Practical Process Automation for Staff: Scheduled Tasks

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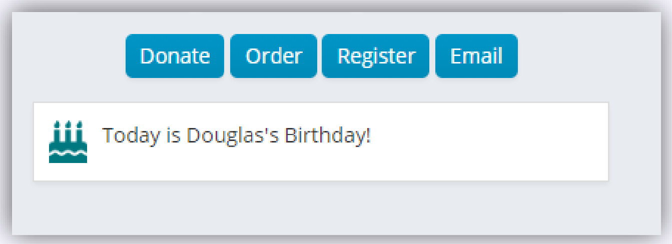
What is Process Automation?

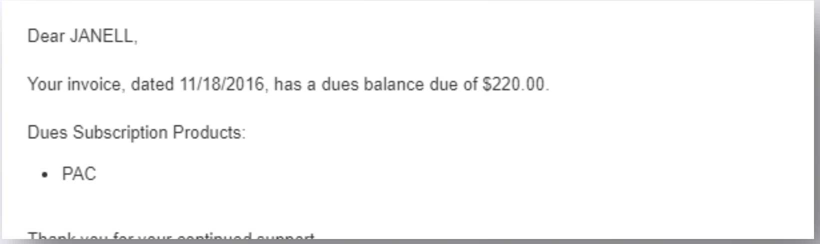
Alerts

- Placed on Content Pages
- Examples:
    - Owe dues
    - Missing phone number
    - New donor club achieved



Scheduled Task

- Perform a routine action
- Examples:
    - Email new member
    - Send a report to staff
    - Update database value based on a member activity


Dear JANELL,

Your invoice, dated 11/18/2016, has a dues balance due of $220.00.

Dues Subscription Products:

- PAC

NOTE: Process Automation PLUS module must be purchased to create new tasks!

What do I need to know to get started?

When?

- Scheduled vs. Database Change
- Frequency: one time, daily, weekly, monthly (hourly can be made using daily)
- Time of day (consider time to run and app pool recycles)

Who?

- To, CC, BCC recipients if emailing or sending a report
- Who data should be updated for if stored procedure
- Keep in mind task frequency!

What?

- Email: consider format, images, additional lists of data to appear within the email
- SSRS report to be sent
- Stored Procedure to be ran

NOTE: A process automation task can do more than one thing – it can have more than one trigger, action, data source.

