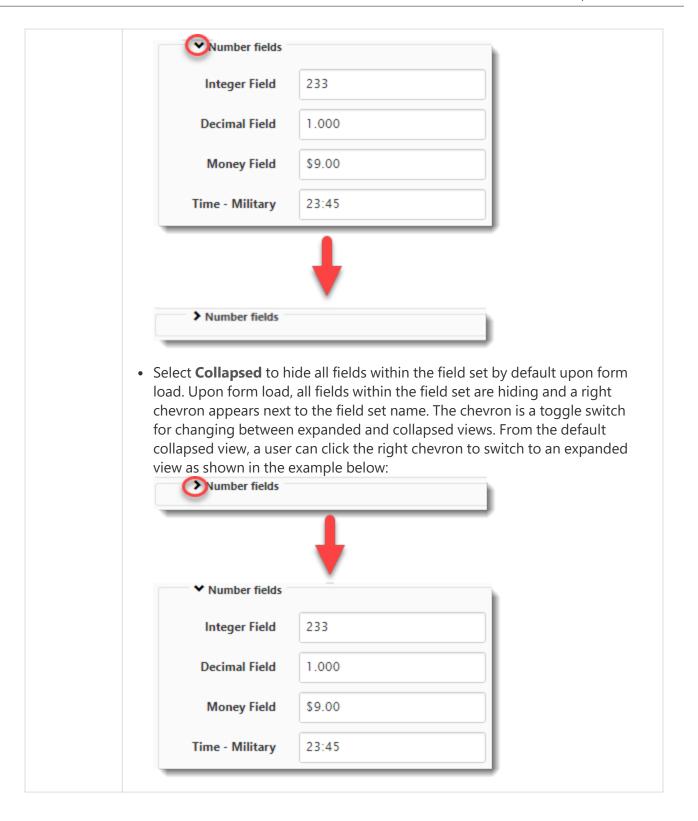
#### Note:

- This setting affects field display only. Dataform field validation still occurs on fields contained within field sets that are collapsed by default. Additionally, this setting does not interfere with workflow channel configurations that reference fields in collapsed field sets.
- With the ClientSpace Release 132 update, a one-time script will run to check
  for instances of Field Set Default that are empty and set them to Expanded
  so that you do not have to manually apply field set collapse/expand
  functionality to field sets that existed prior to when this feature was
  introduced. Previously entered Field Set Default values will be skipped by
  the script to preserve your entries.

#### You can:

 Select **Expanded** to display all fields within the field set by default upon form load.

**Note:** Expanded is the default selection when you add a new field set. Upon form load, all fields within the field set are visible and a down chevron appears next to the field set name. The chevron is a toggle switch for changing between expanded and collapsed views. From the default expanded view, a user can click the down chevron to switch to a collapsed view as shown in the example below:



• Clear the **Field Set Default** field to always display all fields in the field set with no ability to expand or collapse field sets.

#### 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 (Settings) to open the Style Configuration fieldset and change the style of the field label (for example, font type, style or color). You can:

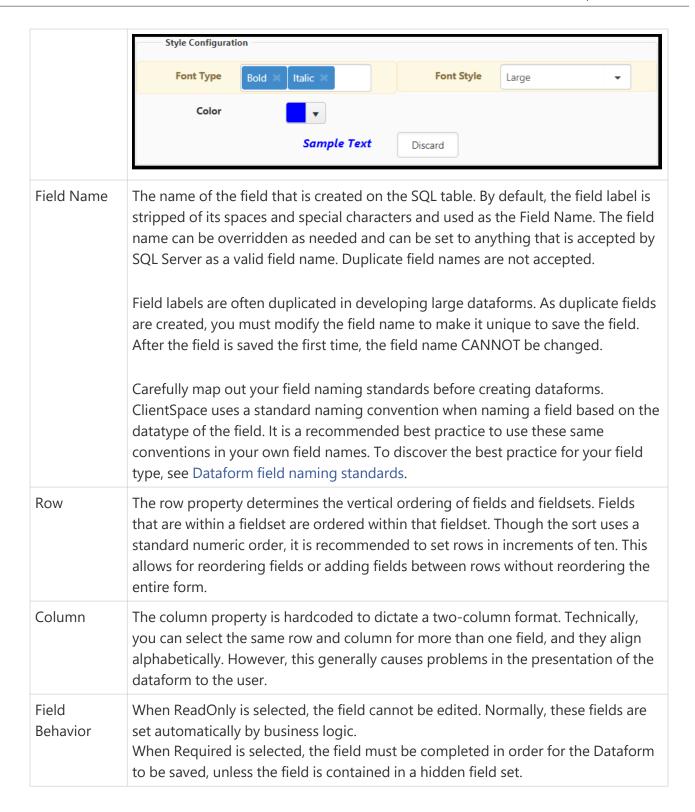
• Select **Normal**, **Bold**, **Underline**, or **Italic** in the **Font Type** field.

**Note:** After selecting one type you can select another so that you can add multiple font type attributes to the field label (For example, Normal and Underline, or Bold and Italic)

- Select Normal, Small, or Large in the Font Style field.
- Select the Color picker drop-down in the Color field and complete the following:
  - Enter a color Hex code (for example, #0000ff)
     Or
     Select a color and adjust the color with the slider
  - Click **Update** to set the color



- Review the Sample Text.
- (Optional) Click Discard to remove the style configuration for the field label.



#### Specifies the maximum character length of the field entry. This property is valid for Length Text, Text-Wide, and TextArea element types. For example, if the Length property is set to 10, a user can only enter 10 characters for the field. If this property is blank, the system does not limit the character length of the field entry. 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. Description Use the **Description** field to specify how and where a field is used in ClientSpace. This can help with dataform field maintenance activities, such as: Determining which unused fields to delete. • Reorganizing fields on a form (i.e., determining fieldsets to group fields.) This field has a 1000-character allowance. Note: Once you add Description text, you can view it from the Dataform fields list without needing to open the field properties record when you hover the mouse over the field name: User by Role fkUserbyRoleNEXTID User By Role Contact TA fkUserByRoleTAID fkOrgTypeAheadID Org Type Ah Field Name: ContactTA Data Type: Integer fkOrgContactRelatedID Org Contact Select Type: TypeAhead Table Contact TA ContactTA gen\_ConnorTestDataform Name: OrgContact Description: This field is an example Contact Type Ahead field ContactInformation Contact Info used for testing purposes only. Specialty Fields 3 fsSpecialtyFields Project Template ProjectTemplate

Very long descriptions may be truncated. In those cases, you will need to open the field properties record to view complete details.

User Project

fkl IserProjectID

## Lookup Group

The **Lookup Group** field displays in the Lookup Settings fieldset when you select an **Element Type** of Lookup Type Ahead (core), Lookup (core), Lookup Multiple (core).

- If you have already added a lookup group to associate with this field: Select the lookup group from the drop down list.
- If you have not already added a lookup group to associate with this field: Click the down arrow and select *Add new item* to add the lookup group and populate the **Lookup Group** field with it.

**Note:** Once the Lookup Group field is populated, you can click the **Jump to Related Form** button in the field to open the lookup group record.

### Filter Value

The **Filter Value** field displays in the Lookup Settings fieldset when you select an **Element Type** of Lookup Type Ahead (core), Lookup (core), Lookup Multiple (core).

**Filter Value** allows you to filter the values in the specified **Lookup Group** by a single value. For instance, you are configuring a US States lookup group, you only want the list of values in it to contain southeastern states and you have set a filter of SE (for southeastern states) on the Lookup Details record of each of the southeastern states. In this scenario, users will see the following values when they open the US States drop-down list:

- States with a Filter value of SE entered on the Lookup Details record.
- States with a blank or empty **Filter** value.

See Basic field filtering: Using the lookup Filter and dataform field Filter Value

#### Filter Source

The **Filter Source** field displays in the Lookup Settings fieldset when you select an **Element Type** of Lookup Type Ahead (core), Lookup (core), Lookup Multiple (core).

**Filter Source** allows you to filter dynamically, restricting the range of values displayed in a lookup list based on a selected value in another lookup field on the same form. You must specify the actual field name of the field in **Filter Source** instead of the field label name (i.e., luRegion instead of Region) in the **Filter Source** field.

**Example:** I select "Southeast" from the **Region** drop-down list and the **US States** 

	drop-down list filters to display southeastern states.
	In this scenario, users will see the following values when they open the <b>US States</b> drop-down list:
	<ul> <li>States where this is there is a lookup for "Southeast" in the Region lookup detail configuration with a Code field value that matches the Filter value on the US States lookup detail configuration of the southeastern states. For example, SE displays in the Code field of the Region lookup detail configuration and SE displays in the Filter fields of the US States lookup details configuration records for the southeastern states.</li> <li>States with a blank or empty Filter value.</li> </ul>
	SeeAdvanced filtering: Using contents of another field and Filter Source
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).
Org Category	This setting is only available when the <b>Element Type</b> of the dataform field is Org Type Ahead. Selecting a value in this list filters the organization lookup list to organization records that match the specified category. <b>EX:</b> Brokers or Staffing.
Orgs with Workspaces	This setting is only available when the <b>Element Type</b> of the dataform field is Org Type Ahead. Setting this field filters the organization lookup list to organization records are associated with a workspace.
Advanced Client Info	This setting is only available when the <b>Element Type</b> of the dataform field is Org Type Ahead. This section is used enable settings to display additional workspace-specific information (if entered), such as making the <b>Client Number</b> , <b>PEOID</b> , and <b>DBA</b> display next to each value in the lookup list which can help users identify the correct company when there are similarly named companies in the list.
Advanced Settings	Used when there is a special script or special code entered in <b>Advanced Settings</b> for a dataform field. For instance, on the <b>Benefit Parent Company</b> field, there is code entered in <b>Advanced Settings</b> to filter the Org Type Ahead for this field to only display companies associated with a workspace and an Active Client Master record. Also see Configuring Your Dataform Datatypes.
Form	Is this one of the Search parameters available in a multiform list? This property can

Searchable	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.	
Include in Document Index	When selected, this option includes the dataform field when indexing documents attached to the form so that it can be used as part of the document search.	
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.	
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.	
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.	

System	When a developer user selects the <b>System</b> setting for a dataform field, a Global Admin user can edit the field but can not delete the field.  A Global Admin user can view the <b>System</b> setting, but only a developer user can change this option for a dataform field. If a developer user deselects the <b>System</b> option for a dataform field, the system displays a message before the user confirms the change to the dataform field:  This field is a system field that may be used in business logic. Making this field 'not system' may impact some functionality.
SortDescendi ng	If the field displays as the first column in a search list and the <b>SortDescending</b> check box for the field is checked, the system defaults the sort order to descending for the column. When this option is unchecked, the sort order for the column is ascending. <b>Note:</b> This feature only applies to multiform searches.

## 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
Ø	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 <b>z</b> Additionally, an error message may display and you may be prevented from continuing with the deletion of other dataform fields that are not system fields if the field is being used in other configurations that depend on the field. See Deleting or Inactivating Dataform Fields.
0	New	Adds a new field.
н	Save	Saves changes to the dataform fields list.
•	Visualize	Opens a preview of the dataform that illustrates how the fields display.

## **Related Topics:**

• Dataform and Dataform Field Security

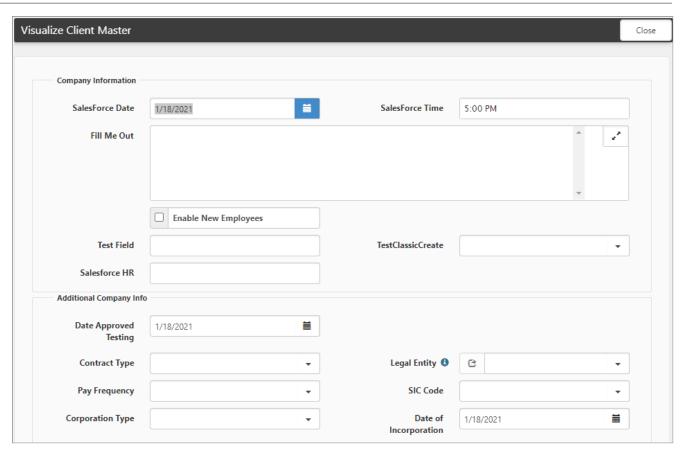
## Visualize: Previewing Dataform Fields

When you Open (Edit), Delete, and Add (New) fields on a dataform in **Dataform Admin**, you can use the **Visualize** tool to preview how the fields display for the current configuration of dataform You can use the Visualize preview to guide your dataform editing decisions when you are configuring the layout of the dataform.

### Use the Visualize tool to preview edits to dataform fields:

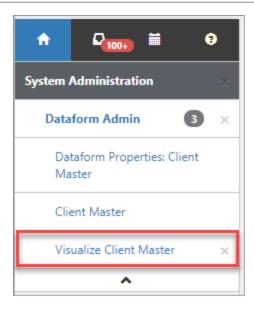
- 2. From the list, select an entry and click **Edit** or click **G** (**Jump**). The Dataform Properties form opens.
- In the Action Center, click Fields.
   The Fields list of the dataform displays.
- 4. Click the **Visualize** button from the toolbar.

The Visualize dataform field preview displays as a new visualize work item.



- 5. Select the dataform Work Item in the Work Center to return to the field list.

  The Fields list of the dataform displays. From here, you can Open (Edit), Delete, and Add (New) fields.
- 6. Click **Apply** when you are done.
- 7. Select the Visualize dataform Work Item in the Work Center to return to the Visualize dataform field preview. The preview will each time that you return to Visualize and the preview will show any changes to fields that you saved.



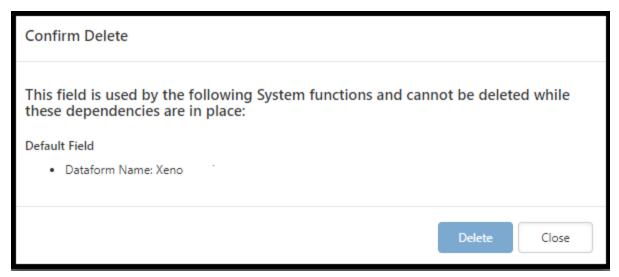
## **Deleting or Inactivating Dataform Fields**

You can delete or inactivate a dataform field that you do not want to use on a dataform anymore.

### **Situations Preventing Field Deletion or Inactivation**

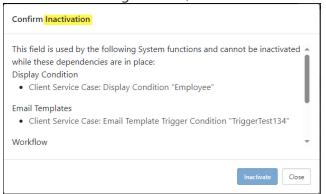
A few situations can exist that prevent a field from being deleted or inactivated. When this occurs, a Hard Error displays and you are not permitted to delete or inactivate the field:

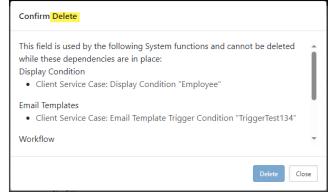
- The field is a **system field**. For system fields, the Delete action is not available and displays as disabled. System fields can be easily identified since their field names do not begin with **z**\_.
- The field is a **default field**. For default fields, the system displays a message.
   "This field is used by the following System functions and cannot be deleted while these dependencies are in place: Default Field <DataformName>"
   The following graphic illustrates this scenario:



To proceed with deleting the field you must first select a different field in the **Default Field** option for the indicated dataform.

• Other system configurations depend on the field. Dataform fields that are referenced by system functions cannot be removed. Examples of dependencies include display conditions, workflows, email templates, email integration configuration, and more. In the examples of delete and inactivation messages below, the bulleted list items are links to the dependencies.





You can click the link to continue to the dependency and remove the field from the system function. After removing the dependency, you can delete or inactivate the field.

## Warnings to Proceed with Caution

Other situations can exist where you can proceed with deleting or inactivating a field but the Soft Error message warns you to evaluate your settings before continuing:

• The field is a **secured field** referenced in a workflow condition, link condition, or email template condition. The system displays the following warning message. The system <u>will</u> allow you to proceed with deleting a secured field that is not referenced elsewhere or is referenced in a

### business parameter only by clicking **Delete** on the warning message.

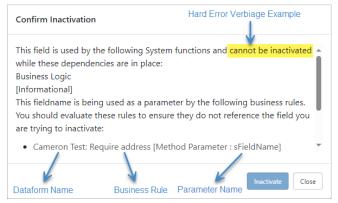


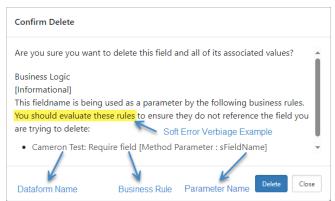


#### Business Rules: Soft and Hard Error Validation

Some business rules have hard error validation to prevent deletion or inactivation of a field while others have soft error validation that allows you to proceed but encourages you to evaluate the business rules first. Whether a hard error or soft error displays is determined by the **Rule Type** defined in the custom logic rule settings (**System Admin** > **Manage Rules**).

The messages always list the associated dataform, business rule and business rule method/parameter so that you can review the affected dataform, business rule and method before proceeding with the inactivation or deletion of a field. The bulleted list items shown in the message are links that take you directly to the related custom logic rule.



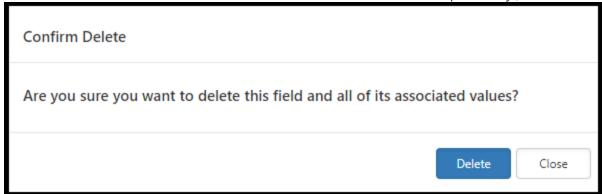


## **Deleting and Inactivating Dataform Fields**

### **Deleting a dataform field:**

- From the list, select an entry and click Edit or click (Jump).
   The Dataform Properties form opens.
- In the Action Center, click Fields.
   The Fields list of the dataform displays.
- 4. Review the list of fields for the dataform.

- 5. Select the row for the field to delete.
- 6. Select the **Delete** button in the toolbar.
- 7. Select **Delete** in the **Confirm Delete** window. (The message may vary depending on factors such as whether the field is a secured field and has been referenced as a dependency.)



8. Click **Close** to return to the Dataform Properties.

#### **Inactivating a dataform field:**

- 2. From the list, select an entry and click **Edit** or click **(Jump)**. The Dataform Properties form opens.
- In the Action Center, click Fields.
   The Fields list of the dataform displays.
- 4. Review the list of fields for the dataform.
- 5. Double-click the row of the field you want to inactivate. Field properties display.
- 6. In the **Settings** fieldset, uncheck the **Active** checkbox.
- 7. Click **Save**button.
- 8. Select **Inactivate** in the **Confirm Inactivation** window. (The message may vary depending on factors such as whether the field is a secured field and has been referenced as a dependency.)



9. Click **Close** to return to the field properties.

## Changing the Number of Decimal Places on a Dataform Field

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:

- 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 allowed before and after the decimal. **Example:** Insert 00.00 for a number that cannot exceed 99.99.
  - The following warning message displays: Changing a mask may result in permanent truncation of data. Are you sure you would like to continue?
  - **Note:** If you are performing a change such as reducing the number of places before or after the decimal, there is a risk of permanent truncation of data. Make certain that this is the change you want to make before saving.

- 6. Click **Yes** to continue.
- 7. 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:

- 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.

## **Related Topics:**

- Configuring Default Time Tracking for Task Categories
- Customizing Workflow: Adding and Editing Time Tracker Categories
- Using Time Tracking Categories

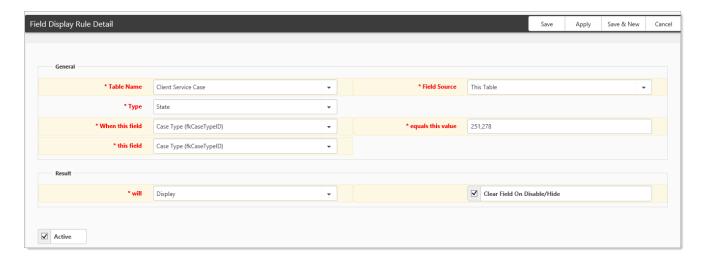
## Configuring field display with multiple values

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.

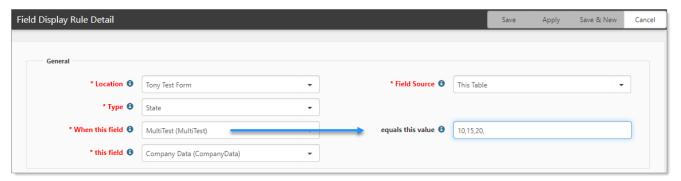
### **To configure Field Display:**

- 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.

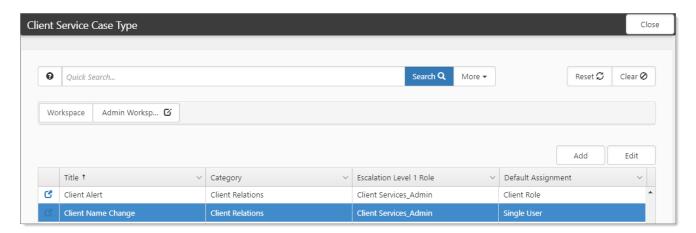


### How to determine values for a specific use case

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:

- Go to System Admin > Administrative Data > Client Service Case Type.
   The Client Service Case Type dashboard opens.
- 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.

- 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

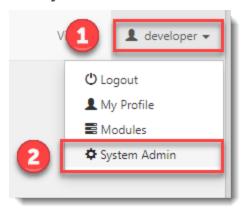
The **Multi Col** column enables administrators with the advanced license to configure the columns in a module for multi dataforms, single dataforms, and tabbed sets. If **Multi Col** is not configured, you may encounter the following error on a search page or dashboard:

"Grid columns have not been configured for this search page".

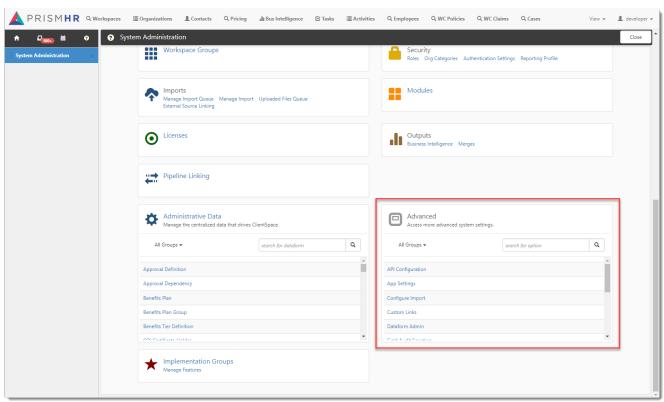
The steps outlined in this article will fix the error.

## To access the administrative area of ClientSpace:

- 1. Click your username in the top right corner of the ClientSpace window. EX: developer
- 2. Click **System Admin**.

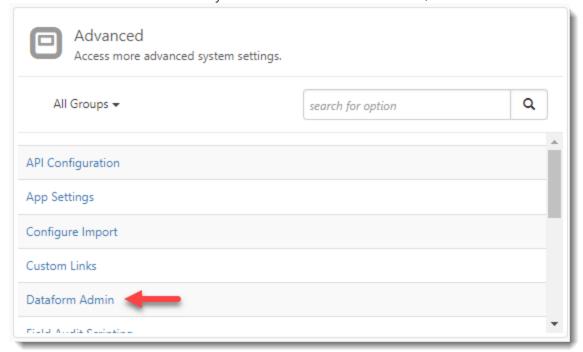


The System Administration dashboard opens. The Advanced system settings box is located in the bottom right corner.



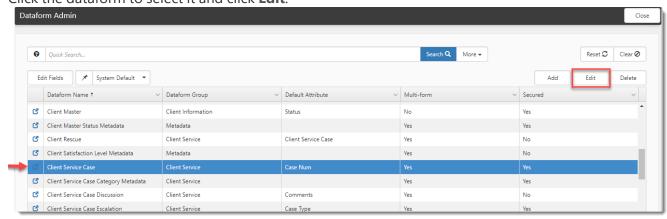
#### To define the multiform list column headers:

1. In the Advanced section of the System Administration dashboard, click **Dataform Admin**.



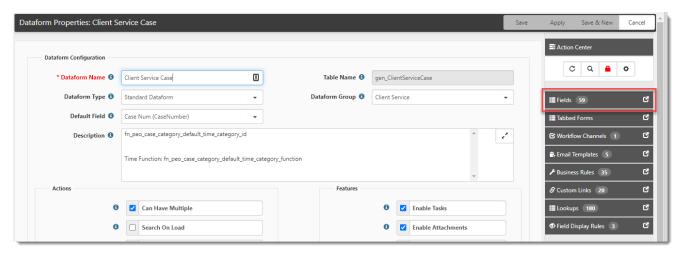
The Dataform Admin dashboard opens.

2. Click the dataform to select it and click Edit.



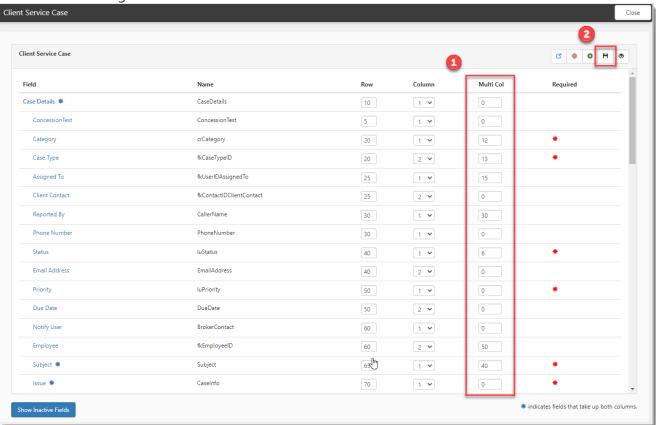
The Dataform Properties form opens.

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. Type the numeric values in the **Multi Col** column for the fields you would like to see displayed in the list in ascending order.



5. Save your changes.

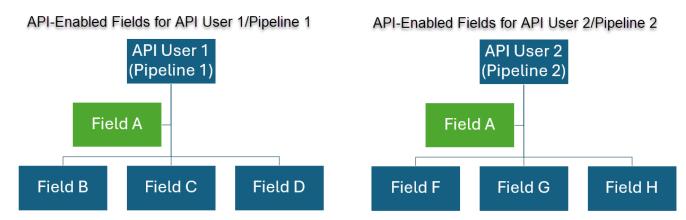
#### Note:

- For newly created dataforms, your first column in the search module will default to the name of the Workspace.
- For dataforms that are out-of-the-box, the first columns in the search module may not be configurable.

## Configuring API-Enabled Fields

Global Administrators can define required fields for an API by API User. This allows each API user (i.e., consumer) of the API to have their own definition of the required fields for the dataform without impacting an API user who is running on a different pipeline.

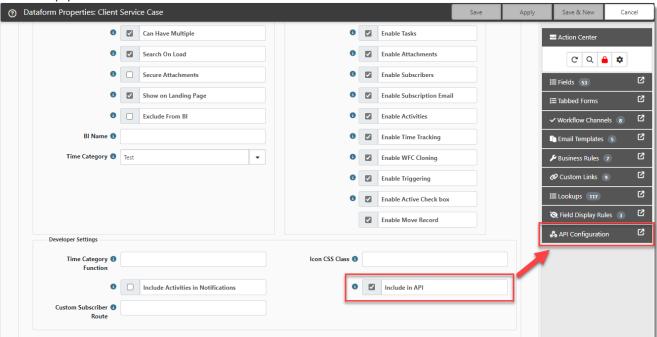
You can set up distinct groupings of required fields for each API User (**System Admin** > **Advanced** > **API Users**) only if the API User record is configured with a unique pipeline (which is our recommended best practice). Then, when you associate a group of fields with the pipeline of API User 1, for instance, you can also associate another group of fields with the pipeline of API User 2 and have some of those fields be the same as or different from those associated with API User 1. This is illustrated in the diagram below:



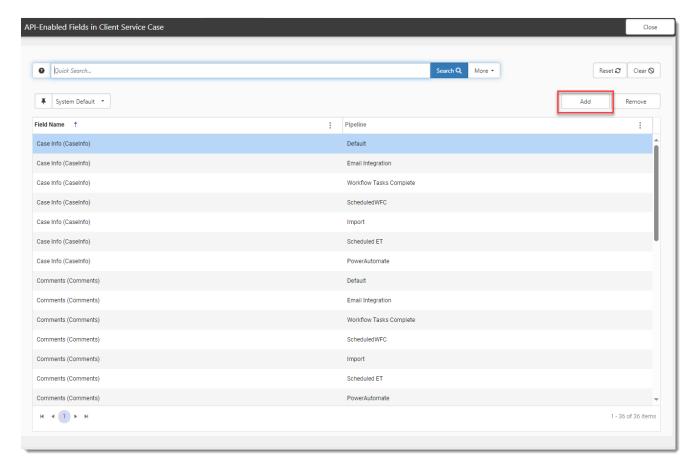
#### To configure API-enabled fields:

- Go to System Admin → > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- 2. Locate the API-enabled dataform and then click (Open) next to the dataform name. The Dataform Properties form opens.

**Note:** To make a dataform API-enabled, click the **Include in API** checkbox on the Dataform Properties. This setting enables the **API Configuration** link that we will be using to associate fields to pipelines.



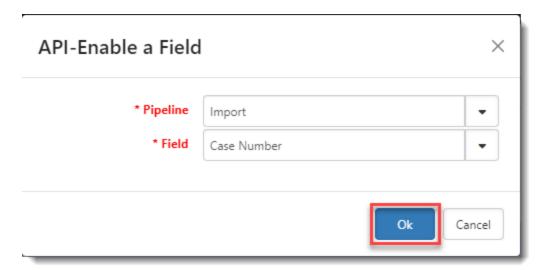
3. Click **API Configuration** in the Action Center. The API-Enabled Fields window displays.



#### 4. Click Add.

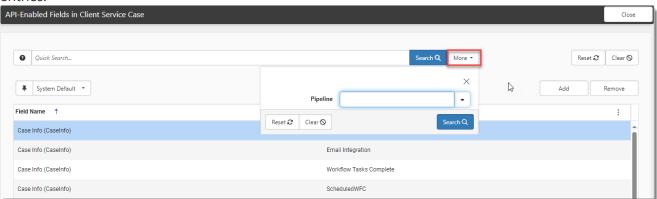
The API-Enable a Field window displays.

- 5. Select the **Pipeline**. (This should match the pipeline of the API User record which coincides with the group of required API-enabled fields you are now configuring.)
- 6. Then, select the Field and click OK.



7. Continue adding API-enabled fields for this form (which match the pipeline of the API User record) until you have defined the form for the API User.

**Note:** When you are finished, you can conduct a **More** search to filter by pipeline and verify your entries.



# **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
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.

TypeName	Explanation of Datatype
Checkbox	True/False (bit). Presents the user with a check box (option). Defaults to unchecked (cleared).
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.
	<b>Note:</b> You can filter contact types by using the <b>Contact Category</b> filter option in the <b>Contact Settings</b> field set when you add or edit a field on a dataform. Add lookups using the CRMContactCategory lookup group to create multiple values to filter on.
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.
Date Time	Displays the full date and time in one field.
	Note the following regarding <b>Date Time</b> field data entry:
	• If the user does not set a time in a <b>Date Time</b> field, the time defaults to 00:00:00 unless the <b>Default to Current Date and Time</b> setting in dataform field configuration has been set (which will result in the current date and time being auto-filled in the field.)
	<ul> <li>Date Time fields accept date/time shortcuts. The valid codes are t = today, mm = minute, h = hour, d = day, w = week, m = month, and y = year. Examples: t (current date/time), 1w (plus 1 week), 3d (plus 3 days), - 1d (minus 1 day), -1h (minus one hour), or 15mm (plus 15 minutes).</li> <li>If the user enters t (today), the computer's system date and time are used to populate the field with the current date and time.</li> </ul>
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.
Editor	Rich text control. Similar to a text area, but with formatting.
Email	Text field. Checks for a valid format of the email address.

TypeName	Explanation of Datatype
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.
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.
Image	Attach an image file.
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.
Link	Text field with hyperlink control attached. <b>CAUTION</b> : The hyperlink control always attaches the HTTP protocol before a URL is stored in this field and can result in protocol doubling up.
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. <b>Only works on the Location form</b>
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).
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 <b>!.!</b> . See Configuring lookups.
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.

TypeName	Explanation of Datatype
Org Contact	List of contacts for the Org attached to the workspace.  Note: You can filter contact types by using the Contact Category filter option in the Contact Settings field set when you add or edit a field on a dataform. Add lookups using the CRMContactCategory lookup group to
	create multiple values to filter on.
Org Contact (Field Related)	List of contacts for an Org referenced in an Organization field on the dataform.  Note: You can filter contact types by using the Contact Category filter option in the Contact Settings field set when you add or edit a field on a
	dataform. Add lookups using the CRMContactCategory lookup group to create multiple values to filter on.

TypeName	Explanation of Datatype	
Org Type Ahead	Typeahead field that performs auto-complete foreign key to Organization record. <b>Note</b> : You can filter organizations by the <b>Category</b> field when configuring this datatype. You filter for organizations with an active Client Master by using the <b>ActiveClientMaster</b> filter on this datatype. This is done from <b>Advanced Settings</b> on the field properties.	
	Access the <b>Advanced Settings</b> by going to <b>System Admin</b> > <b>Advanced</b> > <b>Dataform Admin</b> , select the dataform and then double-click the field to access field properties. Click <b>Advanced Settings</b> and set <b>ActiveClientMaster</b> to 1 to enable the filter. Setting the property to 0 removes the filter.	
	Advanced Settings	
	{"UserID <u>":null,"Category":null,"RequireWS":1,"AdvancedClientInfo":1,"ActiveClientMaster":1</u> }	* ***
	Save	Cano
	Note: When configuring Advanced Settings, be careful of syntax:	
	<ul> <li>Properties should contain no spaces and be closed in quotation marks.</li> <li>Multiple properties should by separated by a comma (no spaces).</li> <li>The entire string should begin with a left curly brace { and end with a</li> </ul>	
	right curly brace }.	
Parent Form	Integer field contains custom logic to tie it to a parent dataform. For more information see Configuring parent form datatypes.	
Percent	Decimal (14,2). Formatted as a percent.	

TypeName	Explanation of Datatype
Phone	By default, this is a text field formatted as phone number: ### - ####.  When you check the <b>Allow International Phone Numbers</b> checkbox, the input mask is removed to allow entry of international phone numbers.
	Note:
	<ul> <li>The Allow International Phone Numbers checkbox setting does not impact Phone datatype fields on CRM forms (i.e., Contact and Organizations) as these forms are treated differently in the system. To allow international phone number entry on these forms, the Allow International Phone Numbers on CRM forms checkbox must be checked in App Settings (System Admin &gt; Advanced &gt; App Settings).</li> <li>Only Developer Users can access App Settings. If you need this feature, please contact your ClientSpace representative or log an extranet ticket.</li> </ul>
Project User	List of active users for the workspace the form resides on
Project User Type Ahead	Typeahead list of users associated with the workspace in which you are currently working.

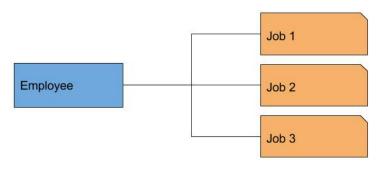
TypeName	<b>Explanation of Datatype</b>
SSN	By default, the text is formatted as SSN ### - ## - ###. However, a security mask (xxx-xx-####) is also automatically applied when a user opens a form with an existing SSN or types an SSN into a field.
	An eye button mask entity is also created for each SSN datatype field: <dataform>.<fieldname>.Mask. This is separate from and in addition to the standard SSN field security entity.</fieldname></dataform>
	Example: gen_Employees.SSN.Mask
	This entity enables a <b>View/Hide</b> (i.e., eye) button next to the SSN. This serves as a toggle switch to remove the mask for temporary viewing of the complete SSN
	and to reapply the mask .
	Example:
	SSN XXX-XX-6789
	Note:
	<ul> <li>Although the eye button mask entity is automatically created when new SSN datatype fields are created, it is not assigned. You must manually assign it to roles with View rights if you want those roles to have access to the eye button.</li> </ul>
	<ul> <li>If you do not assign the eye button mask entity, the SSN mask will still be applied but users without the eye button cannot remove the mask to view the complete SSN.</li> </ul>
	The security mask is applied to both accessible and "read only" fields.
	<ul> <li>If a field is disabled by a field display setting and the eye button mask entity is applied, the eye button still displays but is disabled.</li> </ul>
	<ul> <li>On an accessible field, if you try to edit an SSN by backspacing over any part of it, the entire value clears and you must re-enter the SSN.</li> </ul>
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.
Text-Wide	Wide text area. Takes two columns on form.

TypeName	Explanation of Datatype
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.
Time - Standard	Text field formatted to accept standard time (9:40pm).
User	Integer. List of all active users in ClientSpace. The primary key of the user record is stored in the integer field.
UserByEntityTypeAh ead	Typeahead List of users filtered by Security Entity (Entity configured in the <b>Advanced Settings</b> property of the dataform field).
User by Role Type Ahead	Typeahead list of users filtered by role entered in the <b>Advanced Settings</b> property of the dataform field.
User Filtered By Entity	List of users filtered by Security Entity (Entity configured in the <b>Advanced Settings</b> property of the dataform field).
User Filtered By Entity Type Ahead	Text box. Uses typeahead functionality to select available users filtered by a security entity.
User Filtered By Role	List of users filtered by associated RoleID entered in the <b>Advanced Settings</b> property of the dataform field.
User Multiple Select	Allows for the selection of multiple users from a pop-up.
User Project	A list of the projects the user has access to.
User Type Ahead	Typeahead list of users.
WC Policy	List of Workers' Comp Policies. Use the <b>Advanced Settings</b> property to filter the list of policies. For example, enter {"CompModel":"Master", "ExcludePolicyStatus": "Expired"} to display policies with a Master policy type and to exclude expired policies.
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.

### 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

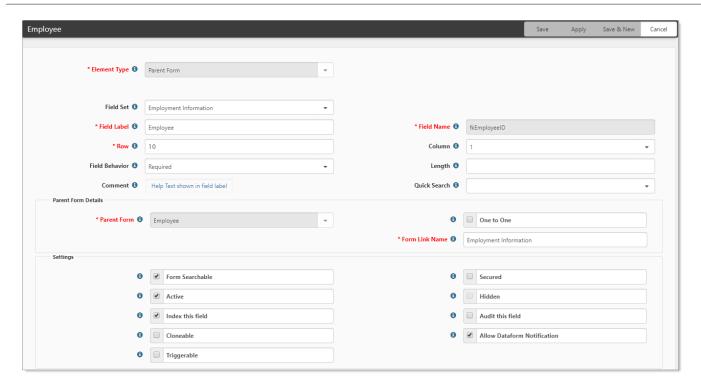


employee's history, pay grade changes, and reasons for termination. The person is the same but the job changes.

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:

- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- 2. Open **Employment**.

The Dataform Properties: Employment form opens.

- 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. <b>Parent Form</b> 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 <b>Employee</b> makes sense.
Field Name	This is the column name for this field as it is stored in the database.  On these parent form datatype fields, the system stores the ID of the parent

Field	Description
	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 <b>fk</b> (foreign key) <b>Employee</b> (dataform name) ID or <b>fkEmployeeID</b> .
	As a best practice, use camel case for the Field name. Begin with lowercase to indicate datatype (such as <b>fk</b> for foreign key or <b>lu</b> 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	<ul> <li>When ReadOnly is selected, the field cannot be edited.</li> <li>When Required is selected, the field must be completed before you can save the dataform unless the field is in a hidden fieldset.</li> </ul>
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 <b>Parent Form</b> data type. When this data type is selected, the related form fields are enabled ( <b>One to One</b> and <b>Form Link Name</b> ), allowing you to define the relationship.
	The Parent Form is selected from the list of all dataforms because the relational field is placed on the child form. Recursive relationships where a

Field	Description
	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	<ul> <li>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.</li> <li>If One to One is enabled (selected), the link to the child form from the parent presents the child form directly.</li> <li>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.</li> </ul>
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 <b>gen_TableName_FieldName</b> .
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.
Include in Document Index	When selected, this option includes the dataform field when indexing documents attached to the form so that it can be used as part of the document search.
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 email.

Field	Description
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 **Advanced Settings** property of the dataform field settings by using the **ROWCOUNT** command. Records can also be brought in from a different workspace using the **Advanced Settings** section as well by adding the partial **GUID** of the workspace.

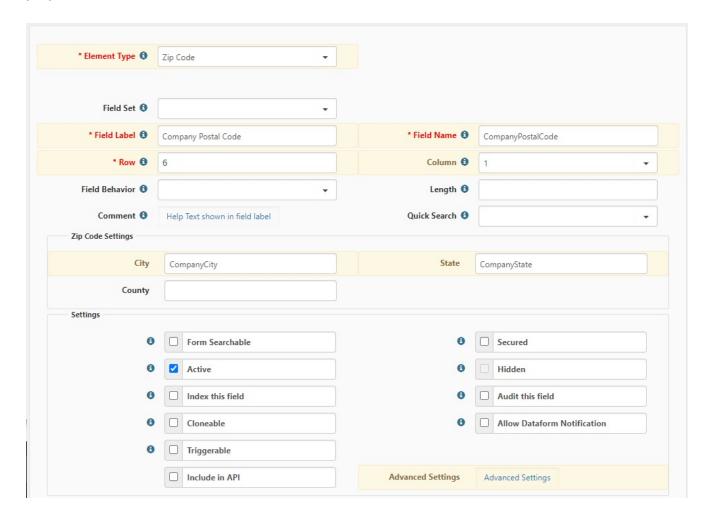
For example, to have a threshold of 50 records and to bring in records from a workspace with the partial GUID 'ce3d5dee' as well as the current workspace, you would add **ROWCOUNT=50;ce3d5dee;CURRENT** to the **Advanced Settings** property of the dataform field settings.

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 **Advanced Settings** 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 **Advanced Settings** properties of the dataform field.



#### 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.

# Dataform and Dataform Field Security

In this topic, we will show you how to:

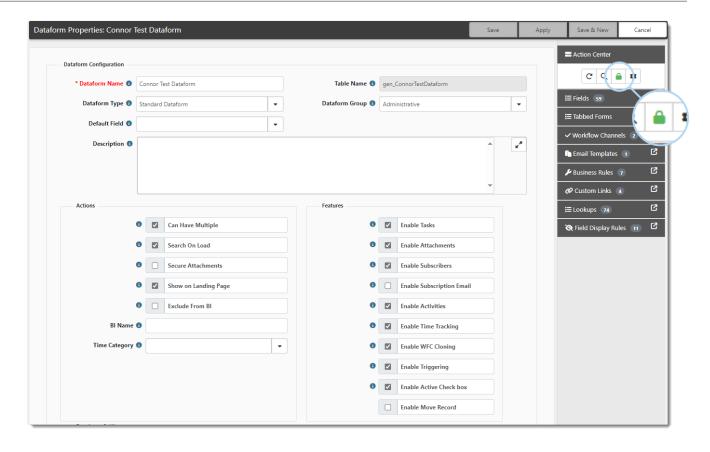
- · Set dataform level security
- Set dataform field level or fieldset level security
- Grant access to a secured dataform, field or fieldset

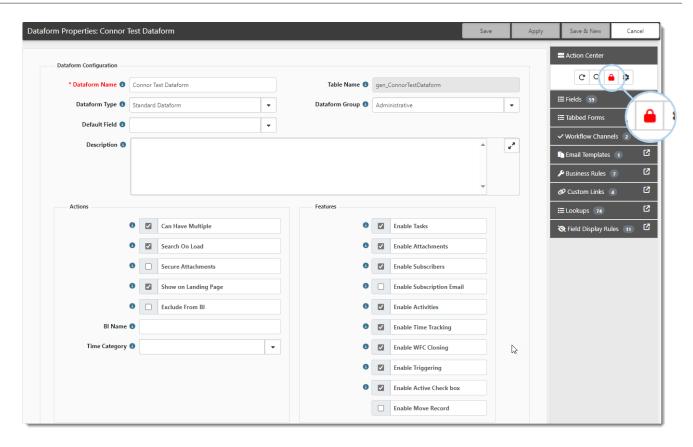
### **Setting Dataform Level Security**

### To set dataform level security:

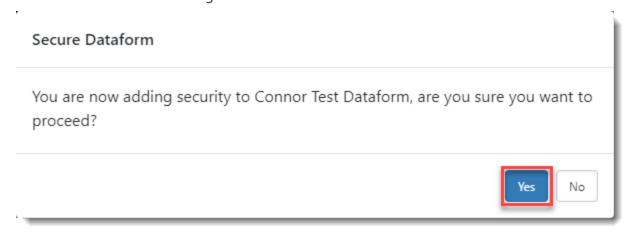
- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- 2. Open the desired dataform by either clicking (Open) next to the **Dataform Name** in the grid or by double-clicking the line item of the dataform in the grid.

The Dataform Properties form opens. On the Action Center toolbar, a green lock indicates that the form is <u>not</u> secured. A red lock indicates that the form <u>is</u> secured.

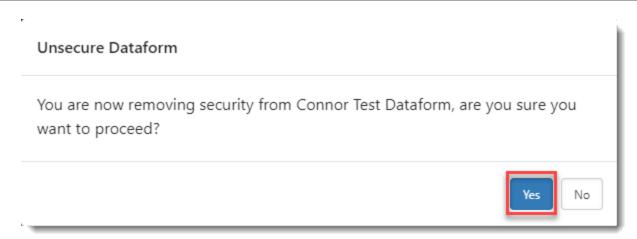




- 3. What do you want to do?
  - To add security to the dataform: Click the green lock icon. Then, click Yes on the Secure dataform confirmation message:



• To remove security from the dataform: Click red lock icon. Then, click Yes on the Unsecure dataform confirmation message:



4. Click Save.

### Setting Dataform Field or Fieldset Level Security

### To set dataform field or fieldset level security:

- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Open the desired dataform by either clicking (Open) next to the Dataform Name in the grid or by double-clicking the line item of the dataform in the grid.
   The Dataform Properties form opens.
- In the Action Center, click Fields.
   The list of fields and fieldsets on the dataform are displayed.
- 4. Double-click the field or fieldset you want to secure. This displays the field or fieldset properties.
- 5. In the **Settings** fieldset, click the **Secured** checkbox to add field or fieldset security.

  This creates a security entity for the field or fieldset using the following format: gen\_tablename\_fieldname or gen\_tablename\_fieldsetname. A user must be assigned a minimum of View rights to the security entity for a field or fieldset to appear on the form. To edit the field (or fields within a fieldset), the user must be assigned Edit rights.

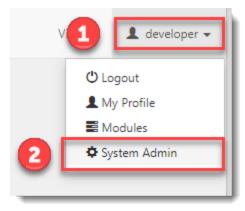
**Note:** See Security topics for general guidance on administering security. Also see Configuring Organization and Workspace Security for more information on security inheritance (or hierarchical security) in ClientSpace.

### Granting Access to a Secured Dataform, Field or Fieldset

**Note:** This section is a quick tutorial on how to edit existing roles to add the new security entity you created. This allows users to access a dataform or dataform field/fieldset that you have secured. For complete details on administering security, review all of the topics in the Security section, including Administering role security.

#### To grant access to a secured dataform, field, or fieldset:

- 1. Click your username in the top right corner of the ClientSpace window. EX: developer
- 2. Click **System Admin**.

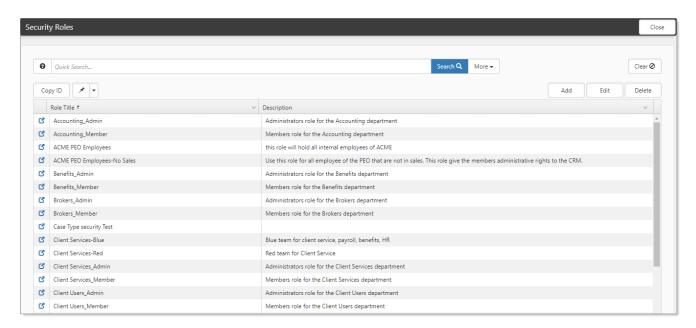


3. Go to Security > Roles.

The **Security Roles** dashboard opens.

4. Click (Open) next to the role that you will configure to have access to the secured dataform, field or fieldset.

**Tip:** Type the Wildcard (%) Search symbol followed by several characters contained in the security role name to help you quickly locate the security entity. **Example:** %Service Case

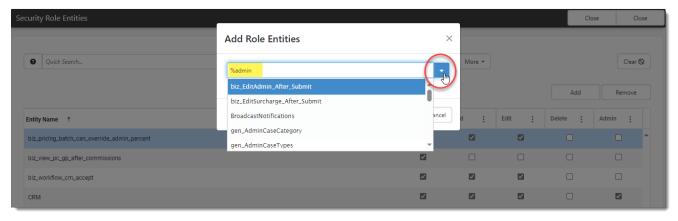


- 5. In the Action Center, click **Entities** to view Security Role Entities.
- 6. Click Add.

The Add Role Entities window displays.

7. Select the security entity for the dataform, dataform fieldset, or dataform field.

**Tip:** Type the Wildcard (%) Search symbol followed by several characters contained in the security entity name to help you quickly locate the security entity.



8. Add the appropriate View, Add, Edit, Delete, and Admin rights to the entity for the role.

**Note:** Saving is not required. The settings are automatically applied.

### **Related Topics:**

- Dataform Properties
- Distributing your dataform: Making dataforms accessible
- Configuring a Dataform to open as a Module
- Configuring Dataform fields
- Security

## 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 required field (or a tab that contains a required field) that should be completed.

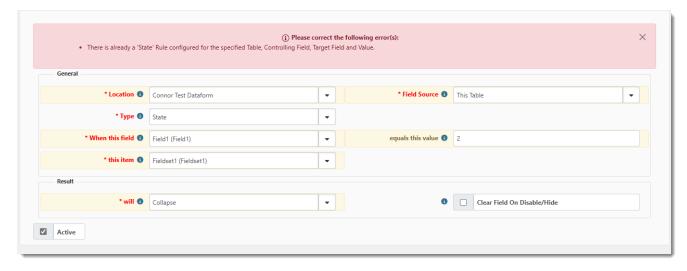
### Field Display Validation

Validation for conflicts is in place to ensure that the target field does not already have a field display rule set up with a conflicting behavior. For instance, if a previous rule was set up to expand a fieldset and another rule that references the same **Type**, **Field Source**, controlling field (i.e., **When this field**),

value (i.e., **equals this value**), and target field (i.e., **this item**) is set up to collapse the same fieldset on the same dataform, an error message similar to the following displays:

"There is already a 'State' Rule configured for the specified Table, Controlling Field, Target Field and Value."

This is illustrated in the image below:



The following ten behaviors are validated for conflicts:

is validated to check for this conflicting behavior
Display
Expand
Collapse
Hide
Enable
Disable
Collapse
Expand

## Field Display Configuration

To configure and manage dynamic field display:

1. Go to **System Admin > Advanced > Manage Field Display**.

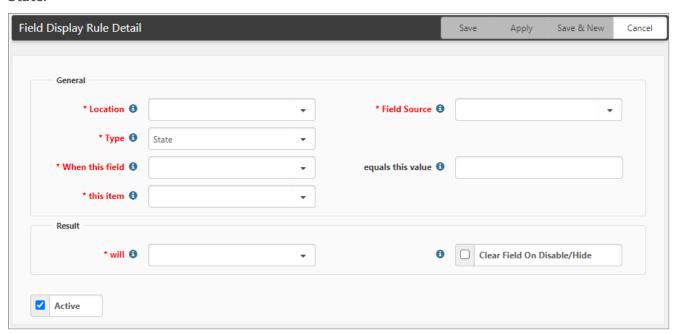
The Field Display Rule Search dashboard opens. It is helpful to filter the presented list for the

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.

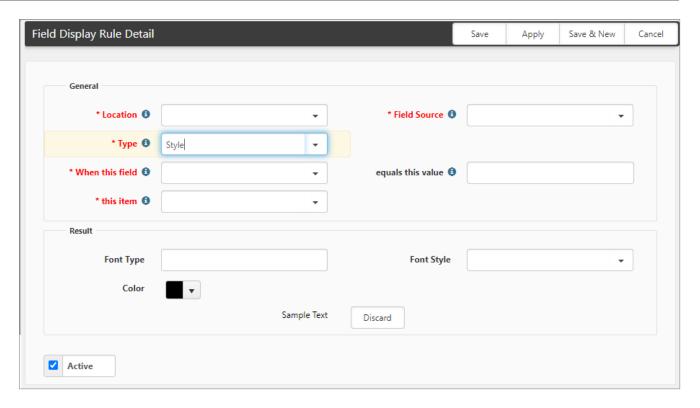
### 2. When ready, click **Add**.

The Field Display Rule Detail form opens. This form provides a number of configuration options to customize your field display.

The following graphic illustrates the **Field Display Rule Detail** form when the **Type** field contains **State**.



The following graphic illustrates the **Field Display Rule Detail** form when the **Type** field contains **Style**.



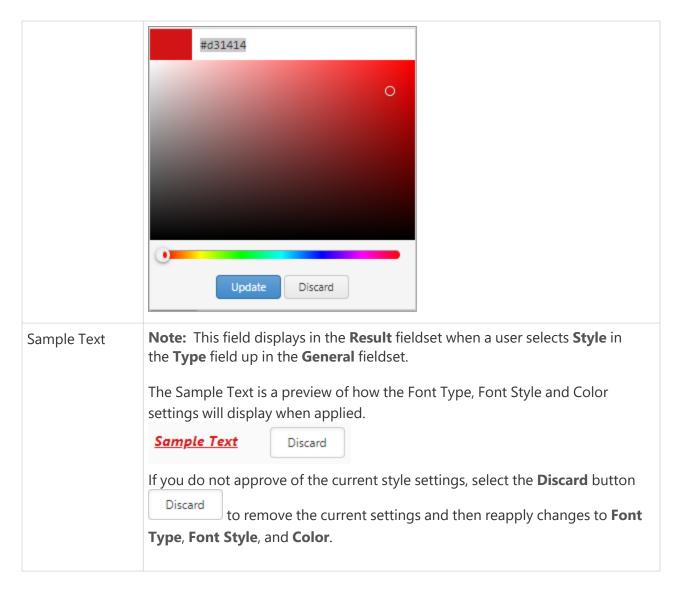
### 3. Complete the form:

<b>General</b> (fieldset)	
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	<ul> <li>Required. Select one of the following:</li> <li>This Table: Indicates your field source is from the Location field (such as a dataform).</li> <li>Field Display Proc 1: Indicates your field source is from a custom stored procedure.</li> <li>Field Display Proc 2: Indicates your field source is from a custom stored procedure.</li> </ul> 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.
Туре	Required. Determines whether this is a field display change that affects <b>State</b> or <b>Styling</b> :
	• State: Field interaction. Visibility / read-only attributes (default).
	<ul> <li>When you select State, the will and Clear Field On Disable/Hide fields display in the Result fieldset.</li> </ul>
	<ul> <li>Style: Sets CSS Styling changes to the field label based on a specific triggering condition.</li> </ul>
	<ul> <li>When you select Style, the Font Type, Font Style, Color, and Sample Text fields display in the Result fieldset.</li> </ul>
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 <b>When this field</b> . 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 set the triggering value to <b>#Empty</b> or <b>#NotEmpty</b> to trigger the field display rule when the triggering field is empty (i.e., blank) or not empty (i.e., populated).
	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 <b>equals this value</b> 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.

Result (fieldset)	
will	Note: This field only applies to Type of <b>State</b> .
	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.
	<ul> <li>Expand: Displays all fields within a fieldset. This can cue a user that one or more fields in the fieldset will require consideration based on a user's selection or action. The user can still click the chevron to collapse it again.</li> <li>Collapse: Hides all fields within a fieldset. This can cue a user that the fields in the fieldset can be ignored based on a user's selection or action. The user can still click the chevron to expand it again.</li> </ul>
	Note:
	• If you set a field display rule to hide a required field or hide a tab that contains a required field, ClientSpace does not enforce the required field when the rule hides the field or tab. Also, the system does not create a copy of a hidden tabbed dataform when a user adds a new dataform that contains that hidden tabbed form.
	<ul> <li>Dynamic field display Expand/Collapse rules on fieldsets always supersede any default Expand/Collapse settings created on fieldsets in Dataform Administration.</li> </ul>
	<ul> <li>If you apply a dynamic field display Expand/Collapse rule on a fieldset that has <u>no</u> Expand/Collapse settings configured on the fieldset in the Dataform Administration, the fieldset will necessarily become an Expand/Collapse fieldset and display the chevron.</li> </ul>
	<ul> <li>Expand/Collapse rules may only applied to fieldsets - not to individual fields.</li> </ul>
Clear Field On Disable/Hide	<b>Note:</b> This field displays in the <b>Result</b> fieldset when a user selects <b>State</b> in the <b>Type</b> field up in the <b>General</b> fieldset.
	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 <b>When this field</b> .
<b>Note:</b> This field displays in the <b>Result</b> fieldset when a user selects <b>Style</b> in the <b>Type</b> field up in the <b>General</b> fieldset.
Select one or more of the following options:
Normal
• Bold
• Underline
• Italic
<b>Note:</b> This field displays in the <b>Result</b> fieldset when a user selects <b>Style</b> in the <b>Type</b> field up in the <b>General</b> fieldset.
Select one of the following options:
• Normal
• Small
• Large
<b>Note:</b> This field displays in the <b>Result</b> fieldset when a user selects <b>Style</b> in the <b>Type</b> field up in the <b>General</b> fieldset.
Select the color picker drop-down to select a color or to enter a color
hex value (for example, #d31414). Click <b>Update</b> to apply the color, or click Discard to close the color picker.



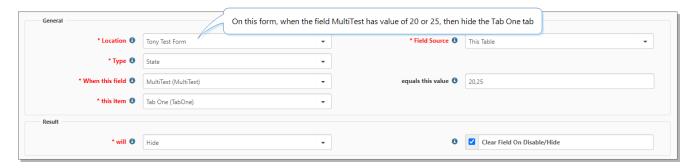
4. After you have configured all the field display options, click **Save**.

### **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.
- 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.

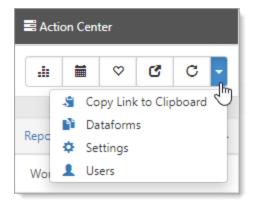
### Adding a dataform to a workspace

#### To add a dataform to a workspace:

 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.

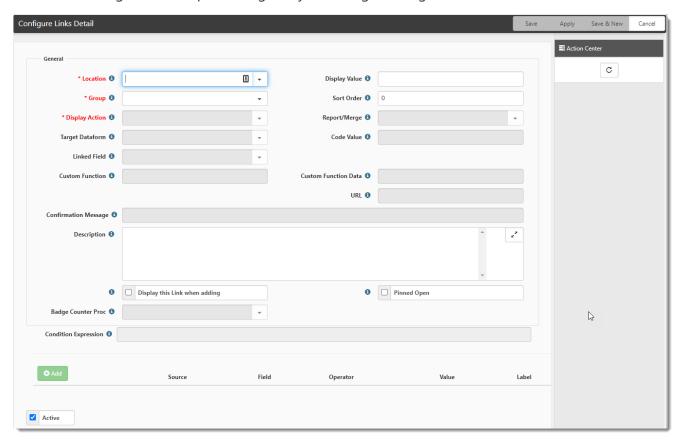
The dataform is added to all child workspaces of that template.

### 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 Custom Dataform Links . This topic discusses the link configuration items to create a Workspace Dataform link.

#### To add a new link to the dataform:

- Go to System Admin → > Advanced > Custom Links.
   The Configure Links dashboard opens.
- 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.
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 Custom Dataform 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. 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. To add link security, click the **Security** icon in the Action Center to access the Security Roles window where you can add one or more roles and secure the custom link to unlimited roles. For details on how to configure link security, see Configuring Link Security.
- 6. After configuring the Dataform Link, remember to **Save** your changes.

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

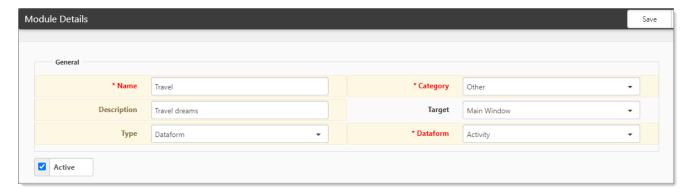
## Configuring a Dataform to open as a Module

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:

- 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.
Туре	Select <b>Dataform</b> . 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:

- 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

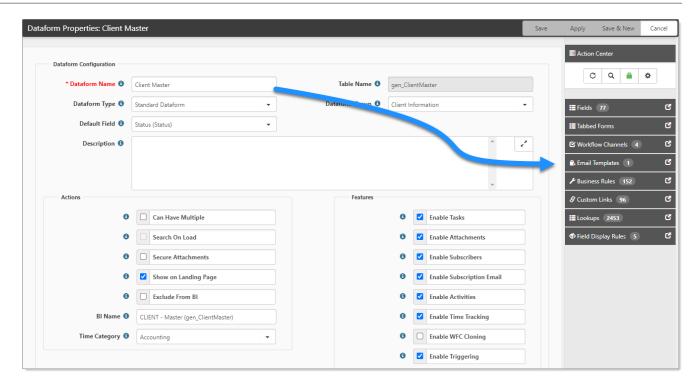
While administering dataforms, you can view dataform fields and related items from the Action Center. This information can help you avoid deleting items that are essential, such as triggers and rules. The following items appear in the Action Center with a badge count to indicate the quantity:

- 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.

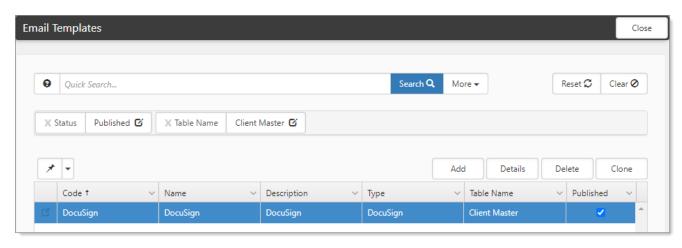
#### To view the related items:

- 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.



Video

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

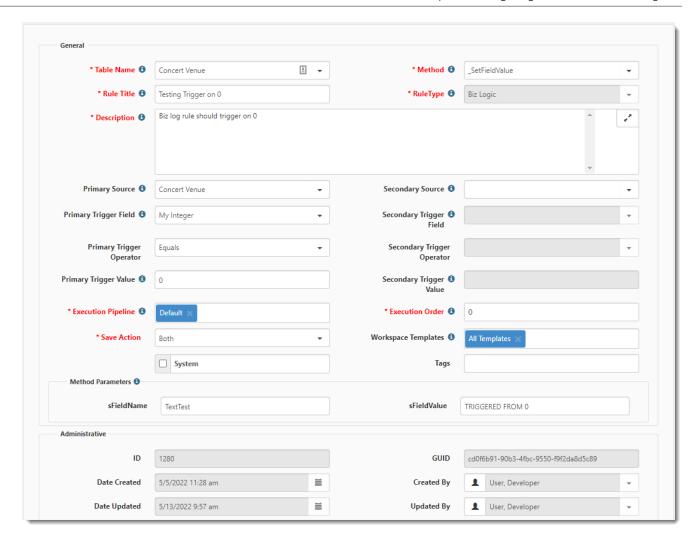
## Configuring Rules and Business Logic

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:

- 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. Also see Business Rule Methods.
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.
Descriptio n	Provide a more thorough explanation of what this rule is to accomplish.

Primary Source	Select the dataform or tabbed child form to use as the source for the primary trigger evaluation.  Note: To save a <b>Primary Source</b> field value, you must select a corresponding
	trigger field, operator, and value. If you do not, the source value clears upon saving.
Secondary Source	Select the dataform, tabbed child form, Server Data Proc 1 (SDP1) or Server Data Proc 2 (SDP2) to use as the source for the secondary trigger evaluation, if applicable.  Note: To save a Secondary Source field value, you must select a corresponding trigger field, operator, and value. If you do not, the source value clears upon saving.
Primary Trigger Field	Select or type the name of the field that is going to cause the change. This field is a lookup of all the fields on the specified Primary Source form.
Secondary Trigger Field	Select or type the field name of an additional trigger condition that must be met if necessary. This field is a lookup of all the fields on the specified Secondary Source form. The lookup may include Server Data Proc 1 (SDP1) and Server Data Proc 2 (SDP2) fields. The fields appear at the bottom of the <b>Secondary Trigger Field</b> drop down list prefaced with SDP1 or SDP2.
	<b>Note:</b> Not all organizations will have SDP2 fields displayed in the list. The Server Data Procs are stored procedures that allow you to access and add fields on one dataform that reside on a different dataform. SDP1 is typically set up in the implementation phase for all customers to provide access to some fields that we feel may be helpful to most organizations. SDP2 fields are only present if custom development was requested from Professional Services that required additional access to fields.
Primary Trigger Operator Secondary Trigger Operator	<ul> <li>Select the operator datatype. The following operators apply to their respective datatypes:</li> <li>Contains: Text</li> <li>Does Not Equal: Text, Integer, Date, DateTime, Lookup, User, Parent</li> <li>Empty: Text, Integer, Date, DateTime, Lookup, User, Parent</li> <li>Equals: Text, Integer, Date, DateTime, Lookup, User, Parent, XML</li> </ul>
	<ul> <li>Greater Than: Text, Integer, Date, DateTime, User</li> <li>Greater Than or Equal: Text, Integer, Date, DateTime, User</li> <li>Is Dirty: Text, Integer, Date, DateTime, Lookup, User, Parent</li> </ul>
	<ul> <li>Is Dirty And Is Empty: Text, Integer, Date, DateTime, Lookup, User, Parent.</li> <li>Executes if the <b>Trigger Field</b> on this form has changed and is now empty.</li> </ul>

- Is Dirty And Is Not Empty: Text, Integer, Date, DateTime, Lookup, User, Parent.
   Executes if the Trigger Field on this form has changed and now contains a value.
- Less Than: Text, Integer, Date, DateTime, User
- Less Than or Equal: Text, Integer, Date, DateTime, User
- Not Empty: Text, Integer, Date, DateTime, Lookup, User, Parent
- · Starts With: Text
- Org, Contact, and some other special fields present as an integer and share those operators

#### Note:

- If you are selecting an SDP1 or SDP2 field as the **Secondary Trigger Field**, be aware that the system cannot identify the datatype of an SDP1 or SDP2 field and therefore, cannot filter the **Secondary Trigger Operator** field to only show applicable operators for the datatype (as it currently does for regular form fields). You must evaluate the field's datatype and select a valid operator that applies to its respective datatype.
- Is Dirty, Is Dirty And Is Empty, and Is Dirty And Is Not Empty are not available options for SDP fields.

## Primary Trigger Value Secondary Trigger Value

Type or select a value to be met as a triggering condition.

**Note:** Primary and Secondary trigger values are selectable from a drop down list when the associated Primary or Secondary trigger field is a HdrAction or a Lookup. 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:

- **#CurrentUser:** Allows you to trigger a rule when the logged in user (i.e., current user) matches the user selected user in the Trigger Field.
- **#CurrentDepartment:** Allows you to trigger a rule when the logged in user's default department on their user profile matches the default department on the user profile of the selected user in the Trigger Field.

#### Note:

- To use #Current User or #CurrentDepartment, the Trigger Operator must be
   Equals or Does Not Equal and the Trigger Field must be a valid user data type
   of Project User, Project User Type Ahead, User, User by Role Type Ahead, User
   Filtered By Entity, User Filtered By Entity Type Ahead, User Filtered By Role, or
   User Type Ahead.
- For #CurrentDepartment, if either the logged in user's default department on their user profile is not set or the default department on the user profile of the selected user in the Trigger Field is not set, the rule will not trigger. The default department must be present on <u>both</u> user profiles for this Trigger Value to work.

## Execution Pipeline

This is typically set to **Default** but can be changed to include other pipelines in addition to the default pipeline. The default pipeline indicates that the rule will be applied when data entered in the system is saved. If, for example, you want a rule to execute on data manually entered into the system and on data imported into the system, you would select **Default** and **Imports** as pipelines for that business rule.

Select **All Pipelines** as the **Execution Pipeline** when you want to apply a "catch all" to always trigger the rule. Only use this when it is truly applicable.

**Example:** If it is true that no matter how a new case is created, a case number should <u>always</u> be generated, you can set the **Execution Pipeline** field to **All Pipelines**.

Selecting **All Pipelines** results in a warning message similar to the following displaying. You must click **Continue** to acknowledge the warning and apply the selection.

#### WARNING:

Selecting All Pipelines will add this rule to all pipelines. All will include any new pipelines that are created as well. Please review the list of current pipelines below to make sure you want this to fire every time a pipeline triggers.

Default

**Email Integration** 

Import

Patrick

**PowerAutomate** 

ScheduledWFC

Workflow Tasks Complete

Continue

#### **Notes on Pipeline Linking:**

- If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new rule, pipelines assigned a behavior of Default will auto-fill the **Execution Pipeline** field.
- If you are editing an existing rule, **Execution Pipeline** entries remain intact until edited. Only then are entries are validated against any changes you may have made to the Pipeline Linking table.

**Example:** A pipeline has been assigned a behavior of Allow or Default in the Pipeline Linking table. You remove the pipeline from the **Execution Pipeline** field of the business rule and later decide to add it back to the business rule again. You can easily add it to business rule again because the new selection is validated against the Pipeline Linking table and remains a valid selection. However, if instead you had assigned the pipeline a behavior of Disallow in the Pipeline Linking table, when you open a rule with that pipeline assigned, the Execution Pipeline you disallowed will still be shown and will continue to work until you delete that pipeline from the business rule record (i.e., remove it from

	<ul> <li>the Execution Pipeline field on the business rule record). At this point, you cannot add it to the business rule again as the new selection is validated against the Pipeline Linking table and the former pipeline is no longer a valid selection.</li> <li>Selecting All Pipelines in the Execution Pipeline field on the business rule does not bypass the Pipeline Linking table. The functionality respects the configuration of the Pipeline Linking table. If a pipeline is configured as "Disallow" in the Pipeline Linking table, the business rule will not run. See Configuring Pipeline Linking.</li> </ul>
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	If selected, the system restricts access to only developer users for some of the rule fields.
Tags	This field indicates a tag that associates the rule with a ClientSpace feature (for example, SIDES, Pricing, or Gradient).  Note: Global admin users can not edit the value in the Tags field if the System check box is selected.
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.

**Note:** When setting **TargetField** and **SourceField** parameters, the datatypes must either match exactly (**EX:** Text to Text) or be otherwise compatible (**EX:** Decimal to Currency). Validation occurs at **Save** to check for an exact or compatible datatype match. If a match is not found, a soft error message displays: "The TargetField '<TargetField Value>' on Dataform '<Dataform Name>' may not be compatible with the SourceField '<SourceField Value>'. Do you wish to continue?"

The soft error allows you to continue with the **Save** but if you do not correct the issue, errors may occur when the rule is triggered.

#### 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.

#### **Related Topics:**

- Business Rule Methods
- Configuring Case Discussion business rules for replies
- Configuring rules to auto-complete tasks
- Configuring Create Discussion business rules
- Configuring rules to generate custom messages
- Reactivate Case business rule

## **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 that 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.	<ul> <li>sFieldName (field to be set)</li> <li>sFieldValue (value to be entered in the field)</li> </ul>
_ClearTabFieldValue	Clears a field on the sTabTableName dataform on save.	<ul> <li>sTabTableName         (Dataform Table of Tabbed Dataform)     </li> <li>sFieldName (field to be set</li> </ul>

### Create Field rules

Method	Description	Parameters
_CreateCalendarEvent		<ul><li>FieldName</li><li>Subject</li><li>Invitees</li><li>StartTime</li><li>EndTime</li><li>MeetingType</li></ul>
_CreateExportTransaction		ExportConfigGUID
_CreateExportTransactionAndData		ExportConfigGUID

Method	Description	Parameters
_CreateExportTransactionAndDataByUser		• ExportUser
		<ul> <li>ExportConfigProc</li> </ul>

## Required Field rules

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

Method	Description	Parameters
_RequireFieldOnForm	Allows you to make a core form field required for data entry. Trigger fields are optional. You can simply make the field required by identifying the field name in <b>sFieldName</b> or you can use the trigger fields in conjunction with <b>sFieldName</b> to make the field required when triggered. <b>Note:</b>	sFieldName
	<ul> <li>Since this is a core form and not a dataform, you will need to open the core form to get the field name instead of going to Dataform Admin.</li> </ul>	
	<ul> <li>sFieldName is case-sensitive. Type the field name exactly as shown on the form.</li> </ul>	
	<ul> <li>As there is some setup required to utilize this method, please contact ClientSpace Professional Services for first-time setup assistance.</li> </ul>	

Method	Description	Parameters
_SE_RequireField _HE_RequireField	Displays a hard error (_HE_RequireField) or soft error (_SE_RequireField) on a parent or child/tab dataform when you attempt to save the form without entering a value in the specified required field. If you are configuring a hard error, you are unable to continue the Save process without providing a value. If you are configuring a soft error, you can choose to provide a value or you can continue the Save process without providing a value.  Note:  These methods are only configurable on the primary form of a tab set but you can reference triggering fields from tabbed forms.  These methods replace the _RequireFieldOnThisForm and _RequireTabField business rule methods. Beginning with ClientSpace Release 147, while these methods will no longer be available to configure for new rules, existing rules using these methods will continue to trigger and be available for editing.	<ul> <li>RequiredDataformName:         The Dataform where the required field is located.         #ThisForm or the name of the current dataform can be used to indicate the same form on which this rule is configured. The name of the tabbed dataform must be used for tabbed dataforms.     </li> <li>RequiredFieldName: The required field on dataform or tabbed dataform specified in the RequiredDataformName parameter.</li> </ul>

Method	Description	Parameters
_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	<ul><li>sFieldPath</li><li>sFieldLabel</li></ul>

## 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>	<ul> <li>FieldName (text): The field which the rule will validate for duplicate records.</li> <li>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.</li> <li>IncludeInactiveRecords (checkbox): When selected, the rule validation includes Inactive records, overriding the default active only behavior.</li> </ul>

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>	<ul> <li>FieldName (text): The field which the rule will validate for duplicate records.</li> <li>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.</li> <li>IncludeInactiveRecords (checkbox): When selected, the rule validation includes Inactive records, overriding the default active only behavior.</li> </ul>

## Core rules

In addition to the standard required field rules, CORE rules allow for multiple trigger conditions when requiring fields. Core 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
_AddRowSecurity	Add Row Security	When triggered, adds row level (i.e., record level) security to the affected record for the current user that triggered the rule, any Global Administrator and an optional user, such as the "Assigned To" user, specified in the <b>SecuredUser</b> method parameter.
		<ul> <li>SecuredUser can be blank if no additional user is being specified.</li> <li>If SecuredUser is specified, field validation ensures a correct user field name is entered.</li> <li>Row level security overrides form level security.</li> <li>Row level security respects field level security and tab level security.</li> <li>When row level security is applied, a</li> <li>Remove Row Level Security icon displays in the Action Center of the open record for Global Admins and users with Admin rights to the current Table Name.</li> </ul>
_AddUserToWorkspace	Add User	When triggered, adds a user from a specified form and field to the workspace user list. The source form can be any single dataform in a workspace. The source field can be any user field on the trigger form.  SourceForm: #ThisForm SourceField: FkUserID

Calculate Value and Set Value and Set Value and Set Value difference between two DateTime datatype fields in Seconds (S), Minutes (MM), Hours (H), Days (D), Weeks (W), or Months (M) between and writes the value as a whole number to a specified TargetField. Set the following method parameters as applicable:  • SourceForm1: Specify the form where the first field in the difference equation is found. Only allows #ThisForm or Single dataforms.  • SourceField1: Specify the first field in the difference equation. Only DateTime datatype fields are valid.  • SourceForm2: Specify the form where the second field in the difference equation. Only DateTime datatype fields are valid.  • SourceField2: Specify the second field in the difference equation. Only DateTime datatype fields are valid.  • TargetForm: Specify the form where the results of the equation will be set. Only allows #ThisForm or Single dataforms.  • TargetField: Specify the field where the results of the equation will be set. Only allows #ThisForm or Decimal datatypes.  • TimeUnit: Specify the unit of measurement for the time difference calculation results: S = Seconds, MM = Minutes, H = Hours, D = Days, W = Weeks, and M = Months.  Note: When selecting a time unit, keep	Method	Description	Parameters
Trotal When selecting a time and, keep	_CalculateTimeDifference	Calculate Value	When triggered, calculates the time difference between two <b>DateTime</b> datatype fields in Seconds (S), Minutes (MM), Hours (H), Days (D), Weeks (W), or Months (M) between and writes the value as a whole number to a specified <b>TargetField</b> .  Set the following method parameters as applicable:  • <b>SourceForm1:</b> Specify the form where the first field in the difference equation is found. Only allows #ThisForm or Single dataforms.  • <b>SourceField1:</b> Specify the first field in the difference equation. Only <b>DateTime</b> datatype fields are valid.  • <b>SourceForm2:</b> Specify the form where the second field in the equation is found. Only allows #ThisForm or Single dataforms.  • <b>SourceField2:</b> Specify the second field in the difference equation. Only <b>DateTime</b> datatype fields are valid.  • <b>TargetForm:</b> Specify the form where the results of the equation will be set. Only allows #ThisForm or Single dataforms.  • <b>TargetField:</b> Specify the field where the results of the equation will be set. Only allows <b>Text</b> , <b>Integer</b> , or <b>Decimal</b> datatypes.  • <b>TimeUnit:</b> Specify the unit of measurement for the time difference calculation results: S = Seconds, MM = Minutes, H = Hours, D = Days, W = Weeks, and M = Months.

Method	Description	Parameters
		in mind that ClientSpace writes the calculated time difference as a whole number. For example, if you select a time unit of Months (M) and there is a time difference of two weeks between the two <b>DateTime</b> datatype fields you identified, the <b>TargetField</b> will show 0 as no partial months are being written to the <b>TargetField</b> .
		UseBusinessHours: Select this option to base time difference calculations on business hours and work week settings specified in your ClientSpace install settings. The fields used to determine business hours are Business Open, Business Close, Business Week Begin Day and Business Week End Day. If you require help with these settings, please log a case with your Professional Services representative.  When calculating across holidays, ClientSpace is using the holidays entered in the Company Holiday table
		( (System Admin > Advanced > Company Holiday) to determine the holiday hours that should be excluded from time difference calculations.

Method	Description	Parameters
HE_ExistingWorkspace	Hard Error	When triggered, if there is a workspace associated with the triggering organization, the following hard error displays: "This organization already has a Workspace associated with <workspacename>. Please contact your system admin if you believe this is in error."  Note: Site must be configured to use rules on the organization. Please contact ClientSpace Professional Services if you want to activate this rule.</workspacename>
HE_RequireRateGroup	Hard Error	<ul> <li>When triggered, validates Offered Benefit Plan (OBP) Rate Group(s) as follows on Add and Edit of an OBP:</li> <li>If the plan has no associated Rate Groups and the OBP Rate Group field is blank, the rule does not trigger.</li> <li>If the plan has rate groups but they are all Inactive, the rule does not trigger.</li> <li>If the plan has one or more associated Active Rate Groups and the OBP Rate Group is blank, the rule triggers and the hard error message displays: "This Offered Benefit Plan must have a Rate Group selected."</li> </ul>

Method	Description	Parameters
_SE_RequireFieldOnFormOnTrigger _HE_RequireFieldOnFormOnTrigger	Soft Error Hard Error	<ul> <li>TriggerTable: must be gen_x or #ThisForm.</li> <li>#ThisForm uses live data from the current form PRIOR to the save.</li> <li>gen_x evaluates the TriggerField value in the database to determine if TriggerField: must be a valid field on Trigger Table.</li> <li>TriggerValue: must be a value or #IsEmpty.</li> <li>RequiredTable: must be gen_x or #ThisForm.</li> <li>#ThisForm uses live data from the current form PRIOR to the save.</li> <li>gen_x evaluate the RequiredField value in the database to determine if RequiredField: must be a valid field on RequiredTable.</li> <li>RequiredTable.</li> </ul>

Method	Description	Parameters
_HE_DateBetween	Hard Error	This method calculates the time in days between two dates and determines whether the value is greater than or less than a limit (in days) that you set. This method is typically used to trigger a hard error when a date entered on a SIDES questionnaire does not fit the required SIDES parameters but could be repurposed for other scenarios where this type of comparison is required.
		Method Parameters:
		<ul> <li>SourceField: Specify the first date in the calculation. Only Date datatype fields are valid.</li> </ul>
		<ul> <li>TargetField: Specify the second date in the calculation. Only Date datatype fields are valid.</li> <li>Note: CurrentDate can also be used as the TargetField to calculate the days between the SourceField and the current date.</li> </ul>
		Operator: Type the operator (without spaces) as GreaterThan or LessThan.  No other operators are permitted.
		DaysLimit: The maximum or minimum (depending on the Operator used) of days between the SourceField and TargetField. If the calculated number of days does not fall within the limit, the hard error is triggered.

Method	Description	Parameters	
_HE_DateComparison	Hard Error	Hard Error  This method compares two dates to determine if the first date is greater than or less than the second date. This method is typically used to trigger a hard error when a date entered on a SIDES questionnaire doe not fit the required SIDES parameters but could be repurposed for other scenarios where this type of comparison is required.	
		<ul> <li>SourceField: Specify the first date in the comparison. Only Date datatype fields are valid.</li> <li>TargetField: Specify the second date in the comparison. Only Date Cloning or Clonedatatype fields are valid. Note: CurrentDate can also be used as the TargetField to compare the SourceField to the current date.</li> <li>Operator: Type the operator (without</li> </ul>	
		spaces) as GreaterThan or LessThan. No other operators are permitted.  • IncludeDay: If checked, the Source Field and Target Field date can be the same day and cause the hard error to trigger. If unchecked, the Source Field and Target Field must be greater than or less than the other to trigger the error.	
_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	

Method	Description	Parameters
_HE_LimitFileUploadTypes	Hard Error	Limits the file types that can be saved into a field.
_HE_ValidateMinMax	Hard Error	Validates the minimum and maximum values for specific datatypes that support Integer, Number, Decimal, and Money. If the imported amount exceeds the minimum or maximum values, the import fails and records each failed issue. When all the values in the field meet the acceptable range, the dataform is updated.

Method	Description	Parameters
_HE_ValidateIncidents	Hard Error	This method checks for open tasks associated with a case when a user changes the status of the case to Complete and the user attempts to save the case.
		If the case includes any incomplete tasks that are not marked Private, the system displays the following message:
		The following error(s) were found in your submission:
		There are associated tasks that are not complete. You must complete these tasks before resolving the case.
		If the case includes any incomplete tasks that are marked Private, the system displays the following message:
		The following error(s) were found in your submission:
		<ul> <li>There are associated tasks that are not complete that may be Private. The users assigned to these tasks must complete them before resolving the case.</li> </ul>
		If the case includes any incomplete tasks that are marked Private AND the user is a Global Administrator, the system appends the following additional information to the end of message above:
		If private, please contact the following users
		- ( <firstname> <lastname>)</lastname></firstname>

## 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

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.	<ul> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field accepts datetime shortcuts (t,d,w,m,y, mm, h), such as, t (current time),1w (+1 week), 1h (+ 1 hour), 30mm (+ 30 minutes), -1d (-1 day), etc.</li> </ul>
_SetDateFieldValueFromSourceField	Sets the Date field from a field on another dataform.	<ul> <li>TargetField: Field on form to be set.</li> <li>SourceField: Field on SourceForm to be inserted.</li> <li>SourceForm: Dataform providing inserted value.</li> <li>OffsetInterval</li> </ul>

Method	Description	Parameters
_SetDateTimeFieldValue	Sets a Date Time field on the TableName dataform.	<ul> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field accepts datetime shortcuts (t,d,w,m,y, mm, h), such as, t (current time),1w (+1 week), 1h (+ 1 hour), 30mm (+ 30 minutes), -1d (-1 day), etc. and specified date times, if desired. (Must be in Military or Zulu time.)</li> </ul>
_SetDateTimeFieldValueFromSourceField	Sets the Date Time field from a field on another dataform.	<ul> <li>TargetField: Field on form to be set.</li> <li>SourceField: Field on SourceForm to be retrieved and inserted into the TargetField.</li> <li>SourceForm: Dataform providing inserted value.</li> <li>OffsetInterval: May be used standalone or combined with datetime shortcuts (t,d,w,m,y, mm, h). If no offset is necessary, field can be left blank.</li> </ul>

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.
_SetFieldFromLookupMetadata	Sets a dataform field value on the triggering dataform from a field value on an associated metadata dataform when a lookup is selected that contains metadata. The source and target data types must be the compatible. Metadata field to Target field validation prevents you from specifying mismatched data types.  Note: If there is no metadata available when the rule is triggered, the rule is skipped.	<ul> <li>SourceLookup:         Lookup field on the         source form.</li> <li>MetadataField:         Metadata field         associated with         SourceLookup.</li> <li>TargetField: Lookup         field to be set.</li> </ul>

Method	Description	Parameters
_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.	<ul> <li>TargetField: Field on form to be set.</li> <li>SourceField: Field on SourceForm to be inserted.</li> <li>SourceForm: Dataform providing inserted value.</li> <li>AllowEmptyValue: Clears the target field if SourceField is empty. When unchecked, the target field remains unchanged.</li> </ul>

Method	Description	Parameters
_SetFieldFromRelatedForm	Sets a field on the child dataform from a field on a dataform that is defined as the related parent dataform regardless of workspace.  Sets a field on the current:  • Single dataform from a field on a different single dataform Or  • Single dataform from a field on a different multiform Or  • Multiform from a field on a different multiform  Note:  • Both fields can be in the same workspace OR in different workspaces. If the fields are in different workspaces, a parent form field must connect the two forms.  • Data types must match.  • If the child field referenced by the rule is empty, the system will take no action.	<ul> <li>TargetField: The Field Name of the field (on the 'Dataform Name' dataform) into which the system will insert the SourceField value.</li> <li>SourceField: The field on the SourceForm from which the system will retrieve data and insert it into the TargetField.</li> <li>SourceForm: The Dataform from which the data will be retrieved. Tip: '#ThisForm' can be used to indicate the same form on which this rule is configured</li> <li>AllowEmptyValue: If checked, allows the TargetField to be cleared if the Sourcefield value is empty. If unchecked and the Sourcefield value is empty, the system will not update the value in the TargetField.</li> <li>RelatedParentField:</li> </ul>

Method	Description	Parameters
		The field on the Table Name that is
		the relationship to the SourceForm from
		which data will be retrieved and
		inserted into the TargetField.

Method	Description	Parameters
_SetFieldOnFormFromFormTabs	Takes a value from a field on a dataform or tab dataform and sets it on another dataform or tab dataform. The new method supports the following configurations:  • Singleform to singleform  • Multiform to singleform  • Multiform to multiform if both dataforms are within the same tab set  • Tab field to Tab field if both fields are within the same tab set  Note:  • _SetFieldFromTabOnTab is only configurable on the primary form of a tab set but the triggering fields can come from tabbed forms.  • Target Field and SourceField datatypes must be compatible. See Field Datatype Validation - Compatible Datatypes.	• TargetForm: The dataform containing the TargetField. The dataform to which data will be copied. This can be the Primary form, a singleform or any tab form within the tab set. '#ThisForm' can be used to indicate the same form on which this rule is configured. • TargetField: The field where the data will be inserted. • SourceForm: The dataform containing the SourceField. The dataform from which data will be copied. • SourceForm from which data will be copied. • SourceForm from which the system will retrieve the data being inserted into the TargetField.

Method	Description	Parameters
_SetFieldOnRelatedForm	Sets a field on the parent dataform from a field on a dataform that is defined as the related child dataform.  Sets a field on the current:  • Single dataform from a field on a different single dataform Or  • Single dataform from a field on a multiform Or  • Multiform from a field on a different multiform  Note:  • Both fields must be in the same workspace and the data types must match.  • If the child field referenced by the rule is empty, the system will take no action.	TargetField: The Field Name of the field (on the 'Dataform Name' dataform) into which the system will insert the SourceField value  SourceField: The field on the SourceForm from which the system will retrieve data and insert it into the TargetField.  SourceForm: The Dataform from which the data will be retrieved. Tip: '#ThisForm' can be used to indicate the same form on which this rule is configured  AllowEmptyValue: If checked, allows the TargetField to be cleared if the Sourcefield value is empty. If unchecked and the Sourcefield value is empty, the system will not update the value in the TargetField.  RelatedParentField  RelatedParentField

Method	Description	Parameters
		: The field on the Table Name that is the relationship to the SourceForm from which data will be retrieved and inserted into the
		TargetField

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, even if it is inactive. When a rule uses this method and the system executes that rule, the system can copy up to 500 characters from the source field on the source dataform to the target field on the target dataform.  ***Can only be used on gen_	<ul> <li>TargetField: Field on the form to be set.</li> <li>SourceForm to be inserted.</li> <li>TargetForm: The dataform to which the data will be copied.</li> <li>SourceForm: Dataform providing inserted value.</li> </ul>

Method	Description	Parameters
	dataforms that are not Multiforms.	
_SetFieldValue	Sets a field on the TableName dataform on save.	<ul> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field.</li> </ul>
_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.	<ul> <li>TargetField: Text datatype</li> <li>SourceField: text</li> <li>Pattern</li> </ul>

Method	Description	Parameters
SetImportID	Sets the ImportID on the State Master form equal to the State field on the same form. The ImportID will be refreshed if the State is updated.	<ul> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field.</li> </ul>
_SetTabDateFieldValue	Sets a Date field on the sTabTableName dataform (i.e., Tab dataform associated with the triggering dataform)	<ul> <li>sTabTableName:         Dataform Table of Tabbed Dataform.     </li> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field accepts datetime shortcuts (t,d,w,m,y, mm, h), such as, t (current time),1w (+1 week), 1h (+ 1 hour), 30mm (+ 30 minutes), -1d (-1 day), etc. and specified date times if desired. (Must be in Military or Zulu time.)</li> </ul>

Method	Description	Parameters
_SetTabDateTimeFieldValue	Sets a DateTime field on the TabTableName dataform (i.e., Tab dataform associated with the triggering dataform).	<ul> <li>sTabTableName:         Dataform Table of         Tabbed Dataform.</li> <li>sFieldName: Field to         be set.</li> <li>sFieldValue: Value to         be entered in the         field accepts         datetime shortcuts         (t,d,w,m,y, mm, h),         such as, t (current         time),1w (+1 week),         1h (+ 1 hour), 30mm         (+ 30 minutes), -1d (-         1 day), etc.</li> </ul>
_SetTabFieldValue	Sets a field on the sTabTableName dataform on save.	<ul> <li>sTabTableName:         Dataform Table of Tabbed Dataform.     </li> <li>sFieldName: Field to be set.</li> <li>sFieldValue: Value to be entered in the field.</li> </ul>

Method	Description	Parameters
_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.	<ul> <li>TabTableName:         Dataform Table of         Tabbed Dataform.</li> <li>TargetField: Field to         be set.</li> <li>SourceField         <ul> <li>Use #CurrentUser                 to set the target                 user field to the                 current logged in                 user.</li> <li>Use #LoginID                 (with LoginID                 replaced by a                 specific user                 login ID) to                 automatically set                 the target user                 field to a specific                 user.)</li> </ul> </li> </ul>

Method	Description	Parameters
_SetUserField	Sets a user field on the same dataform.	<ul> <li>TargetField: Type the field for a user to be inserted into.</li> <li>If a non-user field is selected as the TargetField, such as a text field, the UserID will be set in the TargetField.</li> </ul>
		<ul> <li>SourceField: Type the field on the SourceForm from which data will be retrieved and inserted into the TargetField.</li> <li>Does not accept user fields on other forms.</li> <li>Additionally, use #CurrentUser to set the target user field to the current logged in user.</li> <li>Additionally use #LoginID (with LoginID replaced by a specific user login ID) to automatically set</li> </ul>
		the target user field to a specific user. This sets the target field to the

Method	Description	Parameters
		specified user (i.e., #bob_smith.) • Leaving the TriggerField and TriggerValue blank when configuring this rule sets the value on save of trigger dataform.
SetDueDateFromCaseTypeOffset	Sets the Client Service Case <b>Due Date</b> based on the <b>Due Date Offset</b> and <b>Due Date Offset Method</b> configured on the Client Service Case Type record in the Admin Workspace.	No method parameters are required. This method uses the <b>Due Date Offset</b> and <b>Due Date Offset Method</b> settings located on the Client Service Case Type record. See Configuring Case Types.
	The default <b>Due Date Offset Method</b> is Calendar Days. This optionincludes non-business days and company holidays in the <b>Due Date Offset</b> calculation.	
	Select Business Days to calculate the <b>Due Date Offset</b> using business days. This method <u>excludes</u> non-business days and company holidays from the <b>Due Date Offset</b> calculation.	