Sample Process Automation Task Template

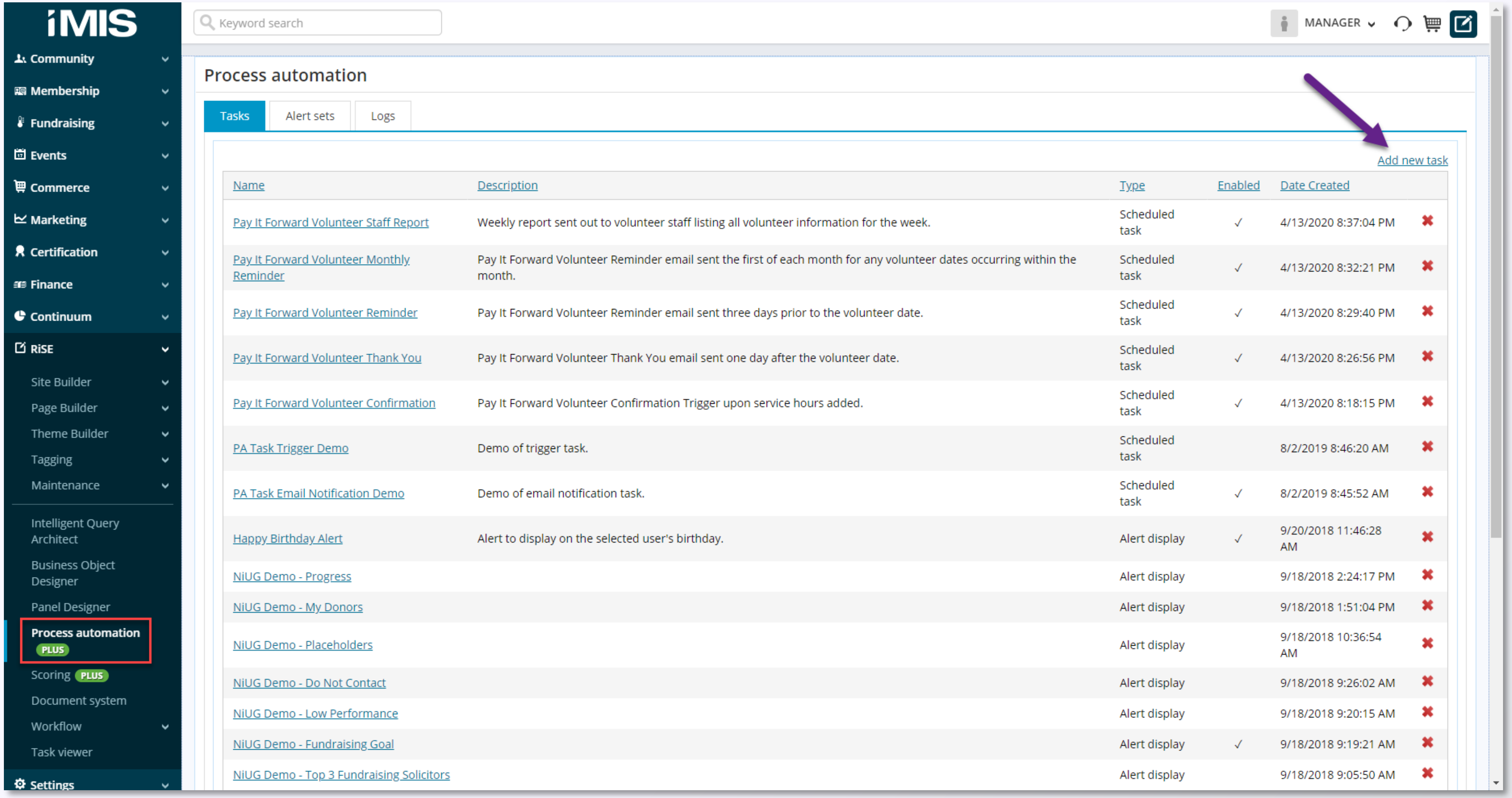
Process Automation Task TEMPLATE

Status	Name of Alert	Schedule	Qualifier(s)	Who should be emailed	Email Table *(if email requires table with activity details, what*	Letter Body	Email From	Email To	Email CC	Email BCC	Email Subject Line
Example	*New AFP*	*Nightly, 1 AM*	*lember type='UG'Transaction*	*nberCPVPFAACCHAACFA*	*er NameEffective DateCurrent Balanc*	*See Email Step tab*	*email@example.org*	*nberCPVPI*	*ACCHAACFA*	*rtment@examp*	*Notification of Member AFP Status*

Process Automation Task TEMPLATE

Email Body	Special Notes