Method	Description	Parameters
SetFieldFromSalesEntity	Sets a field on a form from a field on a Sales Entity dataform (System Admin > Administrative Data > Sales Entity) when the Client Master dataform is saved.  Example: Update the Contract Effective Date on the Client Master with the Effective Date on the Sales Entity record.  The Sales Entity form used to update the TargetField is identified by matching the assigned user in the Sales Rep field and Contract Type on the Client Master with the sales entity record. If there is more than one Sales Entity form associated with the assigned user and matching Contract Type, the Sales Entity form with the Is Primary flag checked is used.  Note: This business rule method should only be used on a single form in the same workspace.	<ul> <li>Sales Entity Field:         Field name on the         Sales Entity form         used to update the         Target Field on the         Target Form.         Note: The field will         allow non system         fields (i.e., fields         beginning with z_).</li> <li>Target Form:         Data form to which         the data will be         copied. Must be a         single form in the         same workspace.         Note: #This Form         can be used when         Target Form is         Client Master.</li> <li>Target Field: Field         on the         Target Field: Field         on the         Sales Entity Field         field.</li> </ul>

Method	Description	Parameters
SetPayrollFrequency	Sets the Payroll Frequency field on a Pay Group. The SetPayrollFrequency method uses the difference between the <b>Period Start</b> and Period End date fields on the Pay Group to determine the pay frequency. The following list illustrates how the system determines the pay frequency:	
	<ul> <li>If the difference between the start and end dates equals seven, the system sets the pay frequency to Weekly.</li> <li>If the difference between the start and end dates</li> </ul>	
	equals 14, the system sets the pay frequency to <b>Bi-Weekly</b> .  • If the difference between	
	the start and end dates equals 13,15, or 16, the system sets the pay frequency to <b>Semi-Monthly</b> .	
	If the difference between the start and end dates is greater than 27, the system sets the pay	
	<ul> <li>frequency to Monthly.</li> <li>If the difference between the start and end dates is anything else, the system sets the pay frequency to</li> </ul>	

Method	Description	Parameters
	Other.	
SetStaffingEmployeeRelatedFields	Sets the Location, Comp Code, and Jurisdiction State from the selected Staffing Placement when the Staffing Placement field on the Comp Claim Claimant dataform is edited. The field state must be "IsDirty" and "NotEmpty".	

## Stage Field rules

**StageField** rules allow you to prepare a field value to be saved to a target form and apply the change later in the save process based on a set of triggering parameters.

The \_StageField rules provide several non-specific trigger values:

Method	Description	Parameters
_StageChangesOnFormFromForm	Prepares a field value on the source dataform ( gen_DataformName or #ThisForm) to be saved to a specified field of the same datatype on the target dataform (gen_DataFormName). The rule stages the field on a single dataform from a different single dataform in the same workspace. The rule is triggered by a third, completely different single dataform in the same workspace.  Note:  The rule can be used on single dataforms only, not multiforms.  The source and target datatypes must be the same.  The system can copy up to 500 characters from the source field on the source dataform to the target field on the target dataform.  If the rule is triggered and not followed up at any point by a _ SaveStagedChanges rule, the triggered change will not occur on the target form.	<ul> <li>TargetField: The field name of the field on the target dataform into which the system will insert the SourceField value.</li> <li>TargetForm: The dataform to which the data will be copied.</li> <li>SourceField: The name of the field on the source dataform from which the system will retrieve data and insert it into the TargetField.</li> <li>SourceForm: The dataform from which the data will be retrieved. #ThisForm' can be used to indicate the same form on which this rule is configured.</li> <li>AllowBlankValues: When this parameter is set and the rule is triggered, the TargetField on the TargetForm is cleared if the SourceForm has no</li> </ul>

Method	Description	Parameters
		value.
_SaveStagedChanges	Works in conjunction with _ StageChangesOnFormFromForm. Saves any staged changes from a source form to an associated target form while following the specified pipelines that have been triggered prior to the triggering of this method.  Note:  • The rule will validate the existence of the TargetForm and that it is not a multiform.  • Hard and soft errors will be ignored when saving the target form.  • The rule can trigger business logic, email templates and workflow channels.	TargetForm: The dataform to which the data will be copied.  Pipeline: The pipeline the rule should follow once triggered.  (Validates against the Pipeline Code from the Pipeline Linking table.)

### Generating Merge File Rule

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.

Method	Description	Parameters
_GenerateMergeFile	When you create the rule, use the method _ GenerateMergeFile.	<ul> <li>MergeGUID: The 8 or 36 character Merge GUID (from the Merge form).</li> <li>TargetForm: Enter the table name for a single form dataform in the current workspace on which the system will store the merge output. Tip: You can enter "#ThisForm" to indicate the same form on which this rule is configured (this can be a multi-form).</li> <li>TargetField: Enter a field name for a field on the TargetForm to indicate the field to which the system will store the merge output. Tip: You can enter "#Attachment", to attach the merge output to the TargetForm (this will not version the attachment).</li> <li>FilePrefix: Enter a value to add as a prefix to the merge output (for example, the system uses the format 'FilePrefix-YYYYMMDDHHMMSS.ext').</li> <li>Note: Enter only valid file name characters or an error may occur</li> <li>SaveRecord: If the checkbox is checked then the triggering dataform record will be saved before generating the merge.</li> </ul>

## Change Workspace Template Rule

You can create a rule that will allow you to change the workspace template. When triggered, the current workspace will be set to the template specified on the rule.

Method	Description	Parameters
SetWorkspaceTemplate	When you create the rule, use the method <b>SetWorkspaceTemplate</b> . Changing the workspace template will rebuild the workspace, inheriting the user and dataform values configured on the new template.	TemplateCode: The workspace template code of the template workspace that the rule will use for the current workspace.

## Complete All Non-Archived Tasks Rule

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 <b>_TaskAutoCompleteAll</b> . This method completes all non-archived tasks that are associated with a dataform except for tasks that define a recurring rule.

#### **Create Incident Rule**

You can create a rule that will import historical incident/task data from another application into a ClientSpace task within the correct Workspace.

Method	Description
CreateIncident	When you create the rule, use the method <b>CreateIncident</b> . The <b>CreateIncident</b> method uses the Import_Incidents dataform to temporarily store incident information until the task information is extracted from it.  Once a rule is triggered using the <b>CreateIncident</b> method, an Import_Incident file is uploaded through Import Management. The file is processed, and each row is read and stored in the Import_ Incident dataform until the task is generated. Then, the dataform is deleted. Any errors encountered during file processing are stored in the Log File (without any disruption to Import_Incident file processing). Finally, the imported task information is imported into new ClientSpace task records within the correct Workspaces.
	Configure the rule using the following settings:
	<b>Note:</b> Not all General settings are listed. These are the settings necessary for the rule to work.
	<ul> <li>Table Name: Import_Incident</li> <li>Rule Title: Create Incident/Task</li> <li>Description: Used to create and update tasks (also known as incidents) imported from another application.</li> <li>Method: CreateIncident</li> <li>Primary Source: Import_incident</li> <li>Primary Trigger Field: HdrAction</li> <li>Primary Trigger Operator: Equals</li> <li>Primary Trigger Value: Convert</li> <li>Execution Pipeline: Default</li> <li>Execution Order: 10 is the default setting. Controls the order in which rules execute. Hard errors, soft errors and business logic execute first. Other rules execute from lowest to highest Execution Order. It may be necessary to review other rules configured on the dataform specified in the Table Name to determine the proper execution order.</li> <li>Save Action: Both</li> <li>Workspace Templates: All Templates</li> <li>Save Action: Both</li> </ul>

Method	Description
	Method Parameters Field Definitions:
	No Method Parameters are required.

### Add Subscribers by Role Rule

You can create a rule that will add subscribers based on their role on the client team instead of adding subscribers as specific users to each client service case.

Method	Description	Parameters
_AddSubscriber	When you create the rule, use the method _AddSubscriber. This method adds a subscriber to a case by using a user field from an active, single dataform (for example, the client master).	<ul> <li>SourceForm: The         Dataform from which the         data will be retrieved.         '#ThisForm' can be used         to indicate the same form         on which this rule is         configured.</li> <li>SourceField: The user         field on the SourceForm         that will be used to add a         subscriber.</li> </ul>

#### Mark Rehire Rule

You can create a rule that sets the **Rehire** checkbox on the Employment dataform to checked when the employee's **Employment Status** is updated from Terminated to Active so that you do not have to remember to click the **Rehire** checkbox manually.

Method	Description
MarkRehire	When a rule is triggered using the <b>MarkRehire</b> method, it sets the <b>Rehire</b> checkbox on the Employment dataform to checked when <b>Employment Status</b> is updated from Terminated to Active and the <b>Last Hire Date</b> is different from the <b>Original Hire Date</b> .

### Inactivate Deleted Employee Rule

You can create a rule that sets the **Employment Status** field in the ClientSpace Employment record to "Deleted" and then deactivates the Employment record. The rule is triggered when a deleted employee record is imported by the PrismHR User Import API.

Method	Description
Inactivate Deleted Employee	The rule is triggered when a deleted employee is imported by the initial or ongoing PrismHR User Import API. The rule sets the <b>Employment Status</b> field on the Employment record to "Deleted", then deactivates the Employment record and related employee record by removing the check marks from the <b>Active</b> checkboxes or those forms. When you create the rule, use the following settings:
	Table Name: Employment
	Rule Title: Inactivate Deleted Employee
	<ul> <li>Description: Rule triggers when an employee is deleted in the connected PrismHR install. When the import queue record is processed, the Employment Status will be set to "Deleted" and the Employment and related Employee record will be deactivated.</li> </ul>
	<ul> <li>Method: InactivateDeletedEmployee</li> </ul>
	Primary Trigger Field: Employment Status
	• Primary Trigger Operator: Is Dirty
	Secondary Trigger Field: Employment Status
	Secondary Trigger Operator: Equals
	Secondary Trigger Value: D
	Execution Pipeline: Imports, Initial Import
	Save Action: Both
	System: Checked

### Inactivate Child Forms Rule

When an imported PrismHR batch is in "Deleted" status, the Inactivate Child Forms rule deactivates the Payroll Batch as well as the associated Pay Groups and Billing Vouchers. The rule is triggered when a deleted Payroll Batch is imported by the PrismHR Payroll Batch Import API.

Method	Description
InactivateChildForms	The rule is triggered when a deleted Payroll Batch is imported by the PrismHR Payroll Batch Import API. The rule sets the <b>Batch Status</b> field on the Payroll Batch form to "Deleted", deactivates the Payroll Batch and deactivates associated Pay Groups and Billing Vouchers by removing the check marks from the <b>Active</b> checkboxes on these forms. <b>Note:</b> The rule needs to be configured on the same pipeline as the HRPAPI_payroll_batch*.csv import configuration so that it triggers
	when Payroll batches are imported.

## Field Calculation Rule

Method	Description
_FieldCalculation	The _FieldCalculation method allows you to calculate a field value using numeric field values on a dataform and then set the resulting calculation in a numeric field on the same dataform. The rule triggers when the dataform is saved. Configure the rule using the following settings:  • Table Name: The dataform containing the numeric fields you want to use in a mathematical expression.
	Method: Select _FieldCalculation.
	• <b>Expression:</b> The expression is the mathematical equation. It can consist of:
	<ul> <li>The numeric field names from the identified dataform (from which ClientSpace will retrieve the values used in the calculation.)</li> </ul>
	<ul> <li>Manually typed numeric values.</li> </ul>
	<ul> <li>Permitted mathematical symbols listed in the <b>Note</b> section below.</li> </ul>
	TargetField: Field on the same dataform identified in Table     Name that will hold the resulting calculation.
	Note:
	The <b>Expression</b> field has a 500 character limit.
	<ul> <li>Only the following symbols may be used to build an expression: +, -, *, /, or ( ).</li> </ul>
	<ul> <li>The field calculation rules follow the appropriate order of operations when performing calculations. For example, in the following expression, the field values in parentheses are divided before the multiplication step occurs: (Field1/Field2) * (Field3/Field4) + 100</li> </ul>
	<ul> <li>An expression can be entered with or without spaces around the symbols. For instance, both expressions below are valid: (Field1/Field2) * (Field3/Field4) (Field1 / Field2)*(Field3 / Field4)</li> </ul>
	Field validation is used to ensure that the fields used in the

Method	Description
	expression and target field are numeric. The field names cannot be misspelled and the fields must be an Integer, Decimal, Money or Percent element type. Field validation errors are presented on the page in an error message.
	<ul> <li>The identified target field should match the desired format of the resulting calculation. For instance, if an expression is configured which could result in a decimal value or percentage being returned but the target field is an Integer element type instead of a Decimal, Money or Percentage element type, the decimal places will be truncated in the target field as only whole numbers display in Integer fields.</li> </ul>
	Using a field in the expression with a blank or null field value results in that field value being treated as a zero.
	<ul> <li>Divide by zero errors will cause a calculation to be ignored and skipped. Divide by zero errors are presented on the page in an error message and logged in the Exception Log.</li> </ul>

## Benefits Batch and OBP Renew Rule

Method	Description
Renew	The <b>Renew</b> business rule method clones the Benefits Batch, the Offered Benefits Plans associated with the original batch in "Selected" Status and any new Offered Benefit Plans associated with the original batch. This method also clones all of the enrollment count values (including any null or blank values) from the original batch and updates all of the cloned Offered Benefit Plans with the same <b>Effective Date</b> as the newly renewed Benefits Batch.
	Configure the following settings.
	General Settings Field Definitions:
	<b>Note:</b> Not all General settings are listed. These are the settings necessary for the rule to work.
	<ul> <li>Table Name: Select Benefits Batch. This is the dataform where the rule will be executed.</li> <li>Method: Select Renew.</li> </ul>
	<ul> <li>Rule Title: Enter a brief description of what the rule does. Renew is the default description entered for this pre- configured rule.</li> </ul>
	<ul> <li>Description: A default description detailing what the rule does is provided.</li> </ul>
	<ul> <li>Primary Source: Select Benefits Batch. This the dataform where the Primary Trigger Field is located.</li> </ul>
	<ul> <li>Primary Trigger Field: Select HdrAction.</li> </ul>
	<ul> <li>Primary Trigger Operator: Select Equals.</li> </ul>
	<ul> <li>Primary Trigger Value: Enter Renew. This is the value to be met for the Primary Trigger comparison.</li> </ul>
	Execution Pipeline: Default
	Execution Order: Controls the order in which rules execute. Hard errors, soft errors and business logic execute first. Other rules execute from lowest to highest Execution Order. It may be necessary to review other rules configured on the dataform specified in the Table Name to determine the proper execution order.
	Save Action: Both

Method	Description
	Method Parameters Field Definitions:
	No Method Parameters are required.

# Benefits Batch OBP Sync Rule

Method	Description
BBIsActiveOBPSync	The <b>BBIsActiveOBPSync</b> business rule method inactivates or activates the associated Offered Benefit Plan (OBP) records, setting them to match the state (checked or unchecked) of the <b>Active</b> checkbox on the parent Benefits Batch.
	Table Name: Benefits Batch
	<ul> <li>Method: Select BBIsActiveOBPSync.</li> </ul>
	Execution Pipeline: Default, Imports
	Save Action: Both
	No additional General Settings or Method Parameters are required.
	Note:
	<ul> <li>The <b>Status</b> field value on the OBPs is not affected when the business rule is triggered.</li> </ul>
	<ul> <li>Using the Mass Update OBPs process to set OBPs to Cancel status still works to inactivate OBPs. The business rule offers an alternative way of activating/inactivating OBPs without affecting the Status.</li> </ul>

# Increment Integer Rule

Method	Description
_IncrementIntegerFieldOnForm	The _IncrementIntegerFieldOnForm business rule method allows you to increment an integer field value on the same form (#ThisForm ), the gen_tablename of the triggering form, or a different form when a specified trigger action occurs.
	<b>Example:</b> Add a field to the Client Master named <b>Indemnity WC Claims</b> to track the number of indemnity worker's comp claims for a workspace. Set up the _ <b>IncrementIntegerFieldOnForm</b> business rule to increase the the <b>Indemnity WC Claims</b> field by 1 when a WC Claim is saved with a <b>Claim Type</b> of Indemnity.
	For the above scenario, set up a business rule using the _ IncrementIntegerFieldOnForm business rule method as follows: Primary Source = Comp Claim, Primary Trigger Field = Claim Type, Primary Trigger Operator = Equals, Primary Trigger Value = Indemnity, TargetField = IndemnityWCClaims, TargetForm = gen_ClientMaster and IncrementAmount = 1.
	<b>Note:</b> This rule can be configured on multiple forms to update the same form and field.
	General Settings Field Definitions:
	<b>Note:</b> Not all General settings are listed. These are the settings necessary for the rule to work.
	Table Name: Select the dataform where the rule will be executed.
	<ul> <li>Method: Select _IncrementIntegerFieldOnFomr.</li> </ul>
	Rule Title: Enter a brief description of what the rule does.
	<ul> <li>Description: Enter a more detailed description of what the rule does.</li> </ul>
	<ul> <li>Primary Source: Select the dataform where the Primary Trigger Field is located.</li> </ul>
	<ul> <li>Primary Trigger Field: Select the field or HdrAction to evaluate for the triggering condition.</li> </ul>
	Primary Trigger Operator: Select the operator to use for the

Method	Description
	<ul> <li>Primary Trigger comparison. Example: Equals.</li> <li>Primary Trigger Value: If applicable, type the value to be met for the Primary Trigger comparison.</li> <li>Execution Pipeline: Default, PowerAutomate, ScheduledWFC</li> </ul>
	<ul> <li>Execution Order: Controls the order in which rules execute.         Hard errors, soft errors and business logic execute first. Other rules execute from lowest to highest Execution Order. It may be necessary to review other rules configured on the dataform specified in the Table Name to determine the proper execution order.     </li> <li>Save Action: Both</li> </ul>
	Method Parameters Field Definitions:
	TargetField: Enter the field name integer field being incremented.
	• <b>TargetForm:</b> Enter the form name of the dataform where the TargetField is located or use the #ThisForm code value to use the form listed in <b>Table Name</b> .
	• IncrementAmount: Enter the amount by which you want the TargetField to increase when this rule is triggered. For example, if you want the field to increase by 1, enter 1.

# Modify Field Value Rule

Method	Description
_ModifyFieldValue	The _ModifyFieldValue business rule method allows you to append, prepend or overwrite an existing text field value on single forms and related multi-forms.
	<b>Note:</b> This rule method can only be configured by Developer users only. If you are interested in configuring a rule using this method, please contact Professional Services or log an Extranet ticket.
	Configure the following settings.
	General Settings Field Definitions:
	<b>Note:</b> Not all General settings are listed. These are the settings necessary for the rule to work.
	Table Name: Select the dataform where the rule will be executed.
	Method: Select _ModifyFieldValue.
	Rule Title: Enter a brief description of what the rule does.
	<ul> <li>Description: Enter a more detailed description of what the rule does.</li> </ul>
	<ul> <li>Primary Source: Select the dataform where the Primary Trigger Field is located.</li> </ul>
	<ul> <li>Primary Trigger Field: Select the field or HdrAction to evaluate for the triggering condition.</li> </ul>
	<ul> <li>Primary Trigger Operator: Select the operator to use for the Primary Trigger comparison. Example: Equals.</li> </ul>
	<ul> <li>Primary Trigger Value: Type the value to be met for the Primary Trigger comparison.</li> </ul>
	Execution Pipeline: Default, ScheduledWFC
	<ul> <li>Execution Order: Controls the order in which rules execute. If you are using the StageChanges option, you set an execution order which ensures that the _ModifyFieldValue rule runs before the corresponding _SaveStagedChanges rule so that your changes are available to be applied.</li> <li>Save Action: Both</li> </ul>

Method	Description
	Method Parameters Field Definitions:
	Modification: Enter Append, Prepend or Overwrite.
	• Prepend: Add text in front a standard text input field value (i.e., short text field datatype of 500 characters or less) or above a long text field value (such as Editor, Log or Text Area field datatypes). Example 1: Add the current date and time above the body text of an Editor field used to hold comments. Example 2: Add text (such as A:, B:, or C:) to the beginning of a short text field value to ensure control of the sorting of the value on reports.
	<ul> <li>Append: Add text behind standard text input field value or after a long text field value. Example: Add text such as ( - SF) to the end of a prospect name to denote that the prospect came from Salesforce.</li> </ul>
	Note: The exception to this is inserts to log fields, where the text is always prepended as appending to the end of a log field would interfere with the date/time stamp functionality of the log. If you set an Append Modification value when configuring the business rule method on a log field, the following error message displays upon clicking Save or Apply on the business rule record: "The Modification value for log fields may only be Prepend and cannot be Overwrite or Append."
	You must correct the <b>Modification</b> value to proceed with saving the rule.
	<ul> <li>Overwrite: Replace an existing text field value.</li> <li>Example 1: Replace an incorrect value with a correct value.</li> <li>Example 2: Clear a field and remove a value entirely. This replaces the field with a blank or null value.</li> </ul>
	Note: The exception to this is overwriting log fields, which is a data integrity issue. If you set an Overwrite Modification value when configuring the business rule method on a log field, the following error message

Method	Description
	displays upon clicking <b>Save</b> or <b>Apply</b> on the business rule record: "The Modification value for log fields may only be Prepend and cannot be Overwrite or Append."
	You must correct the <b>Modification</b> value to proceed with saving the rule.
	TargetField: Enter the field name of the field receiving the changes.
	• <b>TargetForm:</b> Enter the form name of the form receiving the changes or use the #ThisForm code value to use the form listed in <b>Table Name</b> .
	<ul> <li>Value: Specify the text you are appending, prepending or using to overwrite. You can leave it blank if you are using an Overwrite modification to set the field to a blank or null value. You can enter text, Replace fields from Email Templates for Organization records, a Related Parent Field (see additional step below), Server Data Proc (SDP) fields, and code logic fields such as:</li> </ul>
	<ul> <li>#CurrentDateTime</li> </ul>
	<ul><li>#CurrentUser</li></ul>
	<ul> <li>{ExistingFieldValue} - Inserts the current field value of the Target field.</li> </ul>
	<ul><li>{ThisForm.FieldName}</li></ul>
	<ul> <li>{ThisForm.fkFieldID} - Decodes the parent form field referenced on the triggering form.</li> </ul>
	<ul> <li>{ThisForm.fkFieldID.Code} - Returns the ID stored in the parent form field on the triggering form</li> </ul>
	<ul><li>{ThisForm.TabForm.TabFieldName}</li></ul>
	Keep in mind that Replace fields are case-sensitive.
	<ul> <li>RelatedParentField: If you want to use Replace fields from a Related Parent Field, specify the field name of the Related Parent Field here. We use this to identify the correct form containing the Replace fields.</li> </ul>
	<ul> <li>Separator: Specify a Separator when making an Append or Prepend modification to a long text field (such as Editor, Log or Text Area field datatypes) where you want the addition to</li> </ul>

Method	Description
	appear on a separate line. Use the non-printing control characters {CRLF} or {NewLine} as separators to indicate the end of a line or a line break.
	Note:
	<ul> <li>When adding values to a Multi-Lookup field, enter '!.!' in the Separator field and at the end of the value.</li> </ul>
	<ul> <li>The following soft error warning displays when you are appending or prepending a long text field without adding a separator upon clicking Save or Apply on the business rule record: "The Separator is not filled out." However, you can click Save Anyway to continue without adding the separator.</li> </ul>
	<ul> <li>StageChanges: Stage the changes for single forms only by clicking the StageChanges checkbox. This interacts with the _ SaveStagedChanges business rule method. Set the _ SaveStagedChanges business rule with an Execution Order that occurs after your _ModifyFieldValue rule triggers so that your changes are ready to be applied when the _ SaveStagedChanges business rule runs.</li> </ul>
	Note:
	<ul> <li>On a multi-tabbed form, when the rule is triggered from a main form field, you can set a value using a Child tab Replace field. For instance, the rule can be set to use the main form as the TargetForm with a Child tab TargetField if using the {ThisForm.TabForm.TabFieldName} code logic in the Value field of the Method Parameters.</li> </ul>
	<ul> <li>There is built in error handling for incorrect applications of the rule, such as trying to update an integer field with text. The error details are logged in the Exception Log and an error message such as this example also displays on the target form: "An unhandled exception occurred {_ModifyFieldvalue Rule Execution}. Please contact your system administrator."</li> </ul>

## 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

#### **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 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 dataform field must have changed

- If #IsDirty 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.

The following list comprises the required field rules.

Rule	Description
_HE_RequireField _SE_RequireField	Displays a hard error (_HE_RequireField) or soft error (_SE_ RequireField) on a parent or child/tab dataform when you attempt to save the form without entering a value in the specified required field. If you are configuring a hard error, you are unable to continue the Save process without providing a value. If you are configuring a soft error, you can choose to provide a value or you can continue the Save process without providing a value.
	Note:
	<ul> <li>These methods are only configurable on the primary form of a tab set but you can reference triggering fields from tabbed forms.</li> </ul>
	<ul> <li>These methods support the following configurations:</li> <li>Singleform to singleform</li> </ul>
	<ul> <li>Multiform to singleform</li> </ul>
	<ul> <li>Multiform to multiform if both dataforms are within the same tab set</li> </ul>
	<ul> <li>Tab field to Tab field if both fields are within the same tab set</li> </ul>
	<ul> <li>These methods replace the _RequireFieldOnThisForm and _ RequireTabField business rule methods.</li> </ul>
	Parameters: RequiredDataformName and RequiredFieldName.

Rule	Description
_RequireAdHocField	Checks for a field value that resides in a node embedded in the dataform XML packet. Parameters: <b>sFieldPath</b> and <b>sFieldLabel</b>

## **Related Topics:**

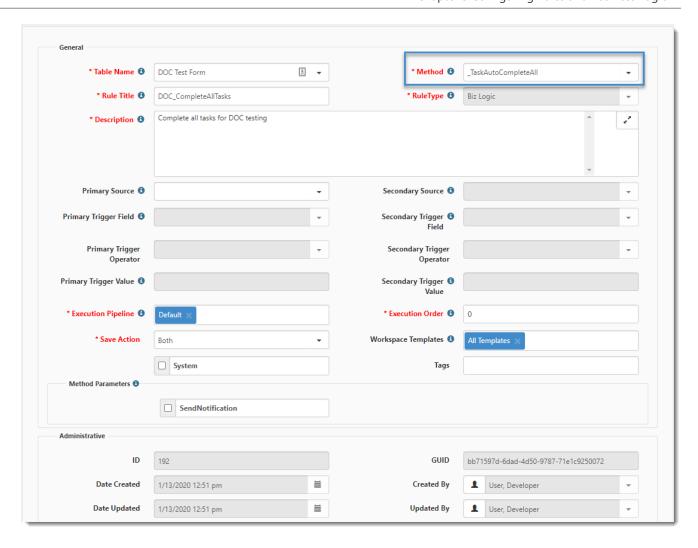
• Business Rule Methods

# 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:

- Go to System Admin → > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- 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 <b>_TaskAutoCompleteAll</b> , the Rule Type is set to Biz Logic.
Description	Provide a more thorough explanation of what this rule is to accomplish.

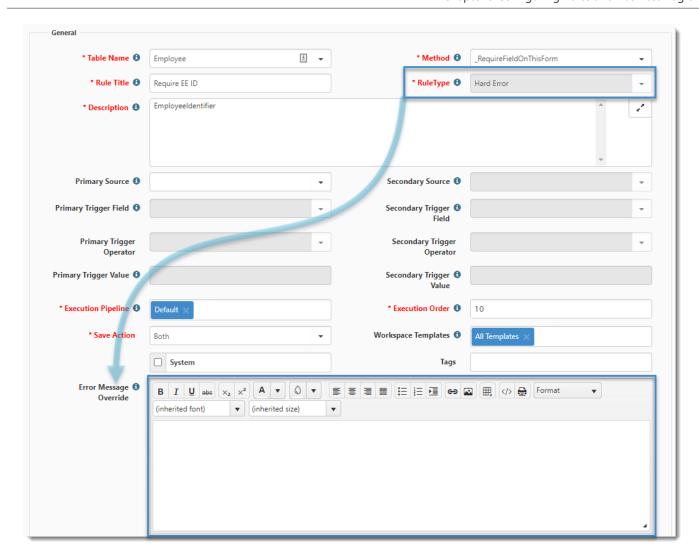
Primary Source	Select the dataform or tabbed child form to use as the source for the primary trigger evaluation.  Note: To save a Primary Source field value, you must select a corresponding trigger field, operator, and value. If you do not, the source value clears upon saving.
Secondary Source	Select the dataform, tabbed child form, Server Data Proc 1 (SDP1) or Server Data Proc 2 (SDP2) to use as the source for the secondary trigger evaluation, if applicable.  Note: To save a Secondary Source field value, you must select a corresponding trigger field, operator, and value. If you do not, the source value clears upon saving.
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 <b>Default</b> .
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 _ <b>TaskAutoCompleteAll</b> 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:

- 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 Source	Select the dataform or tabbed child form to use as the source for the primary trigger evaluation.  Note: To save a Primary Source field value, you must select a corresponding trigger field, operator, and value. If you do not, the source value clears upon saving.
Secondary Source	Select the dataform, tabbed child form, Server Data Proc 1 (SDP1) or Server Data Proc 2 (SDP2) to use as the source for the secondary trigger evaluation, if applicable.  Note: To save a Secondary Source field value, you must select a corresponding trigger field, operator, and value. If you do not, the source value clears upon saving.
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 <b>Default</b> .
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

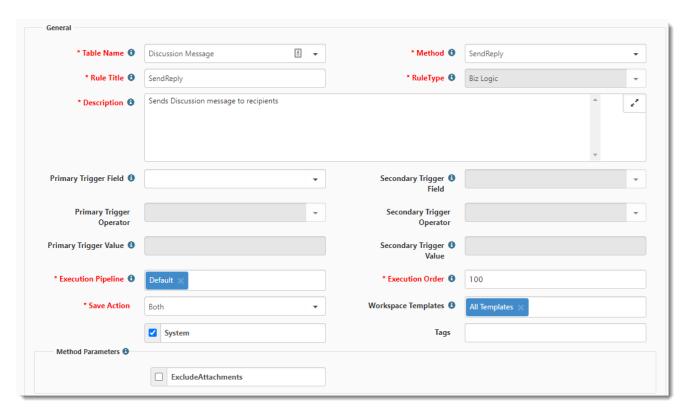
	the BizLogic fills the field. This order of precedence happens irrespective of the execution order placed on the configured rule:  1. Hard Errors fire in execution order least to greatest.  2. Soft Errors fire in their order of execution.  3. Biz Logic fires in the order of execution set on each rule.
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.

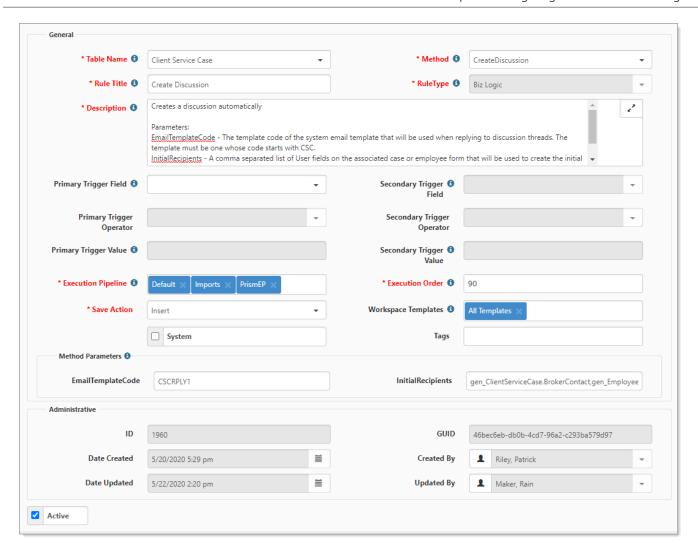
#### SendReply (original)



- 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:

Go to System Admin > Advanced > Manage Rules.
 The Custom Logic Rules dashboard opens.

- Open the rule Create Discussion (click ☑ Jump).
   The Rule Details form opens.
- 3. Complete the form.

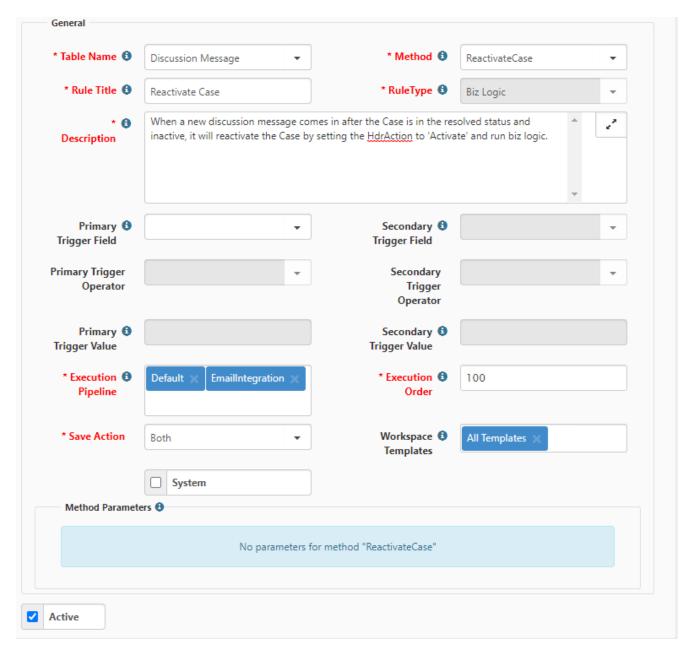
Primary Trigger Field	(Optional) Select a field from the Table Name, which is the Client Service Case.
Primary Trigger Operator	Select one of the following operators if you select a value for the Primary Trigger Field:  • Does Not Equal  • Equal  • Is Dirty
Primary Trigger Value	When you specify a Primary Trigger Field and you select Does Not Equal or Equal in the Primary Trigger Operator field, you can then select a value in the Primary Trigger Value field. For example, for Primary Trigger Field = Communication Method, you can specify a value, such as Employee Portal.
Secondary Trigger Field	(Optional) Select a field from the Table Name, which is the Client Service Case.
Secondary Trigger Operator	Select one of the following operators if you select a value for the Secondary Trigger Field:  • Does Not Equal  • Equal  • Is Dirty
Secondary Trigger Value	When you specify a Secondary Trigger Field and you select Does Not Equal or Equal in the Secondary Trigger Operator field, you can then select a value in the Secondary Trigger Value field.
EmailTemplateCode	Enter the template code of the system email template that is used when replying to discussion threads. The template code must begin with <b>CSC</b> . See Configuring Case Discussion Email Templates.
InitialRecipients	This is a comma-delimited list of User, Contact and Email type fields on the associated case or employee form that will be 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 <b>Active</b> to enable the rule.

#### 4. Click Save.

## Reactivate Case business rule

The Reactivate Case business rule runs on the Discussion Message dataform on the Default Pipeline. This rule triggers when the system receives a reply to a case discussion message after the case is in a resolved status and inactive. When triggered, the system reactivates the case by calling business logic and passing an HdrAction of Activate.

#### **Reactivate Case**



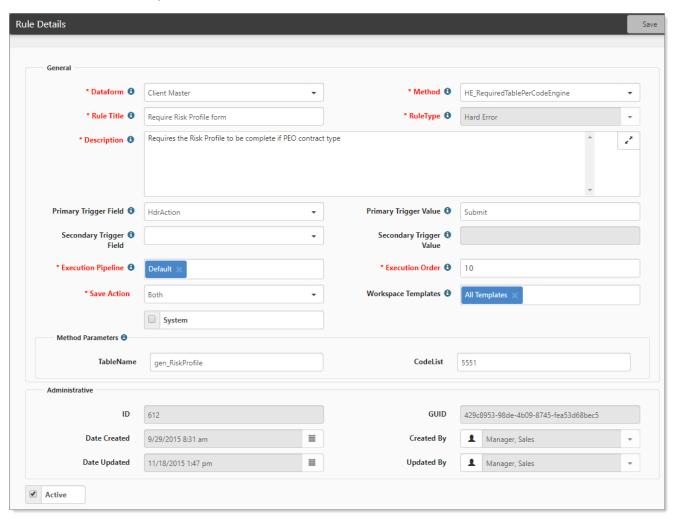
Set on **Default Pipeline**

# 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:

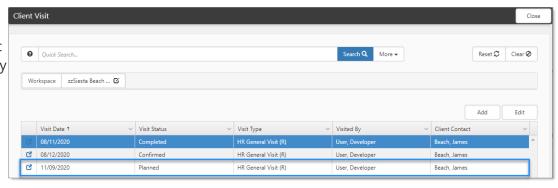
- Go to System Admin → > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- 2. Locate and open the entry with Method Name **HE\_RequiredTablePerCodeEngine**. The Rule Details form opens.



- 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.

# Configuring Recurring Visits

One of the best features of client visits is the ability to set automatically recurring visits. For a recurring visit, when you mark the visit as Completed, the



visit is saved and you are returned to the Client Visit dashboard. When you refresh the list, you see that another Planned visit has been set up.

The recurring planned visit can be established from the Client Master **Company Other Info** tab of the Client Master, when you select a Visit Type of R but other forms can be used.

For recurrence to work, your system administrator must configure Lookup metadata for Type of Visit and Visit Schedule. The following procedures guide you through the configuration.

**Note:** If you need additional fields on the Client Visit Add form than the default fields, advanced administrative access or billable assistance (without a Gold service plan) is required. See ClientSpace Service Plans to learn more about available service plans.

## Step 1: Activate the Rule

First, you must activate the rule, CreateNextVisit.

#### To activate the rule:

- Go to System Admin > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- 2. Locate the Dataform Client Site Visit with the Method Name **CreateNextVisit** and click **(Open)**. The Rule Details form opens.

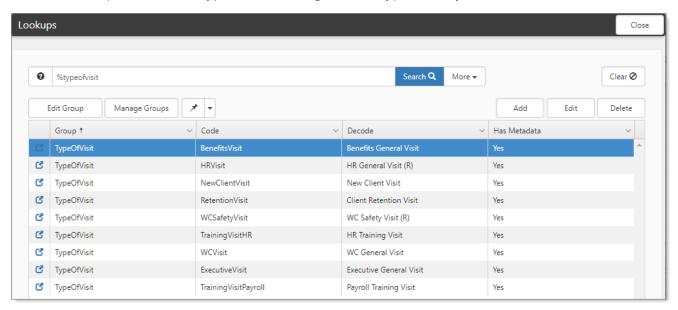
- Select the **Active** option.
   Typically this rule is set to Active.
- 4. Click Save.

## Step 2: Configure the Lookups

The next step is to configure the Lookup metadata for the Type of Visit and Visit Schedule. Different visit types can have different recurrence frequencies. Additionally, there are multiple entries for each of the Lookups. For recurrence to work, you must configure each one.

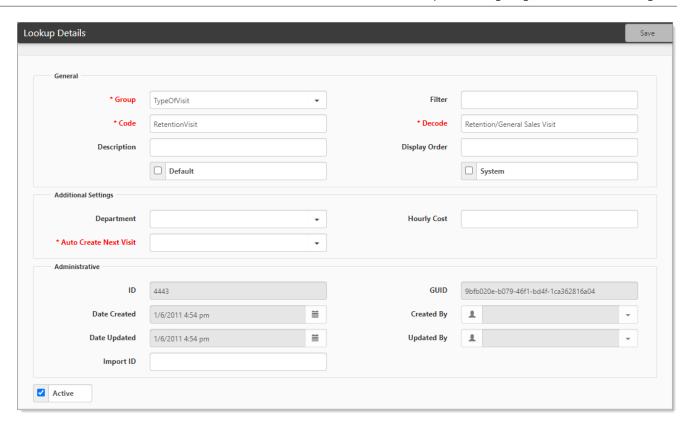
#### To configure the Type of Visit:

- Go to System Admin > Lookups.
   The Lookups dashboard opens.
- Filter on **TypeOfVisit**.
   There are multiple entries for TypeOfVisit. Configure each type where you want recurrence.



3. Select an entry and click (Open).

The Lookup Details form opens. Our example uses RetentionVisit.



4. In Auto Create Next Visit, select Yes.

The **Next Visit Setting** fieldset becomes available, with the required fields **Dataform for Frequency** and **Field for Frequency**.



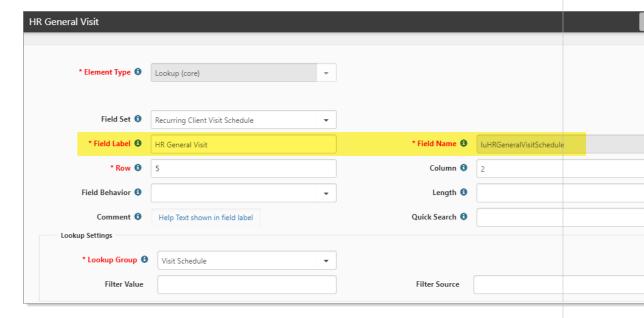
Datafor m for Frequen cy	Select a dataform containing the field that you will use to determine how often a recurrence will occur. The <b>Company Other Info</b> dataform is often used. However, this can be any dataform.
Field for Frequen	Enter the <b>Field Name</b> (not <b>Field Label</b> ) in this field. This must be a field located on the selected <b>Dataform for Frequency</b> . Additionally, the designated <b>Field for Frequency</b>

cy must have an **Element Type** of Lookup (core) in the Lookup Group **Visit Schedule** and **Visit Schedule** metadata must be configured.

#### Note:

If you have advanced administrative access, you can locate the Field Name by opening the dataform properties and displaying the fields of the dataform you specified in Dataform for Frequency. To do this, on the Dataform Admin dashboard (System Admin > Advanced > Dataform Admin), click (Jump) next to the dataform name. To view the fields, in the Action Center, click Fields. Double-click the desired field to display the field properties. This is where the Field Name is found.

In the example below, we are displaying the field properties for the **HR General Visit** field. You can see that it has a **Field Name** of luHRGeneralVisitSchedule. If you wanted to use this field as the **Field for Frequency**, you would enter luHRGeneralVisitSchedule.



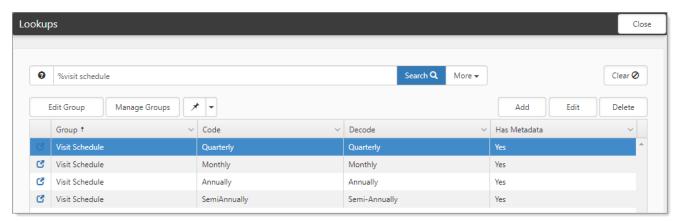
• If you do not have advanced administrative access, alternative ways of getting the **Field Name** are to ask a Global Admin for assistance, create a BI report so that you can see field names, or log an Extranet case for assistance.

#### 5. Click Save.

#### To configure a new frequency:

Lookups for Visit Schedule are already configured with frequency.

To view frequency, in Lookups, filter for **Visit Schedule**.
 The entries are already configured. However, you may want to review or add a new frequency.



- 2. To add a new frequency, click **Add**. The Lookup Details form opens.
- 3. Complete the fields:

Group	Select Visit Schedule.
Code	Enter a name, such as Weekly.
Decode	Enter the name again, such as Weekly.

4. Click Apply.

The Additional Settings fieldset becomes available.

- 5. In **Days per Frequency**, enter a number. For example, for Weekly, type 7.
- 6. Click Save.

## **Related Topics:**

- Adding Client Visits
- Updating visit status using Mass Update

# Chapter 6

# Configuring lookups

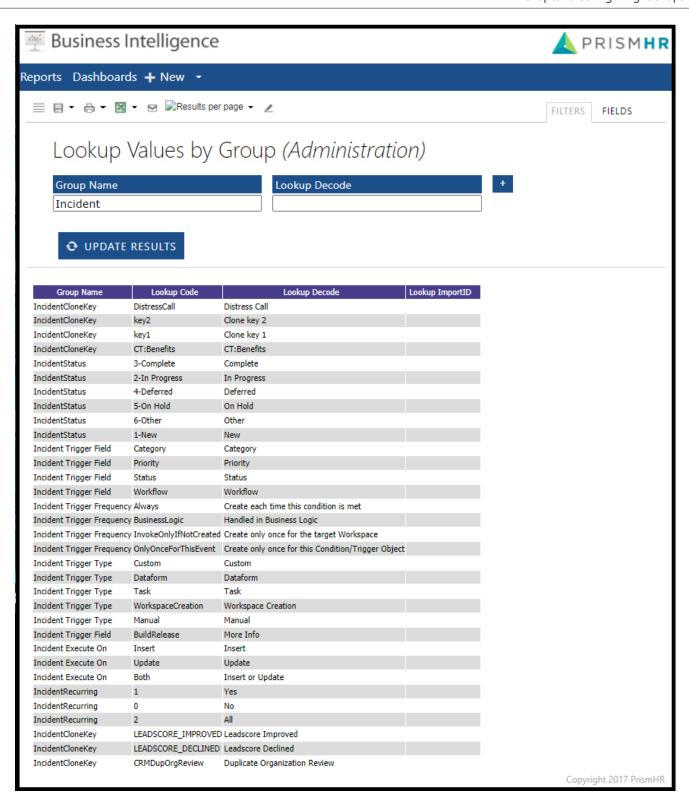
Lookups are one of the most flexible datatypes in ClientSpace and are easily configurable when you understand how they work. Lookups are predetermined, selectable lists of information to ensure data are recorded consistently, instead of a straight text field, which leaves room for errors in spelling 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.

## Before you Begin: Review Existing Lookup Groups

Before you begin adding lookup groups, run the Lookup Value by Group Business Intelligence report and review the existing lookups. Use the Lookup Values by Group to export a list of lookup field values.

The following graphic illustrates the Lookup Value By Group report.



#### Run the Lookup Value by Group Business Intelligence report

- 1. From the modules bar, select **Business Intelligence**. The list of Business Intelligence reports displays.
- Select Administration > Lookup Values by Group.
   The report displays.
- 3. (Optional) Enter a value in the **Group Name** field to filter the results.
- 4. (Optional) Enter a value in the **Lookup Decode** field to filter the results.
- 5. Select the Results Per Page drop-down arrow and select **Show all results**.
- 6. Click **Update Results**.
- 7. Select the Export drop-down arrow and select one of the following export options.
  - Export to Excel
  - Word Document
  - CSV
  - XML

The system saves the file to your **Downloads** folder.

# 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:

- 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.

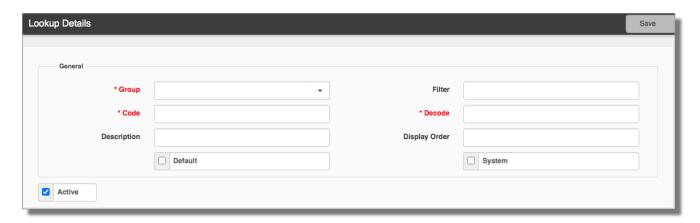
# 2. Add Values to the Lookup Group

Now let's add values to your group.

#### To add values to the new group:

- Go to System Admin > Lookups.
   The Lookups dashboard opens.
- 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.

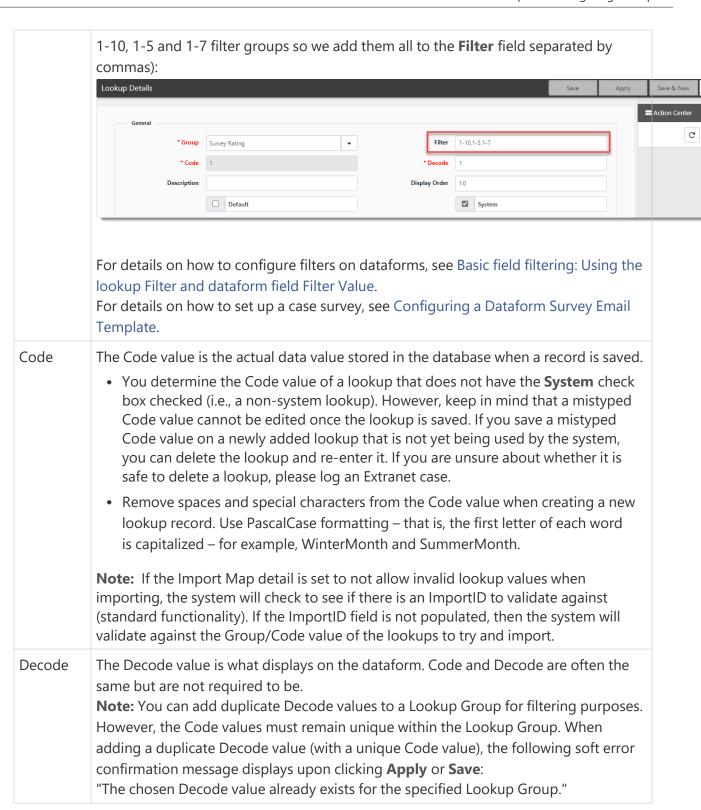
The Lookup Details form opens.



## 4. Complete the form:

**Note:** You may see additional fields on the Lookup Details form which are not defined in the table below. These are metadata fields which can vary as they are unique to the Lookup Group.

Group	Select the new group you just added.
Filter	Filter can further refine the lookups or use a lookup group more flexibly.
	<b>Note:</b> Once configured, you can select filter you want to use in the <b>Filter Value</b> field of dataform properties or in the <b>Response Option</b> field on a Survey Design form.
	For dataforms, a filter can be a word or single characters that represent what you are filtering.
	To specify multiple filter values, enter the list in the <b>Filter</b> field using a commaseparated list with no spaces. For example, South, SE or Purple, JewelTone. 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.
	<b>Note:</b> The <b>Filter</b> field will not accept special characters (with the exception of commas used to specify multiple filter values).
	For survey ratings, filters represent the rating scale of the <b>Survey Rating</b> Lookup Group. Assign the survey rating lookup values to a filter group by entering the filter group name in the <b>Filter</b> field. In the example below, we have created filters named 1-10, 1-5, and 1-7. We want the lookup value "1" to be included as a rating value in the



	Click <b>Save Anyway</b> to add the duplicate Decode value.	
Descriptio n	If the Decode value does not provide a logical description of its purpose, then add a description.	
Display Order	<b>Display Order</b> assigns how the values display in the list. Lower numbers display before higher numbers. In the example below, we have 5 items in a lookup list and vare using a display order scale of 1 to 5. The "New" lookup value with a <b>Display Ord</b> of 1 will display at the top of the lookup list while the "Complete" lookup value with a <b>Display Order</b> of 5 will display at the bottom of the list.	
	Value	Display Order
	New	1
	In Progress	2
	Deferred	3
	On Hold	4
	Complete	5
	<ul> <li>You do not have to use consecutive numbers from 1 to 5 as we did in the scenario above. The numbers just need to reflect a progression from lowest to highest. For example, you could have used 10, 20, 30, 40 and 50 to achieve the same result.</li> <li>If no Display Order is defined, the value does not populate the lookup list.</li> <li>This Display Order is also used to determine the order of values on the Progress Bar widget. Lookup values with no Display Order defined do not display on the Progress Bar. See Widget: Progress Bar.</li> </ul>	
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.

**Note:** If the Import Map detail is set to not allow invalid lookup values when importing, the system will check to see if there is an **ImportID** to validate against (standard functionality). If the **ImportID** field is not populated, then the system will validate against the Group/Code value of the lookups to try and import.

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.

## **Related Topics:**

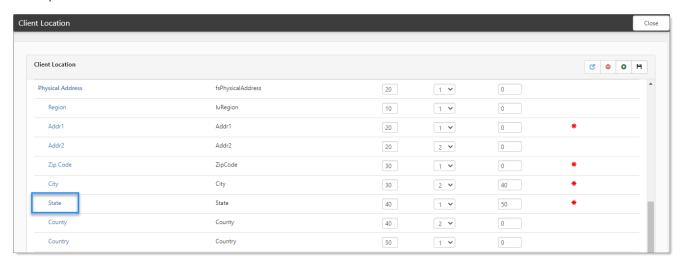
• Lookups with Metadata

# Configuring Dataform fields to use Lookups

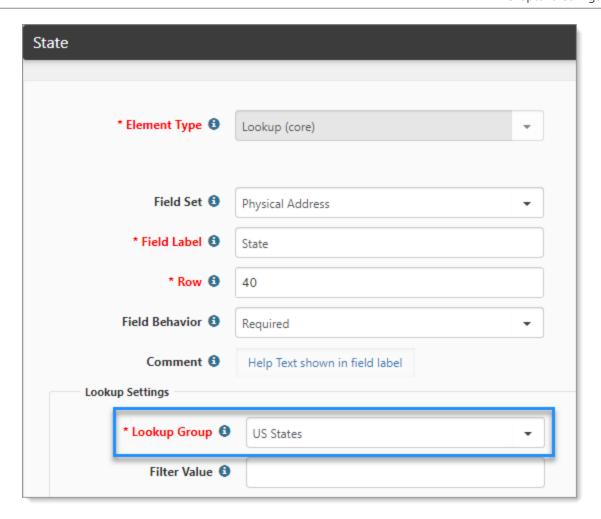
After the group and values are defined, the next step is to connect a field that uses lookups to the new group. The following procedure and subsequent topics use the dataform Client Location and the field State. The State field uses a lookup group **US States**. This topic guides you through configuring a dataform field to use a lookup.

#### To configure a dataform field to use a lookup:

- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Locate the dataform and double-click the row or click (Open).
   The Dataform Properties form opens. Our example uses the Client Location dataform.
- In the Action Center, click Fields.
   The dataform fields are displayed. Our example configures the dataform field State to use a lookup.



- 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.
- In Lookup Group, select the group.
   Our example shows that we selected US States as the Lookup Group.



#### 6. Click Save.

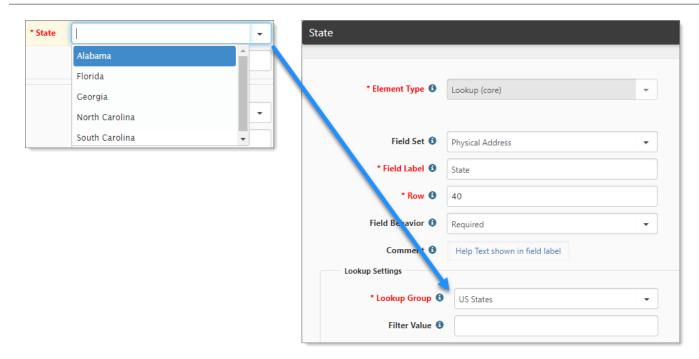
The next step is to reload the dataform to use the new lookup settings.

#### To reload the dataform:

On the dataform, on the Action Center toolbar, click C (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

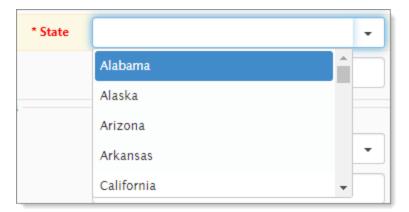
ClientSpace provides lookup *field* filtering, which allows you to reduce the number of value choices selected from a dataform field. This is accomplished using the Filter field on the Lookup Details form. You can use the Filter field to filter the dataform field using either a straightforward basic 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.

**Note:** You can add a Lookup Group from Dataform Field Administration (**System Admin** > **Advanced** 

- > Dataform Admin> Action Center
- Fields) or from Lookup Groups
   Management (System Admin > Lookups > Manage Groups). See

Adding Dataform Fields and Configuring lookups.



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.

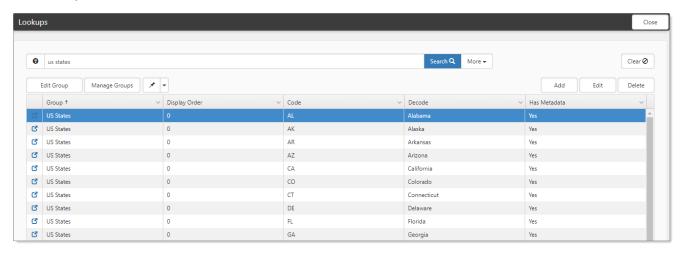
Now let's step through the procedure for configuring basic *field* filtering using the Filter value in the lookup details. For our example, we use Florida and assign a value to indicate a geographic region.

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:

- 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.

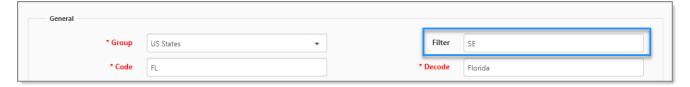


3. Open a state.

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.



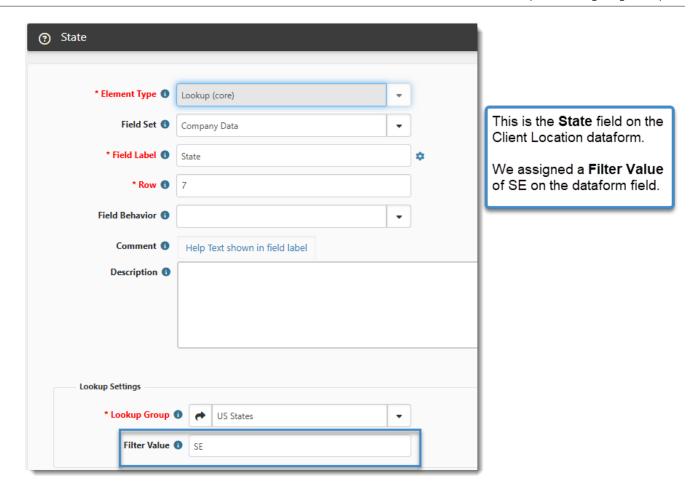
- 5. Click Save.
- 6. Repeat this process for each of your lookups. For this example, US States, we need to assign an appropriate Filter value to each state (such as, SE, NE, or MW). For your lookup group and values, apply the same approach.

## 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:

- Return to the field configuration. Go to System Admin → Advanced > Dataform Admin > Fields.
- Open the field in question, and in Filter Value, enter a value.Our example shows the State field with SE in Filter Value.



#### 3. Click Save.

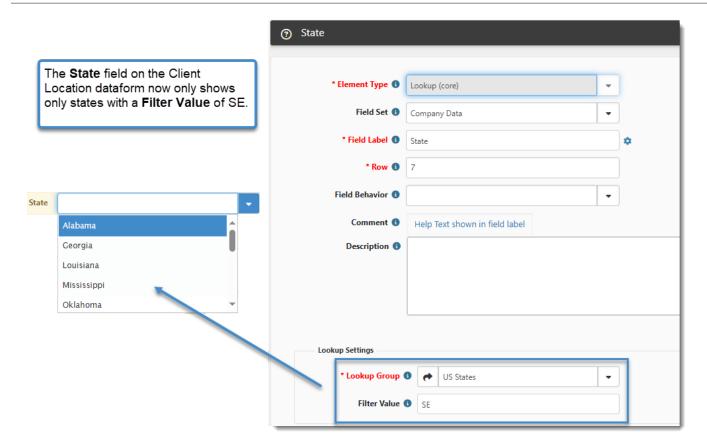
The next step is to reload the dataform to use the new lookup settings.

#### 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.

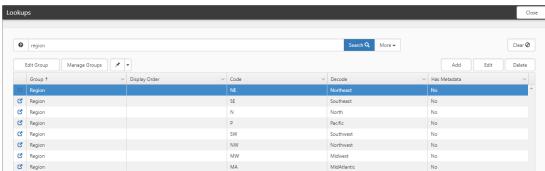
# Advanced filtering: Using contents of another field and Filter Source

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), Lookup Type Ahead (core), and Lookup - Multiple (core) datatypes.

To guide you through this process, we configured a new lookup group *Region*, and a set of lookup values for this group.



Note: You can

add a Lookup Group from Dataform Field Administration (**System Admin** > **Advanced** > **Dataform Admin** > **Action Center** > **Fields**) or from Lookup Groups Management (**System Admin** > **Lookups** > **Manage Groups**). See Adding Dataform Fields and Configuring lookups.

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.

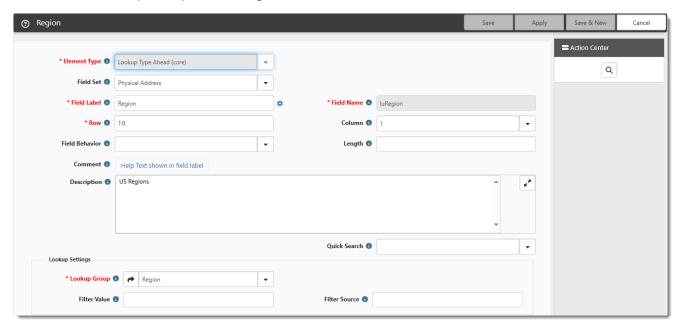
### 1. Add a new dataform field

Our example uses a new dataform field named Region.

#### To add a new dataform field:

- 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 or multi-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*.

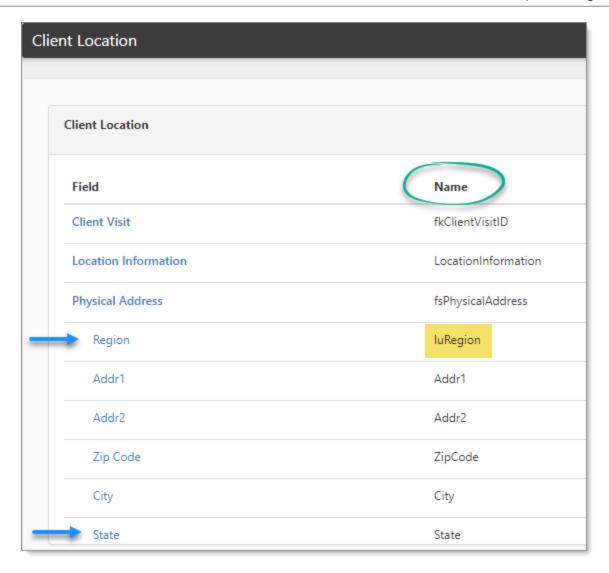


5. Click Save.

## 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*.

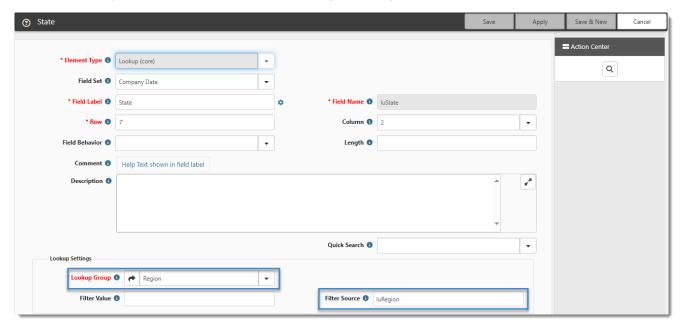


- 2. Open the related field (field B, which in our example is *State*). The field configuration form opens.
- In Filter Source, paste the copied value.
   Our example shows that we pasted *luRegion* in the State field Filter Source.

#### Note:

- If you are configuring a multi-lookup field, you cannot set another multi-lookup field as the **Filter Source**. You can only set another standard lookup field as the **Filter Source**.
- You cannot use a field name that does not exist on the dataform as the **Filter Source**.
- If you change multi-lookup field filter settings after a user has already made a dataform selection using a value that no longer displays, their selection will be preserved. However, if they delete the selected value from the field, they will not be able to reselect it as it will no

longer appear in the list of available choices. (This does not apply to the Lookup (core) and Lookup Type Ahead datatypes. For those datatypes, if the filter settings are changed, a user's selection may be cleared if the new filter settings no longer contain their selection.)



### 5. Click Save.

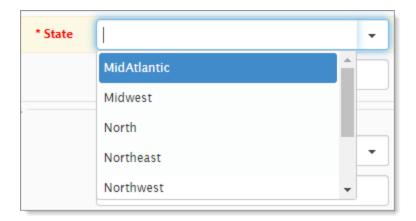
The next step is to reload the dataform to use the new lookup settings.

#### To reload the dataform:

• On the dataform, on the **Action Center** toolbar, click (**Reload**).

### See it in action

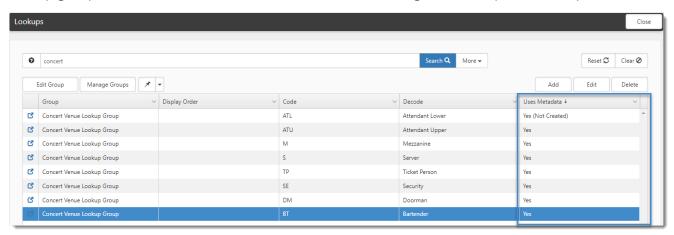
Now let's see this in action. With the new configuration, the value selected in the Region field filters the list of available values in the State field of the same form. The Client Location dataform field for *State* now presents a new list of values – the Region values of MidAtlantic, Midwest, North, 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 value. 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 forms store information related to the lookup values used with the lookup group.

The **Uses Metadata** column shows whether a lookup has a metadata dataform associated with its lookup group and whether associated metadata has been configured for a specific lookup value:



Three possible values can display in the **Uses Metadata** column:

Value	Definition
No	There is no metadata associated with the lookup.
Yes (Not Created)	There is metadata associated with the lookup but it is not configured.
Yes	There is metadata associated with the lookup and it is configured.

**Note:** If you delete a lookup value, the associated metadata is deleted with it.

### **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** lookup 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.

The **Survey Rating** lookup group is automatically linked to a Survey Metadata dataform. It contains a single field named **Survey Rating (Integer Only**). The field is used to store the integer equivalent of a survey rating value. This allows you to store survey results as numeric value (i.e., integer) metadata and use the metadata for calculations in Business Intelligence reports.

For example, if four survey recipients select 10 on a 1-10 point star rating scale, an integer value of 10 is associated with their selections. If another survey recipient selects 3, an integer value of 3 is associated with their selection. You can then use the integer metadata to calculate an average score of 8.6.

If you need help configuring 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:

- 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.

1	Calaat	:+		ءاء ااء	Canuala
4.	Select a	an item	and d	JIICK	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

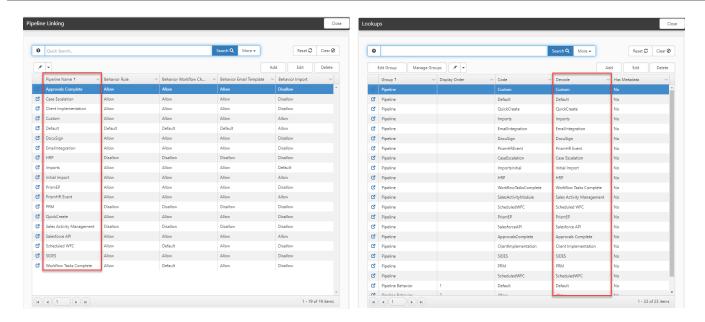
# **Configuring Pipeline Linking**

The Pipeline Linking table (**System Admin** > **Pipeline Linking**) allows Global Administrators to define which Pipeline Behaviors can be applied in the following functional areas: Rules, Import Mapping, Email Templates and Workflow Channels. You define which behaviors can be applied by reviewing each Pipeline record in the Pipeline Linking table and setting a behavior for each functional area within the selected Pipeline.

Upon updating a record, the Pipeline Linking table filters the **Execution Pipeline** field in each of the aforementioned functional areas using the Pipeline Behavior designations you set.

This change will not impact existing **Execution Pipeline** entries until you edit the entries. For instance, if you were to remove an **Execution Pipeline** entry from a Workflow Channel that now has been assigned a Workflow Channel behavior of Disallow, upon save you will not be able to add it again as it will be filtered out of the **Execution Pipeline** list. Alternatively, if that same pipeline had been assigned a behavior of Allow or Default and you removed it, you would still be able to select it from the **Execution Pipeline** list.

The Pipeline Linking table includes preloaded **Pipeline Names** that match the current Pipeline Lookup **Decode** names in the Lookups table as illustrated in the graphic below:

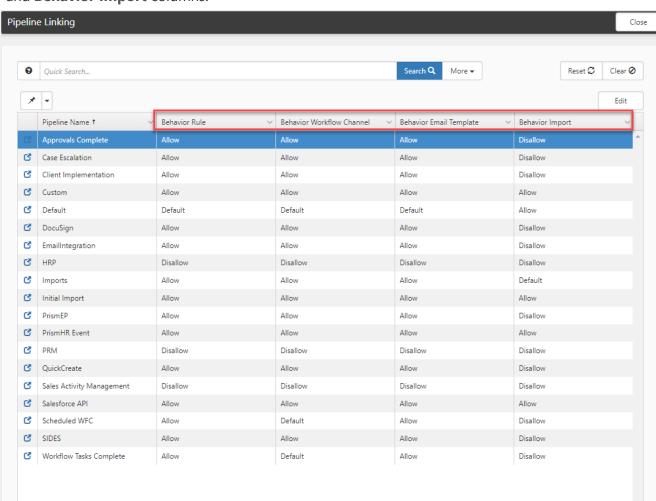


If you have custom pipelines, our Professional Services staff can assist you in adding them.

### To configure Pipeline Linking behaviors:

1. Go to System Admin ♥ > Pipeline Linking.

The Pipeline Linking dashboard opens. From here, you can review the preloaded behaviors and edit each pipeline's functional area (Rules, Workflow Channel, Email Template, and Import) represented by the **Behavior Rule**, **Behavior Workflow Channel**, **Behavior Email Template**,



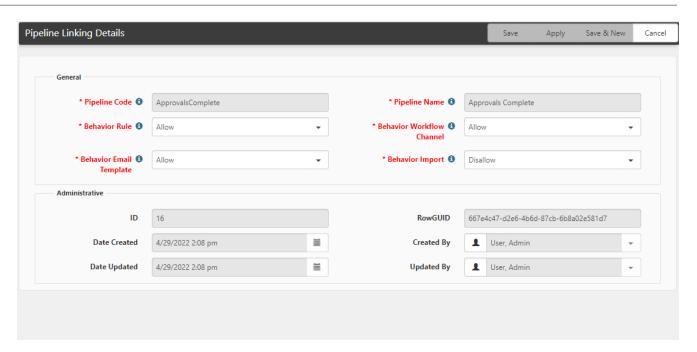
### and **Behavior Import** columns.

2. To edit pipeline behaviors, double-click the selected row or click (Open) next to a Pipeline Name.

The Pipeline Linking Details form opens.

H (1) H

1 - 19 of 19 items



Edit the Pipeline Behavior fields for the functional areas shown by selecting the appropriate option:

Pipeline Behavior	Definition
Default	Pipelines assigned to use this behavior auto-fill the <b>Execution Pipeline</b> field by default.
	Note: The Execution Pipeline fields in the Rules, Email Templates and Workflow Channels areas are multi-select fields. Therefore, you can specify unlimited default pipelines. The Import Mapping area, however, is not a multi-select field. Only one default pipeline can appear in the Execution Pipeline field and validation is in place to prevent more than one lookup from being assigned as the default behavior for Import Mapping.
Allow	Pipelines assigned to use this behavior do not get added to the <b>Execution Pipeline</b> by default. Instead, they are made available in the <b>Execution Pipeline</b> list for selection.
Disallow	Pipelines assigned to use this behavior cannot be added and are excluded from the available selections in the <b>Execution Pipeline</b> list.

### 3. Click Save.

You are returned to the Pipeline Linking dashboard.

What's next? Remember: Existing entries in the Execution Pipeline fields of Business Rules, Workflow Channels, Email Templates, and Imports are not affected by Pipeline Linking configuration changes. Review these forms and edit them as necessary to match the newly configured pipeline behaviors. The Execution Pipeline fields of any new Rules, Workflow Channels, Email Templates, and Imports that you create will auto-fill with pipelines designated with a Default behavior and any pipelines assigned a behavior of Allow can be selected and added manually.

### **Related Topics:**

- Configuring Rules and Business Logic
- Step 1: Channel
- Step 1: Initial
- Configuring the Email Integration Reply Template
- Configuring the Import Map Header

# Chapter 8

# **Configuring Custom Dataform 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 configured links creative use 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.

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 learn how you can configure link security, see Configuring Link Security.

### To configure and manage custom dataform links:

- Go to System Admin > Advanced > Custom Links.
   The Configure Links dashboard opens. To search the list, see Searching Custom Links.
- 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 <b>Workspace Dataform</b> is selected, <b>Linked Field</b> becomes available.
Group	Denotes the type of link you are creating and drives the other fields on the form to complete the configuration:

	<ul><li>Action</li><li>Report</li><li>Link 1</li><li>Link 2</li></ul>	
Sort Order		tion Center Workflow Actions first, then s. The Sort Order determines how the yed within the groups.
Display Action	Lists the possible actions for the selected link Group. Display Actions are based on the Group selection.	
	When <b>Group</b> = <b>Action</b> , the Display Actions are:	<ul> <li>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.</li> <li>Submit w/Action: Generates a         HdrAction on the page to trigger         rules or workflow. Enter this         HdrAction in Code Value.</li> <li>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.</li> <li>Submit w/Action (close and         refresh): Generates a HdrAction on         the page to trigger rules or workflow,         and after generated, the page closes         and the list containing the record the         action occurred on is refreshed. Enter         this HdrAction in Code Value.</li> </ul>
	When <b>Group</b> = <b>Link1</b> or <b>Link2</b> , the Display Actions are:	<ul> <li>Custom Function: Call a custom JavaScript function (requires additional coding by our</li> </ul>

- 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.

# When **Group** = **Report**, the Display Actions are:

- Run Report: This

   is the Report or

   Merge that
   executes when
   you select the link.
  - Run Report enables the Report/Mer ge field.
- Run Bl Report:

This is the link displayed in the Action Center.

- Run
   Bl Report
   enables the
   Report
   field. Select
   from a list
   of available
   target Bl
   reports.
- BI Report links can use CurrentUse r, RecordID, and CurrentWor kspace filtering.
   See Creating Links for

**Business** 

	Intelligence Reports.  Open Filter Page: This is the link 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 <b>Location</b> dataform and the <b>Target Dataform</b> . 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.
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 generally do not 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 database's actual record exists. 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 <b>Display this link when adding</b> 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. 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. To add link security, click the **Security** icon in the Action Center to access the Security Roles window where you can add one or more roles and secure the custom link to unlimited roles. For details on how to configure link security, see Configuring Link Security.
- 6. Click **Apply** or **Save**.

### **Related Topics:**

• Custom Dataform Links to Try: Related Companies

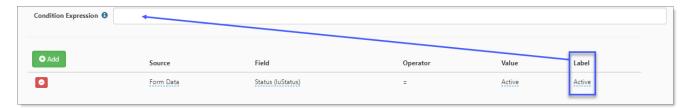
## Configuring Link Display Conditions

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	<ul> <li>This is where the system looks to find the trigger value that matches your condition.</li> <li>The options are:</li> <li>Form Data: The system looks at the dataform to find the triggering field and value.</li> <li>Header Proc (1 or 2): The system runs a stored procedure when the dataform opens. Can pull information from other dataforms in the system.</li> </ul>
Field	This is the field that is interrogated for the trigger <b>Value</b> . 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 combination of the <b>Source</b> and the datatype of the selection in <b>Field</b> . For instance, when <b>Source</b> equals Form Data and the <b>Field</b> is from a parent form (which means its datatype or <b>Element Type</b> in Dataform Admin is "Parent Form"), the options available in the <b>Operator</b> field are Empty, Not Empty, Equals, and Not Equals.  The complete list of possible operators is 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 ( <i>Empty</i> ) when triggering links from Form Data, enabling display conditions when a field is empty. Blank is only valid when the Source is <b>Form Data</b> .
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 Custom Links

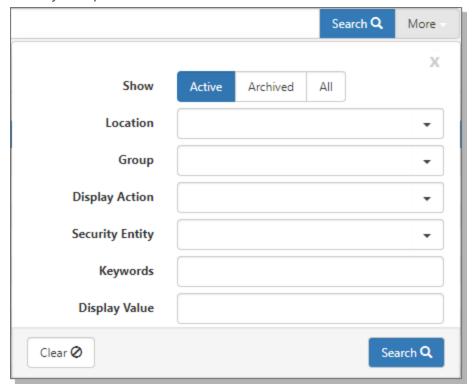
From the Configure Links dashboard, you can search using Quick Search and More search. The search looks for matches in the Location, Display Value, and Display Action columns.

### To search the Configure Links dashboard:

- 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).

## Custom Dataform Links to Try: Related Companies

The **Related Companies** link is a very helpful custom dataform link to add to your Client Master dataform. The **Related Companies** link displays a popup of all companies related to a single parent company and allows you to jump to the Client Master record of a related company.

**Note:** Advanced administrative access is required to set this link up, inactivate this link, or move this link. If you need assistance setting up this link, please enter an extranet case.

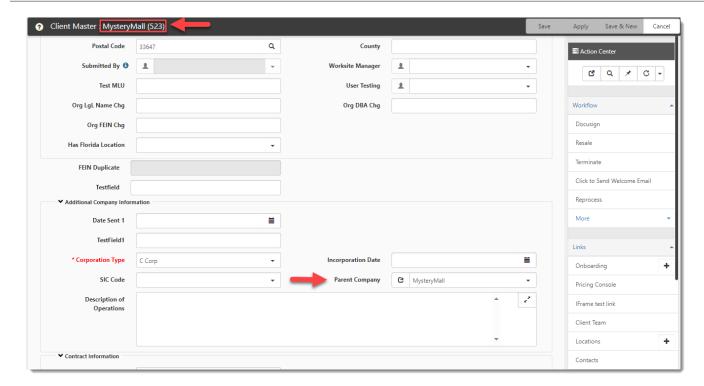
Here's how it works!

First your Global Administrator must configure the **Related Companies** link to display on the Client Master dataform (see Configuring Custom Dataform Links).

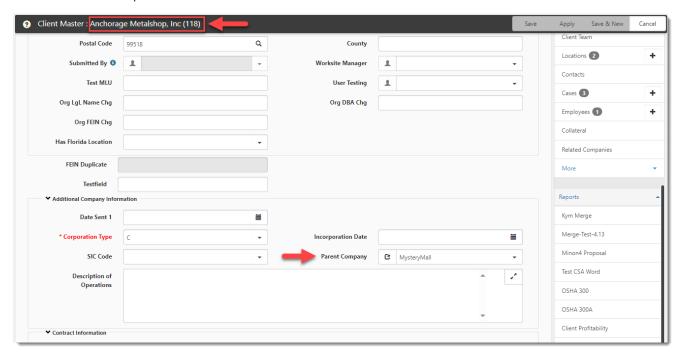
Then, for ClientSpace to display related companies, you must identify parent and child relationships for your companies. This is easily and quickly done on the Client Master dataform.

Identify a parent company by setting the **Parent Company** field of a parent company to itself.

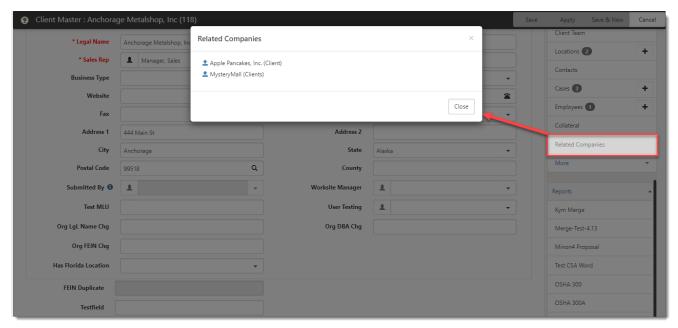
In the example below, we have opened the Client Master record of a fictitious company named MysteryMall and have set the **Parent Company** field to MysteryMall:



Then, we set the **Parent Company** on the Client Master of other child companies to MysteryMall as shown in the example below:



Now, when we click the **Related Companies** link on the Client Master record of the parent or child records, a list of related companies displays:



Clicking the up arrow 2 next to a related company in the list opens the Client Master record.

### **Related Topics:**

- Configuring Custom Dataform Links
- Searching Custom Links

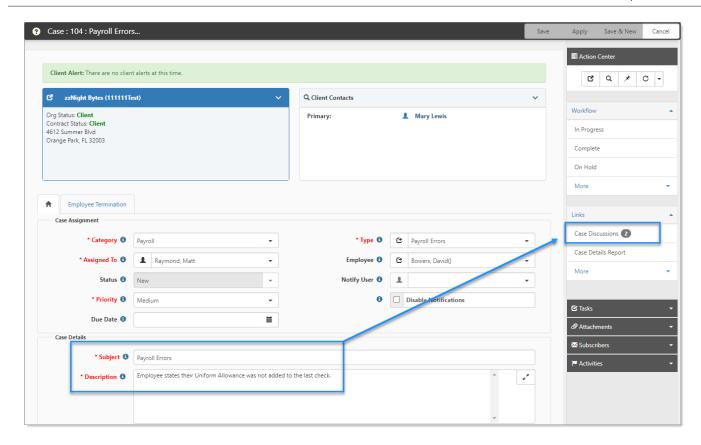
# Chapter 9

## 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.

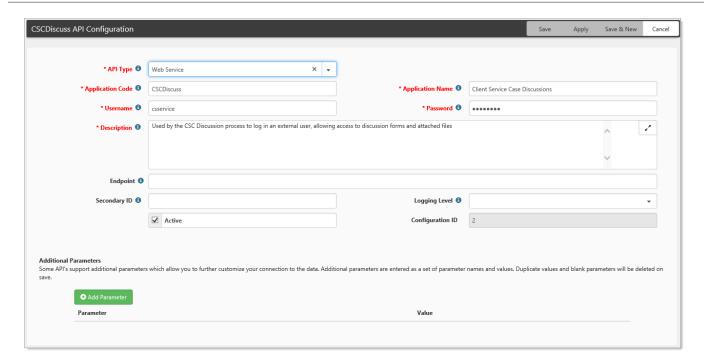
## Configuring client service case discussions

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:

- 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.

АРІ Туре	Select Web Service.
Application Code	Select <b>CSCDiscuss</b> .
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**

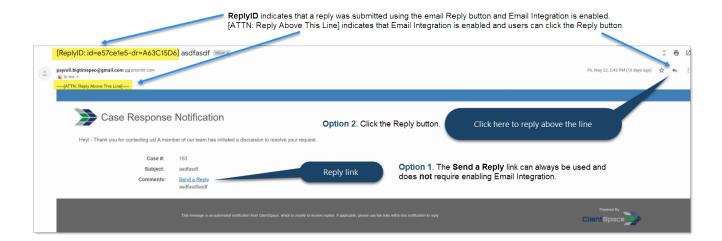
Case Discussions use email templates to send the content of the Discussion Message to the designated recipients. The email templates that make this happen are CSCDISC: Case Discussion, CSCRPLY: Case Discussion Reply, and CSCDISCNEW: Case Discussion New. ClientSpace administrators can configure these 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.

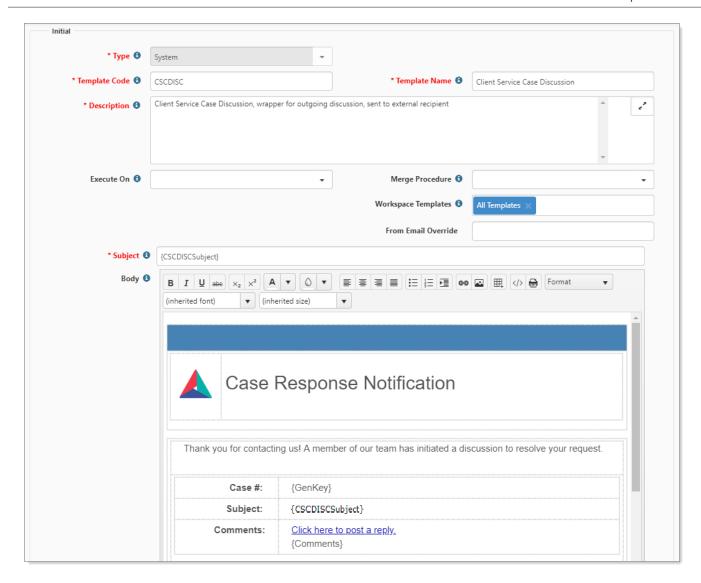
### Accessing the email templates

#### To access the email templates:

- 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 prepopulated 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 <b>CSCDISC</b> for this template.
Template Name	Use Client Service Case Discussion.
Description	Use Client Service Case Discussion, wrapper for outgoing

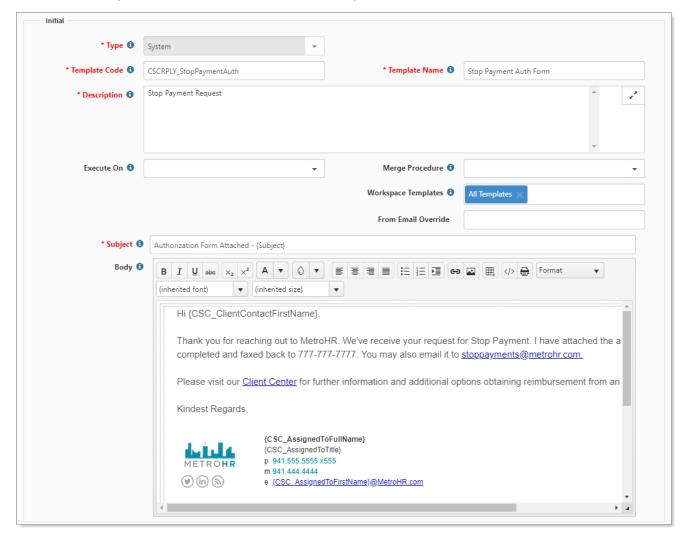
	discussion, sent to external recipient.
From Email Override	Specify an email address to override the default noreply address commonly used by the system. The default Admin Email configuration is stored in App Settings. For help configuring this setting, log an Extranet case.
Subject	This field indicates the subject line for the email that the system generates by using this template. You can enter text and you can configure the subject by using replacement fields.  By default this field contains the {CSCDISCSubject} replacement field.  The system uses this replace field to pull the subject content from the case discussion message that triggered the email. With this replacement field, the system can use the same subject for the discussion message and the initial email that the system sends.  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.  Note: You can use the {PreviousMessages} replacement field in the body of the email template. Important: You should place the {PreviousMessages} replacement field on the bottom line of the body in the email template so that the previous messages display after the

### 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.



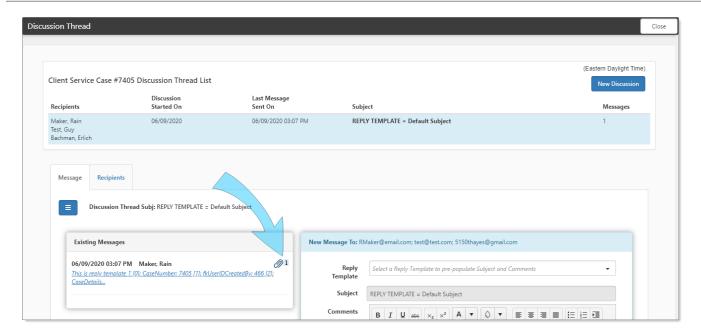
### To configure the email template for CSCRPLY:

Complete the form fields.
 If you are adding a CSCRPLY template, for Type, select **System**.

Туре	Select <b>System</b> .
Template Code	Template code must begin with <b>CSCRPLY</b> 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 <b>WorkspaceName</b> - <b>Template Subject Line</b> . 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**.

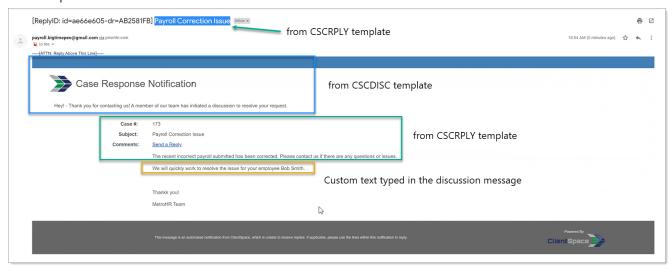
When viewing the Discussion Thread, a counter indicates if any attachments are present.



### 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.

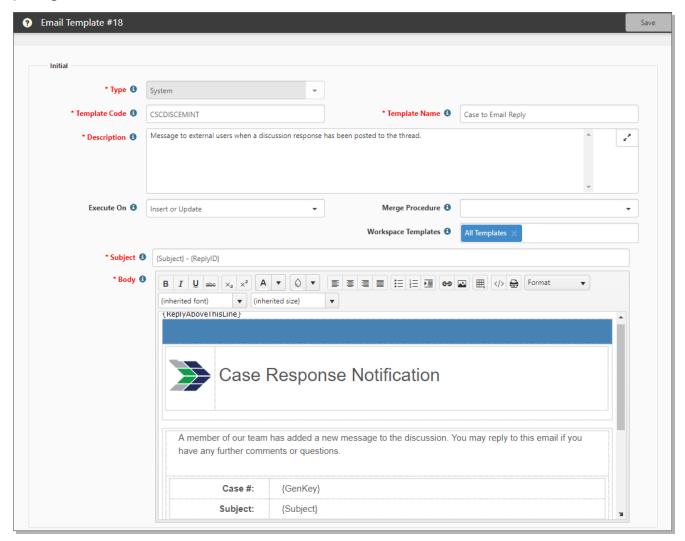
- CSCDISC is the standard template
- CSCRPLY is the reply template
- The customized message entered in the discussion New Message box appears below the reply template content.



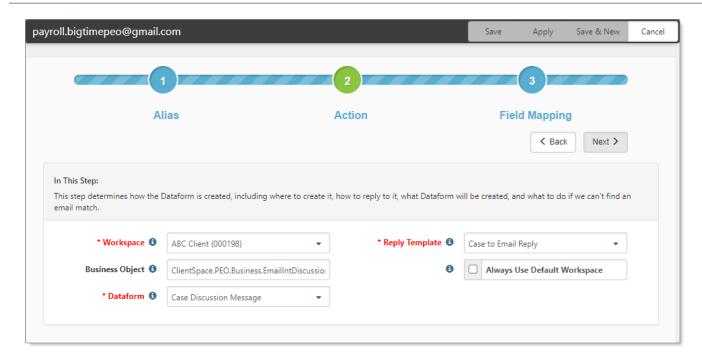
### CSCDISCEMINT: Case to Email Reply

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.



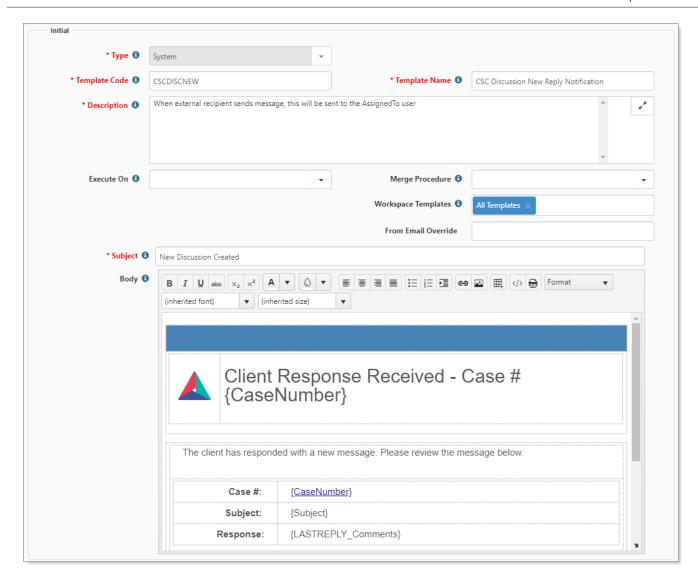
This template is referenced in the Email Integration record, in the Action step. The template is included in the standard PEO installation.



### **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 <b>CSCDISCNEW</b> 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 <b>New Discussion Created</b> . This is the subject line of the inbound email, which can be configured.
Body	This is the contents of the inbound 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. Body can be configured using the following field replacements:
	• <b>{LASTREPLY_Comments}</b> - Include to capture the response from the external user in the discussion.
	<ul> <li>{LASTREPLY_FromEmailAddress} - Include to capture the sender email address on email replies to case discussion emails.</li> </ul>
	<ul> <li>{LASTREPLY_FromName} - Include to capture the sender First and Last name separated by a space on email replies to case discussion emails.</li> </ul>
	<b>Note:</b> You can use the {PreviousMessages} replacement field in the body of the email template. <b>Important</b> : You should place the {PreviousMessages} replacement field on the bottom line of the body in the email template so that the previous messages display after the current message.

### 2. Click Save.

### 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.

{ClientNumber} {PEOID}	
------------------------	--

{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}
{CSCDISCSubject}	

## 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

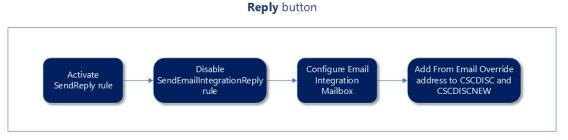


mailbox Reply button, as you would normally reply to any email message. When you type the response and send it, the message is integrated with the ClientSpace case discussion thread.

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.