Attention Member: *The Fraternity's records indicate that you were placed on AFP yesterday.* *{Table}* *For additional clarification on the AFP process, please visit: www.example.org/fees. Any questions regarding this information should be sent to memberdepartment@example.org.* *Thank you,* *Member Department* *cc: AAC Financial Advisor* *AAC Chairman*	*Please add hyperlinks to:* *www.example.org/fees* *memberdepartment@example.org*

Where do PA Tasks live in iMIS?



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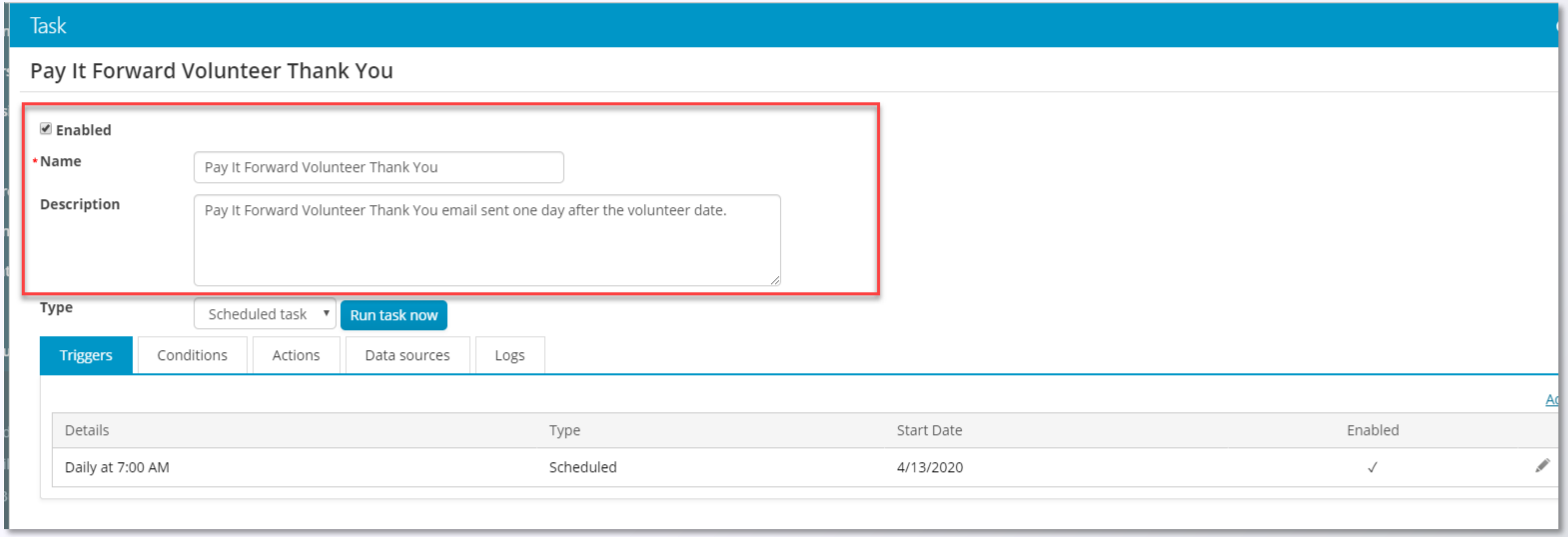
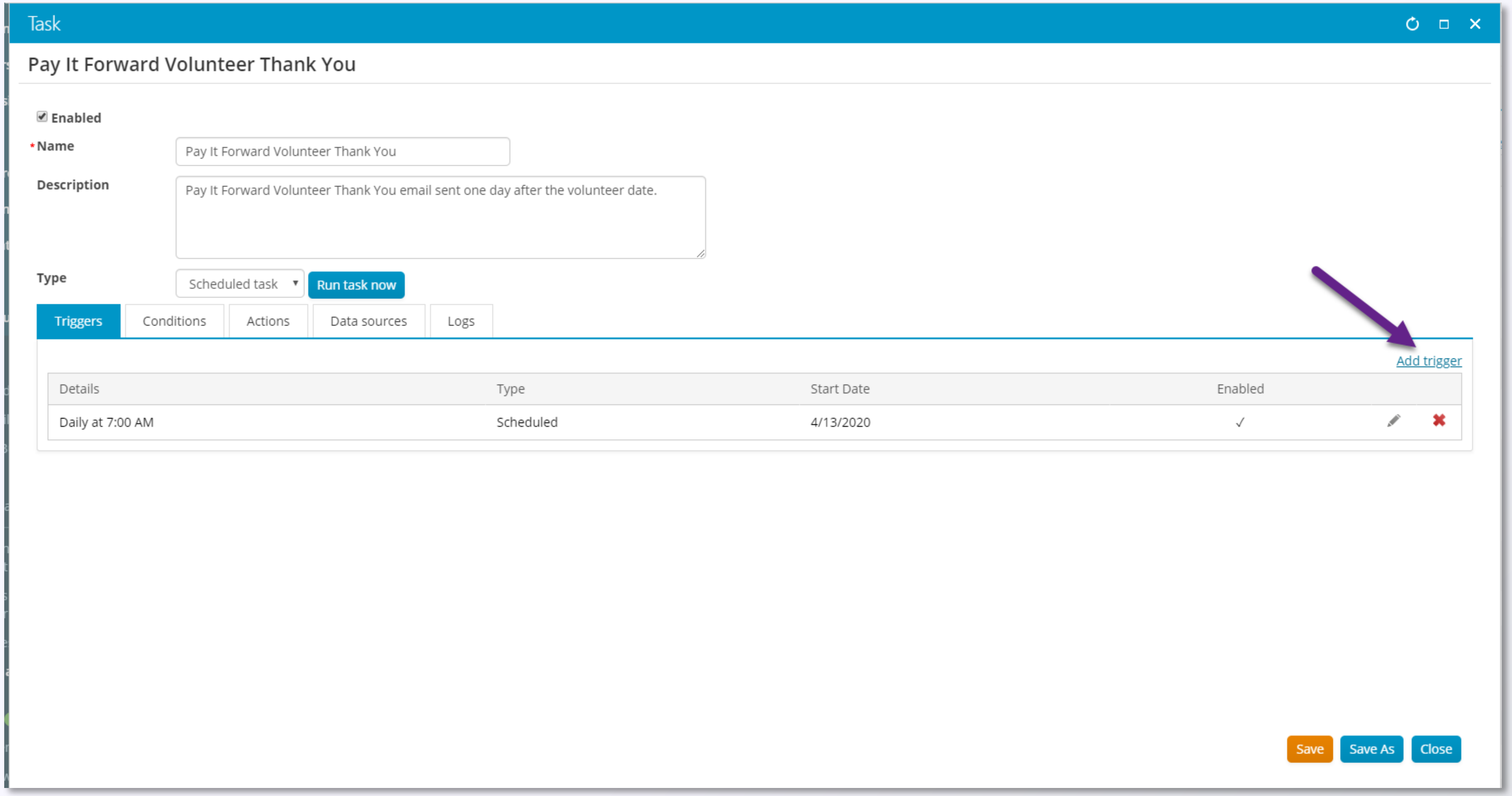
Give Your Task a Name