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:

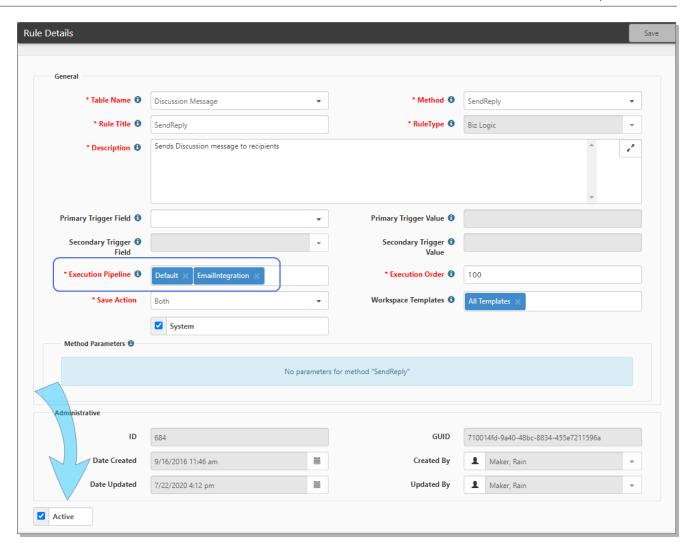
- Go to System Admin → > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- 2. Filter the list for the Table Name Case Discussion Message with the Rule Title SendReply and click (Jump).

The Rules Detail form opens.

3. Complete the fields:

Execution Pipeline	Select <b>Default</b> and <b>EmailIntegration</b> .
Active	Select this option to enable the rule.

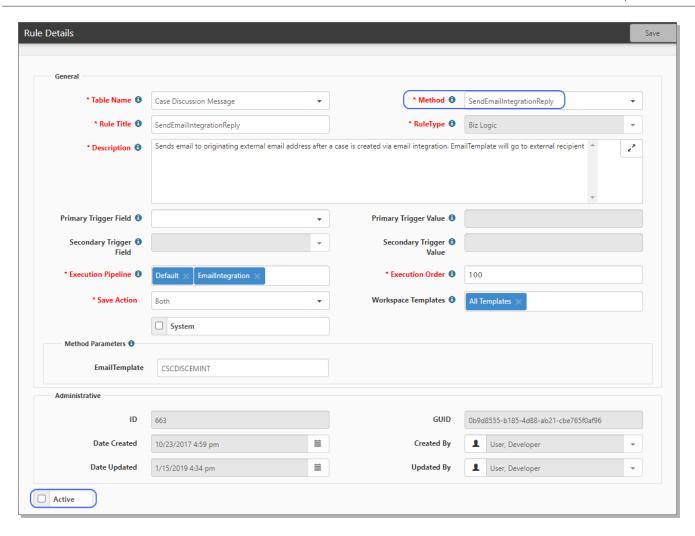
4. Click Save.



Next, you must disable SendEmailIntegrationReply.

#### To disable SendEmailIntegrationReply:

- Go to System Admin → > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- 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.



#### 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.

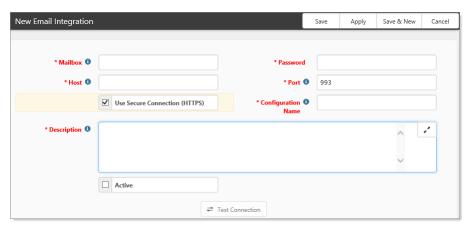


Our example shows a mailbox with a Username payroll.bigtimepeo@gmail.com. We will refer to this email address in the next step.

#### To configure the mailbox:

- 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

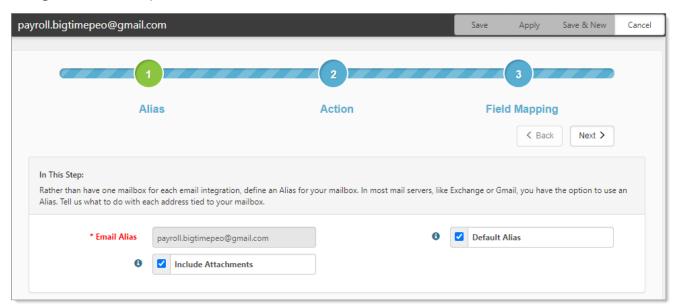
	like to integrate. Email addresses are case insensitive and must be in a valid format. This address must be attached to a supported email provider (such as Gmail, AOL). The address must be an actual email address associated with this mailbox and not an alias for the mailbox.  Later in the configuration 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 <b>Test Connection</b> 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.

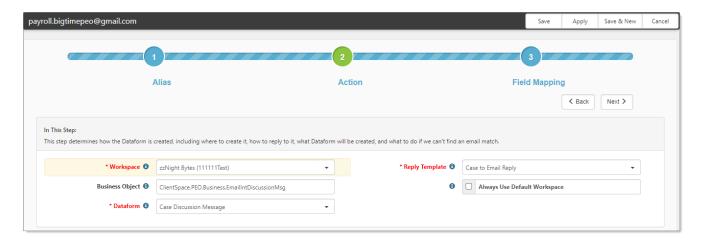
- 4. Select **Active**. This enables the Email Integration.
- 5. Click **Apply**.

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**.

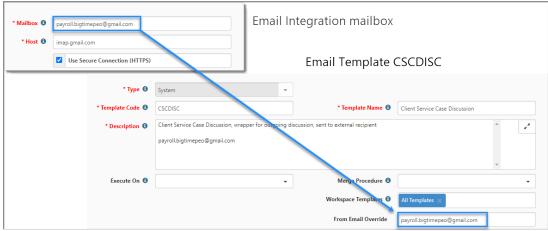
Workspace	Required. Contains the workspace that will be used by this email alias for the dataform creation if no matches for the sender's address are found. This is the default workspace used during the processing of the email. This value may be overridden by including the workspace in the body of the 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 <b>Workspace</b> 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 <b>Case Discussion Message</b> .

9. Click **Save**. You do not need to complete the Field Mapping step.

#### **Step 3: Configure the Email Templates**

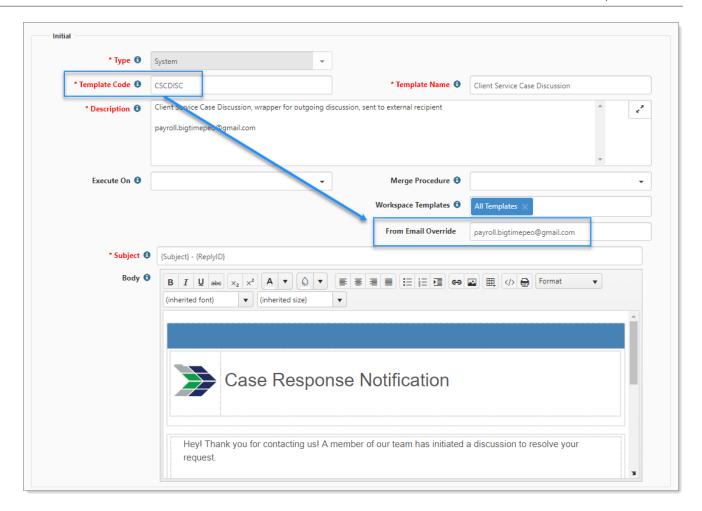
The email templates for case discussions are CSCDISC: Case Discussion, CSCDISCNEW: Case Discussion New, and CSCRPLY: Case Discussion Reply. These templates are already configured for



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:

- 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:

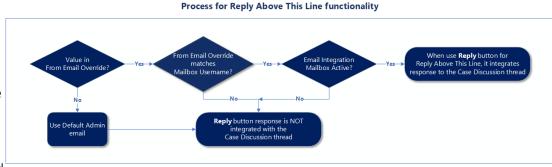
- Go to System Admin > Advanced > Scheduled Processes.
   The Scheduled Processes Admin dashboard opens.
- Open Process Email Integration (click ☑ (Jump)).
   The Process Email Integration form opens.
- Review the Frequency, Frequency Type, and Valid Days.
   Typically, you want this to run every minute, every day of the week.



4. For any changes, please log an Extranet case.

#### Reviewing how this works

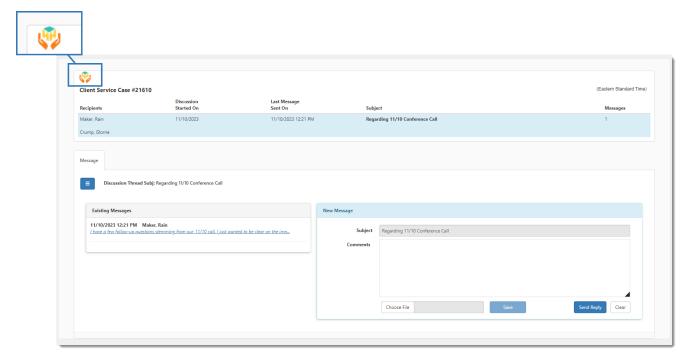
This diagram illustrates the ClientSpace process to determine if case discussions are integrated into the case discussion thread



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 Case Discussion Thread Logo

Optionally, you can add a logo that displays in the upper left corner of the discussion thread.



#### To configure the logo:

- Go to System Admin → > Administrative Data > PEO Configuration.
   The PEO Configuration form opens.
- 2. Complete the following fields in the "PEO Feature Administration" section.

Discussion Logo	Select your logo file.
	<b>Note:</b> You must resize your logo file to the proper display size before uploading the file.
	<ul> <li>a. Click (Upload File).</li> <li>The Upload File dialog box opens.</li> <li>b. Click Choose File.</li> </ul>
	c. Locate the file on your computer and click <b>Open</b> . The file name displays.
	d. Optional: For <b>Description</b> , type a description of the uploaded file.
	e. Optional: For <b>Category</b> , select an entry from the list.
	f. Click <b>Save</b> .
Enable Logo for Discussion	Click the <b>Enable Logo for Discussion</b> checkbox.

#### 3. Click Save.

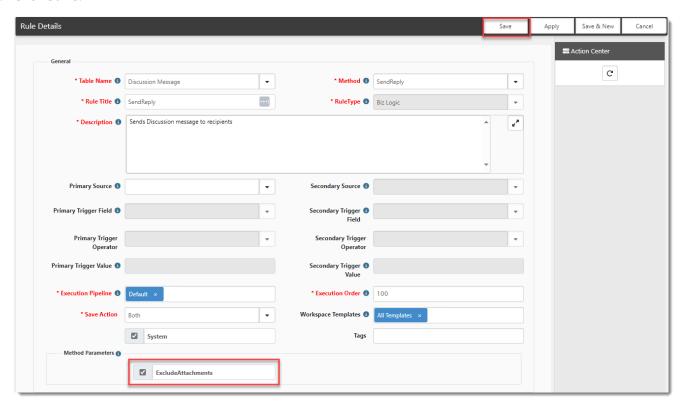
## Configuring "Exclude Attachments" Functionality

Optionally, you can set up the **SendReply** OR **SendEmailIntegrationReply** business rule to suppress attachments on case discussions.

**ALERT:** SendReply and SendEmailIntegrationReply business rules are not compatible with each other. SendEmailIntegrationReply is used for the original version of the Case Discussions. It embeds a Send a Reply link in the email message. The newer SendReply business rule still supports the embedded Send a Reply link in the email message but also adds a "Reply above this line"/ Reply button at the top of the case discussion email thread. (See Configuring Case Discussion: Reply Above This Line for more details.) When configuring "Exclude Attachments" functionality, make sure you are configuring it only on the business rule your company uses.

#### To configure "Exclude Attachments":

- Go to System Admin > Advanced > Manage Rules.
   The Custom Logic Rules dashboard opens.
- Filter the list for the Table Name Discussion Message, highlight the Rule Title SendReply or SendEmailIntegrationReply as applicable and then click ☑ (Jump).
   The Rules Detail form opens.
- 3. Under Method Parameters, click the ExcludeAttachments checkbox to place a check mark in it.
- 4. Click Save.



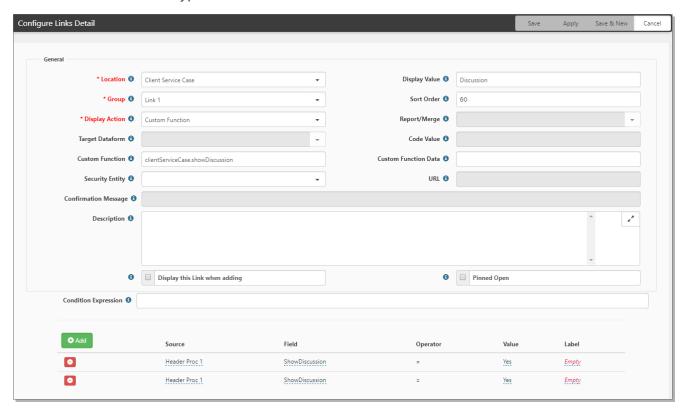
# Configuring the Discussion Links

#### 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

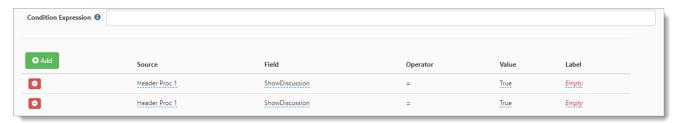
1. In Custom Function, type clientServiceCase.showDiscussion.



## **Link Display Condition**

If both the Case AssignedTo user and the Associated Contract on the case have an email address:

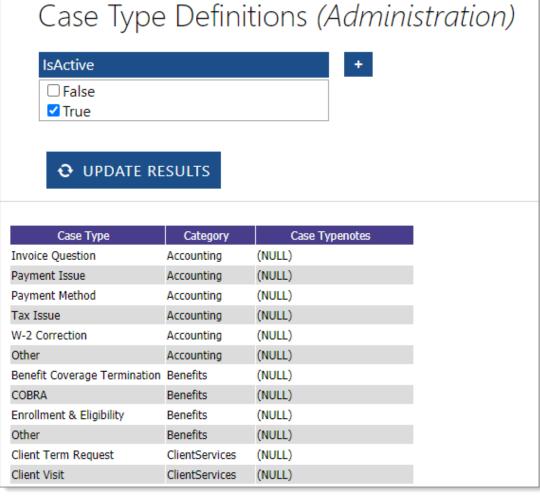
1. Set **Show Discussion** to **True**.



# Finding your case types

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



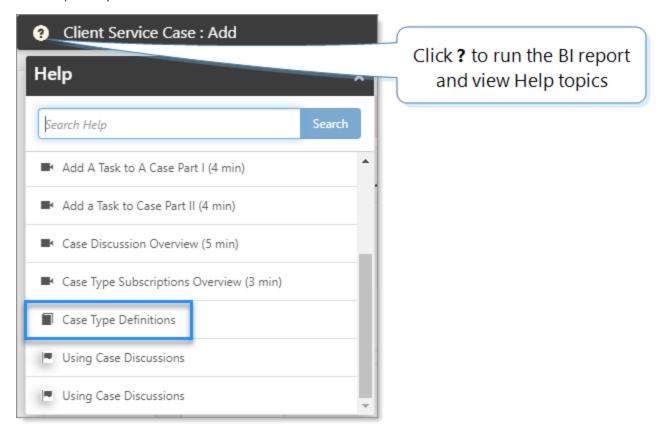
Admin can save the report as a new report and make the necessary changes.

#### To run the report from BI:

- On the modules bar, click Bus Intelligence.
   Business Intelligence opens in a new tab.
- In the left pane, select **Administration**.
   The Case Type Definitions report appears.
- Click Case Type Definitions.The report opens.

#### To run the BI report from Client Service Cases:

- On the modules bar, go to Workspaces.
   The Workspace Search dashboard opens.
- Select a Workspace and click (Jump).
   The Workspace opens.
- 3. On the **Client Service Cases** widget, click Q (**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 Client Service Case Type (**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**.

There is more than one way to access the Admin Workspace:

- From the modules bar, click QWorkspaces.
   The Workspace Search dashboard opens.
- Type "Admin" in the search box to filter the list of workspaces and locate Admin Workspace.

OR

- On the modules bar, on the right side, click <username> > Modules.
   The Modules Search dashboard opens. The Admin Workspace is listed at the top of the dashboard.
- 2. In the Search for Dataform section, search for Client Service Case Type or select Client Service > Client Service Case Type.

The Client Service Case Type dashboard displays.

- 3. Click **Add** to add a new case type or click **Edit** to update an existing case type. The Client Service Case Type form opens.
- 4. Complete the form as required:

Fieldset	Field	Description
Case Type Details	Title	Enter a title for the Case Type.
	Category	Select a category for the Case Type.
	Secure	When the Case Type is secured, the system generates a CaseType_#TypeName# security entity that can then be used to provide secure case type access to users other than those directly associated with the Case Type. (The <b>Assigned To</b> user as well as Users in the <b>Notification</b> role, <b>Escalation Level 1</b> or

Fieldset	Field	Description
		<b>Escalation Level 2</b> roles always have rights to the case regardless if it is a secure case type.) Refer to Case security for additional details.
	Generates Distress Call	Configured Client Service Case Types that have the <b>Generates Distress Call</b> option selected automatically creates a Client Rescue record and relates it to the case. The Owner of the Client Rescue record is determined by the user who is defined in the <b>Distress Call Owner</b> role. This role should only contain one user.
	Default Subject	The <b>Default Subject</b> 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 <b>Default Issue</b> 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.
	Case Type notes	Enter notes about the case type.
	Disable Notifications	Select the <b>Disable Notifications</b> option to disable notifications to users or roles associated with the case type.
	Due Date Offset	The <b>Due Date</b> on the case is can automatically set using the <b>Due Date Offset</b> days you enter here.

Fieldset	Field	Description
		For instance, if you want the <b>Due Date</b> on the case to be automatically set as 5 days from the date the case was created or updated, enter 5 here.  ClientSpace business logic applies the <b>Due Date Offset</b> based on Case Type and sets the date automatically on <b>Save</b> if the <b>Due Date</b> field on the case record is currently empty. If the <b>Due Date</b> has been set
	Due Date Offset Method	manually, it will not be overwritten.  Select Calendar Days to calculate the <b>Due Date Offset</b> using calendar days. This method includes non-business days and company holidays in the <b>Due Date Offset</b> calculation.  Select Business Days to calculate the <b>Due Date Offset</b> using business days. This method excludes non-business days and
		company holidays from the Due <b>Date Offset</b> calculation. <b>Note:</b> Business days are as configured in your ClientSpace install settings and company holidays are configured in your Company Holiday table ( <b>System Admin*</b> > <b>Company Holiday</b> ). If you require help with these settings, please log a case with your Professional Services representative.
	Require Employee	When <b>Require Employee</b> is checked, the <b>Employee</b> field on Client Service Case: Add window and the Quick Case window are is required for data entry. The <b>Employee</b> field

Fieldset	Field	Description
		label also displays in red indicating that it is a required field.
	Label Override	Contents of this field will be displayed instead of the Case Type Title when this case type is exposed in PrismHR. If blank the Employee Portal will display the Title of this case type.
Case Type Billing	Billable?	TBD
	Avg. Hours To Complete	TBD
	Cost Rate	TBD
Default Assignment	Default Assignment, Assigned To User, Assigned To Field, Backup Assignment, and Backup Assigned To	Note: The fields in the Default Assignment fieldset change depending on the selection in the Default Assignment field.  When you assign a case, you can specify the Default Assignment as Creator, Single User, or Client Role.  Creator: Defaults the Assigned To user on the case to the person that creates the case.  Single User: Defaults to the user selected in the Assigned To User field.  The Assigned To User field displays as a required field once Single User is selected.  Selecting Single User also causes the required field, Backup Assignment, to display. You can select an assignment type of Single

Fieldset	Field	Description
		User or Client Role.  Once the Backup Assignment is set, the Backup Assigned To field displays. It is also a required field. This is where you select the backup user or role based on the backup assignment type selected.
		<ul> <li>Client Role: Defaults to the user determined by the Client Team role selected in the Assigned To Field.</li> <li>The Assigned To Field displays as a required field once Client Role is selected.</li> <li>Selecting Client Role also causes the required field, Backup Assignment, to display.) You can select an assignment type of Single</li> </ul>
		User or Client Role.  Once the Backup Assignment is set, the Backup Assigned To field displays. It is also a required field. This is where you select the backup user or role based on the backup assignment type selected.  Backup Assignment ensures that if the selected Single User or Client Role is not valid (i.e., is blank, Inactive, or Expired), the case type defaults to a meaningful value

Fieldset	Field	Description
Fieldset	Field	using the following validation order:  Validation Step 1: If the Default Assignment on the Case Type Assignment record is Single User and that user is valid, the Assigned To user on the case displays the default assigned single user.  Validation Step 2: If the Default Assignment on the Case Type Assignment is Single User and that user becomes invalid, the Assigned To user on the case displays the user
		or role from Backup Assigned To field.  Validation Step 3: If the Backup Assigned To field user or role is invalid, the Assigned To user on the case displays the Manager of the responsible department from the Case Type category metadata associated with the case type. For example, if the Category field on the Case Type record for 401K is "Benefits", the system will check the Department Admin/Department Details record for "Benefits" and display the name shown in the Manager field as the Assigned To user on the case.
		<ul> <li>Validation Step 4: If no valid default assignments can be found, the         Assigned To field will be left blank, and the following error message displays when you click Apply or Save on the case: "There is no Assigned To selected and the associated case type does not have a default user selected.     </li> </ul>

Fieldset	Field	Description
		Please either set a default user on the case type or select an Assigned To user. "
Roles	Notification Role	Select the user role that should receive case type notifications on this Case Type.
	Assigned To Field	If a role is selected, when the Case Type is changed on a Client Service Case record, the list of users available in the <b>Assigned To</b> field will be updated to only the users in the configured role.
	Escalation Level 1 Role	This role will be used in the Level 1 escalation of this Case Type.
	Escalation Level 2 Role	This role will be used in the Level 2 escalation of this Case Type.
Case Type Exposure Setup	Case Type Visible to External Users	Exposes the case type to the user for the purpose of Case creation. If this option is not selected, external users do not have this case type as an option when creating a case.
	Allow External Access to This Case Type	Allows External users that are involved in the Case (CreatedBy, AssignedTo, or Owner) access to see and open the Case from the External Case Dashboard. External Case Creators always have access to view the cases they create, if the Case Type remains one which is exposed to external users.
	Expose Case Type in PrismHR	Previously, when this checkbox was checked, it allowed a case type to be selected in the PrismHR Employee portal widget. If checked you could also change the displayed case type title using the Label Override field.

Fieldset	Field	Description
		Now, this field has been replaced by the <b>Expose to Portal</b> field. It no longer determines if a case is used in the PrismHR Employee Portal as of Release 143. The field will be removed from the Client Service Case Type form in a future release.
	Expose Case Type to Quick Case	Check this box to allow this case type to be selected from the <b>Type</b> field of the Quick Case window. (The <b>Quick Case</b> feature is accessible from the Cases dashboard and is used for quickly adding a case using minimal required fields.)
	Case Type Position Tags	Case Type Position Tags allow you to choose which case types are visible to portal users by their PrismHR User Type. Both the Manager and Employee tags are set by default. To display a Case Type to only one group, remove one of the default tags from the Case Type Position Tags field as applicable on each Case Type record.
	Expose to Portal	The <b>Expose to Portal</b> field allows you to identify which case types can be selected in the HCM and/or Prism portals. Select HCM to make the <b>Case Type</b> available for selection in the HCM portal only. Select Prism to make the <b>Case Type</b> available for selection in Prism portal only. Or, select <u>both</u> HCM and Prism to make the <b>Case Type</b> available for selection in both the HCM and Prism portals

### 5. Click **Save**.



#### Video

View the video about Configuring Case Types.

# Configuring case type subscriptions

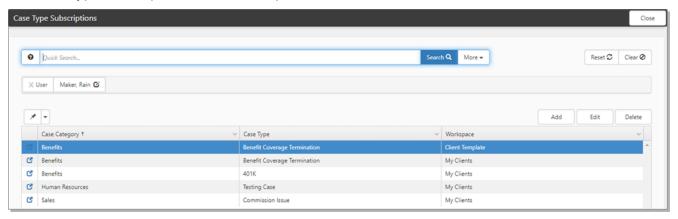
ClientSpace provides the ability to select Case Type subscriptions (within security limits), which means you can subscribe to a given case type and if you have security appropriate to see the case type you will be notified when cases of this type are created. This topic describes Case Type Subscriptions 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. <b>My Clients</b> subscribes to workspace where the selected user is in one of the fields on the <b>Client Team</b> 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.

# **Configuring Case Category Metadata**

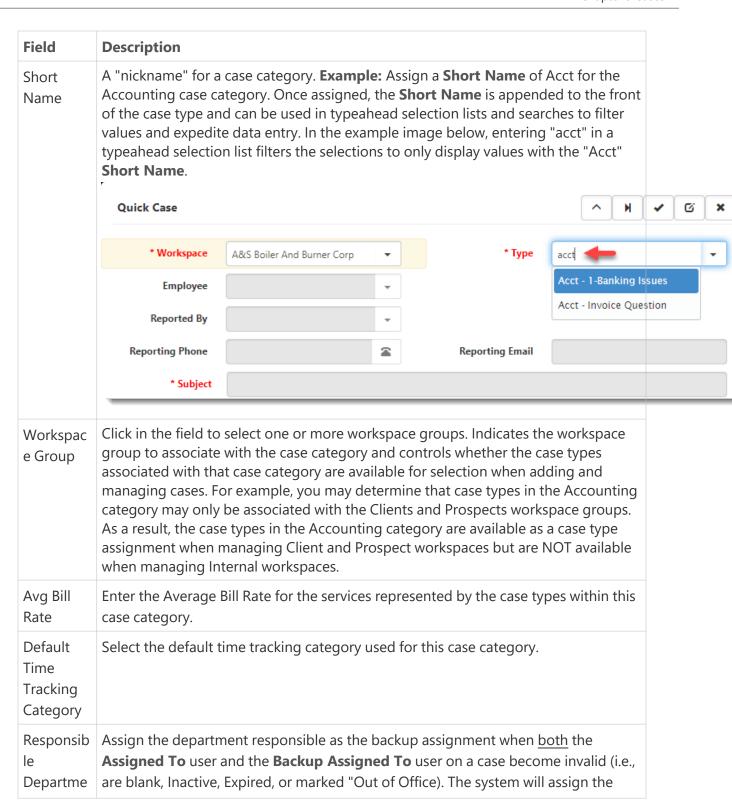
The Client Service Case Category Metadata form allows you to specify metadata that can be used to link case category information directly to a particular code or drive business logic related to cases types within a case category.

## **Adding Case Categories**

#### To add client service case category metadata:

- 1. Go to **Admin Workspace**.
- 2. In the Search for Dataform section, search for Client Service Case Category Metadata or select Client Service > Client Service Case Category Metadata.
  - The Client Service Case Category Metadata dashboard displays.
- 3. Click **Add** to add a new Case Category Metadata record or click **Edit** to update an existing Case Category Metadata record .
  - The Client Service Case Category Metadata form opens.
- 4. Complete the form as required. Required fields are shown in red:

Field	Description
Category	Case type category. <b>Example:</b> Assign all accounting related case types, such as Invoice Question and Banking Issues, to a case category named Accounting.



Field	Description
nt	manager of the <b>Responsible Department</b> listed on the Case Category Metadata record as the <b>Assigned To</b> user for the case.

#### 5. Click Save.

# Configuring the Quick Case Feature

Some of the elements which support the Quick Case feature can be configured by a Global Administrator.

## **Client Service Case Types**

On the Client Service Case Type form, review the following configuration:

- Specify the case types users can access from the Quick Case Type field list by setting the Expose
   Case Type to Quick Case flag on the Client Service Case Type form.
- Optionally, set the **Require Employee** flag on the Client Service Case Type form of each case type where you want to make the **Employee** field required for data entry.

For details on updating Client Service Case Type records, see Configuring Case Types.

## Client Service Case Category Metadata

On the Client Service Case Category Metadata form, optionally add a **Short Name** for each case type category on the Client Service Case Metadata form. This allows users to filter the Quick Case **Type** field lookup list by case type category **Short Name** during data entry.

For details on updating Client Service Case Category Metadata, see Configuring Case Category Metadata.

## **Quick Case Window Access Permissions**

Add Quick Case window access permissions. Access permissions to the Quick Case dialog are controlled by a new security entity: **biz\_ClientServiceCase\_QuickCase**. Add the entity to desired roles and configure the entity to match role requirements.

For more details on updating role security, see Administering role security.

#### **Related Topics:**

Adding a Quick Case

# 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 <i>n</i> days/weeks/months/years, create this task.	
Start Date Offset	Start <i>n</i> days/weeks/months/years.	
Due Date Offset	Due <i>n</i> days after the first day of the month/week/month/year.	
Recurrence Configuration	<ul> <li>Options vary depending on what you selected for Interval.</li> <li>Daily: Weekdays Only means that the task is only created during the week.</li> <li>Weekly: Select the day or days of the week.</li> <li>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).</li> </ul>	
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

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.



Video

View the video Configuring Recurring Tasks.

# Chapter 10

# 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.

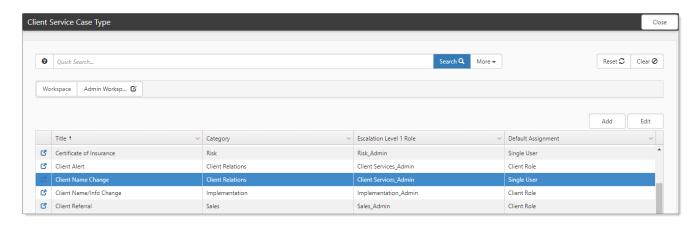
# **Configuring Case Types**

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.

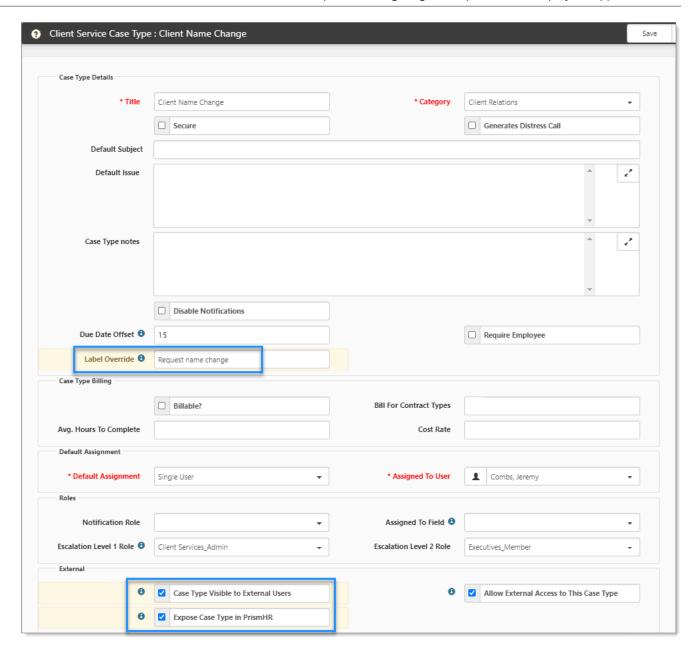
#### To configure:

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. 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. (See the table below for field definitions.)



### 3. Complete the form.

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.

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 <b>not</b> 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 <b>Expose Case Type in PrismHR</b> . If blank, the title of the case type is displayed.
Default Assignment	<b>Note:</b> The fields in the Default Assignment fieldset change depending on the selection in the <b>Default Assignment</b> field.
	When you assign a case, you can specify the <b>Default Assignment</b> as Creator, Single User, or Client Role.
	• <b>Creator</b> : Defaults the <b>Assigned To</b> user on the case to the person that creates the case.
	<ul> <li>Single User: Defaults to the user selected in the Assigned To User field.</li> </ul>
	<ul> <li>The Assigned To User field displays as a required field once Single User is selected.</li> </ul>
	<ul> <li>Selecting Single User also causes the required field, <b>Backup Assignment</b>, to display. You can select an assignment type of Single User or Client Role.</li> </ul>
	<ul> <li>Once the Backup Assignment is set, the Backup Assigned To field displays. It is also a required field. This is where you select the backup user or role based on the backup assignment type selected.</li> </ul>
	<ul> <li>Client Role: Defaults to the user determined by the Client Team role selected in the Assigned To Field.</li> <li>The Assigned To Field displays as a required</li> </ul>

- field once Client Role is selected.
- Selecting Client Role also causes the required field, **Backup Assignment**, to display.) You can select an assignment type of Single User or Client Role.
- Once the Backup Assignment is set, the
  Backup Assigned To field displays. It is also a
  required field. This is where you select the
  backup user or role based on the backup
  assignment type selected.

**Backup Assignment** ensures that if the selected Single User or Client Role is not valid (i.e., is blank, Inactive, or Expired), the case type defaults to a meaningful value using the following validation order:

- Validation Step 1: If the Default Assignment on the Case Type Assignment record is Single User and that user is valid, the Assigned To user on the case displays the default assigned single user.
- Validation Step 2: If the Default Assignment on the Case Type Assignment is Single User and that user becomes invalid, the Assigned To user on the case displays the user or role from Backup Assigned To field.
- Validation Step 3: If the Backup Assigned To field user or role is invalid, the Assigned To user on the case displays the Manager of the responsible department from the Case Type category metadata associated with the case type. For example, if the Category field on the Case Type record for 401K is "Benefits", the system will check the Department Admin/Department Details record for "Benefits" and display the name shown in the Manager field as the Assigned To user on the case.
- Validation Step 4: If no valid default assignments
  can be found, the Assigned To field will be left blank,
  and the following error message displays when you
  click Apply or Save on the case: "There is no

	Assigned To selected and the associated case type does not have a default user selected. Please either set a default user on the case type or select an Assigned To user. "
Case Type Position Tags	Case Type Position Tags allow you to choose which case types are visible to portal users by their PrismHR User Type. Both the Manager and Employee tags are set by default. To display a Case Type to only one group, remove one of the default tags from the Case Type Position Tags field as applicable on each Case Type record.

### 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: Basic Configuration.
- 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.

# Learning How: Creating Cases in the Employee Portal Support Center

This video walks you through how to create a case in the Employee Portal Support Center.



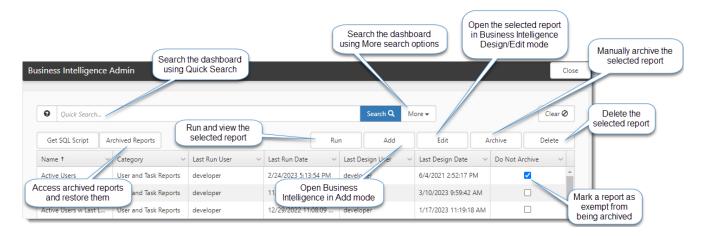
Video

Watch the video Creating Cases in the Employee Portal Support Center.

# Chapter 11

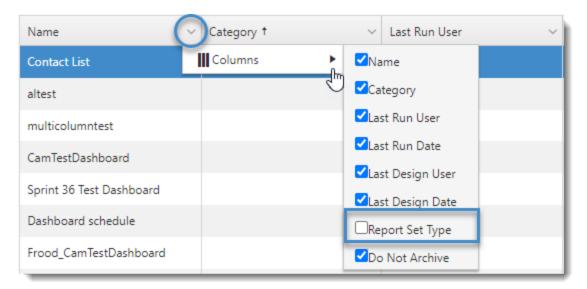
# **Business Intelligence Admin Dashboard**

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, Attribute Type and Value.
- 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.
 The report opens in Business Intelligence, in View mode.

### To edit reports:

Select the report and click Edit.
 The report opens in Business Intelligence, in Design/Edit mode.

### To delete reports:

- Select the report to delete and click **Delete**.
   The **Delete Report** confirmation window displays.
- Click **Yes** to delete the report.

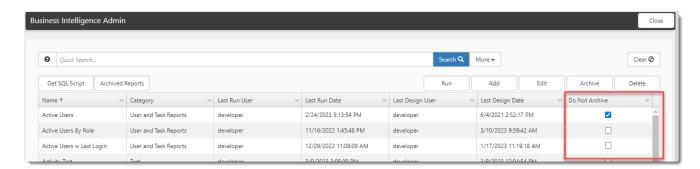
**Note:** Global Admin users cannot delete the following:

- Reports with the PHR\_SystemAdmin Role (secured for PrismHR)
- Reports that are configured as datasource reports
- Reports that are used in a BI widget
- Reports that are used in a Dashboard

If a Global Admin user attempts to delete a report that meets at least one of the abovementioned criteria, a message displays to the user and they are prohibited from proceeding.

### To mark a report "Do Not Archive":

• Click the checkbox in the **Do Not Archive** column next to the reports you want to exclude from being archived.



The report becomes exempt from being archived by the scheduled process **Auto Archive BI Reports** effective immediately. The report is also exempt from being archived when the **Archive** button is used to manually archive a report.

### To manually archive a report:

- Select the report to delete and click **Archive**.
   The **Archive Report** confirmation window displays.
- Click **Yes** to archive the report.

**Note:** Global Admin users cannot archive the following:

- Reports with the PHR\_SystemAdmin Role (secured for PrismHR)
- Reports that are configured as datasource reports
- Reports that are used in a BI widget
- Reports that are used in a Dashboard

If a Global Admin user attempts to archive a report that meets at least one of the abovementioned criteria, a message displays to the user and they are prohibited from proceeding.

### To restore an archived report:

Click Archived Reports.

The Business Intelligence Admin (Archived) dashboard displays.

- Use More search to search by Name, Category, Report Type, XML, Last Run Use, and Last Design Date, and Archived Date
- Select the report to restore and then click **Restore**.

The report is added to the Business Intelligence Admin dashboard.

### To delete an archived report:

• Click Archived Reports.

The Business Intelligence Admin (Archived) dashboard displays.

 Use More search to search by Name, Category, Report Type, XML, Last Run Use, and Last Design Date, and Archived Date

- Select the report to delete and then click **Delete**.
   The Delete Report confirmation window displays.
- Click **Yes** to delete the archived report.

Note: Only Global Admin users can delete archived reports.

### **Related Topics:**

• Configuring the Auto Archive BI Reports Scheduled Process

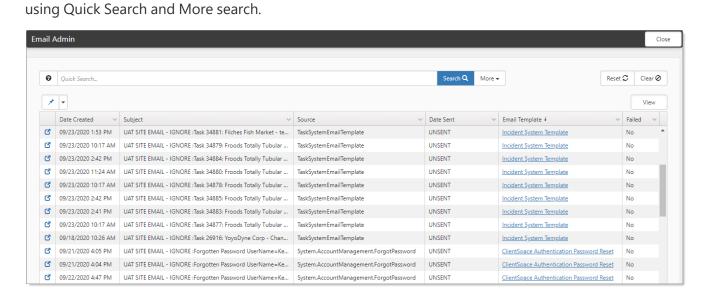
# Chapter 12

# **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.

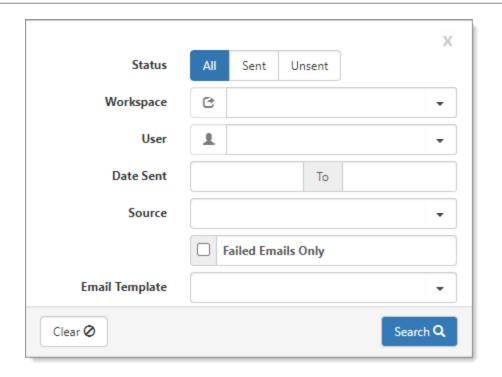
### To access Email Admin:

Go to System Admin > Email Admin.
 The Email Admin dashboard opens with a list of entries. You can view entries and search them



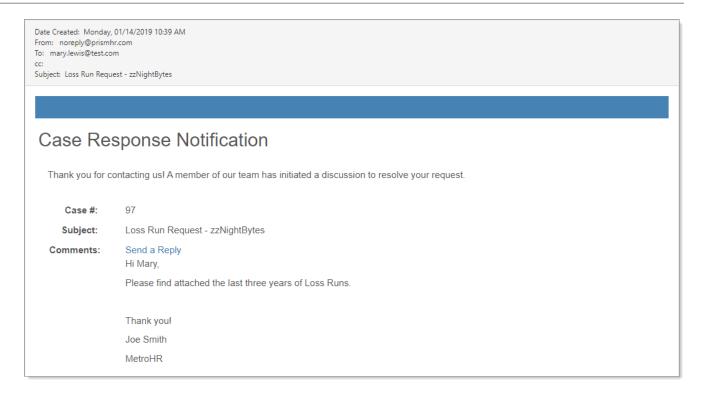
2. To search using More search, click **More**.

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.



- 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 13

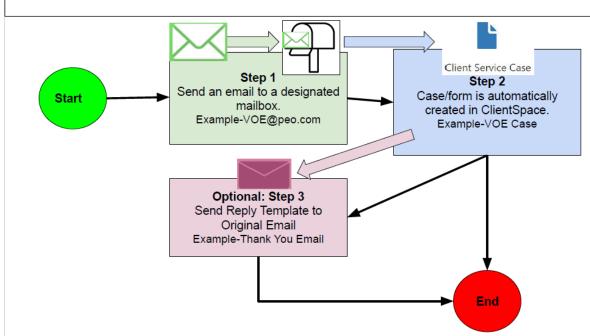
# **Email Integration**

Email Integration allows your company to automatically create a case based on an email being sent to a designated mailbox. 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.

### Workflow Overview

# Email Integration Workflow Integration allows your company to automatically

**What is Email Integration?** Email Integration allows your company to automatically create a case or form based on an email being sent to a designated mailbox.



### How does this work behind-the-scenes?

A background scheduled process called Process Email Integration runs approximately every minute. This process checks **System Admin** > **Email Integration** for configured Email Integrations. If configured Email Integrations exist, the system locates the specified mailbox of each integration and searches each mailbox for unread emails.

• If unread emails exist: The Process Email Integration scheduled process uses the content of the emails to create the Cases or Forms specified in the Email Integration configuration details. After creating the Cases/Forms, the Process Email Integration scheduled process then flags the emails as "Read" to prevent duplicate Cases or Forms from being created.

**Note:** If any errors occur during processing, they are logged in **System Admin > Exception Log**.

• If no unread emails exist: The Process Email Integration scheduled process does nothing.

# **Configuration Prerequisites**

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.

**ALERT:** Multi-factor authentication (MFA) must be disabled on the Email Integration account.

- 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/Office 365

**Note:** Before you configure for Outlook.com/Office 365, see Configuring distribution groups for Email Integration with Office 365.

- Hotmail.com
- Yahoo.com

# **Next Steps**

The following topics guide you through the Email Integration configuration steps.

# Overview of Configuring Email Integration

Email Integration allows your company to automatically create a case based on an email being sent to a designated mailbox.

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.
  - Multi-factor authentication (MFA) must be disabled on the Email Integration account.
- 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.
- 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.

### **Learning How: Email Integration Demo**

This video is a brief demo of how Email Integration works in ClientSpace to automatically create cases from emails and send notifications of case creation.



### Video

View the video Email Integration Demo.

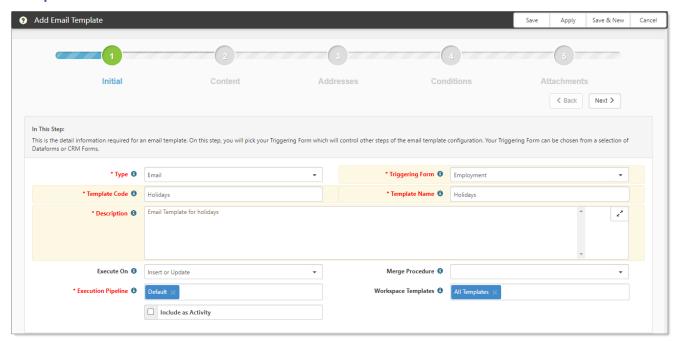
# Configuring the Email Integration Reply Template

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:**

- Go to System Admin → > Email Templates.
   The Email Templates dashboard opens.
- 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.

Туре	For <b>Email</b> notifications:  • Select <b>Email</b> . Default value.
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 <sup>1</sup> .  To add a dataform that is not in the list:
	<ol> <li>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.     </li> <li>In Table Name, select a dataform from the list.</li> <li>Click Ok.</li> </ol>
	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 ( <b>Insert</b> ), only when the form is changed ( <b>Update</b> ), or every time ( <b>Insert or Update</b> )? 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

<sup>&</sup>lt;sup>1</sup>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.

	emailtemplate_merge_proc.  Merge Procedure <sup>1</sup> also determines the fields that are available to use in field replacement.
Execution Pipeline	Email templates can support multiple pipelines <sup>2</sup> 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.
	<b>Note:</b> If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new email template, pipelines assigned a behavior of Default will auto-fill the <b>Execution Pipeline</b> field. If you are editing an existing email template, <b>Execution Pipeline</b> entries remain intact until edited. Changed entries are validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the <b>Execution Pipeline</b> list. If the same pipeline is assigned a behavior of Disallow, you will not be able to add it again.  See Configuring Pipeline Linking.
Workspace Templates	Select the Workspace Templates <sup>3</sup> 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. By default, the option is cleared, meaning do not include the email as an activity. If you select this option and the email template includes an attachment, the system uploads any attachments to the activity when it is created

### 2. Click Next.

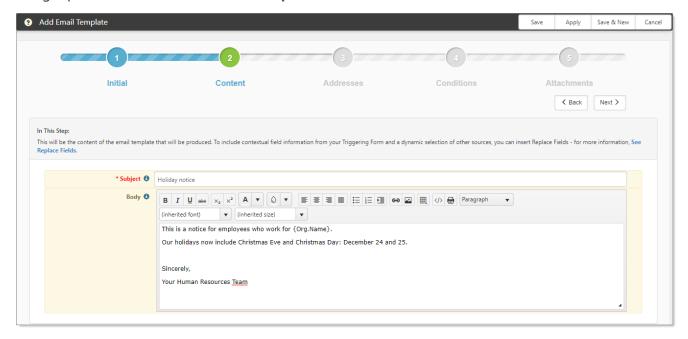
<sup>&</sup>lt;sup>1</sup>A Merge Procedure is a piece of prepared SQL code that can be reused over and over again.

<sup>&</sup>lt;sup>2</sup>A pipleline determines which rules are applied when the data is saved.

<sup>&</sup>lt;sup>3</sup>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.
- 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.
- 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.

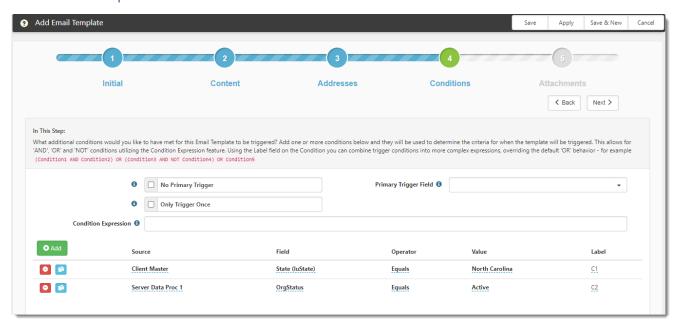
### Step 3: Addresses

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 <b>Primary Trigger Field</b> is disabled.
Only Trigger Once	When selected, the email template is triggered only once when the conditions are first met. Do not select this option if you want the email template to trigger each time the conditions are met.
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 <b>Add</b> area. Condition entries are identified with a <b>Label</b> (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.

### 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	The <b>Source</b> list includes the triggering form and its tabs, the channel trigger (i.e., the original form that started the channel), all triggerable, active singleforms, and the tabs of those single-forms. Applicable server data procs, if configured, may also be included.  When you select <b>Task</b> as the Triggering Form in Step 1 Initial, in this step Source sets to Task.	
Field	<ul> <li>Select the dataform or Stored Procedure field to compare to the trigger value.</li> <li>A few notes: <ul> <li>Email Template triggering provides multi-lookup fields (Multi Lookup (MultiLookup)) as triggering conditions.</li> <li>Field supports parent form fields. <ul> <li>Available operators are Empty, Not Empty, and Is Dirty.</li> </ul> </li> </ul></li></ul>	Comments  Assigned To Body Category Comments Due Date Source fkCompletedByUserID IsMarkedForDeletion Owner Priority Send Notification Stage Start Date Source Status Subject Type

**Note:** If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

• Field supports the **Active** dataform setting. Available operators are Does Not Equal, Equals, and Is Dirty (if choosing the triggering form as the **Source**). **Value** options are Unchecked and Checked.

**Note:** If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

- 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.
- 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.

### Note:

- Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
- If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

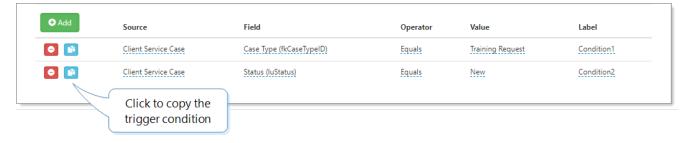
### Value

The criteria against which the trigger field is compared. For a condition that is

	typeahead <sup>1</sup> 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. ClientSpace assigns a label to a new condition with the naming convention C#. For example, C1 for the first condition that you create, C2 for the second, and so on. You can change the label name by selecting the name of the label and typing a new name for the label. For example, you can select the C1 label and enter Condition1 as the new label name.  Tip: Make this label short and representative of the Trigger Field. Labels are
	used in the Condition Expression field.
Condition Expression	Allows for <b>AND</b> , <b>OR</b> , and <b>NOT</b> 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.



<sup>&</sup>lt;sup>1</sup>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 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.

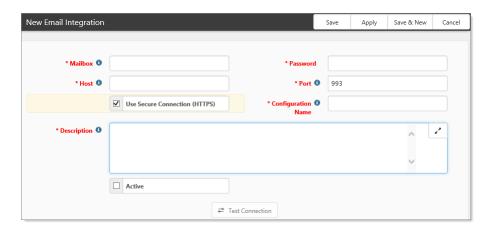
**ALERT:** Multi-factor authentication (MFA) must be disabled on the Email Integration account.

### Add a credential

### To add a credential:

- 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	Connect to the mail provider over the internet via unsecured (HTTP) or

(HTTPS)	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:

- 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.

### Learning How: Setting Up Advanced Email Integration Security

This video details how to set up advanced email integration security.



Video

View the video Setting Up Advanced Email Integration Security.

# **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.

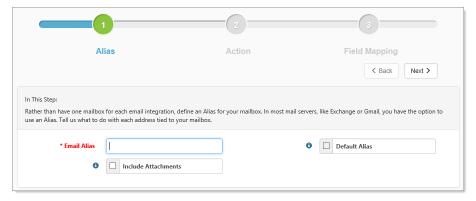
Review the topic Email Integration Processing for a comprehensive picture of the process.

### 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:

- 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

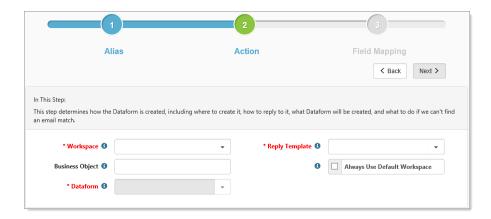
	• Email Alias 1: client+clientservicecase@gmail.com • Email Alias 2: client+createemployee@gmail.com In this example, you would create 3 email aliases, the first using the Email Account as the email Alias value. This creates the default email alias to be used. The second would be created using email 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. This field indicates the reply template that the system uses to send the process complete notification reply.  If no email reply is necessary, select <b>No Reply</b> . The system does not reply to the sender after completing the actions for the email integration. If an email reply is necessary, 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 <b>Case to Email Reply</b> .
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.

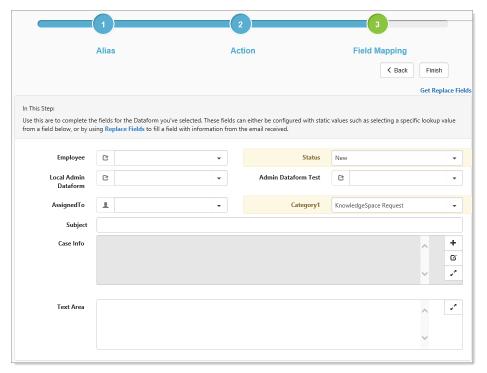
Dataform	Required. Contains the project type associated with this email alias. This determines what type of dataform to create. Select the Project Type from the list.
	For case discussions, select Case Discussion Message.

### 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.

- 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.
{EmailBodyHTML}	The entire email body plus embedded images and any html formatting.
{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.

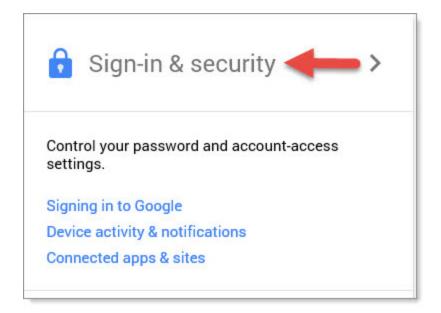
Gmail does not offer traditional aliases, but you can receive messages sent to your.username+any.alias@gmail.com. For example, messages sent to jane.doe+payroll@gmail.com are delivered to jane.doe@gmail.com.

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.

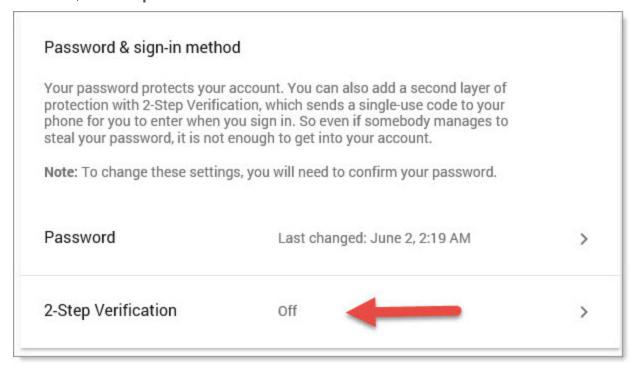
In ClientSpace, you can then use this aliased email address to create custom API Configurations, Email Integrations, and Email Templates that can then be used to either create a specific type of Client Service case, generate the case in a specific workspace or both, as well as send customized responses 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

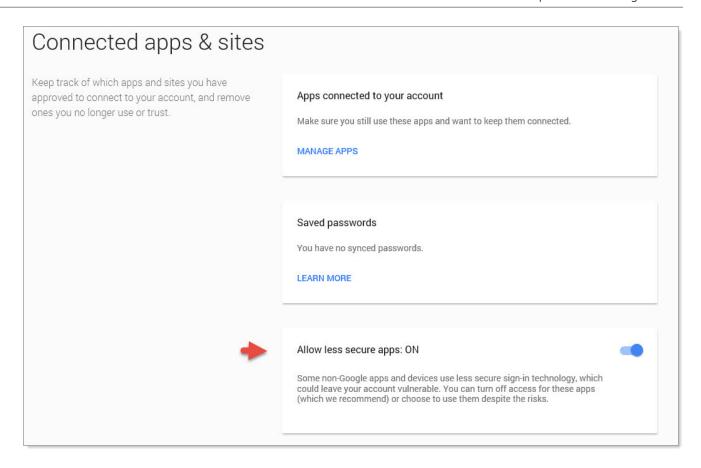
1. Open the Gmail account and go to My Account.



- 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 <b>Always use Default Workspace</b> 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.
	<ul> <li>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++++.</li> </ul>
	Note: In multi-tenant environments, the CLID includes both the Client Number and the PEO ID from the Client Master record of a workspace when the Use Multi-tenancy flag is set in
	PEO Configuration. In multi-tenant environments, the <b>Client Number</b> may not be unique across Prism database instances. Therefore, including the <b>PEO ID</b> in the <b>CLID</b> ensures proper workspace identification.
	For example, a <b>CLID</b> of 165::000110 signifies the <b>Client Number</b> is 000110 and the <b>PEO ID</b> is 165.
	Also see Multi-tenant Environments in ClientSpace.
	<ul> <li>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.</li> </ul>
	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.
	<ul> <li>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 and the Client Contact information on the newly created Client Service case is updated using the "From" email address from the matching contact record.</li> </ul>
	If the contact is not found, the Organization table is searched for an

Action	Description
	<ul> <li>organization with the same email domain. If found, the default workspace for this organization is used.</li> <li>If no workspace is found, the default workspace from the alias is used along with the project type to create the appropriate data form.</li> </ul>
Body scanned	<ul> <li>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.</li> <li>Any invalid special characters found in the email subject and body are scrubbed. This process does not log an error message.</li> </ul>
Business object	<ul> <li>If a business object is specified, the EmailIntegrationCreateNewForm is called to allow the business layer to set data values before creating the form.</li> <li>If the Business Object does not cancel the save, then the dataform is saved.</li> </ul>
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 14

## **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/

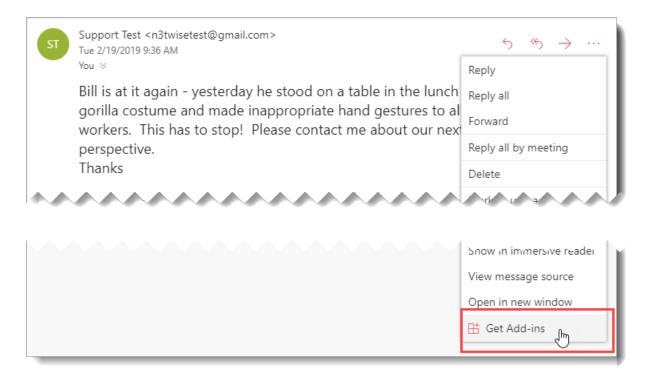
## Installing from outlook.live.com

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:

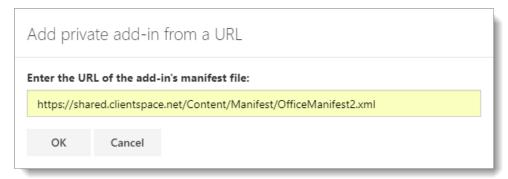
- 1. Sign in to your Outlook account.
- 2. Open an existing email.
- At the top of the email message, on the right side, click . . . (More actions).
   A list of options is displayed.



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:

- 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**.

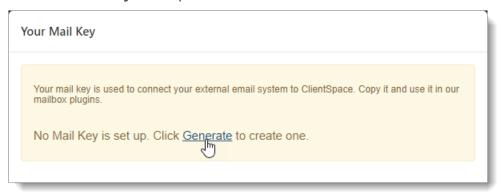
## Next: Obtain Mail Key from ClientSpace

#### To obtain the Mail Key:

 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.

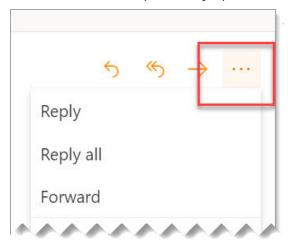
- 3. Click the key to copy it to your clipboard. The Clipboard opens showing the key.
- 4. Click Ok.
- 5. Click Close.

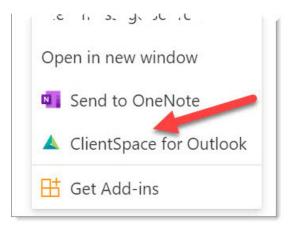
At this point, the key is copied to your clipboard and you are ready to paste the Mail Key in the Outlook configuration pane.

**Next: Back to Outlook** 

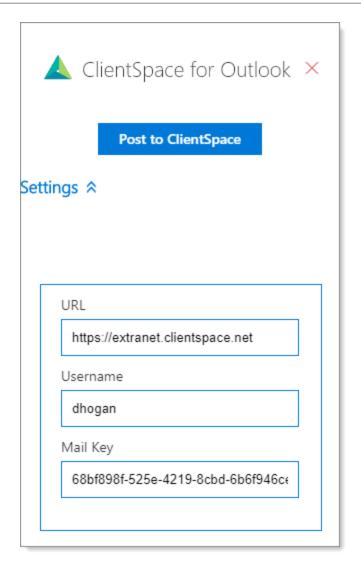
## To continue the configuration:

1. In Outlook, from the previously opened email, click . . . (More actions).





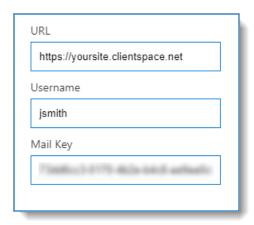
2. From the list of options, click **ClientSpace for Outlook.**The ClientSpace for Outlook pane opens beside the open email. You must open this pane for every Outlook email that you want to post to ClientSpace.



3. In the ClientSpace for Outlook pane, if you do not see fields for URL, Username, and Mail Key, click **Settings**.

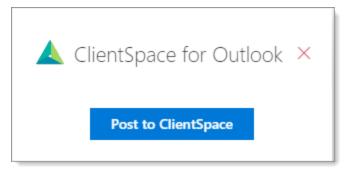
The fields are now displayed.

- 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.

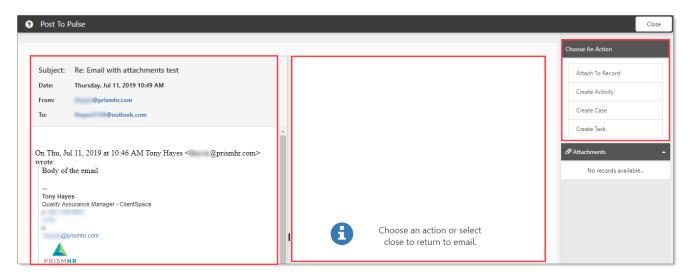
9. If pop-ups are blocked, click the Pop-up blocker and select **Always allow pop-ups and redirects from https://outlook.live.com**.

#### 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:

- 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:

- 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.
- 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

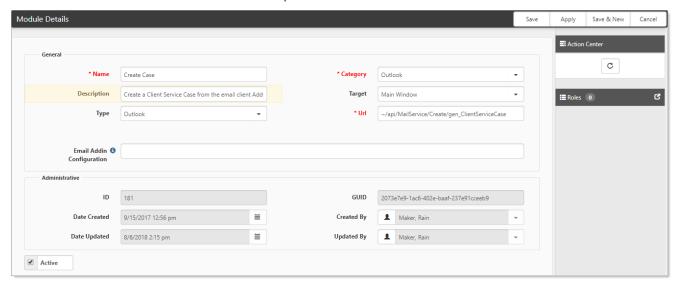
## Configuring the Outlook add-in module for Create

Through the Outlook add-in, you can create new cases, tasks and claim notes 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, Create Task and Create Claim Notes **modules** for the Outlook add-in.

The Outlook add-in uses a system module when creating a new case, task or claim note 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.

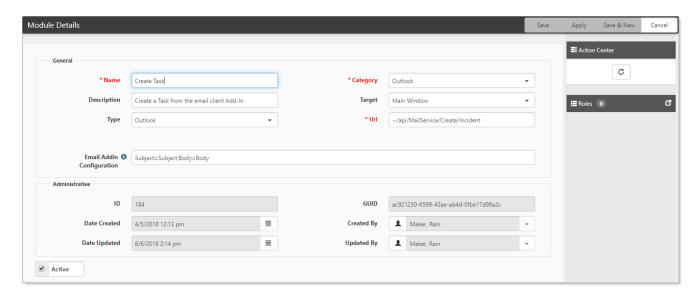
#### To configure the Outlook add-in modules:

- Go to System Admin > Modules.
   The Modules dashboard opens.
- In the Search box, filter the Modules list by typing Outlook.
   Modules that apply to Outlook are displayed. The three relevant modules are Create Case, Create Task, and Create Claim Notes.
- Open Create Case.
   The Module Details form for Create Case opens.



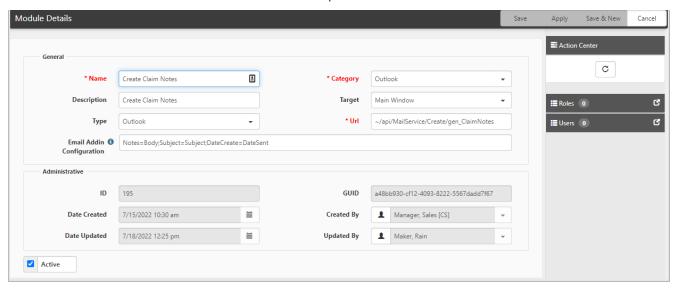
- 4. Complete the form (referring to the field definitions table near the end of this topic as needed) and click **Save**.
- 5. Open **Create Task**.

The Module Details form for Create Task opens.



- 6. Complete the form (referring to the field definitions table near the end of this topic as needed) and click **Save**.
- 7. Open **Create Claim Notes**.

The Module Details form for Create Claim Notes opens.



8. Complete the form (referring to the field definitions table below as needed) and click Save.

Name	Defaults to <b>Create Case</b> , <b>Create Task</b> or <b>Create Claim Notes</b> depending on your selection.
Category	Defaults to <b>Outlook</b> .

Description	<ul> <li>For Create Task, defaults to Create a Task from the email client Add-In.</li> <li>For Create Case, defaults to Create a Client Service Case from the email client Add-In.</li> <li>For Create Claim Notes, defaults to Create Claim Notes.</li> </ul>
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).
Туре	Defaults to <b>Outlook</b> .
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, task, or claims note using data from the selected email. Pair case, task or claim notes fields with email fields. Separate the pairings with a semi-colon, no spaces between them, and no ending semicolon.  Example format for a Task: Case/TaskField=EmailField  Example format for a  Case: Subject=Subject;CaseInfo=Body;EmailAddress=Sender;z_  ClientReportDate=DateSent  Example format for a Claim Note:  Notes=Body;Subject=Subject;DateCreate=DateSent  The second example above is for a case. The following information will be brought in:
	<ul> <li>Subject of the case is filled with the Subject line in the email.</li> <li>CaseInfo of the case is filled with the Body of the email.</li> <li>Email Address on the case is filled with the From address on the email.</li> <li>The custom Client Report Date field is filled with the DateSent of the email.</li> <li>Available fields retrieved from the email are:</li> </ul>
	<ul> <li>DateSent: mailboxItem.dateSent</li> <li>Subject: mailboxItem.subject</li> <li>Body: mailboxItem.body</li> <li>Sender: mailboxItem.from</li> </ul>

• Recipient: mailboxItem.to

#### **Additional Optional Parameters:**

Show EMBActivity: You can also add the ShowEMBActivity parameter
to this field (for cases and tasks only). The ShowEMBActivity parameter
exposes the Add Email as Activity check box when a user creates a
client service case, task, or claim note.

The following graphic illustrates the check box option that the system displays for a new case or task when using the **ShowEMBActivity** parameter.



HTMLBody: The HTMLBody formatting parameter can be added to any
Outlook Add-In module as long as it is mapped to an Editor field. When
the parameter is correctly mapped to an Editor field, HTML formatting in
the original Outlook email body text is applied to the imported email
body text in ClientSpace. To configure the option, enter
 NameOfEditorField>=HTMLBody as shown in the example image



below:

9. Click Save.

For Create Case, Create Task, or Create Claim Note functionality to appear in the add-in, the respective module must be active in **System Admin > Modules**.

#### To add custom Outlook modules:

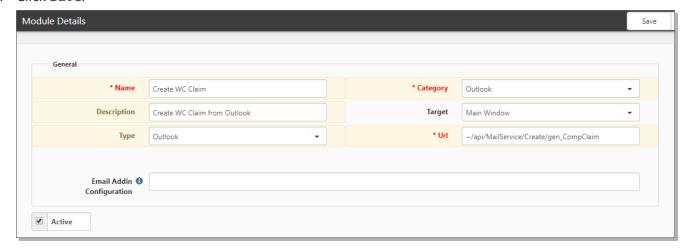
- Go to System Admin → > Modules.
   The Modules dashboard opens.
- 2. Click Add.

The Module Details form opens.

Name Enter a name that fits your new module. Example: Create WC Claim.

Category	Select <b>Outlook</b> .
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).
Туре	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.

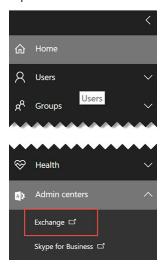
Per Microsoft, the Outlook add-in deployment requires:

- Office 365, Exchange Online, or Exchange Server 2013 or later
- Outlook 2013 or later

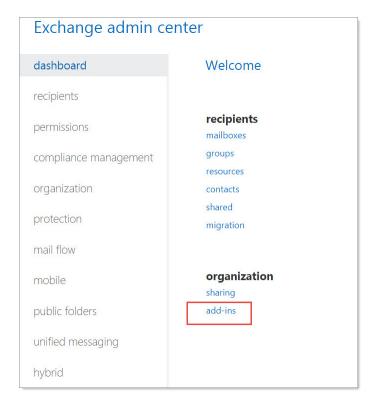
It is also highly recommended that you apply the latest service pack / patches for Exchange server to ensure you have Microsoft's latest deployment code. More details about this and the technology used for these add-ins can be found here: https://docs.microsoft.com/en-us/outlook/add-ins/

#### To publish the Outlook add-in through Exchange Admin:

1. Open the Office 365 Admin Center and navigate to **Admin Centers** > **Exchange**.

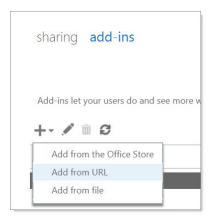


2. In the Exchange Admin Center Dashboard, under Organization, select add-ins.

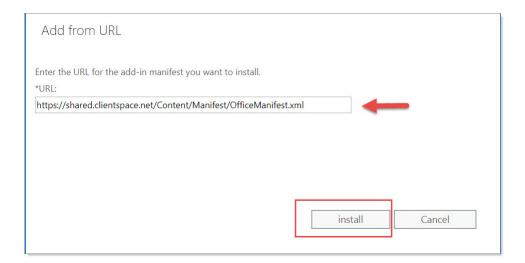


You are presented with a list of currently available add-ins.

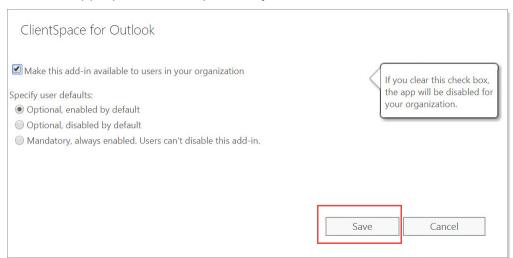
3. To add the new add-in to this list, click + and select Add from URL.



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.

•	<b>Mandatory</b> , <b>always enabled</b> : 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 15 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:

- 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.
  - Clone: Clone a selected widget layout.
- 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	
. tarrie	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:
	• <b>Workspace</b> : Adds the widget to the Workspace Landing page based on the assigned Weight and Conditions set.
	<ul> <li>Home: Creates a Home page that displays based on the assigned Weight and Conditions set.</li> </ul>
	• <b>Dataform</b> : 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:

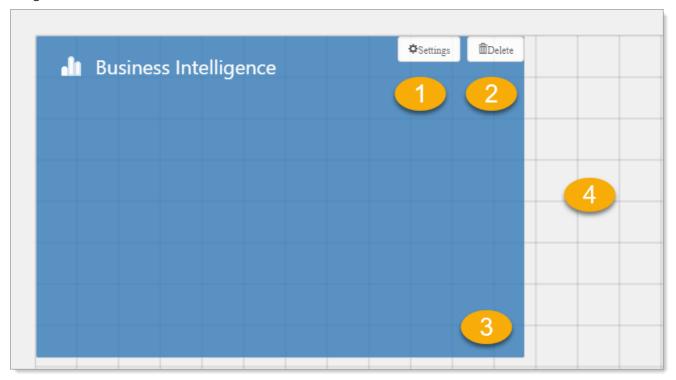
- From the Widget Layout Details form, click Add Widgets.
   The Widget Library is displayed showing the current list of widget types that are available, accompanied by a brief description of what the widgets display.
  - Search: While the widget library is currently small and easily manageable, we envision 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:

- 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.

## Cloning widget layouts

To save time setting up widget layouts, locate an existing widget layout that is similar to the layout you want to set up, clone it, modify it as necessary and then apply it to the desired home page, workspace landing page, or dataform header.

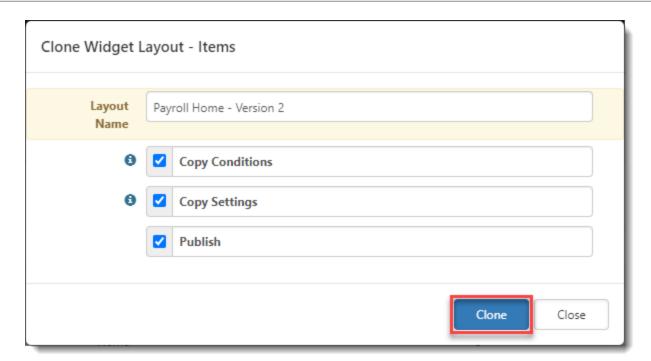
#### To clone a widget layout:

- 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.
  - Clone: Clone a selected widget layout.

- To clone a new widget layout, select the layout you want to clone by clicking it in the Widget Layouts dashboard and then click **Clone**.
   The Clone Widget Layout - Items form opens.
- 4. Complete the form:

Layout Name	Enter the name of your new layout. It should be descriptive of layout type and audience, for example, <i>Payroll Home</i> .
	<b>Note:</b> If you do not enter a <b>Layout Name</b> , a system default name is created for the new widget layout using the following naming convention: Cloned From {Original Widget Layout Name}.
Copy Conditions	The <b>Copy Conditions</b> checkbox only displays if the original widget layout had display conditions configured. Check this setting to copy those display conditions to the new widget layout.
Copy Settings	The <b>Copy Settings</b> checkbox only displays if one or more widget(s) on the original layout supports configuration settings. Currently these include Bl, Image Display, Help Center, and Query Widgets . Check this setting to copy these configurable widgets from the original widget layout to the new widget layout.
	<b>Note:</b> If you do not clone the widgets listed above, ClientSpace will rearrange the layout by justifying the remaining widgets from the top of the new layout.
Publish	Check this option to publish the new widget layout upon creation. (If you do not want to publish the new layout now, leave it unchecked. You can click the <b>Published</b> checkbox next to the new layout in the Widget Layouts dashboard when you are ready to publish.)

See an example of the completed form below:



5. Click **Clone** to create and save the new widget layout. The new layout is also published if you checked the **Publish** option.

## **Related Topics:**

- Adding Widget Layouts
- Adding security and display conditions

## Adding security and display conditions

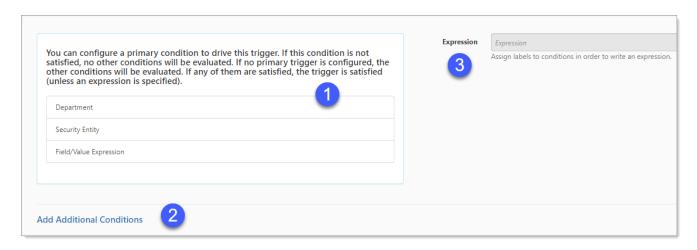
Adding conditions to your widget layout is essentially adding the trigger conditions that determine if the widget displays.

## **Primary condition**

This procedure continues from the previous steps, from an open Widget Layout Details form.

#### To set conditions:

- 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 <b>Label</b> 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 <b>OR</b> 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.

<b>Trigger Condition</b>	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

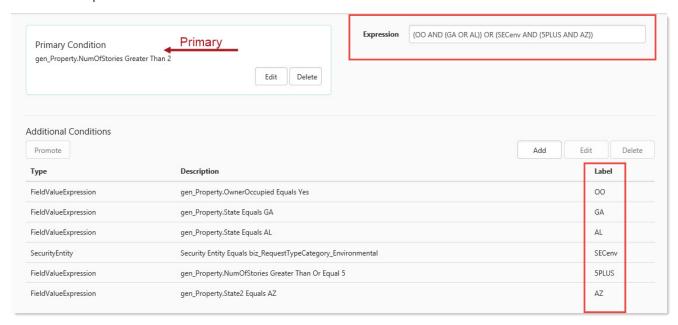
Commonly used in Workflow, Field Value Expressions are the most robust of the trigger conditions.

Field	Description
Туре	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: <b>Pricing State Source   State Field   Equals Operator   "FL"</b> 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:

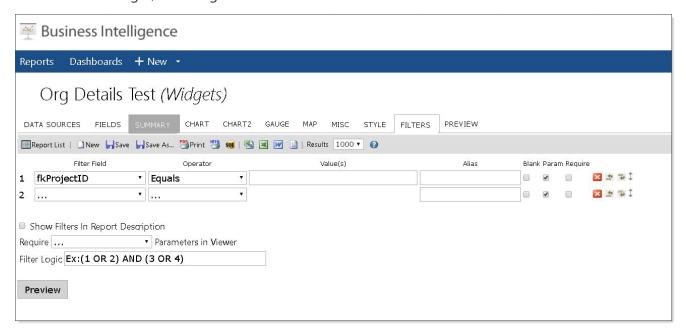
- The **Primary condition** is the **Number Of Stories** field, which must be greater than 2.
- If this primary condition is met, the system then analyzes the **Additional Conditions** using the Condition Expression. This condition expression is built using the **Expression** labels on the additional 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.

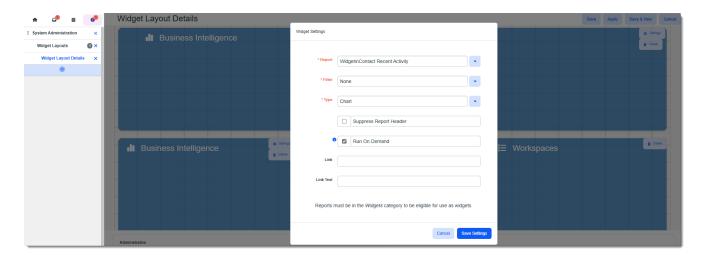


#### From a BI report:

- 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.

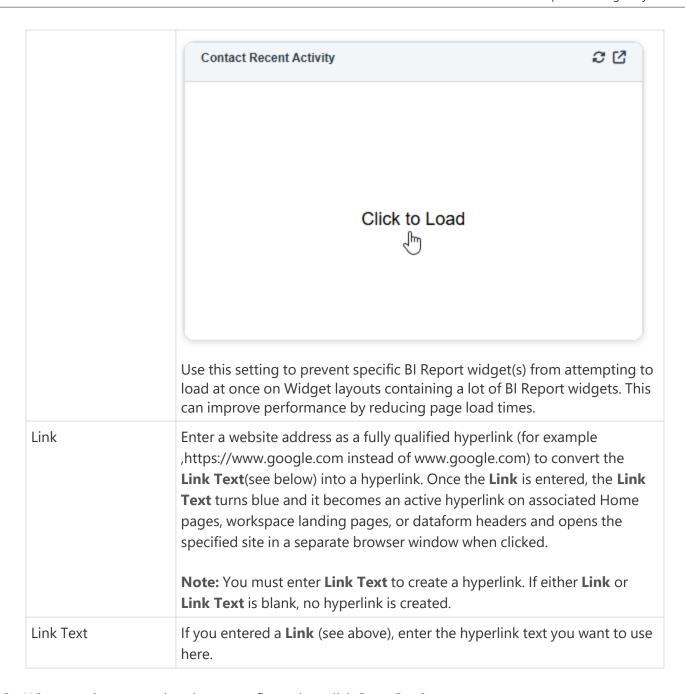
#### To configure a BI report widget:

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. <b>NOTE</b> : 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.
Туре	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).
Run On Demand	When this setting is applied to a BI report widget, it does not load automatically. It is triggered by a "Click to Load" link in the center of the widget frame.

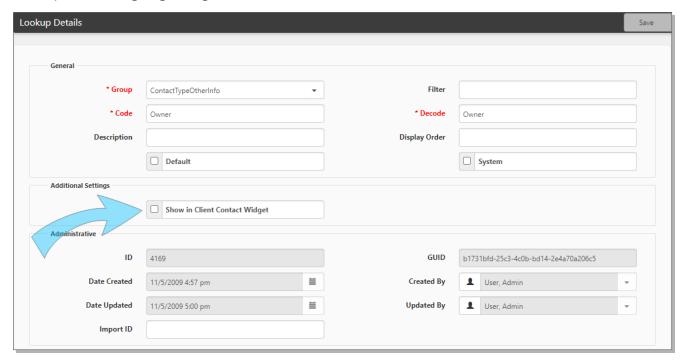


3. When you have completed your configuration, click **Save Settings**.

If you have any questions, please submit an Extranet service ticket to ClientSpace.

## Configuring the Client Contacts widget

Certain contacts appear in the Client Contacts 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.



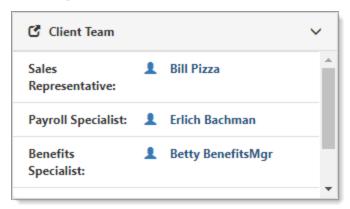
## To configure the Client Contacts widget:

- 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.

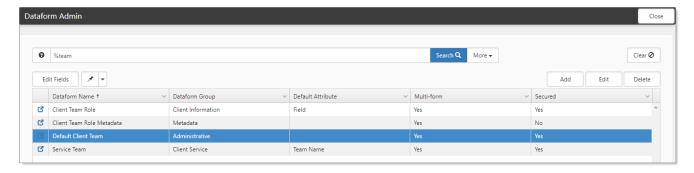
The header of the Client Team widget contains a header bar with a link to jump to the Client Team dataform as well as an expansion control that allows the panel to show more team members. Configuring the widget involves configuring the Client Team Role lookup value and associated metadata.



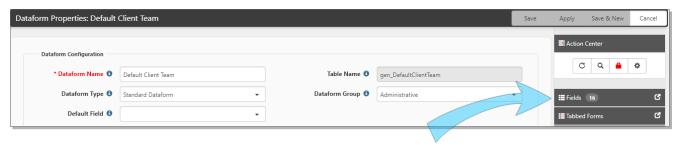
#### To configure the Client Team widget:

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**.

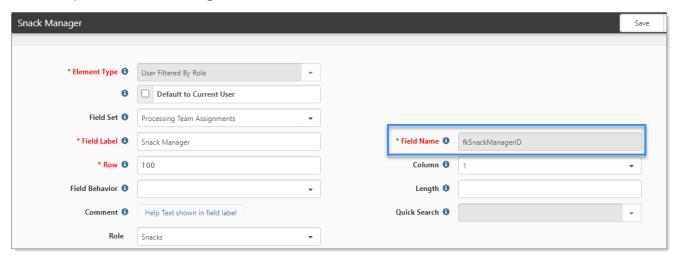


The list of fields displays.

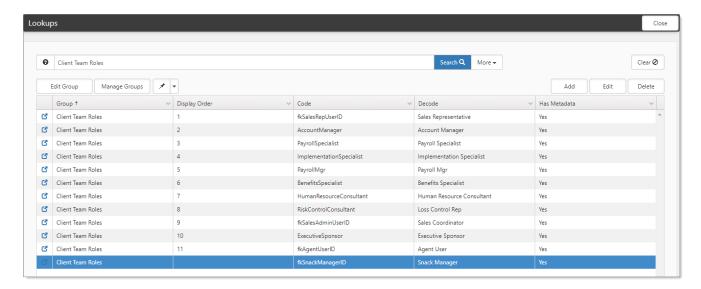
3. Select a field and click (Open).



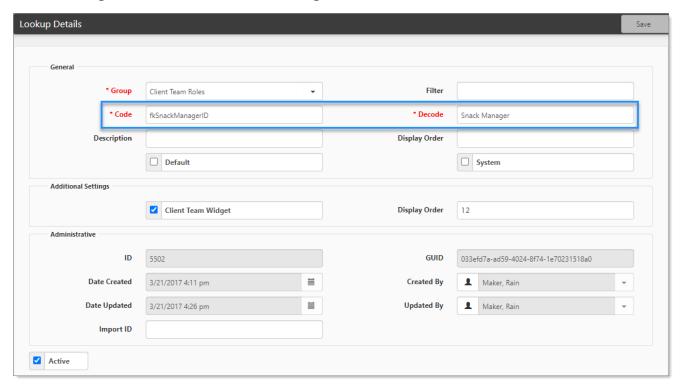
Our example uses Snack Manager.



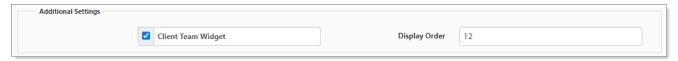
- 4. Copy the field name.
  - Our example shows the field as fkSnackManagerID.
- 5. Go to System Admin ❖ > Lookups.
  - The Lookups dashboard opens.
- 6. Filter the list to match your selection. Our example uses Client Team Roles, fkSnackManagerld.



- 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.

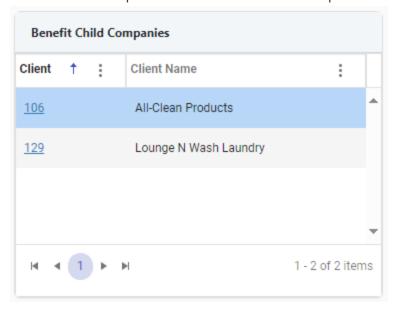
# Widget List

Review the topics for specific widgets to learn about widget functionality and configuration settings pertinent to the widget (if applicable).

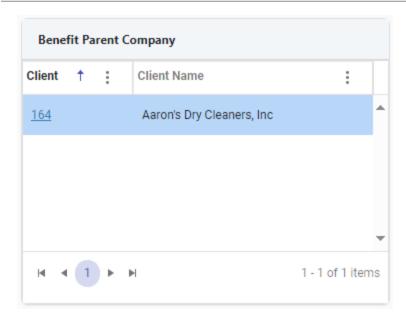
## Widget: Benefit Parent Company

The Benefit Parent Company widget displays the parent company or child company relationships on a Benefits Batch. The widget contains links to the related workspaces so that you can quickly reference a workspace while working on benefits offerings. This can help you maintain consistency in benefits across related companies.

When you view the widget from a parent company Benefits Batch, the header of the widget displays as Benefit Child Companies and all related child companies and associated workspace links are listed:



When you view the widget from a child company Benefits Batch, the header of the widget displays as Benefit Parent Company. The related parent company and link are listed:



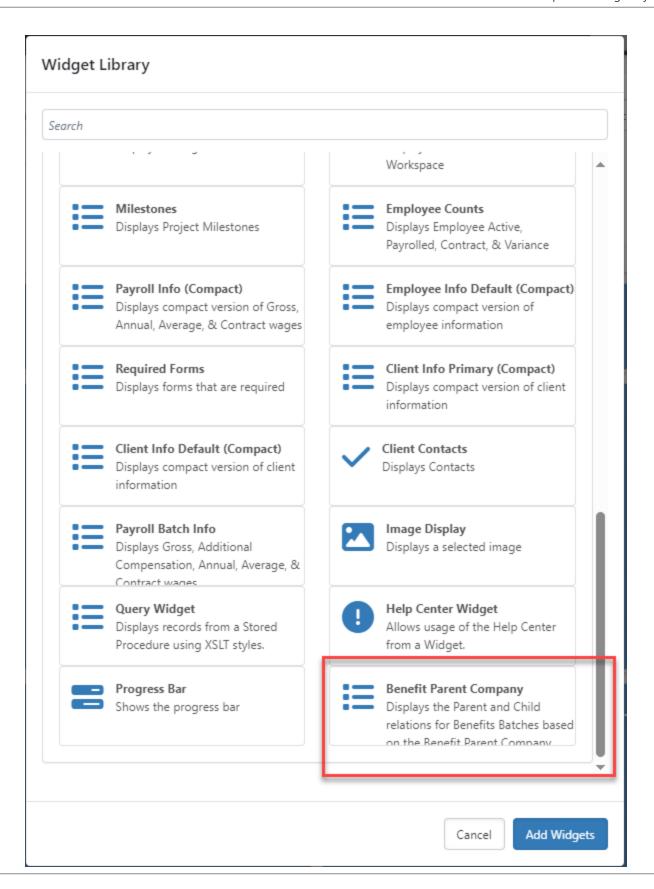
If a workspace has no parent/child company relationship, the Benefit Parent Company widget displays the following message:



### To configure the Progress Bar Widget:

- 1. Go to System Admin > Widget Layouts.
- 2. Click (Open) next to the Benefits Batch layout in the grid to edit the widget layout.

  Note: Typically, this widget is added to an existing Benefits Batch widget layout. If you are creating a new Benefits Batch layout, also see Adding Widget Layouts.
- 3. Set the **Target Type** as Benefits Batch.
- 4. On the Widget Layout Details window, click the **Add Widgets** button. The Widget Library window displays.
- 5. Click **Benefit Parent Company** and then click **Add Widgets** as shown in the example screen below:



The Widget Library window closes. The Benefit Parent Company Widget control displays on the Widget Layout Details screen.

- 6. Optionally, move or resize the widget frame:
  - **To resize the widget frame:** Drag the bottom right corner of the widget control to the desired dimensions.
  - To move the widget frame: Click anywhere in the blue area of the widget control area, hold down the
- 7. Click **Save** on Widget Layout Details.
- 8. You are returned to the Widget Layouts list. If your widget layout is new, it is displayed in the list as unpublished. (A new layout is displayed in italics and bold meaning it is unpublished.)
- 9. To publish a new widget layout, select the **Published** option in the far right column.
- 10. Test the widget on a Benefits Batch dataform.
  Note: If you make changes to the widget settings and return to an open dataform to test the changes, remember to click the ReloadC button in the Action Center to refresh the form with the latest changes.

## Widget: Employee Detail Info

The Employee Detail Info widget is on the Workers' Comp Claim and other Employee related forms. This widget provides insight into the details of the Employee / Employment records without the need to expand the record.



Widget Definition	
Employee Data	Employee name (EmployeeID) (Status).
Job Title	Current Employee Employment Job Title (Workers Comp Code). Click (Jump) to open the Employment record.

Widget Definition	
Employee Location	Current Employee Employment Location. Click (Jump) to open the Location record.
Last Hire Date	From the Employment Record.
Pay Frequency	From the Employment Record.
Last Payroll Date	Most recent Pay Date from Employee Voucher records. Click <b>☑</b> ( <b>Jump</b> ) to open the Employee Voucher record.

# Widget: Employee Info

The Employee Info widget is on the Workspace Landing Page when the Client Master Status is Client, Pending Termination, or Terminated. This widget provides insight into the variance of employee counts from the Pricing Batch in relation to actual payrolls produced. Employee numbers may appear skewed in specific scenarios where the client is seasonal or in cases where there are gaps in pay for employees.

Employee Info		
Active EE:	10	
Payroll EE (90 days):	0	
Contract EE:	35	
Variance:	-35	

Widget definition	
Active EE	Count of the Employee records in the workspace where the Employment Status = Active.
Payrolled EE (90 days)	Count of distinct Employee IDs for Payrolls in the last 90 days.
Contract EE	Sum of Employee Counts for each WC Code on the current activated Pricing Batch.
Variance	Difference between the Payroll EE and Contract EE.

# Widget: Employee Info

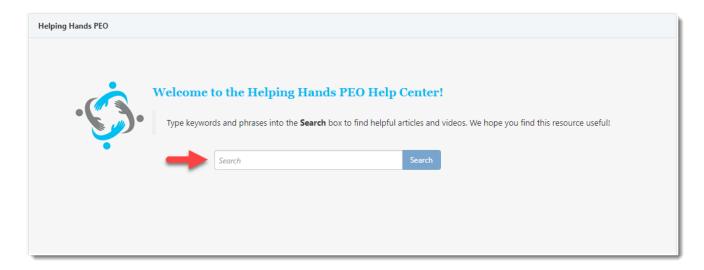
The Employee Info widget is on the Workspace Landing Page when the Client Master Status is Client, Pending Termination, or Terminated. This widget provides insight into the variance of employee counts from the Pricing Batch in relation to actual payrolls produced. Employee numbers may appear skewed in specific scenarios where the client is seasonal or in cases where there are gaps in pay for employees.



Widget definition	
Active EE	Count of the Employee records in the workspace where the Employment Status = Active.
Payrolled EE (90 days)	Count of distinct Employee IDs for Payrolls in the last 90 days.
Contract EE	Sum of Employee Counts for each WC Code on the current activated Pricing Batch.
Variance	Difference between the Payroll EE and Contract EE.

# Widget: Help Center

The Help Center Widget allows you to make your organization's external online documentation, such as a Help Center, Knowledge Base or Wiki, searchable from the ClientSpace Home page. Your documentation system remains its own external Help project. ClientSpace queries the system from within a widget frame. The widget frame is a customizable Search page with a built-in **Search** field as shown in the example below:



Users can enter keywords and phrases in the **Search** field and then click the **Search** button (or press the **Enter** key on the keyboard) to initiate a search of the documentation system. Search results display in new browser tab.

#### Note:

- Configuration by a global administrator is required.
- Your global administrator can optionally customize the background color of the widget Search
  page to make it match your organization's branding colors, add a logo, adjust text font sizes, etc.
  The example image shown above reflects several customizations including the addition of an
  image, adjustments to font colors, font sizes and the background color. If no customizations are
  made, the default settings are a white background with black text.
- Your organization can display unlimited Help Center widgets, each pointing to a different Help system.

### Configuration

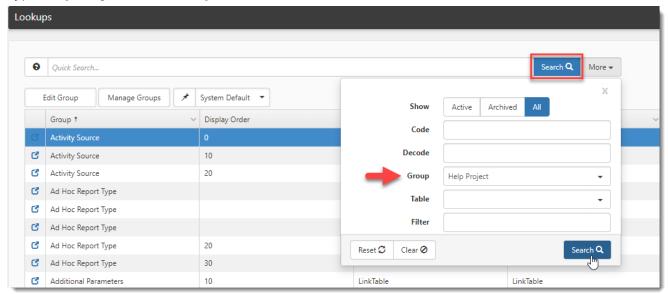
#### Step 1: Add a Lookup Value to the Help Project Lookup Group

A Lookup Group named **Help Project** has been created in **System Admin** > **Lookups** > **Manage Groups**). This is set up the URL record that ClientSpace will use to point to the Help system. You will select this lookup value from the Widget settings later in the configuration.