- **Fill in a name and description for your task so that others will know what your task does**
- **Make sure to enable your task once you have done your tests and are ready for it to run**

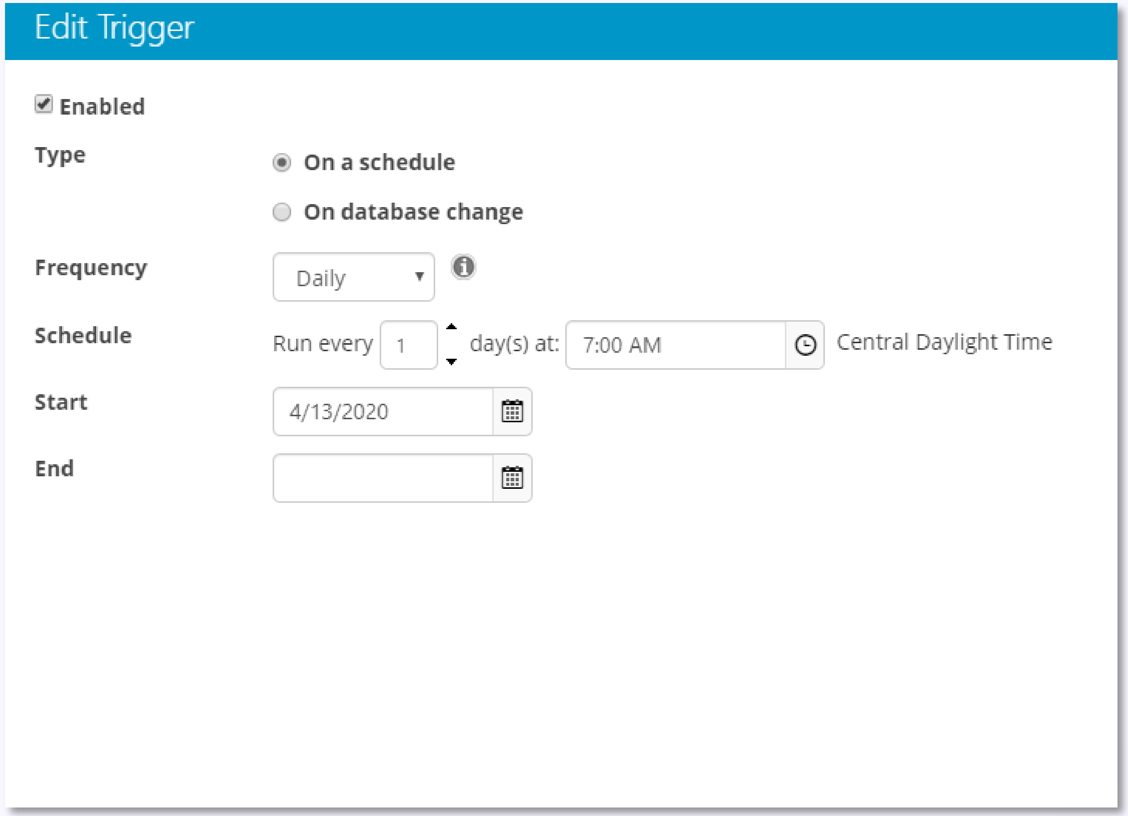


When? – Triggers Tab

- **Add trigger to fill in when and how often the task should run**

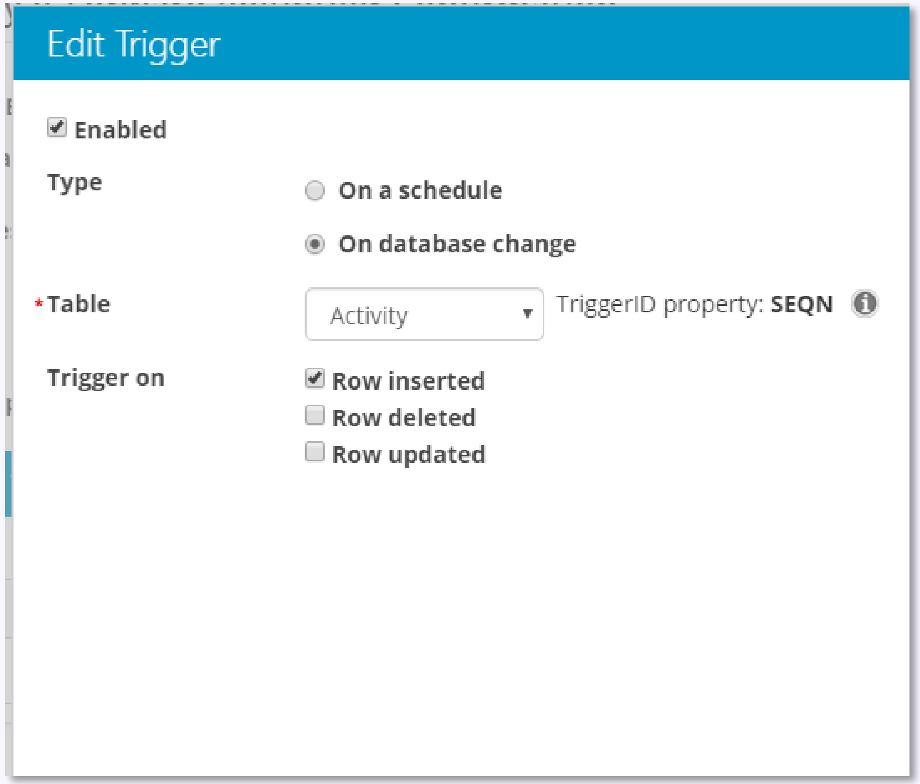


When? – On a schedule



- Fill in frequency, schedule days & times, and date the task should start
- End date can be left blank if indefinite
- Hourly tasks can be done by adding multiple daily triggers, one for each hour of the day
- Keep in mind time zone
- Make sure to enable your trigger once you have competed your testing and are ready for the task to run

When? – On a database change

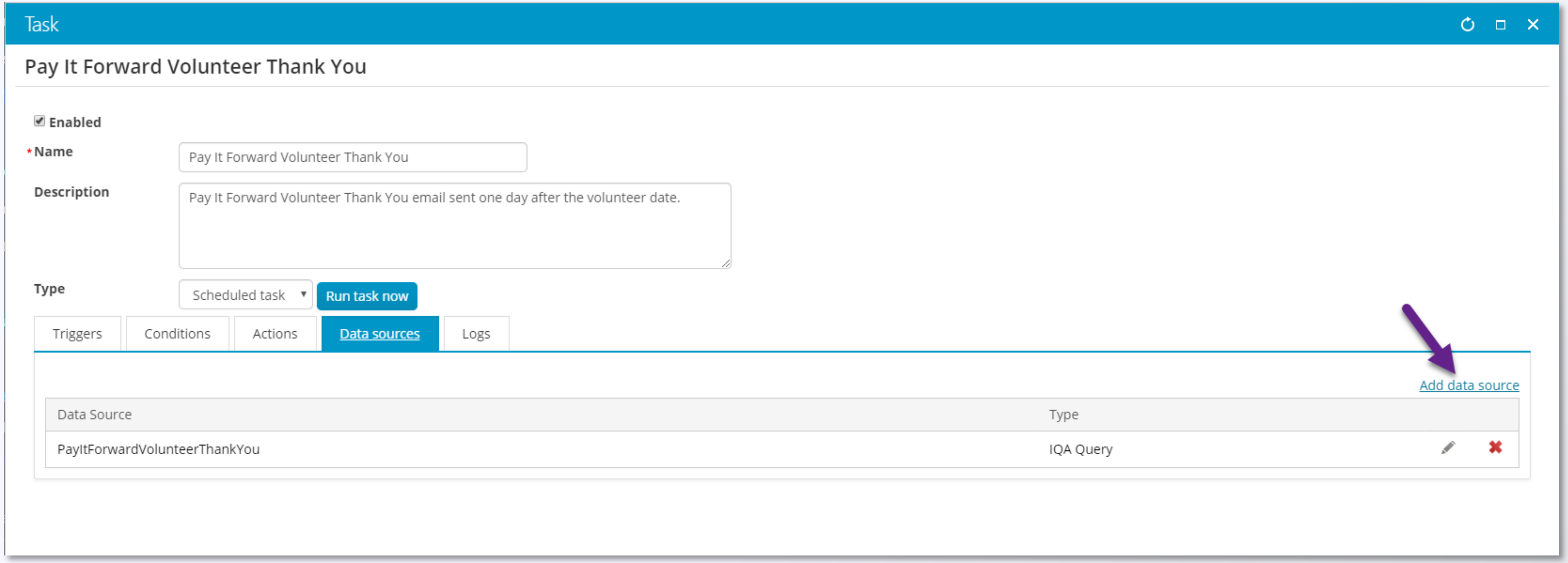


WARNING: Triggers on a database change can impact performance!

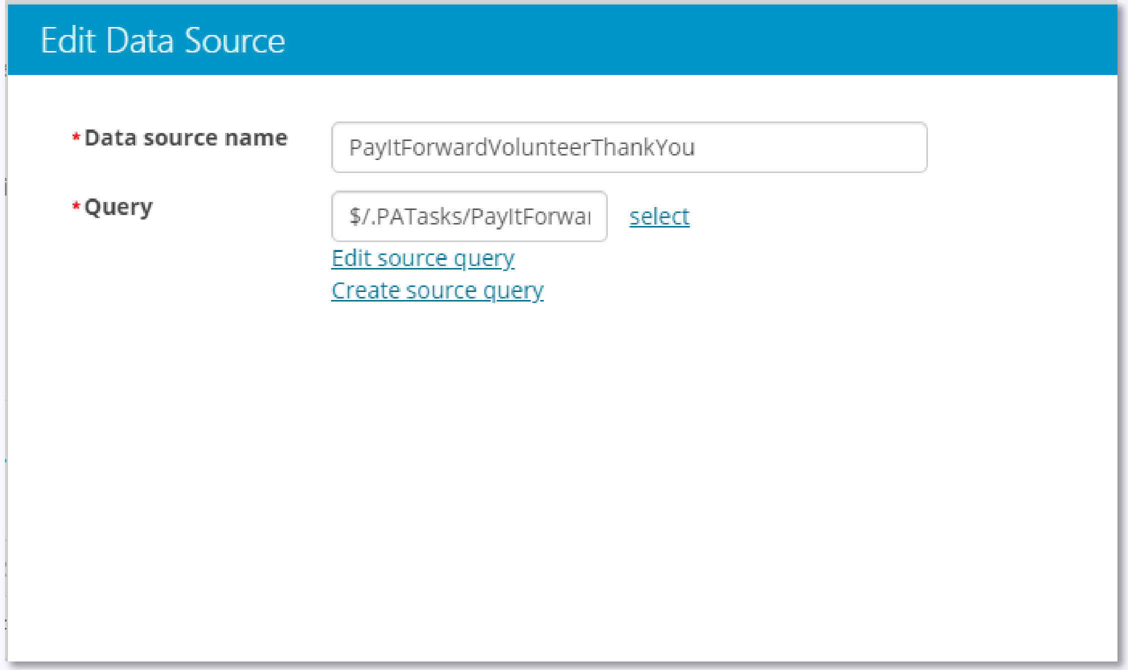
- Select the table to watch for a value change
- Indicate if the trigger should happen upon insert of a new row into the table, update of a specific column in the table, or deletion of a row in the table
- Make sure to enable your trigger once you have competed your testing and are ready for the task to run