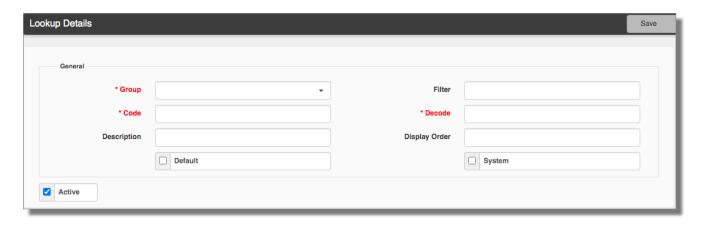
**Note:** You can add unlimited lookup values to the Help Project lookup group. This allows you to set up multiple Help Center widgets if desired, with each widget pointing to a different Help system.

### To add a lookup value to the Help Project lookup group:

- 2. The Lookups dashboard opens.
- 3. **Optional:** Locate the **Help Project** lookup group and review existing codes. **Note:** This step is not required for initial setup but is recommended as you continue to maintain the lookup group and add values to it over time. Doing this ensures you are not attempting to add duplicate values.
  - a. Click More.
  - b. Next to **Show**, click **All**. **Note:** Doing this shows any archived values that may be hidden in the list.
  - c. Type **Help Project** in the **Group** field and then click **Search**.



- e. Open the existing lookup records and review the **Code** and **Decode** values to ensure you are not attempting to add duplicate values and then close the records.
- 4. Click **Add** on the Lookups dashboard. The Lookup Details form opens.



## 5. Complete the form:

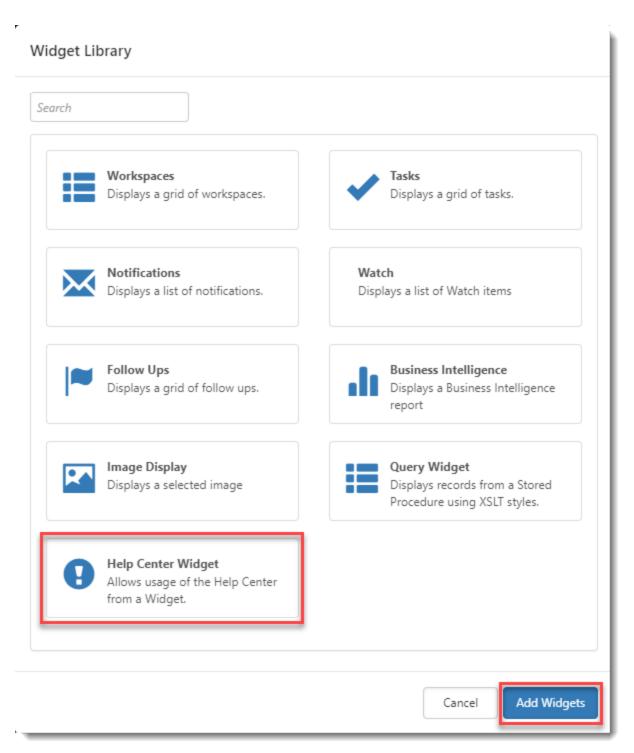
**Note:** Any fields not listed below are either optional or not applicable for this configuration.

Group	Select the <b>Help Project</b> group.
Code	Enter the URL of the Help system.
	<b>Example:</b> https://extranet.clientspace.net/Helpdoc/search.htm
	<b>Tip:</b> If the Help system has a search results page, set the URL to point to it (as shown in the example above) instead of pointing to the default page, such as a <b>Home</b> landing page, that launches when you first open the system. Then, when a user enters a search, the default page is bypassed and they are taken directly to the search results. If you do not do this, the widget will still function but may briefly display the default page before rerouting to display the search results page.
Decode	The <b>Decode</b> value displays in the <b>Project</b> drop down field in the Help Center widget settings when configuring the Help Center widget. <b>Example:</b> ClientSpace Help
Active	Leave the <b>Active</b> checkbox selected if you want the lookup <b>Decode</b> value to be available for selection when configuring the Help Center widget.

### 6. Click Save.

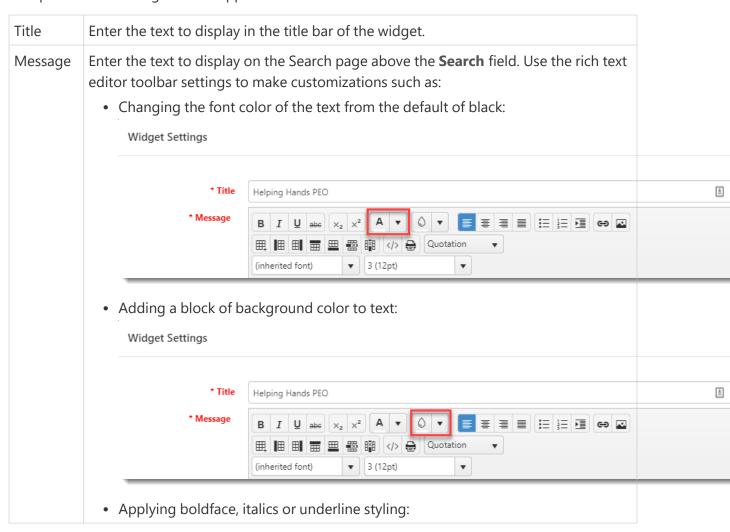
## **Step 2: Configure Widget Settings**

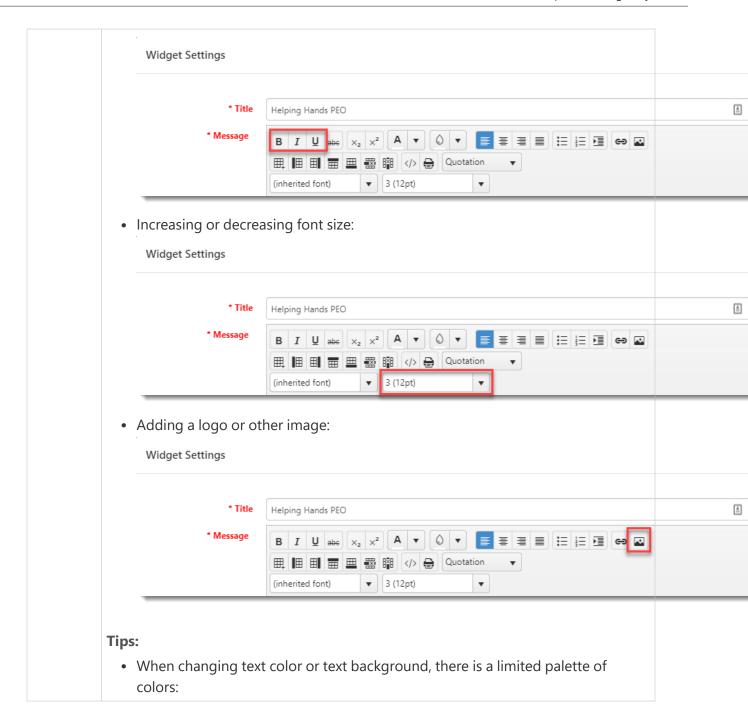
- 1. Go to **System Admin** → **Widget Layouts**.
- 2. Click **Add Widgets** to add a new widget layout or click (Open) next to an existing layout in the grid to edit the widget layout.
- 3. On the Widget Layout Details window, click the **Add Widgets** button. The Widget Library window displays.
- 4. Click **Help Center Widget** and then click **Add Widgets** as shown in the example below:

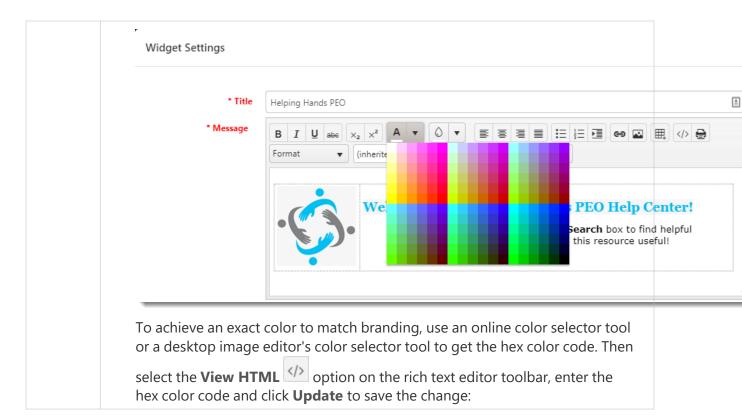


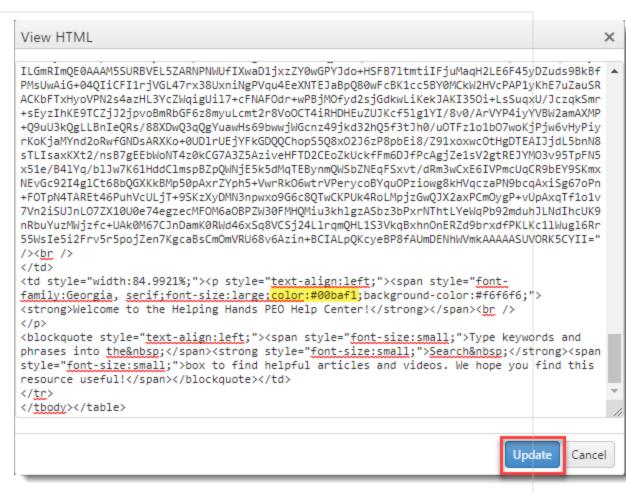
The Widget Library window closes. A Help Center widget control displays on the Widget Layout Details screen.

- 5. Drag the bottom right corner of the widget control to dimensions that will properly display the Help Center widget **Search** page. (Once you finish configuring the widget and test how the widget renders in the target location, you may need to adjust dimensions.)
- 6. Click the **Settings** button on the Help Center widget control. The Widget Settings window displays.
- 7. Complete the following fields as applicable.



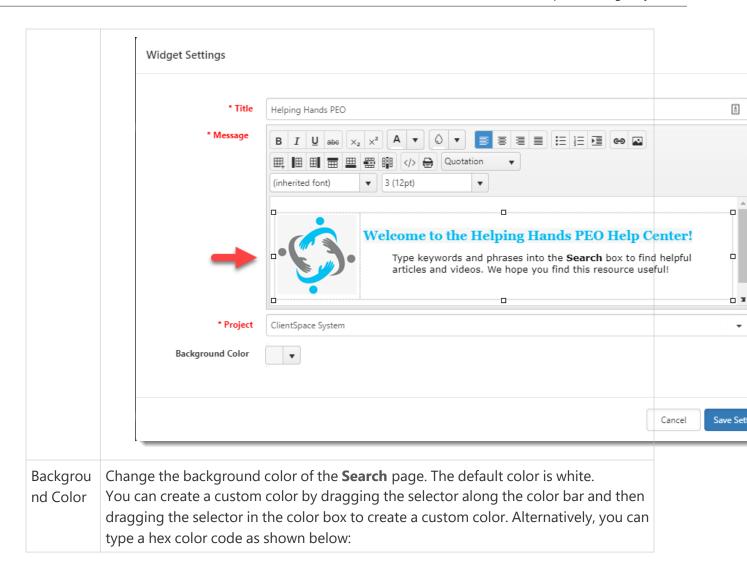


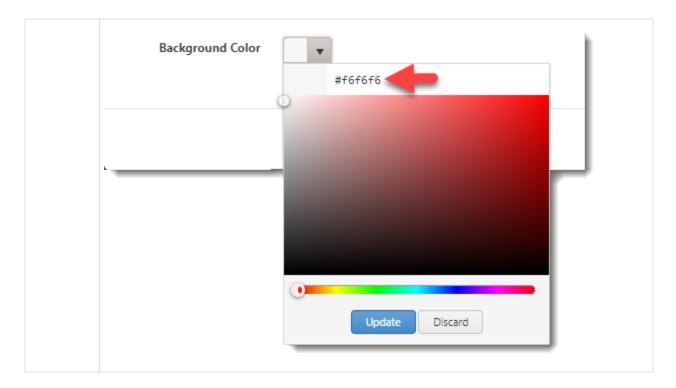




**Note:** You can use the **View HTML** option to make other changes and apply other custom effects that are not available on the toolbar.

- To add an image, such as a logo, drag and drop the image from your PC to the Messagefield. Then, drag the corners of the image. (It will resize proportionally.)
- Consider experimenting with adding a table and embedding an image (such as a logo) and any nearby text within its cells to hold those elements in place and control spacing between them. Drag the cell borders of the table cells to adjust cell widths and achieve the desired spacing as shown below:





- 8. When finished configuring the Help Center widget, click **Save**. You are returned to the Widget Layouts list. If your widget layout is new, it is displayed in the list as unpublished. (A new layout is displayed in italics and bold meaning it is unpublished.)
- 9. To publish a new widget layout, select the **Published** option in the far right column.
- 10. Test the widget by going to the target location identified in the Widget layout and adjust the widget control frame as necessary to ensure proper display.

## **Related Topics:**

• Adding Widget Layouts

# Widget: Image Display

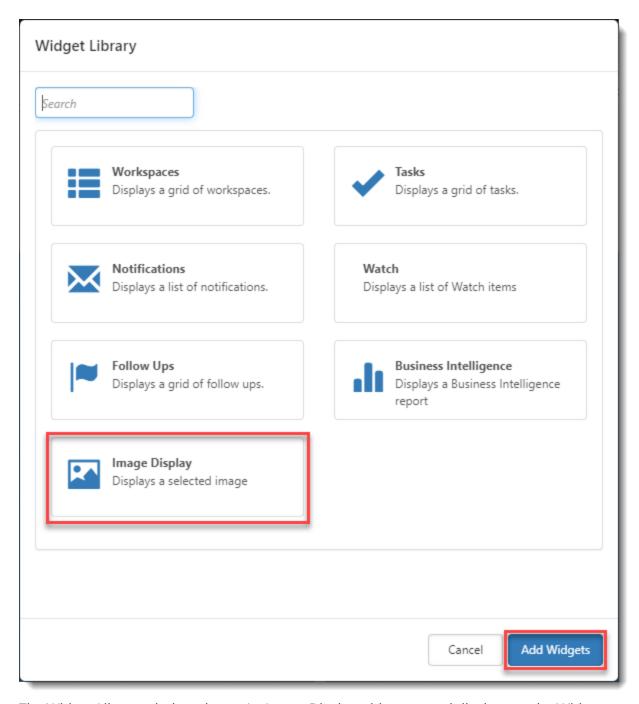
The Image Display widget displays a selected image on a defined **Target Type**: the Home page, any single-form dataform header, or a workspace landing page. (See Adding Widget Layouts for details on adding a new widget layout and a description of each **Target Type**.)

Optional configuration allows you (i.e., the Global Administrator) to also associate a link with the image so that when the image is clicked, a separate browser tab opens to the location. The link source can come from a field on a dataform or it can be specified in the **URL** field of the widget layout.

**Note:** When you configure the widget layout, you are responsible for sizing the widget and selecting a placement that allows the image dimensions to display properly.

### **To configure the Image Display Widget:**

- 1. Go to **System Admin** → **Widget Layouts**.
- 2. Click **Add Widgets** to add a new widget layout or click **(Open)** next to an existing layout in the grid to edit the widget layout.
- 3. On the Widget Layout Details window, click the **Add Widgets** button. The Widget Library window displays.
- 4. Click Image Display and then click Add Widgets as shown in the example screen below:



The Widget Library window closes. An Image Display widget control displays on the Widget Layout Details screen.

5. Drag the bottom right corner of the widget control to dimensions that will properly display the image. (Once you finish configuring the widget and test how the widget renders in the target location, you may need to adjust dimensions to ensure the image displays properly.)

- 6. Click the **Settings** button on the Image Display widget control.

  The Widget Settings window displays. This is where you point to the location of the image that displays in the widget and where you define hyperlink details (if you want the image to be used to open a web location when the image is clicked).
- 7. Complete the following fields as applicable. Some fields display or hide according to their relevance as you make selections. Therefore, all of the fields listed here may or may not display as you configure the widget.

#### Location

Defining an image **Location** is the starting point as you drill down from an initial image location to the exact file upload field containing the image you want to display in the widget.

 Current Workspace - Select this option to allow the system to dynamically reference the dataform and file upload field of a currently accessed workspace as the image source.

**Example Use Case:** You have added a widget layout with a **Target Type** of Workspace. You want the Image Display widget on the workspace landing page to change dynamically for users depending on which workspace is open and always show the logo of the current accessed workspace. To do this, select **Current Workspace** in the **Location** field. Specify a single-form dataform in the **Dataform** field, such as the Client Master, and then select the file upload field containing the logo in **Field**. For the desired outcome to occur, the following must be true:

- The specified dataform must exist for each workspace.
- The specified file upload field must exist on each workspace.
- The specified file upload field must used solely for storing a logo image for each workspace and cannot be empty or blank.

If all requirements are met, the result of this setup is that each time a user accesses a workspace (i.e., the "Current Workspace"), the logo for the current workspace displays in the Image Display widget on the Workspace Landing page.

• Other - Select this option to set the dataform and file upload field

of a specific workspace as the image source. When you select this option, the **WSID** field becomes available and is required. You must enter a workspace ID in the field. **Example Use Case:** You have added a widget layout with a **Target Type** of Home. There is a static image that you want to always display on the ClientSpace Home page. To do this, select **Other** in the **Location** field. Specify the workspace ID in the **WSID** field. Select a single-form **Dataform**, such as the Admin Workspace, where you are storing the image for the Home page and then select the file upload field containing the image in **Field**. For the desired outcome to occur, the following must be true: The workstation ID must be valid. The specified dataform must be valid on the workspace The specified file upload field must exist on the workspace. The specified file upload field must contain a file with an image data type and cannot be empty or blank. If all requirements are met, the result of this setup is that each time the ClientSpace Home page is accessed, the selected image always displays in the Image Display widget. **WSID WSID** is active only when a **Location** of Other is selected. This field allows you to pick a specific workpace ID as the image location. See the example use case in this table under **Location**. Dataform Select the **Dataform** where the image is located. **Note:** The selection list is filtered to display only single forms as multiforms are not permitted for this configuration. Field Select the file upload **Field** where the image is located. **Note:** The selection list is filtered to display only file upload fields. If the selection list is empty, no file upload fields exist for the selected **Dataform**. Selecting a file upload field that does not contain an image data type or is empty results in an error message displaying in the widget frame. "See the Troubleshooting: Error Message Meanings"

	section for details.
Hyperlink Location  Link Field	Optionally, pick a Hyperlink Location if you want a web location to display when the image is clicked. Select one of the available options:
	<ul> <li>Field (on same form) - Select this option if the external link is stored in a field located on the selected Dataform. When you do this, Link Field displays as a required field. Click the down arrow in Link Field and select the dataform field containing the external link details.</li> <li>Hardcoded - Select this option to type the web URL for the link.</li> </ul>
	When you do this the <b>URL</b> field displays. Type the external link details in this field.
Link Field	<b>Link Field</b> displays when the <b>Hyperlink Location</b> is set to <b>Field (on same form)</b> . Click the down arrow in <b>Link Field</b> to point to a dataform field that contains the external link details. This location displays in a separate browser tab when the image is clicked.
URL	<b>URL</b> displays when the <b>Hyperlink Location</b> is set to <b>Hardcoded</b> . Type external link details in this field. This location displays in a separate browser tab when the image is clicked.

- 8. When finished configuring the Image Display widget, click **Save**. You are returned to the Widget Layouts list. If your widget layout is new, it is displayed in the list as unpublished. (A new layout is displayed in italics and bold meaning it is unpublished.)
- 9. To publish a new widget layout, select the **Published** option in the far right column.
- 10. Test the widget by going to the target location identified in the Widget layout (i.e., the Home page, a single form dataform header, or a workspace landing page) and adjust the widget control frame as necessary to ensure proper display.

## **Troubleshooting: Error Message Meanings**

The error messages below display in the widget control frame in red letters when the value in the **Field** setting is invalid or missing.

Error	Cause	Solution
Unable to Display, not an image file	The file stored in the field that is being referenced in the <b>Field</b> setting is not a recognized image data type of .gif, .jpg, .jpeg, .png or .tif.	Upload an image file with a recognized image

Error	Cause	Solution
type.		file type.
No Image to Display.	There is no file present in the field that is being referenced in the <b>Field</b> setting.	Upload a valid image file.

### **Related Topics:**

• Adding Widget Layouts

# Widget: Milestones

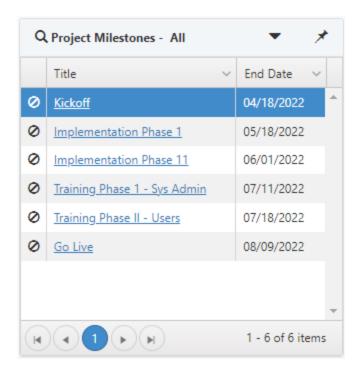
The Milestones widget displays a list of project milestones. The Milestones widget can be added to the workspace landing page. Project milestone records are sometimes triggered by workflow conditions or they can be manually added by clicking Q (View Project Milestones) > Add.

By system default, all milestone categories are displayed. To pin a specific category as the default view, click the down arrow and select the desired category:



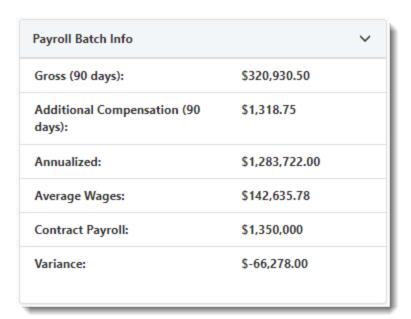
Then, click **★** (**Pin This Search**) to set the category as the new default view.

To restore the system default view, click **/** (**Restore System Default**).



# Widget: Payroll Batch Info

The Payroll Info widget is on the Workspace Landing Page when the Client Master Status is Client, Pending Termination, or Terminated. This widget provides insight into the variance of the proposed payroll from the Pricing Batch concerning actual payroll. Payroll numbers may appear skewed in specific scenarios where the client is seasonal or in cases where there are gaps in pay for employees.



Widget Definition	
Gross (90 days)	The sum of Gross Payroll values for the last 90 days based on the Pay Date where the payroll batch record has a <b>Batch Type</b> of R (Regular).
Additional Compensation (90 days)	The sum of additional compensation values for the last 90 days based on the Pay Date where the payroll batch record has a <b>Batch Type</b> of S (Special).
Annualized	The sum of Gross (90 Days) multiplied by 4.
Average Wages	The Annualized Payroll divided by a count of distinct Employees paid in the last 90 days.
Contract Payroll	The sum of Gross Payroll for each WC Code on the current activated Pricing Batch.
Variance	The difference between the Annualized Payroll and the Contract Payroll.

# Widget: Progress Bar

The Progress Bar is a living status bar. It is designed to display at the top of a dataform. It updates when a user sets a value in the dataform lookup field that you have designated to populate the Progress Bar.

For example, you can use a Progress Bar on the Client Service Case dataform to display case statuses of New, In Progress, Deferred, On Hold, Other, Complete, etc. The current status displays with a dark blue background, prior statuses display with a lighter blue background while future statuses display with a gray background.

Clicking the current status once collapses the prior statuses:

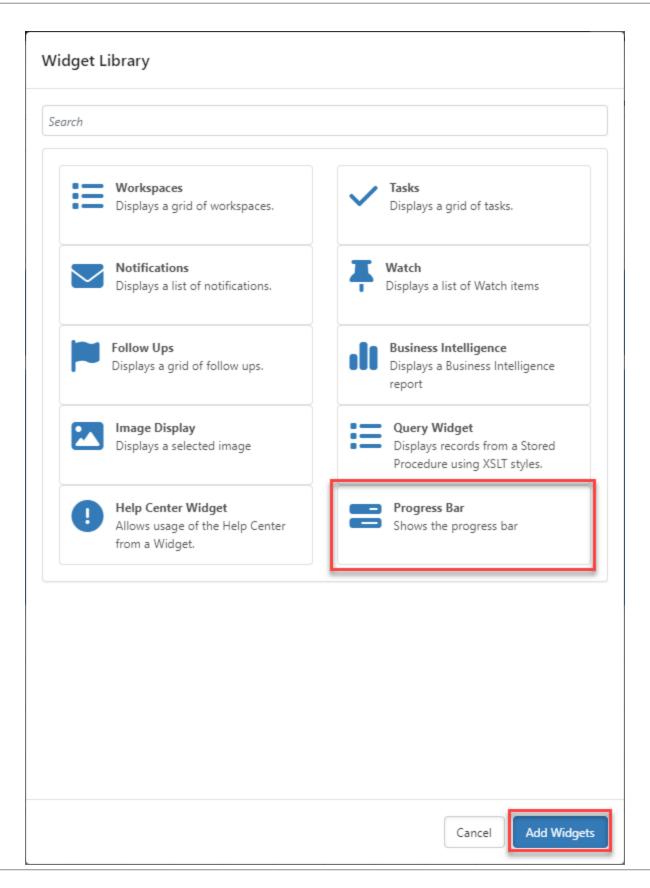


Clicking the current status a second time returns the progress bar to its prior state:



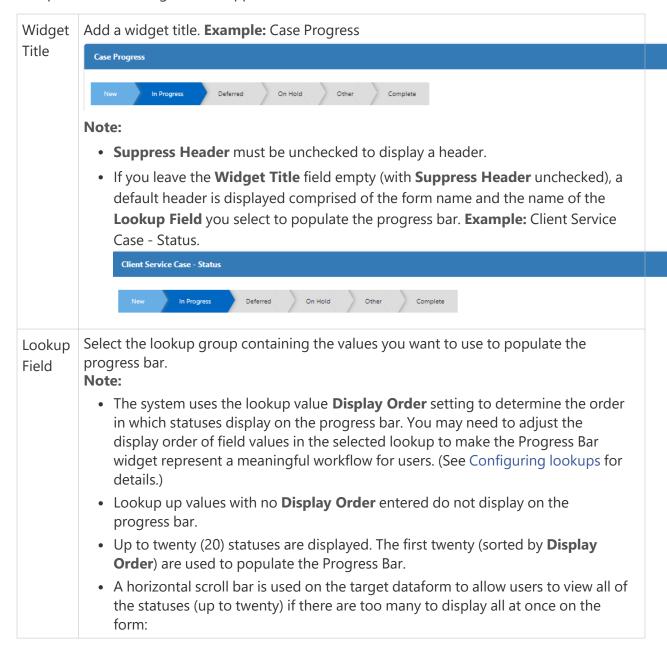
### To configure the Progress Bar Widget:

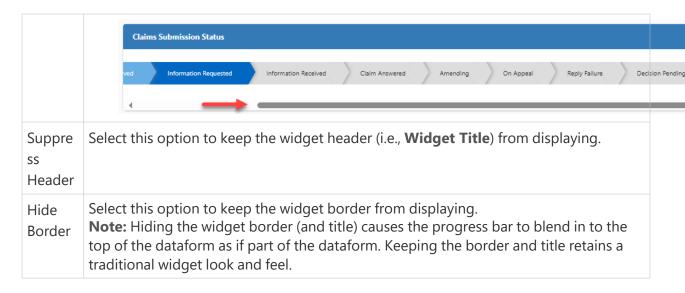
- 1. Go to System Admin → > Widget Layouts.
- 2. Add a new widget layout or click (Open) next to an existing layout in the grid to edit the widget layout.
- 3. Set the **Target Type** . The Target Type must be a dataform, such as the Client Service Case dataform.
- 4. On the Widget Layout Details window, click the **Add Widgets** button. The Widget Library window displays.
- 5. Click **Progress Bar** and then click **Add Widgets** as shown in the example screen below:



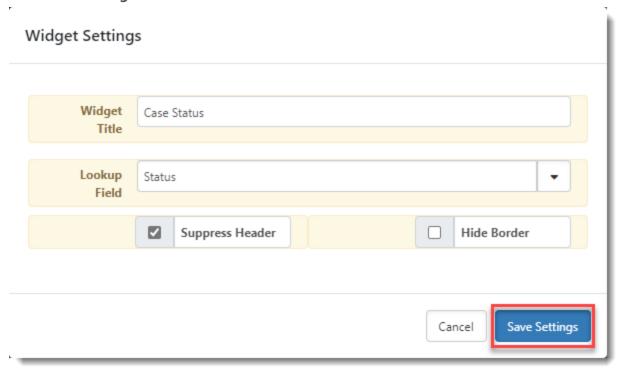
The Widget Library window closes. A Progress Bar Widget control displays on the Widget Layout Details screen.

- 6. Click the **Settings** button on the Progress Bar Widget control. The Widget Settings window displays.
- 7. Complete the following fields as applicable.





### 8. Click Save Settings.



The Widget Settings window closes and you are returned to the Widget Layout Details window.

- 9. Optionally, move or resize the widget frame:
  - **To resize the widget frame:** Drag the bottom right corner of the widget control to the desired dimensions.

**Note:** If you are displaying a title and borders or a horizontal scroll bar is being generated to display more than 20 lookup values, the default dimensions work well. If you are suppressing the title and borders to achieve a status bar that blends into the top of the dataform, you may wish to decrease the widget height to reduce the space between the Progress bar and any widget you set to display beneath it.

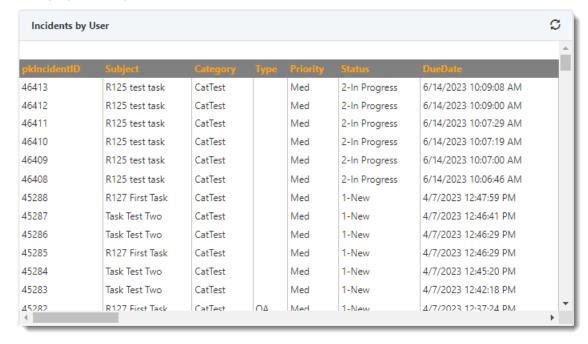
- To move the widget frame: Click anywhere in the blue area of the widget control area, hold down the left mouse button and drag it to the desired position on the grid.
   Note: Ideally, the Progress Bar widget is set as the first widget displayed in the layout. It is designed to display at the top of a dataform for an "at-a-glance" view of workflow progress.
- 10. Click **Save** on Widget Layout Details.
- 11. You are returned to the Widget Layouts list. If your widget layout is new, it is displayed in the list as unpublished. (A new layout is displayed in italics and bold meaning it is unpublished.)
- 12. To publish a new widget layout, select the **Published** option in the far right column.
- 13. Test the widget on a dataform matching the **Target Type** you selected in Step 3. **Note:** 
  - If you make changes to the widget settings and return to an open dataform to test the changes, remember to click the **Reload**© button in the Action Center to refresh the form with the latest changes.
  - Error handling is built into the Progress Bar widget. If there is an issue with the widget settings (such as no **Lookup Field** identification) that prevents the widget from rendering, an error is displayed in the widget frame as shown in the example image below:

We're having an issue displaying your widget.

Please contact your administrator if the issue persists.

# Widget: Query (XSLT)

The Query Widget displays a table



#### containin

g ClientSpace query results from a selected stored procedure in the following locations:

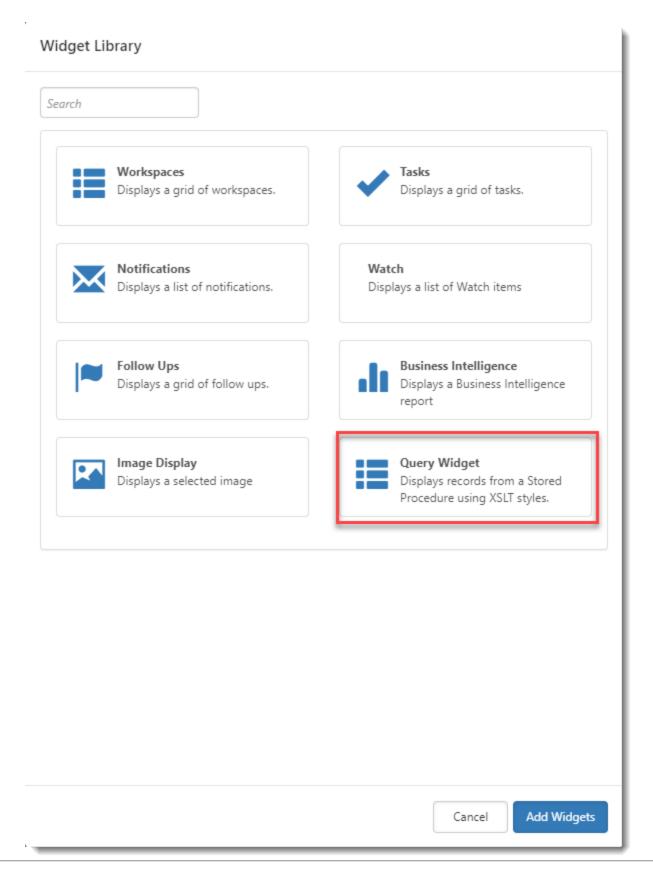
- Home page
- Workspace landing page
- · Dataform header

Optionally, upload an XSLT file containing custom table styles in the Widget Settings. (If no XSLT file is uploaded, the default ClientSpace table styles are used.)

A **Refresh** C button in the Query Widget title bar allows you to refresh the widget to see the latest updates.

### To configure the Query Widget:

- 1. Go to System Admin > Widget Layouts.
- 2. Add a new widget layout or click (Open) next to an existing layout in the grid to edit the widget layout.
- 3. On the Widget Layout Details window, click the **Add Widgets** button. The Widget Library window displays.
- 4. Click Query Widget and then click Add Widgets as shown in the example screen below:



The Widget Library window closes. A Query Widget control displays on the Widget Layout Details screen.

- 5. Click the **Settings** button on the Query Widget control. The Widget Settings window displays.
- 6. Complete the following fields as applicable.

XSLT File	. , ,	oload an XSLT file con ClientSpace default ta	_		-		you do not		
Stored Procedur e	Note: The sto	d procedure for the wored procedures used have a type of Query	to populate	the lis	t are in t	he Stored	Procedure		
Title	Type a widge	t title. The title display	s in the top I	eft co	rner of t	ne table he	eader.		
	Incidents By	y User						2	•
	pkIncidentID	Subject	Category	Туре	Priority	Status	DueDate		4
	57062	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 1:02 PM	2:11	
	57061	Scheduled   CatTest   Med   1-New   PM	2/14/2024 1:02 PM	2:11					
	57060		CatTest		Med	1-New	2/14/2024 11:36:11 AM		
57059 R133 task 57058 Real	57059	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:35:59 AM		
	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 11:26:35 AM			
	57057	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:26:06 AM		1
	1	RealTime Task From			2/14/2024	•	7		
Suppress Widget Header	Select this op	tion to keep the widg	et header fro	m dis	playing.				

	pkIncidentID	Subject	Category	Туре	Priority	Status	DueDate	
	57062	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 1:00 PM	2:11
	57061	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 1:00 PM	2:11
	57060	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 11:36:11 AM	
	57059	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:35:59 AM	
	57058	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 11:26:35 AM	
	57057	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:26:06 AM	
		RealTime Task From					2/14/2024	
orce Late		ting is applied, a data			_		_	-
oading		gets on the page have e visible on the datafo			-			
nk	,https://www. <b>Title</b> (if no <b>Li</b> t <b>Text</b> or <b>Title</b> pages, works	te address as a fully que google.com instead on the Text is entered) into turns blue and it beco pace landing pages, on browser window when	of www.goog to a hyperlinlomes an activer dataform h	le.com k. Onc e hyp	n) to con e the <b>Li</b> r erlink or	vert the <b>Lir</b> 1k is enterent associated	ed, the <b>Link</b> d Home	

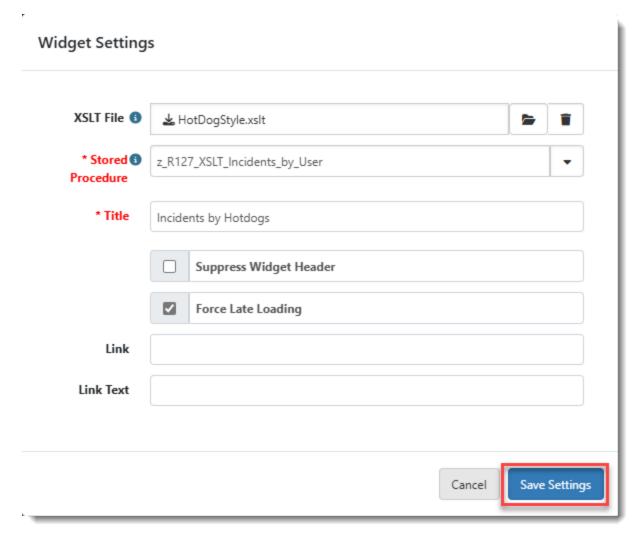
pklncidentID	Subject	Category	Туре	Priority	Status	DueDate	
57062	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 1:02 PM	:11
57061	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 1:02 PM	:11
57060	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 11:36:11 AM	
57059	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:35:59 AM	
57058	RealTime Task From Scheduled	CatTest		Med	1-New	2/14/2024 11:26:35 AM	
57057	R137 Scheduled test task	ClientService		Med	2-In Progress	2/14/2024 11:26:06 AM	

**Note:** You must enter **Link Text** or a **Title** to create a hyperlink. If you enter **Link Text**, the system uses it as the hyperlink text, overriding any **Title** field value that may be present. If you do not enter **Link Text**, the system uses any **Title** field value that may be present. If both **Link Text** and **Title** fields are blank, no hyperlink is created.

Link Text

If you entered a **Link** (see above), enter the hyperlink text you want to use here. If you prefer to use the **Title** text as the hyperlink text, you may leave this field blank.

### 7. Click **Save Settings**.



The Widget Settings window closes and you are returned to the Widget Layout Details window.

- 8. Drag the bottom right corner of the widget control to the desired dimensions. (The table widget has horizontal and vertical scroll bars to allow users to view rows and columns that do not fit within the frame dimensions.)
- 9. Click Save.
- 10. Test the widget in the selected display location (i.e., on a Home page, a workspace landing, or a dataform header.)

**Note:** Error handling is built into the Query widget. If there is an issue with the widget settings that prevents the widget from rendering, the error details are displayed in the widget frame as shown in the example image below:

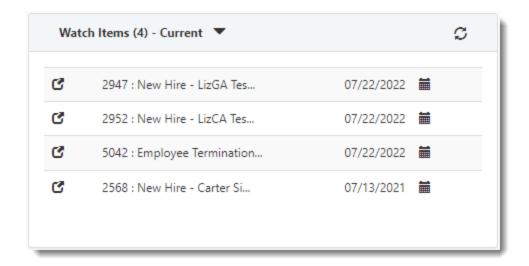
We're having an issue displaying your widget.

Please contact your administrator if the issue persists.

Error Message: The supplied file for this Widget is not a valid XSLT.

# Widget: Watch

The Watch widget displays watch items in a list. Watch items are pinned dataforms that you want to track and review by a specified **Review**Date. The Watch widget can be added to the ClientSpace Home page or to a workspace landing page.



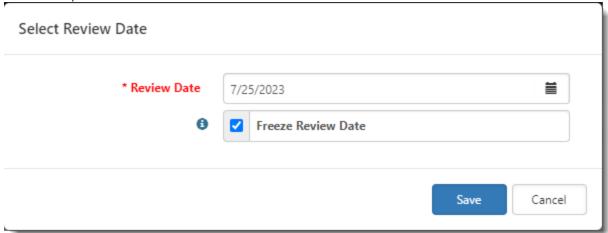
### **Pinning Dataforms**

### To pin a dataform to the Watch widget:

- 1. Open the dataform.
- 2. In the **Action Center** toolbar, click (Add this **Dataform to your Watch List**). The Select Review Date window displays with the **Review Date** field defaulting to the current date.
- 3. Accept the current **Review Date**, type a different date, or click **(Calendar)** to select a different date.



4. Optionally, click the **Freeze Review Date** checkbox to preserve the selected **Review Date** if the record is updated and saved.



**Note:** Watch widget functionality verifies the user who updates a dataform before determining if review date settings should be updated.

- If **Freeze Review Date** is selected, the **Review Date** for your pinned items stays the same when you make changes.
- If **Freeze Review Date** is not selected, the **Review Date** for your pinned items stays the same when you make changes.
- If Freeze Review Date is not selected, the Review Date for your items updates when others make changes.

#### 5. Click Save.

The watch item is listed in the Watch widget. The watch item name is comprised of the value from the **Default** field of the "watched" dataform followed by the workspace name in parenthesis. **Note:** If there is no **Default** field chosen for the dataform, then the dataform name will be displayed.

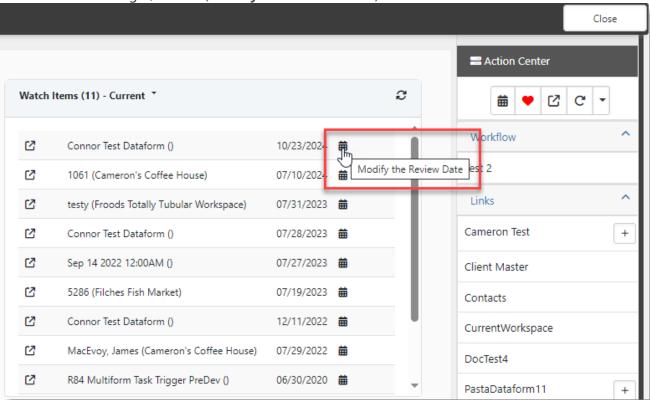
#### **Managing Pinned Dataforms**

#### To manage Watch widget items:

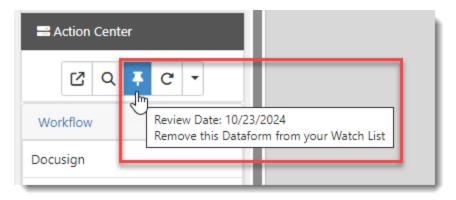
- If the watch item name is greater than 50 characters, you will see an ellipsis after the 50 character limit is met. To view the entire name, hover your mouse pointer over the watch item to see the full description.
- By default, the view is set to Current. Current watch items have a **Review Date** of the current date or prior (i.e., they are currently due for review or past due for review). Click the down arrow and select All to switch to a view that includes currently due, past due and not yet due items.

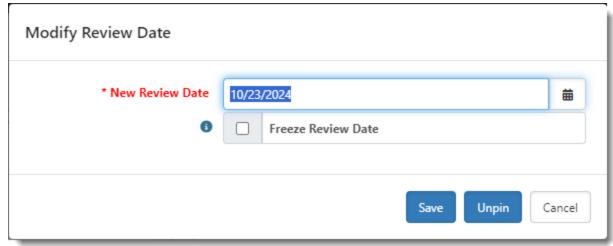


- To open the watch item dataform from the watch list, click **(Jump)** next to the watch item.
- To remove a pinned watch item from the list or to quickly edit a **Review Date**, access the Modify Review Date window using one of the following options:
  - From the Watch widget, click **(Modify the Review Date)**.

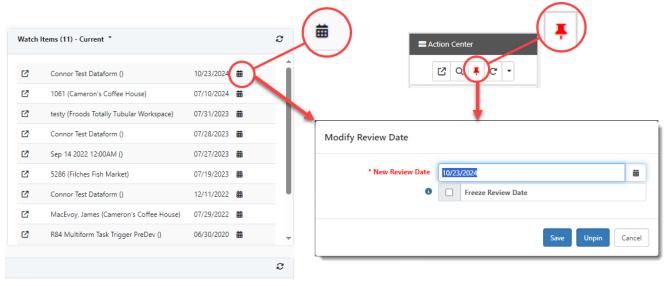


Open a pinned dataform. Then, click (Remove this Dataform from your Watch List).



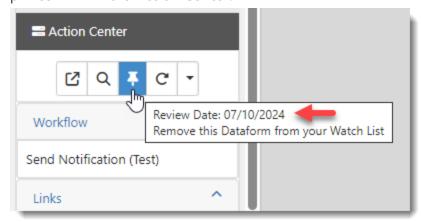


Both methods display the Modify Review Date window.



From here, you can:

- Update the review date in the New Review Date field.
- Select Freeze Review Date to keep the Review Date for your pinned items the same when you make changes.
- Click the **Unpin** button to remove a pinned watch item from the list.
- To quickly see the review date associated with the form for the current user login, hover over the pin icon in the **Action Center**:



**Note:** The hover text updates on dataform load. If you have recently applied changes to the current form which affect the review date, you can click **Reload** to update the hover text.

# Chapter 16 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.

When importing data, the system will only insert one instance of a single dataform into a workspace. The system performs validation for single dataforms to prevent the creation of duplicates for a

workspace. For example, if you attempt to import data into a single dataform in a workspace and there is an existing single dataform of that type in the workspace but the import ID in the import file does not match, the system will not insert the record. When this occurs, the system displays an error that indicates the workspace already has a record, and that the import will not continue.

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 be in a role with the **SYS**\_ **ImportManager** security entity appropriately defined. For details, refer to Configuring import management for non-Global Admins.

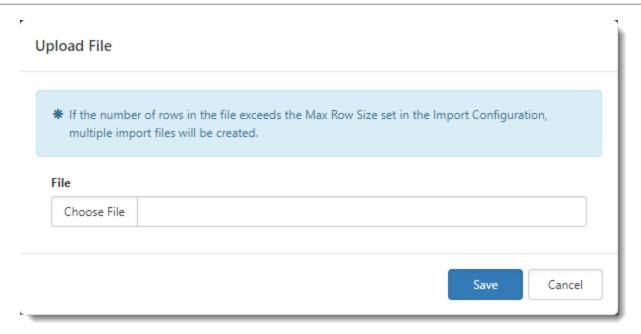
#### To manage data imports:

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. Click **Choose File** to browse to a local or network drive and select a file.
- 4. Click Save.

The file is listed in the dashboard grid area.

#### Note:

 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.



Log an Extranet case if you received this error and are not sure why.

If you are uploading a large file where the Max Row Size field has been set on the Import
Map Header Detail window (System Admin > Advanced > Configure Import) to split a
single large file into smaller files to improve processing, a progress indicator may appear on
your screen while the files are being created as shown in the example image below:



Once processing is complete, you will see multiple files listed. Each file will have "X of X" appended to the end of each file name to as shown in the example image below:



Note that each file is validated and run individually and separate log files containing any import errors will be created for each file.

See Configuring the Import Map Header and Managing Import Data.

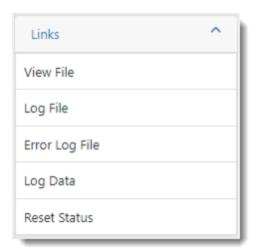
5. When a file (or files) has/have been properly added, **Validate File** becomes available. Validation compares the file structure to a preexisting import configuration to ensure that the file has all the required columns. Additionally, high-level validation is performed to ensure that the data types match the field into which the data is imported.



Successful validation enables the **Run Import** function.



- 6. 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**.
- 7. To review the success of your import or troubleshoot import issues, open the record and use the action item Links on the right: View File, Log File, Error Log File, Log Data, and Reset Status.



- **View File** Creates a download file in CSV format of your original import file in your Windows Downloads folder. The import file opens in Excel by default.
- Log File Creates a download LOG file (text file) showing the time stamp of when the import file processing began and ended. It lists both import failure errors and warnings by row number and lists a summary section of Rows Inserted, Rows Updated, Rows Skipped, and Rows Processed.

Log File errors include a detailed import failure reason:

**EX: Error for Update Only Imports:** Dataform Insert Not Allowed for data row [Row Number] [Import ID]: - This Import Map configuration only allows Updates, not Inserts of new records. No existing record was found based on the Record Source Column.

#### **EX: Errors for Insert Only Imports:**

- Dataform Update Not Allowed for data row [Row Number] [Import ID]: This Import Map configuration only allows Inserts. A record was found based on the Record Source Column and cannot be updated.
- Dataform Saved Errors for data row [Row Number] [Import ID]: This workspace already has a record saved for this dataform. Please reload the page and try again.

The Log File opens in Notepad by default.

• **Error Log** - Creates a download file in CSV format of rows that did not import from the original file. It does not include warnings. The **Error Log File** option only displays in the Action Center when rows did not import from the original file.

**Note:** The error log file honors import map detail settings that determine whether an issue is logged as an import failure. For example, if you have the **Allow Invalid Lookup Values** option set on the Import Map Detail record of an imported lookup field, any records with invalid lookup

values still import and will not appear in the Error Log. If **Allow Invalid Lookup Values** is not checked, the record does not import the import failure is logged in the **Error Log File**. The Error Log file opens in Excel by default.

- Log Data Displays import failure errors and warnings by row number on your screen.
- **Reset Status** Sets the row status back to "Ready for Import" removes all previous log information. This is typically used when a row import fails and the reason for the import failure can be fixed. The next step is to click **Reset Status** to place the row back in "Ready for Import" status so that you can attempt to import the row again.

**Note: Reset Status** is only available to Developer and Global Administrator users.

- 8. To view the log data for import errors:
  - **From the dashboard:** Select the import record and then click **View Log** (located above the dashboard grid area).

OR

• From the import record: On the dashboard, click (Open) next to an import file record and then click Log Data in the Action Center.

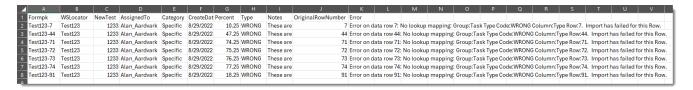
The log data displays similar to the following:

# Log Data No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:7. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:44. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:71. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:72. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:73. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:74. Import will continue for this Row. No lookup mapping: Group:Task Type Code:WRONG Column:Type Row:91. Import will continue for this Row. Close

#### 9. To view the error file for import errors:

• From the import record: On the dashboard, click (Open) next to an import file record and then click Error Log File in the Action Center.

This generates the error log file and saves it to your Windows Downloads folder as a .csv file. It includes the original row number from the import file. Error log file contents appear similar to the following:



**Note:** If you use the Business Intelligence module, you can create a report showing import metrics. View and/or schedule a report showing summary import metrics for multiple import processes in one report. The following information is included:: **Processing File Name**, **Rows Inserted**, **Rows Updated**, **Rows Skipped**, and **Rows Processed**. See Generating a BI Imports Report.

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.

#### **Related Topics:**

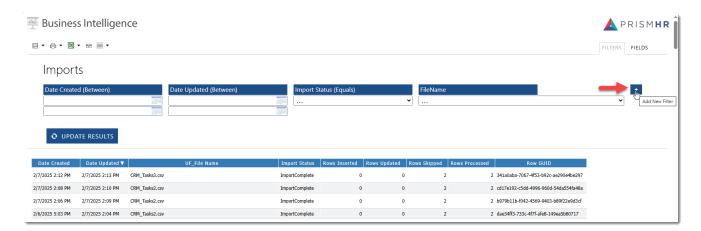
- Configuring the Import Map Header
- Generating a BI Imports Report

# Generating a BI Imports Report

If you use the Business Intelligence (BI) module with ClientSpace, you can run a Business Intelligence (BI) Imports report to generate a report showing aggregated import metrics for multiple import processes.

The report contains the following column data: **Date Created**, **Date Updated**, **UF\_File Name** (Upload File Name), **Import Status**, **Rows Inserted**, **Rows Updated**, **Rows Skipped**, **Rows Processed**, and **Row GUID**.

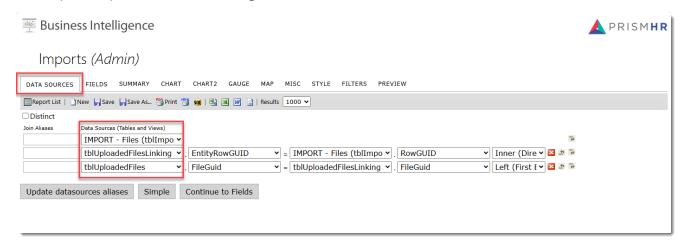
The report interface also includes built-in filters for **Date Created (Between)**, **Date Updated (Between)**, **Import Status (Equals)**, and **File Name**. You can add additional filters by clicking the **Add New Filter**button in the report interface header.



For more information on building your own BI reports, see Reporting with Business Intelligence.

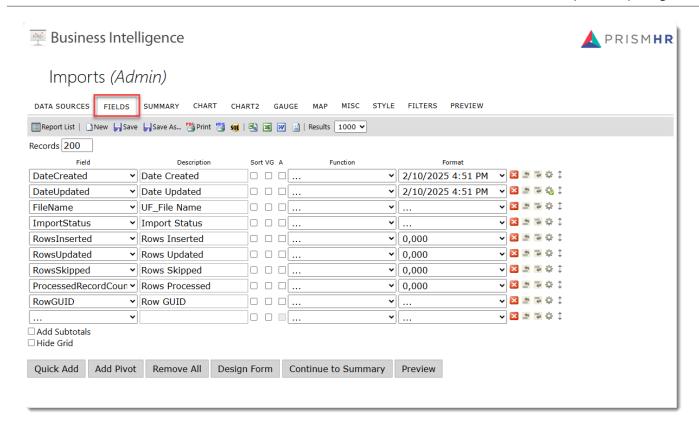
#### **Data Sources Tab Settings:**

The Imports report uses the following default data sources on the **Data Sources** tab.



#### **Fields Tab Settings:**

The Imports report is configured with the following default fields and field formats on the **Fields** tab..



# 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. 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.)
- 2. Add the Run Import module to your user profile. (Non-Global Admin users can perform this step.)

## Step 1: 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:

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** in the "To use an existing role" procedure below to add security entities and complete steps 3 through 15.

#### 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.
- Click Add. The Add Role Entities dialog opens.
- 4. Select **SYS\_ImportManager** and click **Ok**. You are returned to the Security Role Entities dashboard with the newly added Entity Name.
- 5. On the **SYS\_ImportManager** row, select the appropriate security entity rights for the role assignment.

**Note:** The **Delete** option is not applicable for SYS\_ImportManager security entity configuration.

View	View rights must be assigned to open the module and view the Manage Import window.  Note: Users with only View rights can also view any import files they may have previously added at a time when they were in a role with Add rights. However, without Add rights, they cannot add any new upload files or otherwise interact with their older upload files as the Run Import, Add, and Cancel Import buttons are hidden.
View + Add	Users can open the module and view the import files they upload on the Manage Import window.

	<ul> <li>Users can access the Run Import, Add, and Cancel Import buttons to run and manage imports.</li> </ul>
View + Add + Edit	• Users can open the module and view the import files they upload on the Manage Import window.
	<ul> <li>Users can access the Run Import, Add, and Cancel Import buttons to run and manage imports.</li> </ul>
	<ul> <li>Users can double-click a row on the Manage Import window to view the Manage Import Details page where import error messages are recorded in the Log File and Log Data for the selected import.</li> </ul>
View + Add + Edit + Admin	• Users can open the module and view the uploaded import files of <u>ALL</u> employees on the Manage Import window.
	<ul> <li>Users can access the Run Import, Add, and Cancel Import buttons to run and manage imports.</li> </ul>
	<ul> <li>Users can double-click a row on the Manage Import window to view the Manage Import Details page where import error messages are recorded in the Log File and Log Data for the selected import.</li> </ul>

- 6. Click **Close** on the Security Role Entities dashboard. You are returned to the opened role.
- 7. In the **Action Center**, select **Users**. The Security Role Users dashboard opens.
- Click **Add**.The Add Role Users form opens.
- 9. Select the applicable users and click **Ok**. The newly added users appear in the Security Role Users list.
- Click Close.You are returned to the role form.
- 11. To close the form, click **Cancel**.

## Step 2: Add the new module to your user profile

Now that the Run Import module is available and the new security entities have been added to a role, users assigned to the new role can add the new Run Import 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

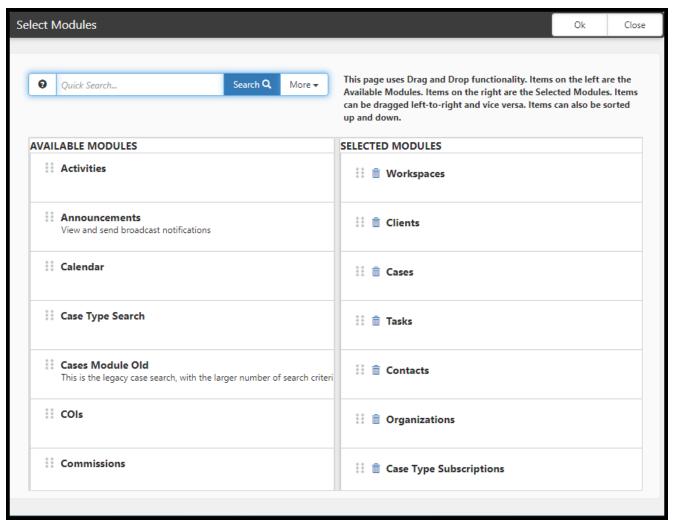
#### access to your favorite modules.



#### 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.
- In the Action Center, click Modules > Select Modules.
   The Select Modules dashboard opens.



- 3. Review the modules in the **Available Modules** list and locate the module to add.
- 4. To move the module to the **Selected Modules** list, complete the following drag and drop method:

- a. Place the mouse cursor over the module name in the Available Modules list.
- b. Press and hold down the left mouse button.
- c. Move the mouse toward the **Selected Modules** list while still holding down the left mouse button.
- d. Move the module up or down in the **Selected Modules** list. When you have moved the module to the desired location, let go of the mouse button.
- 5. Click Ok.

You are returned to the User Details screen. Your new module is listed in the Action Center, in the Modules group.

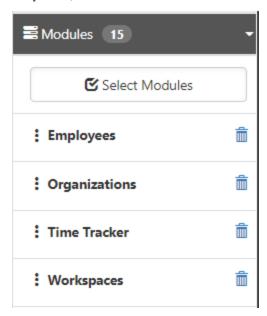
6. Click **Apply** or **Save**.

#### To manage the order of the modules that display in the Modules bar:

1. Review the current order of the modules that display in the Modules bar.

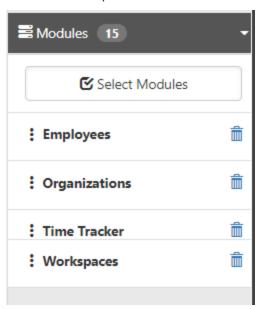


The top to bottom module order in the Modules panel of the Action Center on the User Details
dashboard determines the left to right module order in the Modules bar. Review the modules in
the Modules panel and locate the module to move up or down in the list (for example,
Workspaces).

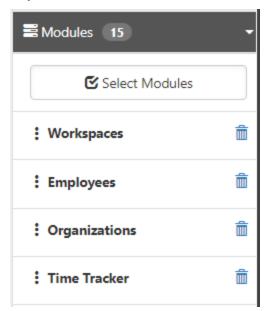


3. To move the module, complete the following drag and drop method:

- a. Place the mouse cursor over the module name.
- b. Press and hold down the left mouse button.
- c. Move the mouse up or down while still holding down the left mouse button.



d. When you have moved the module to the desired location, let go of the mouse button.



- 4. (Optional) Repeat step 3 for additional modules as necessary.
- 5. Click **Apply** or **Save**.

The modules in the modules bar update to reflect the changes.



# **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

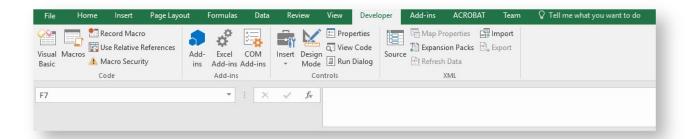
Microsoft Office allows you to run pre-recorded instructions on Excel data. To do so, you must write your code in a place and in a way that Office can understand; typically, by using the Visual Basic Editor. Although it is installed by default, many users do not know that it is even available until it is enabled on the ribbon.

#### Developer tab

One tab on the Office ribbon is the **Developer** tab, where you access the Visual Basic Editor and other developer tools. If Office 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

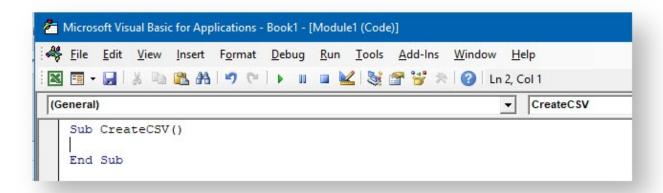
The following procedure shows you how to create a new blank workbook in which to store your macros. You can then save the workbook in the .xlsm format.