Who? – Data sources Tab

- **Add data source to determine who the action should be performed on**



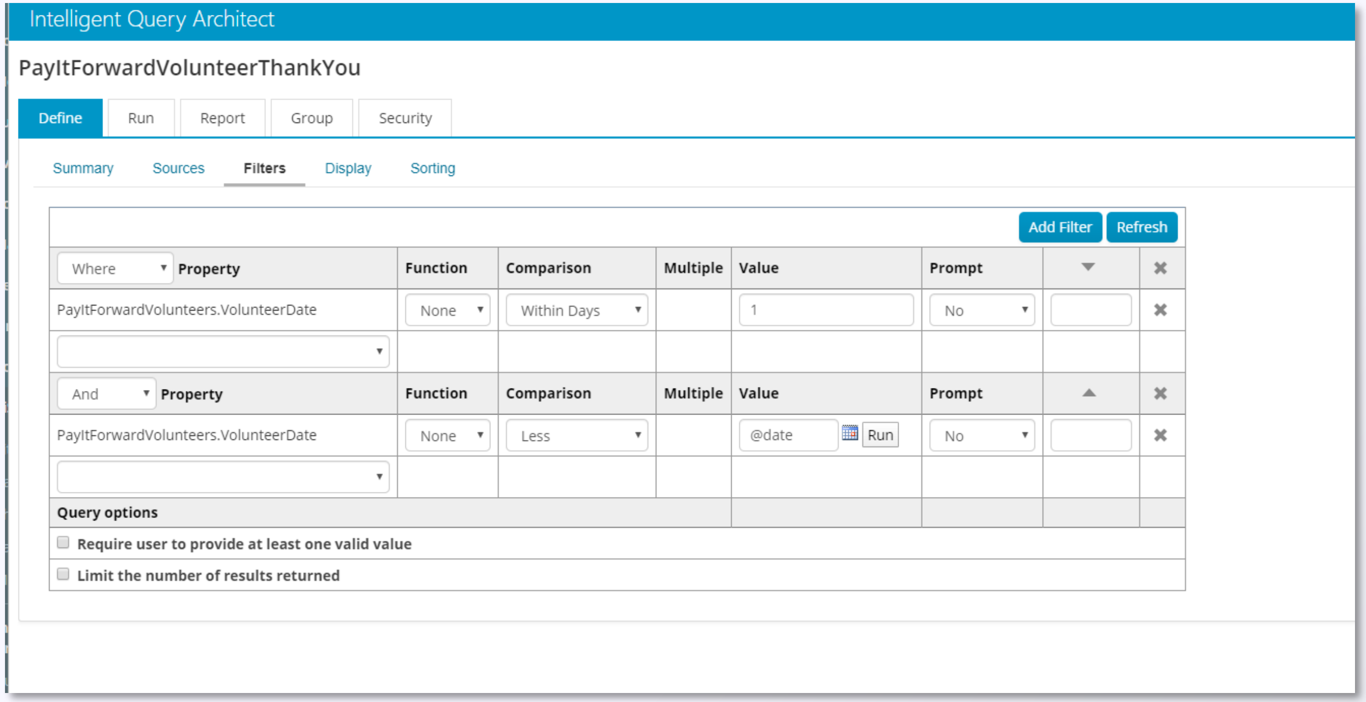
Who? – Select Your IQA



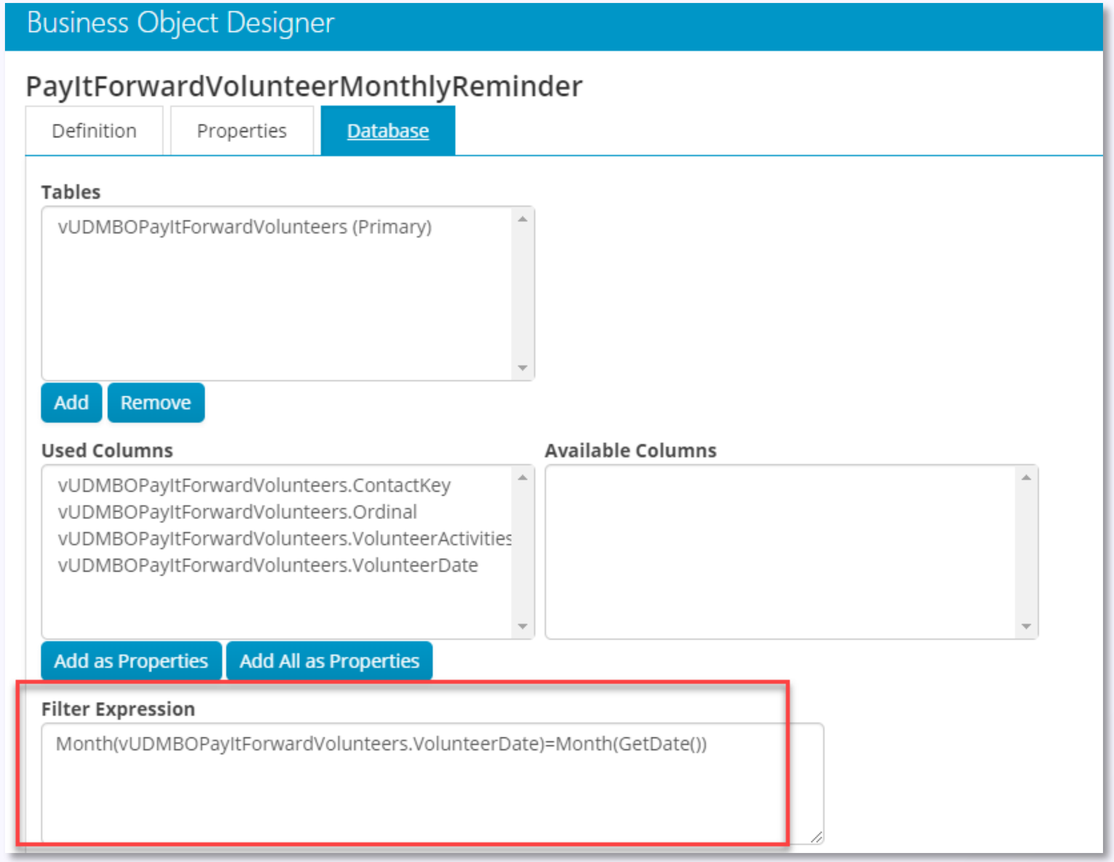
- Select Your IQA
- Give your data source a name
- Data source names should NOT contain spaces

Process Automation IQA Tips

- **Make sure your filter takes into consideration the task frequency or recipients will receive emails more than you might like!**
- **Use a date with within days = 1 AND less than today's date to filter by "Yesterday". The "AND" filter is important!**