#### 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**.

```
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
            MsqBox ("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 1Column = 1 To 1ColumnCount
            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 1Row
            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

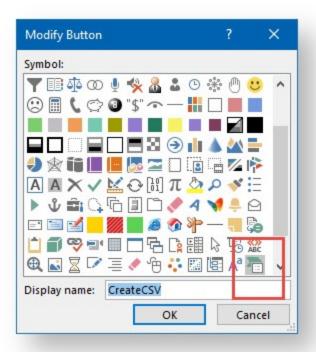
You can also get to the **Macros** dialog box from the **View** tab, but if you use a macro frequently, you might find it more convenient to access it with a keyboard shortcut or a **Quick Access Toolbar** button.

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**.
- 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.

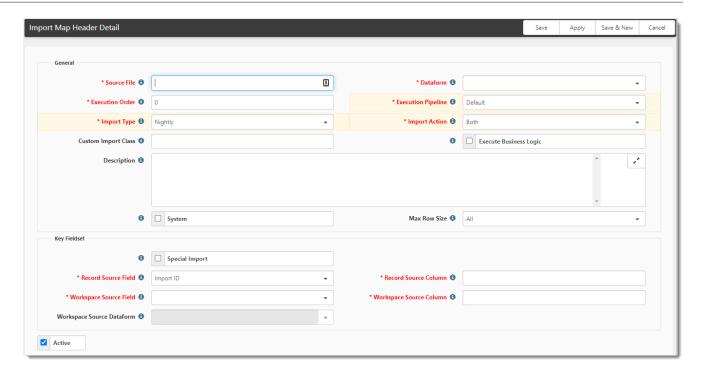
## Configuring the Import Map Header

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:

- 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.

	Note: If you are using the Pipeline Linking table to manage Pipeline Behaviors and you are configuring a new import record, the pipeline assigned a behavior of Default will auto-fill the Execution Pipeline field. If you are editing an existing import record, the Execution Pipeline entry remains intact until edited. If you change the entry, it is validated against the Pipeline Linking table. For instance, if a pipeline has been assigned a behavior of Allow or Default and you remove it, you will still be able to select it from the Execution Pipeline list. If the same pipeline is assigned a behavior of Disallow, you will not be able to add it again.  See Configuring Pipeline Linking.
Import Type	<ul> <li>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.</li> <li>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.</li> <li>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.</li> </ul>
Import Action	<ul> <li>Options include:</li> <li>Insert: Only insert new records. Does not update existing records.</li> <li>Update: Only update existing records. Does not insert new records.</li> <li>Both: Insert new records and Update existing records.</li> </ul>
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.
Max Row Size	This field is used to identify how many rows in the file will be processed before splitting a large file into smaller pieces. This can eliminate "timeout" issues with large uploaded files.
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:
	<ul> <li>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.</li> <li>ImportID: Inserts/updates the record in the workspace where the dataform of that type and the ImportID matches the</li> </ul>

	<ul> <li>Workspace Source Column from the source file.</li> <li>ProjectID: Inserts/updates the record in the workspace where the WorkspaceID matches the Workspace Source Column from the source file.</li> </ul>
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.

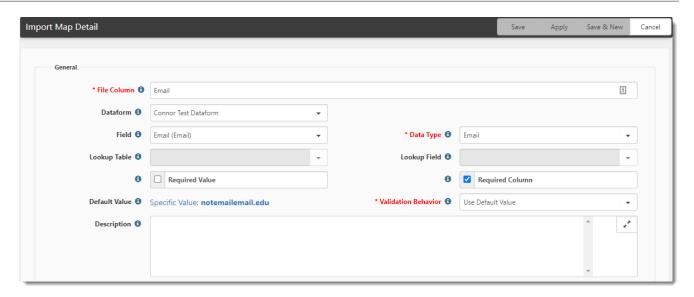
- 4. Click Save.
- 5. Continue to the next topic Configuring the Import Map Detail to add fields.

# 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.

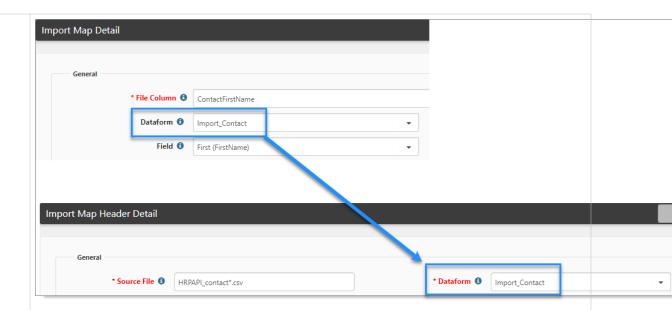
#### To configure the Import Map Detail:

- 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.
- To add fields, click **Add**.The Import Map Detail form opens.



## 3. Complete the required fields.

File Column	Required. This is the exact column header name from the data file you are importing. This field is case sensitive: <i>Clientname</i> is different from <i>ClientName</i> .
Dataform	Select a dataform. The system then provides a list of fields from that dataform in the Field list.
Field	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.

#### Data Type

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).
- Email: Properly formatted email addresses (for example,
   <RecipientName>@<DomainName>.<TopLevelDomain>). The Email Data Type uses the Default Value setting to determine how to handle a bad email address.

   See Default Value Options (below) for more information about the actions for a field with the Email Data Type.
- **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 associated Code value in the field. If there is no ImportID, then the system validates against the Group/Code value of the lookups to try and import.
- Number: Whole number or decimal.
- **Phone**: Formatted or unformatted phone number.

	<ul> <li>Text: Plain text value.</li> <li>Time: Similar to date, but should contain the Time value, such as 11:15 PM, that you would like to store in the field.</li> </ul>
Lookup Table	When the Data Type <b>Foreign Key</b> 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 <b>Foreign Key</b> 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	<ol> <li>You can configure this in several ways on a field-by-field basis.</li> <li>Click None.         The Default Value Options dialog box opens.     </li> <li>You can configure the default value field to handle blank values using the following options:</li> </ol>
	<ul> <li>None: If the Import file column is empty, clears the dataform field.</li> <li>Current Value: If the Import file column is empty, it leaves the current value in the dataform field.</li> <li>Specific Value: <ul> <li>If the Import file column is empty, set the value in the dataform field to the value provided (for example, "UseThisValue").</li> <li>If there is a problem with the configured Default Value, the Current Value is the default.</li> </ul> </li> </ul>
	Imports with Email Data Type Fields When you select a Data Type of "Email", the Validation Behavior field displays. This is a required field used to configure ClientSpace behavior when a missing or invalid email address is encountered in a PrismHR import record. If you choose the Use Default Value option, a row with a missing or invalid email address will import but the system applies a specified Default Value setting (i.e., a permitted substitution) in

place of the missing or invalid email address in the import record. For complete details on these settings, see the **Validation Behavior** field definition below.

#### 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 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**.

### Allow Invalid Lookup Values

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 multilookups, 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 against lookups with importIDs are logged and

**not** imported. If there is no importID on the Lookup value then validation will occur against the Group/Code value of the records. If this fails then the failed validations are logged and **not** imported.

When ClientSpace encounters a lookup error during import, the system displays a message that indicates whether the import was successful (allowed) or if the import failed (not allowed).

See Managing Import Data and Common import errors.

#### **API Path**

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.

#### Validation Behavior

When a **Data Type** of "Email" is selected, the **Validation Behavior** field displays. This is a required field used to configure ClientSpace behavior when a missing or invalid email address is encountered in a PrismHR import. Select a configuration option from the drop down list. Available options are:

- Fail Entire Row: Fails the entire import file row when a missing or invalid email is encountered. An error message is recorded in the Manage Import Details Log File and Log Data.
- **Use Default Value:** Allows the row to import but applies a specified **Default Value** setting (i.e., a permitted substitution) in place of the invalid email address in the import record:
  - None: Allows the row to import but sets the ClientSpace email field to blank if the incoming value is invalid.
  - Current Value: Allows the row to import but preserves the current value in the ClientSpace email field if the incoming value is invalid.
  - Specific Value: Allows the row to import but replaces the invalid email address with a specified value in the ClientSpace email field. The Specific Value is also validated. If the Specific Value is determined to be invalid, the entire row fails.

#### Note:

If you click the **Required Value** checkbox on the Import Map Detail screen and the selected **Data Type** is "Email", "Fail Entire Row" is set by default in the **Validation Behavior** field and cannot be edited (unless you uncheck **Required Value**). This informs the system that an email field entry is required in each import row. If the email value is missing (i.e., blank) in the import row, the row fails. No **Default Value** substitutions are permitted.

Descriptio n	A short description of the imported data being imported, such as the data source. 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:

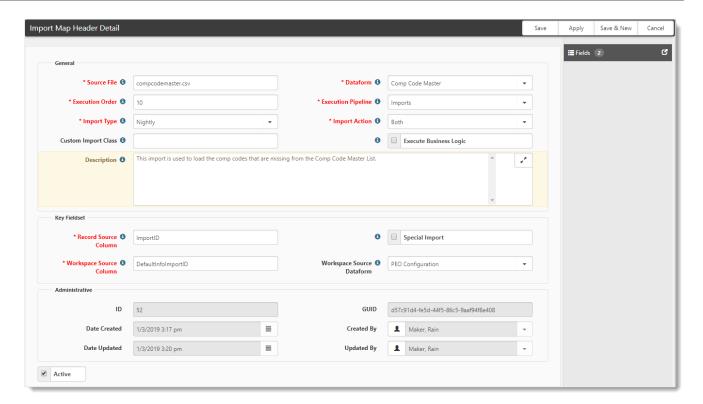
- Go to System Admin > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- In More Search, select All and click Search.
   All records display to include Active and Inactive.
- 3. Locate the record and click ☑ (Jump). The record opens.
- 4. Select **Active** to activate the 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:

- Go to System Admin → > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- 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.

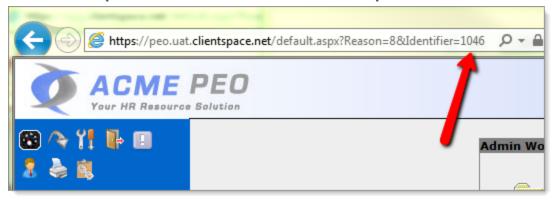
- The column headers must also be surrounded by quotation marks.
- This import is used to load the comp codes that are missing from the Comp Code Master List.

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.

## **Importing Tasks**

You can import tasks, also known as incidents, from another application (other than Salesforce as Salesforce imports tasks and other information using the Salesforce API.) New tasks or updated existing tasks are updated in the correct ClientSpace workspaces.

Before you can import mass updates, you must first configure the Import Map Header, review the business rule, create the Import file, and upload/run the import file.

## Step 1: Configure the Import Map Header and Fields

In this step, configure the Import Map Header and Details (the fields) for the source file **CRM**\_ **Incident\*.csv**. This file should already exist but please verify the configuration and add field mapping.

#### Locating the Import Mapping Source File

#### To locate the import mapping source file:

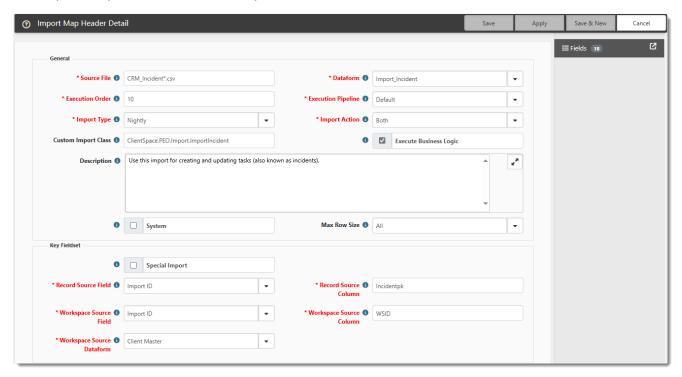
- Go to System Admin > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- 2. Search for the Source File **CRM Incident\*.csv**.

#### Verifying the Import Map Header and Mapping Fields

#### To verify the Import Map Header and Map Fields:

From the Import Map Header Search dashboard, click (Open) next to the CRM\_Incident\*.csv
 Source File.

The Import Map Header Detail form opens.



2. Verify the fields and edit if necessary. **Note:** This procedure does not include all form fields. It only includes fields relevant for the setup of this import. For a complete list of definitions of all import map header fields, see Configuring the Import Map Header.

Source File	Type CRM_Incident*.csv.
Dataform	Select Import_Incident.
Execution Pipeline	Select <b>Default</b> .
Execution Order	<b>10</b> is the default setting. It may need adjusting if you have multiple imports and dataform dependencies.
Import Type	Select <b>Nightly</b> . This means that the import will either be run manually from <b>System Admin &gt; Imports</b> > <b>Manage Import</b> or if you can run it automatically from a Windows schedule on the Server.
	<b>Note:</b> The automatic option is dependent on several factors, including the state of the import data from the external application. If the file requires "clean up" prior to import, automatically kicking off the file may not be possible. Please log an extranet case for assistance making the determination. Please also see the article on CSV Import File Creation Macro which outlines steps for developer users who want to create a properly formatted import file using a macro.
	For additional assistance, log an Extranet case.
Import Action	Select <b>Both</b> .
Custom Import Class	Type ClientSpace.PEO.Import.ImportIncident.
Execute Business Logic	Select this option. Enabling <b>Execute Business Logic</b> executes business rules when the imported dataform is saved.
Custom Import Class	Type ClientSpace.PEO.Import.ImportIncident.
Record Source Field	This is the field on the form used to locate the record. Select <b>Import ID</b> .
Record Source Column	Set the value to <b>IncidentPK</b> . The value in this field must match the column name in the import file, which means that the import file you create must have a column named <b>IncidentPK</b> .

	<b>During the import process</b> This column determines if an existing task record exists. If so, that record gets updated with this row's information. If not, a new record is inserted.
Workspace Source Field	Set the value to <b>Import ID</b> . This field is used to locate the correct workspace.
Workspace Source Column	Set the value to <b>WSID</b> . The value in this field must match the column name in the import file, which means that the import file you create must have a column named <b>WSID</b> .
Workspace Source Dataform	Select Client Master.

#### 3. Click Apply.

#### 4. In the right pane, click Fields.

The Import Map Search dashboard opens. Now you are ready to add the mappings from your import file (represented by **File Column**) that correspond to the fields on the Import\_Incident dataform (represented by **Dataform Field**). Add mappings for the following Incident\_Import Dataform Fields, taking note of the Datatype as this must be specified on the Import Map Detail record:

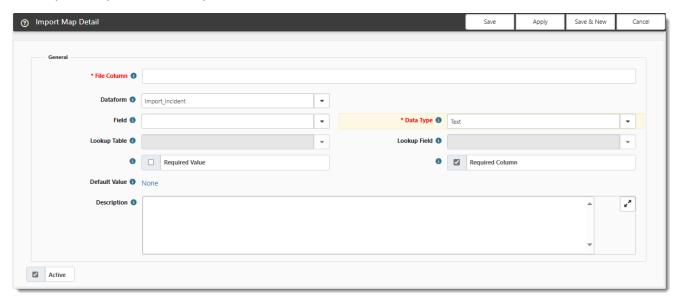
#### **Import\_Incident Fields and Datatypes**

<del>-</del>	
Dataform Field	Datatype
Body	Text
More Info	Text
Category	Text
Completed	Date
Due Date	Date
External Object	Text
Completed By	Text
Created By	Text
Owner	Text
Assigned To	Text
Delete	Text
Priority	Text
Start Date	Date

Dataform Field	<b>Datatype</b>
Send Notification	Text
SourceID	Text
Status	Text
Subject	Text

#### 5. Click **Add**.

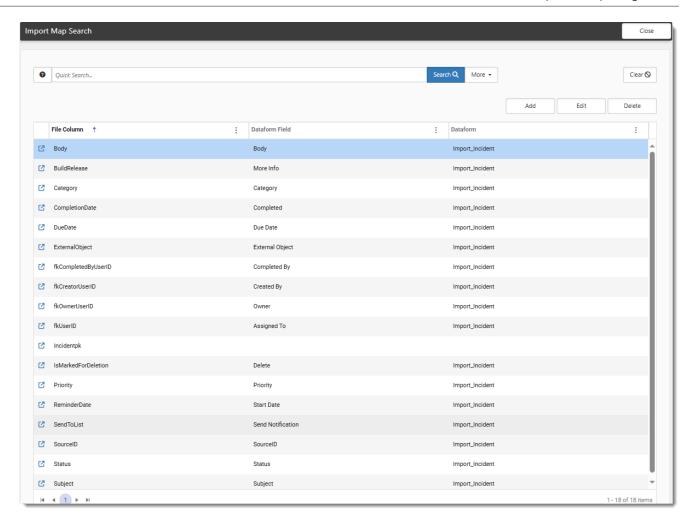
The Import Map Detail form opens.



- 6. Complete the mapping for the dataform fields.
- 7. Click Save & New.

This action saves the mapping and opens the form to add the next one.

8. When complete, you should see a list similar to following on the Import Map dashboard.

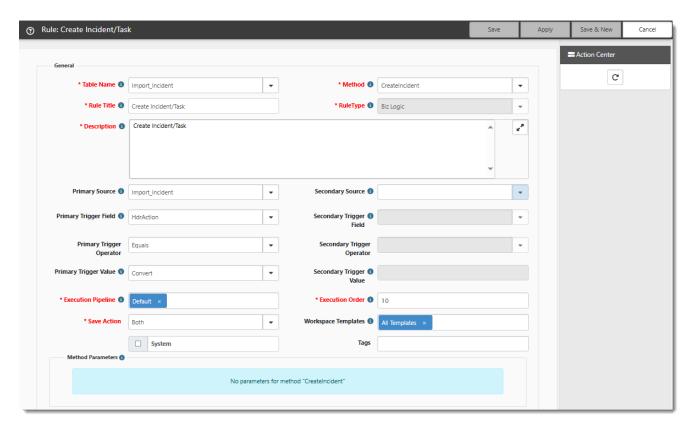


## Step 2: Review the Business Rule

Ensure that the **Create Incident/Task** business rule runs on the Default pipeline. Additionally, verify that the rule is Active.

#### To review the Create Incident/Task business rule:

- Go to System Admin → > Advanced > Manage Business Rules.
   The Custom Logic Rules dashboard opens.
- 2. In **Quick Search**, type **%Incident/Task**. The Create Incident/Task rule displays on the dashboard.
- 3. Click **②** (**Open**) next to the entry. The rule details display.



- 4. Ensure that **Default** is present in **Execution Pipeline**.
- 5. Ensure that **Active** is selected.
- 6. Click Save.

## Step 3: Create the Import File

Now you are ready to create the import file. The import file must contain the same column names as the mappings you established in Step 1: Configure the Import Map Header and Fields.

The import file must be a CSV file containing the appropriate mapped columns plus the **WSID** and **IncidentPK** columns used to locate the correct workspace and record when inserting/updating.

## Step 4: Importing the Task Data

The next step is to import the file to insert and update task data. This can happen as part of a nightly import or you can import manually. The steps in this section detail a manual import.

Before proceeding, be sure your file is appropriately formatted with comma delimiting and quote wrapping the text. Follow the instructions in the topic CSV Import File Creation Macro to walk

through creating a CreateCSV macro. Ensure that the file name begins with **CRM\_Incident** and ends in .csv.

#### To import task data:

- 1. Go to System Admin ❖ > Imports > Manage Import.
- Click **Add**.The Upload File dialog box opens.
- 3. Complete the fields and click Save.
- 4. When the uploaded file is added, click Validate File.
- 5. With the record in Validate Complete status, check the results of your validation. Open the record and use the action item links, and select Log File.
- 6. If there are no validation errors, click **Run Import** to begin the import process. If there are validation errors, make corrections before continuing. The action button reflects that the import process is **Running**. The file is processed, and each row is read and stored in the Import\_Incident dataform until the task is generated. Then, the dataform is deleted. Any errors encountered during file processing are stored in the Log File (without any disruption to Import\_Incident file processing). Finally, the imported task information is imported into new ClientSpace task records within the correct Workspaces. When complete, the action displays as **Completed**.
- 7. 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.
- 8. To view the log file for import errors, click **View Log**.

#### **Related Topics:**

- CSV Import File Creation Macro
- Configuring the Import Map Header
- Managing Import Data

## 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.

#### **Invalid Lookup Error logging**

When ClientSpace encounters a lookup error during import, the system displays a message that indicates whether the import was successful (allowed) or if the import failed (not allowed).

• If the **Allow Invalid Lookup Values** option is selected and the import encounters an error with a lookup value, the error message indicates that the import was successful (was allowed). For

example:

[01/13/21 15:49:16][509] No lookup mapping: Group:YesNo Code:T Column:YN2 Row:1. Import will continue for this Row.

 If the Allow Invalid Lookup Values option is NOT selected and the import encounters an error with a lookup value, the error message indicates that the import failed (was NOT allowed). For example:

[01/13/21 15:48:22][509] Error on data row 1: No lookup mapping: Group:YesNo Code:T Column:YN2 Row:1. Import has failed for this Row.

#### **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 spotcheck 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:

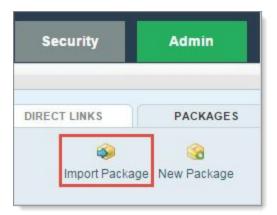
- Payroll Groups
- Payroll Schedules

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.

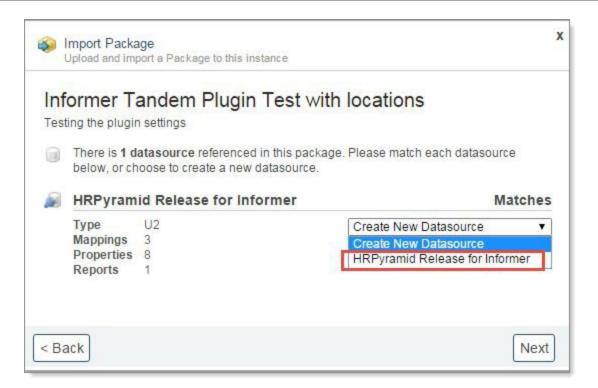
- 1. Open the targeted Instance.
- 2. Go to Admin > Packages.
- 3. Click Import Package.



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.

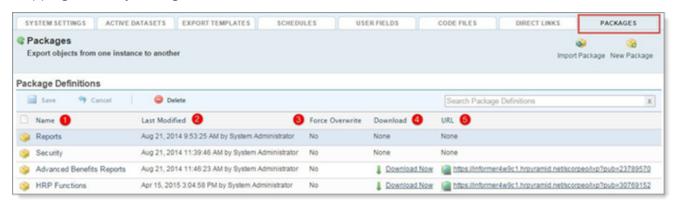


9. You can also import from the Reports Home page.



### 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.

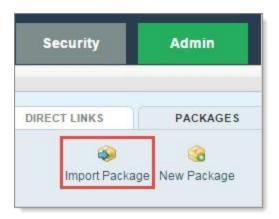


- 1. **Name**: Name of the package to easily identify contents.
- 2. **Last Modified**: Last time package contents were changed.
- 3. **Force Overwrite**: Shows whether a user must accept changes in the package.
- 4. The download link puts the package on a drive where it can be imported from.
- 5. Alternatively, you can create a link that you can mail or use that will download the package.

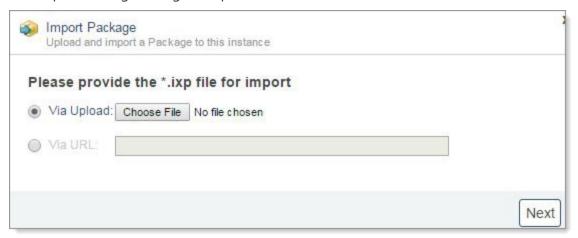
After a package is exported to your hard drive, you can then import it into another instance of Informer.

#### To import a package:

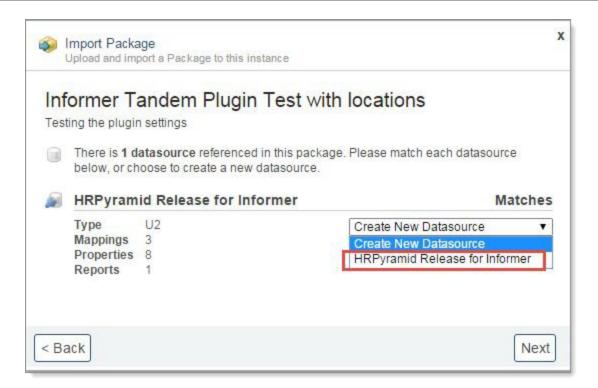
- 1. Open the targeted Instance.
- 2. Go to Admin > Packages.
- 3. Click Import Package.



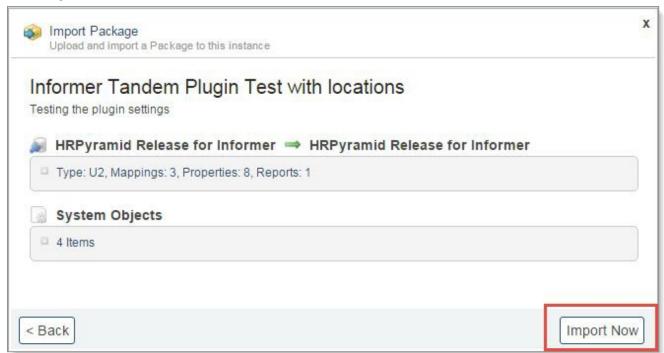
The Import Package dialog box opens.



- 4. Select either the downloaded file or enter the URL.
- 5. Click **Next**.
- 6. Navigate to **Documents** > **Informer** > **NewPluginTestReports**.



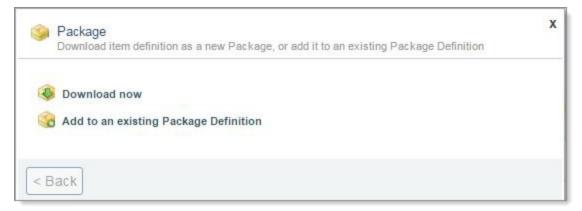
- 7. Select the appropriate data source. Do-**NOT** select Create New Datasource.
- 8. Click Import Now.



#### To export individual reports:

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, Global Administrators and Developer users 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 accessible from all dataforms and from the following CRM forms: Organization Detail, Contact Detail, and Task Detail by going to **Action Center > More options > External Source Linking**.

You can perform searches plus Add, Edit, and Delete records.

#### To access the dashboard:

1. Go to System Admin ❖ > Imports > External Source Linking OR

Go to any dataform in a workspace or CRM form (such as Organization Detail, Contact Detail, and Task Detail) and access it from **Action Center > More options > External Source Linking**. The External Source Linking dashboard displays a list of API records.

- 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 when added from a ClientSpace object such as tblOrganization, tblContact, tblIncident (task) ,gen_Whatever (ClientSpace Table).
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	The 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. However, you can click <b>Add New Log Entry</b> to manually append a log entry. You cannot edit or delete existing entries.

#### 4. Click Save.

### **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).

## How Does ClientSpace Handle External Source Linking Record Creation When More Than One Salesforce User Record is Associated with the Same Email Address?

When importing a Salesforce user record into ClientSpace, ClientSpace checks the user mapping (System Admin > Advanced > Configure Import > Fields > OrgAssignedTo) and then verifies the email address associated with the user mapping (using the Owner ID) and the Salesforce ESL User table in ClientSpace.

- If the email address already exists in the Users table: The existing ESL is updated with the External Object ID of the user who created the Salesforce Work Queue item.
- If the email address does not exist in the Users table: A new ESL record is created.

# Why is API Configuration not Displaying and not Saving When Trying to Create an External Source Linking Record?

If a custom link uses a custom function that references an API configuration and that configuration is inactive, the system will then:

- Will not display the existing external source linking record And
- Will not allow the creation of a new record using that inactive API configuration

## Chapter 17

## **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:

- 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).

## Schedule Sleep Time Window for Your processes

Use a sleep time window for a scheduled process to prevent the system from running the scheduled process during that time frame. A developer user can set the days, start time, and end time for a sleep window. For example, if a system undergoes weekly maintenance from 1:00 AM to 5:00 AM on Sunday mornings, a developer user can set a sleep time window for a scheduled process to avoid running the process during the system maintenance. The developer user can set the sleep window for the process to occur on Sundays with a start time of Midnight and an end time of 6:00 AM (to overlap the maintenance time frame). During the sleep time window, the system prevents the scheduled process from running. Using a sleep window for scheduled processes can minimize the chance of an error occurring during a scheduled process due to conflicts that might occur during activities like system maintenance.

#### To view your scheduled processes:

Note: This procedure is for developer users only.

- 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).

3. Complete the information in the **Developer Options: Sleep Window Settings** fields set.

Sleep Fields

Field Description

Days

Of The

The Days of the Week that will make this Scheduled Process sleep if it is triggered.

Week

The starting time of the Sleep Window. Applies to each selected Day.

Start Note: If the Start Time and End Time are the same time, or if the Start Time is not blank and the End Time is blank, the Sleep Window will be for that whole hour. For example, if the Start Time field contains 1 AM and the End Time contains 1 AM, the time frame for the Sleep Window is 1:00 AM to 1:59 AM.

This field indicates the end time of the sleep window. This setting applies to each day that you indicated in the **Days of the Week** field. End time always runs through the end of the hour selected, so selecting 1 AM as the end time means the sleep window will run through 1:59 AM.

End

Time

**Note:** If the Start Time and End Time are the same time, or if the Start Time is not blank and the End Time is blank, the Sleep Window will be for that whole hour. For example, if the Start Time field contains 1 AM and the End Time contains 1 AM, the time frame for the Sleep Window is 1:00 AM to 1:59 AM.

4. Click (Save).

## **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.

- 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.
Auto Archive BI Reports	Finds Business Intelligence reports that have not been run in 120 days and archives them. (These are default parameters that can be changed. See Configuring the Auto Archive BI Reports scheduled process.)
Benefit Batch Activations	Activates Benefits Batches in "Pending Activation" status on their renewal date. If the <b>Effective Date</b> of the batch is less than (<) today's date, the <b>Status</b> field on the batch changes from "Pending Activation" to "Active". The process is scheduled to run daily by default.
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.

Scheduled process name	Description
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.
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 the current status of those docs. Requires a DocuSign account.

Scheduled process name	Description
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.
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 OSHA Forms	Runs yearly to generate OSHA forms and append the resulting attachments to the OSHA Forms dataform of each associated workspace.
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 Workflow	Find all scheduled workflow from the Workflow Item table and trigger scheduled workflows for each based on <b>Date Offset</b> and <b>Grace Period</b> .

Scheduled process name	Description
Generate Scheduled Email Templates	Find all scheduled email templates from the Email Template table and trigger scheduled emails for each based on the fields in the Scheduled Email Scheduled Email Action section of the Step 1 Initial form. This includes <b>Scheduled Field</b> , <b>Date Offset</b> and <b>Grace Period</b> . See Configuring Scheduled Email Templates.
Import Cleanup (CORE)	<ul> <li>This scheduled process deletes the following:</li> <li>Completed import files that are ImportComplete and are greater than 5 days old.</li> </ul>
	<ul> <li>Completed import queue records that are Completed and greater than 1 day old.</li> </ul>
	<ul> <li>Import records with the Status of UploadComplete that are greater than 1 day old.</li> </ul>
	<ul> <li>Import records with the status of ImportCanceled that are greater than 1 day old.</li> </ul>
	• Import records with the status of <b>ImportInProgress</b> that are greater than 30 days old.
	<ul> <li>Import records with a status of ImportFailed that are greater than 30 days old.</li> </ul>
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.
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.

Scheduled process name	Description
PFML - State Compliance (Daily Aggregator	This process supports Delaware's PFML State Compliance. It identifies active clients with employees in Delaware and counts active Delaware employees, including those from related clients. The count of active employees, along with other programming logic, is used to generate a new PFML - State Compliance record on the client workspace. The PFML - State Compliance record is then used to trigger email templates to the Payroll Specialist on the PEO client team when the number of Active employees at a company (and any related companies) reaches a combined threshold that may require the start or stop of FMLA contributions by the company.
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.

Scheduled process name	Description
PrismHR Bill Records	This process exports Workers Compensation Claim Deductible Billing records to Prism HR when the billing records are in "Ready to Bill" status (and where the WC Deductible Bill Opt-Out setting on the Client Master record of each associated client workspace is unchecked.) It creates a "Bill Pending" record for each exported bill in PrismHR. Bill Pending Comment text, if entered, is also exported to the Comments field of the Bill Pending record in PrismHR. Upon a successful export, the process updates the status of the Claim Deductible Billing records in ClientSpace to "Billed" and writes "Successfully Created Bill Record in Prism" to the Export Log field of the exported Claim Deductible Billing records. If the export is not successful, the process updates the status of the Claim Deductible Billing records in ClientSpace to "Failed to Export" and writes an error message to the Export Log field of the affected Claim Deductible Billing records.
	Note:
	<ul> <li>Multi-tenancy is supported.</li> <li>Contact Professional Services for assistance configuring API parameters.</li> </ul>

Scheduled process name	Description
PrismHR Export Contacts	This process exports any contact to PrismHR when the <b>Sync With PrismHR</b> checkbox on the contact is checked.  The <b>Sync With PrismHR</b> is checked when a user adds a new contact or when a user updates any of the following fields on an existing contact:
	• contactName
	• contactTitle
	• contactPhone
	• contactPhoneExt
	contactEmail
	• comments fields
	<b>Note:</b> If these fields changed due to the PrismHR API, the system does not export the change to PrismHR.
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 Payroll Batch Ongoing	The PrismHR Import Payroll Batch Ongoing scheduled process is one of two Payroll Batch scheduled processes. It works in conjunction with the PrismHR Import Payroll Batch Sync scheduled process.
	<b>Note:</b> This breakout was done to prevent system performance issues that could arise when large payroll batches are processed at once.
	Runs first on batches marked Complete in Prism to process basic payroll information.
PrismHR Import Payroll Batch Sync	The PrismHR Import Payroll Batch Sync scheduled process is one of two Payroll Batch scheduled processes. By default, it runs on weekends (Saturday and Sunday) to process billing vouchers, pay groups and costs based on employee count from payroll batches. It works in conjunction with the PrismHR Import Payroll Batch Ongoing scheduled process.
	<b>Note:</b> By default, only 250 payroll batch records may be returned and processed at one time. This setting is controlled by the <b>BillingBatchCount</b> in the PrismHRAPI configuration.
	If the <b>Sync with PrismHR</b> checkbox is checked, the PrismHR Import Payroll Batch Sync schedule process runs after the PrismHR Import Payroll Batch Ongoing scheduled process on batches marked Complete in Prism. It processes billing vouchers, pay groups, and costs based on employee count information are processed. This process is set by default to Active and to only run on weekends.
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.

Scheduled process name	Description
PrismHR Import OSHA Location Data CLIENT	This scheduled process is queued from the link on the Client Master called <b>Retrieve OSHA Location Totals</b> . This link will check <b>OSHA Location Totals (Import)</b> on every location for the client. After the process is run, the checkbox is unchecked on the location.
	This scheduled process runs every 15 minutes and obtains location totals from PrismHR when the user has requested location totals. This process excludes location totals if the <b>Obsolete Date</b> on the Client Location dataform does not fall within the current OSHA year. If the <b>Retrieve OSHA Location Totals (Import)</b> field on the Client Location dataform is selected, this process retrieves location totals for each location that is not obsolete in the workspace. The scheduled process retrieves totals for the current year from PrismHR.

Scheduled process name	Description
PrismHR Import OSHA Location Data	This process is typically run yearly to pull in the previous year's worth of OSHA location totals on every client. This will not bring in the current year's OSHA location totals. You can update the number of years, via the PrismHRAPI API Configuration using the OSHAYearsToProcess parameter in the PrismHR API Configuration. EX: Enter 1 for 1 year of data. 2 for 2 years of data, and so forth.  Note: You must also enable the SyncOSHAClients parameter in the PrismHR API Configuration by setting it to 1.  This process excludes location totals if the Obsolete Date on the Client Location dataform does not fall within the selected OSHA year (or years). 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 or OSHA 300A ITA File merge.  The process runs for all PrismHR clients in Under Contract, Client, Pending Term, and Term statuses.

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 <i>nn</i> number of clients, with the number of clients ( <i>nn</i> ) 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 <i>nn</i> 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.
PrismHR Scheduled Initial	This scheduled process allows selection of specific types of PrismHR or HCM Initial Imports to run for a single API configuration OR for multiple API configurations. The Initial Import form is completed and queued from the Admin Workspace. See Scheduling an Initial Import.

Scheduled process name	Description
PrismHR Update Web Service User	This scheduled process updates Web Service User permissions for data masking. It is used for ClientSpace-to-PrismHR integrations such as the View PrismHR Employee Info feature which allows users to view employee data from PrismHR when they click the <b>View PrismHR Info</b> link on an employee record. The frequency must be set to run every minute since this feature allows users to retrieve data from PrismHR in real time.
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.

Scheduled process name	Description
Salesforce Sync Rest API	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.
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 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)	<ul> <li>Find all new time tracker users and insert their records into the Notification and notification users table.</li> <li>Find all users with open time records over the preset threshold and notify them: "You have not updated your time in X minutes."</li> <li>Find all users without open time records and notify them: "You currently have no open time records."</li> </ul>

Scheduled process name	Description	
Vouchers	HRPImportVoucher. For Initial Imports, it only retrieves ClientSpace Clients in Client, Terminated, and PendingTermination status.	

# Chapter 18

# 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:

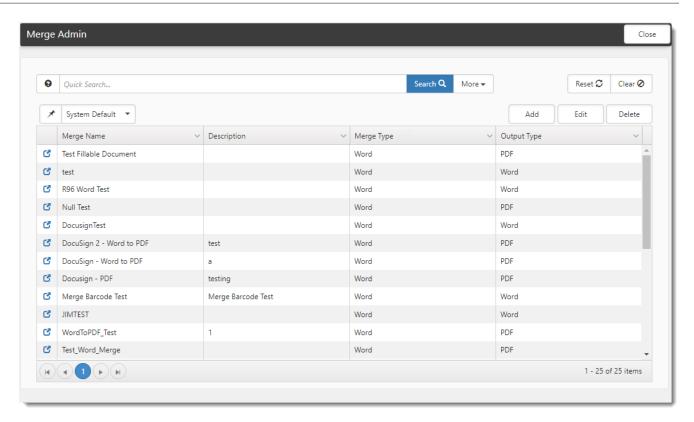
- Stored procedure that gathers the ClientSpace data.
- File template that contains the merge fields and instructions for presenting the data that is retrieved using the stored procedure.
- Type and Output Type.

**Note:** You cannot delete System merges. This includes *isdeveloper* users.

### **To access Merge Admin:**

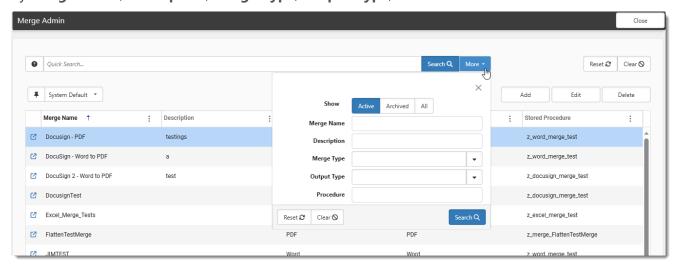
Go to System Admin → > Outputs > Merges.

The Merge Admin dashboard opens, showing a list of your existing merges.



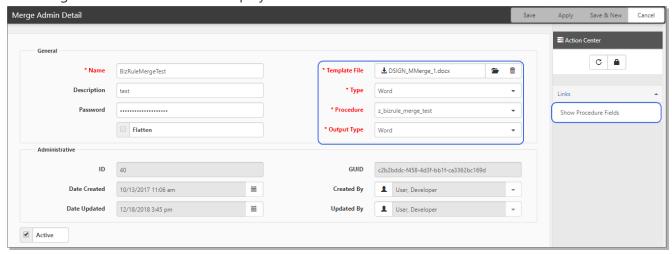
From here, you can Add, Edit (and view), or Delete a Merge record. However, you cannot delete a System merge record.

You can also search for merges using Quick Search and More Search. More Search allows searches by **Merge Name**, **Description**, **Merge Type**, **Output Type**, and **Procedure**.



### To add or edit a merge record:

- 1. On the Merge Admin Dashboard:
  - To add a new record, click the **Add** button.
  - To edit an existing record, locate the record and click (Jump). The Merge Admin Detail window displays.



### 2. Complete the applicable fields.

Name	Type a descriptive name for this merge record.
Template	<ul> <li>This is where you upload the template file.</li> <li>a. Click (Upload File). The Upload File dialog box opens.</li> <li>b. Click Choose File.</li> <li>c. Locate the file on your computer and click Open. The file name displays.</li> <li>d. 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.</li> <li>e. For Description, type a description of the uploaded file. Optional.</li> <li>f. For Category, select an entry from the list. Optional.</li> <li>g. Click Save.</li> </ul>
Description	Type a descriptive title of the merge record.
Туре	Select a file type: <b>Word</b> , <b>Excel</b> , <b>PDF</b> .
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 <b>Type</b> is Word or Excel. For <b>Type</b> Word you can generate a Word doc or PDF, for Type Excel you can generate an Excel file or PDF.

### 3. Click Save.

### **Word Merge Proc**

One of the procedures that you can select from the **Procedure** list is **peo\_merge\_word\_companydata**. The following table outlines some of the fields available for this procedure.

Company data	Description	
Related Sales Rep (fkAssignedToUserID from Org) user	Email, Phone, Job Title, First Name, Last	
information	Name	

Company data	Description
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**. The following table outlines some of the fields available for this procedure.

Employee information (Employee Tab)	
<ul> <li>FirstName</li> <li>LastName</li> <li>CensusID</li> <li>luSUTAState</li> <li>CompCode</li> <li>AnnualPay</li> <li>MiddleInitial</li> <li>luPayFrequency</li> <li>Address1</li> <li>Address2</li> </ul>	<ul> <li>County</li> <li>Phone</li> <li>Mobile</li> <li>Email</li> <li>crGender</li> <li>DOB</li> <li>crEmploymentStatus</li> <li>JobTitle</li> <li>crEmploymentType</li> <li>StandardHoursPerPeriod</li> <li>AnnualPayPctChange</li> </ul>
<ul><li>City State</li><li>ZipCode</li></ul> Benefits information (Employee Tab)	AnnualPayPctChange
<ul> <li>HealthWaived</li> <li>HealthPlanCode</li> <li>luHealthCoverageLevel</li> <li>HealthEffectiveDate</li> <li>DentalWaived</li> <li>DentalPlanCode</li> <li>luDentalCoverageLevel</li> <li>DentalEffectiveDate</li> <li>VisionWaived</li> <li>VisionPlanCode</li> <li>luVisionCoverageLevel</li> </ul>	<ul> <li>VisionEffectiveDate</li> <li>VisionTerminationDate</li> <li>LifeEffectiveDate</li> <li>LifeTerminationDate</li> <li>luDeductionType</li> <li>luEnrollmentStatus</li> <li>ContributionAmount</li> <li>TotalContribution</li> <li>WaitingPeriodDate</li> <li>EstAnnualWages</li> </ul>

Many other fields are available and are listed by tabbed section of the **peo\_merge\_excel\_companydata** Excel report template. These include:

- Contacts
- Locations
- PricingStates
- PricingCodes

- Surcharges
- Commissions
- ExistingBenefitPlans
- OffereredBenefitPlans

#### Note:

The Company Data merge report procedure (peo\_merge\_excel\_companydata) sets the value in the **Client Report State** column using the following logic:

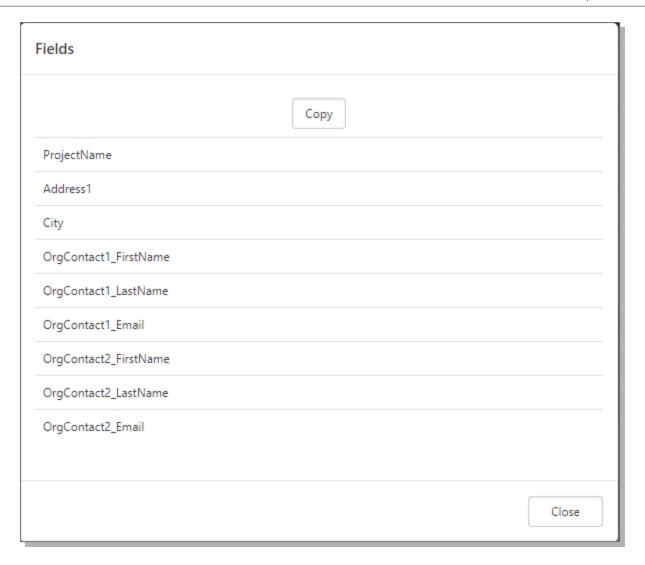
- Step 1: Check the **Client Report State** on the State Master record.
  - o If checked (i.e., "True"), set Client Report State to "True"
  - If unchecked (i.e., "False"), go to Step 2.
- Step 2: Check the **Client SUTA Reporting** field on the State Legal Entity.
  - If checked (i.e., "True"), set **Client Report State** to "True".
  - If unchecked (i.e., "False"), set **Client Report State** to "False".

### **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 <u>addendum</u> 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				
	First Payroll Batch	#VALUE!					
	Last Payroll Batch	#VALUE!					
	Total PB	Total WSE Paid	Total Gross Wages				
Regular				Total Checks Processed			
Special				Average EE Count			
М							
Total Other							
Count of Payroll Batches							
	Revenue	Cost	Profit				
Gross Wages	\$0.00	\$0.00	\$0.00				
Admin Fee	\$0.00	\$0.00					
FICA	\$0.00						
FUTA	\$0.00						
SUTA	\$0.00						
Workers Compensation	\$0.00	\$0.00	\$0.00				
Date Paid	Bill Code	Bill Code Category	Bill Code Cost	Bill Code Amount	Batch Type	Batch Number	WSE Paid

## Benefits Renewal Merge

The Benefits Renewal merge exports Benefits Plan details and Benefits Batch data from ClientSpace into an Excel Spreadsheet, referred to as the Benefits Renewal Workbook, so that you can analyze and compare the offered benefits for each benefits plan in a batch.

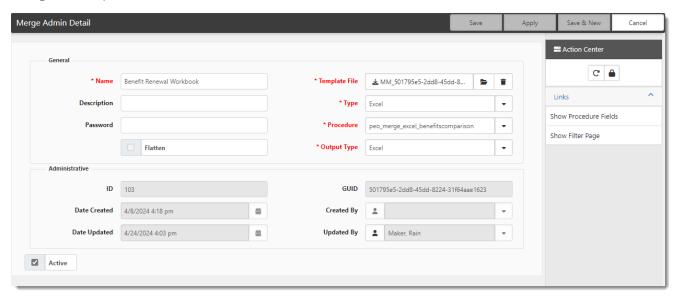
This topic covers configuration details, how to enter coverage counts and how to run the merge. There is also a demo video included.

**Note:** You can set up your own email template to use with DocuSign to get a client's approval on their selected Offered Benefit Plans (if you have DocuSign integration). Even if you do not have DocuSign integration, you can still use the "DocuSign version" of the Benefits Renewal Merge to get client approval as this version contains signature lines. See the Getting OBP Approval section in this topic for additional details.

For a video demonstration on how to run the Benefits Renewal Merge and created the Benefits Renewal Workbook, also see Learning how: Creating a Benefits Renewal Workbook.

## Configuration

Both the merge record and associated link are **Active** and available by default. The link is secured to the Benefits\_Member role. No merge record configuration is required. However, users with access permissions to view Merge Admin Detail configuration can go to **System Admin** > **Outputs** > **Merges** and open the **Benefit Renewal Workbook** record:



## **Entering Coverage Counts**

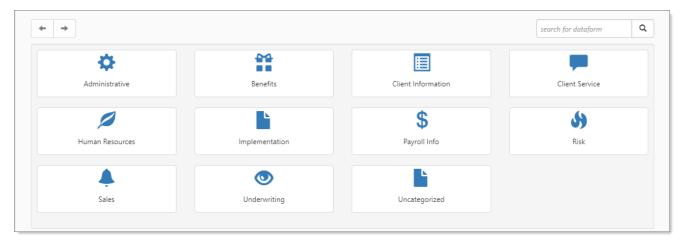
While most of the information used in the spreadsheet calculations do not require user data entry, you are required to provide **Coverage Count** details on each Offered Benefits Plan record in the batch. These counts are used in the spreadsheet calculations.

**Note:** If you are running the Benefit Renewal Workbook Excel merge in a parent company workspace, ClientSpace also retrieves any coverage counts entered on child workspaces and displays a combined total for each **Coverage Count** shown in the spreadsheet if the following is True:

- The parent company must be specified in the **Benefit Parent Company** field of the child Benefits Batch dataform.
- There must be a policy and benefit group match found on an offered benefit plan in both the
  parent and child workspaces. For example, if the Parent Company has an offered benefit plan
  containing Policy A with a Benefit Group of B, the Child Company must also have an offered
  benefit plan containing Policy A with a Benefit Group of B.
   Counts will not be combined on any offered benefits plans where there is not an exact match to
  the policy and benefit group in the parent and child workspaces.

#### To enter the Coverage Counts:

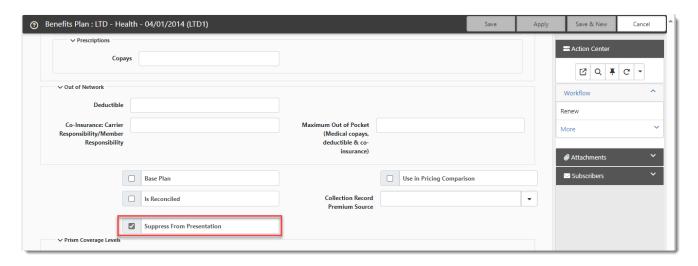
- 1. Open the Benefits Batch record from which you want to run the Benefit Renewal Workbook Excel merge.
  - a. From the modules bar, click **QWorkspaces**.
     The Workspace Search dashboard (i.e., workspace landing page) opens.
  - b. Select a workspace and click (Open).
     The Workspace page opens.
  - c. Scroll down the page to the administrative tiles where you see the dataform categories.



- d. Click **Benefits** and then click the **Benefits Batch** tile.
- 2. On the Benefits Batch dataform, in the Action Center under **Links**, click **Offered Benefit Plans**. If there is only one offered benefit plan, the Offered Benefits Plan dataform displays the plan details. If there is more than one offered benefit plan, the Offered Benefits Plan dashboard displays. Click (Open) next to an offered benefit plan to display the plan details.
- 4. Scroll down to the **Coverage Count** sub-fieldset (located within the **Coverage Details** fieldset and fill in **EOCount**, **ECCount**, **EKCount**, and **EFCount** fields:
  - EOCount = Employee Only coverage count
  - ECCount = Employee + Children coverage count
  - EKCount = Employee + Domestic Partner coverage count
  - ESCount = Employee + Spouse coverage count
  - EFCount = Employee + Family coverage count
- 5. Click Save or Apply.
- 6. If there is more than one offered benefit plan, return to the Offered Benefits Plan dashboard and repeat steps 4 and 5 until coverage counts are filled in for all offered benefit plans in the Benefits Batch.

### Excluding a Plan from the Comparison

If there is a benefit plan you want to exclude from the calculations, click the **Suppress From Presentation** field located on the Benefits Plan record.



## Running the Merge

You can only run the merge on a Renewal batch (i.e., the batch type shown on the Benefits Batch dashboard must display **Renewal** in the **Type** column.)

#### To run the merge:

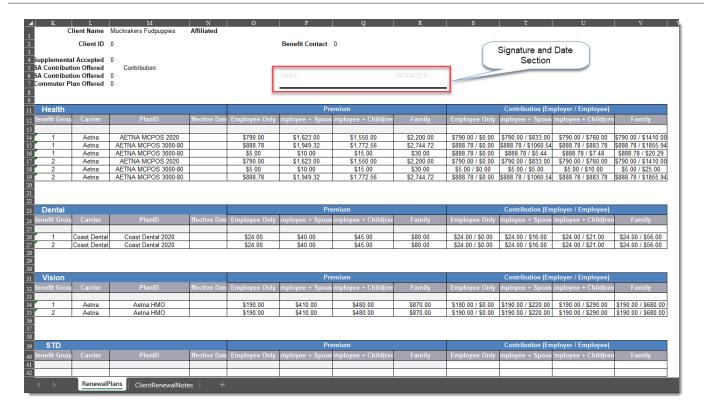
On the Benefits Batch from which you want to run the Benefit Renewal Workbook Excel merge, click the **Renewal Workbook** link located in the **Action Center** under **Reports**.

You can retrieve the merge document from your Windows Downloads folder.

## **Getting OBP Approval**

You can use the **DocuSign Benefit Renewal** merge record and custom link and then set up your own email template to use with DocuSign if you have DocuSign integration. (See DocuSign.)

If you do not have DocuSign integration, this document can still be used to obtain a signature even without DocuSign as it is a summary of selected OBPs and contains placeholders for the signature and signature date:



### To run the merge:

On the Benefits Batch from which you want to run the Benefit Renewal Workbook Excel merge for use with DocuSign, click the **Docusign Benefit Renewal** link located in the **Action Center** under **Reports**.

Clicking the link generates a Benefit Renewal Document Merge Template Excel file in your Windows Downloads folder. The **RenewalPlans** tab displays a summary of selected OBPs and the **ClientRenewalNotes** tab displays exported notes from the **Client Renewal Notes** field on the Benefits Batch record.

You can retrieve the merge document from your Windows Downloads folder. (Once the Email Template is in place, clicking the link will also send the link to the email recipient(s) designated in the Email Template configuration.)

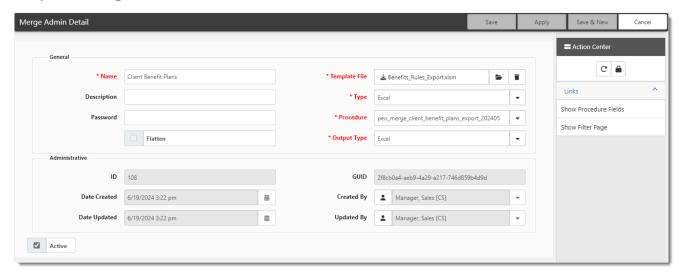
**Note:** The **Current Contribution** and **Renewal Contribution** fields are rounded to 4-digit decimal precision.

## Client Benefit Plans Export

Use the Client Benefit Plans Export merge to export Active Offered Benefit Plans (OBPs) to PrismHR via their built-in import functionality. Plan setup details, rate group tiers, are included in the export.

## Configuration

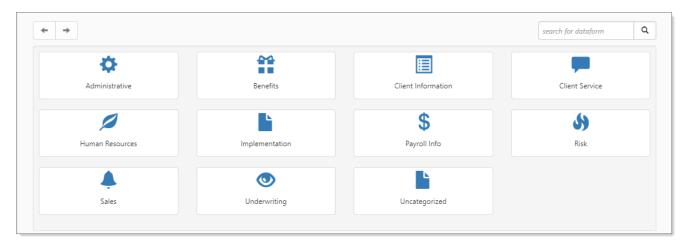
Default configuration on the Merge Admin Detail configuration form is located in **System Admin > Outputs > Merges** in the **Client Benefit Plans** record:



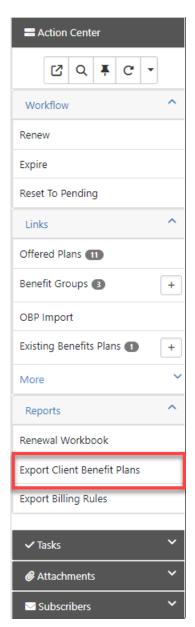
## Running the Merge

#### To run the merge:

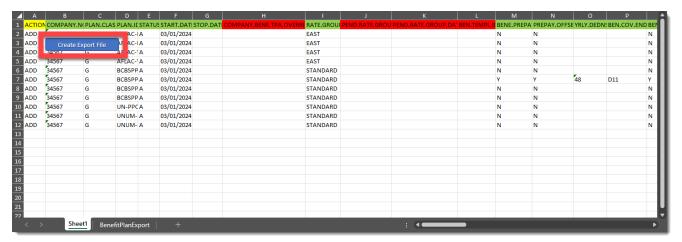
- 1. Open the Benefits Batch where you want to run the merge.
  - a. From the modules bar, click **Q Workspaces**. The Workspace Search dashboard opens.
  - b. Select the desired workspace and click (Open).
     The Workspace page opens.
  - c. Move down the page to the administrative tiles where you see the dataform categories.



- d. Enter "Benefits Batch" in the *search for dataform* field and then click the **Benefits Batch** tile.
  - The Benefits Batch dashboad/search window displays.
- e. Locate the batch and click (Open) next to it.
- 2. In the Action Center, under Reports, click the **Export Client Benefit Plans** link.



- 3. Retrieve the merge document from your Windows Downloads folder.
- 4. Open the file and then click the **Create Export File** button to run the macro.



#### Note:

- This gets the file in the correct format for importing into the PrismHR application.
- If you need assistance importing the data into PrismHR, please refer to the "Importing Company Benefits" topic in the PrismHR application Help.
- The **Premium** and **Contribution** fields are rounded to 4-digit decimal precision.

## How the Client Benefit Plans Export Sets the Rate Group

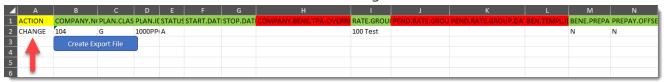
For health plans that use risk tiers, set the **Default Rate Group** for an Offered Benefit Plan from the parent Benefit Plan. Otherwise set the **Default Rate Group** on the Benefits Batch associated with the OBPs. For more information on setting default rate groups, see Setting Default Rate Groups.

Then, when you use the Client Benefit Plans Export, the **Default Rate Group** is referenced to set the **Rate Group** column correctly in the merge for all of the associated Offered Benefit Plans in a batch:

- If the **Rate Source** on the parent Benefit Plan is defined as "Manual", then set the **Rate Group** field for the associated OBPs in the merge to the value in the **Title** field of the Rate Group Detail record.
- If the **Rate Source** on the parent Benefit Plan is defined as "Percentage", then set the **Rate Group** field for the associated OBPs in the merge to the **Default Rate Group** value from the parent Benefit Plan (not the **Default Rate Group** from the Benefits Batch.)
- If no **Default Rate Group** is defined on the parent Benefit Plan, set the **Rate Group** field for the associated OBPs in the merge using the **Default Rate Group** defined on the Benefits Batch, if a value is present.
- If no **Default Rate Group** is defined on either the parent Benefit Plan <u>or</u> the Benefits Batch, set the **Rate Group** on for the associated OBPs in the merge to STANDARD.

## How the Client Benefit Plans Export Handles Replaced Plans

When a Benefit Plan is renewed and the carrier for the current year plan is remaining the same as the prior year plan, the **Action** column in the Client Benefit Plans Export merge file is set to "CHANGE" and the **Start Date** field is left blank so that it remains unchanged in PrismHR.



When the new plan is being replaced with a different plan in the renewal year, the merge file shows two **Action** line items instead of one (as it does for a CHANGE Action). The two **Action** line items are added to reflect addition of the new plan and the termination of the old plan. The following logic is used to determine this:

- If the Carrier Plan Code from the Current Year Plan does not match the Renewed plan, insert an "ADD" **Action** line item in the Client Benefit Plans Export merge file for the Current Year Plan.
- If the Carrier Plan Code from the Current Year Plan does not match the Renewed plan, insert a "TERM" **Action** line item in the Client Benefit Plans Export merge file for the Prior Year Plan.



**Note:** If you need more information on using this import in the PrismHR application, please contact PrismHR Support.

### **Exported Risk Factor Details**

ClientSpace checks for a value entered in the **Risk Factor** field of the OBP and exports the following column values if that field is populated:

- Column I: Rate Group Uses the Benefit Plan Title field value. If there is no rate group this will be set to the **Default Rate Group** value from the Benefits Batch. If that is empty then it will be set to "STANDARD".
- Column AJ: Risk Factor Date Uses the Benefits Batch Effective Date.
- Column AK: Prem.RiskFactor 1 Uses the Risk Factor percentage entered on the OPB dataform.

If the **Risk Factor** field on the OBP is <u>not</u> populated, ClientSpace checks for a value in the **Percentage** field of the Rate Group Detail form and exports the following column values if that field is populated:

- Column I: Rate Group Auto-fills with the text "STANDARD". If there is a **Default Rate Group** on the Benefits Batch this will be inserted instead.
- Column AJ: Risk Factor Date Uses the Benefits Batch Effective Date.
- Column AK: Prem.RiskFactor If the Rate Source is set to "Percentage" on the Rate Group
  detail form and a value is entered in the Percentage field for the form, Percentage value is used.

## **Exported Auto Enrollment Settings**

There is an **Auto Enroll** field in the Setup Details fieldset of the Offered Benefit Plan record. If you set this field to Yes, the offered plan is set up for automatic enrollment upon import into PrismHR. This selection is saved in column BE (BEN.AUTO.ENROLL.DECISION) of the Client Benefit Plans export.

### **Related Topics:**

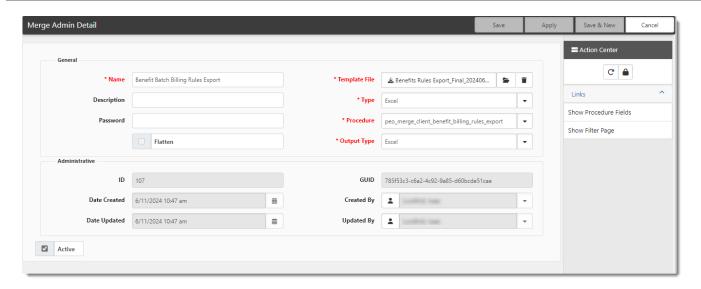
• Setting Default Rate Groups

## Benefit Batch Billing Rules Export

The Benefit Batch Billing Rules Export merge exports billing rules to PrismHR via their built-in import functionality. This includes Offered Benefit Plans and plan pricing details.

## Configuration

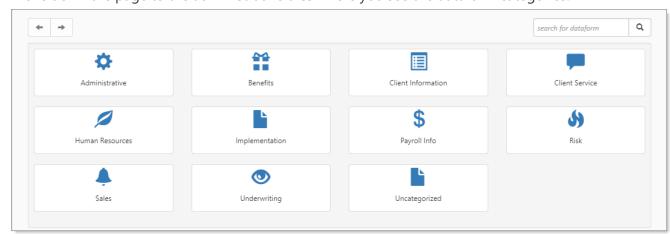
Default configuration on the Merge Admin Detail configuration form is located in **System Admin > Outputs > Merges** in the **Benefit Batch Billing Rules Export** record:



## Running the Merge

### To run the merge:

- 1. Open the Benefits Batch where you want to run the merge.
  - a. From the modules bar, click **Q Workspaces**. The Workspace Search dashboard opens.
  - b. Select the desired workspace and click (Open).
     The Workspace page opens.
  - c. Move down the page to the administrative tiles where you see the dataform categories.



d. Enter "Benefits Batch" in the *search for dataform* field and then click the **Benefits Batch** tile.

The Benefits Batch dashboad/search window displays.

- e. Locate the batch and click (Open) next to it.
- 2. In the Action Center, under Reports, click the **Billing Rules Export** link.



- 3. Retrieve the merge document from your Windows Downloads folder.
- 4. Open the file and then click **Enable Content** to run the macros in this file before exporting to PrismHR.



Note:

- The **Premium** and **Contribution** fields are rounded to 4-digit decimal precision.
- If you need more information on using this import in the PrismHR application, please contact PrismHR Support.

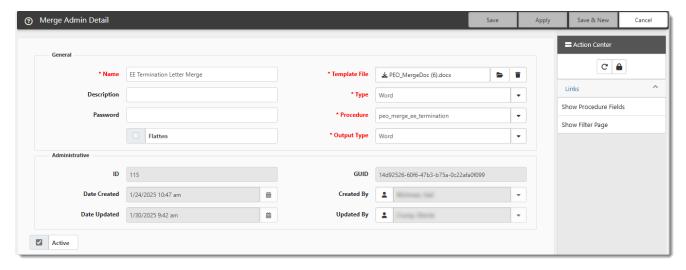
## **Employee Termination Merge**

The Employee Termination Letter Word merge is designed for PEOs to send letters to their client's employees informing them that the PEO is canceling their agreement with them.

**Note:** Currently, to use the Employee Termination Letter merge, you will need to add the merge record and a custom link. (See Merges and Configuring Custom Dataform Links . If you need assistance, please log an Extranet case.) In an upcoming release, we will add a pre-configured merge record and custom link as well as a filter page.

## Configuration

The Employee Termination Letter Word merge uses a stored procedure named **peo\_merge\_ee\_ termination**. The Merge Admin Detail configuration form is located in **System Admin > Outputs > Merges**:



A custom link named **PEO Term Letter** has been configured on the Workspace Landing page in **Action Center** > **Reports** to filter employees and execute the merge.

# Merge Fields

Dataform/Fields	Notes
From Client Master:	
Client Number (ClientNumber)	
PEO ID (PEOID)	
From Organization Detail:	
Name	
DBA (AKA/DBA)	
From Employee:	
Address 1 (Address1)	
Address 2 (Address2)	
Address 1 and 2 (Address1and2)	Address 1 and Address 2 are concatenated. A comma and space are inserted in between Address 1 and Address 2 if Address 2 is not blank/null.
• City	
State	Uses two-letter abbreviation.
Zip Code (ZipCode)	
City, State and Zip (CityStateZip)	City, State, and Zip Code are concatenated. A comma and space are inserted after City.
• County	
Employer ID (Employeeldentifier)	
Employee First Name (EEFirstName)	
Employee Middle Initial (EEMiddleInitial)	
Employee Last Name (EELastName)	
Employee Fule Name (EEFullName)	Employee First Name and Employee Last Name are concatenated.
DOT Employee (luDOTEmployee)	Uses the Decode value from the Lookup.
Salutation (luSalutation)	Uses the Decode value from the Lookup.
Med Card (MedCard)	
Employee Nickname (EENickname)	
• Phone	

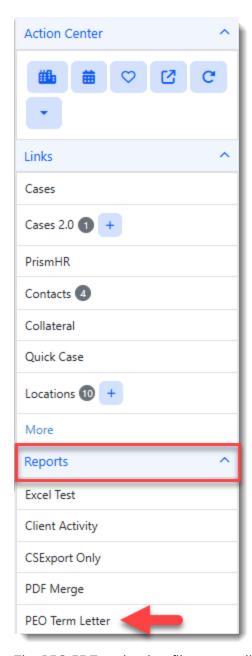
Dataform/Fields	Notes
• Mobile	
• Fax	
• Email	
• W2 Address 1 (W2Address1)	
• W2 Address 2 (W2Address2)	
W2 Address 1 and 2 (W2Address1and2)	W2 Address 1 and W2 Address 2 are concatenated. A comma and space are inserted in between W2 Address 1 and W2 Address 2 if W2 Address 2 is not blank/null.
W2 City (W2City)	
W2 County (W2County)	
• W2 State (W2State)	Uses the two-letter state abbreviation.
W2 Zip Code (W2ZipCode)	
W2 City, State and Zip (W2CityStateZip)	W2 City, W2 State, and W2 Zip Code are concatenated. A comma and space are inserted after W2 City.
From Employee > Employment:	
Employment Status (crEmploymentStatus)	Returns Decode value as EmploymentStatus.
Employment Type (crEmploymentType)	Returns Decode value as EmploymentType.
Hire Date (HireDate)	Format is MM/DD/YYYY.
Home Department (HomeDept)	Uses Decode value.
Job Code (JobCode)	Uses Decode value.
Job Title (JobTitle)	
Last Date Worked (LastDateWorked)	Format is MM/DD/YYYY.
Last Payroll Date (LastPayrollDate)	Format is MM/DD/YYYY.
Last Payroll Update (LastPayrollUpdate)	Format is MM/DD/YYYY.
Client Location ID (fkClientLocationID)	Returns "Location Code - Location Name" as LocationCodeName.
Original Hire Date (OriginalHireDate)	Format is MM/DD/YYYY.

Dataform/Fields	Notes
Pay Frequency (luPayFrequency)	Returns Decode value as PayFrequency.
Pay Method (luPayMethod)	Returns Decode value as PayMethod.
Seniority Date (SeniorityDate)	Format is MM/DD/YYYY.
Employee Shift (luEmpShift)	Returns Decode value as EmpShift.
Standard Hours Per Period (StandardHoursPerPeriod)	
Start Date (StartDate)	Format is MM/DD/YYYY.
StatusChangeDate	Format is MM/DD/YYYY.
luSUTAState	Returns the two-letter state abbreviation as SUTAState.
TerminationDate	Format is MM/DD/YYYY as TermDate.
ReasonforTermination	Returned as TermReason.
WageRate	Rounded to two decimal places with no dollar sign.
WorkersCompCode	Returned as WCCode.
WorkersCompCodeTitle}	Returned as WCCodeTitle.

## Running the Merge

### To run the merge:

- 1. Access the workspace.
  - a. From the modules bar, click **QWorkspaces**. The Workspace Search dashboard opens.
  - b. Type % followed by the Client Number or by the first few letters of the workspace name in the search box to filter the list of workspaces.
    - **Note:** You can also use **More** search to filter the list of Workspaces by fields such as Group, Template, or Create Date range.
  - c. Then, double-click the workspace row in the grid or click (Open) next to the workspace name.
- 2. In the Action Center, under **Reports**, click **PEO Term Letter**.



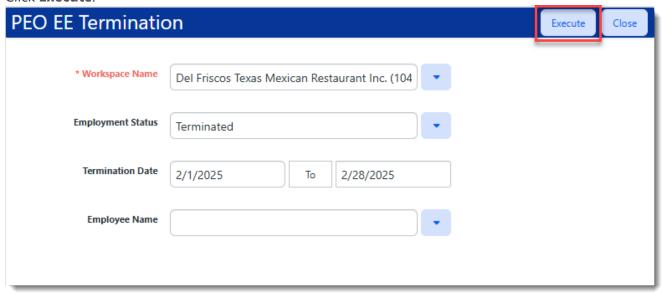
The PEO EE Termination filter page displays.

3. Complete the fields as necessary.

Field	Definition
Workspace Name	Auto-fills with the current workspace name.

Field	Definition
Employment Status	Select Terminated.
Termination Date	To filter for employees terminated within a specific date range, enter the date range.
Employee	To filter for a single employes, select the employee name from the drop down list.

4. Click Execute.



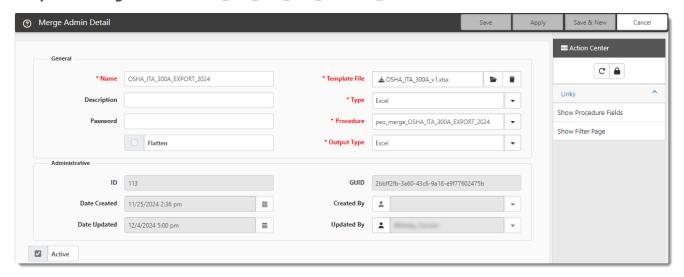
5. Retrieve the merge letters document from your Windows Downloads folder.

# OSHA 300/301 ITA Export Merge

The OSHA 300/301 ITA Export Merge is used to generate a combined OSHA 300/301 report in .XSLX format (which you can then save in .CSV format for OSHA ITA portal submission).

## Configuration

Default configuration on the Merge Admin Detail configuration form is located in **System Admin > Outputs > Merges** in the **OSHA\_ITA\_300\_301\_EXPORT\_2024** record:



## Running the Merge

The merge is set to run yearly using the **Generate OSHA Forms** scheduled process <u>if</u> the **Generate OSHA 300/301 ITA** checkbox on the Client Master is checked. If this field is checked, it adds the merge file as an attachment to the OSHA Forms dataform **OSHA 300/301 ITA** field of each workspace. If the **Generate OSHA 300A ITA** checkbox on the Client Master is <u>not</u> check only the original version of the OSHA 300 report is generated and added to the OSHA Forms dataform.

You can also manually generate the report from the Client Master record of the desired workspace using the steps outlined in these locations:

- The Generating an OSHA 300/301 ITA Export File section of the OSHA 300 Report Details article.
- The Generating an OSHA 300/301 ITA Export File section of the OSHA 301 Report Details article.

### **Related Topics:**

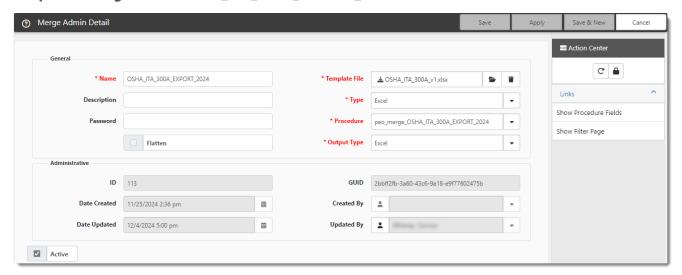
- OSHA 300A Report Details
- OSHA 300 Report Details
- OSHA 300 and 300A Mass Creation
- OSHA 300A ITA Export Merge

## OSHA 300A ITA Export Merge

The OSHA 300A ITA Export Merge is used to generate the OSHA 300A report in .XSLX format (which you can then save in .CSV format for OSHA ITA portal submission).

## Configuration

Default configuration on the Merge Admin Detail configuration form is located in **System Admin > Outputs > Merges** in the **OSHA\_ITA\_300A\_EXPORT\_2024** record:



## Running the Merge

The merge is set to run yearly using the **Generate OSHA Forms** scheduled process <u>if</u> the **Generate OSHA 300A ITA** checkbox on the Client Master is checked. If this field is checked, it adds the merge file as an attachment to the OSHA Forms dataform **OSHA 300A ITA** field of each workspace. If the **Generate OSHA 300A ITA** checkbox on the Client Master is <u>not</u> checked, only the only the original version of the OSHA 300A report is generated and added to the OSHA Forms dataform.

You can also manually generate the report from the Client Master record of the desired workspace using the steps outlined in the Generating an OSHA 300A ITA Export File section of the OSHA 300A Report Details topic.

## **Related Topics:**

- OSHA 300A Report Details
- OSHA 300 Report Details
- OSHA 300 and 300A Mass Creation
- OSHA 300/301 ITA Export Merge

# Chapter 19

# 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**

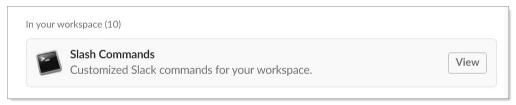
A Slack administrator will have the ability within Slack to Browse and Add new apps to the Slack install. This normally appears at the bottom of the Slack user list.

### To configure Slack:

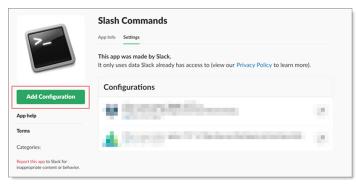
- 1. Open Slack.
- 2. Select Apps.

The Browse Apps page opens.

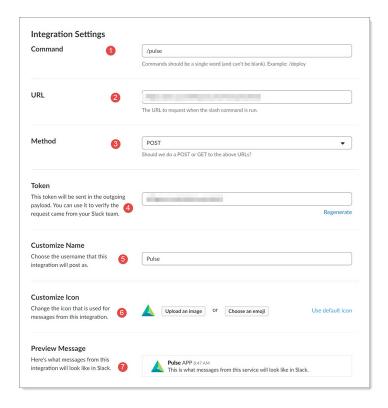
3. If not installed, install the **Slash Commands** app.



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

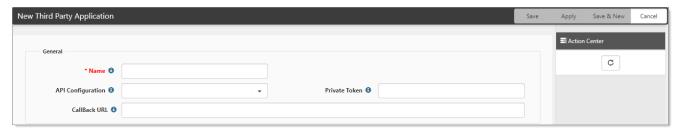
The next part of the Slack configuration is to configure ClientSpace. The application configuration consists of two parts:

- The Third Party Application (TPA) configuration
- The user configuration.

### To begin:

- 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 20

# **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.

# **Supported Integrations**

Some of the ClientSpace APIs include:

- **PrismHR** is communication between ClientSpace and the PrismHR payroll system for Client and Employee data. See PrismHR API.
- **Benefit Plan API** is a one-way export API that allows you to export benefit plan setup information from ClientSpace to PrismHR. Once this information is in PrismHR, you can enroll employees and manage the plans in PrismHR. See Benefit Plan 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.
- **Gradient AI Health Benefits** uses artificial intelligence to analyze your offered benefits plans and compare them to potentially thousands of other offered benefits plans submitted by other PEOs in your area. If you are a small to mid-size PEO and you do not have an on-site benefits

expert, a Gradient AI Health Benefits analysis can provide insight into how your pricing stacks up against others to help you to determine if you are pricing benefits properly. See Gradient AI Health Benefits.

- **Gradient AI Risk** uses artificial intelligence to analyze Pricing Console batch information such as payroll, headcount, workers compensation position codes, and worker's compensation loss history (if available). Data from the submitted Pricing Console batch is processed by Gradient AI in real time and results are aggregated by each worker's compensation policy included in the batch. The results include information such as predicted losses and a suggested premium (i.e., Target Premium). See Gradient AI Risk.
- SIDES ClientSpace integration is an automated data exchange interface between ClientSpace and SIDES and is best suited for larger employers, PEOs, and TPAs who typically deal with more than 30 UI information requests per week or who operate in multiple states. ClientSpace retrieves the claims from SIDES and places them in the correct workspace. See SIDES ClientSpace Integration Overview.

If you have questions about API availability and upcoming projects, please log an Extranet case.

# **Unsupported Integrations**

- Act-On
- ZoomInfo

**Note:** While Act-On and ZoomInfo are unsupported marketing platforms, we do offer a Marketo integration which is also a marketing platform. It can create Organizations, Contacts, and Activities in ClientSpace. Please see Marketo for details.

# 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, HRPAPI\_emp\_benefits, HRPAPI\_initial\_codes\_skill, HRPAPI\_ongoing\_code\_skill). 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 <b>Employee</b> > <b>Name</b> > <b>FLSA Exempt</b> field in PrismHR.
Is FICA Exempt?	Yes/No lookup. Imports this flag from the <b>Employee</b> > <b>Tax FICA Exempt</b> 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	<ul> <li>ADD: Accidental Death and Dismemberment</li> </ul>	ACC: Accident Benefits
VIS: Vision	LIS: Life Insurance - Basic - Spouse Only	LDA: Additional
DEN: Dental	<ul> <li>LIC: Life Insurance - Basic - Child Only</li> </ul>	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	

#### **Employee Benefits Fields Affected by Termination**

When an employee is terminated in PrismHR, the PrismHR API import process marks the **Employment Status** field to **T** (Terminated) in ClientSpace. This affects the values in the **Employee Benefits** fields.

- If the **Preserve Benefits Data** rule is not active (which is the default state for the rule), the import process clears the values in the **Employee Benefits** fields.
- If an admin user sets the **Preserve Benefits Data** rule to **Active**, the values in the **Employee Benefits** fields are preserved during the import process.

By using the **Preserve Benefits Data** rule to preserve the values in the **Employee Benefits** fields, the enrolled benefits information can be used in any necessary employee termination notifications.

#### **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

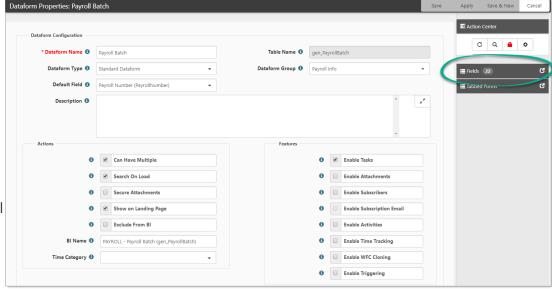
You can import payroll batch data from PrismHR into ClientSpace for reporting. The imported data resides in the following dataforms:

- · 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

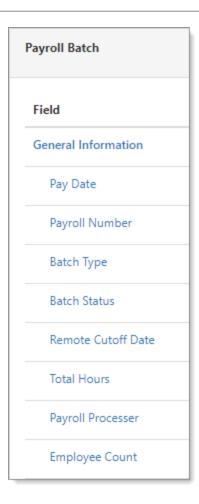
All the fields on the Payroll Batch dataform are read-only and populate through the PrismHR API Import. By default, the form is secured with View rights for all users in the PEO Employees role. The Payroll Processor field is



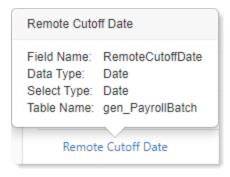
set using a business rule that finds the Client Team form associated with the workspace and copies the Payroll Processor field information from the Client Team form into the Payroll Processor field on the Payroll Batch form. The business rule is triggered when records are inserted either through a normal dataform save or from an import. The Payroll Batch dataform is a parent to the Billing Voucher dataform.

#### To view the Payroll Batch dataform:

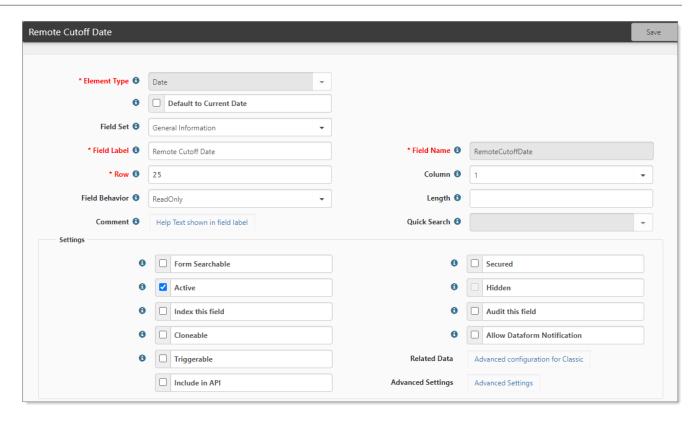
- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Select Payroll Batch and click (Open).
   The Dataform Properties: Payroll Batch form opens.
- To view fields, in the Action Center, click Fields.
   The Payroll Batch fields list displays.



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. The PrismHR Import Payroll Batch process uses two separate but related scheduled processes to import and process payroll details, billing vouchers, and pay groups from PrismHR. This breakout was done to prevent system performance issues that could arise when large payroll batches are processed.

We retrieve the batch status from Prism.

- If the batch is not Complete in Prism, we do not process it. The batch status remains in the status it is in (Pending, Reporting, etc.)
- If the batch is Complete in Prism, that signals ClientSpace to place a check mark in the Sync with PrismHR checkbox on the Payroll batch record which triggers the Prism Import Payroll Batch Sync scheduled process (described below) to run at the appropriate time.

The two scheduled processes are:

- **PrismHR Import Payroll Batch Ongoing:** Runs first to process basic payroll information.
- PrismHR Import Payroll Batch Sync: If the Sync with PrismHR checkbox is checked, the Prism
  Import Payroll Batch Sync process runs and billing vouchers, pay groups, and costs based on
  employee count information are processed. This process is set by default to only run on
  weekends.

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 client approval	Payment pending	Time sheet entry in progress
Payroll is ready for time sheet entry	Payroll is complete	Payroll is ready to print
Payroll is ready to calculate	Payroll finalization in progress	Payroll finalization complete with errors
Wire transfer pending	Payroll calculation completed with errors	Finalization pending approval
	Payroll reports are ready for review	Payroll is ready to ship

Payroll Batch processing handles failed or deleted payroll batches in PrismHR.

- Payroll Batch DELETE events are processed to create Import Queue records.
- A DELETE event triggers business logic that updates the Batch Status field on the Payroll Batch form to "Deleted" and deactivates the Payroll Batch record along with the associated Pay Groups and Billing Vouchers
- When a payroll batch record does not have a payDate value, the system marks the record as Completed with the message: "Pay date is required to import payroll batches into ClientSpace"
- 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"
- If no billing vouchers are found for a Payroll Batch from the PrismHR Import Payroll Batch
  Complete scheduled event, the system marks the record as Completed (as there is no data to
  process) and creates a log entry that indicates that no vouchers were found. For example:
   No billing vouchers found for client ID "<api:clientId>" and batch ID "<api:batchId>.

#### 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.

#### **Deleted batches**

For deleted batches, ClientSpace deactivates the Payroll Batch as well as the associated pay groups and billing vouchers by removing the check marks from the **Active** checkboxes on these forms.

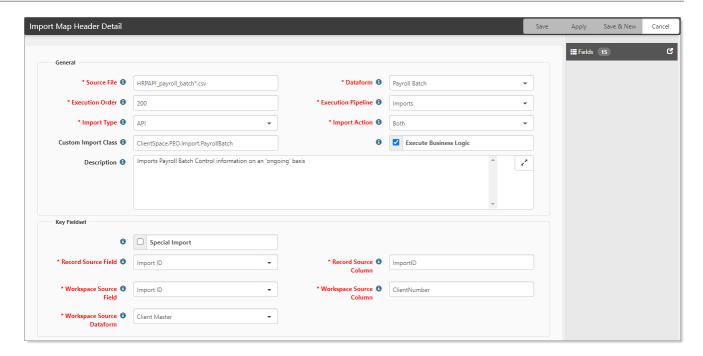
Additionally, ClientSpace updates the **Batch Status** field on the Payroll Batch form to "Deleted".

#### **Payroll Batch Import Mappings**

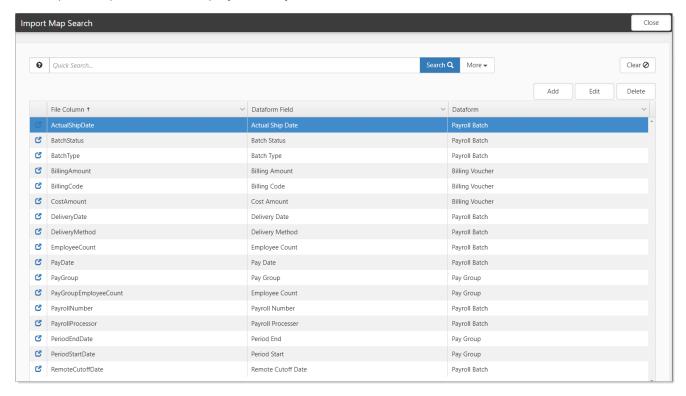
The following procedure provides details for viewing the Payroll Batch mapping.

#### To view the mappings:

- Go to System Admin > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- Locate HRPAPI\_payroll\_batch\*.csv and click (Open) to open the header detail.
   The Import Map Header Detail form opens.



To view the fields, click **Fields**.
 The Import Map Search list displays the Payroll Batch fields.



Available fields are Actual Ship Date, Batch Status, Batch Type, Billing Amount, Billing Code, Cost Amount, Delivery Date, Delivery Method, Employee Count, Pay Date, Pay Group, Employee Count, Payroll Number, Payroll Processor, Period End, Period Start, and Remote Cuttoff Date.

Remote Cutoff Date is the deadline for reporting payroll and helps the payroll processor monitor the client payroll reporting status. Remote Cutoff Date is only populated when the API Config parameter **GetPayrollBatchCutoffDate** is set to **1**. Additionally, you **must** also be on the API version 1.22 or higher. For more information, see Ongoing Imports: Configuring the API for Import Map Details.

4. To view a field and its properties, select and click (Open).

#### Payroll Batch, Pay Group, and Billing Vouchers

**Note:** Payroll Batch processing uses the **PrismHR API** and scheduled process: **PrismHR Import Payroll Batch Ongoing** and **PrismHR Import Payroll Batch Complete**. Also see Configuring the Payroll Batch Scheduled Processes.

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 depends 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. The system uses the Set Payroll Frequency custom logic rule to set the Payroll Frequency on a pay group.
- **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.

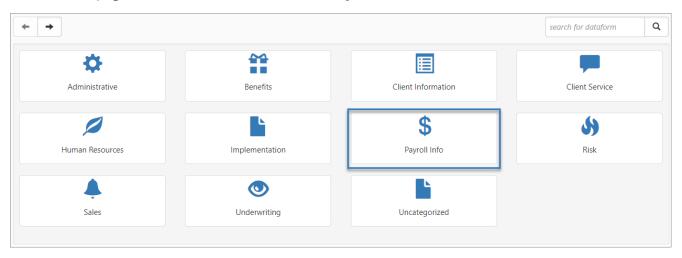
Let's look at an example of a Payroll Batch, Pay Group, and Billing Vouchers.

#### To view the configuration:

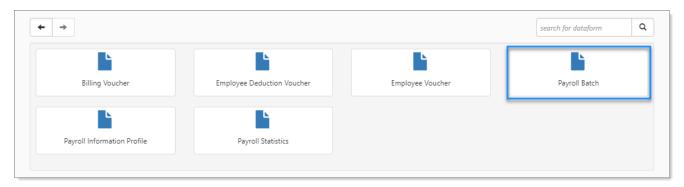
- On the module bar, click Workspaces.
   The Workspace Search dashboard opens.
- 2. Select a workspace and click (Jump).

The Workspace opens.

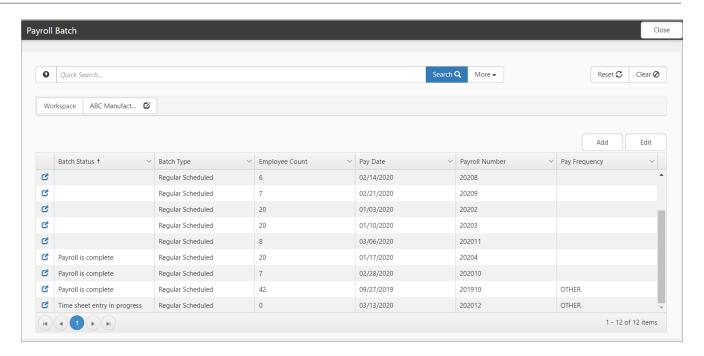
3. Move down the page to the dataform tiles, and click **Payroll Info**.



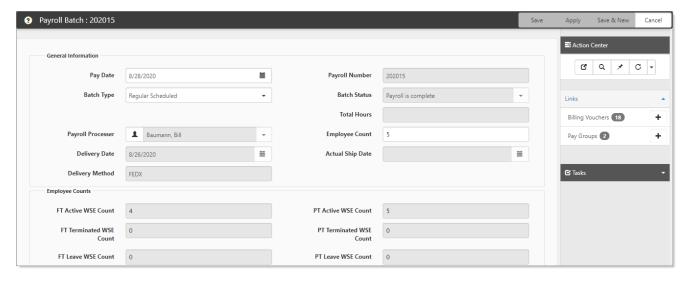
4. Click the Payroll Batch tile.



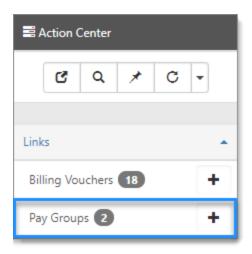
The Payroll Batch dashboard opens.



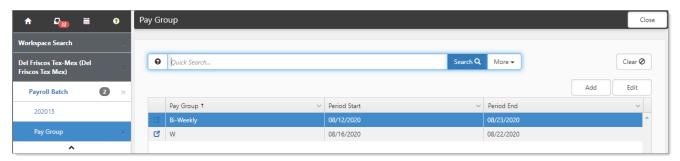
5. Open an entry.
In our example, we selected an entry with multiple Pay Groups.



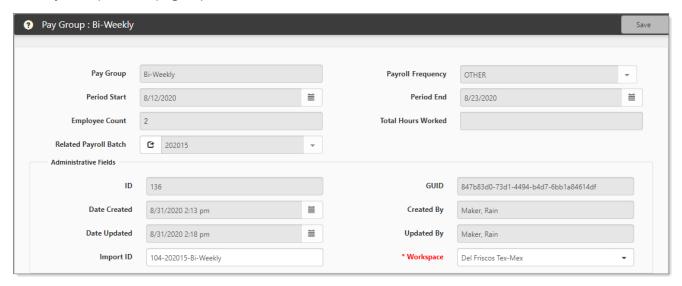
6. In the Action Center, click Pay Groups.



The Pay Group dashboard opens. Our example shows two entries: Bi-Weekly and W. These pay groups are imported from PrismHR into ClientSpace.



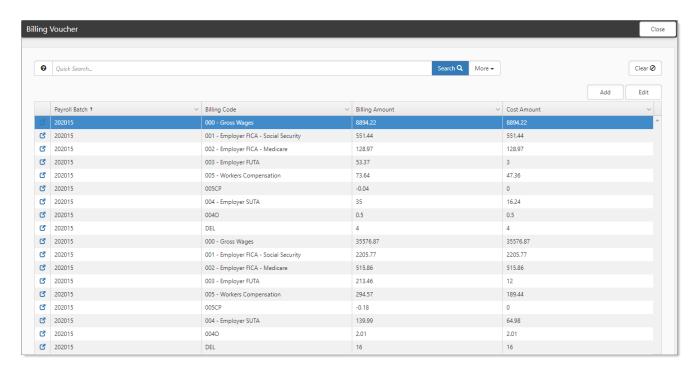
7. To view a Pay Group, highlight a row and double-click or click (Open). The Pay Group details page opens.



#### To view Billing Vouchers from the Payroll Batch:

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.



#### 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.

illing Voucher	
Field	Name
Billing Code	luBillingCode
Billing Amount	BillingAmount
Cost Amount	CostAmount
Payroll Batch	fkPayrollBatchID

#### Configuring the Payroll Batch Scheduled Processes

The PrismHR Import Payroll Batch process uses two separate but related scheduled processes to import and process payroll details, billing vouchers, and pay groups from PrismHR. This breakout was done to prevent system performance issues that could arise when large payroll batches are processed.

We retrieve the batch status from Prism.

- If the batch is not Complete in Prism, we do not process it. The batch status remains in the status it is in (Pending, Reporting, etc.)
- If the batch is Complete in Prism, that signals ClientSpace to place a check mark in the Sync with PrismHR checkbox on the Payroll batch record which triggers the Prism Import Payroll Batch Sync scheduled process (described below) to run at the appropriate time.

The two scheduled processes are:

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- PrismHR Import Payroll Batch Sync: If the Sync with PrismHR checkbox is checked, the Prism
  Import Payroll Batch Sync process runs and billing vouchers, pay groups, and costs based on
  employee count information are processed. This process is set by default to only run on
  weekends.

#### Note:

- Both the **PrismHR Import Payroll Batch Ongoing** and **PrismHR Import Payroll Batch Sync** scheduled processes are Active by default.
- Both the **PrismHR Import Payroll Batch Ongoing** and **PrismHR Import Payroll Batch Sync** scheduled processes have a default limit of 250 payroll batch records that may be returned for

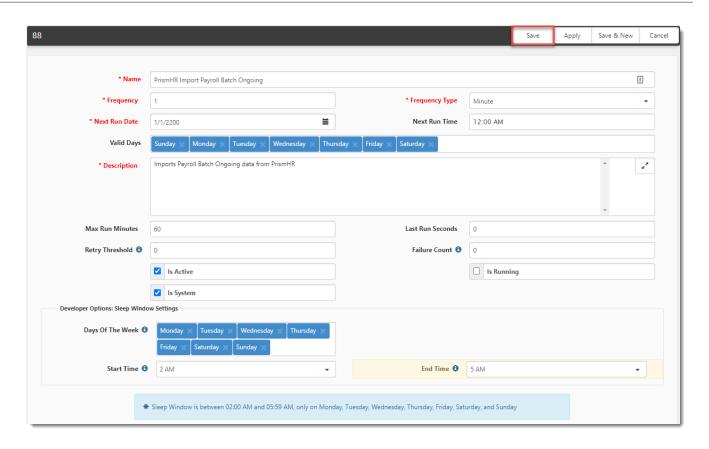
processing at one time. The **BillingBatchCount** parameter for the PrismHR Import Payroll Batch Complete scheduled process is editable in the PrismHR API configuration Additional Parameters.

#### To edit the PrismHR Import Payroll Batch Ongoing scheduled process default settings:

- Go to System Admin > Advanced > Scheduled Processes.
   The Scheduled Processes Admin dashboard opens.
- Click Jump to open PrismHR Import Payroll Batch Ongoing.
  The form opens.
- 3. Determine the frequency of when to run the process and complete the following settings.

Frequency	Specify how often to run this process. This is a numeric field. The default setting is 1 minute. This means that the process will poll the system every minute until it finds records to process.
Frequency Type	Select a type: Daily, Hourly, Minute, Monthly, Weekly, Yearly. The default setting is Minute.
Next Run Date	Use the date picker to select the next run date.
Next Run Time	Specify the time of day. The default setting is 12:00 a.m.
Valid Days	Select valid day(s) of the week for the process to run. The default days all days of the week.
Max Run Minutes	Specify how long this process can run. The default setting is 60 minutes.
Sleep Window Settings	Specify the time frames when the process should <u>not</u> execute. The default days are all days of the week between the <b>Start Time</b> of 2 AM and <b>End Time</b> of 5 AM.

- 4. **Is Active** is checked by default. If you do <u>not</u> want this scheduled process to run, uncheck (i.e., clear) the **Is Active** checkbox.
- 5. **Is System** is checked by default. Only a developer or other user with special access can delete a scheduled process flagged as **Is System**.
- 6. Click Save.



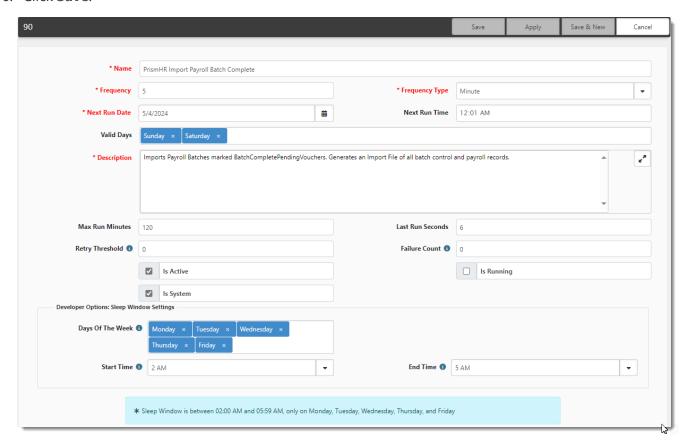
## To edit the PrismHR Import Payroll Batch Sync scheduled process default settings:

- Go to System Admin → > Advanced > Scheduled Processes.
   The Scheduled Processes Admin dashboard opens.
- Click Jump to open PrismHR Import Payroll Batch Sync. The form opens.
- 3. Determine the frequency of when to run the process and complete the following settings.

Frequency	Specify how often to run this process. This is a numeric field. The default setting is 5 minutes. This means that the process will poll the system every 5 minutes until it finds records to process.
Frequency Type	Select a type: Daily, Hourly, Minute, Monthly, Weekly, Yearly. The default setting is Minute.
Next Run Date	Use the date picker to select the next run date. (Initially this is set for you.)

Next Run Time	Specify the time of day. The default setting is 8:00 PM.
Valid Days	Select valid day(s) of the week for the process to run. The default days are Saturday and Sunday.
Max Run Minutes	Specify how long this process can run. The default setting is 120 minutes.
Sleep Window Settings	Specify the time frames when the process should <u>not</u> execute. The default days are Monday, Tuesday, Wednesday, Thursday, and Friday between the <b>Start Time</b> of 2 AM and <b>End Time</b> of 7 PM.

- 4. **Is Active** is checked by default. If you do <u>not</u> want this scheduled process to run, uncheck (i.e., clear) the **Is Active** checkbox.
- 5. **Is System** is checked by default. Only a developer or other user with special access can delete a scheduled process flagged as **Is System**.
- 6. Click Save.



## **Related Topics:**

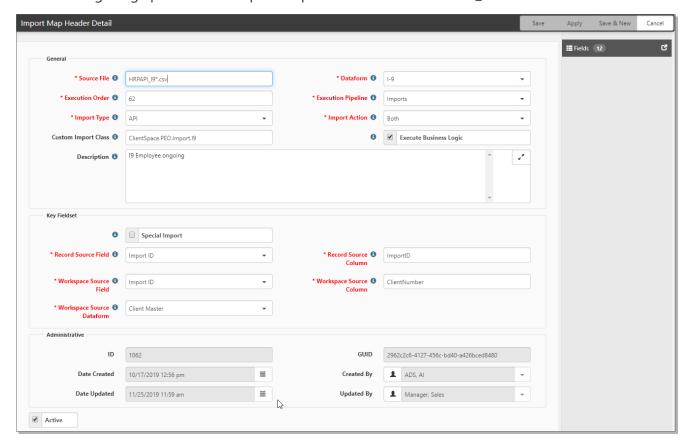
• Scheduled Processes

## I-9 HRPAPI Import Mappings

The following procedures provide details for viewing mappings as well as the dataform properties.

### To view the mappings:

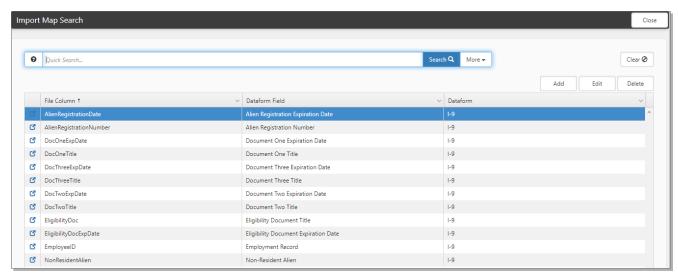
- Go to System Admin → > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- Locate HRPAPI\_I9\*.csv and click (Jump) to open the header detail.
   The Import Map Header Detail form opens.
   The following image presents the Import Map Header Detail for HRPAPI\_I9\*.csv.



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:

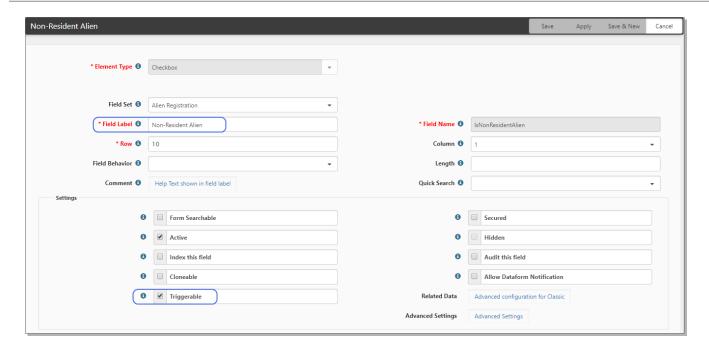
- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Locate I-9 and click (Jump).
   The Dataform Properties for I-9 opens.
- 3. To view the fields, in the **Action Center**, click **Fields**.
  - The I-9 Dataform fields display.

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.

9	
Field	Name
Employment Record	fkEmploymentRecordID
I-9 Form	19Form
Status	luStatus
Purge Date	PurgeDate
Reverify Employee	IuReverificationRehires
Reverification & Rehires	fsReverificationRehires
Reverification Method	luReverificationMethod
Reverification Date	ReverificationDate
Reason For Reverification	IuReasonForReverification
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.
- 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\_19** 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

**Note:** I-9 inserts and updates are covered by this import configuration.

# **Employee Benefits HRPAPI Import Mappings**

The following procedures provide details for viewing:

- Employee Benefits HRPAPI mappings for the PrismHR API Employee Benefits import.
- Dataform properties for the Employee Benefits Detail form.

**Note:** The Employee Benefits Detail form is where imported employee benefits information is stored. When the PrismHR API import runs, if a record for the plan does not exist, a new Employee Benefits Detail record is created for each plan that an employee is enrolled in and attached to the Employee record. If an Employee Benefits Detail record exists but has changed, it is updated.

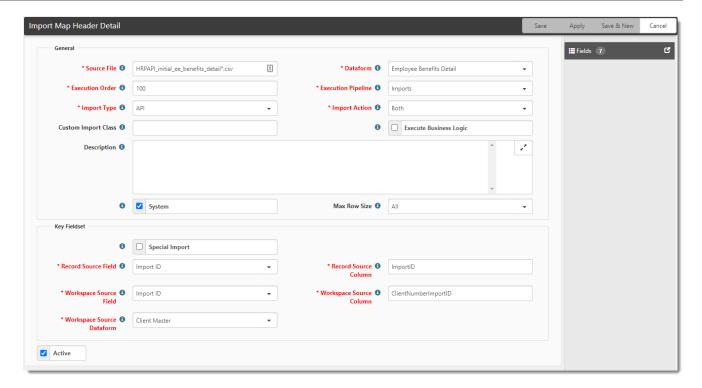
#### **Import Mappings**

#### To view the mappings:

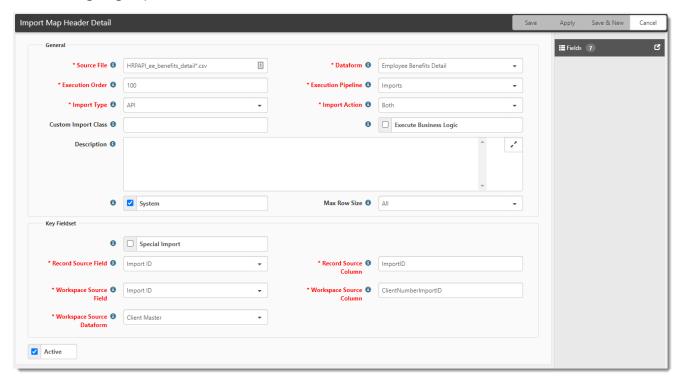
- Go to System Admin > Advanced > Configure Import.
   The Import Map Header Search dashboard opens. There are two Employee Benefits HRPAPI mappings:
  - HRPAPI\_initial\_ee\_benefits\_detail\*.csv
  - HRPAPI\_ee\_benefits\_detail\*.csv
- 2. Locate each mapping and click (Jump) to open the header detail.

The Import Map Header Detail form opens.

The following image represents the Import Map Header Detail for **HRPAPI\_initial\_ee\_benefits\_detail\*.csv** used for the initial import:



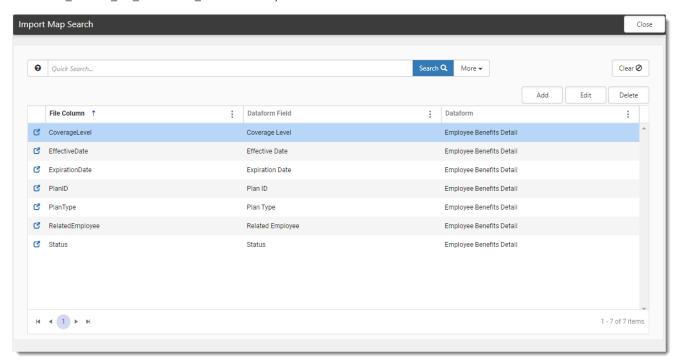
The following image represents the Import Map Header Detail for **HRPAPI\_ee\_benefits\_detail\*.csv** used for ongoing imports.



3. To view the fields, click **Fields**.

The Import Map Search list displays the Employee Benefits Detail dataform fields.

The following image lists the **HRPAPI\_ee\_benefits\_detail\*.csv** fields. (The fields are the same for **HRPAPI initial ee benefits detail\*.csv**.)

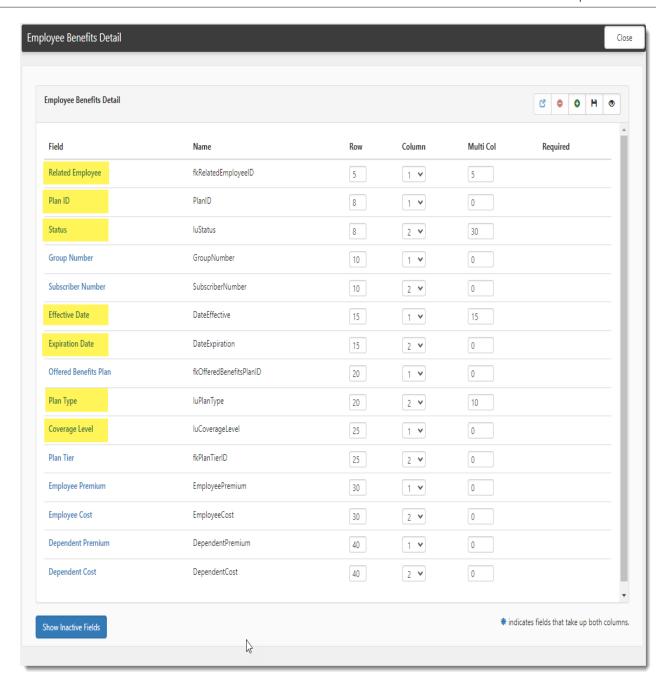


#### **Dataform Properties**

#### To view the Skill Code Dataform properties:

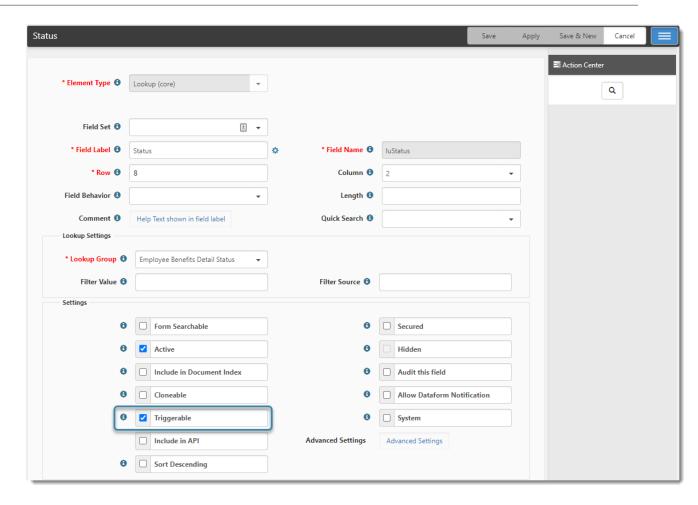
- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Locate Employee Benefits Detail and click (Jump).
   The Dataform Properties: Employee Benefits Details window opens.
- 3. To view the fields, in the **Action Center**, click **Fields**. The Employee Benefits Detail Dataform fields display.

The Employee Benefits Detail Dataform fields related to the Employee Benefits import mappings (HRPAPI\_ee\_benefits\_detail\*.csv and HRPAPI\_initial\_ee\_benefits\_detail\*.csv) are Related Employee, Plan ID, Status, Effective Date, Expiration Date, Plan Type, and Coverage Level.