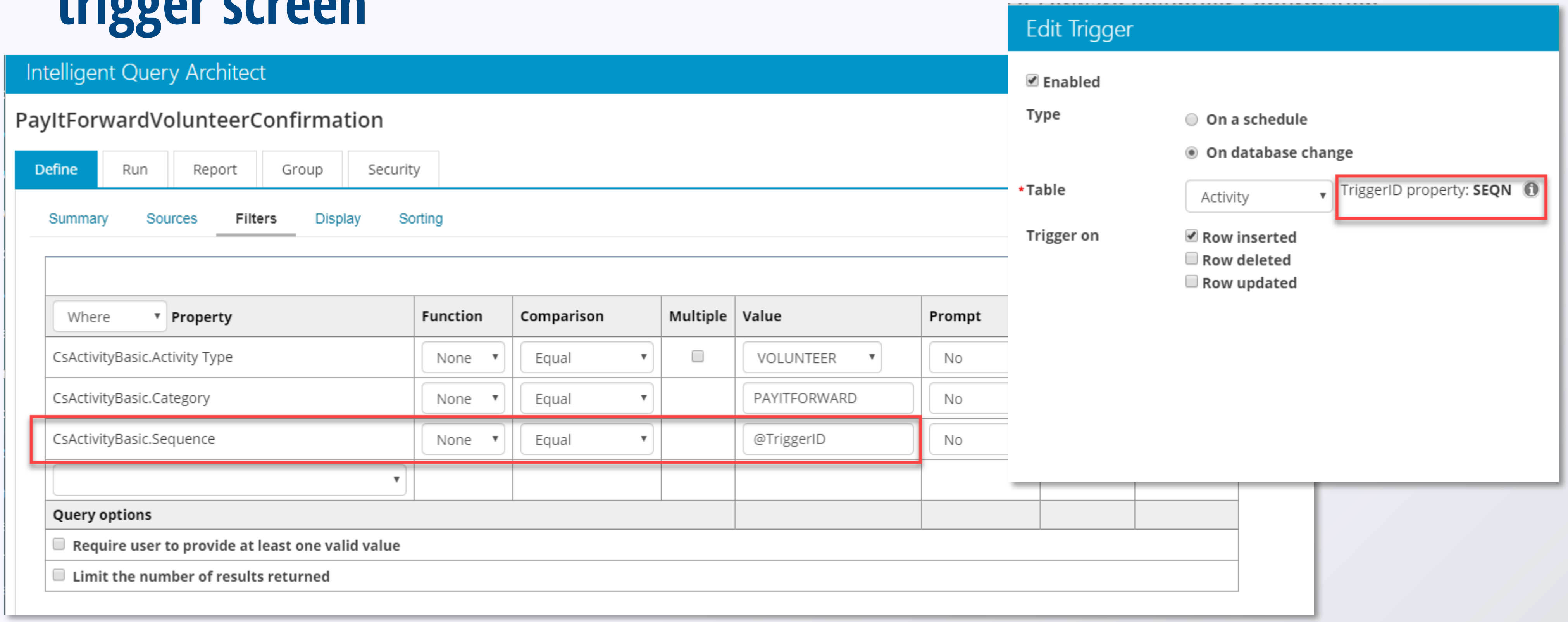
Process Automation IQA Tips - continued



- **You cannot use SQL functions in the filter area of IQA's so create a Business Object and use the Filter Expression there instead!**

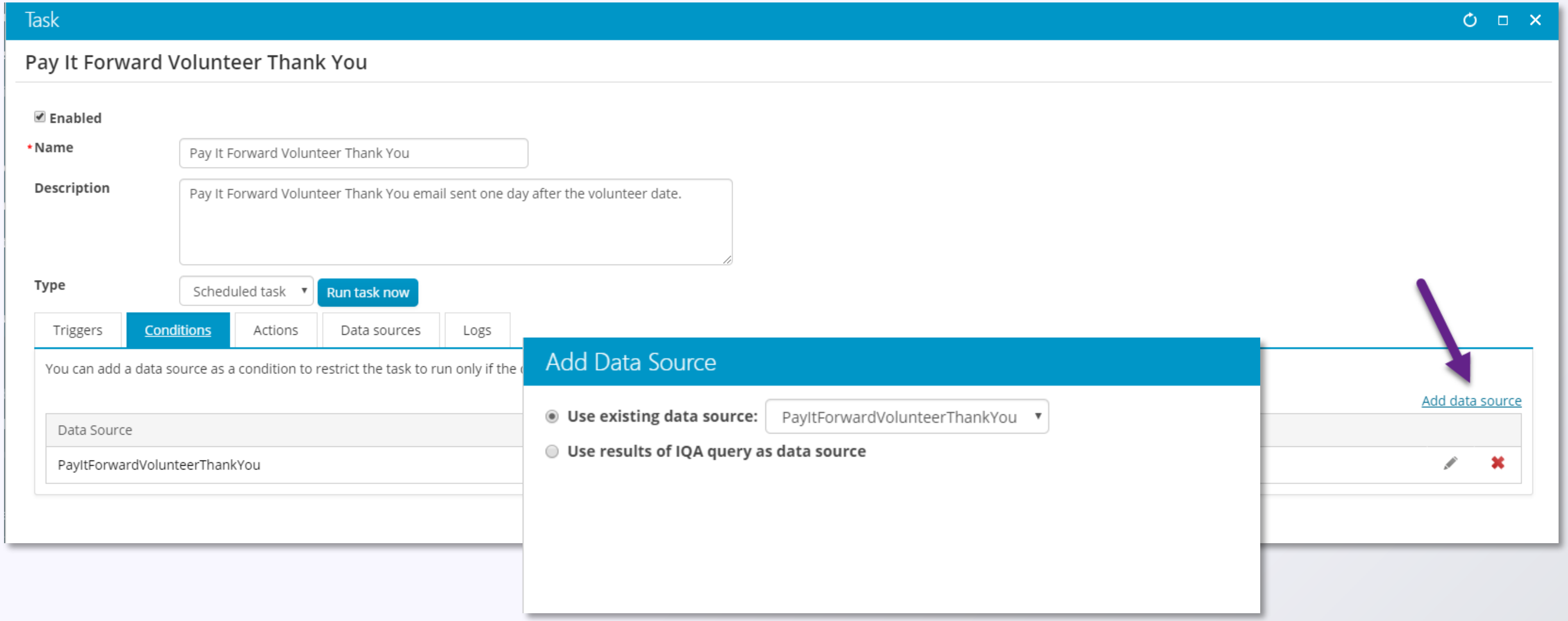
Process Automation IQA Tips - continued

- **If your trigger is on a database change, be sure to include a filter in your IQA filtering by @TriggerID**
- **The column to filter by must match the column noted in the task trigger screen**