4. To view field details, double-click the field or select the field and then click (Jump). Field configuration details display.

The following image shows the **Status** lookup field details.



#### Can Use in Workflows

With the ClientSpace PrismHR HRPAPI, you can import Employee Benefits data into the Employee Benefit Details dataform and then use the dataform in workflows. The import uses **HRPAPI\_ee\_** benefits\_detail\*.csv and **HRPAPI\_initial\_ee\_benefits\_detail\*.csv** import mappings.

Any dataform field that is marked as **Triggerable** on the Dataform Properties window can be used in a workflow. The image above from the preceding section shows the **Status** lookup field flagged as **Triggerable**.

See Adding Dataform Fields.

## ClientSpace to PrismHR Field Mapping

The table below lists Employee Benefits Detail dataform import fields in ClientSpace and the path to the corresponding fields in PrismHR.

ClientSpace "Import To" Field Name	PrismHR "Import From" Path and Field Name
Related Employee (fkRelatedEmployeeID)	getEnrollInputList
Status (luStatus)	benefitPlanDetail/status
Effective Date (DateEffective)	benefitPlan/planDetail/effectiveDate
Expiration Date (DateExpiration)	benefitPlanDetail/stopDate
Offered Benefits Plan (fkOfferedBenefitsPlanID)	benefitPlanDetail/planId
Plan Type (luPlanType)	benefitPlan/planDetail/planType
Coverage Level (luCoverageLevel)	benefitPlan/planDetail/coverage

# Employee Skills and Skill Codes HRPAPI Import Mappings

The PrismHR API can import employee skill data from PrismHR when the PrismHR Import Initial and PrismHR Import Ongoing scheduled processes run. This information comes from the **Skills & Education** tab of the Employee record in PrismHR.

The following procedures provide details for viewing the import mappings and dataform properties used to configure the import:

- An employee Skill Code HRPAPI mapping for the PrismHR API Skill Codes import.
- Employee Skills HRPAPI mappings for the PrismHR API Employee Skill import.
- Dataform properties for the Skill Codes dataform.
- Dataform properties for the Employee Skill dataform.

**Note:** The Skill Codes and Employee Skill dataforms are where imported employee skill code and employee skills information is stored.

## **Import Mappings**

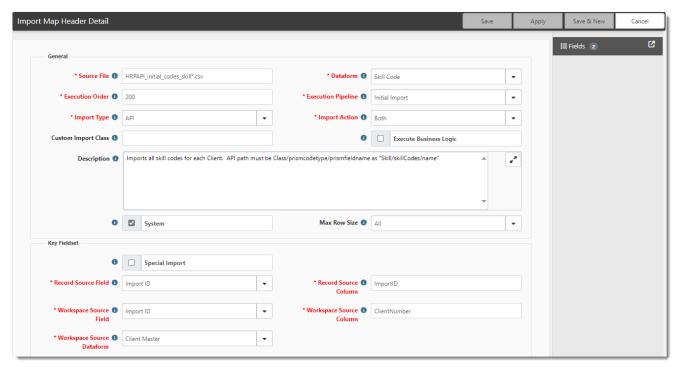
#### To view the mappings:

1. Go to **System Admin**  → **Advanced** → **Configure Import**.

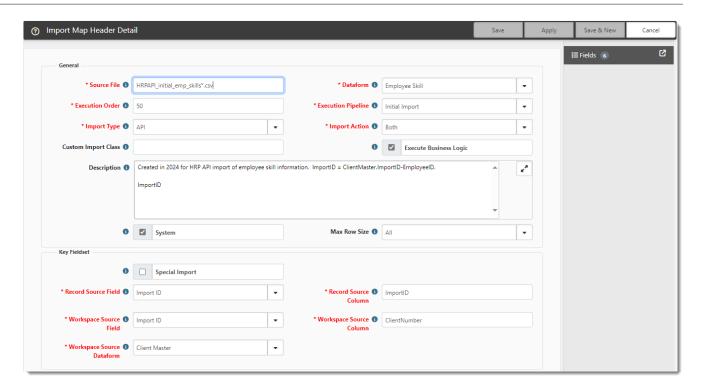
The Import Map Header Search dashboard opens. There is an Employee Skill Code mapping and two Employee Skill HRPAPI mappings:

- HRPAPI\_initial\_codes\_skill\*.csv
- HRPAPI\_initial\_emp\_skills
- HRPAPI\_ongoing\_emp\_skills

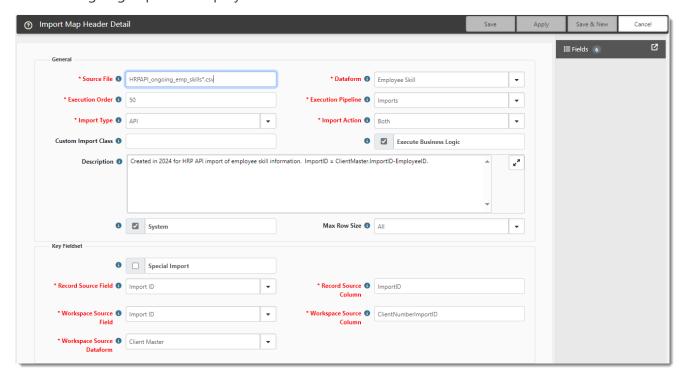
- 2. Locate each mapping. Search for **Dataform** = Skill Code to locate the Employee Skill Code import mapping. Search for **Dataform** = Employee Skill to locate the Employee Skills import mappings.
- 3. Click (Jump) to open a header detail record. The Import Map Header Detail form opens.
  - The following image represents the Import Map Header Detail for **HRPAPI\_initial\_codes\_skill\*.csv** used for the initial import of skill codes:



The following image represents the Import Map Header Detail for **HRPAPI\_initial\_emp\_skills** used for initial import of employee skills.

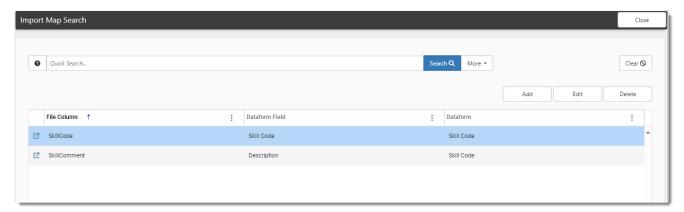


The following image represents the Import Map Header Detail for **HRPAPI\_ongoing\_emp\_skills** used for ongoing import of employee skills.

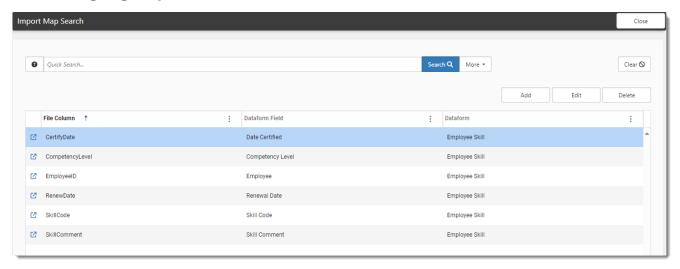


4. To view the fields, click Fields.

The Import Map Search list displays the Employee Skills fields (SkillCode and SkillComment). The following image lists the **HRPAPI\_initial\_codes\_skill\*.csv** fields.



The following image lists the **HRPAPI\_initial\_emp\_skills\*.csv** fields. (The fields are the same for **HRPAPI\_ongoing\_emp\_skills\*.csv**.)

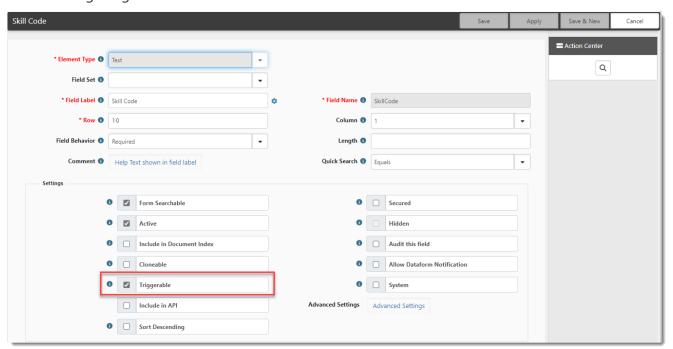


## **Dataform Properties**

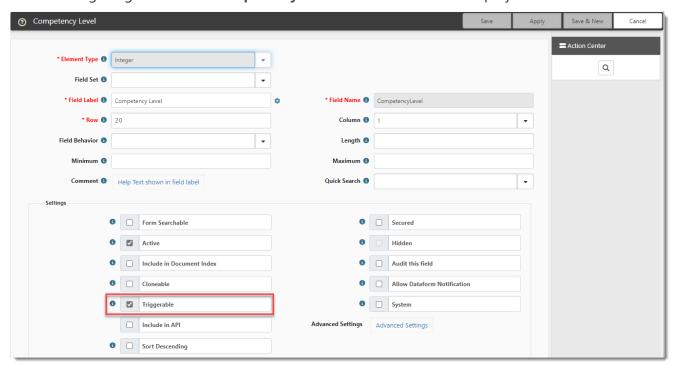
To view the Skill Codes and Employee Skill Dataform properties:

- Go to System Admin > Advanced > Dataform Admin.
   The Dataform Admin dashboard opens.
- Locate Skill Code and click (Jump).
   The Dataform Properties: Skill Code window opens.
- Locate Employee Skill and click (Jump).
   The Dataform Properties: Employee Skill window opens.
- 4. To view the fields, in the **Action Center**, click **Fields**.

The following image shows the **Skill Code** field details on the Skill Code form.



The following image shows the **Competency Level** field details on the Employee Skill form.



#### Can Use in Workflows

With the ClientSpace PrismHR HRPAPI, you can import Employee Skills data from the **Skills & Education** tab of the Employee record in the PrismHR application and then create workflows in ClientSpace. For instance, you can trigger notifications to follow up when an employee's certification date (**Date Certified**) is nearing expiration for a particular skill code (**Skill Code**) where active certification must be strictly maintained.

Any dataform field that is marked as **Triggerable** on the Dataform Properties window can be used in a workflow. The images above from the preceding section show the **Skill Code** field from the Skill Code dataform and the **Competency Level** field from the Employee Skill dataform flagged as **Triggerable**.

See Adding Dataform Fields.

# 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

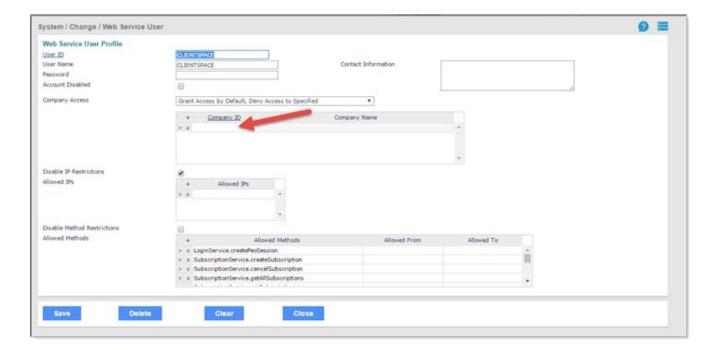
### Web services company restricted list

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:

- Go to System > System Parameters > Action Menu > Web Service User and open the CLIENTSPACE user.
- 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.



#### **Initial 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 import 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)	Gender (Employee)
Contract Status (ClientMaster)	Ethnic Classification (Employee)
HR Rep User	Work State Filing Status (Employee)
Sales Rep User	Home State Filing Status (Employee)
Employment Status (Employee)	Pay Method (Employment)
Employment Type (Employee)	Pay Frequency (Employment)
Marital Status (Employee)	

#### 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

<sup>\*\*</sup>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.

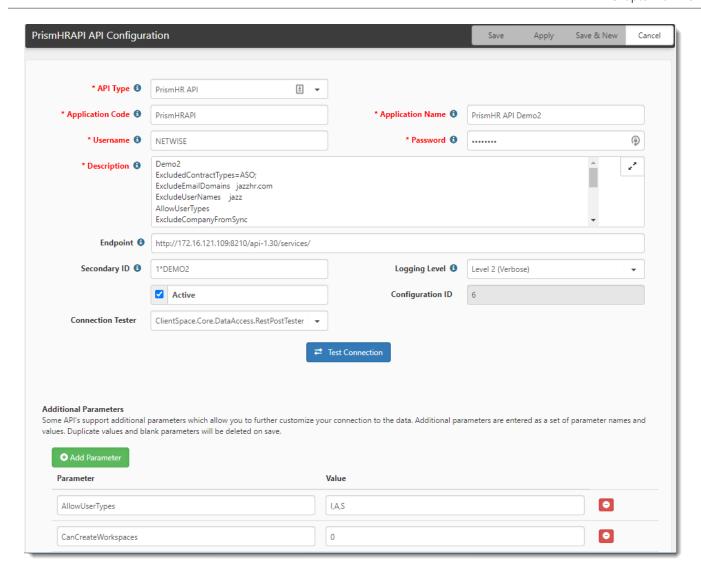
#### **PrismHR API - USERS**

When processing User Import Queue records, if the email address is incorrectly formatted or there is no email address, the system marks the record as **Requires Attention** and adds a message to the Import Queue Log Data. The message follows this format: "User '<username>' invalid or missing email address <invalid email>, queue record set to Requires Attention".

For example, if the email address for the user **carlos** was **carlos@gmail**, the system would evaluate the email address as incomplete (since the email address was missing .com from the end) and add the message "User carlos invalid or missing email address carlos@gmail, queue record set to Requires Attention." to the import queue log.

## Initial Import: 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:

- 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**.

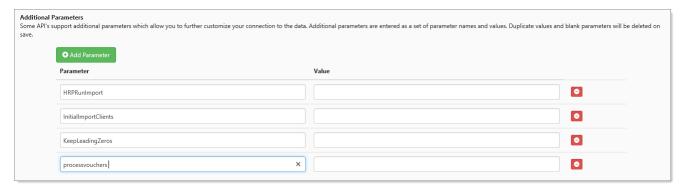
  The API Configuration form opens. The API Configuration form has an API Configuration fieldset that contains the information necessary to connect to the specific PrismHR installation for the Client. The example shows test data. Use actual client data when configuring.

API Type	Select <b>PrismHR API</b> .	
----------	-----------------------------	--

Application Code	Use a unique value to denote the PrismHR installation, such as <b>PrismHRAPI</b> .
Application Name	A description that displays in the ClientSpace lists. Use something to indicate the installation, such as <b>PrismHR API</b> .
Username	The username registered with the PrismHR API for this site.
Password	The password that is associated with the PrismHR Account Username for this site.
Description	Provide a description.
Endpoint	A formatted URL pointing to the API services for the specific PrismHR client and site (must include the trailing / character).
	For the <b>GetPayrollBatchCutoffDate</b> parameter, specify version 1.22 or higher of the PrismHR API. <b>Note</b> : Failure to update the version in the API Endpoint config results in the following error in the API log: Error Processing Batch Control Info '202023.104', error=Unexpected character encountered while parsing value: }. Path 'PayrollBatchWithOptionsResponse', line 1, position 35., queue record will be in Pending status.
Secondary ID	An identifier that is used to enable the monitoring of all PrismHR clients at an installation.
Logging Level	<ul> <li>The PrismHR Export process for Company Information and Employee/Employment information contains important log information to monitor the export activity from ClientSpace to PrismHR.</li> <li>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 PrismHR API call and ClientSpace action (up to the Import Phase). Errors and Information entries are created.</li> <li>When set to Level 1, only ERRORS are logged to the Scheduled Process History Table.</li> <li>When set to Level 0 (None), No log data is produced.</li> </ul>
Active	When this option is selected, the configuration is active (enabled).

## **To configure Additional Parameters:**

This is where you specify a set of name-value pairs to configure the process.



### 1. Click Add Parameter.

A new row opens.

2. Select from the following list to add parameters.

Parameter	Value settings
AllowUserTypes	<ul> <li>Defines the types of users included in a user import:</li> <li>I: Internal User. Someone who works for the PEO or someone at PrismHR.</li> <li>M: Manager. Someone who works in payroll or human resources for a PEO client.</li> <li>A: Trusted Advisor. Same as Manager but without an Employee ID. Used for consultants.</li> <li>E: Employee.</li> <li>S: Super User in the legacy HRPWE. Similar to I.</li> </ul>
BillingBatchCount	• <b>C</b> : Client Manager in HRPWE.  Controls the number of payroll batches processed at once during the <b>PrismHR Import Payroll Batch Complete</b> scheduled process (which is one of two scheduled processes used by the Payroll Batch process.) By default, it is set to 250. This means that an import file containing more than 250 batches is processed in chunks of 250 to reduce impact on the server. Also see Configuring the Payroll Batch Scheduled Processes.

Parameter	Value settings
CanCreateWorkspaces	Created to support multi-tenant environments where there are multiple PrismHR API imports and a need to specify which PrismHR import feeds create a new workspace from an import record and which do not.
	When PrismHR nightly imports run, ClientSpace evaluates each import file to determine if the <b>PEOID</b> in the import file matches the <b>Secondary ID</b> entered on the API Configuration record. If there is a match, ClientSpace then references the <b>CanCreateWorkspaces</b> parameter to determine if a workspace should be created using the following logic:  • If the <b>CanCreateWorkspaces</b> parameter is set to a value of 1
	<ul> <li>and the Client Number does not already exist for the PEOID, a new workspace is created.</li> <li>If the CanCreateWorkspaces parameter is set to a value of 0 or is blank, a new workspace is <u>not</u> created.</li> </ul>
ContactImportBehavior	<ul> <li>Insert/Both: Allows Import Queue record creation for Contacts in PrismHR but not in ClientSpace.</li> <li>Update: For Contacts in PrismHR but not in ClientSpace, it does not create an Import Queue record. It updates existing ClientSpace Contacts with changes.</li> </ul>
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.
	<ul> <li>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).</li> </ul>
ExcludedContractTypes	ASO and HRO are the PrismHR Service Types that should not be

Parameter	Value settings
	imported into ClientSpace.
ExcludeEmailDomains	Email domains that should not be imported into ClientSpace. Supports comma-separated list.
ExcludeUserNames	User names that should not be imported into ClientSpace.
FailureRetryTime	<ul> <li>O: Reprocesses all failed Import Queue records.</li> <li>X: Reprocesses failed Import Queue records with an UpdatedDate greater than X hours.</li> <li>If not present (default), failed Import Queue records are not reprocessed.</li> </ul>
GetPayrollBatchCutoffDate	<ul> <li>Remote Cutoff Date is the deadline for reporting payroll.</li> <li>O: Do not retrieve the Batch Control Remote Cutoff Date in the import.</li> <li>1: Include the Remote Cutoff Date if available in the Payroll Batch in PrismHR.</li> <li>If GetPayrollBatchCutoffDate not present, defaults to O.</li> <li>GetPayrollBatchCutoffDate parameter requires version 1.22 or higher of the PrismHR API. Specify the version in the URL in Endpoint. For example, https://api.prismhr.com/api-1.22/services/.</li> </ul>
HRPRunImport	<ul> <li>0: The files generated by the API Import appear in the Manage Import File List at status Ready for Import.</li> <li>1: The files generated by the API Import automatically import into ClientSpace.</li> </ul>
InitialImportClients	Sets how many queue records of each import map type are processed at a time.
InitialMaxEmployeeCount	<ul> <li>Sets the threshold of maximum number of Employees to import during a scheduled process run.</li> <li>If no Value is set, it processes all Employees for Clients (up to the InitialImportClients count) during a scheduled process run.</li> <li>If a Value is set, after obtaining a list of Employees, if the</li> </ul>

Parameter	Value settings
	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	<ul> <li>0: Any leading zeros on CompanyID in PrismHR are stripped off before the Client Record is saved.</li> <li>1: Leading zeroes on CompanyID are retained when importing records into ClientSpace.</li> </ul>
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.
OSHAYearsToProcess	<ul> <li>This parameter denotes the number of years to get the OSHA totals from PrismHR.</li> <li>Not Present: If the parameter is not present, then limit the number of years to the past year.</li> <li>1 or Less: If the parameter is set to 1 or less, then limit the number of years to the past year.</li> <li>2 If the parameter equals 2, then limit the number of years to the past two years.</li> <li>3 or Greater: If the parameter equals 3 or greater, then limit the number of years to the past three years.</li> </ul>
ProcessVouchers	<ul> <li>0: Queued Employee Payroll Vouchers are not processed immediately.</li> <li>1: Employee Payroll Vouchers are processed as they are imported.</li> </ul>
RequireBillingVouchers	• <b>0</b> : If Billing Vouchers cannot be located for a Client, the Payroll Voucher data is processed (will be missing all Billing-related mapped fields).

Parameter	Value settings
	• 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 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 -- It is now scripted out as inactive). Scheduled processes **PrismHR Import Queue Initial Clients** and **PrismHR Import Initial Sync** are used now.

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	<ul> <li>Username (case sensitive)</li> <li>Password (case sensitive)</li> <li>PEO ID (case sensitive)</li> <li>HRP API URL. The endpoint of the WSDL on the server to be used.</li> </ul>
Account	The Account must be Enabled.
Subscriptions	<ul> <li>The Account must have permission to create subscriptions (for Imports only).</li> <li>The following subscriptions are automatically created on the PrismHR server when the process first executes:</li> <li>Employee/Person   Client   Compensation. Description is: "ClientSpace Employee Person-Client-Compensation Subscription All Clients"</li> <li>Client/Master   Location. Description is "ClientSpace Client master Subscription All Clients"</li> </ul>

Requirements  PrismHR requires the following for each Client:  Business Entity Type (Example: LLC, S Corp, etc.) (Client Details)	HRP site	Parameters
<ul> <li>Payroll Check Account (Account)</li> <li>Garnishments Check Account (Account)</li> <li>Receipts Account (Account)</li> <li>Processing Schedule (Control)</li> <li>GL Template (Control)</li> <li>Bill Format (Billing)</li> <li>Billing Template (Billing)</li> <li>Delivery Method (Payroll)</li> <li>Pay Groups (Payroll)</li> <li>Pay Groups (Payroll)</li> <li>Pay Group</li> <li>Description</li> <li>Pay Schedule</li> <li>Pay Date</li> <li>Job Codes (Positions)</li> </ul>		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

#### **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
    - o creates the new subscriptions in PrismHR
    - o updates our subscription dataforms with the new information
    - o 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 Sync**).
- 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!.!ClientTeam	
107!.!107!.!Employee	

- 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.

#### Employment Status Codes

- Employment Status Codes are recorded in the ClientSpace **Employment Status** (EmploymentStatus) field. The code imports from the PrismHR vemployeeStatus field. See the ClientSpace API Data Mapping file in Attachments.
- To determine a "Termination" code, ClientSpace uses the PrismHR **Status Classification** (statusCode) field. See the ClientSpace API Data Mapping file in Attachments.
- If the PrismHR statusCode is set to "Terminated", the ClientSpace **Employment Status** field is updated to "Terminated" and the ClientSpace **Termination Date** is set to the PrismHR statusDate value. If PrismHR statusCode is NOT set to "Terminated", the ClientSpace **Employment Status** field is updated to the value in the PrismHR employeeStatus field.

#### **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.

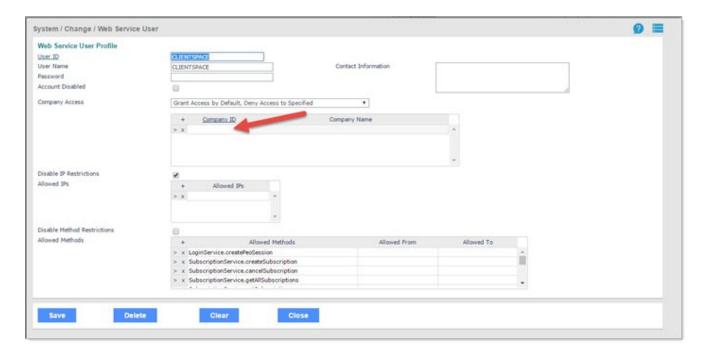
#### Web services company restricted list

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:

- 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.



#### **Ongoing 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 show the queue record in **Failure** status and add a message to the Import Queue Log Data for the following Ongoing import types: Location, 19, Employee, Employment, Contact, User, PayrollBatch, Company, ClientTeam, Codes, and Employee Future Change.

When a PrismHR API - USERS import has a missing or invalid email address, we show the queue record in **Requires Attention** status and we add a message to the Import Queue Log Data. The message follows this format: "User '<username>' invalid or missing email address <invalid email>, queue record set to Requires Attention".

For example, if the email address for the user **carlos** was **carlos@gmail**, the system would evaluate the email address as incomplete (since the email address was missing .com from the end) and add the message "User carlos invalid or missing email address carlos@gmail, queue record set to Requires Attention." to the import queue log.

## 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**

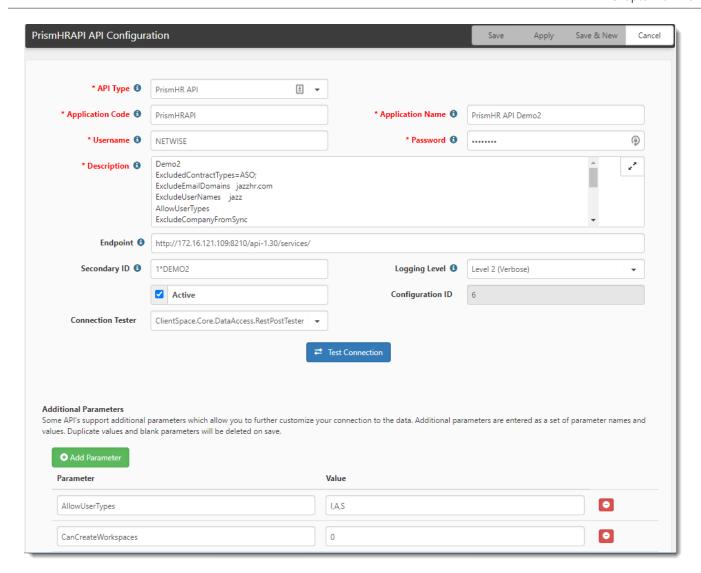
Configure the Import Map Headers for each file type to be produced. The configured headers MUST match the PEO headers listed in the following table. You must configure the Custom Import Class for each Header.

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.

Ongoing Imports: Configuring the API for Import Map Details

Configure the parameters for the import file.



### To configure the API:

- 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. The API Configuration fieldset connects the specific PrismHR installation for the client.

API Type	Select PrismHR API.
Application Code	Use a unique value to denote the PrismHR installation, such as

	PrismHRAPI.
Application Name	A description that displays in the ClientSpace lists. Use something to indicate the installation, such as <b>PrismHR API</b> .
Username	The username registered with the PrismHR API for this site.
Password	The password that is associated with the PrismHR Account Username for this site.
Description	Provide a description.
Endpoint	A formatted URL pointing to the API services for the specific PrismHR client and site (must include the trailing / character).
	For the <b>GetPayrollBatchCutoffDate</b> parameter, specify version 1.22 or higher of the PrismHR API. <b>Note</b> : Failure to update the version in the API Endpoint config results in the following error in the API log: Error Processing Batch Control Info '202023.104', error=Unexpected character encountered while parsing value: }. Path 'PayrollBatchWithOptionsResponse', line 1, position 35., queue record will be in Pending status.
Secondary ID	An identifier that is used to enable the monitoring of all PrismHR clients at an installation.
Logging Level	<ul> <li>The PrismHR Export process for Company Information and Employee/Employment information contains important log information to monitor the export activity from ClientSpace to PrismHR.</li> <li>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 PrismHR API call and ClientSpace action (up to the Import Phase). Errors and Information entries are created.</li> <li>When set to Level 1, only ERRORS are logged to the Scheduled Process History Table.</li> <li>When set to Level 0 (None), No log data is produced.</li> </ul>
Active	When this option is selected, the configuration is active (enabled).

## **To configure Additional Parameters:**

This is where you specify a set of name-value pairs to configure the process.



## 1. Click Add Parameter.

A new row opens.

2. Select from the following list to add parameters.

Parameter	Value settings
AllowUserTypes	Defines the types of users included in a user import:
	• I: Internal User. Someone who works for the PEO or someone at PrismHR.
	<ul> <li>M: Manager. Someone who works in payroll or human resources for a PEO client.</li> </ul>
	<ul> <li>A: Trusted Advisor. Same as Manager but without an Employee ID. Used for consultants.</li> </ul>
	• E: Employee.
	• <b>S</b> : Super User in the legacy HRPWE. Similar to <b>I</b> .
	• <b>C</b> : Client Manager in HRPWE.
BillingBatchCount	Controls the number of payroll batches processed at once during the <b>PrismHR Import Payroll Batch Complete</b> scheduled process (which is one of two scheduled processes used by the Payroll Batch process.) By default, it is set to 250. This means that an import file containing more than 250 batches is processed in chunks of 250 to reduce impact on the server. Also see Configuring the Payroll Batch Scheduled Processes.
CanCreateWorkspaces	Created to support multi-tenant environments where there are multiple PrismHR API imports and a need to specify which PrismHR import feeds create a new workspace from an import record and which do not.

Parameter	Value settings
	When PrismHR nightly imports run, ClientSpace evaluates each import file to determine if the <b>PEOID</b> in the import file matches the <b>Secondary ID</b> entered on the API Configuration record. If there is a match, ClientSpace then references the <b>CanCreateWorkspaces</b> parameter to determine if a workspace should be created using the following logic:  • If the <b>CanCreateWorkspaces</b> parameter is set to a value of 1 and the <b>Client Number</b> does not already exist for the <b>PEOID</b> , a new workspace is created.  • If the <b>CanCreateWorkspaces</b> parameter is set to a value of 0 or is blank, a new workspace is not created.
ContactImportBehavior	<ul> <li>Insert/Both: Allows Import Queue record creation for Contacts in PrismHR but not in ClientSpace.</li> <li>Update: For Contacts in PrismHR but not in ClientSpace, it does not create an Import Queue record. It updates existing ClientSpace Contacts with changes.</li> </ul>
DefaultProjectCode	Defines where an employee portal case is created if no workspace match is found. Uses ProjectCode from workspace settings.
ExcludeCompanyFromSync	<ul> <li>O: 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.</li> <li>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).</li> </ul>
ExcludedContractTypes	ASO and 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.

Parameter	Value settings
ExcludeUserNames	User names that should not be imported into ClientSpace.
FailureRetryTime	<ul> <li>O: Reprocesses all failed Import Queue records.</li> <li>X: Reprocesses failed Import Queue records with an UpdatedDate greater than X hours.</li> <li>If not present (default), failed Import Queue records are not reprocessed.</li> </ul>
GetPayrollBatchCutoffDate	<ul> <li>Remote Cutoff Date is the deadline for reporting payroll.</li> <li>O: Do not retrieve the Batch Control Remote Cutoff Date in the import.</li> <li>1: Include the Remote Cutoff Date if available in the Payroll Batch in PrismHR.</li> <li>If GetPayrollBatchCutoffDate not present, defaults to O.</li> <li>GetPayrollBatchCutoffDate parameter requires version 1.22 or higher of the PrismHR API. Specify the version in the URL in Endpoint. For example, https://api.prismhr.com/api-1.22/services/.</li> </ul>
HRPRunImport	<ul> <li>0: The files generated by the API Import appear in the Manage Import File List at status Ready for Import.</li> <li>1: The files generated by the API Import automatically import into ClientSpace.</li> </ul>
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.
OSHAYearsToProcess	<ul> <li>This parameter denotes the number of years to get the OSHA totals from PrismHR.</li> <li>Not Present: If the parameter is not present, then limit the number of years to the past year.</li> <li>1 or Less: If the parameter is set to 1 or less, then limit the number of years to the past year.</li> <li>2 If the parameter equals 2, then limit the number of years to</li> </ul>

Parameter	Value settings
	<ul> <li>the past two years.</li> <li>3 or Greater: If the parameter equals 3 or greater, then limit the number of years to the past three years.</li> </ul>
ProcessVouchers	<ul> <li>0: Queued Employee Payroll Vouchers are not processed immediately.</li> <li>1: Employee Payroll Vouchers are processed as they are imported.</li> </ul>
RequireBillingVouchers	<ul> <li>0: If Billing Vouchers cannot be located for a Client, the Payroll Voucher data is processed (will be missing all Billing-related mapped fields).</li> <li>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).</li> </ul>

## 3. Click Save.

For GetPayrollBatchCutoffDate, ensure that the correct version of the PrismHR API is reflected in the Endpoint URL. After the scheduled process runs, review the API log for any errors.

## **PrismHR Subscription Dataforms**

In the Admin Workspace, there are typically three of the following 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 PrismHR Import Ongoing Scheduled Process.

For the system to auto-populate the record, 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
	<ul> <li>Description</li> </ul>
	Pay Schedule
	Pay Date
	<ul> <li>Job Codes (Positions)</li> </ul>

## **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.

## Import Queue records stuck in In-Progress status

The system converts import queue records to import file rows. As the system processes the file, the system updates the import queue record status. The first status is **In Progress**. If the import is aborted, the queue record will be stuck in the **In Progress** status. If this occurs, the system will retrieve records that have been in the **In Progress** status for more than an hour. The system will reset the status to **Pending** and allow the process to retrieve current data via the PrismHR API.

#### 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

<ul> <li>section of the API configuration replacing XXX,YYY with the comma separated (or singular) list of PrismHR Service Types.</li> <li>Service Types must be comma-separated (if there are multiples to exclude).</li> <li>This setting applies to Import Initial Queue Clients and Import Initials scheduled processes.</li> <li>If a Client is of an excluded contract type, it is not included in the import file.</li> <li>Import Queue records are not created for Clients that are excluded (for remaining initial import maps).</li> </ul>
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.
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.
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
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. If this parameter is not set on the import configuration, the system adds the parameter and sets the value to 500.
<ul> <li>Insert/Both: Allows Import Queue record creation for Contacts that are in Prism but not in ClientSpace.</li> <li>Update: Does not allow Import Queue record creation for</li> </ul>

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.

**Note:** During an Import, if an exception occurs during the dataform save, the system logs an appropriate exception in both the Import logs and the exception log.

#### 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 **PrismHR Import Ongoing** scheduled process 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.
- If importing data from a Client Team event, and the 'my SupportTeamDashboard' value is empty, the system clears the value on the Client Team form (unless a default value is configured in the import).

Activation Date mapping - The system evaluates the Set Activation Date on Import business
rule during import. If the Activation Date is populated, and the status equals Client, the system
accepts the imported value. If the Status does not equal Client (for example, Terminated) the
system reverts to the previous value.

## 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).
- Employment Status Codes are recorded in the ClientSpace **Employment Status** (EmploymentStatus) field. The code imports from the PrismHR employeeStatus field. See the ClientSpace API Data Mapping file in Attachments.
- To determine a "Termination" code, ClientSpace uses the PrismHR **Status Classification** (statusCode) field. See the ClientSpace API Data Mapping file in Attachments.
- If the PrismHR statusCode is set to "Terminated", the ClientSpace **Employment Status** field is updated to "Terminated" and the ClientSpace **Termination Date** is set to the PrismHR statusDate

value. If PrismHR statusCode is NOT set to "Terminated", the ClientSpace **Employment Status** field is updated to the value in the PrismHR employeeStatus field.

## Benefit data

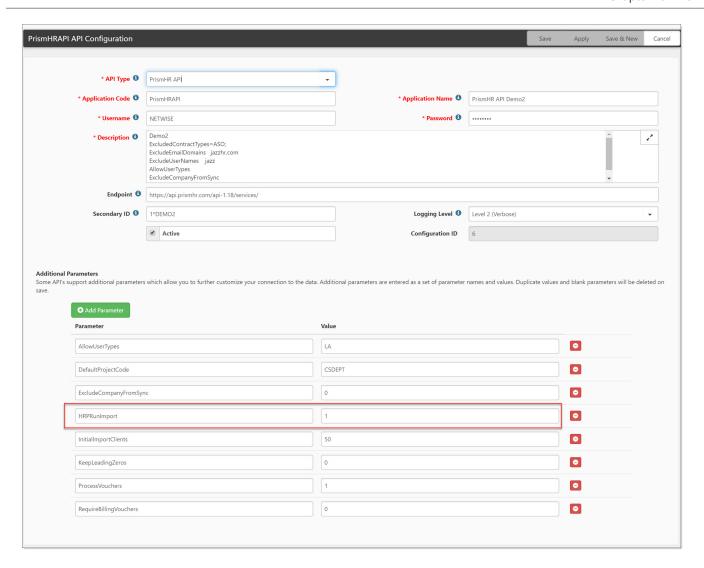
• If the Employment record is not found, the Import Queue record is set to Completed, with a note indicating the Employment record was not found.

## 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 thiseEvent 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

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

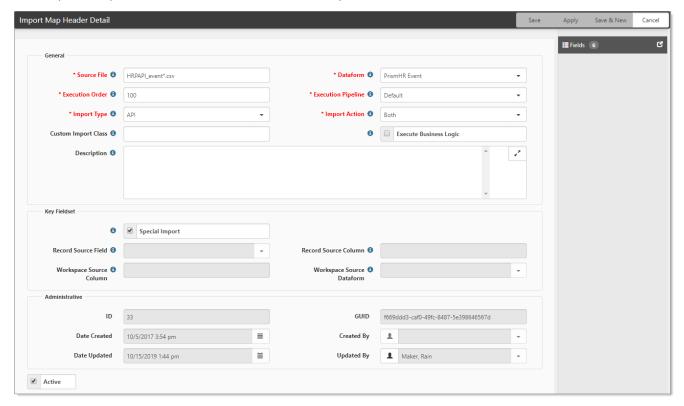
When retrieving User Details for a User from an Import Queue record, if PrismHR returns an error "User xxxx does not exist," the existing ClientSpace User record is set to Inactive (if it exists). The queue record is set to Completed with the message "User 'userId' cannot be found in Prism, inactivated in ClientSpace (if exists), queue record automatically Completed."

## **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.

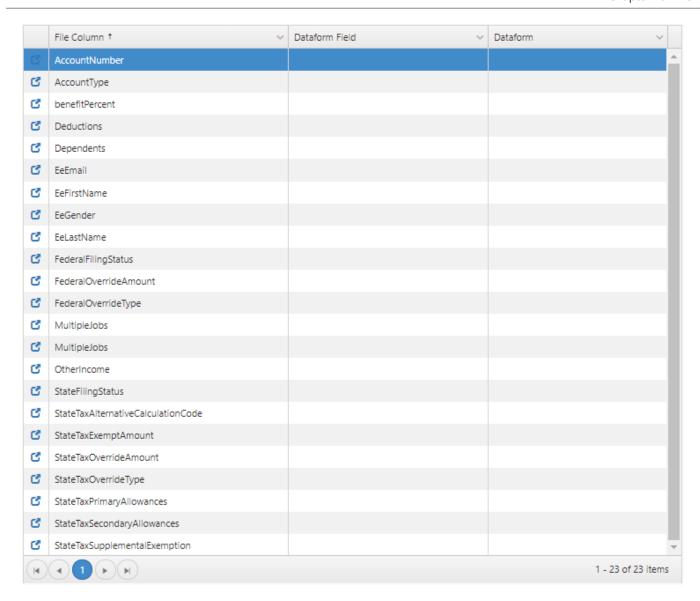


Field	Description
Source File	HRPAPI_event*.csv
Dataform	PrismHR Event
Execution Order	100
Execution Pipeline	Default
Import Type	API
Special Import	True (selected)

## Import Map Field Search

From the Import Map Header Detail form, click **Fields** to display a list of the HRPAPI\_event\*.csv fields.

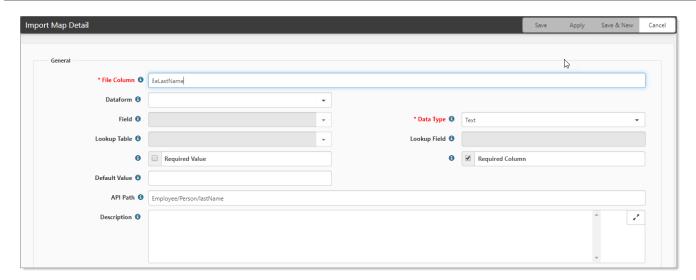
The following graphic illustrates the HRPAPI\_event\*.csv fields.



### **Import Map Detail**

From the Import Map Search, click the click (Jump button for a field to display the 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 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 Form and User Record Configuration

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 the PrismHR user.
- The Third Party LoginID must be mapped to a valid ClientSpace User through a third party application (TPA) record. 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.

The user record should also be assigned an Authentication Type of SSO. This activates the following behavior:

- The **Password Never Expires** checkbox located in the Administrator Settings section of the user record is checked and becomes Read Only.
- If an SSO user attempts to login via the ClientSpace login page, the following message displays: "This user is not configured for login here, please contact your ClientSpace Administrator."



### To configure the Third Party Application (TPA):

- 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.

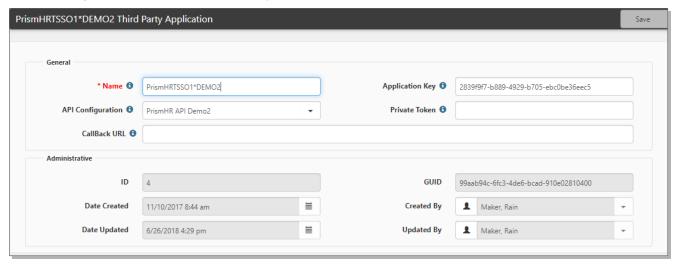


3. Complete the form:

Name	Type <b>PrismHRTSSO</b> + <b>PeoID</b> , 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.

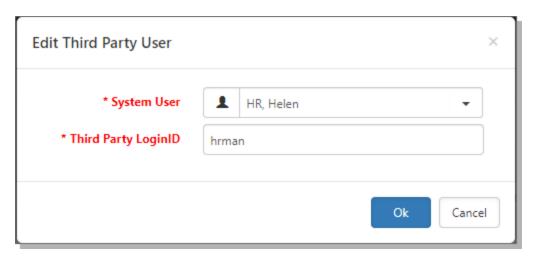
This action generates the Application Key.



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.
- In the Action Center, select Users.
   The Third Party Application Users dashboard opens.
- Locate a user and click (Jump).
   The Edit Third Party User form opens.

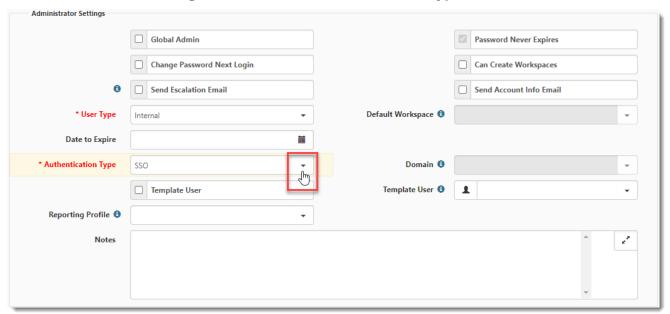


4. Click Ok.

The user is added to the application.

## To specify the SSO Authentication Type on the ClientSpace User Record:

- Go to System Admin > Users.
   The Users dashboard opens.
- 2. Scroll through the list of users or use Search to locate the user.
- 3. When you locate the user, double-click the row or click (Open) next to the user name. The User Details form opens.
- 4. In the Administrator Settings fieldset, select an Authentication Type of SSO.



5. Click Save.

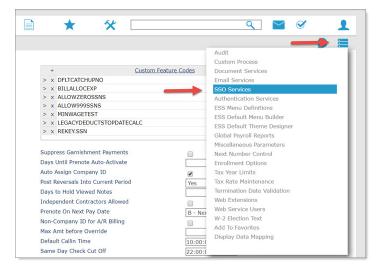
### **PrismHR Configuration**

## To specify the ClientSpace TSSO Url:

1. In PrismHR, select Back Office System > Change, System Parameters.



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."

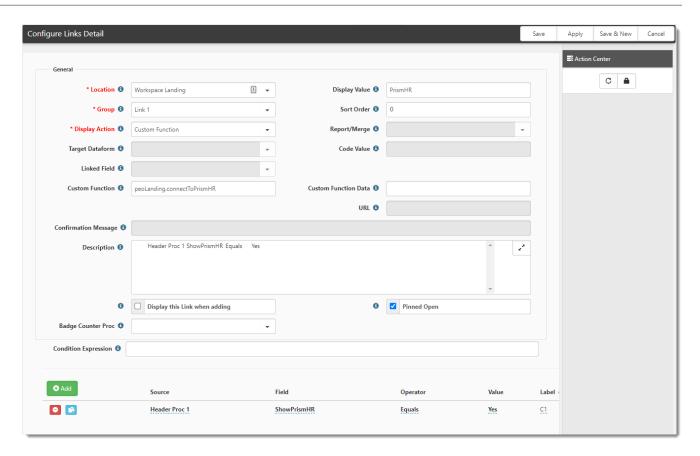
- 4. ClientSpace attempts to connect to the API using the credentials on the API Configuration record.
  - If unable to connect, display message "Unable to connect to PrismHR for validation. Please contact your ClientSpace Administrator."
  - If able to connect but no session returned from PrismHR, display 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 + Peold 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:

- 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	<ul> <li>Type one of the following:</li> <li>peoLanding.connectToPrismHR (Client Master)</li> <li>clientServiceCase.connectToPrismHR (Client Service Case)</li> </ul>
Display Conditions	<ul> <li>Source: Header Proc 1</li> <li>Trigger Field: ShowPrismHR</li> <li>Trigger Value: True</li> </ul>

### 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).
- Scheduled process **HRPImportInitialSync** creates a Pending import queue record for each INITIAL Employee, Employment and I9 import map for every employee associated with a Client. This ensures that when the PrismHR INITIAL Import runs, the Pending import queue records are processed first and in this order: Employee, Employer, and I9.

**Note:** ONGOING imports resume after the INITIAL import queue records have completed.

- 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.

### Scheduling an Initial Import

The Initial Import form is accessed in the **Admin Workspace** and works in both multi-tenant and single-tenant environments. It allows you to run specific types of Initial Imports for PrismHR or HCM. For instance, you can run an initial import for a single API configuration, several API configurations, or all API configurations.

**Note:** The form is secured to the Developer role. If you need help configuring imports, please contact your ClientSpace Professional Services representative.

Once you create an Initial Import form in the Admin workspace, you click the **Queue Me** link to queue the record for the **PrismHR Scheduled Initial** scheduled process. When the scheduled process runs, it references only the API configurations, Import mappings, and client Import IDs referenced on queued, **Active** Initial Import forms.

**Note:** You can queue the same form more than once. For example, if the process failed the first time due to an incorrect entry on the form, you can correct it and run it again. Each time an Initial Import form is processed, the Queued date and time stamped status change is tracked in the **Log Data** field at the bottom of the form so that you can see if the form was queued more than once.

### Before You Begin: Configuration Notes

Before initial use of this feature, Global administrators should review the configuration and consult a ClientSpace Professional Services team member, if necessary to ensure that ClientSpace is configured properly.

The Initial Import process can be used for single tenant and multi-tenant sites, but not both. The system evaluates the **Use Multitenancy** field value on the PEO Configuration record (**System Admin \* > Administrative Data > PEO Configuration**) to determine this.

### In single tenant environments:

- The **MultiTenant** API Configuration parameter must be set to 0.
- The **Use Multitenancy** field in PEO Configuration must be set to No.
- Client Master dataforms cannot have a PEOID set and the Import ID must be set as the Client Number only.
- Initial Import maps, other than HRPAPI\_initial\_company, must have the **Workspace Source** column set to the **Client Number** (ClientNumber).

### In multi-tenant environments:

- The **MultiTenant** API Configuration parameter must be set to 1.
- The **Use Multitenancy** field in PEO Configuration must be set to Yes.
- Client Master dataforms must have a PEOID set and the Import ID must be set as PEOID:: Client
   Number
- Initial Import maps, other than HRPAPI\_initial\_company, must have the **Workspace Source** column set to the **Import ID** (ClientNumberImportID).

#### Accessing the Admin Workspace

There is more than one way to access the Admin Workspace:

From the modules bar, click QWorkspaces.
 The Workspace Search dashboard opens.

2. Type %Admin in the search box to filter the list of workspaces and locate Admin Workspace.

OR

On the modules bar, on the right side, click <username> > Modules.
 The Modules Search dashboard opens. The Admin Workspace is listed at the top of the dashboard.

Then, double-click the workspace row in the grid or click (Open) next to the workspace name.

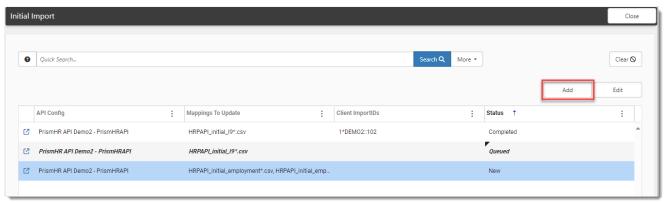
### Completing the Initial Import Form

### To complete the Initial Import form:

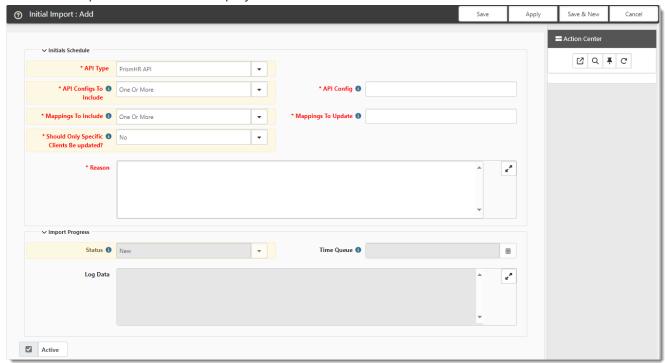
1. Once in the Admin Workspace, type "Initial" in the dataform search box to display the **Initial Import** tile.



- Click the Initial Import tile to open the Initial Import dashboard.
   This is where previously entered Initial Import records are listed and managed. The Status column shows which records are New (i.e., not queued), Queued, or Completed. Inactive records display in bold. italicized text.
- 3. Click Add.



## The Initial Import: Add window displays.

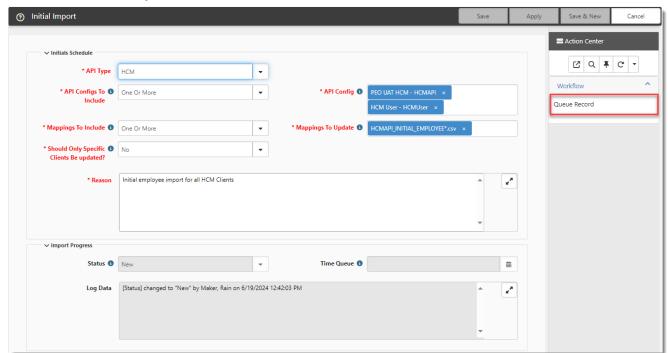


# 4. Complete the form.

API Type	Defaults to <b>PrismHR API</b> . Click the down arrow to select HCM if you are configuring the Initial Import form for a PrismHCM API import. <b>Note:</b> The <b>API Config</b> field is filtered to display only PrismHR or PrismHCM API configuration records based on your selection.
API Configs To Include	Defaults to <b>One or More</b> . Valid selections are <b>One or More</b> and <b>All</b> . If you select One or More, you can select the APIs you want to run from the <b>API Config</b> field. If you select <b>All</b> , the <b>API Config</b> field is inaccessible as all APIs associated with the <b>API Type</b> will run.
API Config	If you selected <b>One or More</b> in <b>API Configs to Include</b> , click in the field to select one or more API configurations from a filtered list of API configurations associated with the <b>API Type</b> .
Mappings to Include	Defaults to <b>One or More</b> . Valid selections are <b>One or More</b> and <b>All</b> . If you select One or More, you can select the API mappings you want to run from the <b>Mappings to Update</b> field. If you select <b>All</b> , the <b>Mappings to Update</b> field is inaccessible as all Import Mappings associated with

	the API Type and API Configs to Include will run.
Mappings to Update	If you selected One or More in <b>Mappings to Include</b> , click in the field to select one or more Import Mappings from a filtered list of mappings associated with the selected <b>API Type</b> and <b>API Configs to Include</b> .
Should Only Specific Clients Be Updated?	Defaults to <b>No</b> . Valid selections are <b>Yes</b> and <b>No</b> . Leave the field set to No if you want the specified initial imports to run for all clients (i.e., all Import IDs). Select Yes if you want the specified initial imports to run for selected clients. If you select Yes, the <b>Client Import IDs</b> field displays:
Client ImportIDs	If <b>Should Only Specific Clients Be Updated?</b> is set to Yes, add one or more <b>Client Import IDs</b> where you want the specified initial imports to run. Separate multiple Client Import IDs with a comma.
Reason	Enter a note detailing the reason for the initial import.
Status	Displays the current status of the initial import form. This is a system- generated value that cannot be manually edited.
Time Queue	Displays a date and time stamp of when initial import form was last queued. This is a system-generated value that cannot be manually edited.
Log Data	Tracks Initial Import form statuses (New, InProgress, Queued, Completed, etc.) This is a system-generated value that cannot be manually edited.

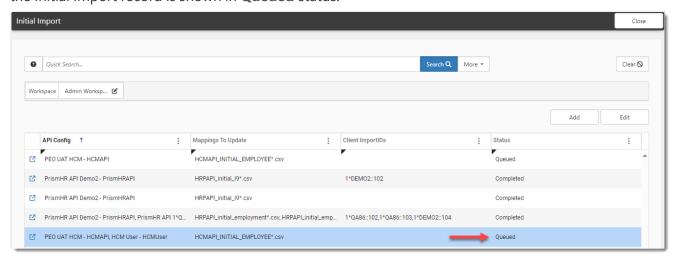
# 5. What do you want to do?



• Queue the initial import: Click Queue Record in the Action Center.

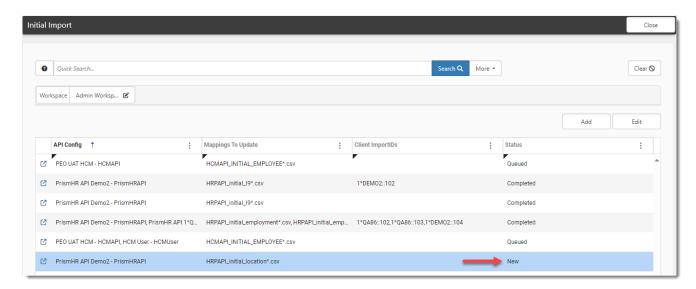
The Initial Import record is simultaneously saved and queued.

Click **Cancel** to close the Initial Import record and return to the Initial Import dashboard where the Initial Import record is shown in **Queued** status.



• Save the Initial Import record without queuing it: Click Save.

The Initial Import record closes and you are returned to the Initial Import dashboard where the Initial Import record is shown in **New** status.



Queue the record when you are ready by returning to the Initial Import dashboard, clicking **(Open)** next to the record to open the Initial Import form and then clicking **Queue Record** in the Action Center of the form.

## **Related Topics:**

- Preventing a Queued Initial Import from Running
- Scheduled Processes

### Preventing a Queued Initial Import from Running

If you have already queued an Initial Import form but later decided that you do not want the scheduled process to run it, you can inactivate the form. Inactive forms are not picked up by the scheduled process. You can always return to an inactivated, queued form and activate it again when you are ready for it to be picked up by the scheduled process the next time it runs.

### Accessing the Admin Workspace

There is more than one way to access the Admin Workspace:

- 1. From the modules bar, click **QWorkspaces**. The Workspace Search dashboard opens.
- 2. Type %Admin in the search box to filter the list of workspaces and locate Admin Workspace.

OR

On the modules bar, on the right side, click <username> > Modules.
 The Modules Search dashboard opens. The Admin Workspace is listed at the top of the dashboard.

Then, double-click the workspace row in the grid or click (Open) next to the workspace name.

### Inactivating a Queued Initial Import Form

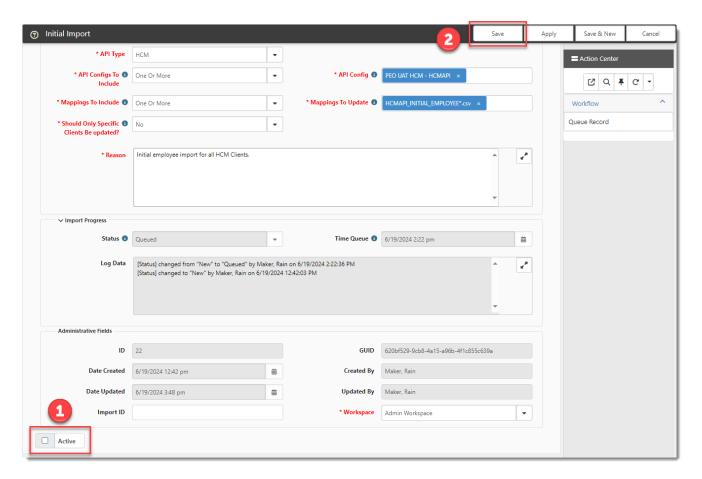
### To inactivate a queued Initial Import form:

1. Once in the Admin Workspace, type "Initial" in the dataform search box to display the **Initial Import** tile.

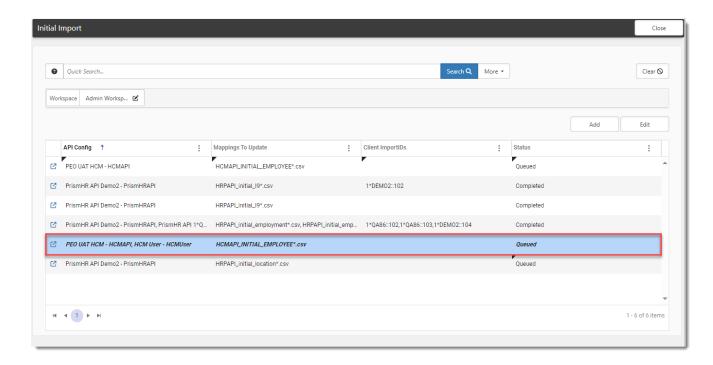


- 2. Click the **Initial Import** tile to open the Initial Import dashboard.

  This is where previously entered Initial Import records are listed and managed. The **Status** column shows which records are **New** (i.e., not queued), **Queued**, or **Completed**.
- 3. Click (Open) next to the queued record to open the Initial Import form
- 4. At the bottom of the form, uncheck the **Active** checkbox and click **Save**.



You are returned to the Initial Import Dashboard where the record is shown in bold, italic text indicating that it is inactive.



## **Related Topics:**

- Scheduling an Initial Import
- Scheduled Processes

### **Scheduled Initial Imports**

You can schedule initial imports using the Initial Import form. The Initial Import form is accessed in the **Admin Workspace** and works in both multi-tenant and single-tenant environments. It allows you to run specific types of Initial Imports for PrismHR.

### Scheduling an Initial Import

The Initial Import form is accessed in the **Admin Workspace** and works in both multi-tenant and single-tenant environments. It allows you to run specific types of Initial Imports for PrismHR or HCM. For instance, you can run an initial import for a single API configuration, several API configurations, or all API configurations.

**Note:** The form is secured to the Developer role. If you need help configuring imports, please contact your ClientSpace Professional Services representative.

Once you create an Initial Import form in the Admin workspace, you click the **Queue Me** link to queue the record for the **PrismHR Scheduled Initial** scheduled process. When the scheduled process runs, it references only the API configurations, Import mappings, and client Import IDs referenced on queued, **Active** Initial Import forms.

**Note:** You can queue the same form more than once. For example, if the process failed the first time due to an incorrect entry on the form, you can correct it and run it again. Each time an Initial Import form is processed, the Queued date and time stamped status change is tracked in the **Log Data** field at the bottom of the form so that you can see if the form was queued more than once.

### Before You Begin: Configuration Notes

Before initial use of this feature, Global administrators should review the configuration and consult a ClientSpace Professional Services team member, if necessary to ensure that ClientSpace is configured properly.

The Initial Import process can be used for single tenant and multi-tenant sites, but not both. The system evaluates the **Use Multitenancy** field value on the PEO Configuration record (**System Admin \* > Administrative Data > PEO Configuration**) to determine this.

### In single tenant environments:

- The **MultiTenant** API Configuration parameter must be set to 0.
- The **Use Multitenancy** field in PEO Configuration must be set to No.
- Client Master dataforms cannot have a PEOID set and the Import ID must be set as the Client Number only.
- Initial Import maps, other than HRPAPI\_initial\_company, must have the **Workspace Source** column set to the **Client Number** (ClientNumber).

#### In multi-tenant environments:

- The **MultiTenant** API Configuration parameter must be set to 1.
- The **Use Multitenancy** field in PEO Configuration must be set to Yes.
- Client Master dataforms must have a PEOID set and the Import ID must be set as PEOID:: Client
   Number
- Initial Import maps, other than HRPAPI\_initial\_company, must have the **Workspace Source** column set to the **Import ID** (ClientNumberImportID).

#### Accessing the Admin Workspace

There is more than one way to access the Admin Workspace:

- 1. From the modules bar, click **QWorkspaces**. The Workspace Search dashboard opens.
- 2. Type %Admin in the search box to filter the list of workspaces and locate Admin Workspace.

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On the modules bar, on the right side, click <username> > Modules.
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Then, double-click the workspace row in the grid or click (Open) next to the workspace name.

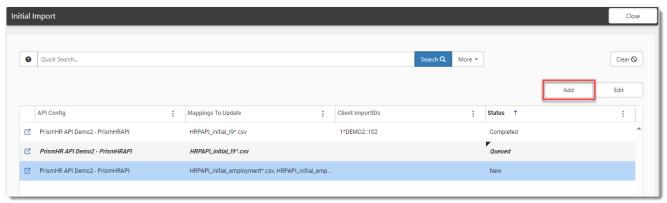
### Completing the Initial Import Form

## To complete the Initial Import form:

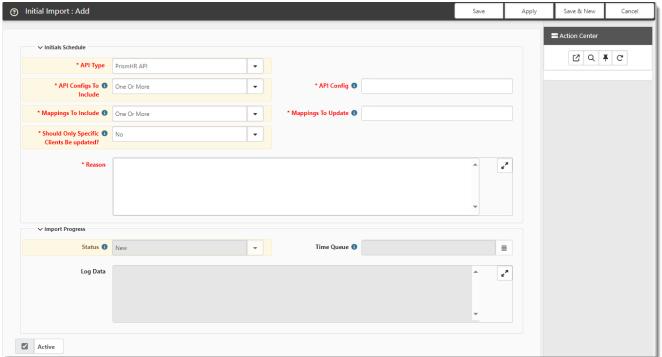
1. Once in the Admin Workspace, type "Initial" in the dataform search box to display the **Initial Import** tile.



- Click the **Initial Import** tile to open the Initial Import dashboard.
   This is where previously entered Initial Import records are listed and managed. The **Status** column shows which records are **New** (i.e., not queued), **Queued**, or **Completed**. Inactive records display in bold, italicized text.
- 3. Click Add.



# The Initial Import: Add window displays.

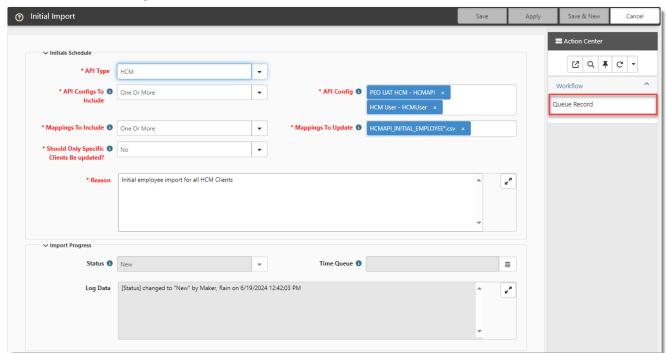


# 4. Complete the form.

API Type	Defaults to <b>PrismHR API</b> . Click the down arrow to select HCM if you are configuring the Initial Import form for a PrismHCM API import. <b>Note:</b> The <b>API Config</b> field is filtered to display only PrismHR or PrismHCM API configuration records based on your selection.
API Configs To Include	Defaults to <b>One or More</b> . Valid selections are <b>One or More</b> and <b>All</b> . If you select One or More, you can select the APIs you want to run from the <b>API Config</b> field. If you select <b>All</b> , the <b>API Config</b> field is inaccessible as all APIs associated with the <b>API Type</b> will run.
API Config	If you selected <b>One or More</b> in <b>API Configs to Include</b> , click in the field to select one or more API configurations from a filtered list of API configurations associated with the <b>API Type</b> .
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	the API Type and API Configs to Include will run.	
Mappings to Update	If you selected One or More in <b>Mappings to Include</b> , click in the field to select one or more Import Mappings from a filtered list of mappings associated with the selected <b>API Type</b> and <b>API Configs to Include</b> .	
Should Only Specific Clients Be Updated?	Defaults to <b>No</b> . Valid selections are <b>Yes</b> and <b>No</b> . Leave the field set to No if you want the specified initial imports to run for all clients (i.e., all Import IDs). Select Yes if you want the specified initial imports to run for selected clients. If you select Yes, the <b>Client Import IDs</b> field displays:	
Client ImportIDs	If <b>Should Only Specific Clients Be Updated?</b> is set to Yes, add one or more <b>Client Import IDs</b> where you want the specified initial imports to run. Separate multiple Client Import IDs with a comma.	
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Log Data	Tracks Initial Import form statuses (New, InProgress, Queued, Completed, etc.) This is a system-generated value that cannot be manually edited.	

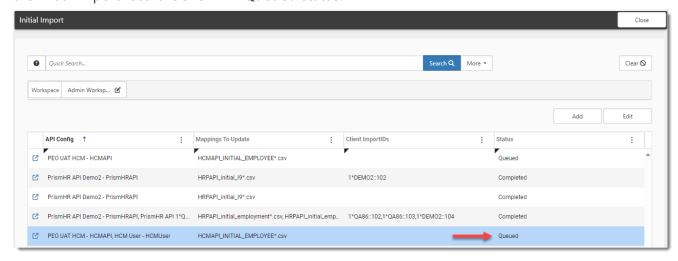
# 5. What do you want to do?



• Queue the initial import: Click Queue Record in the Action Center.

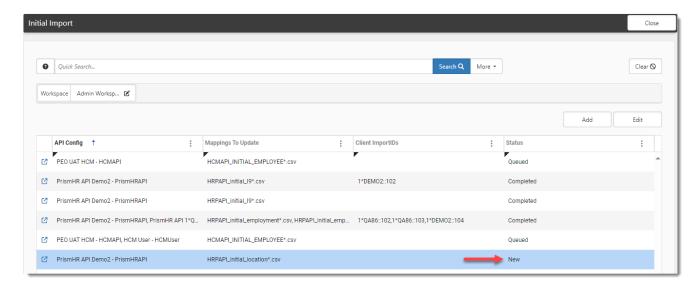
The Initial Import record is simultaneously saved and queued.

Click **Cancel** to close the Initial Import record and return to the Initial Import dashboard where the Initial Import record is shown in **Queued** status.



• Save the Initial Import record without queuing it: Click Save.

The Initial Import record closes and you are returned to the Initial Import dashboard where the Initial Import record is shown in **New** status.



Queue the record when you are ready by returning to the Initial Import dashboard, clicking **G** (**Open**) next to the record to open the Initial Import form and then clicking **Queue Record** in the Action Center of the form.

## **Related Topics:**

- Preventing a Queued Initial Import from Running
- Scheduled Processes

### Preventing a Queued Initial Import from Running

If you have already queued an Initial Import form but later decided that you do not want the scheduled process to run it, you can inactivate the form. Inactive forms are not picked up by the scheduled process. You can always return to an inactivated, queued form and activate it again when you are ready for it to be picked up by the scheduled process the next time it runs.

### Accessing the Admin Workspace

There is more than one way to access the Admin Workspace:

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Then, double-click the workspace row in the grid or click (Open) next to the workspace name.

### Inactivating a Queued Initial Import Form

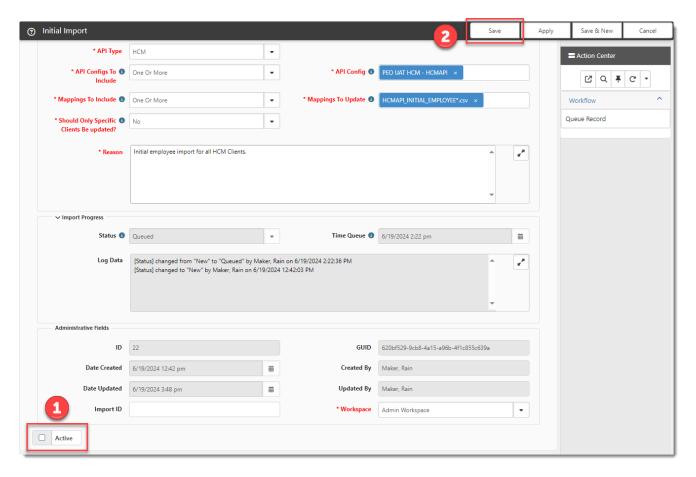
### To inactivate a queued Initial Import form:

1. Once in the Admin Workspace, type "Initial" in the dataform search box to display the **Initial Import** tile.

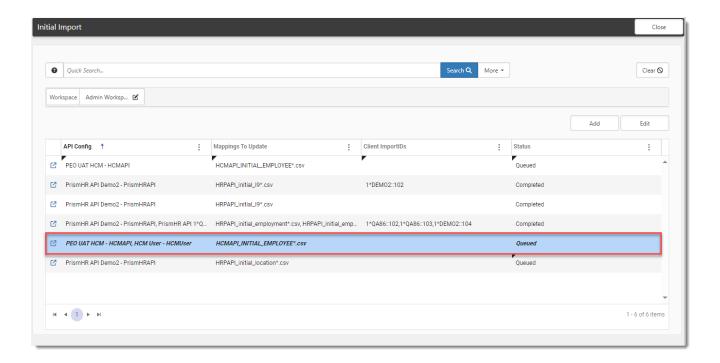


- 2. Click the **Initial Import** tile to open the Initial Import dashboard.

  This is where previously entered Initial Import records are listed and managed. The **Status** column shows which records are **New** (i.e., not queued), **Queued**, or **Completed**.
- 3. Click (Open) next to the queued record to open the Initial Import form
- 4. At the bottom of the form, uncheck the **Active** checkbox and click **Save**.



You are returned to the Initial Import Dashboard where the record is shown in bold, italic text indicating that it is inactive.



## **Related Topics:**

- Scheduling an Initial Import
- Scheduled Processes

# 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 ondemand 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.

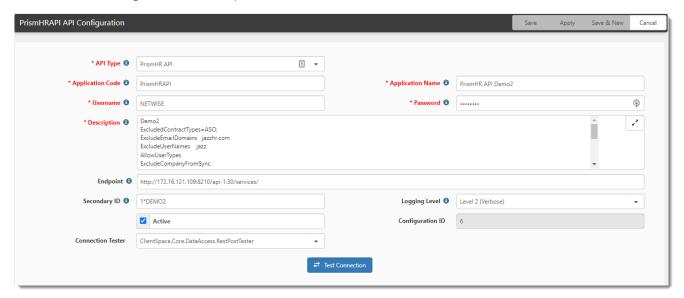
### Configuring the API account information

The API Configuration contains the information to connect to the specific PrismHR installation for the client.

### To configure the API:

- 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 <b>PrismHRAPI</b> as the Primary PrismHR server. There can be multiple instances of this API configuration type for multiple PrismHR servers. Name them <i>PrismHRAPIx</i> . 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 <b>PrismHR API</b> .		
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 <pre>https://api.prismhr.com/api-1.18/services/. Must include the trailing / character.</pre>		
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.		
	• <b>Level 1 (Errors):</b> 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).		
Connection Tester	Select ClientSpace.Core.DataAccess.RestPostTester and Save or Apply display the Test Connection button.		
Test Connection	When the <b>Connection Tester</b> field is set to <b>ClientSpace.Core.DataAccess.RestPostTester</b> , clicking <b>Test Connection</b> connects to the API and either returns a "Connected Successfully" message or an "Unable to connect" message. The "Unable to connect" message lists missing parameters contributing to the failure to connect.		

### 4. Click Save.

### Configuring Client Master and Employee custom links

## To trigger business rules (to validate and export data to PrismHR):

- Go to System Admin → > Advanced > Custom Links.
   The Configure Links dashboard opens.
- Locate the Client Master records. If none exist, then click Add.
   See Configuring Custom Dataform Links for more detail on completing the form.

C	Client Master	Export Client to PrismHR	Action	Submit w/Action	210
ď	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 <b>ExportClient</b> .

- 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 <b>ExportEmployees</b> .

- 7. Click Save.
- 8. For the record **Export Employee to PrismHR** (exporting a single Employee to PrismHR), configure the link as follows:



Location	Select <b>Employee</b> .
Display Value	Type Export Employee to PrismHR.
Code Value	Type <b>EEExport</b> .

#### 9. Click Save.

### Configuring Client Master and Employee business rules

### To configure the Client Master and Employee Business Rules:

- 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.

C	Client Master	gen_ClientMaster	HE_ValidateExportClient	HE_ValidateExportClient	Hard Error	100
C	Client Master	gen_ClientMaster	HE_ValidateExportEmployees	HE_ValidateExportEmployees	Hard Error	100
ď	Client Master	gen_ClientMaster	ExportClientToHRP	ExportClientToHRP	Biz Logic	100
ď	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 *
	<ul> <li>CM.ContractEffectiveDate – translated to cmClientEntry.contractDate (only if populated)</li> </ul>
	H (DeliverChecks)
	ORG.Address2
	ORG.crBusinessType (CategoryCode)
	ORG.Phone (Telephone)
	ORG.Fax
	ORG.Email
	ORG.EmployerIDNumber (EIN)
	ALE ImportID (ALE on the CM) *
	<ul> <li>Processing Team Payroll Specialist User - ImportID (Payroll REP id in Prism)</li> </ul>
	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 *

Data	Description
Employee Export	EE.FirstName *
	EE.LastName *
	• EE.DOB *
	• EE.Address1 *
	EE.ZipCode *
	EE.City *
	EE.State (2 character) *
	• EE.SSN *
	EEI.crEmploymentStatus.ImportID: *
	∘ Terminated = T
	<ul><li>Otherwise, Active = A</li></ul>
	EEI.crEmploymentType.ImportID:
	o Part Time = PT
	o 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

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
	<ul><li>Otherwise, Hourly = H</li></ul>
	• EE.crGender.ImportID: *
	∘ Male = M
	∘ Female = F
	EE.crEthnicClassification.ImportID: *
	○ Caucasian = W
	∘ Asian = A
	<ul><li>Native American = N</li></ul>
	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)
	<ul> <li>HRP API URL. The endpoint of the WSDL on the server to be used</li> </ul>
The Account must be Enabled	

Parameter	
Prism requires the following for each Client:	<ul> <li>Business Entity Type (Example: LLC, S Corp, etc.) (Client Details)</li> <li>Payroll Check Account (Account)</li> <li>Garnishments Check Account (Account)</li> <li>Receipts Account (Account)</li> <li>Processing Schedule (Control)</li> <li>GL Template (Control)</li> <li>Bill Format (Billing)</li> <li>Billing Template (Billing)</li> <li>Delivery Method (Payroll)</li> <li>Pay Groups (Payroll)</li> <li>Pay Group</li> <li>Description</li> <li>Pay Schedule</li> <li>Pay Date</li> </ul>
Job Codes (Positions)	

#### **Exporting to PrismHR**

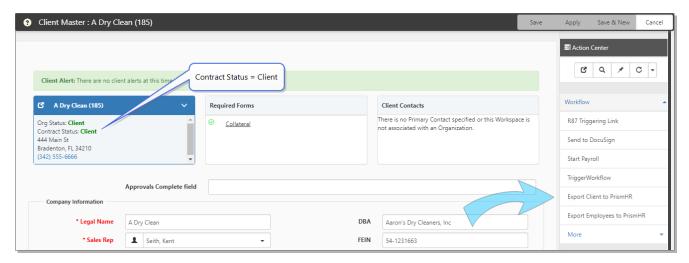
Clients and Employees can be exported from ClientSpace to Prism. The export is performed on-demand using Client Master and Employee header links and business rules. The Client Master must be exported first to create a container in Prism in which to collect the Employees. This process consists of gathering 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**.

**Note:** ClientSpace supports exporting Clients to PrismHR in multi-tenant environments (whereby an install has multiple Prism API configurations and where the **Client Number** may not be unique across Prism database instances.) See Multi-tenant Environments in ClientSpace.

#### **To export Clients:**

- 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:

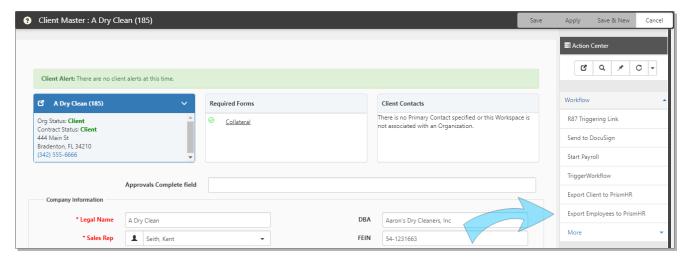
Open the ClientSpace-PrismAPI Data Mapping spreadsheet.

### 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.

The following graphic illustrates the **Export Employees to PrismHR** action item on a client master.



# **Exporting Employees with Multiple Clients**

Exporting an employee (or employees) from ClientSpace to PrismHR allows an employee social security number (SSN) to exist in multiple clients in PrismHR. For example, exporting employees supports the following employee/multi-client scenario:

- Client 123 and Client 456 both exist in ClientSpace and PrismHR
- An employee record exists for employee Bob Roberts with social security number (SSN) 123-45-6789 in both ClientSpace and PrismHR for Client 123 with an employee ID of A1234
- Bob Roberts starts a part-time job with Client 456

- An employee record for Bob is created in ClientSpace under Client 456 by using the same employee data (SSN, date of birth, etc.)
- In ClientSpace, the system admin user uses the Employee Export option to export the employee record to PrismHR.
- During the export, ClientSpace provides PrismHR with the employee SSN for Bob
- PrismHR allows the new employee to be created in Client 456 and will return an EmployeeIdentifier.

# **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 Export Status equals Client Export Complete.

- 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.

# **HCM Import API**

The HCM Import API provides an initial and ongoing import between ClientSpace and HCM to retrieve Client and Employee data from HCM to ClientSpace. Company, Department, Division, Employee, Employment, Job, and Location data are imported for both initial and ongoing imports.

## Importing from HCM to ClientSpace

#### **Process Overview**

• The **HCMUser** API is used by Azure Web services to login to HCM and retrieve the change events. This also creates Queue records. The initial and ongoing imports then use these Queue records to retrieve the HCM data using the **HCMAPI** config.

**Note:** Failure to log in terminates the process and a log entry is generated.

- A list of HCM subscriptions is retrieved from HCM. The subscriptions establish the type of
  information that must be monitored for change events in the ongoing import. For more details,
  also see HCM Import Subscription Processing.
- If running initial imports, the **HCM Import Initial Sync** scheduled process brings over Company data and then brings over Department, Division, Employee, Employment, Job, and Location data to ClientSpace if Active import maps exist for these categories.
- Thereafter, the **HCM Import Ongoing** scheduled process evaluates HCM events (Company and Employee changes) that may affect previously imported Client and Employee data. The ongoing scheduled process also monitors for changes and locates events that trigger the creation of new Clients and Employees in ClientSpace. Active import maps must also exist for the ongoing import

maps. All active ongoing import map configurations are processed each time the scheduled process executes.

- The HCM Import Ongoing scheduled process imports ongoing data for clients only when a matching Client Number exists in ClientSpace.
- ClientSpace ignores inactive Client Master records.
- Applicable HCM events are converted into Import Queue records.
- HCM data is extracted from the Import Queue records and loaded into ClientSpace through scheduled processes.

**Note:** During an Import, if an exception occurs during the dataform save, the system logs an appropriate exception in both the Import logs and the exception log.

### **Related Topics:**

- Importing to ClientSpace from HCM Using Initial Import Sync
- Importing to ClientSpace from HCM Using Ongoing Import
- HCM Import Subscription Processing

## Importing to ClientSpace from HCM Using Initial Import Sync

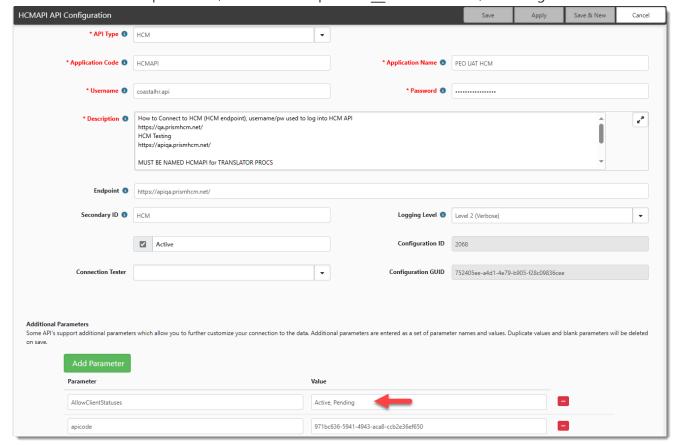
Scheduled process **HCM Import Initial Sync** obtains a list of all clients available through the **HCMAPI** and creates Import records for each. Scheduled process **HCM Import Initial Sync** processes the clients (company) and then imports the remaining Active Import Map data (i.e., department, division, employee, employment, job and location).

### **Prerequisites**

- The HCM Initial Import map for the client record (HCMAPI\_initial\_company\*.csv) must be Active.
   All other initial import records for the data you want to import (HCMAPI\_initial\_department\*.csv,
   HCMAPI\_initial\_division\*.csv, HCMAPI\_initial\_employee\*.csv, HCMAPI\_initial\_employment\*.csv,
   HCMAPI\_initial\_job\*.csv and HCMAPI\_initial\_location\*.csv) must also be Active to receive a full
   compliment of files.
  - \*\*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 have these configurations added. See ClientSpace Data Mapping for the HCM Initial Import API for a list of mapped fields.
- There must be a valid HCM user account in ClientSpace that matches an account in HCM. This is set up on the **HCMUser API**. The account must have permissions in HCM to create subscriptions.

• The HCM API must be properly configured.

**Note:** You can enter an optional Additional Parameter in the HCM API Configuration record named **AllowClientStatuses** which allows you to enter a comma-separated list of client status values to allow when importing. In the example HCM API Configuration record below, only Prism HCM records for clients in Active and Pending status will import into ClientSpace. Prism HCM records for clients in Terminated status will not import. If you do not add the **AllowClientStatuses** parameter, records will import for all client statuses, including Terminated.



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.

### Running the Initial Import

#### To run the Initial Import:

Run the HCM Import Initial Sync scheduled process. (System Admin > Advanced > Scheduled Processes > Select HCM Import Initial Sync > Run Import button.)

- All Companies available on the HCM site are imported.
- Import Queue records are generated for each Company. A list of all other Active Initial Import Maps is retrieved.
- Those Import Queue records are set to Status = InitialPending.
- The **HCM Import Initial Sync** should only execute once. If for some reason it needs to execute multiple times, **DELETE** all of the Import Queue Records before proceeding.
- A list of Import Queue records is retrieved. The quantity to process at once per import map is
  defined in the HCMAPI API Configuration using the value set for the Additional Parameter
  InitialImportClients.
- Import files are generated. In the **HCMAPI** API Configuration, 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.
- Assuming HRPRunImport=1, running the HCM Import Initial Sync again grabs the next set of Import Queue records (i.e., those marked InitialPending). This continues until all Import Queue records are processed (i.e., marked InitialCompleted).

**Note:** During an Import, if an exception occurs during the dataform save, the system logs an appropriate exception in both the Import logs and the exception log.

### **Related Topics:**

- Importing to ClientSpace from HCM Using Initial Import Sync
- Importing to ClientSpace from HCM Using Ongoing Import
- HCM Import Subscription Processing
- ClientSpace Data Mapping for the HCM Initial Import API

## Importing to ClientSpace from HCM Using Ongoing Import

The **HCM Import Ongoing** process evaluates HCM 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 HCM Events. This minimizes the amount of data retrieved from HCM. Data from HCM is extracted and loaded into ClientSpace through a scheduled process.

**Note:** During an Import, if an exception occurs during the dataform save, the system logs an appropriate error the import log. The system only logs the error in the exception login if a catastrophic error occurs.

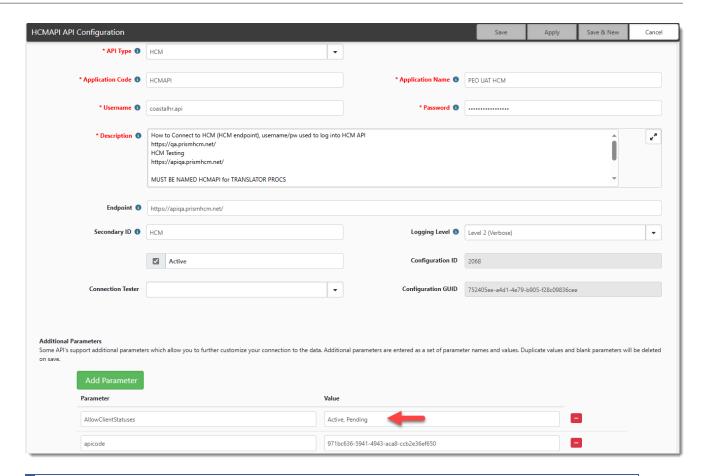
### **Prerequisites**

The HCM Ongoing Import map for the client record (HCMAPI\_ongoing\_company\*.csv) must be
Active. All other ongoing import records for the data you want to import (HCMAPI\_ongoing \_
department\*.csv, HCMAPI\_ongoing \_division\*.csv, HCMAPI\_ongoing \_employee\*.csv, HCMAPI\_
ongoing \_employment\*.csv, HCMAPI\_ongoing \_job\*.csv and HCMAPI\_ongoing \_location\*.csv)
must also be Active.

\*\*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 have these configurations added. See ClientSpace Data Mapping for the HCM Ongoing Import API for a list of mapped fields.

- There must be a valid HCM user account in ClientSpace that matches an account in HCM. This is set up on the **HCMUser API**. The account must have permissions in HCM to create subscriptions.
- The HCM API must be properly configured.

**Note:** You can enter an optional Additional Parameter in the HCM API Configuration record named **AllowClientStatuses** which allows you to enter a comma-separated list of client status values to allow when importing. In the example HCM API Configuration record below, only Prism HCM records for clients in Active and Pending status will import into ClientSpace. Prism HCM records for clients in Terminated status will not import. If you do not add the **AllowClientStatuses** parameter, records will import for all client statuses, including Terminated.



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.

### Running the Initial Import

### To run the Initial Import:

- Run the HCM Import Initial scheduled process. (System Admin > Advanced > Scheduled Processes > Select HCM Import Initial > Run Import button.)
  - A list of HCM Subscriptions is retrieved from HCM. For more information about subscription processing, see HCM Import Subscription Processing .
- The **HCMAPI** parameter value for **HRPRunImport** is retrieved. If set to **0**, it informs the system to generate the import queue files but not import the files. If set to **1**, it informs the system to generate import queue files and import them.
- Events are evaluated and Import Queue records are generated.

- Queued events are then processed for each Active Ongoing Import Map Configuration if HRPRunImport is set to 1.
- After all Subscriptions are processed, the process logs out of the HCM web service.

### **Related Topics:**

- Importing to ClientSpace from HCM Using Ongoing Import
- Importing to ClientSpace from HCM Using Initial Import Sync
- HCM Import Subscription Processing
- ClientSpace Data Mapping for the HCM Ongoing Import API

## **HCM Import Subscription Processing**

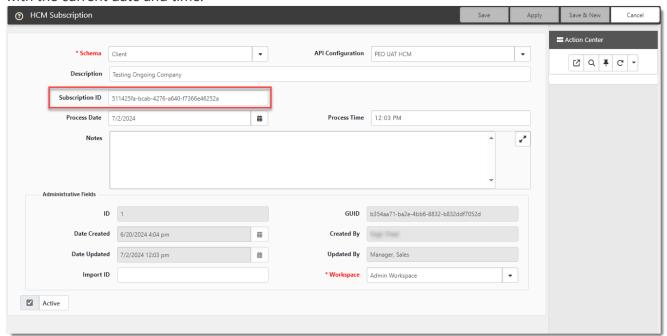
When the HCM Import API runs, HCM subscriptions are processed:

- The subscription list in HCM is compared to the active subscription records in ClientSpace (System Admin > Administrative Data > HCM Subscription).
- In ClientSpace, each active subscription record represents a schema. A schema defines the data being imported: Client, Employee, Location, Division, Department and Job.
   Note: Subscriptions establish the type of information that must be monitored for change events for the ongoing import.
- For each active ClientSpace HCM subscription record, we look for a match in the HCM subscription list. To support this comparison, we created an **HCM Schema** lookup group and lookup values (**System Admin** > **Lookups**) that allows us to match an HCM code to a Code/Decode value pairing in ClientSpace. The code and decode values in the HCM Schema lookup group are as follows:

Code	Decode
0	Client
1	Employee
4	Location
5	Division
6	Department
7	Job

• Each subscription record in ClientSpace is evaluated as follows:

- On the ClientSpace HCM Subscription record for a schema, the ClientSpace Subscription
   ID is compared to the HCM Subscription list for a match.
- If ClientSpace Subscription ID is empty, we subscribe to HCM for that schema, retrieve a Subscription ID (GUID) from HCM and update the ClientSpace Subscription record with the ClientSpace Subscription ID. We also update the Process Date and Process Time fields with the current date and time.



- If the ClientSpace Subscription ID is NOT empty, and a match is found to HCM subscription list, no updates are made. This is a good subscription.
- If the ClientSpace Subscription ID is NOT empty, and no match is found to HCM subscription list, we subscribe to HCM for that schema, retrieve a Subscription ID (GUID) from HCM and overwrite the bad ClientSpace Subscription ID on the ClientSpace Subscription record with a good ClientSpace Subscription ID. We also update the Process Date and Process Time fields with the current date and time.
- We repeat the evaluation step outline above until all ClientSpace subscription records are processed.
- Finally, when all of the ClientSpace records have been processed, we unsubscribe from the records in HCM where a match could not be found.

### **Related Topics:**

- HCM Import Subscription Processing
- Importing to ClientSpace from HCM Using Initial Import Sync
- Importing to ClientSpace from HCM Using Ongoing Import

# ClientSpace Data Mapping for the HCM Initial Import API

These are the mapped fields for the HCM Initial Import.

## Company

## HCMAPI\_initial\_company\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
AccountType	Category	Import_Organization
AssignedTo	Assigned To	Import_Organization
BusinessType	Business Type	Import_Organization
ClientName	Name	Import_Organization
ClientNumber	Client Number	Client Master
CorpType	Corporation Type	Client Master
DateOfFirstPayroll	Date of 1st Payroll	Client Master
DBA		
DescrOfOps	Description of Operations	Client Master
EffDate	Contract Effective Date	Client Master
Fax		
FEIN	EIN	Import_Organization
gen_ClientMaster_ Status	Status	Client Master
HCMCompanyID	HCM Company ID	Client Master
NAICS	NAICS Code	Import_Organization
PEOID	PEO ID	Client Master
Phone	Phone	Import_Organization
Start Date	Date of Incorporation	Client Master

## Department

## HCMAPI\_initial\_department\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	<b>ClientSpace Dataform Source</b>
DepartmentCode	Department Code	Department Code
DepartmentName	Department Name	Department Code

### Division

### HCMAPI\_initial\_division\*.csv

File Column Name	ClientSpace Dataform Field Name	<b>ClientSpace Dataform Source</b>
Address1	Address 1	Division Code
Address2	Address 2	Division Code
City	City	Division Code
DivisionCode	Division Code	Division Code
Name	Division Name	Division Code
Phone	Phone	Division Code
State	State	Division Code
Zip	Zip	Division Code

## **Employee**

### HCMAPI\_initial\_employee\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
Address1	Address1	Employee
Address2	Address2	Employee
City	City	Employee

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
County	County	Employee
DOB	DOB	Employee
Email	Work Email	Employee
EmerContactFirstName	First Name	Employee
EmerContactLastName	Last Name	Employee
EmerContactPhone	Home Phone	Employee
EmerContactRelationship	Relationship	Employee
Employeeldentifier	Employee Identifier	Employee
Ethnicity	Ethnicity	Employee
FirstName	First Name	Employee
Gender	Gender	Employee
LastName	Last Name	Employee
MaritalStatus	Marital Status	Employee
MiddleName	Middle Initial	Employee
MobilePhone	Mobile	Employee
Phone	Phone	Employee
SSN	SSN	Employee
State	State	Employee
Zip	Zip Code	Employee

## **Employment**

## HCMAPI\_initial\_employment\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
CompensationType	Pay Method	Employment
EEOClass	EEO Classification	Employment
Employee	Employee	Employment
EmploymentStatus	Employment Status	Employment
EmploymentType	Employment Type	Employment
HasDeductions	Has Garnishments?	Employment
HasDependents	Has Dependents?	Employment
HireDate	Last Hire Date	Employment
HomeDept	Home Dept.	Employment
IsFLSAExempt	Is FLSA Exempt?	Employment
JobTitle	Job Title	Employment
Location	Location	Employment
OriginalHireDate	Original Hire Date	Employment
PayPeriod	Pay Frequency	Employment
PayRate	Hourly Rate	Employment
StandardHours	Standard Hours (per period)	Employment
TermDate	Termination Date	Employment
TermReason	Reason for Termination	Employment
WorkState	SUTA State	Employment

### Job

### HCMAPI\_initial\_job\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	<b>ClientSpace Dataform Source</b>
JobCode	Job Code	Job Code
JobDescription	Job Class	Job Code
JobName	Job Name	Job Code

### Location

### HCMAPI\_initial\_location\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	ClientSpace Dataform Source
Address1	Addr1	Client Location
Address2	Addr2	Client Location
ArchivedOn		
City	City	Client Location
LocationCode	Location Code	Client Location
LocationName	Location Name	Client Location
State	State	Client Location
Zip	Zip Code	Client Location

### **Related Topics:**

- ClientSpace Data Mapping for the HCM Initial Import API
- Importing to ClientSpace from HCM Using Initial Import Sync
- Importing to ClientSpace from HCM Using Ongoing Import
- HCM Import Subscription Processing

## ClientSpace Data Mapping for the HCM Ongoing Import API

These are the mapped fields for the HCM Ongoing Import.

## Company

## HCMAPI\_ongoing\_company\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
AccountType	Category	Import_Organization
AssignedTo	Assigned To	Import_Organization
BusinessType	Business Type	Import_Organization
ClientName	Name	Import_Organization
ClientNumber	Client Number	Client Master
CorpType	Corporation Type	Client Master
DateOfFirstPayroll	Date of 1st Payroll	Client Master
DBA		
DescrOfOps	Description of Operations	Client Master
EffDate	Contract Effective Date	Client Master
Fax		
FEIN	EIN	Import_Organization
NAICS	NAICS Code	Import_Organization
Start Date	Date of Incorporation	Client Master
Status		

## Department

## HCMAPI\_ongoing\_department\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	<b>ClientSpace Dataform Source</b>
DepartmentCode	Department Code	Department Code
DepartmentName	Department Name	Department Code

### Division

## HCMAPI\_ongoing\_division\*.csv

File Column Name	ClientSpace Dataform Field Name	<b>ClientSpace Dataform Source</b>
Address1	Address 1	Division Code
Address2	Address 2	Division Code
City	City	Division Code
DivisionCode	Division Code	Division Code
Name	Division Name	Division Code
Phone	Phone	Division Code
State	State	Division Code
Zip	Zip	Division Code

## **Employee**

## HCMAPI\_ongoing\_employee\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
Address1	Address1	Employee
Address2	Address2	Employee
City	City	Employee
County	County	Employee
DOB	DOB	Employee
Email	Work Email	Employee
EmerContactFirstName	First Name	Employee
EmerContactLastName	Last Name	Employee
EmerContactPhone	Home Phone	Employee

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
EmerContactRelationship	Relationship	Employee
Employeeldentifier	Employee Identifier	Employee
Ethnicity	Ethnicity	Employee
FirstName	First Name	Employee
Gender	Gender	Employee
LastName	Last Name	Employee
MaritalStatus	Marital Status	Employee
MiddleName	Middle Initial	Employee
MobilePhone	Mobile	Employee
Phone	Phone	Employee
SSN	SSN	Employee
State	State	Employee
Zip	Zip Code	Employee

## **Employment**

## HCMAPI\_ongoing\_employment\*.csv

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
CompensationType	Pay Method	Employment
EEOClass	EEO Classification	Employment
Employee	Employee	Employment
EmploymentStatus	Employment Status	Employment
EmploymentType	Employment Type	Employment
HasDeductions	Has Garnishments?	Employment

File Column Name	ClientSpace Dataform Field Name	ClientSpace Dataform Source
HasDependents	Has Dependents?	Employment
HireDate	Last Hire Date	Employment
HomeDept	Home Dept.	Employment
IsFLSAExempt	Is FLSA Exempt?	Employment
JobTitle	Job Title	Employment
Location	Location	Employment
OriginalHireDate	Original Hire Date	Employment
PayPeriod	Pay Frequency	Employment
PayRate	Hourly Rate	Employment
StandardHours	Standard Hours (per period)	Employment
Status		
TermDate	Termination Date	Employment
TermReason	Reason for Termination	Employment
WorkState	SUTA State	Employment

## Job

## HCMAPI\_ongoing\_job\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	ClientSpace Dataform Source
JobCode	Job Code	Job Code
JobDescription	Job Class	Job Code
JobName	Job Name	Job Code

#### Location

### HCMAPI\_ongoing\_location\*.csv

File Column Name	<b>ClientSpace Dataform Field Name</b>	<b>ClientSpace Dataform Source</b>
Address1	Addr1	Client Location
Address2	Addr2	Client Location
ArchivedOn		
City	City	Client Location
LocationCode	Location Code	Client Location
LocationName	Location Name	Client Location
State	State	Client Location
Zip	Zip Code	Client Location

### **Related Topics:**

- ClientSpace Data Mapping for the HCM Ongoing Import API
- Importing to ClientSpace from HCM Using Initial Import Sync
- Importing to ClientSpace from HCM Using Ongoing Import
- HCM Import Subscription Processing

## Salesforce API

The Salesforce API provides two-way communication between the Sales processes in ClientSpace and Salesforce.

## Salesforce API: Extended Overview

This topic provides an overview of ClientSpace Salesforce API functionality and answers some frequently asked questions about the ClientSpace Salesforce API.

If you have specific questions about the ClientSpace Salesforce API or would like to work with us to create a custom ClientSpace Salesforce integration, log an Extranet case.

#### What Does the Salesforce API Do?

The Salesforce API is a two-way communication between the Sales processes in ClientSpace and Salesforce. It is customized to your business needs by PrismHR. It maintains data synchronization between a client's ClientSpace installation and their respective Salesforce system.

**Note:** A one-way configuration option is also available where you only export data to Salesforce from ClientSpace OR import data to ClientSpace from Salesforce.

If you implement the two-way configuration option, Salesforce sends **Accounts**, **Opportunities** and **Contacts** from Salesforce to ClientSpace at a specified **Salesforce Stage**.



ClientSpace uses this information to create **Organizations**, **Workspaces** and **Contacts** in ClientSpace. ClientSpace then sends Organizations, Workspaces and Contacts information back to Salesforce (primarily to make Salesforce status updates).

For a more detailed overview of the data relationships between Salesforce and ClientSpace, see Salesforce API Data Relationships Overview.

Throughout the implementation, we reference common Salesforce terms such as **Stage**, **Account**, **Opportunity**, **Object**, and **Flow**. If you are new to Salesforce or just need a refresher, check out the Salesforce Terms topic. In this topic, we provide definitions of the Salesforce terms and list the comparable ClientSpace terms.

### Understanding How the Salesforce API Supports the Deal Life Cycle

During the life cycle of a deal, either Salesforce or ClientSpace is responsible for the data. Typically, Salesforce owns the data in the Lead Discovery Cycle. 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.

When ClientSpace dataforms (**gen**\_) are updated from Salesforce, they are saved using Dataform Pipeline Logic, which executes business rules and triggers email templates.

### What is Required to Implement the Salesforce API?

You initiate the process by creating a case in the Extranet indicating that you are interested in the Salesforce API. If you decide to proceed, a 16 hour project is created and assigned to a ClientSpace team member who will assist you with the implementation. This kicks off the implementation period which is broken into four phases.

### **Defining the Four Implementation Phases**

In Phase 1, we ask you a series of questions to help us customize the implementation for your company. In Phase 2, we assist you in performing the Salesforce setup steps. In Phase 3, we complete ClientSpace setup steps. Finally, in Phase 4, we guide you in testing the integration and performing some cleanup steps after testing is complete.

Review the primary steps of each implementation phase in the image below:

### PHASE 1 Initial Prep

- Determine if this will be a standard two-way interface or a one-way interface.
- Identify tables and fields to map.
- Identify your company's Salesforce expert.
- Identify the Salesforce Stage at which we bring data over to ClientSpace.
- Identify workflows requiring adjustment.
- Identify stakeholders and others that need to be looped in and determine when that should occur.

### PHASE 2 Salesforce Setup

- Create Work Queue Object.
- Create Flow to generate a Work Queue item when an Opportunity, Account, or Contact reaches the Stage determined in Stage 1.
- Setup "ClientSpace Integration" Connected App.
- Verify that Salesforce Sales Team Members emails match in Salesforce and ClientSpace.
- Delete queue records.
- Create test Account,
   Opportunity and Contact named "zzPrism".
- Send code names of fields to ClientSpace team.

### PHASE 3 ClientSpace Setup

- Add a new Salesforce API configuration.
- Add Salesforce mapping.
- Add Salesforce pipeline to Email Templates, Workflow Channels, and Business Rules as necessary.
- Add a new Salesforce user.
- Add a Salesforce API log report.

### PHASE 4 Testing

- Turn on Salesforce Sync Rest API Scheduled Process in ClientSpace.
- Manually create the Work Queue for "zzPrismHR" Account, Opportunity and Contact created in Stage 2.
- When testing is completed successfully, turn off the Salesforce Sync Scheduled Process.

## What Are the Basic Fields that Can Be Mapped from Salesforce to ClientSpace?

The table below lists the basic fields that can be mapped from Salesforce to ClientSpace.

Salesforce		ClientSpace	
Technical Field Name Salesforce API Path object		Field Label	Field Name
		Organization Dataform	
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

Salesforce		ClientSpace	
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
		Org Oth	er Info Dataform
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 Dataform	
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 I	Waster Dataform
		SIC Code	luAltIndustryCode
		Activation Date	StartDate
sfAcct.ParentId	Account/	Parent Company	fkParentCompanyID

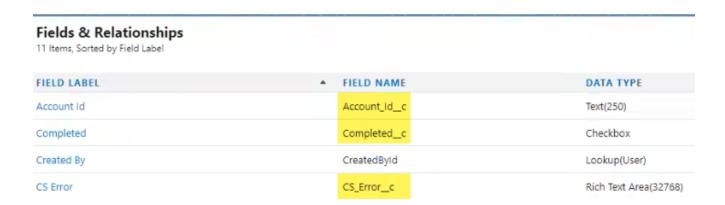
Salesforce		ClientSpace	
		Kill Reason	luKillReason
sfOppty.Descriptions	Opportunities/	Description of Operations	Description of Operations
sfOppty.StageName	Opportunities/	Status	Status
		gen_ClientTeam	
sfOppty.Owner	Opportunities/	Sales Respresentative	fkSalesRepUserID

### Can I Map Custom Fields?

The ClientSpace Salesforce API allows you to connect custom Salesforce fields to fields in ClientSpace, allowing you to implement an API unique to your business. 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.

We will work with you to make sure that the fields required for your business needs are mapped appropriately.

Note: In Salesforce, "\_c" is added to the end of the Field Name to indicate that it is a custom field:



### Which Fields in ClientSpace Can Be Configured to Trigger an Export to Salesforce?

The following table lists the fields that can <u>trigger</u> an export from ClientSpace to Salesforce. These fields are used to trigger a ClientSpace workflow (i.e., automation) that exports to Salesforce when a value in the ClientSpace field listed below is changed. For the default PEO procedure (**peo\_salesforce\_s\_ available\_cs\_updates**), these fields and the associated system objects are as follows.

<b>Associated System Objects</b>	Fields	
Org Trigger	<ul> <li>Name</li> <li>AKA</li> <li>Phone</li> <li>Fax</li> <li>crStatus</li> <li>Address1</li> <li>Address2</li> <li>City</li> <li>State</li> <li>PostalCode</li> </ul>	<ul> <li>Country</li> <li>luCurrentPEO</li> <li>crSource</li> <li>crBusinessType</li> <li>Website</li> <li>IndustryCode</li> <li>EmployerIDNumber</li> <li>crCategory</li> <li>DoNotCallp</li> </ul>
Org Other Info Trigger	EmployeeCount	Gross Payroll
Contact Trigger	<ul> <li>fkOrganization</li> <li>fkAssignedToUserID</li> <li>FirstName</li> <li>LastName</li> <li>Title</li> <li>Category</li> <li>BusinessPhone</li> <li>Email1</li> </ul>	<ul> <li>CellPhone</li> <li>Fax</li> <li>Address1</li> <li>City</li> <li>State</li> <li>PostalCode</li> <li>Country</li> <li>Active</li> </ul>
Client Master Trigger	<ul> <li>ClientNumber</li> <li>Status</li> <li>Dateof1stPayroll</li> <li>CongractEffectiveDate</li> <li>CorportationType</li> </ul>	<ul><li>luAltIndustryCode</li><li>SalesRegion</li><li>fkParentCompanyID</li><li>luKillReason</li></ul>
Incident Trigger Fields (Task)*	• Status	
ContactManagementNote	• Notes	
Manual Sync	Sync with Prism HR     option on Client Master	• SFManualSync

\* Tasks in ClientSpace can be created by Salesforce task records from a Salesforce import. (See the Process Overview diagram for details.) If one of the ClientSpace tasks that was imported from Salesforce has a status change, it can trigger a Salesforce export.

#### Other FAQs

Here are some other frequently asked questions that our customers have about the ClientSpace Salesforce Integration.

#### What Is a "Salesforce Expert"?

Earlier in this topic when we listed the primary steps in the four implementation phases of the ClientSpace Salesforce API, we mentioned that in Phase 1 (Initial Prep), we will identify your company's Salesforce Expert. As it relates to the implementation, a Salesforce Expert is someone at your company with the expertise, access permissions, and availability to work with us as a resource during the implementation period (especially during Phase 2 (Salesforce Setup). This can be your Salesforce Admin or another person with the access permissions and knowledge to assist. The resource must be able to perform tasks such as adding new fields or accounts as needed and participate in testing the interface.

SeeSalesforce API Implementation in Salesforce (Implementation Phase 2) for details of the specific steps we ask the Salesforce Expert to perform.

### What Format Do We Use to Provide the List of Fields to Map to the ClientSpace Team?

We recommend listing your fields in a new Excel Workbook and adding a tab for each Salesforce Object that you would like to map to ClientSpace with columns on each tab for **Field Name**, **Code Name**, and **Field Type**.

See Best Practices and Tips: Creating the Salesforce List of Fields to Map.

#### Do You Import All Salesforce Contacts into ClientSpace?

Your company decides which contacts are imported into ClientSpace. For instance, we can bring over all contacts, the primary contact only, or no contacts at all.

# **Related Topics:**

- Salesforce API Data Relationships Overview
- Importing Salesforce Data Overview
- Exporting Salesforce Data Overview
- Salesforce Terms
- Salesforce API Implementation in Salesforce (Implementation Phase 2)
- Salesforce API Implementation in ClientSpace (Implementation Phase 3)
- Salesforce API Testing (Implementation Phase 4)

#### Salesforce Terms

This topic defines some common Salesforce terms related to the ClientSpace Salesforce Integration and the comparable terms in ClientSpace.

- Account In Salesforce, an Account is an organization, company, or consumer that you want to track - for example, a customer, partner, or competitor. In ClientSpace, this is similar to a Client, Organization, or Workspace.
- **Opportunity** In Salesforce, an **Opportunity**tracks your sales and pending deals. In ClientSpace, this is similar to a **Lead** or **Organization**.
- **Contacts** In Salesforce, **Contacts** are the individuals associated with your accounts. **Contacts** is a term also used in ClientSpace and it has a similar meaning.
- **Stage** In Salesforce, what is referred to as a **Stage** is the same as a **Status** in ClientSpace. Examples include Lead, Client, Terminated, etc.
- **Object** In Salesforce, an **Object** allows you to store information for your Salesforce organization. This is similar to a **Dataform** or **Table** in ClientSpace.
- **Flow** In Salesforce, a **Flow** allows you to build a business automation, such as sending an email, inserting, updating or deleting data, and much more. The automation is configured to trigger based on an event. In ClientSpace, we call this a **Workflow**.

# **Related Topics:**

Salesforce API: Extended Overview

# Salesforce API Implementation in Salesforce (Implementation Phase 2)

In this topic we cover the details of the major steps required for the Salesforce Setup phase of the Salesforce API implementation. In this phase, we work closely with your company's designated Salesforce expert, asking them to perform the steps outlined here and assisting as needed.

# Step 1: Request Access to a Sandbox Environment

If you prefer to test the implementation in a sandbox environment instead of in Production, create a case with SalesForce.com to request access to a sandbox environment. We can use this environment for testing before we finalize the production environment settings or we can test directly in the production environment using a test account, opportunity, and contract.

# Step 2: Create the Work Queue Object

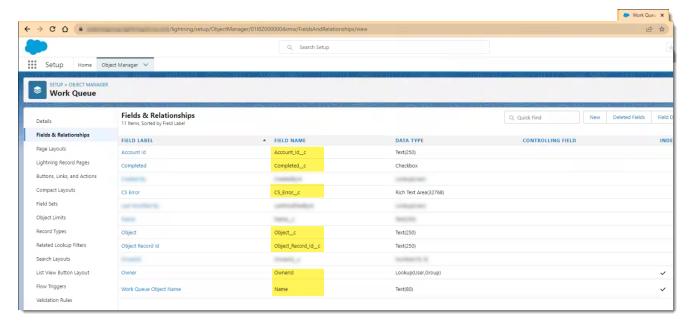
The Work Queue object is monitored by ClientSpace for new updates. Create a new object named Work Queue with the following fields.

**Note:** " c" at the end of the field name indicates that it is a custom field.

Field Name	Notes
Account_ID_c	This is the 18 character ID of associated Account. Every Work Queue record must have an Account.
Object_c	This is the name of the Object for the record specified by the Object Record ID field. Account, Opportunity or Contact.
Object_Record_ID_c	This is the 18 character ID of the associated Object.
CS_Error_c	Leave empty.
Completed_c	Default to False (unchecked) upon record creation. ClientSpace will handle setting this field once the Work Queue record is processed.
Ownerld	The Salesforce Owner Id for this Object. Not used but must be available. Leave empty.
Name	Name of the company (if this is a Lead Object). This is a text field.  Not used but must be available. Leave empty.

Refer to the image below to review an example Work Queue with the fields added.

**Note:** Only add the highlighted fields. Do not add any other fields unless instructed to by the ClientSpace team member assisting you with the implementation.



# Step 3: Create the Work Queue Object Flow

Create a flow to generate a Work Queue object when Opportunity , Account, or Contact reaches a certain stage.

**Note:** The Salesforce stage that triggers the Flow is determined during the first implementation phase (Phase 1: Initial Prep). See the Defining the Four Implementation Phases section in the Salesforce API: Extended Overview for details.

# Step 4: Create a Salesforce User

When you set up the Salesforce User:

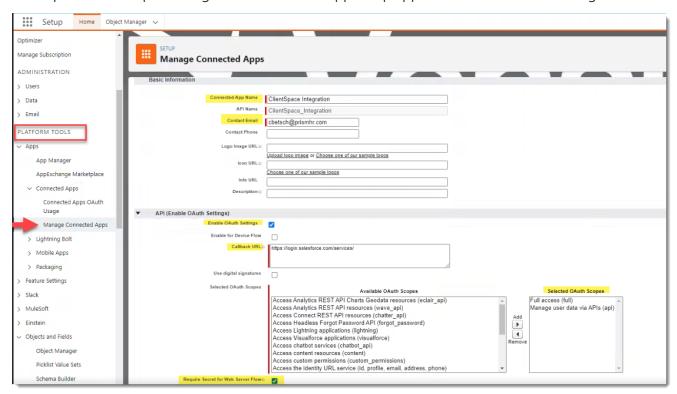
- Set it up so that the password never expires. If you do not do this, the API user could be locked out.
- Set the user as a ClientSpace team member at first. Then, after testing is complete, move the user to a client's member account.
- Verify that the Salesforce User has access to every field being imported into Salesforce.

# Step 5: Set Up the ClientSpace Integration Connected App/Obtain the Consumer Key and Consumer Key Tokens

Add a Connected App named ClientSpace Integration, and complete the following fields:

Field Name	Value
Connected App Name	ClientSpace Integration
Contact Email	Enter the contact email address provided to you by the ClientSpace team member assisting you with configuration.
Enable OAuth Settings	Checked
Callback URL	https://login.salesforce.com/services/
Selected Oauth Scopes	Full access (full) Manage user data via APIs (api)
Require Secret for Web Server Flow	Checked
Require Secret for Refresh Token Flow	Checked

# A completed ClientSpace Integration Connected App setup appears similar to the following:



Also remember to obtain the **Consumer Key** and **Consumer Secret** tokens for the App from Manage Connected Apps. Provide this information to the ClientSpace team member who is assisting you with the implementation. This information is added to the Salesforce API Configuration Parameters in implementation Phase 3 (ClientSpace Setup). See Additional Salesforce Parameters.

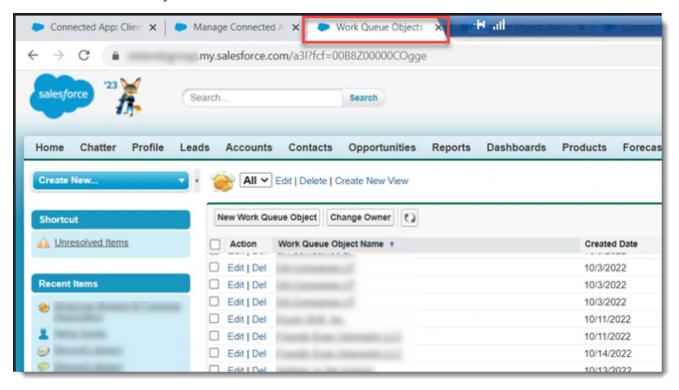
If you need to come back to the Connected App configuration later to obtain the tokens, see Finding the Consumer Key and Consumer Secret for steps.

# Step 6: Verify Email Addresses

Ensure the Salesforce Sales Team members' emails are the same in ClientSpace and Salesforce.

# Step 7: Clean Up Work Queue Records

On the Work Queue Objects tab, delete the Work Queue records.



### **Step 8: Create Test Opportunity and Account**

Create a test **Opportunity** and **Account** called "zz Prismhr".

### Step 9: Provide the "Fields to Map" List

If you have not done so already, provide the list of fields you want to map from Salesforce to ClientSpace to the ClientSpace team member assisting you with the implementation. This should

include any basic fields listed in the Salesforce API: Extended Overview topic as well as any custom fields you want to include.

We recommend listing your fields in a new Excel Workbook and adding a tab for each Salesforce Object that you would like to map to ClientSpace with columns on each tab for **Field Name**, **Code Name**, and **Field Type**.

See Best Practices and Tips: Creating the Salesforce List of Fields to Map.

# Step 10: Identify Sales Flows Requiring Adjustment or Removal

A helpful tip for organizing flows is to create a list of flows and append an asterisk (\*) after the item name to indicate a new flow. Similarly append a pound sign (#) after the item name of old flows requiring removal.

If any flows require the addition of fields, you must create additional objects for them and give the correct permissions to the ClientSpace User in Salesforce. These new fields must also be provided to the ClientSpace team member assisting with your implementation for mapping.

**ALERT:** Use caution when adding new objects for new fields and providing a list of fields to map as adding an incorrect field to the mapping will stop the Salesforce API from working.

# **Related Topics:**

- Salesforce API: Extended Overview
- Finding the Consumer Key and Consumer Secret

# Finding the Consumer Key and Consumer Secret

The Consumer Key and Consumer Secret are Salesforce tokens that must be specified in the Additional parameters section of the Salesforce API Configuration in ClientSpace. See Additional Salesforce Parameters.

The client should provide these to the ClientSpace team member assisting with the Salesforce API configuration. They are located on the Connected App record.

#### **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 where 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.

# **Related Topics:**

- Salesforce API Implementation in Salesforce (Implementation Phase 2)
- Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# Salesforce API Implementation in ClientSpace (Implementation Phase 3)

In this topic we cover the details of the major steps required for the ClientSpace Setup phase of the Salesforce API implementation. Many of these steps are performed solely by the ClientSpace team member assigned to your implementation. The team member may request client collaboration for some steps.

# Step 1: Complete Salesforce API Configuration in ClientSpace

See the following topics:

- Configuring the Salesforce API in ClientSpace
- Configuring Salesforce Enhanced Error Logging with Client Master Duplicate Import Validation

# Step 2: Update Import Mappings/Fields

See the following topics:

- Configuring Import/Export Mapping
- Mapping Custom Salesforce Objects

Also see:

- Importing Salesforce Data Overview
- Exporting Salesforce Data Overview
- Salesforce API Data Relationships Overview
- Finding the API Path in Salesforce

# Step 3: Add the Salesforce Pipeline

Add the Salesforce pipeline to any Email Templates, Workflow Channels, and Business Rules as needed.

# Step 4: Create a Salesforce User

Add a Salesforce User record.

See Configuring the Salesforce User.

# Step 5: Create an SFDC API Log BI Report

See Business Intelligence Report: API log.

# **Related Topics:**

Salesforce API: Extended Overview

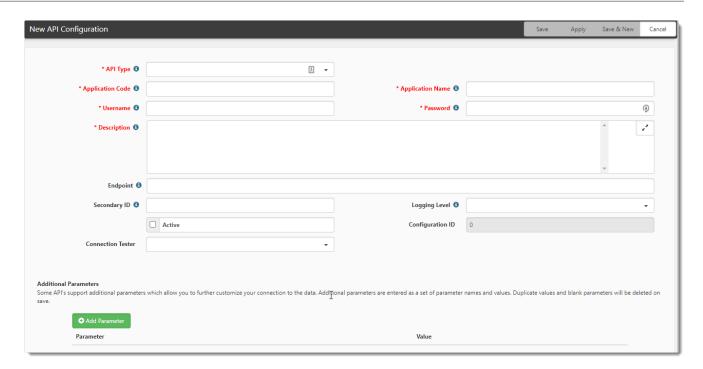
# Configuring the Salesforce API in ClientSpace

In this topic we cover the details of the major steps required for the ClientSpace Setup phase of the Salesforce API implementation. The ClientSpace team member assigned to assist you with the implementation performs many of these steps but may call on a designated person at your company to assist if need.

#### **To configure ClientSpace:**

- Go to System Admin > Advanced > API Configuration.
   The API Configuration dashboard opens.
- 2. Click Add.

The New API Configuration form opens.



# 3. Complete the following fields:

АРІ Туре	Select Web Service.
Application Code	<ul> <li>SFDCDEV is the sandbox configuration</li> <li>SFDCPROD is the Production configuration</li> </ul>
Application Name	Type Salesforce Integration (user choice)
Username	Enter the username of the API account.
Password	Enter the password of the API account. The password is comprised of the password AND the security token.
Description	Provide a description (optional).
Endpoint	Endpoint must be the base OAUTH server. This matches the Callback URL setting in Salesforce.
	<b>Example:</b> https://login.salesforce.com/services/
	<b>Note:</b> You can specify a backup endpoint by configuring the <b>AlternateEndpoint</b> parameter in the <b>Additional Parameters</b> section of the API Configuration form.

Secondary ID	Not used. Leave blank.
Logging Level	<ul> <li>• 0 None</li> <li>• 1 Only logs that the process ran and the date/time begin and end</li> <li>• 2 Logs process details and results (for setup and debugging only)</li> </ul>
Active	Checked by default.
Configuration ID	Auto-fills. No data entry required.
Connection Tester	Select ClientSpace.Core.DataAccess.SalesforceConnectionTester and Save or Apply to display the Test Connection button.
Connection Tester	Select ClientSpace.Core.DataAccess.SalesforceConnectionTester.  Note: This field works in tandem with the Test Connection button. Once configuration of the Salesforce API is completed, if the Connection Tester field is set to ClientSpace.Core.DataAccess.SalesforceConnectionTester, clicking Test Connection initiates an attempt to connect to the API and either returns a "Connected Successfully" message or an "Unable to connect" message. The "Unable to connect" message details list the missing parameters contributing to the failure to connect.

4. Add **Additional Parameters**. Click **Add Parameter** to add a new row to the Additional Parameters section if the parameter is not already listed.

**Note:** Additional Parameters are semi-colon delimited name=value pairs, such as *param1=value1;param2=value2*. Spaces between parameters are not allowed.

**Example:** "; < space > param2 = " is invalid.

Refer to Additional Salesforce Parameters for the complete list of available parameters.

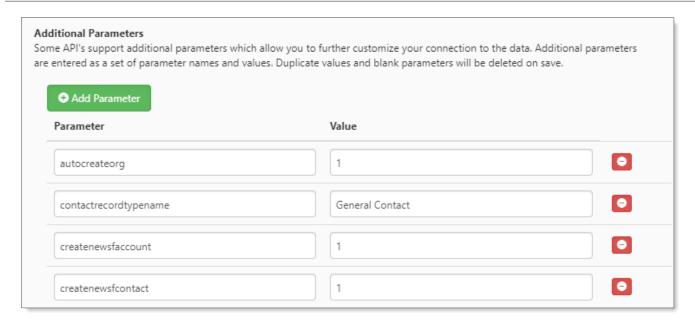
5. Click Apply Save.

### **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

#### **Additional Salesforce 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
AdditionalInsertExportList	Specify which ClientSpace forms are allowed to be inserted into Salesforce. Add the form names (table names) to the <b>Value</b> field, separating them by a semicolon if there is more than one. See Mapping Custom Salesforce Objects for detailed configuration steps on setting up the ClientSpace to Salesforce export.
AlternateEndpoint	Specify an endpoint URL as a backup to the value shown in the <b>Endpoint</b> field. If the original endpoint is broken and an alternate endpoint is specified, when you click the <b>View in Salesforce</b> link on an Organization record, you navigate to the alternate URL instead of the URL entered in the <b>Endpoint</b> field.
autocreateorg	<ul> <li>1 = Automatically create an Organization record in Salesforce when a new Organization is added in ClientSpace.</li> <li>0 = Do no automatically create an Organization record in Salesforce when a new Organization is added in ClientSpace.</li> </ul>

Parameter	Value description
consumerkey	This is the key (i.e., token) that ClientSpace (the consumer) uses to identify itself to Salesforce.
	<b>Note:</b> This key is provided to the ClientSpace team member assisting with the Salesforce API implementation by the client's Salesforce expert who has been designated to assist with the implementation. The key comes from the ClientSpace Integration Connected App setup in Salesforce. See Step 5 of Salesforce API Implementation in Salesforce (Implementation Phase 2) or Finding the Consumer Key and Consumer Secret for details.
consumersecret	This is the key (i.e., token) that ClientSpace (the consumer) uses to establish ownership of the consumer key.
	<b>Note:</b> This key is provided to the ClientSpace team member assisting with the Salesforce API implementation by the client's Salesforce expert who has been designated to assist with the implementation. The key comes from the ClientSpace Integration Connected App setup in Salesforce. See Step 5 of Salesforce API Implementation in Salesforce (Implementation Phase 2) or Finding the Consumer Key and Consumer Secret for details.
csavailableupdates	This procedure determines which ClientSpace changes are able to trigger an export (defaults to <b>peo_salesforce_s_available_cs_updates</b> ). These must have associated Audit configurations in the Field Change Audit table.

Parameter	Value description	
csinstance	This parameter supports ClientSpace sites using multiple instance of ClientSpace with a single Salesforce instance. Add the parame to each instance of ClientSpace and enter the name of the instance in the <b>Value</b> field. <b>EX:</b> CS1 for the first instance, CS2 for a second instance, and so forth.	
	<b>Note:</b> You must also configure a new Work Queue field in Salesforce (setup by Salesforce Administrator) named <b>CS_Instance</b> to hold the instance value for each instance. Two underscores, followed by "c" are added by Salesforce once you save the field name, resulting in a field named <b>CS_Instancec</b> .	
csworkspacedataproc	This procedure exports workspace data (defaults to peo_salesforce_org_s_workspace_by_org).  Contact ClientSpace Professional Services about using this parameter with a custom stored procedure. With this parameter and a custom stored procedure, you can define variables to pull data from fields in multiforms and map that data to fields in Salesforce. For example, you can edit the import map header for the Salesforce export and add fields to the import map header detail.  See the Configure the Import Map Detail for Fields from Multiforms section in Configuring Import/Export Mapping for more information.	
csupdateproc	This procedure sets _CSUpdateAllowed (defaults to peo_ salesforce_s_allow_cs_update). This procedure determines when ClientSpace will begin ignoring Salesforce.	
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 <i>abc</i> , 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."</userid>	

Parameter	Value description	
exporttosf	<ul> <li>0 = No Export         (ClientSpace changes are not exported to Salesforce) defaults to</li> <li>0</li> <li>1 = Export to and Import from Salesforce</li> </ul>	
IgnoreWorkQueueErrors	<ul> <li>Allows the admin to ignore work queue failures and mark them as completed, so they are not reprocessed.</li> <li>Value of 0 or 1, defaults to 0.</li> <li>Only applies to processing Work Queue records when there is a failure (could not save a form).</li> <li>0: Work Queue record is NOT marked Completed (this is how it has worked in the past).</li> <li>1: Work Queue record IS marked Completed and the WorkQueueErrorFieldName field in Salesforce is updated with the failure log info.</li> <li>Note: If the client is using enhanced Salesforce v3 API error logging to record hard errors in both ClientSpace and the Salesforce Work Queue, the IgnoreWorkQueueErrors field must be set to 1. This prevents the API from attempting to re-import a Work Queue item and create a duplicate in ClientSpace.</li> </ul>	
	This requires configuration in both ClientSpace and Salesforce. See Configuring Salesforce Enhanced Error Logging with Client Master Duplicate Import Validation for configuration details.	
importfromsf	<ul> <li>0=Import data from Salesforce.</li> <li>1 = Do not export data from Salesforce.</li> <li>Note: If exporttosf (export to and from Salesforce) is set to 1, this parameter is not needed. importfromsf is for one-way API configuration only.</li> </ul>	
querysize	1000 (must be this value)	
querybatchsize	-1 (must be this value)	
restversion	This is the Salesforce REST application version. Must be provided by the client.	
sessionlength	29 (must be this value)	

Parameter	Value description
timezoneoffset	This parameter is used to adjust for UTC time difference between the client time zone and Salesforce time, which is GMT time. It adjusts imported and exported dates <u>and</u> times to match the Salesforce DateTime and the client timezone DateTime as appropriate.  • <b>0</b> : Passes the value as is.  • -n: Subtract hours. For example, to subtract 5 hours, specify – <b>5</b> .
	<ul> <li>n: Add hours. For example, to add 5 hours, specify 5.</li> <li>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.</li> </ul>
	EX 1 - timezoneoffset is a positive number: If timezoneoffset = 5 in ClientSpace, ClientSpace adds 5 hours to the time on import and subtracts 5 hours from the time on export. In this scenario, if the SalesForce DateTime is 7/24/2024 at 10:30 pm, once imported into ClientSpace, the time is recorded as 7/25/2024 at 3:30 am.  Likewise, if the time is 7/24/2024 at 10:30 pm in ClientSpace, once exported to Salesforce, the time is 7/23/2024 at 3:30 am.
	<b>EX 2 - timezoneoffset is a negative number:</b> If timezoneoffset = -5 in ClientSpace, ClientSpace <u>subtracts</u> 5 hours from the time on import and <u>adds</u> 5 hours to the time on export. In this scenario, if the SalesForce DateTime is <b>7/24/2024</b> at <b>10:30 pm</b> , once imported into ClientSpace, the time is recorded as <b>7/24/2024</b> at <b>5:30 pm</b> . Likewise, if the time is <b>7/24/2024</b> at <b>10:30 pm</b> in ClientSpace, once exported to Salesforce, the time is <b>7/25/2024</b> at <b>3:30 am</b> .
	<b>Note:</b> You must adjust timezoneoffset parameter to account for Daylight Savings Time (DST), if DST is applicable in the client time zone.

Parameter	Value description	
updatestage	<ul> <li>0= Opportunity Stage is never updated</li> <li>1 = Opportunity Stage is updated when (defaults to 1). Note: Export is based on stage.</li> </ul>	exporting.
	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.	
	<b>ClientSpace Client Master status</b>	Stage name
	Prospect	Pricing
	Submitted	Pricing
	Accepted	Pricing
	Underwriting	Proposal
	PricingApproved	Proposal
	Approved	Negotiation
	ContractPending	Negotiation
	Negotiation	Negotiation
	UnderContract (Onboarding)	Closed Won
	PendingActivation	Closed Won
	Terminated	Closed Won
	Dead	Closed Lost
	Expired	Closed Lost
updateworkspacename	<ul> <li>O: Workspace name in ClientSpace is not updated when the Work Queue record includes a change to the Organization name. The system only updates the Organization name in ClientSpace.</li> <li>1: Workspace name and Organization name in ClientSpace are updated when the Work Queue record includes a change to the Organization name.</li> </ul>	

Parameter	Value description
version	3 (must be this value)

Parameter	Value description
WorkQueueErrorFieldName	Allows the admin to configure a custom field in Salesforce Work Queue item to capture API errors.
	This error is stored in the designated field until the Salesforce Work Queue record is successfully reprocessed (as indicated by a check mark in the <b>Completed</b> checkbox on the <b>Details</b> tab of the Work Queue record). Then, the error message is cleared.
	To implement this parameter, Admin must have the ability to add an available custom field to the work queue object in Salesforce that is available for read/write through the API. This field must be a "Text Rich" field and 100,000 characters in length to preserve log formatting.
	<ul> <li>Value of <fieldname_c> should be the name of the custom work queue record field name. Defaults to "" (empty).</fieldname_c></li> <li>If empty and IgnoreWorkQueueErrors = 1, the Work Queue is</li> </ul>
	<ul> <li>completed, and no error message is sent to Salesforce.</li> <li>If <fieldname_c> and IgnoreWorkQueueErrors = 0, the Work Queue is NOT completed and no error messages are sent to Salesforce.</fieldname_c></li> </ul>
	<ul> <li>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.</fieldname_c></li> <li>Field must be configured in Salesforce and available.</li> </ul>
	Note:
	<ul> <li>If the client is using enhanced Salesforce v3 API error logging to record hard errors in both ClientSpace and the Salesforce Work Queue, set the value of the WorkQueueErrorFieldName to Completed_Errors_c.</li> </ul>
	<ul> <li>"_c" is added automatically by the Salesforce system when a custom field is added. You do not need to add it. Doing so will result in an incorrectly named field of Completed_Errors_c_c.</li> </ul>
	This requires configuration in both ClientSpace and Salesforce. See Configuring Salesforce Enhanced Error Logging with Client Master Duplicate Import Validation for configuration details.

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
	<ul> <li>If this field is <b>not found</b> on the Work Queue, all Work Queue records are retrieved, regardless of the API Config parameter setting.</li> </ul>
	<ul> <li>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.</li> </ul>
	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
	<ul> <li>When this field is <b>not present</b>, all Work Queue records are retrieved.</li> </ul>
	<ul> <li>When this field is present with an empty Value, all Work Queue records are retrieved.</li> </ul>
	<ul> <li>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.</li> </ul>
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).
workspacetemplateguid	Enter the GUID of the template project. When a Workspace is created in ClientSpace, this Workspace Template will be used.

# **Related Topics:**

- Salesforce API Implementation in ClientSpace (Implementation Phase 3)
- Salesforce API Testing (Implementation Phase 4)

# Configuring Salesforce Enhanced Error Logging with Client Master Duplicate Import Validation

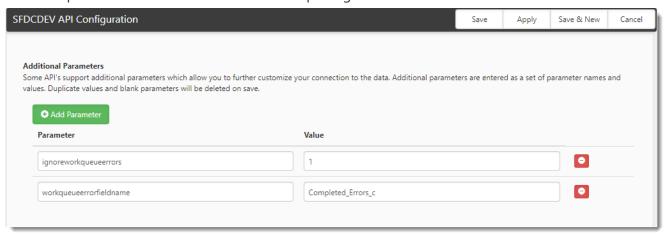
Optionally, configure Salesforce and ClientSpace to log Client Master import hard errors (i.e., failures) on the Salesforce API pipeline to both the ClientSpace Scheduled Process History log and the Salesforce Work Queue. Once this feature is configured, if failures occur, the Work Queue record will be marked Completed and failures are recorded in the Salesforce field configured in the API record as the **workqueueerrorfieldname** parameter. This prevents Client Master records with hard errors from importing into ClientSpace. Since failed records are marked Completed, Salesforce Work Queue errors can be reviewed and corrected and manually marked as not completed in the queue. Then, the work queue records can be processed again with the next scheduled import.

#### In ClientSpace:

- Go to System Admin > Advanced > API Configuration.
   The API Configuration dashboard opens.
- 2. Select the Salesforce API record and click **Edit**. (**SFDCDEV** is the sandbox configuration and **SFDCPROD** is the Production configuration.)

The API Configuration form opens.

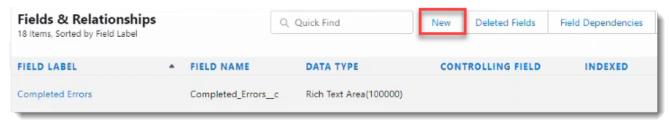
4. Add or update the two **Parameter** and **Value** pairings shown:



5. Click Apply or Save.

#### In Salesforce:

- 1. On the **Work Queues** tab, navigate to **Setup** > **Edit Object**.
- 2. In the Details panel, select Fields & Relationships.
- 3. Click **New** and add a custom field with the **Field Label**, **Field Name**, and **Data Type** pairings shown to the Custom Field Definition window.



4. To change the **Data Type** to Rich Text Area, click **Change Field Type** on the Custom Field Definition window and select the option. Also be certain to set a minimum field length of 100,000 characters, not to exceed the maximum character allowance of 131,072.



5. Click Save.

# **Related Topics:**

- Salesforce API Implementation in ClientSpace (Implementation Phase 3)
- Additional Salesforce Parameters

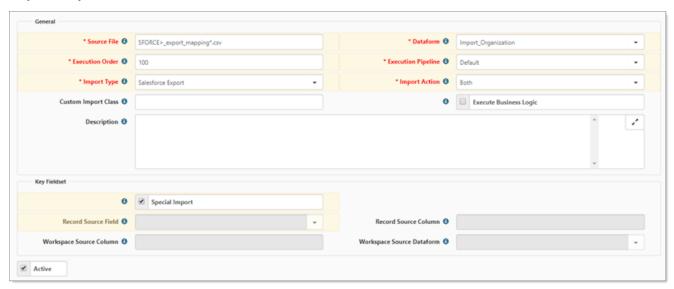
# Configuring Import/Export Mapping

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

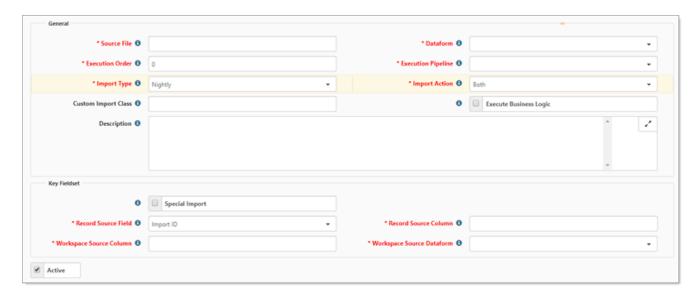
# **Import Map Header**

Use Import Map Headers to map data between ClientSpace and Salesforce.

# To create the Import Map Header:

- 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.
- 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	<ul> <li>This is where the data from Salesforce will be stored. Select any non-parent field type on any single-form.</li> <li>When mapping <b>Organization</b>, select <b>Import_Organization</b> project type.</li> <li>When mapping <b>Contact</b>, select <b>Import_Contact</b> project type.</li> </ul>
API Path	<ul> <li>This is where the data from Salesforce will be retrieved. The format of this field is SF_ObjectType/FieldName (e.g., Account/BillingStreet).</li> <li>The only valid SF_ObjectType values are Opportunity, Account, Contact, Lead, Event, or Task. Other values are ignored.</li> <li>Can only contain an SF_ObjectType and up to two subfields, as in Account/RecordType/Name.</li> <li>Cannot contain special characters (other than '/') and no spaces.</li> <li>Salesforce fields that are Calculated are not exported by ClientSpace because Salesforce does not allow them to be directly updated.</li> <li>For details on locating the API Path, see Finding the API Path in Salesforce.</li> </ul>
Data Type	<ul> <li>Text: Most fields should be mapped as Text (even if the source or destination fields are integers or dates/etc.)</li> <li>Lookup: Not yet implemented (use Text).</li> <li>Foreign Key</li> <li>Currently, this is only implemented for Imports and locating CS Users.</li> <li>It accepts a Salesforce User ID and locates 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.</li> <li>Default Value</li> <li>A Default Value can be set in this field.</li> <li>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.</li> <li>Active, Required Value, and Required Column</li> </ul>

Field	Description
	<ul> <li>Only Active records are used.</li> <li>Required Value and Required Column settings are ignored.</li> <li>Minimum Required Field</li> </ul>

#### 5. Click Save.

# To configure the Import Map Detail for fields from multiforms:

**Note:** Before you complete this procedure, you must contact Professional Services about setting up the Salesforce API to use the csworkspacedataproc additional parameter with a custom stored procedure. You will use the variables from the custom stored procedure to define the fields to populate in Salesforce.

- Go to System Admin > Advanced > Configure Import.
   The system displays the Import Map Header Search page.
- 2. Click (Jump) for the row that contains the Salesforce mapping source file. The system displays the Import Map Header Detail page.
- In Action Items, click Fields.
   The system displays the Import Map Search, showing the existing fields.
- 4. Click **Add** to create a new field map.

# 5. Complete the following information in the form:

Field	Description
File Column	Enter the variable from the stored procedure for the field that you are mapping to Salesforce.
Dataform	This is field <b>must</b> be <b>blank</b> so that the system can pull data by using the variable in the saved procedure that is associated with the Salesforce API csworkspacedataproc additional parameter.
Data Type	<ul> <li>Text: Most fields should be mapped as Text (even if the source or destination fields are integers or dates/etc.)</li> <li>Lookup: Not yet implemented (use Text).</li> <li>Foreign Key <ul> <li>Currently, this is only implemented for Imports and locating CS Users.</li> <li>It accepts a Salesforce User ID and locates 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.</li> </ul> </li> <li>Default Value <ul> <li>A Default Value can be set in this field.</li> <li>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.</li> </ul> </li> <li>Active, Required Value, and Required Column <ul> <li>Only Active records are used.</li> <li>Required Value and Required Column settings are ignored.</li> </ul> </li> <li>Minimum Required Field</li> </ul>
API Path	<ul> <li>This is where the data from Salesforce will be retrieved. The format of this field is SF_ObjectType/FieldName (e.g., Account/BillingStreet).</li> <li>The only valid SF_ObjectType values are Opportunity, Account, Contact, Lead, Event, or Task. Other values are ignored.</li> <li>Can only contain an SF_ObjectType and up to two subfields, as in</li> </ul>

Field	Description
	<ul> <li>Account/RecordType/Name.</li> <li>Cannot contain special characters (other than '/') and no spaces.</li> <li>Salesforce fields that are Calculated are not exported by ClientSpace because Salesforce does not allow them to be directly updated.</li> <li>For details on locating the API Path, see Finding the API Path in Salesforce.</li> </ul>

#### 6. Click Save

# **Related Topics:**

Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# **Mapping Custom Salesforce Objects**

You can use the Salesforce Export API (SFORCE\_export\_mapping\*.csv) to map ClientSpace forms and fields to Salesforce objects and fields and export the data from ClientSpace to Salesforce to create new Salesforce objects.

### Step 1: Verify Datatypes

Before you get started, make sure you verify the datatypes of the fields you want to map in Salesforce and ClientSpace. Mapped fields must have matching datatypes.

- In Salesforce: Go to Setup > Object Manager > Select Object > Fields And Relationships.
- In ClientSpace: Go to **System Admin** > **Advanced** > **Dataform Admin**. Open the dataform and select **Fields**. Hover your mouse pointer over a field in the **Field** column to view the datatype.

#### Step 2: Add the "AdditionalInsertExportList" Parameter to the Salesforce API Record

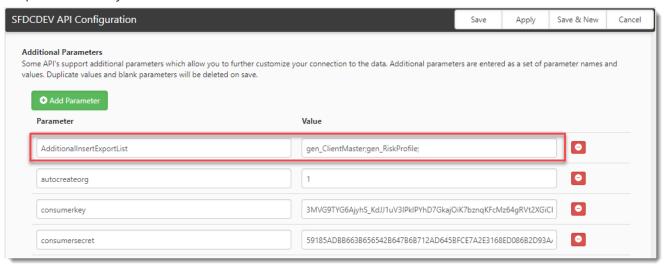
The **AdditionalInsertExportList** parameter must be added to the Salesforce API record (SFDCDEV or SFDCPROD) to specify which ClientSpace forms are allowed to be inserted into Salesforce.

**Note:** In development sites, the Salesforce API name will be SFDCDEV. In production sites, the Salesforce API name will be SFDCPROD.

#### To add the parameter:

Go to System Admin > Advanced > API Configuration.
 The API Configuration dashboard opens.

- 2. Select the Salesforce API record (SFDCDEV or SFDCPROD) and click **Edit**. The API Configuration form opens.
- 3. Add the **Parameter** and add the form names (table names) to the **Value** field as shown below. Separate them by a semicolon if there is more than one.



4. Click Apply or Save.

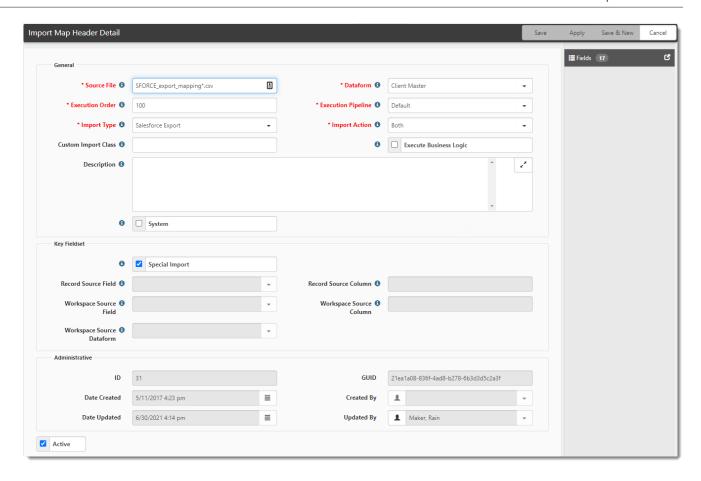
# Step 3: Review Import Map Header Detail of the Salesforce Export API Record

The export process that inserts custom Salesforce objects uses the existing Salesforce Export API (SFORCE\_export\_mapping\*.csv). If you are already using the Salesforce Export API to update Salesforce objects, it will already be configured for you. You can review the API settings and make changes if necessary.

### To review the Salesforce Export API settings:

- Go to System Admin → > Advanced > Configure Import.
   The Import Map Header Search dashboard opens.
- 6. Enter SFORCE in the **Search** field and click **Search**.
- 7. Click (Open) next to SFORCE\_export\_mapping\*.csv or double-click the row.

  The Import Map Header Detail form displays Salesforce Export API configuration as shown in the example below.



- 8. Review the field values. Note that the **Import Type** should be set to Both. For a complete list of field definitions, refer to Configuring the Import Map Header.
- 9. If you made changes, click **Save**.

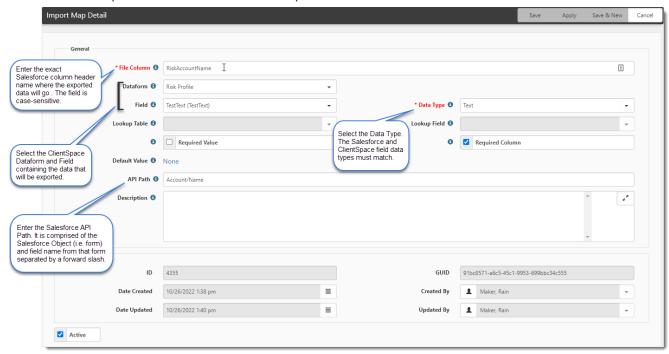
# Step 4: Configure the Import Map Detail Record of the Salesforce Export API Record

In this step, add each field from ClientSpace that you want to send to a Salesforce object (i.e., form) and field.

# To configure the Salesforce Export API mapping:

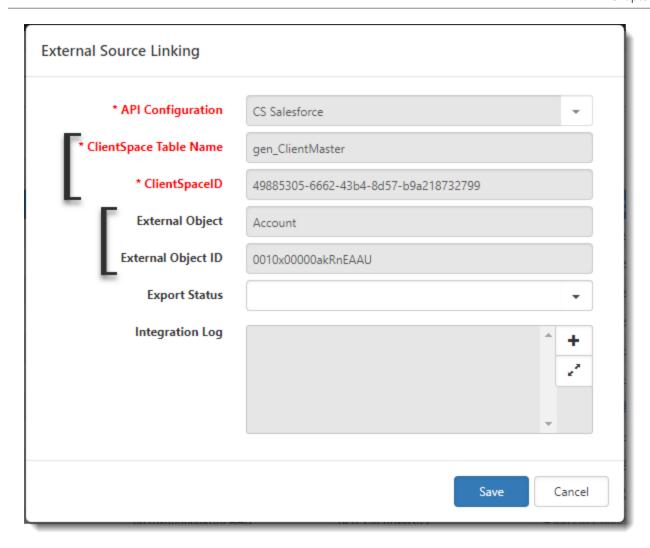
- 1. Open the Salesforce Export API Import Map Header Detail record. (See Step 2 for details.)
- In the right pane, click **Fields**.
   The Import Map Search dashboard opens.
- To add fields, click Add.
   The Import Map Detail form opens.

4. Map the fields as shown in the example image below. Refer to Configuring the Import Map Detail for detailed steps and a list of all field descriptions.



# How the Export Determines Whether to Insert or Update a Salesforce Object

When a change is made to a dataform with mapped fields, an audit record is created containing the change. When the Salesforce Scheduled Process (Salesforce Sync Rest API) runs, ClientSpace uses the External Source Linking table (**System Admin > Imports > External Source Linking**) to determine whether to update or create an object. The External Source Linking dashboard displays a list of all API objects. If you open an External Source Linking record and see entries for both a Clientspace Table Name/ClientSpaceID pair along with an External Object (i.e., Salesforce object)/External Object ID pair, this means that there is already a link between the objects in Salesforce and ClientSpace.



If a change is made on the associated ClientSpace dataform, the audit record contents are used to update the object in Salesforce the next time the scheduled process runs. If no Clientspace Table Name/ClientSpaceID pair and External Object/External Object ID pair are shown on the External Source Linking record, a new object will be inserted using the contents of the audit record the next time the scheduled process runs.

# **Related Topics:**

- Salesforce API Implementation in ClientSpace (Implementation Phase 3)
- External Source Linking

# Importing Salesforce Data Overview

### **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/Parentld 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)

# **Related Topics:**

- External Source Linking
- Exporting Salesforce Data Overview
- Salesforce API Data Relationships Overview

### **Exporting Salesforce Data Overview**

# **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.

# **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# Configuring the Salesforce User

Configure the Salesforce user in ClientSpace.

# To configure the Salesforce user:

- Go to System Admin > Users.
   The Users dashboard opens.
- Click **Add**.The User Details form opens.
- 3. Complete the following fields:

Username	Type <b>sfservice</b> .
First	Type Salesforce.
Last	Type Service User.
Email	Enter the Admin Email address for ClientSpace (Go to <b>System Admin</b> > <b>Advanced</b> > <b>App Settings</b> ).
User Type	Select External.
Authentication Type	Select ClientSpace.
Default Workspace	Select Admin Workspace.
Active	Select this option to enable the username.

#### 4. Click Save.

# **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# Business Intelligence Report: API log

Create a report named **SFDC API Log** with the following settings to capture Salesforce API log data (including any including errors) and put in the **Administration** Category:

Tab	Field/Value	Notes
Fields	<ul><li>Date Create</li><li>ProcessStartTime</li><li>ProcessEndTime</li><li>Error</li><li>LogData</li></ul>	Show Full Date and Time on all Date or Time fields. <b>Example:</b> 1/10/2024 4:57:43 PM
Filters	Date Created <i>In Time Period</i> <b>Today</b> fkScheduledProcessID <i>Equals</i> <b>67</b>	67 in the example is the <b>Scheduled Process ID</b> for Salesforce Sync Rest API. Obtain the ID for your configuration from the record title.
Data Sources	SYSTEM - Scheduled Process History	

# **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# Salesforce API Data Relationships Overview

The Salesforce API Integration is a PEO process that maintains data synchronization between a Client's ClientSpace installation and their respective Salesforce system.

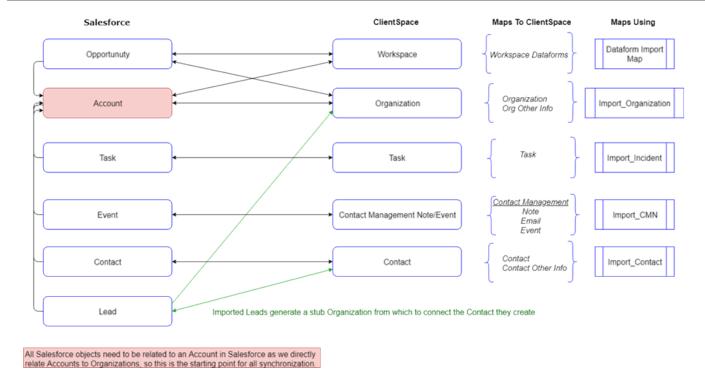
During the life cycle of a Deal, either Salesforce or ClientSpace is responsible for the data. Typically, when in the Lead Discovery cycle, Salesforce owns the data. As changes are made in Salesforce, ClientSpace is updated with those changes. When the Deal has reached a certain level, ClientSpace will 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**

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).



# **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

# Finding the API Path in Salesforce

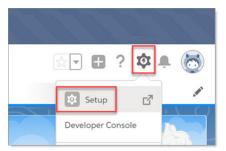
The API Path used to configure the Import Map details in ClientSpace can be found in Salesforce. To view the necessary settings, the Salesforce user must have administrative rights.

## **Use the Lightning Maps to ensure appropriate field naming:**

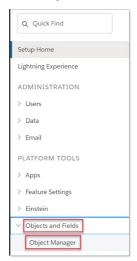
1. Select your *username* > **Switch to Lightning Experience**.



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.



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



# **Related Topics:**

• Salesforce API Implementation in ClientSpace (Implementation Phase 3)

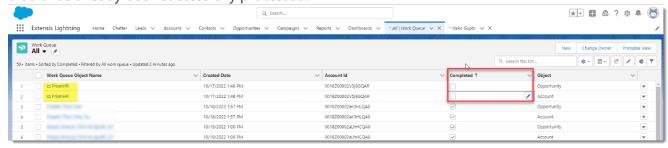
# Salesforce API Testing (Implementation Phase 4)

Testing of the Salesforce API can occur in the Sandbox or in Production. This part of the implementation is completed with the assistance of a ClientSpace team member.

#### To test the Salesforce API:

- When ready to test, turn on the Salesforce Sync Rest API Scheduled Process (System Admin > Advanced > Scheduled Processes).
  - a. On the Scheduled Processes Admin dashboard, click (Open) next to the Salesforce Sync Rest API Scheduled Process.
  - b. If the **Next Run Date** is set to a future date, change it to today's date.
  - c. Save the change and close the scheduled process.
  - d. Then, on the Scheduled Processes Admin dashboard, select the **Salesforce Sync Rest API** Scheduled Process and then click the **Run Process** button.

Manually create the work queue for the "zzPrismHR" test account, opportunity and contract, copy/paste the SalesforceID into the work queue and check to see if records are created.
 Note: If Completed is checked, the record will not be imported into Salesforce as this indicates that it has already been successfully processed:



3. When finished testing, turn off the **Salesforce Sync Rest API** Scheduled Process.

# **Related Topics:**

• Troubleshooting Salesforce API Issues

## Troubleshooting Salesforce API Issues

**Issue 1:** The Salesforce API process is frozen or stuck.

Potential Fix: In ClientSpace, open the Salesforce Sync Rest API Scheduled Process (System Admin > Advanced > Scheduled Processes, uncheck the Is Running checkbox and Save.

**Issue 2:** An access token error not granted error displays in the SFDC API Log report.

**Potential Fix:** Reset the security token in the Salesforce site (**My Personal Information** > **Reset My Security Token**). Then reset the password in the Salesforce site.

**Issue 3:** The following error displays in the SFDC API Log report: "Severe Error occurred; error=Cannot deserialize the currentJSON array (e.g. [1,2,3]) into type

'ClientSpace.API.Salesforce.Rest.DescribeObjectResult' because the type requires a JSON object (e.g. {"name":"value"}) to descrialize correctly."

**Potential Fix:** Reset the username and password in the Salesforce site and in ClientSpace.

# **Related Topics:**

• Salesforce API Testing (Implementation Phase 4)

# 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:

 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.
- 11. Manage any failed uploads.

**What's next?** When you have the username, password, and endpoint information, you can begin configuring the API. Proceed to Configuring the DocuSign API Record.

# Before You Begin

**Note:** 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.

Before you begin the DocuSign configuration, your DocuSign Administrator must obtain the Username.

The ClientSpace staff member assigned to assist you with DocuSign API configuration provides the **Secondary ID** and **Key**. You will need the login information at the end of the API configuration process to authorize the connection from ClientSpace to DocuSign.

The table below lists the information you need before you begin to set up the DocuSign API in ClientSpace.

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 <b>xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</b>
Endpoint	This is the server URL to which we connect. In production environments, this is typically entered as account.docusign.com.
Secondary ID	Integration key provided by the ClientSpace staff member assigned to assist you with DocuSign API configuration.
Key	OAuth2 RSA Key required by DocuSign for all DocuSign API integrations after 12/31/2023. The ClientSpace staff member assisting you with the implementation provides the <b>Key</b> .

# Configuring the DocuSign API Record

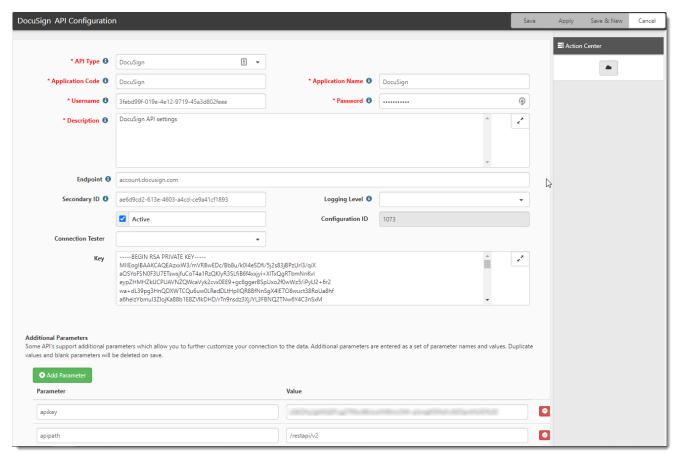
The API record connects ClientSpace to DocuSign. Your DocuSign administrator or a ClientSpace staff member can assist you with DocuSign API configuration.

**Ensure that you have the items marked with an asterisk (\*)** in the table below before you start the configuration. Also see Before You Begin.

## Step 1: Configure the API Record in ClientSpace

## To configure the API record:

- 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 <b>DocuSign</b> .
Application Code	Type <b>DocuSign</b> .
Application Name	Type <b>DocuSign</b> .
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 xxxxxxxxx-xxxx-Mxxx-Nxxx-xxxxxxxxxxx.  Your DocuSign Administrator can obtain the Username from Docusign.com using the following steps:
	<ol> <li>On the Docusign.com site, in the left navigation pane under "Integrations", select <b>Apps and Keys</b>.</li> <li>In the "My Account Information" section, click the <b>Copy to Clipboard</b> icon under <b>User ID</b>.</li> </ol>
	API Account ID  3febd99f-019e-4e12-9719-45a3d802feee  API Account ID  21117c1f-f703-429d-bdcb-6dee719f6a47  Account Base URI https://demo.docusign.n.
	<ol> <li>Paste the DocuSign <b>User ID</b> into the <b>Username</b> field of the ClientSpace DOCUSIGN API Configuration window.</li> </ol>
Description	Provide a brief description of how you are using DocuSign in the ClientSpace environment (i.e. Sales, Benefits, etc.)
Endpoint*	This is the server URL to which we connect. In production environments, this is typically entered as account.docusign.com.
Secondary ID*	Integration key provided by the ClientSpace staff member assigned to assist you with DocuSign API configuration.
Active	Check <b>Active</b> .
Logging Level	Select Level 2 (Verbose). You can also view log details in the Uploaded Files

	Queue. See Viewing and Managing Document Statuses in the DocuSign Process.
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 and Managing Document Statuses in the DocuSign Process.
Key*	OAuth2 RSA Key required by DocuSign for all DocuSign API integrations after 12/31/2023. The ClientSpace staff member assisting you with the implementation provides the <b>Key</b> .
Additional Parameters	The following parameters are name-value pairs for additional configuration.
apipath	Required. Type /restapi/v2.
apikey	Required. This value will be provided by the ClientSpace Professional Services representative assisting you with DocuSign API configuration.
endpoint	Required. Type https://cs-functions-prd.azurewebsites.net/api/DocuSignToken.
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.  • Triggers the DocuSignFail email template.  Default setting for the <b>retrythreshold</b> field is <b>5</b> .  See Viewing and Managing Document Statuses in the DocuSign Process and
RetryCount	Notifying Users of Status.  This is the number of times the system attempts to upload a document in CS Failure or DS Failure status before stopping.
ExcludeVoidedFi les	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.  O: 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.
DocuSignReque stDays	Allows a signed document to be retrieved into ClientSpace by the <b>Docusign Get Docs Status</b> scheduled process if a document status change is equal to or less than the number of days specified here.

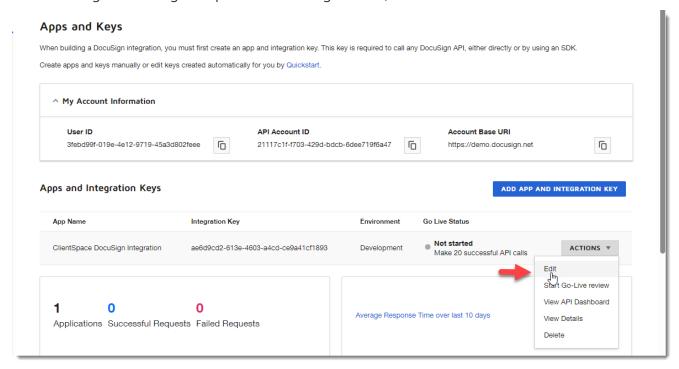
#### 4. Click Save.

# Step 2: Enter the Redirect URI on DocuSign.com

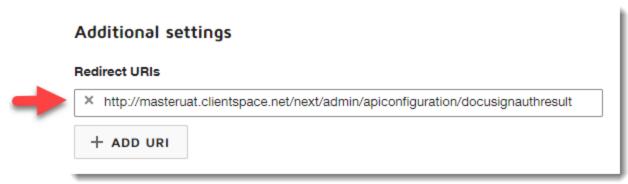
This step must be completed by your DocuSign administrator or by the ClientSpace Professional Services representative assisting you with DocuSign API configuration. The redirect URI must exactly match one of those preregistered for the integration key in your DocuSign account. DocuSign provides the URI.

## To enter a redirect URI:

- 1. On the Docusign.com site, scroll down to the "Service Integration" section on the window containing your Integration Key details.
  - **Note:** If this window is closed, click **Actions** > **Edit** next to the DocuSign integration record on the **Apps and Keys** page under "Apps and Integration Keys". (The **Apps and Keys** page is accessed from the DocuSign.com navigation pane under "Integrations".)



- 2. In the "Additional Settings" section, under **Redirect URIs**, click **Add URI**.
- 3. Type the URI.



**Note:** The URI shown in the example above is for instructional purposes only. Your company's URI, assigned by DocuSign, will be different from the example shown here.

4. **Important:** Click **Save** at the bottom of the page on Docusign.com to save your entry.

## Step 3: Authorize the Connection in ClientSpace

This step must be completed by your DocuSign administrator. The ClientSpace Professional Services representative assisting you with DocuSign API configuration can help you with this step.

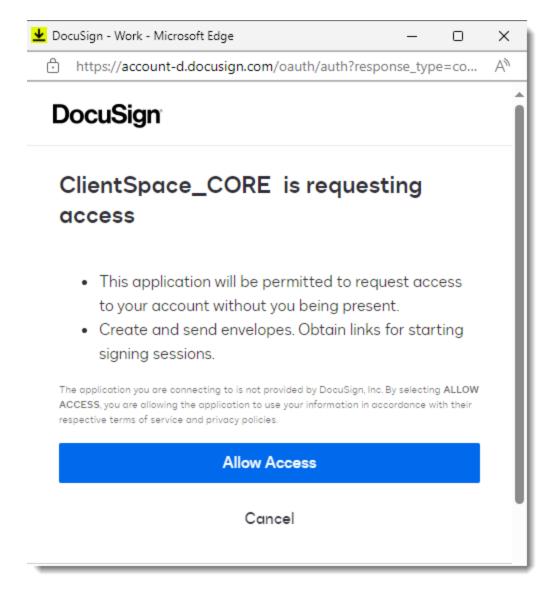
#### To authorize the connection:

- Go to System Admin > Advanced > API Configuration.
   The API Configuration dashboard opens.
- 2. Select the previously saved DocuSign API Configuration record and click Edit.
- 3. In the Action Center, click the **Authorize** icon. A popup window displays requiring you to log in to DocuSign.



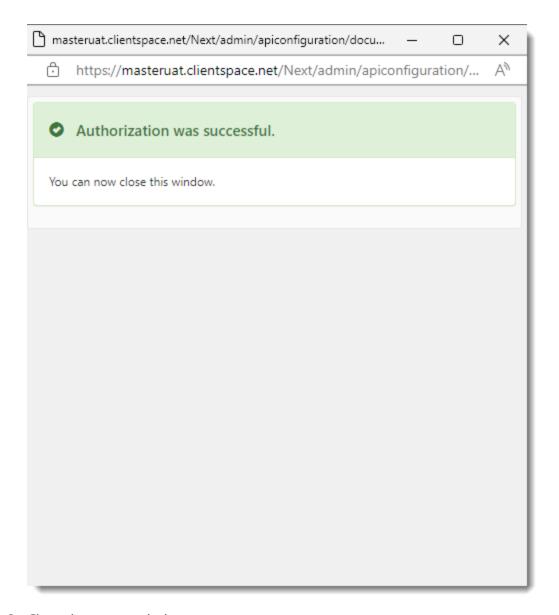
4. Enter the DocuSign password.

The popup window refreshes to display a request for ClientSpace to access DocuSign.



## 5. Click Allow Access.

If the configuration is correct, the popup window refreshes a final time to display an "Authorization was successful" message.



6. Close the popup window.

# Step 4: Test the API Connection in ClientSpace

After you create the API record, it's a good idea to test the connection.

## To test the connection:

- 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.

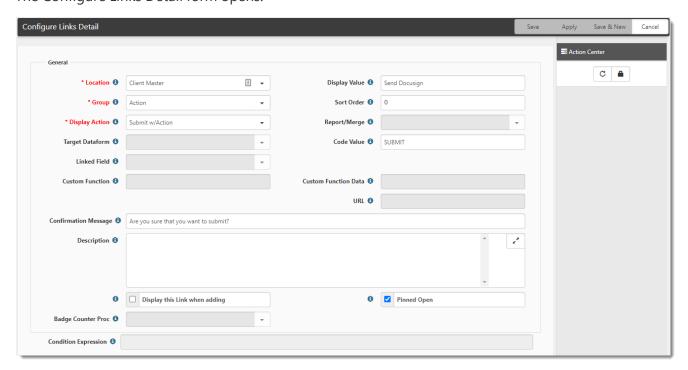
- 3. Select the entry **DocuSign Request Signature** and click **Queue Process**.
- After the process runs, go to System Admin → > Exception Log.
   The Exception Log dashboard opens.
- 5. Look for an entry for the API connection. If there is an error, this means that the API credentials are incorrect, 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:

- Go to System Admin → > Advanced > Custom Links.
   The Configure Links dashboard opens.
- Click Add.The Configure Links Detail form opens.



## 3. Complete the form.

Location	Select <b>Client Master</b> , 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 <b>Send to DocuSign</b> . This is how the link will display in the Action Center > Workflow pane.
Group	Select <b>Action</b> . 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 <b>SendDocuSign</b> . This is the HdrAction that is produced when the link <i>Send to DocuSign</i> is clicked (from the Client Master).
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. To add link security, click the **Security** icon in the Action Center to access the Security Roles window where you can add one or more roles and secure the custom link to unlimited roles. For details on how to configure link security, see Configuring Link Security.

- 6. Click Save.
- 7. 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
- \\$1\ represents the Signature for the first signer
- \N1\ represents the Name for the first signer

Client Service Agreem This is an example of a Word do		
	COMPANY NAME	
Date: \D1\	By: \S1\ Name: \N1\ Title: \T1\	
Date: \D2\	By: \S2\ Name: \N2\ Title: \T2\	

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.

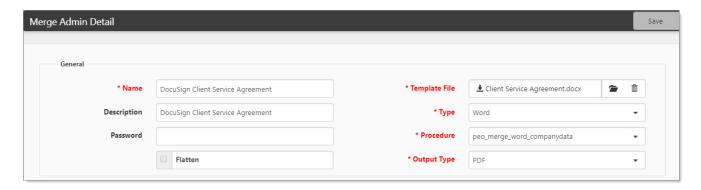
Now you are ready to proceed to the next topic, Uploading the merge template.

# Uploading the merge template

Now you are ready to upload the merge template and then test it.

## To upload the merge template:

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 <i>DocuSign Client Service Agreement</i> .
Template File	This is where you upload the template file.
	<ol> <li>Click (Upload File).</li> <li>The Upload File dialog box opens.</li> </ol>
	2. Click <b>Choose File</b> .
	<ol> <li>Locate the file on your computer and click <b>Open</b>.</li> <li>The file name displays next to Choose File.</li> </ol>
	4. For <b>Description</b> , type a description of the uploaded file. Optional.
	5. For <b>Category</b> , select an entry from the list. Optional.
	6. Click <b>Save</b> .
Description	Type a descriptive title of the merge record.
Туре	Select the file type of the file you just uploaded: <b>Word</b> , <b>Excel</b> , <b>PDF</b> .
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.
	<ul> <li>For standard CSA documents, select a procedure with CSA in the name.</li> </ul>
	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 <b>Type</b> is <b>Word</b> . For Type Word, you can generate a Word doc or a PDF.

## 4. Click Save.

# Configuring the DocuSign 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.

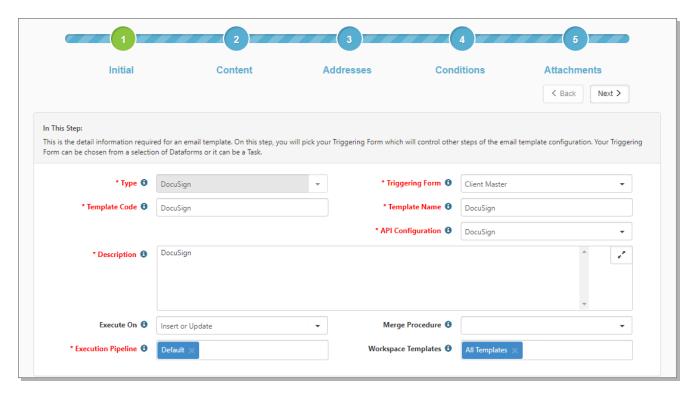


Step 1: Initial

## To configure a DocuSign email template:

- 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.

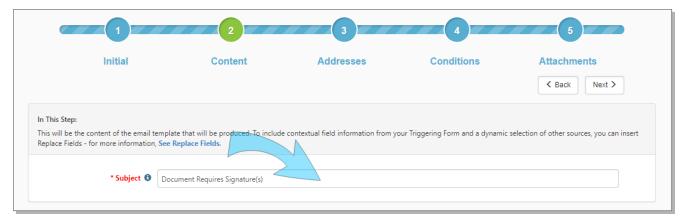
Туре	Select <b>DocuSign</b> . This action enables the API Configuration field.
Triggering Form	This is where your trigger originates. Select the form on which you added the Workflow link, such as <b>Client Master</b> . (The Workflow link was added in a previous step, Configuring the Workflow Link, in the Location field.)
Template Code	Type <b>DocuSign</b> .
Template Name	Type <b>DocuSign</b> .
API Configuration	Select <b>DocuSign</b> .

- 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:

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.

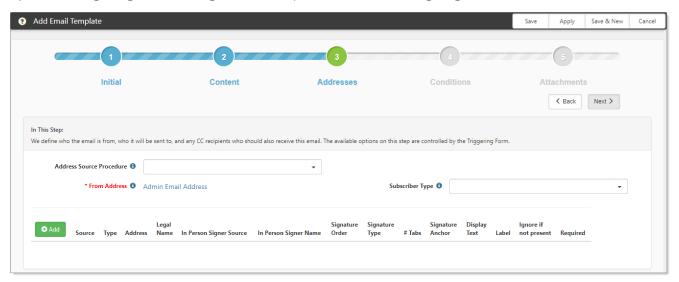
If you are configuring a DocuSign failure notification, consider using the **{ProjectID}**, **{WorkspaceName}** and **{LinkToWorkspace}** replacement fields. Adding these can fields help you troubleshoot where an error occurred.

- 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	<ul> <li>Select the From Address for the email. You can select from a distinct set of options:</li> <li>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.</li> </ul>

- 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 or 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.
Туре	<ul> <li>This field indicates the type of signature:</li> <li>Signer</li> <li>In Person Signer</li> <li>If you select In Person Signer, see Configuring the DocuSign email template for In Person Signing.</li> </ul>
Address	<ul> <li>This is the email address of the person who must sign.</li> <li>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.</li> <li>When Source is <b>Address Source Procedure</b>, select the appropriate option.</li> <li>When Source is <b>Adhoc Email Address</b>, enter the email address to which you would like to send, such as bsmith@test.com.</li> </ul>
	<b>Note:</b> If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the <b>Enable Email for this account</b> field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.
	Note that only a Global Administrator can change this setting.
	Also see Personalizing Your User Profile.

## This is the legal name of the person who must sign. The legal name is used Legal Name when selecting a signature in DocuSign. • When the **Source** field is **Adhoc Email Address**, enter the Legal Name of the signer that matches the Adhoc Email Address, such as Robert Smith. When the Source field is Current User, this field is set to TBD to indicate that the current user is unknown until runtime. When the DocuSign Request Signatures process runs, the Current User profile is used and the Legal Name is determined by the first and last name of the current. • When the **Source** field is set to 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 See Configuring the DocuSign email template for In Person Signing. Source In Person Signer See Configuring the DocuSign email template for In Person Signing. Name Signature Order This field determines the order in which the signature fields are presented in DocuSign. For documents that don't have a required signature order, a recommended best practice is to use the order the signature tags are presented in the merge document, from top to bottom, and 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, Custom... this action places the appropriate DocuSign Approve action on the document. Additionally, Yes or No Date Signed ClientSpace does not literally add check boxes Date Here to the form. We put the action tag in the Decline Email document and let DocuSign do the heavy lifting Initial Here when the document is compiled. Signature Enter Numbers Radio Buttons actions range from Approve, to Initial Here, to Sign Here Sign Here, and many other tags. For assistance Social Security Number Text with custom tags, such as custom formatted Zip fields and radio buttons, log an Extranet case. To Signer Attachment

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.

The **Ignore If Not Present** setting will not remove a Recipient from the envelope that does not have any tags. It will only allow the document to be sent if that tag is not found on the file. If configuring the Email Template when a conditional recipient is necessary based on the document, we recommend creating a separate Email Template for that document type where that recipient will always have at least one tag. For example, if the CEO needs to sign on one specific Contract version and not another, a separate Email Template should be configured for that specific contract version where an action is required for that signer. If not, and the CEO signature tag is not found on the Contract that gets sent to DocuSign, the CEO will still get the document via DocuSign however they will not have any action to take to finalize the document and complete it via the DocuSign process. This will require that the CEO manually add an action to the document in DocuSign in order to finalize it.

# This is the custom tag that you embed in your DocuSign document that is Signature Anchor 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 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 present 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 Required Yes

Nο

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 based on the signature order. 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.



## 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	<ul> <li>Select the From address for the email. You can select from a distinct set of options:</li> <li>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.</li> <li>AdHoc: Allows you to add the From list by typing it in manually.  Note: If you select the AdHoc email address option and enter a ClientSpace user's email address as a recipient, if the Enable Email for this account field on their user profile is unchecked, they cannot receive emails from ClientSpace and will therefore not receive the email generated from this template.  Note that only a Global Administrator can change this setting.  Also see Personalizing Your User Profile.</li> <li>User: Select a specific user of the system by selecting them from a list.</li> <li>Procedure: Select an address stored procedure and pick the From address.</li> <li>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.</li> </ul>

2. To add a new recipient record to this notification, click **Add**.

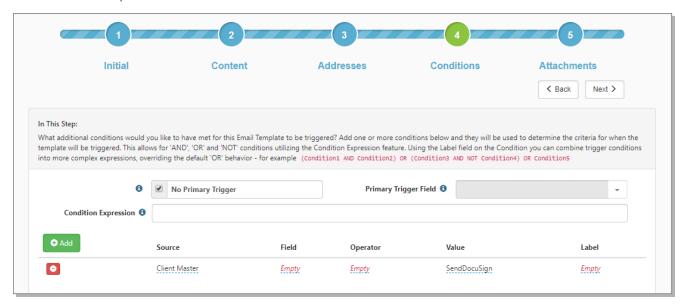
A new row opens for adding recipients. Each recipient's source, type, and address must be unique.

Source	<ul> <li>This is the source of the Signing Host.</li> <li>For dataform sources, this is where the signing host's email address and legal name are retrieved.</li> <li>For Source as Adhoc Email Address, enter the email address of the signing host in Address.</li> </ul>	
Туре	For in person signers, select <b>In Person Signer</b> .	
Address	<ul> <li>This is the email address of the signing host. This must be a valid DocuSign user account or DocuSign will reject the document.</li> <li>When Source is a dataform, this is the signing host's email address.</li> <li>When Source is <b>Adhoc Email Address</b>, enter the email address of the signing host.</li> </ul>	
Legal Name	<ul> <li>This is the legal name of the signing host. This must be a valid DocuSign username or DocuSign will reject the document.</li> <li>When Source is <b>Adhoc Email Address</b>, enter the Legal Name of the signing host.</li> <li>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.</li> </ul>	
In Person Signer Source	<ul> <li>This is the Source of the person who must sign in the presence of the signing host.</li> <li>When Source is a dataform, this is the form from which to retrieve the In Person Signer's Legal Name.</li> <li>When Source is Adhoc Email Address, enter the Legal Name of the Person who must sign in the In Person Signer Name field.</li> </ul>	
In Person Signer Name	<ul> <li>This is the name of the person who must sign in the presence of the signing host.</li> <li>When In Person Signer Source is a dataform, this is the field from which to retrieve the In Person Signer's Legal Name.</li> <li>When In Person Signer Source is Adhoc Email Address, enter the In Person Signer's Legal Name.</li> </ul>	

- 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 <b>Primary Trigger Field</b> is disabled.
Only Trigger Once	When selected, the email template is triggered only once when the conditions are first met. Do not select this option if you want the email template to trigger each time the conditions are met.
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 <b>Add</b> area.
	<ul> <li>Condition entries are identified with a Label (the last column).</li> <li>If a Primary Trigger Field is selected, that field MUST change values to trigger this template and evaluate the conditions.</li> </ul>

- 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.

# 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	The <b>Source</b> list includes the triggering form and (i.e., the original form that started the channel), forms, and the tabs of those single-forms. Appl configured, may also be included.  When you select <b>Task</b> as the Triggering Form in	all triggerable, active single- licable server data procs, if
	Source sets to Task.	, ,
Field	<ul> <li>Select the dataform or Stored Procedure field to compare to the trigger value.</li> <li>A few notes: <ul> <li>Email Template triggering provides multi-lookup fields (Multi Lookup (MultiLookup)) as triggering conditions.</li> <li>Field supports parent form fields. <ul> <li>Available operators are Empty, Not Empty, and Is Dirty.</li> </ul> </li> <li>Note: If you are creating a Scheduled Email Template, the Is Dirty operator is</li> </ul></li></ul>	Comments  Assigned To Body Category Comments Due Date Source fkCompletedByUserID IsMarkedForDeletion Owner Priority Send Notification Stage Start Date Source Status Subject

not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

• Field supports the **Active** dataform setting. Available operators are Does Not Equal, Equals, and Is Dirty (if choosing the triggering form as the **Source**). **Value** options are Unchecked and Checked.

**Note:** If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

- 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.
- 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.

#### Note:

- Is Dirty is not available in the Operator list when the Source is set to something other than the Triggering Form.
- If you are creating a Scheduled Email Template, the Is Dirty operator is not in the list as real time analysis of a field is required to determine an "Is Dirty" state.

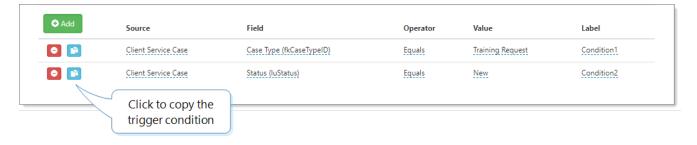
#### Value

The criteria against which the trigger field is compared. For a condition that is

	typeahead <sup>1</sup> 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. ClientSpace assigns a label to a new condition with the naming convention C#. For example, C1 for the first condition that you create, C2 for the second, and so on. You can change the label name by selecting the name of the label and typing a new name for the label. For example, you can select the C1 label and enter Condition1 as the new label name.  Tip: Make this label short and representative of the Trigger Field. Labels are used in the Condition Expression field.
	used in the Condition Expression field.
Condition Expression	Allows for <b>AND</b> , <b>OR</b> , and <b>NOT</b> 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.



<sup>&</sup>lt;sup>1</sup>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.

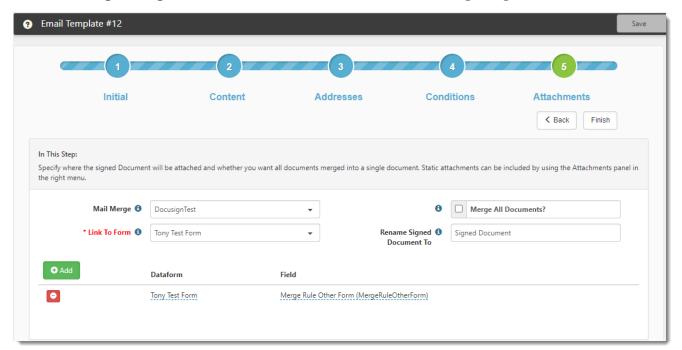
- 3. You can now edit the new condition as appropriate.
- 4. Click **Apply** or **Save**.
- 5. Click **Next** to proceed to Step 5: Attachments.

### 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. See Business Rule Methods: Generating Merge Files.



### To complete the Attachments step:

1. Complete the form.

Mail Merge	The options in this field 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	<b>Link To Form</b> is a required field that informs the system of the form to which the document(s) will be attached after being signed and returned to the system. The <b>Triggering Form</b> field value from the <b>Initial</b> tab auto-fills the <b>Link To Form</b> field by default. You can edit the default value by selecting a single-form or a triggering multiform (if applicable) from the drop down list.
Rename Signed Merge	Renamed files can be <b>Mail Merge</b> files, or merged attachment files if you have selected <b>Merge All Documents</b> . During the process that links the signed document to a form, the document is renamed by prepending the original document name with an identifying tag, such as a signer's name, that you specify here. By default, the original file name of signed and returned files are always prepended with "COMPLETED_". Any value you specify here is added before the original file name using the following format: COMPLETED_ <b>Rename Signed Merge</b> field value}_{Original File Name}.
Merge All Documents?	Check <b>Merge All Documents?</b> if you want all signed and attached documents to be merged into a single document. When you select this option, you can also attach the merged document to a specified <b>Link To Field</b> but this is not required.
Link To Field	Once you check <b>Merge All Documents?</b> , the <b>Link To Field</b> displays. Optionally, select a file upload field from the <b>Link To Field</b> drop down list to which to attach the merged document.  If you leave <b>Merge All Documents?</b> selected but do not choose a <b>Link To Field</b> , the merged document is added to the Attachments Action Center panel on the dataform.

### Add

In the Add rows, specify the fields where ClientSpace retrieves the file for DocuSign. You can specify files from multiple fields.

- Click **Add**.
   A row opens.
- 2. Select the **Dataform** where the file resides.
- 3. Optionally, enter a value to prepend to the original document name when the document is signed and returned. This could be an identifying tag, such as a signer's name. By default, the files are also prepended with COMPLETED\_ when they are signed and returned.
  - If a value is entered in the **Rename** column for a file, the returned file name has the following format: COMPLETED\_ {Rename field value}\_{Original File Name}.
  - If no value is entered in the **Rename** column for a file, the returned file name has the following format: COMPLETED\_ {Original File Name}.

**Note:** The **Rename** column is not available if you check the **Merge All Documents?** checkbox to merge all documents into one file.

4. Select the dataform **Field** where the file resides. Any file name updates to completed single files will be made to this location.

#### 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:

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 <b>Report</b> . 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 <b>CSA</b> .

### 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 **C** (**Reload**).
- 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 **6** (**Go to Workspace**).
- 2. In the **Action Center**, in **Links**, click **Collateral**. The Collateral form opens.
- In CSA, click (upload).
   The Upload File dialog box opens.
- 4. Click Choose File.
- Locate your merge file and click **Open**.
   You are returned to the Upload File dialog box.
- Click Save.
   The merge file name displays in the CSA field.



# Sending to DocuSign

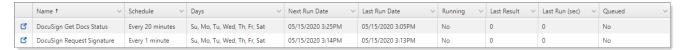
Now you are ready to send your document to DocuSign. However, before you send, let's check to see if the required scheduled processes are active.

# 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.



### To review the scheduled process status:

- 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:

- Go to System Admin > Advanced > Scheduled Processes.
   The Scheduled Processes Admin dashboard 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:

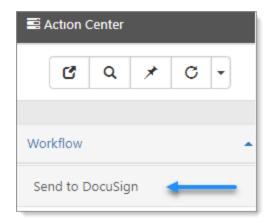
- DocuSign Request Signature to run every 1 minute.
- DocuSign Get Docs Status to run every 5 minutes.

### 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 and Managing Document Statuses in the DocuSign Process.

# Viewing and Managing Document Statuses in the DocuSign Process

## The Uploaded Files Queue Dashboard

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 API record, the Uploaded Files Queue is visible on the Imports tiles. Otherwise, it is hidden.



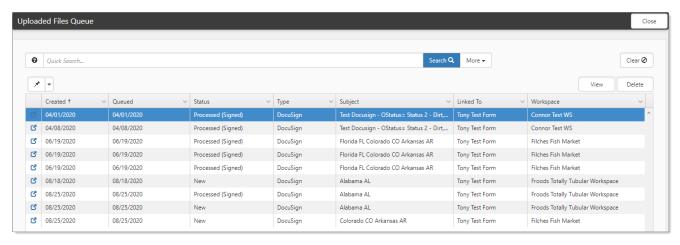
- The Uploaded Files Queue records initiate with a Status of New.
- If the files cannot be sent to DocuSign, the Uploaded Files Queue displays a Status of CS Failure or DS Failure. CS Failure tracks DocuSign upload failures that occur due to a ClientSpace issue. DS Failure tracks upload failures that occur due to a DocuSign issue.
- If the document in CS Failure status fails to upload, you can reset the Status back to New (see To reset the status of failed documents:) which changes the Queue Status to new and resets the Retry Count to 0. You can also use the Mass Update > Reset Retry Count feature to reset the Retry Count of one or more failed documents to 0 (see To reset the Retry Count of failed documents using Mass Update).

**Note:** You can also gather additional information on a failed upload from the Exception Log. SeeViewing DocuSign Exception Errors.

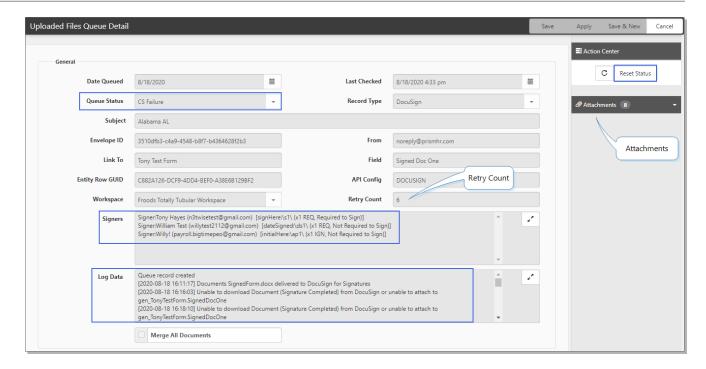
- When a DocuSign required tag is missing from one of the files, additional information is displayed in the Uploaded Files Queue record.
  - When this occurs, you must re-run the merge file, upload the correct file to the field, and trigger the Send to DocuSign again.
  - After the DocuSign Request Signature scheduled process runs, the Uploaded Files Queue
     Status changes to Out for Signature.
- If a document not signed or voided in 120 days, the document **Status** is automatically updated to Archived.
- Additionally, you can create a workflow to notify users when signed documents come back into ClientSpace.

### To access the Uploaded Files Queue dashboard:

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 **(3)** (**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:

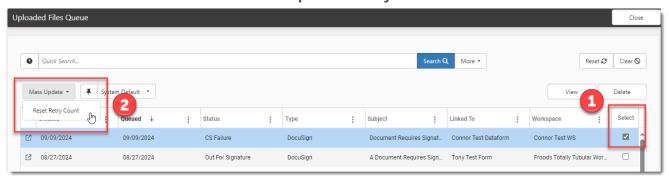
For failed documents, you can reset the **Status** back to New using **Reset Status**, which is only available when **Status** equals CS Failure.

- 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 **Status** resets to New, and the **Retry Count** is set to 0 (zero).

### To reset the Retry Count of failed documents using Mass Update:

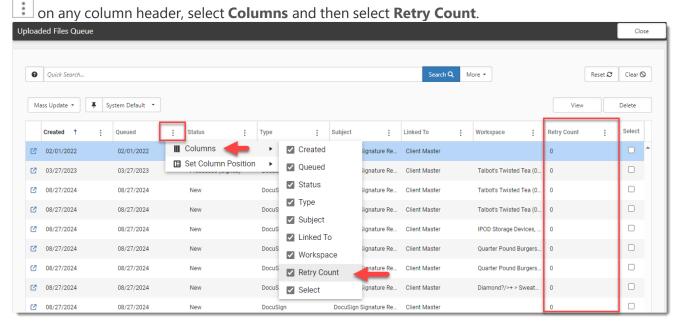
For a single or multiple failed documents, you can also use a Mass Update option to set the **Reset Count** to 0 so that the failed document uploads can be reprocessed.

 On the Uploaded Files Queue dashboard, click Select next to one or more failed entries showing a Status of CS Failure and then select Mass Update > Retry Count.

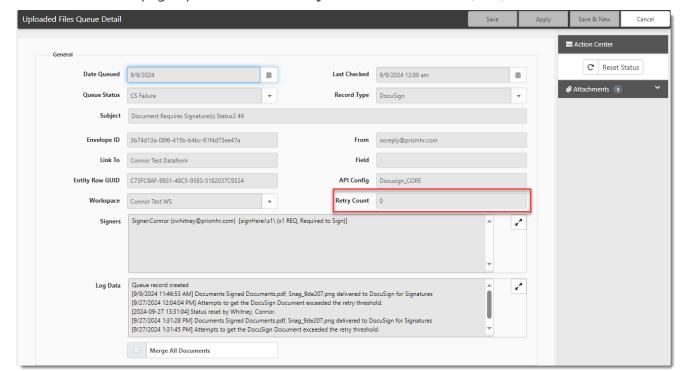


#### Note:

 You can display a Retry Count column on Uploaded Files Queue to view the current Retry Count setting. To display the column, click the vertical three dot menu (i.e., Kebab menu)



If you open a failed entry on the Uploaded Files Queue and click (Jump), the Uploaded



Files Queue Detail page opens where the **Retry Count** is now set to 0 (zero).

# **Related Topics:**

Viewing DocuSign Exception Errors

# 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 Failure and includes the Log Data from the related Uploaded Files Queue record. The email template is Active by default.

The system uses the retry threshold count for the DocuSign API configuration to determine when to trigger the DocuSignFail email template. If a DocuSign call fails, the system evaluates the number of retry attempts for the DocuSign call and the max number of retries set in the **retrythreshold** field for the DocuSign API configuration. If the number of retries for the DocuSign call is less than the threshold, the system will try again before triggering the DocuSignFail email template. If the number of retries

equals the threshold, the system will trigger the DocuSignFail email template. See Configuring the DocuSign API Record for more information about the retry threshold.

#### 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 <b>DocuSign</b> .
Triggering Form	Select the form to which the completed files are uploaded. In our example, we used the Collateral dataform.
Field	Select <b>HdrAction</b> .
Value	<ol> <li>In Value:</li> <li>Select Other Value.         The Header Action Value dialog box opens.     </li> <li>In Value, type one of the following:         <ul> <li>DOCUSIGN_COMPLETED</li> <li>DOCUSIGN_DECLINED</li> <li>DOCUSIGN_VOIDED</li> </ul> </li> <li>Click Ok.</li> </ol>

2. For more details on creating a Workflow, see Configuring your Workflow Channel.

# 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 DocuSign API Record.

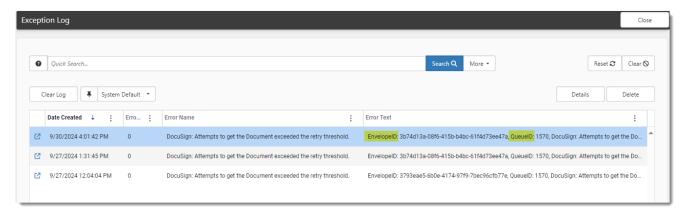
# Viewing DocuSign Exception Errors

# The Exception Log

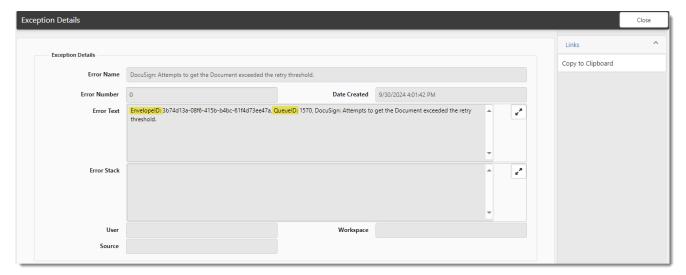
The Exception Log dashboard, when used in conjunction with the Uploaded Files Queue dashboard, can provide additional insight when you are troubleshooting DocuSign upload failures, particularly "retry threshold" failures.

### To access the Exception Log dashboard:

Go to System Admin > Exception Log.
 The Exception Log dashboard opens. The Error Name and Error Text columns display helpful information. In the case of a "retry threshold" error, the Envelope ID and Queue ID of the failed record are shown.



2. Alternatively, you can **(Jump)** to the record details from the row entry. The Exception Details page opens. The page is read-only.



# **Related Topics:**

Viewing and Managing Document Statuses in the DocuSign Process

# **CCMSI**

CCMSI is a third-party administrator for workers' compensation programs. 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

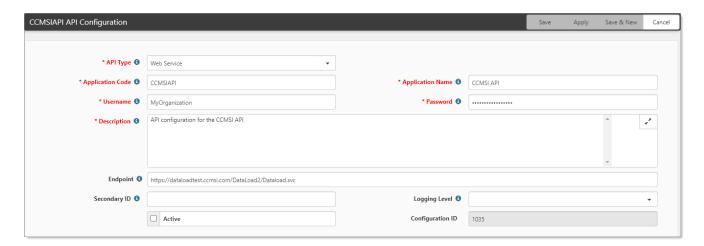
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Member Number and Location Number	
CCMSI lookups	956
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# Configuring the CCMSI connection

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:

- Go to System Admin > Advanced > API Configuration.
   The API Configuration dashboard opens.
- Highlight the row for CCMSIAPI and double-click or click (Open).
   The CCMSIAPI API Configuration form opens.



# 3. Complete the following fields:

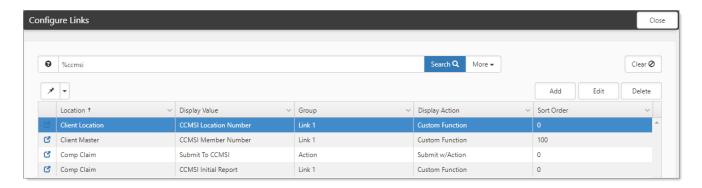
Username	The organization CCMSI username.
Password	The organization CCMSI password.
Endpoint	The URL that points to the API services for your organization. This is specific to each client.
Secondary ID	The organization CCMSI member number. This is the client identifier, which is part of the authenticator object – the Username and Password, specific to each client, is related to the Secondary ID.

### 4. Click Save.

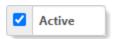
### To activate the links:

- 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:

- 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**.

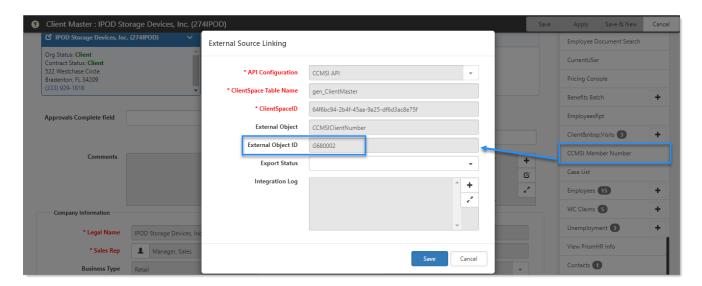
# Member Number and Location Number

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:

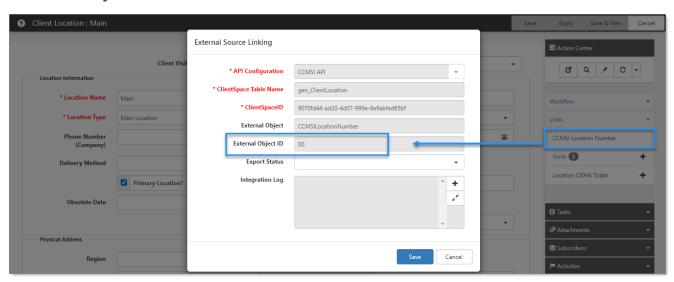
- 1. Open the Client Master.
- 2. In the **Action Center**, expand **Links** and click **CCMSI Member Number**. The External Source Linking dialog box opens.
- 3. In **External Object ID**, enter the CCMSI Member Number.



4. Click Save.

### To enter the CCMSI Location Number:

- 1. Open the Client Location dataform.
- 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.



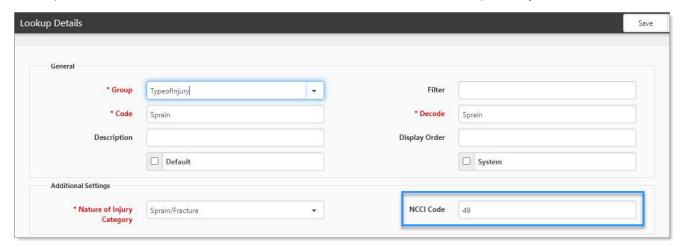
4. Click Save.

# **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.





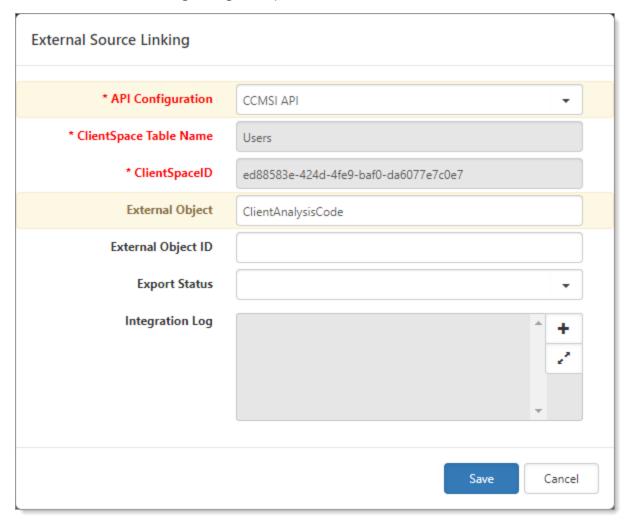
# CCMSI client analyst users

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.

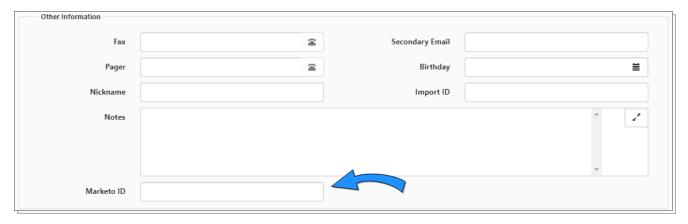
|--|

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

# **Gradient Al**

Gradient AI is a provider of artificial intelligence analysis solutions for the insurance industry. Their solutions are designed to improve loss ratios and profitability by predicting underwriting and claims risks, and suggest appropriate premium pricing. Gradient AI solutions use your data and regional data to make sure suggested prices are accurate based on risk and location.

ClientSpace currently offers two Gradient AI API integrations:

- **Gradient AI Health Benefits** uses artificial intelligence to analyze your offered benefits plans and compare them to potentially thousands of other offered benefits plans submitted by other PEOs in your area. If you are a small to mid-size PEO and you do not have an on-site benefits expert, a Gradient AI Health Benefits analysis can provide insight into how your pricing stacks up against others to help you to determine if you are pricing benefits properly. See Gradient AI Health Benefits.
- **Gradient Al Risk** uses artificial intelligence to analyze Pricing Console batch information such as payroll, headcount, workers compensation position codes, and worker's compensation loss history (if available). Data from the submitted Pricing Console batch is processed by Gradient Al in real time and results are aggregated by each worker's compensation policy included in the batch. The results include information such as predicted losses and a suggested premium (i.e., **Target Premium**). See Gradient Al Risk.

**Note:** A relationship and contract with Gradient AI is necessary to utilize either of these API connections.

# **Gradient Al Health Benefits**

The Gradient AI Health Benefits API in ClientSpace allows you to receive assessments of your offered benefits plans by using Gradient AI's artificial intelligence models to compare your submissions to its large database of offered benefits submissions from other PEOs in your area.

## Why do I care about this?

The Gradient AI Health Benefits API can help you determine whether you are overpricing or underpricing benefits based on your underwriting groups and region.

### What does it do and how do I use it?

To receive an assessment of your offered benefits plan, you must submit your offered benefits and Health Census information to Gradient Al. There are two ways to do this:

- Initiate the Submit Action Manually Complete a Gradient Health Census report using a template
  we provide. Attach the completed health census report to the Benefits Batch dataform in the
  Completed Health Census file upload field. Then, click the Submit to Gradient AI link to submit
  your offered benefits and Health Census information to Gradient AI.
- Automate the Submit Action If your organization can configure Salesforce to export completed
  Health Census reports to ClientSpace and attach them to the correct Benefits dataforms in the
  Completed Health Census file upload field, you can use the \_GAlCensusValidation ClientSpace
  business rule method on the Salesforce API pipeline to submit offered benefits and Health
  Census information to Gradient AI. Submissions occur when the Completed Health Census file
  upload field is populated (i.e., "Not Empty" and "Is Dirty".)

Even if you choose to automate submissions, the **Submit to Gradient AI** link remains available for use.

#### To use the manual submission method:

- 1. Go to a workspace and open a Benefits Batch dataform to record the benefits you want to offer to your client's employees.
- 2. Then, click the **Gradient Health Census** link and fill out the form.



The Gradient Health Census report is an Excel spreadsheet template used to add pertinent employee information such as employee names, employee IDs, dates of birth, residence zip codes, coverage types and underwriting groups.

3. Enter all employees that you want to include in your submission to Gradient Al. When completed, the Gradient Health Census appears similar to the following:



4. Next, attach the Gradient Health Census report to the Benefits Batch Dataform by clicking **Attach** File in the **Completed Health Census** file upload field.



5. When you are ready to submit offered benefits and Health Census information to Gradient Al, click the **Submit to Gradient Al** link.



ClientSpace validation runs to ensure coverage types are not blank and that there are valid subscribers and underwriting groups. If an error is found, it will display at the top of the Benefits Batch form. You must correct these errors and resubmit again.

Once you successfully submit the Health Census data to Gradient AI, Gradient AI checks the data more extensively. For instance, specific coverage types are validated. You will receive an "Accepted" "Succeeded" or "Failed" email notification based on Gradient's analysis.

6. Click the **Gradient AI Health Results** link on the Benefits Batch dataform to view the Gradient AI Health Results dashboard. If the submission was successful, the dashboard lists a record for each underwriting group included in the submission.

The same notification details that you receive via email are also logged on the Gradient Al Health Results window in the Validation section.

7. Click (Open) next to a line item to view the results for an underwriting group. If a record in the submission has a **Status** of "Failed", review the **Log** field for validation errors and other error details.

**Note:** A summary of key findings also displays in the widgets located at the top of the Benefits Batch window.



### To configure the automated submission method:

Work with your Salesforce system administrator to set up Salesforce to insert health census data into the **Completed Health Census** file upload fields of the correct Benefits Batch dataforms in ClientSpace.

When this is done, complete one-time business rule configuration in ClientSpace. Once the ClientSpace business rule configuration is complete, offered benefits and Health Census information will be submitted to Gradient AI when the **Completed Health Census** file upload field on the Benefits Batch dataform is populated (i.e., "Not Empty" and "Is Dirty").

- 2. Locate the Benefits Batch "Health Census Validation (Salesforce API)" rule and click (Open)next to it.
- 3. Verify the following settings, editing if necessary.

Method	_GAICensusValidation
Primary Trigger Field	Completed Health Census
Primary Trigger Operator	Not Empty
Secondary Trigger Field	Completed Health Census
Secondary Trigger Operator	Is Dirty
Pipeline	Salesforce API
Save Action	Insert
System	Checked

### 4. Click Save.

### To track automated submissions and view results:

With the manual method, the logged in user who clicks the **Submit to Gradient AI** link is the **Submitted By** user and only the **Submitted By** user receives "Accepted", "Succeeded" and "Failed" notifications. These email notifications are not sent for the automated method since a business rule is initiating submissions instead of a logged in user. However, all notifications are still recorded on the Gradient AI Health Results window in the Validation section:



- 1. Access the Gradient AI Health Results window by clicking the **Gradient AI Health Results** link on the Benefits Batch dataform to view the Gradient AI Health Results dashboard. If a submission was successful, the dashboard lists a record for each underwriting group included in the submission.
- 2. Click (Open) next to a line item to review the Gradient AI notification details in the Status and Log fields. If a record in the submission has a Status of "Failed", review the Log field for validation errors and other error details.

#### Miscellaneous notes

- The Gradient Health Benefits API returns an assessment for each unique underwriting group listed in the Offered Benefits Plan (as reflected in the Gradient Health Census report).
- If the Gradient Health Benefits API is not able to return an assessment due to an issue with the submission, such as Gradient AI underwriting group not matching an underwriting group you entered in the Gradient Health Census report, a "Failed" status is logged in the Validation section (Log field) of the Gradient AI Health Results window. If the submission was manual, the Submitted By user will also receive an email notification.
- For manual submissions, Gradient AI Health Benefits notifications are only sent to the user who clicked the **Submit to Gradient AI** link (i.e., the **Submitted By** user). The **Submitted By** user name displays on the Benefits Batch dataform in the "Gradient AI Benefits" section.

# Implementation procedure overview

A relationship and contract with Gradient AI is necessary to utilize the Gradient AI Health Benefits API in ClientSpace. To integrate the Gradient AI Health Benefits API 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 Gradient AI Health API integration.

Task	Who performs this task?
Set up the API configuration	Professional Services
Enable the business rules	Professional Services
Review the Gradient AI Health Benefits dataform security	Client
Configure the Benefits Batch dataform links to Gradient AI	Available in the application. May be enabled by Professional Services.
Identify and set up the workflow processes	Client
Demonstration	Professional Services

# **Gradient Al Risk**

The Gradient AI Risk API in ClientSpace allows you to receive real-time assessments of your Pricing Console batch information worker's compensation predicted losses and a suggested premium (i.e., Target Premium) for each worker's compensation policy included in the batch.

### Why do I care about this?

Real-time data determines the best worker's compensation policy pricing based on a variety of risk factors and your geographic region.

#### What does it do and how do I use it?

Gradient Al uses information from the States and Codes section of the Pricing Console such as **State**, **Code**, **GrossPayroll**, and **EEs**:



Gradient AI also uses historical worker's compensation loss information, if entered. Though this information is optional, providing it can greatly increase the accuracy of your results. Enter this information by clicking the **Loss History** link on the Pricing Batch dataform:



When you are ready to submit the pricing console information to Gradient AI, click the **Submit To Gradient AI** link.



Results are returned in real time. Click the **Gradient Al Risk Underwriting** link on the Pricing Batch dataform to view the results.



Gradient AI aggregates the results by worker's compensation policy. Therefore, you will see one line item listed per policy:



The **Rating State** column displays the state associated with the policy. If a policy includes multiple states under the same worker's compensation policy, the state with the most payroll displays as the **Rating State**:



Return to the Pricing Console main dataform to view results summary dashboard information at the top of the form. The dashboard on the left shows a summary of key information across <u>all</u> submitted worker's compensation policies. The dashboard on the right displays a summary of key information for each submitted policy:



## Implementation procedure overview

A relationship and contract with Gradient AI is necessary to utilize the Gradient AI Risk API in ClientSpace. To integrate the Gradient AI Risk API 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 Gradient AI Risk API integration.

Task	Who performs this task?
Set up the API configuration	Professional Services
Enable the business rules	Professional Services
Review the Gradient Al Risk dataform security	Client
Configure the Pricing Console > Pricing Batch dataform links to Gradient Al	Available in the application. May be enabled by Professional Services.
Identify and set up the workflow processes	Client
Demonstration	Professional Services

# Benefit Plan API

The Benefit Plan API is a one-way export API that allows you to export benefit plan setup information from ClientSpace to PrismHR. Once this information is in PrismHR, you can enroll employees and manage the plans in PrismHR.

• Attachments and Templates: Benefit Plan API Export Field Mapping and Benefit Rules (Excel File)

# Benefit Plan API Configuration

To configure the Benefit Plan API, you will need to perform the following steps:

- Step 1: Configure Benefit Plan API Business Rules
- Step 2: Configuring the Benefit Plan API Custom Link

# Benefit Plan API Export Prerequisites

The Benefits API export is run from a client workspace. Before that can occur, you must have set up your master plans and set up offered benefits for your clients.

### Master Plan Setup

• Set up or verify the master plans in the Admin Workspace.

Note: The Admin workspace can be accessed by searching for "Admin" in the Workspace Search dashboard. Once you are in the Admin Workspace, enter "Benefits Plan" in the search for dataform field and then click the Benefits Plan tile to view existing master plans or add a new plan. To view an existing plan, double-click the row or click (Open) next to the plan.



• Set or verify the available Rate Groups for each master plan.



- Set or verify Benefits Tiers.
  - **Note:** To access the Benefits Tier Definition window, on the Admin Workspace, enter "Benefits Tier" in the *search for dataform* field and then click the Benefits Tier Definition tile.
- Admin level plans must also be created along with their associated premium and billing rates.
   These items must align so that they can be identified when exported into PrismHR from
   Clientspace (i.e., Benefit Plan Identifier(UniquePlanCode) = Benefit Plan ID and Rate Group title = Rate Group).

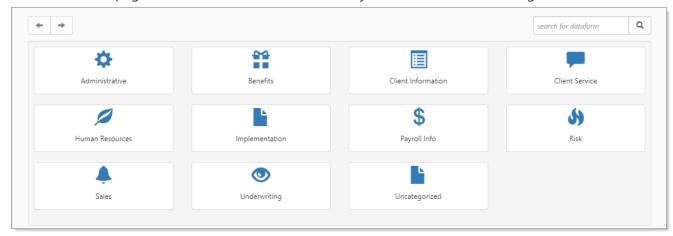
### Adding or Updating Offered Benefits

Once master benefit plans are set up and the underwriting and pricing are added, add the plans you will be offering to your clients for the current enrollment period to the Benefits Batch. The Benefits

Batch is used to track all the plans you make available to a client in an enrollment year. This is set up at the client (i.e., workspace) level.

To add or update offered benefits on a client's workspace:

- From the modules bar, click QWorkspaces.
   The Workspace Search dashboard opens.
- Select a workspace and click (Open).
   The Workspace page opens.
- 3. Move down the page to the administrative tiles where you see the dataform categories.



- 4. Enter "Benefits Batch" in the *search for dataform* field and then click the **Benefits Batch** tile. The Benefits Batch window displays.
- 5. Click (Open) next to an existing Benefits Batch OR click Add to add a new Benefits Batch. The Enrollment window displays.
- 6. In the Action Center, under Links, click the + next to the **Offered Benefit Plans** link to add an offered benefit OR click on the link text to select an existing offered benefit plan to edit. The Offered Benefits Plan window displays.
- 7. Complete the form as applicable. Minimally, the following fields should be filled in for a successful export:

Benefit Plan, Rate Group, Effective Date, and Benefit Group.

The combination of the **Benefit Plan**, **Rate Group** and **Benefit Group** comprise a unique benefit plan. These fields <u>must</u> match corresponding fields in PrismHR for a Benefit Plan export to occur. For a complete list of all of the Benefit Plan fields and Benefit Plan Rules that export to PrismHR, click the "ClientSpace to Prism Benefit Plan Export Field Mapping and Benefit Rules (Excel file)" link located on the Attachments and Templates article.

Category This is not a data entry field. This is a filter setting used to filter the Benefit Plan lookup to only display a list of benefit plans that match your selection. Benefit Plan This is the master plan that the offered benefit is based on. Rate Group Select the appropriate **Rate Group** from the associated master plan. Effective Benefit plan data will not export to PrismHR if a plan **Effective Date** is not entered. Date Benefit A Benefit Group allows you to add an additional layer of specialization to a plan. **Example:** You could create a Benefit Group record named "25PLUS" to classify Group employees who have been with your client's organization for more than 25 years and modify the employer contributions in PrismHR to provide a seniority-based discount to employees in this group. You also define the enrollment waiting period on the Benefit Group record. ? Benefit Groups : Main Save Apply Save & New ≅ Action Ce **Group Name** À Group Code ₫ Q 🖈 C Waiting Period 2 Group Description 1st of the month following 3 months 1st of the month following 30 days 1st of the month following 60 days Administrative Fields 1st of the month following 90 days 464550ad-d1cc-4a17-acbb-3f9bc04dad1f ID 1091 **Date Created** 11/17/2020 11:30 am ≡ Created By Maker, Rain 11/17/2020 11:30 am ≡ Maker, Rain Date Updated Updated By John's Benefits Demo ✓ Active Employer Edit the Employer Contributions to indicate how much to contribute to the Contributio employee. Modify the monthly premium from the master plan Rate Group for each coverage type only if necessary as this information is cloned from the master plan ns

**Note:** As you make changes to this section, the Employer Contributions section is updated to reflect employer costs while the grid located at the top if the Offered Benefits Plan window is updated to reflect both the Employer and Employee

and should rarely require overriding.

contribution for each coverage type.

To edit Employer Contributions, select an option from the **Contribution Method** field:

- Contribute EO Premium This is the default selection. 100% of the employee premium is paid by the Employer up to the Max Dollar Amount. The Max Dollar Amount is set by default as the EO monthly premium for the associated Rate Group.
- Manually Set Percentages Manually adjust the default percentages of employer contribution and/or adjust the specified Max Dollar Amount for all coverage types.
- Match EO Contribution Manually adjust the default percentages of employer contribution and/or adjust the specified **Max Dollar Amount** for the EO coverage type only. The other coverage types will be recalculated based on these values
- Match EO Contribution Add an employer contribution for an eligible dependent in the **Dependent Contrib**% field. The system recalculates all of the other coverage types where dependents are being covered. For instance, if you leave the EO% set to 100% and enter 50% in the **Dependent Contrib**% field, this indicates that in addition to paying 100% of the employee premium, the company will cover 50% of dependent premiums. The employer contribution percentages and the **Max Dollar Amount** fields of the other coverage types is recalculated to include the total employer contribution with the dependent contribution factored in.

# Setup Details

Setup Details export to PrismHR. They provide billing and payroll deduction information about the benefit plan to PrismHR.

- One Month Prepay -Determines whether to bill the client and deduct the amounts from the employees for the next month in the current month. For example, bill and deduct in July for August. This is not applicable for weekly plans.
- Add One Month for Prepay -Whether the system should check for and use any new rates and rules in the upcoming month. For example, during a July payroll, PrismHR checks if there are rules and rates that go into effect in August. This is not applicable for weekly plans.
- Annual Periods -Calculates the employee deduction amount into either 48 or 52 deduction periods.
- Coverage Ends On Indicates the date coverage ends when an employee is terminated. For example, select "Ends at End of Month" to have the coverage

- end on the final day of the month when an employee was terminated.
- Benefits Billing Frequency Determines when plan billing occurs. If you select
  one of the monthly options, PrismHR bills the client the whole portion at the
  beginning of the month, and then gives credits for the other pay periods in that
  month. If you do not make a selection, the system uses the pay period. Weekly
  plans always use "Pay Period".
- Payroll Deduction Frequency Determines whether to override the employee's normal payroll deduction frequency. The standard is to deduct each pay period. However, you can change this to "Monthly" for instance.
- 8. Click Apply or Save.
- 9. Repeat the steps in this topic until all of the offered benefits for this client are set up. Once you have finished setting up offered benefits and the client has reviewed them and picked the ones they want to offer to their employees, you can select and reject offered benefits in ClientSpace. This step is required before you can export benefit plans to PrismHR as only "Selected" plans can be exported. See Selecting or Rejecting Benefit Plans to Export.

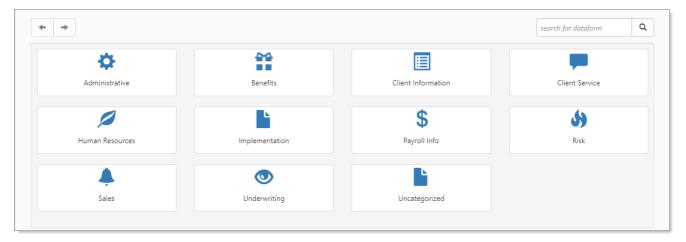
# Selecting or Rejecting Benefit Plans to Export

Once you have offered benefit plans set up in ClientSpace, you can select the plans that the client wants to offer to their employees and reject the ones that they do not want to offer by selecting **Select** or **Reject** in the Offered Benefits Plan workflow. Only "Selected" plans will be exported to PrismHR.

For more information on setting up offered benefit plans, refer to Benefit Plan API Export Prerequisites.

### To select or reject offered benefits on a client's workspace:

- From the modules bar, click QWorkspaces.
   The Workspace Search dashboard opens.
- Select the desired workspace and click (Open).
   The Workspace page opens.
- 3. Move down the page to the administrative tiles where you see the dataform categories.

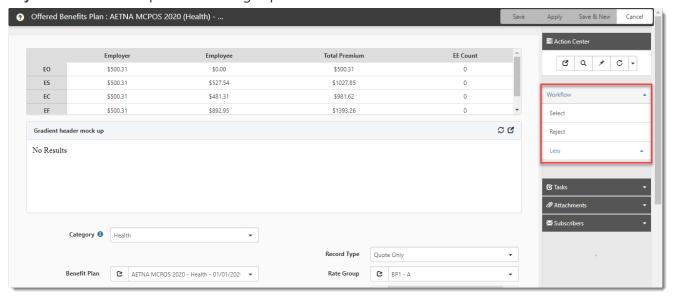


4. Enter "Offered Benefits" in the *search for dataform* field and then click the **Offered Benefits Plan** tile

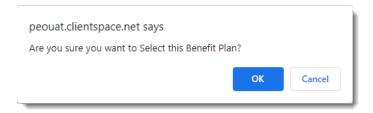
The Offered Benefits Plan window displays.

Alternatively, you can access offered benefits by searching for Benefits Batch", click the **Benefits Batch** tile and then selecting the **Offered Benefit Plans** link in the Action Center.

- 5. Click (Open) next to the Offered Benefits Plan you want to select or reject. The Offered Benefits Plan details for the selected plan are displayed.
- 6. In the Action Center, under Workflow, click **Select** to select this plan for export to PrismHR or click **Reject** to exclude the plan from being exported.



A confirmation message displays.



#### 7. Click OK.

Once you have finished selecting all of the plans for your client, you can export the plan information to PrismHR. See Exporting Benefit Plans to PrismHR.

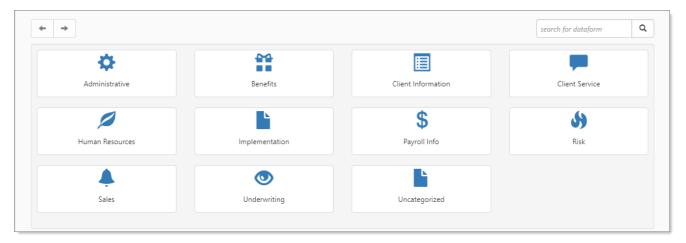
# **Exporting Benefit Plans to PrismHR**

Once you have selected the offered benefits that your client wants to offer to their employees, you can export the selected plan data to PrismHR using the Benefits API.

The combination of the **Benefit Plan**, **Rate Group** and **Benefit Group** comprise a unique benefit plan. These fields <u>must</u> match corresponding fields in PrismHR for a Benefit Plan export to occur. For a complete list of all of the Benefit Plan fields and Benefit Plan Rules that export to PrismHR, click the "ClientSpace to Prism Benefit Plan Export Field Mapping and Benefit Rules (Excel file)" link located on the Attachments and Templates article.

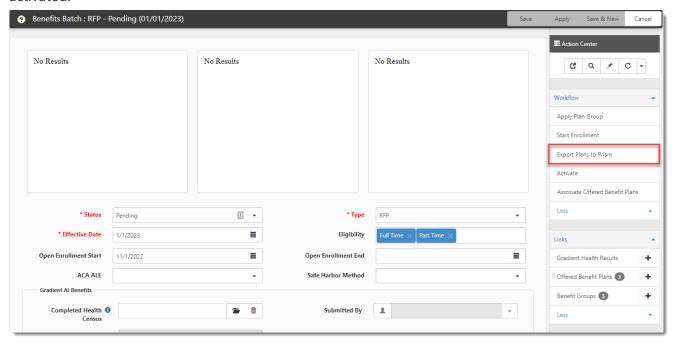
### To export benefit plans to PrismHR:

- From the modules bar, click QWorkspaces.
   The Workspace Search dashboard opens.
- Select a workspace and click (Open).
   The Workspace page opens.
- 3. Move down the page to the administrative tiles where you see the dataform categories.



- 4. Enter "Benefits Batch" in the *search for dataform* field and then click the Benefits Batch tile. The Benefits Batch window displays.
- 5. Click (Open) next to the Benefits Batch containing the plan information you want to export. (The batch **Status** shown in the grid should be listed as "Pending".)
- 6. On the Benefits Batch window, in the Action Center under Workflow, select **Export Plans to Prism**.

**Note:** You can export plans that have not been activated yet. However, since the Benefits API export is a one-way export, remember to update the plan statuses in ClientSpace once they are activated.



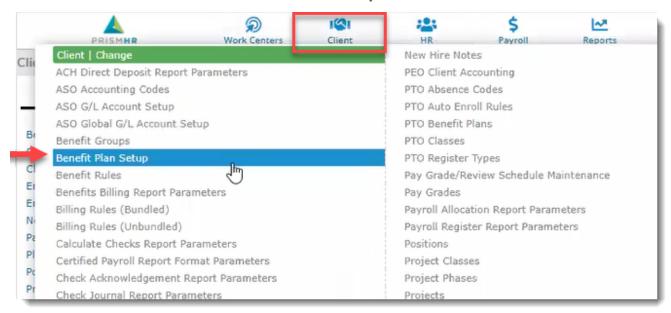
If no errors occur during export, a confirmation message displays indicating that the export was successful. You can then verify the exported data in PrismHR. See Viewing Exported Benefit Plans in PrismHR.

#### Viewing Exported Benefit Plans in PrismHR

Once benefit plans have been exported to PrismHR, you can view the plan information.

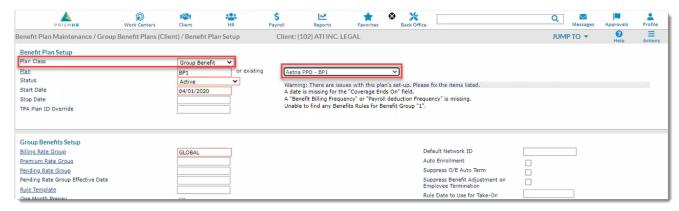
#### To view exported plan information in PrismHR:

1. On the PrismHR Client menu, select Benefit Plan Setup.



The Benefit Plan Setup window displays.

2. Select a **Plan Class** of Group Benefit and select the **Plan** that you exported.



The following field data exports from ClientSpace to PrismHR. Note that all fields may not export if they are not required fields and were not populated in ClientSpace prior to exporting.

You can also access a spreadsheet with list of all of the Benefit Plan fields and Benefit Plan Rules that export to PrismHR by clicking the "ClientSpace to Prism Benefit Plan Export Field Mapping and Benefit Rules (Excel file)" link in theAttachments and Templates article.

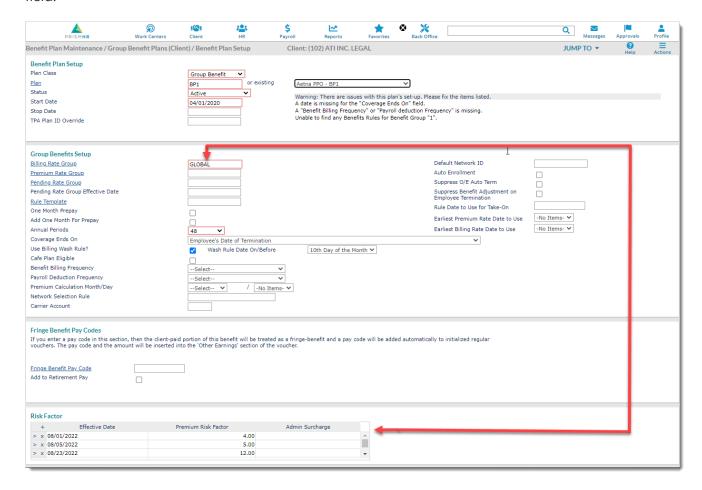
ClientSpace Field	Form	PrismHR Field(s)	Form
Category	gen_BenefitsBenefitPlan	Plan Class	Benefit Plan Setup
UniquePlanCode	gen_BenefitPlan	Plan	Benefit Plan Setup
luSelectionStatus	gen_BenefitsBenefitPlan	Status	Benefit Plan Setup
EffectiveDate	gen_BenefitPlan	Start Date Stop Date	Benefit Plan Setup
FkPlanTierID*	gen_BenefitsBenefitPlan	Billing Rate Group Premium Rate Group Pending Rate Group Pending Rate Group Effective Date	Benefit Plan Setup

ClientSpace Field	Form	PrismHR Field(s)	Form
IsOneMonthPrepay	gen_BenefitsBenefitPlan	One Month Prepay	Benefit Plan Setup
IsAddOneMonthforPrepay	gen_BenefitsBenefitPlan	Add One Month for Prepay	Benefit Plan Setup
luAnnualPeriods	gen_BenefitsBenefitPlan	Annual Period	Benefit Plan Setup
luCoverageEndsOn	gen_BenefitsBenefitPlan	Coverage Ends On	Benefit Plan Setup
luBenefitsBillingFrequency	gen_BenefitsBenefitPlan	Benefit Billing Frequency	Benefit Plan Setup
luPayrollDeductionFrequency	gen_BenefitsBenefitPlan	Payroll Deduction Frequency	Benefit Plan Setup
Percentage**	gen_BenefitPlanTier	Premium Risk Factor Effective Date	Benefit Plan Setup

<sup>\*</sup>Rate Group values must match each other in ClientSpace and PrismHR in order to be set properly by the export. In ClientSpace, the code value in the **Title** field of the Rate Group Detail window is compared to PrismHR Billing Rate Groups list.

<sup>\*\*</sup> In ClientSpace, there is a single **Rate Group** field on the Offered Benefit Plan that holds the value for either a Rate Group or a Risk Factor while in PrismHR there is a Billing Rate Group field for Rate Group and a Risk Factor section for premium risk factors. ClientSpace uses the **Rate Source** field value located on the ClientSpace Rate Group Detail window to determine whether to export into the **Billing Rate Group** field or **Risk Factor** section of the PrismHR Benefits Plan Setup window. If the **Rate Source** field value is "Percentage", it is exported as a Risk Factor. If the **Rate Source** field value is "Manual", it is exported as a Rate Group.

Also note that when a Risk Factor is exported, a value of "Global" is defaulted in the **Billing Rate Group** field.



#### **Related Topics:**

Exporting Benefit Plans to PrismHR

## SIDES ClientSpace Integration Overview

#### What are SIDES and SIDES E-Response?

The State Information Data Exchange System (SIDES) and SIDES E-Response are software tools that empower states, employers, Third Party Administrators (TPAs) and Professional Employer Organizations (PEOs) to quickly, accurately, and securely respond to unemployment insurance requests.

Developed through a strategic partnership between the U.S. Department of Labor (USDOL) and state unemployment insurance (UI) agencies, SIDES and SIDES E-Response offer a nationally standardized format to better anticipate and supply the data needed for responding to UI claim information requests. SIDES is a subdivision of the National Association of State Workforce Agencies (NASWA). NASWA is a governing entity sponsored by the USDOL.

Currently 47 states and 3 jurisdictions participate in SIDES. To learn more about SIDES, visit the website of any participating state or jurisdiction or visit the National Association of State Workforce Agencies SIDES website.

## What about the other SIDES exchanges or "streams"? Does ClientSpace integrate with all of them?

SIDES has six exchanges or "streams" that all work together to support steps in the unemployment insurance claim process:

- Separation Information (SI) Exchange Expedites sending separating information once a claim is filed with the state.
- Monetary and Potential Charges (MPC) Exchange Electronically notifies employers of wages used to setup a claim and allows them to verify correct wages are being used for every claim.
- Additional Fact-Finding (ADF) Exchange Allows states to electronically communicate with employers and TPAs in relation to unique questions during a claim investigation.
- Determinations & Decisions (DD) Exchange Notifies employers of non-monetary decisions electronically and allows quick expediting of appeals.
- Earnings Verification (EV) Exchange Automates audits and responses through automated delivery of requests and outstanding tasks.
- Benefit Charges (BC) Exchange Assists with the detection of improper payments and provides final charge notices electronically at the end of a billing cycle.

Visit the SIDES Solutions page of the Unemployment Insurance Information Technology Support Center (UI ITSC) for more details on SIDES exchanges.

Currently, ClientSpace interface integrates with the Separation Information exchange only. If you are interested in other exchanges, please submit a case so that we can consider it for a future enhancement.

## What is the difference between SIDES E-Response and the SIDES ClientSpace Integration?

SIDES E-Response is a free website where employers and their representatives submit UI responses directly to state unemployment agencies using a PIN provided by each State Workforce Agency where you manage employees. The website is free, only requires an internet connection and is easy to use, but

if you operate in multiple states, you must request credentials from each State Workforce Agency where you manage employees which can be a hassle to manage if you operate in multiple states. SIDES E-Response is best suited for employers or TPAs with a limited number of annual UI claims. If you operate in multiple states or have more than 30 UI information requests per week, SIDES E-Response may not be sufficient for efficiently managing UI responses.

The SIDES ClientSpace integration is an automated data exchange interface between ClientSpace and SIDES and is best suited for larger employers, PEOs, and TPAs who typically deal with more than 30 UI information requests per week <u>or</u> who operate in multiple states. ClientSpace retrieves the claims from SIDES and places them in the correct workspace.

#### How often are claims received from SIDES?

A scheduled process runs every hour to send new claims and amendments. (However, some states may only upload claims once per day.) Note that this is a two-way exchange. Therefore, any updates from SIDES are also received and applied.

#### What are some of the major benefits of using the SIDES ClientSpace Integration?

For larger employers, PEOs, and TPAs who manage many UI claims during the year, there are many benefits to using the SIDES ClientSpace integration. Here are just a few of the major benefits:

• **Direct Import into ClientSpace** - Instead of receiving claims from states the traditional way (via mail) or needing to manage multiple pins to use SIDES E-Response, claims are imported directly into ClientSpace from the state. ClientSpace imports the claims, creates a record for each claim and lists each claim in the Unemployment Claim dashboard of the correct workspace based on the company the claim is associated with and the employee's social security number.

If ClientSpace cannot match the claim to a company and SSN, the claim is listed in the Unemployment Claim dashboard of the Client Services Department workspace. The Client Services Department workspace is treated as a temporary holding workspace where unmatched claims reside until they are researched. After researching an unmatched claim, workflow is in place to allow you to manually move it to the appropriate workspace or process the claim with a relevant response such as "Never Employed Here" or "Fraudulent Claim".

- Standardized Claim Questions The questionnaire (which is standardized across all states) is attached to the ClientSpace claim record on the Separation Information Response tab for ease of reporting.
- On-the Fly Entry Validation and Pre-Submission Validation The responses you enter to key
  fields, such as Preparer Type and Employer reason for separation, determine which fields and
  field sets display. For example, selecting Discharged in the Employer reason for separation
  field triggers the display of the Discharge & Suspension fieldset containing additional relevant
  fields.

You must fill in the required fields before submitting the claim. You should also review all of the optional fields. Optional fields are not required for answering a claim but may be provided to allow you to supply more information. Providing this information may reduce requests from the state for amendments.

If you miss a required field, enter incorrect dates, or miss completing a supporting form (such as Remuneration, Prior Incident, or Witness) that was activated based on your responses, when you attempt to submit the claim, pre-submission validation in ClientSpace runs and may display an error message listing the missed requirements.

Pre-submission validation in ClientSpace saves you time by capturing most missing requirements. SIDES validation captures any remaining missed requirements. **Reply Failure** (SIDES) is an unsuccessful claims status update that you may receive after a claim is sent to SIDES and the SIDES validation revealed a data issue or a missing requirement that was not captured by the ClientSpace pre-submission validation process.

- Employee Record Reference and Wage Auto-fill Efficiency in answering claims is further
  enhanced by being able to quickly open the ClientSpace employee record from within the
  Unemployment Claim record to reference employment details. A Get Wages link in the Action
  Center Workflow allows you to retrieve an employee's wage information from PrismHR and autofill the fields in "Earnings and Schedule" section of the questionnaire (depending on your
  responses).
- **Single Click Submission** Once the questionnaire is completed, clicking **Submit to SIDES** in the Action Center Workflow runs a validation process to ensure the claim is complete and queues a claim response for submission to the state. A scheduled process in ClientSpace runs hourly and picks up any claims that are queued for submission and sends them to the state(s) for processing.
- "Start to Finish" Claims Management Once a claim is submitted, the Claim Status and SIDE Status fields on the claim record are updated as the claim progresses through SIDES processing. For instance, if the state successfully receives the claim and has all the information it needs to begin processing the claim, the status may change from "Queued" to "Decision Pending". All claim statuses are tracked in ClientSpace, including any manual statuses you may set once the integrative part of SIDES claims processing is complete.

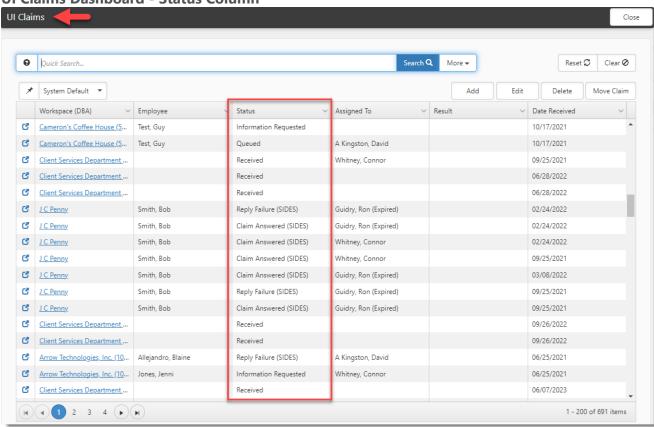
The **Claim Status** field is used for general claims management regardless of whether you are using the SIDES integration. The **SIDES Status** field is a "read only" field that tracks the integrative part of SIDES claims processing only. This allows you to isolate "SIDES only" activities when needed, such as when generating reports.

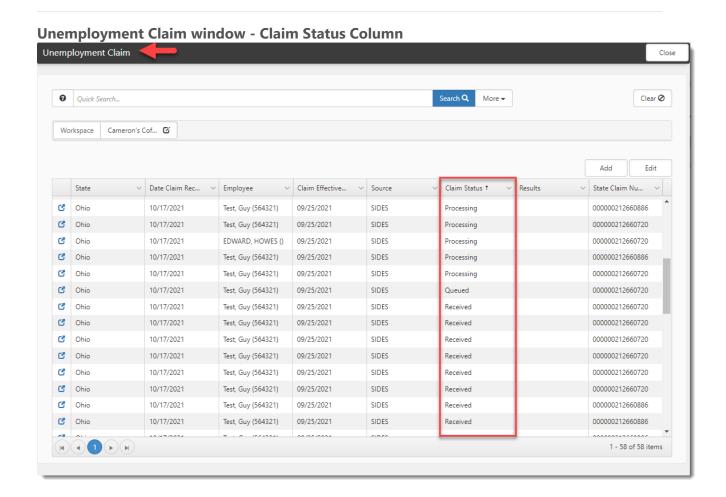
For instance, SIDES may return a final status of "Claim Answered (SIDES)" and a claimant may choose to appeal a decision not in their favor. The process for starting an appeal is not done

through the SIDES integration but you can continue managing the claim in ClientSpace by manually setting a **Claim Status** of "On Appeal".

Access claims and view a claim's current **Claim Status** at-a-glance in two places:

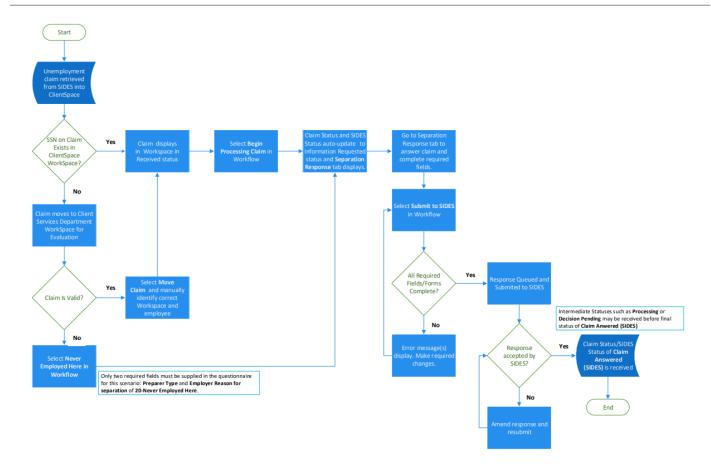
#### **UI Claims Dashboard - Status Column**





#### How do you use the ClientSpace SIDES Integration? What is the workflow like?

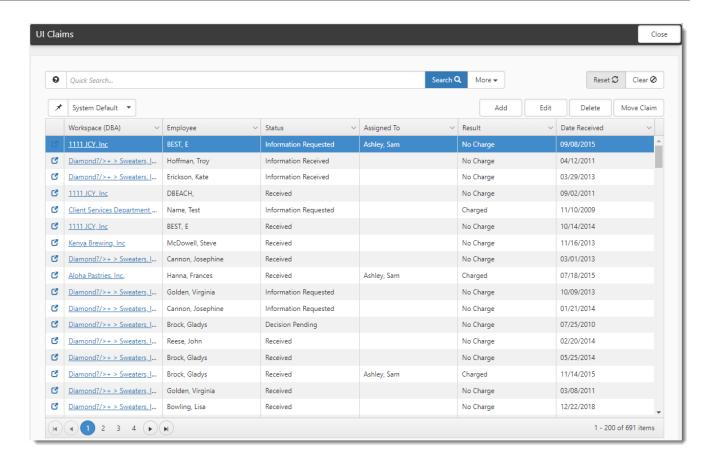
SIDES claims are processed on the UI Claims dashboard or on the Unemployment Claim dashboard of a selected workspace. Let's review highlights of the workflow here. For detailed procedural steps, refer to Processing SIDES Claims.



### **Processing SIDES Claims**

#### To process a new SIDES claim:

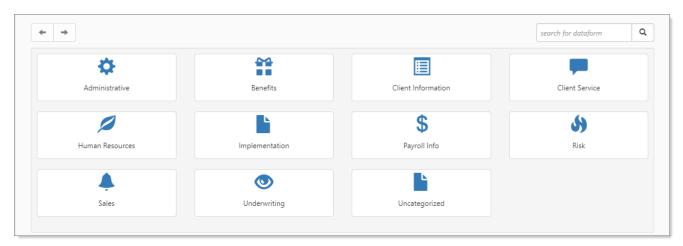
In the modules bar, select **UI Claims**.
 A list of all UI Claims displays.



#### OR

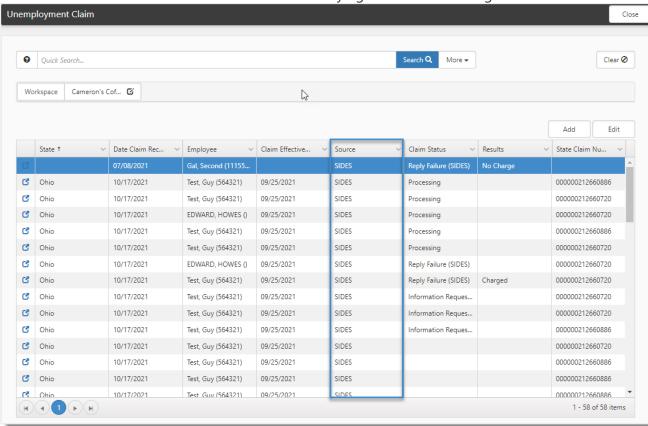
Open a specific workspace and go to the **Unemployment Claim** window to only work on UI Claims received for that workspace.

- a. From the modules bar, click QWorkspaces.
   The Workspace Search dashboard opens.
- Select a workspace and click (Open).
   The Workspace page opens.
- c. Move down the page to the administrative tiles where you see the dataform categories.



d. Enter "Claim" in the *search for dataform* field and then click the Unemployment Claim tile. The Unemployment Claim window displays.

Note: This view includes a Source column for identifying SIDES claims at-a-glance.



2. Locate a SIDES claim to process and open it.

**Note:** New claims have a **Claim Status** and **SIDES Status** of "Received". The **Claim Status** field is used for general claims management regardless of whether you are using the SIDES integration.

The **SIDES Status** field is a "read only" field that tracks the integrative part of SIDES claims processing only. This allows you to isolate "SIDES only" activities when needed, such as when generating reports.

Refer to Managing Unemployment Claims for additional information on searching for claims.

In the Action Center, under Workflow, click Begin Processing Claim.
 The Separation Information Response tab displays. The Claim Status and SIDES Status change to Information Requested indicating that the state requires information (that you will provide on the Separation Information Response tab).

If you need to reference a **Separation Information Response** SIDES field identifier, hover your mouse pointer over the info bubble **1** icon next to a field.

4. On the UI Claim **Home** tab ( ), verify the value displayed in the **Employee Start Date** field located in the "Claim Data" section and manually edit the date, if necessary.

This is the date that will be used as the position start date relevant to the claim. By default, ClientSpace sets the value in **Employee Start Date** using the **Start Date** field value from the most recent employment record. There are instances where this may not be the correct date. For example, if an employee was temporarily laid off for a week and the claim for that layoff period was not processed until after they were rehired, using the **Start Date** of the most recent employment record is not correct as it reflects the recent rehire date instead of the **Start Date** of the position the employee was in at the time of lay off.

5. Click the **Separation Information Response** tab to begin completing the questionnaire, making certain to complete the sections in the order shown so that you can complete the key fields **Preparer Type** and **Employer reason for separation** in the Claim Details fieldset before moving to other sections. Additionally, if you believe the claim to be fraudulent, be certain to check the **Fraudulent Claim?** flag located under **Preparer Type**.

The responses you enter to **Preparer Type** and **Employer reason for separation** determine which other fields and fieldsets display.

Note that in addition to displaying separation reasons, the **Employer reason for separation** field also includes several dispositions for handling invalid claims:

- 20-Never Employed Here
- 21-TPA does not represent this employer
- 22-PEO does not represent this employer

6. Continue completing the questionnaire until all required fields and relevant optional fields are completed.

Optionally, if wage data is required, you can click **Get Wages** in the Action Center under Workflow to auto-fill fields in Earnings & Schedule section from PrismHR instead of entering this information manually. If you need to correct imported wage date OR enter wage information manually, check the **Wage Information Override** flag in the Wage Information section.

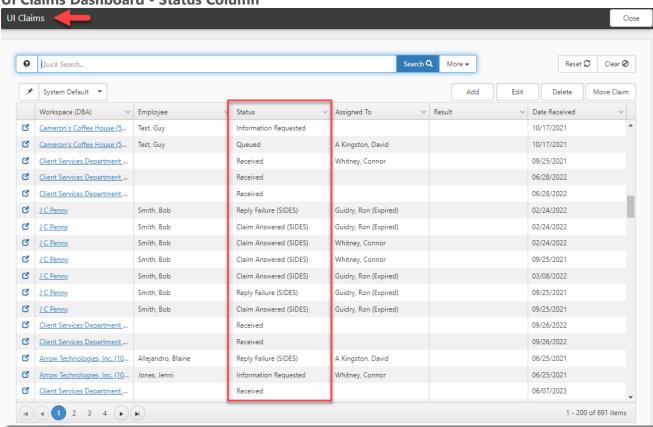
- 7. What do you want to do?
  - Do you want to complete an additional form first, such as a Remuneration form, before continuing with system validation of requirements (which may flag other missing forms and required information)?
    - a. Click **Apply** to save the fields you entered on the **Separation Information Response** tab and keep the claim record open.
    - b. In the Action Center, under **Links**, click **Add** + next to the desired form. The new form becomes the active work item in the Work Center (i.e., left pane). The Claim record remains available in the Work Center and you can return to it once you complete and save the additional form.
    - c. When all known required forms are completed, click **Submit to SIDES**.
       Clicking **Submit to SIDES** starts a validation process to ensure the claim is complete.
      - If responses are valid and no additional required fields or forms are missing, the claim is submitted and the Claim Status and SIDES Status fields are changed to Queued, and you can proceed with step 7.
      - If additional fields or forms are incomplete or there are invalid responses (such as incorrect dates), they will be listed in an error message.
         Continue with these steps before proceeding with step 7.
    - d. Complete or correct required fields listed in the submission error message.
    - e. Complete any remaining required forms listed in the submission error message.
    - f. Click **Submit to SIDES** again to submit the claim.
  - Do you want to continue with system validation of requirements (which will flag missing forms and other required information)?
    - a. Click Submit to SIDES.
       Clicking Submit to SIDES starts a validation process to ensure the claim is complete.
      - If responses are valid and no required fields or forms are missing, the claim is submitted, the Claim Status and SIDES Status fields are changed to Queued, and you can proceed with step 7.

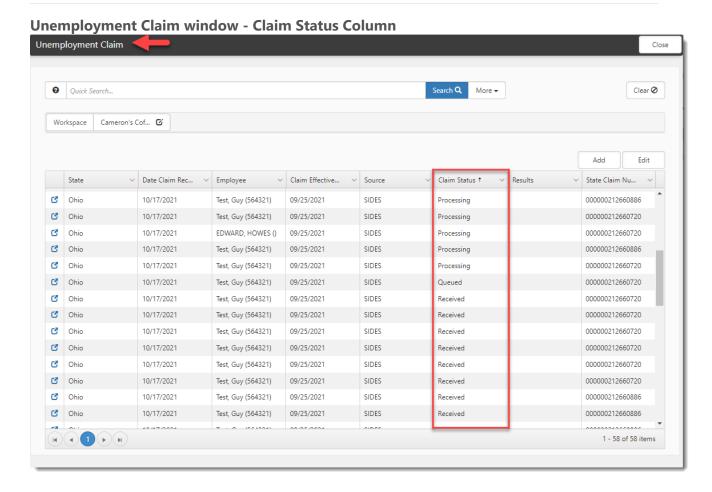
- If fields or forms are incomplete or there are invalid responses (such as incorrect dates), they will be listed in an error message. Continue with these steps before proceeding with step 7.
- b. Complete or correct any remaining required fields listed in the submission error message.
- c. Complete any required forms listed in the submission error message in the Action Center. Under Links, click **Add** + next to the desired form. The new form becomes the active work item in the Work Center (i.e., left pane). The Claim record remains available in the Work Center and you can return to it once you complete and save the additional form.
- d. Click **Submit to SIDES** again to submit the claim.

#### Note:

- The scheduled process to send submitted SIDES claims, receive new SIDES claims, and receive the state's responses to submitted claim runs every hour. Note that some states may only upload claims once per day.
- Sometimes, when a secure connection cannot be made to the SIDES broker, SIDES claims submitted for processing can become stuck in "Processing" status. The system automatically resubmits claims for processing that have been stuck in "Processing" status for more than two hours.
- 8. Check the UI Claims dashboard or the Unemployment Claims window of specific workspaces often for claim statuses and determine an action (if any) based on the status.

#### **UI Claims Dashboard - Status Column**





Refer to SIDES Status Definitions to review the list of SIDES-related statuses and their meanings.

#### **SIDES Status Definitions**

Below is a list of statuses related to SIDES claims and their definitions. These statuses, except where indicated, are used to update both the **Claim Status** and **SIDES Status** fields. The **Claim Status** field is used for general claims management regardless of whether you are using the SIDES integration. The **SIDES Status** field is a "read only" field that tracks the integrative part of SIDES claims processing only. This allows you to isolate "SIDES only" activities when needed, such as when generating reports.

Claim Status	Meaning
Received	<b>Received</b> is the initial status of a claim in the <b>Claim Status</b> and <b>SIDES Status</b> fields when a claim is imported from SIDES into ClientSpace for the first time.
Information Requested	The Claim Status and SIDES Status fields automatically change from Received to Information Requested once you click Begin Processing Claim in the Action Center Workflow section to begin completing the state's questionnaire. This status indicates you are in the process of answering the claim.
Queued	The Claim Status and SIDES Status fields automatically change to Queued after you complete the questionnaire, click Submit to SIDES and the claim passes pre-submission validation in ClientSpace. The claim remains in Queued status until it is exported to SIDES.  Note: The scheduled process to export submitted SIDES claims, import new SIDES claims, and send/receive responses to submitted claims runs every hour. Note that some states may only upload new claims once per day.
Reply Failure (SIDES)	<b>Reply Failure (SIDES)</b> is an unsuccessful status that can occur after <b>Queued</b> status. This status in the <b>Claim Status</b> and <b>SIDES Status</b> fields indicates that the claim was sent to SIDES but when SIDES tried to accept the claim, there was a data issue or a missing requirement that was not captured by the ClientSpace pre-submission validation process.

Claim Status	Meaning
Processing	Processing is an interim procedural status used by the ClientSpace system only. Although it is listed in the Claim Status and SIDES Status drop down lists, it is not a status that you assign. The Processing status is assigned by ClientSpace to identify a claim as already submitted to SIDES so that the scheduled process will skip over it. This prevents duplicated submissions.  Note: Sometimes, when a secure connection cannot be made to the SIDES broker, SIDES claims submitted for processing can become stuck in "Processing" status. The system automatically resubmits claims for processing that have been stuck in "Processing" status for more than two hours.
Amending	The Claim Status and SIDES Status field values automatically change to Amending once you click the Amend the Response link to complete an amendment requested by the state. Clicking Resubmit to SIDES link places the claim back into Queued status in both status fields so that the scheduled process can send the amendment to SIDES.
Decision Pending	The <b>Decision Pending</b> claim status is not specific to SIDES claims, but is used for claims management, including SIDES claims management. In relation to SIDES claims, <b>Decision Pending</b> is the status received from SIDES after SIDES has received the claim and has all the information required to make a decision on the claim. This status often follows the <b>Queued</b> status (if the claim was successfully submitted) and is reflected in both the <b>Claim Status</b> and <b>SIDES Status</b> fields.

Claim Status	Meaning
Claim Answered (SIDES)	Claim Answered (SIDES) is a successful status received from SIDES indicating that the claim has been processed and the PEO has satisfied the response. Note that this may or may not indicate a final claim disposition. It is, however, the last automatically applied status to the Claim Status and SIDES Status fields. For example, if a claimant contests a decision that is not in their favor and wants to file an appeal, you may initiate an appeal and manually change the status from Claim Answered (SIDES) to a different status (such as On Appeal).
On Appeal, Determination, and other statuses	You may see other statuses listed in the <b>Claim Status</b> lookup list. These statuses are manual statuses used for general claims management and <b>may vary depending on your configuration</b> . If you manually apply one of these statuses in the <b>Claims Status</b> field, it will not affect the <b>SIDES Status</b> field since it is only used to track the SIDES integrative process only.  For example, as mentioned in an earlier example, you could set a contested claim to <b>On Appeal</b> when a claimant files an appeal Then, once all appeals are exhausted and the state makes a final determination, you could set the claim status to <b>Appeal Determination</b> .

#### Helpful Hints: State Information Data Exchange System (SIDES)

Below are some helpful hints to guide you in completing the SIDES questionnaire.

**Note:** Whenever a field from the SIDES questionnaire is listed, it appears in bold text with its SIDES field identifier shown in parentheses. If you need to know an identifier while completing **Separation Information Response** tab, hover your mouse pointer over the info bubble **3** icon next to a field.

- 1. Remuneration forms are required if **Did the claimant have remuneration?(B-74)** is "Yes". Up to 15 Remuneration forms are allowed.
- 2. Pension and 401K forms are required if **Is/will the claimant receive a company pension/401K disbursement?(B-210)** is "Pension", "401K" or "Pension and 401K".
  - a. If the answer is "Pension", a record with a type of "Pension" is required.
  - b. If the answer is "401K", a record with a type of "401K" is required.
- 3. The Witnesses form is required when **Were there witnesses?(B-157)** is "Yes".

- 4. Prior Incidents are required if **Were there prior incidents?(B-94)** is "Yes". Up to 5 Prior Incidents forms are allowed.
- 5. The Failed to Report form is required if **Resignation reason** is "Failure to Report for Work/Abandonment".
- 6. The External Contacts form is optional and is only sent if Is/was the claimant receiving WC?(B-201) is "Yes" or Is/will the claimant receive a company pension/401K disbursement?(B-210) is "Pension", "401K" or "Pension and 401K".
- 7. The Previous Temp Assignments form is required if **Why is the claimant not working on an assignment?(B-195)** is "Assignment completed, contact established, claimant declined new assignment". Up to 5 Previous Temp Assignment forms are allowed.
- 8. If the claimant is working a temporary assignment for a Temporary Staffing Agency, checking **Temporary staffing employer/assignment(B-246)** triggers the display of additional questions requiring a response to the state.
- 9. If you believe the claim is fraudulent, check **Fraudulent Claim?(B-225)**. This triggers the display of additional questions requiring a response to the state that you must answer along with any other required information on the dataform.
- 10. Attachments may be sent by the states and added to the claim via the Action Center for you to complete and return to the state. The state sends these forms for one of the following reasons:

Reason	Explanation
Informational only (Not Claimant or Employer specific)	The state may request information regarding the process that is not employer or claimant specific.
Informational only (Claimant or Employer specific)	The state may request information regarding the employer or claimant that is not being captured on the <b>Separation Information Response</b> tab or on other relevant supporting forms.
Requires Action (State Standard question set)	The state may have questions about your answers to the standard question set. These must be reviewed and answered.
Requires Action (Adhoc questions added by the state)	The state may have adhoc questions not related to the standard question set. These must be reviewed and answered.
Optional Fact Finding	The state may have fact finding questions. These are optional informational questions that are not required for submitting an initial response.

- 11. **Is/was the claimant receiving WC?(B-201)** is optional. However, if answered, it will trigger the display of other required questions which must be answered before you can submit the claim.
- 12. 20, 21, and 23 should only be selected in the specific situations outlined below:

Separation Reason	Use When
20	The claimant was never employed by the employer.
21	The claimant's employer is not currently represented by the TPA.  Note: This option is only available for selection when <b>Preparer</b> Type(B-52) is "Third-Party Administrator".
23	The claimant's employer is not currently represented by the PEO.

- 13. The checkbox **Do you want to send the employer's contact information to the State?** is optional and only shows if **Employer reason for separation(B-20)** is "21-TPA does not represent this employer" or "23-PEO does not represent the employer". If checked, the following information is sent to the state:
  - Employer's name (Organization Name)
  - Employer Contact Name (Primary Contacts Name)
  - Phone number (Organization Phone)
  - Street Address (Organization Address)
  - City (Organization City)
  - State (Organization State)
  - ZipCode (Organization ZipCode)
  - Contract Termination Date (From most recent termination record that is active)
- 14. Selecting "99-Not providing/Refusing to provide" as **Employer reason for separation (B-20)** to answer a claim is permitted. However, SIDES views this response unfavorably. You should avoid using this code as SIDES may respond by discontinuing access to their API.

#### Moving a SIDES Claim

The process of moving a SIDES claim is the same as moving any UI claim in ClientSpace. The only difference is that ClientSpace attempts to match SIDES claims to the correct workspaces for you initially.

Therefore, in most cases, the only claims requiring a manual move to a new location are the ones that could not be automatically matched to the correct workspace.

When ClientSpace cannot match a claim by company and SSN, the claim is listed in the Unemployment Claim dashboard of the Client Services Department workspace. The Client Services Department workspace is treated as a temporary holding workspace where unmatched claims reside until they are researched. After researching an unmatched claim, workflow allows you to manually move it to the appropriate workspace or process the unmatched claim in the Client Services Department workspace with a relevant response, such as "Never Employed Here" or "Fraudulent Claim".

The steps to move a claim from the UI Claims dashboard are located in the Move Unemployment Insurance Claims section of the Managing Unemployment Claims topic.

#### Amending a SIDES Claim

After the initial submission of a SIDES claim to the state, the state may request an amendment so that you can provide additional information. The amendment is requested external to ClientSpace.

#### To amend a SIDES Claim:

- In the Action Center, under Workflow, click the Amend the Response? link.
   An Amended Response fieldset displays at the top of the page. A field containing the amended response count auto-populates.
  - **Note:** A claim can be amended up to 9 times.
- 2. Complete the **Description** field. Enter the reason for the amended response or a brief description of what is being changed.
- 3. Make any other changes as necessary. **Note:** Changes can be made to fields already answered if information has changed.
- 4. After changes are made and ready to be submitted, click **Resubmit to SIDES** link to put the claim back into Queued status. The scheduled process picks up the changes and sends them to the state.

## Chapter 21

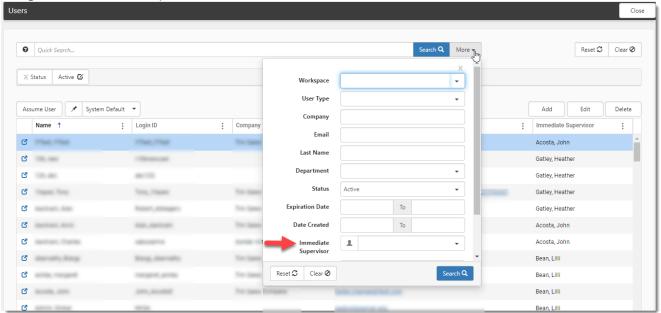
## Security

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.

#### **Users Dashboard**

Use the Users Dashboard to manage user profiles for users. A Global Admin can use the Users Dashboard to:

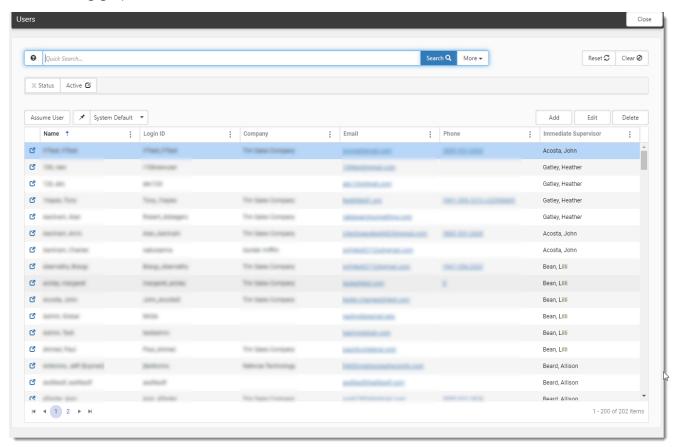
- Search for a single user.
- Search for a group of users. You can, for instance, search for users by **Department** or search for a group of users by **Immediate Supervisor** to locate a smaller subset of users within a department using the **More** search option.



- · Add or Edit user accounts.
- Manage licenses.

- Assign a user template and assume a user profile for testing.
- Reset a user password and unlock a user.

The following graphic illustrates the **Users** dashboard.



#### **Related Topics:**

• Viewing the User Audit Trail

## Adding and Editing User Accounts

## Chapter 22

## Multi-tenant Environments in ClientSpace

ClientSpace supports multi-tenant environments whereby an install has multiple Prism API configurations and where the **Client Number** may not be unique across Prism database instances.

**Note:** Contact ClientSpace Professional Services to implement multi-tenancy configuration. **Do NOT try to implement this feature without ClientSpace Professional Services.** Attempting to implement this feature on your own can lead to major problems with ongoing imports.

## Where is multi-tenancy enabled?

Multi-tenancy is enabled in **System Admin > Administrative Data > PEO Configuration** by setting the **Use Multi-tenancy** field database. There are other requirements that must be set up by Professional Services.

#### How multi-tenant API feeds work

#### **Importing**

ClientSpace imports data from multiple PrismHR databases into the appropriate workspaces by combining the **PEO ID** and the **Client Number** values into an **Import ID** on the Client Master record. The **ImportID** follows the format PEOID::ClientNumber (for example, PEOSolutions::165 signifies the PrismHR database installation for PEO Solutions and **Client Number** 165 from that database). ClientSpace uses this **ImportID** format to ensure that the system imports client data to the correct workspace when importing the data from multiple PrismHR databases.

Additionally, you can control whether a new workspace is automatically created from an import file for each PrismHR API feed individually using a **CanCreateWorkspaces** API parameter in PrismHR API import map detail settings (**System Admino** > **Advanced** > **API Configuration**). See the Additional Parameters section of Ongoing Imports: Configuring the API for Import Map Details for more details.

#### **Exporting**

Client data can be exported from the Client Master record in ClientSpace to PrismHR in multi-tenant environments. When **Export Client to Prism** is clicked on the Client Master to export the client data, the **PEO ID** on the Client Master and the **Secondary ID** on the API Config forms are used to determine the correct Prism instance. The two field values must match.

**Note:** There is error handling to check for a missing **PEO ID** or an invalid **PEO ID** (whereby the **PEO ID** on the Client Master does not match the **Secondary ID** on the API Configuration.)

- If the PEO ID is missing, the following error message displays: "Your export cannot be completed without a PEOID. Add the correct PEOID on the Client Master so we know where to export this."
- If the PEO ID is invalid, the following error message displays: "The PEOID '{PEOID}' on this client's Client Master is invalid. Please correct the PEOID on the Client Master before trying to export this again."

### How multi-tenant business rules are applied

The ClientSpace business rules engine contains a **Workspace Templates** field in the Manage Rules configuration to support multi-tenancy:



This field allows you to configure rules to only be triggered when the executing dataform was created from one of the selected workspace templates. If no specific template(s) are selected, the **Workspace Templates** field will default to "All Templates".

#### Client Master Import ID Validation

Two of the business rules, **SE\_ValidateClientNumberChange** (soft error validation) and **HE\_ValidateClientNumberChange** (hard error validation), are used in both multi-tenant and single-tenant environments to validate a change to the **Client Number**. In a multi-tenant environment, these rules also trigger when a change is made to the **PEO ID** since **PEO ID** is a component of the **Import ID**. In a multi-tenant environment, changes to either the **PEO ID** or the **Client Number** could cause client data imports to stop working.

**Note:** Both rules also require the Client Master status to be Client, Pending Termination or Terminated for triggering to occur.

If you are using Soft Error validation ( **SE\_ValidateClientNumberChange**) with **Use Multi-Tenancy** enabled, the following messages are used when a user changes the **PEO ID**, the **Client Number** or both the **Client Number** and **PEO ID**, respectively:

- "Changing the PEO ID will cause the Import ID's and Employee Identifiers to be regenerated, which could affect imported data. Are you sure you want to continue?"
- "Changing the Client Number will cause the Import ID's and Employee Identifiers to be regenerated, which could affect imported data. Are you sure you want to continue?"
- "Changing the Client Number or PEO ID will cause the Import ID's and Employee Identifiers to be regenerated, which could affect imported data. Are you sure you want to continue?"

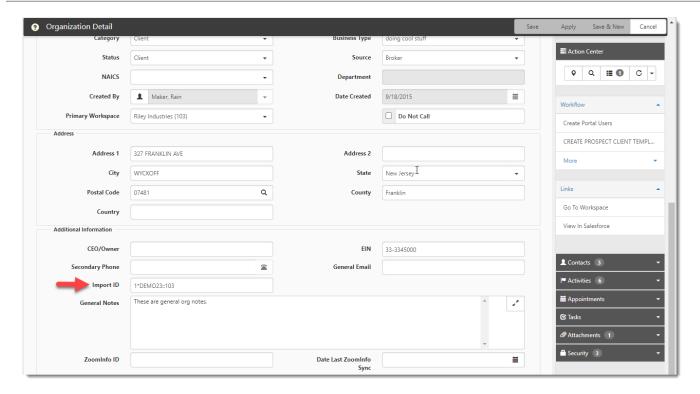
If you are using Hard Error validation (**HE\_ValidateClientNumberChange**) with **Use Multi-Tenancy** enabled, the following messages are used when a user changes the **PEO ID**, the **Client Number** or both the **Client Number** and **PEO ID**, respectively:

- "The PEO ID cannot be changed after the Status is set to Client."
- "The Client Number cannot be changed after the Status is set to Client."
- "The Client Number or the PEO ID cannot be changed after the Status is set to Client."

#### **Organization ID Updates**

The **SetOrgImportID** rule writes the **PEO ID** and **Client Number** field values from the Client Master record to the Organization Details record **Import ID** field in the same format used on the Client Master record: PEOID::ClientNumber.

See an example in the image below:



#### The rule is triggered when:

- The Client Number and PEO ID on the Client Master record are populated (i.e., not empty).
- A change occurs (i.e., an "Is Dirty" condition exists) on Client Number and/or PEO ID on the Client Master record.

#### Note:

- If the status of the Client Master record is Client, Pending Termination or Terminated and the HE\_ ValidateClientNumberChange business rule is Active, hard error validation will trigger when changes are made to the PEO ID or Client Number in multi-tenant environments and prevent updates from being saved to the PEO ID or Client Number. If this happens, the SetOrgImportID rule cannot trigger.
- Though the SetOrgImportID rule was created for multi-tenant sites, enabling Use Multi-Tenancy (System Admin → > Administrative Data > PEO Configuration) is not required for the rule to work.

## Benefits Batch, Benefit Group, and Employee Benefits Detail Import ID Updates

To support the benefit renewal process in multi-tenant environments, business rules are configured to use the **SetImportID** business rule method to set the **Import ID** on the Benefits Batch, Benefits Group,

and Employee Benefits Detail dataforms.

For the Benefits Batch form:

- The rule is triggered when Client Master **Import ID**, Benefits Batch **Effective Date** and Benefit Batch **Type** are not empty and the Benefits Batch **Effective Date** or Benefit Batch **Type** is updated.
- If any of the required values are empty, the **Import ID** field is empty.
- The Import ID is created by combining the Client Master Import ID, Benefits Batch Effective Date and Benefit Batch Type values.
- The **ImportID** follows the format {ClientMaster.ImportID}- {BenefitBatch.EffectiveDate} {BenefitBatch.luType}.

**Example: PEOSolutions::165-20240101-RFP** where PEOSolutions::165 signifies the Client Master **Import ID**, 20240101 signifies Benefits Batch **Effective Date** and RFP signifies the Benefits Batch **Type**.

For the Benefit Group form:

- The rule is triggered when Client Master **Import ID** and Benefit Groups **Group Code** are not empty and either of these fields is updated.
- If any of the required values are empty, the **Import ID** field is empty.
- The **Import ID** is created by combining the Client Master **Import ID** and **Group Code** values.
- The **ImportID** follows the format {ClientMaster.ImportID}-{OfferedPlanClassification.ClassificationCode}.

**Note:** The OfferedPlanClassification.ClassificationCode is the **Group Code** on the Benefit Groups form.

**Example: PEOSolutions::165-Main** where PEOSolutions::165 signifies the Client Master **Import ID** and Main signifies the **Group Code** value from the Benefit Groups form.

For the Employee Benefit Detail form:

- The rule is triggered when Client Master **Import ID** and **Employee Identifier** are not empty and the **Plan ID**, **Effective Date**, **IsActive** checkbox, **Employee ID** or Client Master **Import ID** is updated.
- If any of the required values are empty, the **Import ID** field is empty.
- The **Import ID** is created by combining the Client Master **Import ID**, **Employee Identifier**, **Plan ID** and **Effective Date** values.

• The **ImportID** follows the format {ClientMaster.ImportID}- {Employee Identifier} - {Plan ID} - {Effective Date}.

**Example: PEOSolutions::165-D456477-645-20240423** where PEOSolutions::165 signifies the Client Master **Import ID**, D456477 signifies the **Employee Identifier** from the Employee record, 645 signifies the **Plan ID** from the Employee Benefits Detail form and 20240423 signifies the **Effective Date** from the Employee Benefits Detail form.

#### How the PrismHR link works

When you click the **PrismHR** link on the Workspace Landing page to connect to PrismHR, ClientSpace uses the **PEOID** field value from the workspace's Client Master dataform to identify the correct PrismHR instance to log into.

## How searching for clients works in a multi-tenant environment

Since the **Client Number** will not always be unique across the PrismHR databases in a multi-tenant environment. The **PEO ID** serves as a secondary ID that you can use to filter by on the following module dashboards:

- Cases
- Clients
- Employees
- WC Claims
- UI Claims
- Benefits Batch Search

**Note:** Even if the **PEO ID** is not unique, a search that includes the **PEO ID** may help to narrow your results.

The **PEO ID** field in the **More** search of these dashboards is a Text datatype field. You must type the entire **PEO ID** when filtering. The search requires an exact match to return results.

You can also add the **PEO ID** column to these dashboards. By default, the **PEO ID** column is hidden.

Add it by clicking the vertical three dot (i.e., Kebab) icon on any column heading and selecting **PEO ID** on the **Columns** list:



## How the Email Integration feature works in a multi-tenant environment

Email integration processes an external email account and creates a Client Service Case (dataform). Part of this process requires ClientSpace to determine the correct workspace for case creation. In a single-tenant environment, the body of an email 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++++.

In multi-tenant environments, the **CLID** includes both the **Client Number** and the **PEO ID** from the Client Master record of a workspace in the following format:

#### PEOID::ClientNumber

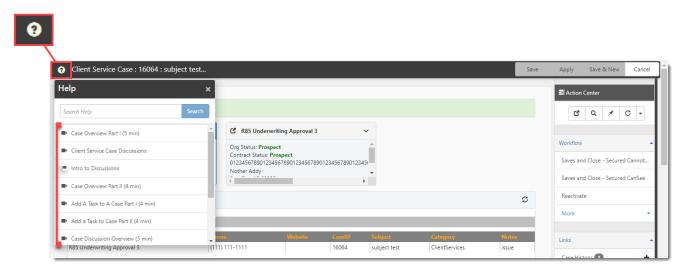
Note that this is the same formatting convention of the workspace **Import ID** used to import data from multiple PrismHR databases into the appropriate workspaces. Just as with an **Import ID**, including both the **Client Number** and the **PEO ID** in the **CLID** ensures that the correct workspace in the correct Prism database instance is identified. Also see Email Integration Processing.

# Chapter 22 Configuring Custom Help Links

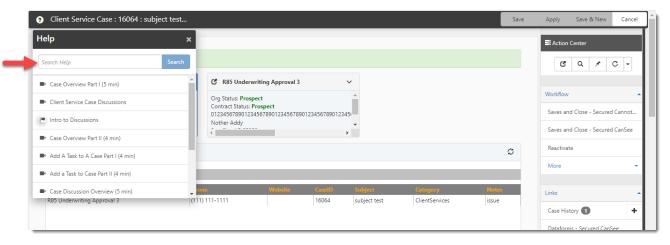
### What Are Help Links?

Anywhere you see a white circle with a question mark ? , it indicates the availability of Help.

- When accessed from the Work Center, ClientSpace Help Center opens.
- When accessed from a dataform, it opens a list of Help links that are specific to the form from which they are accessed.



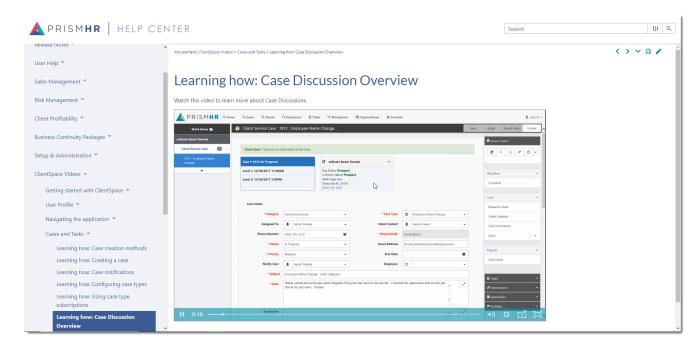
You can also use the general search function located at the top of the list of links if the topic you need is not listed.



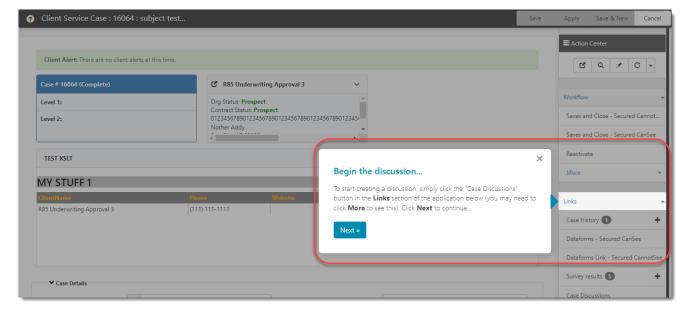
Pre-set links can take the form of:

- Help topics
- Videos
- Call outs

When you click a link, topics and videos display in the ClientSpace Help Center on a separate tab of your browser:



If the link is to a callout, it displays on the dataform you are viewing. These are typically used to describe how a single field is used. The field being "called out" is highlighted while the other dataform fields are temporarily dimmed and inaccessible until you close the box:



# What Are Custom Help Links?

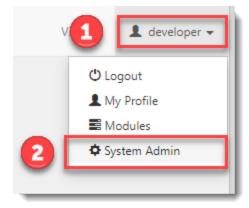
Help links can be a combination of preset Help links that were already configured for you in ClientSpace when it was installed <u>and</u> custom Help links that you define. You must be a Global Administrator to configure custom Help links. The custom Help link can be a URL to an article, video, or guide.

When you configure the custom Help link, you can apply settings such as when you want the link to become available, an "expiration date" for a link (if applicable) and which department(s) have access to the link.

# Configuring Custom Help Links

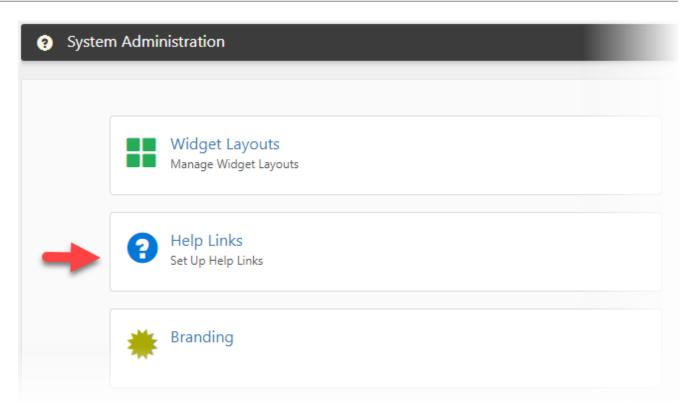
## To configure custom help links:

- 1. Click your username in the top right corner of the ClientSpace window. EX: developer
- 2. Click **System Admin**.



The System Administration dashboard opens.

3. Click **Help Links**.



The search view for all Help links in the ClientSpace system displays.

- 4. Click **Add** to add a new Help Link.
- 5. Complete the fields as appropriate. Required fields display in red text, preceded by an asterisk.

Target Type	Select the form (i.e., Case History, Client Master, etc.) where you want the link to display from the drop down list.
Sort Order	Prioritize where the item displays in the list of other Help links. The higher the number, the lower it is on the list.
	<b>Note:</b> Leave the field set to 0 to sort in alphabetical order.
Link Text	Type the name of the Help link. This is what displays in the list of Help links.
Detail	Type the URL of the link.
Туре	Select the type of Help link: Article, Video, or Guide.
Category	Unused field.
Publish Date	The date you want the Help link to begin displaying. By default, the field auto-fills when the current date and time but you can edit the field.

Expiration Date	The date you want the Help link to stop displaying. The link will not be visible on or after the date you enter. Leave the field blank if the link should never expire.
Active	By default, the <b>Active</b> checkbox is checked. Remove the check mark to make the Help link InActive. InActive links are no longer displayed in the list of Help links.
Department(s)	To restrict which users see the Help link, click in the field to display the list of departments and select a department. To select multiple departments, repeat the action of clicking in the field and selecting a department until all desired selections are displayed in the <b>Department(s)</b> field.

## 6. Click **Apply** or **Save**.

# Chapter 23

# **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.

- 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 1.
- 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 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.

Application Error: "An error has occurred on this page - please notify support if this error persists."

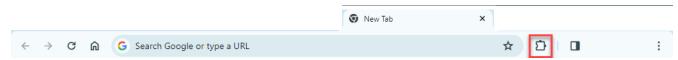
**Problem**: You are moving from tab to tab on an Email Template and the error message above displays.

**Cause**: Compatibility issue with LastPass Chrome Extension.

**Solution 1**: Adjust Chrome Extension Settings.

**Note:** This solution is recommended as it always works to correct the issue by preventing the extension from running on the ClientSpace site. As an added bonus, ClientSpace input fields will no longer have a LastPass icon displayed in them.

1. In Chrome, click the **Extensions** icon.



2. Select Manage Extensions.

The Extensions page opens to the **My Extensions** tab.

- 3. Click the **Details** button on the LastPass: Free Password Manager tile.
- 4. Scroll down to the Site Access section and change the value in the **Allow this extension to read** and change all your data on websites you visitfield to On Click.

**Solution 2**: Adjust LastPass Options.

**Note:** This solution may not work every time. If a user clicks rapidly through Email Template tabs, the error may still occur. Additionally, while LastPass does have a Never URLs option, it will not disable the extension. Therefore, the error may still occur and all input fields will still display a LastPass icon.

- In LastPass, select Options > Advanced.
- 2. Enable the Respect AutoComplete=off: allow websites to disable Autofill check box.

## 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.

- 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.
- 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.

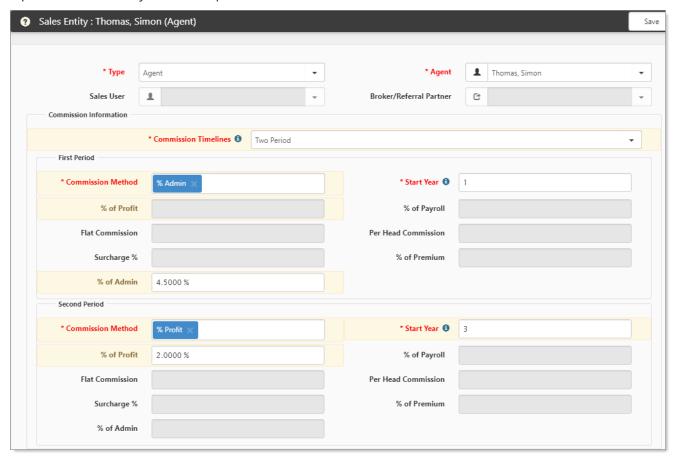
Calculated Commissions missing from Pricing Console Profit Matrix

**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.

- 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**

- 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

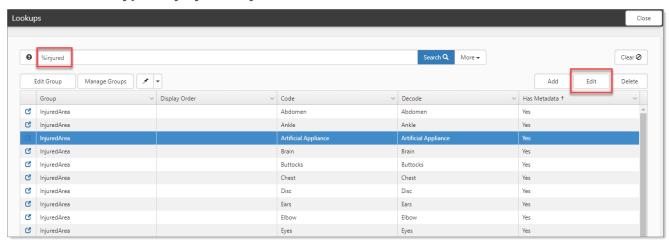
**Problem**: The cause, nature, or body part drop-down list is not appearing when filling out a Workers' Compensation Claim.

**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.

Go to System Admin ♥ > Lookups.

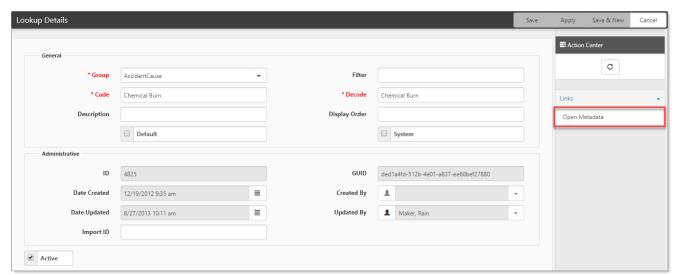
The Lookups dashboard opens. The lookup groups that correspond with the three lookup fields are **AccidentCause**, **TypeofInjury**, and **InjuredArea**.



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.
- 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.

- 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.

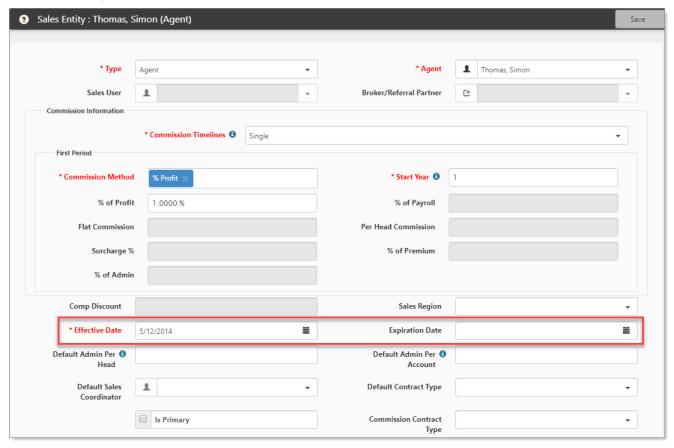
Commissions not included in gross profit calculations

**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.

- From the modules bar, select **Admin Workspace**.
   The Admin Workspace tiles display.
- 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.

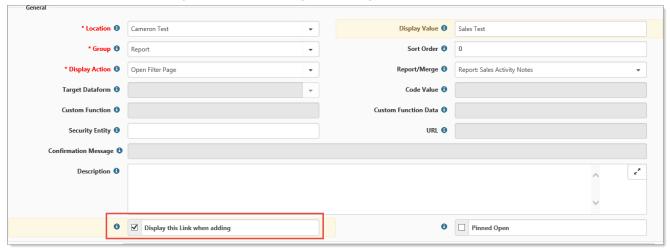
**Cause**: The dataform is a single form and has actually not yet been saved. Because the system dynamically generates the fields when you open the dataform, it looks like the form is there, when there is no copy of the form attached to the workspace.

**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.

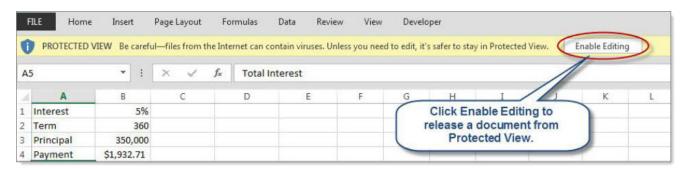
- 1. The ServiceCaseNotification scheduled process needs to be configured to fire at or less than the lowest escalation time, otherwise you can create cases with 1 hour escalations but the notifications will only cue up for the next run of the scheduled process.
- 2. To be notified, the user needs to 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.
- 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.



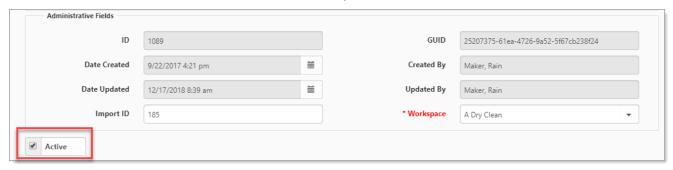
Dataform or Task fields do not enable

**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
- 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.

- 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.

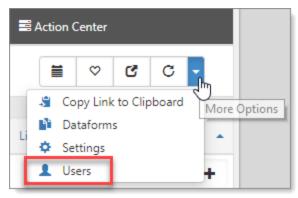
**Solution**: Add the user account to the template user list.

## 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.

Go to System Admin → > Workspace Templates.
 The Workspace Template Search dashboard opens.

- 2. Open the workspace template in question. The template opens.
- 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.

- 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.

Pricing cannot be generated because a Pricing Policy cannot be determined for a state

**Problem**: When creating pricing by using the Add State and Code approach with a contract type set to use state master, the system displays an error indicating that the pricing policy cannot be determined.

The following message is an example for the state of Texas:

"The Pricing cannot be generated because a Pricing Policy cannot be determined for TX. Please contact your system administrator."

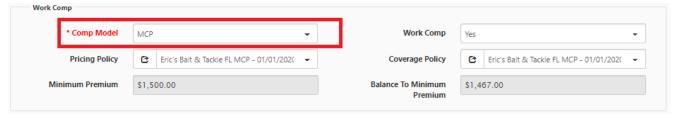
**Cause**: The system cannot determine the policy to use since the state is not set to use a default policy for the selected Comp Model on State Pricing, and the contract type is set to use the state master.

#### Solution:

 On the Pricing Console for the workspace, select the state in the State column of the State and codes section.



2. On the **Pricing State** console, determine the value in the **Comp Model** field of the **Work Comp** section.



## If the **Comp Model** field contains:

- **Master**, the system is attempting to use the value from the **Default Master Comp Policy** field on the State Master, but that field is empty.
- **Client**, the system is attempting to use the value from the **Default Base Client Policy** field on the State Master, but that field is empty.
- MCP, the system is attempting to use the value from the **Default Base MCP Policy** field on the State Master, but that field is empty.
- 3. Go to System Admin > Administrative Data > State Master.

- 4. Select the state.
- 5. Select an item or add a new item in the **Default Master Comp Policy** field and **Save** the record. The system will now create pricing by using the pricing policy default indicated by the Comp Model and the state.

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 **user filtered by role** (element type) field on the **Client Team** dataform by completing the following:

  - Edit the **Client Team** dataform
  - Select Fields in the Action Center.
  - Open the field for the role.
  - Select the Advanced Settings property. The role is represented by the alphanumeric string stored in the Advanced Settings field.
- 2. Copy the info in the **Advanced Settings** field and go to **System Admin** > **Security** > **Roles** and find the Role ID that was stored in **Advanced Settings**.
- 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.

**CASE 3:** Edit Advanced Settings and set the "ShowInactiveUsers" parameter to false:

- 1. Open the field for the role by completing the following:

  - Edit the Client Team dataform
  - Select Fields in the Action Center.
  - Open the field for the role.

- 2. Select the **Advanced Settings** property.
- 3. Add the "ShowInactiveUsers":false parameter to the Advanced Settings field and click Save.
- 4. Save the changes to the field.

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.

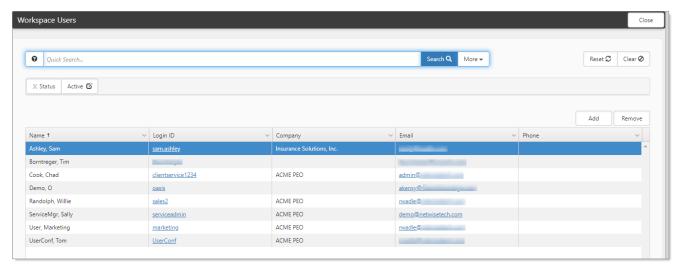
**Solution**: The Send Notifications business rule is core functionality of ClientSpace, which controls all case notifications. You may want to consider cleaning up the Departmental Admin Roles in ClientSpace to remove non-essential users. If this does not fit your business model, log an Extranet case 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 1**. The list of users with access to the workspace are displayed.
- 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 1**.
- 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 reattach 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.

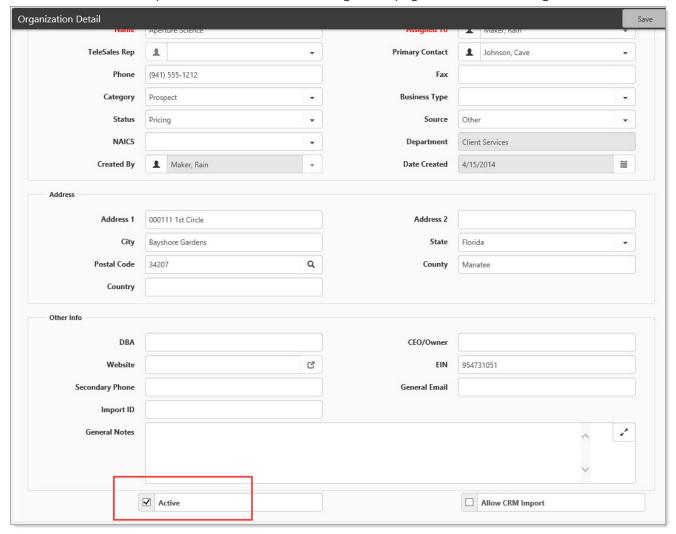
Workspace / Organization missing from search

**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.

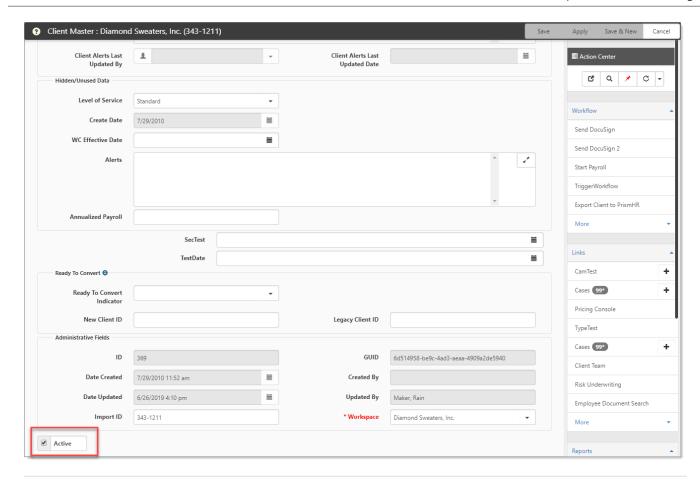
**Cause**: Org / Workspace has been marked as Inactive.

#### 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:

- 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.
- 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.
- 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.

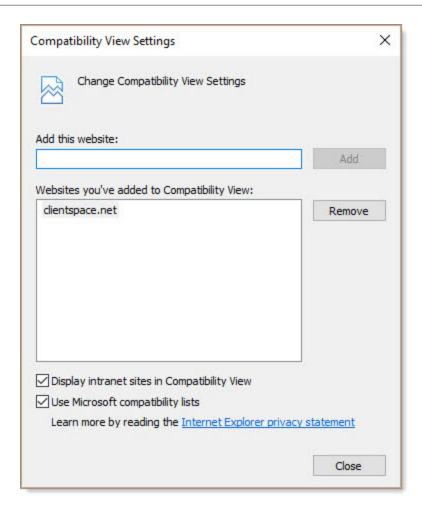
Additional considerations for Internet Explorer 10+: With Internet Explorer 10 and up, Microsoft made some major changes to the way the browser handles JavaScript and other web technologies, which can cause unexpected behavior in the application. To avoid these issues, you should set your browser to 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.

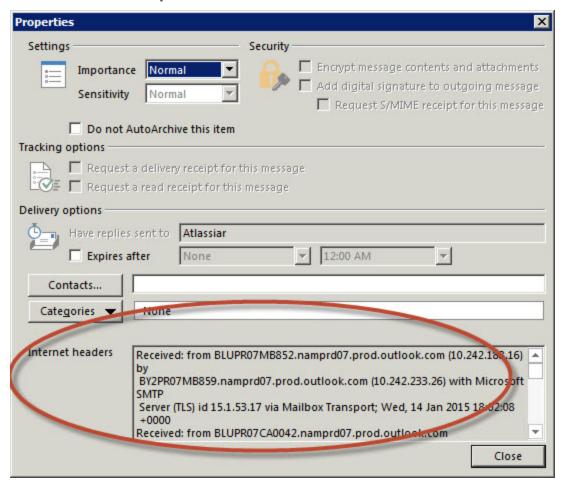
Edit Case or Task missing from Outlook button bar

**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.

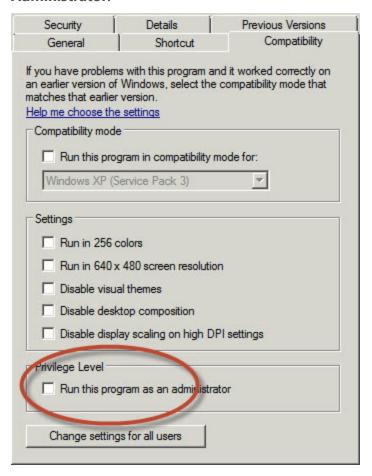
Outlook add-in disables each time Outlook restarts

**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:

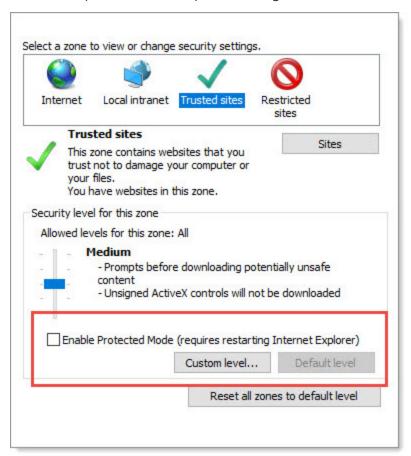
- 1. Close any instances of Outlook
- 2. Find the shortcut icon used to open Outlook.
- 3. Right-click the icon and choose **Properties** > **Shortcut** > **Advanced** and select **Run as Administrator**.
- 4. **Save** your changes.
- 5. Re-open Outlook.
- 6. If the Add-in is not enabled, enable it.

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.
- 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

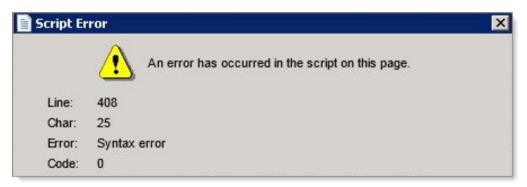
**Solution**: Create a support ticket with PrismHR. Recycling the Application pool on your site manually will often resolve these intermittent issues.

#### **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.

<b>Error Code</b>	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."

# Error messages: ClientSpace and PrismHRAPI Staffing Placement Refresh

When ClientSpace cannot communicate with the PrismHR API while using the "Refresh Placement List" functionality, an error message is displayed: "Unable to retrieve list (Error Code: {Error Code}). Please contact your ClientSpace Administrator."

Use the following table for the Error Code and its meaning.

Error Code	Meaning	Message
Error [900]	(no "peo_id" in querystring and no "Secondary ID" found on "PRISMHRAPI" APIConfig)	Unable to retrieve list (Error Code: 900). Please contact your ClientSpace Administrator.
Error [901]	(could not retrieve APIConfig by AppCode)	Unable to retrieve list (Error Code: 901). Please contact your ClientSpace Administrator.
Error [902]	(could not obtain a LoginResponse via APIConfig endpoint)	Unable to retrieve list (Error Code: 902). Please contact your ClientSpace Administrator.
Error [903]	(obtained a LoginResponse but no PlacementList returned via clientID & employeeID)	Unable to retrieve list (Error Code: 903). Please contact your ClientSpace Administrator.

Error Code	Meaning	Message
Error [904]	(obtained PlacementListXml but no PlacementListResponse node)	Unable to retrieve list (Error Code: 904). Please contact your ClientSpace Administrator.
Error [905]	(no "peo_id" in querystring and no "Secondary ID" found on "PRISMHRAPI" APIConfig)	Unable to retrieve list item (Error Code: 905). Please contact your ClientSpace Administrator.
Error [906]	(could not retrieve APIConfig by AppCode)	Unable to retrieve list item (Error Code: 906). Please contact your ClientSpace Administrator.
Error [907]	(could not obtain a LoginResponse via APIConfig endpoint)	Unable to retrieve list item (Error Code: 907). Please contact your ClientSpace Administrator.
Error [908]	(obtained a LoginResponse but no Placement returned via vendorID, staffingClient, placementID)	Unable to retrieve list item (Error Code: 908). Please contact your ClientSpace Administrator.
Error [909]	(obtained PlacementXml but no PlacementResponse node)	Unable to retrieve list item (Error Code: 909). Please contact your ClientSpace Administrator.

# **Related Topics**:

- Refreshing the Staffing Placement List
- Staffing Placement dataform

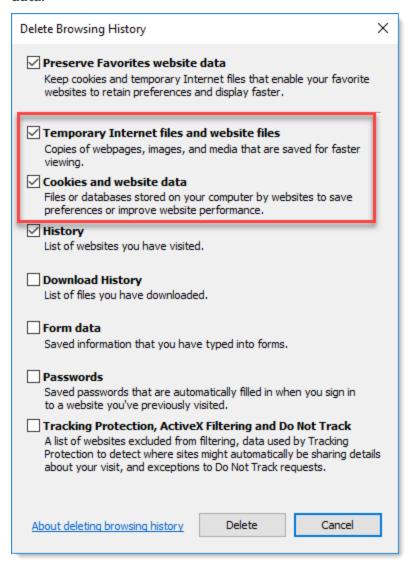
# Clearing the browser cache in Internet Explorer

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.
- 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.