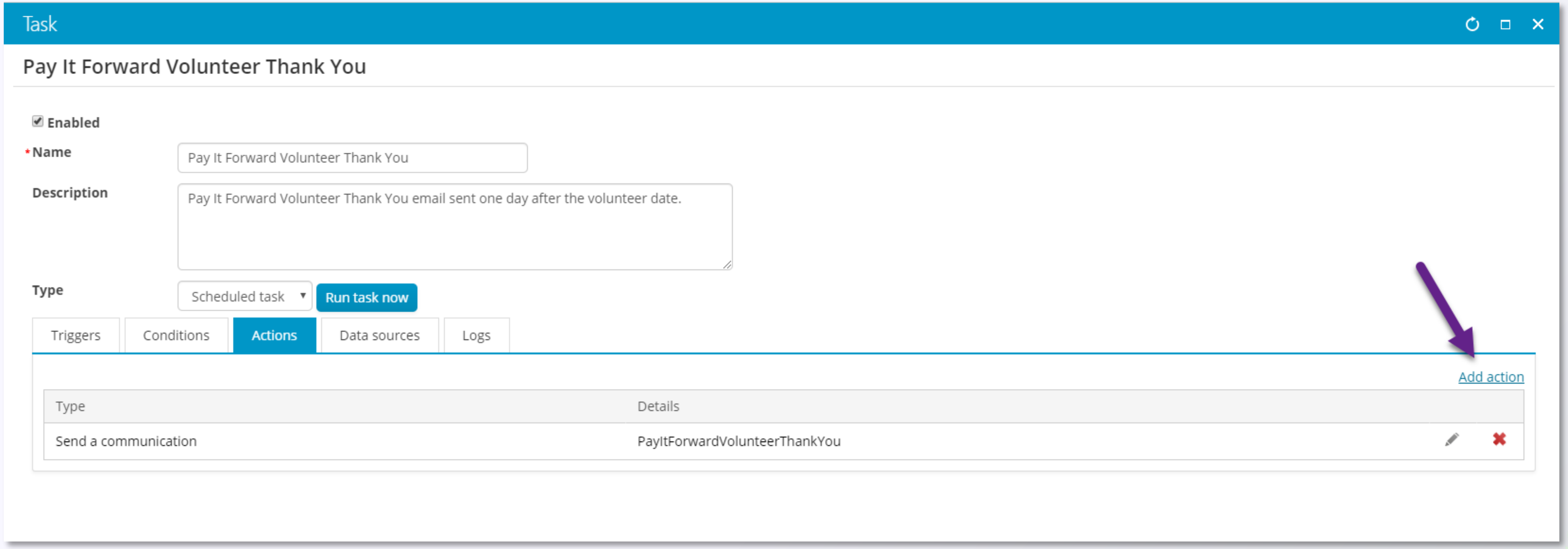
When? – Conditions Tab

- **Add conditional data source if you don't want the actions to run if your conditional data source returns no results**
- **Conditional data sources are optional**



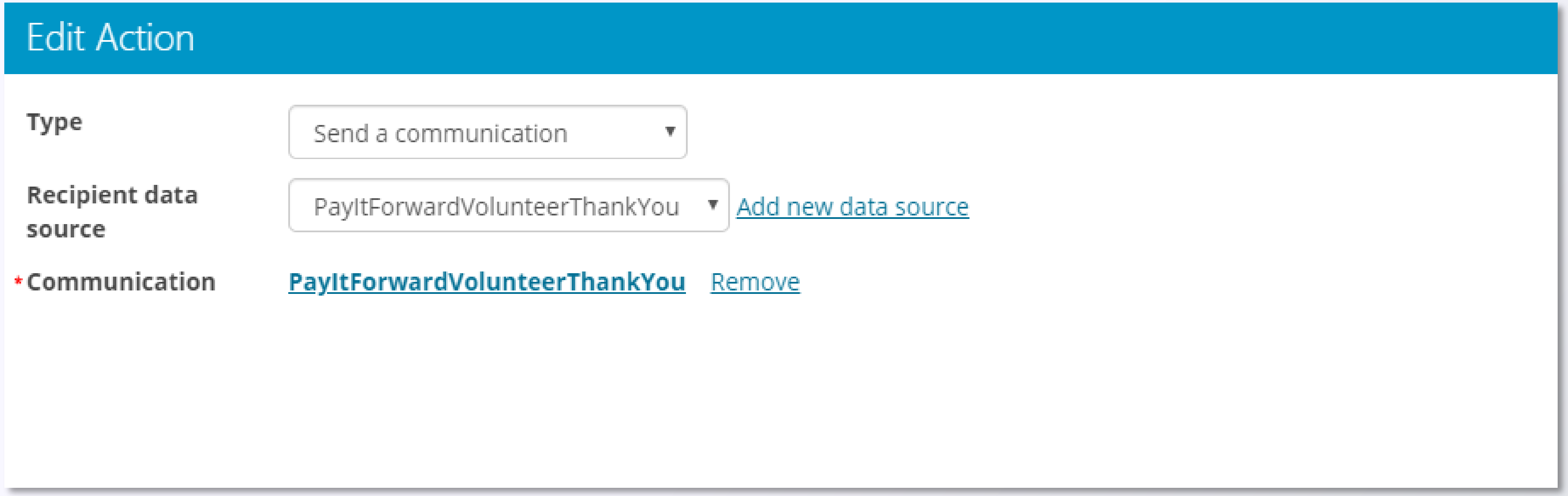
What? – Actions Tab

- **Add the action you want the task to perform**



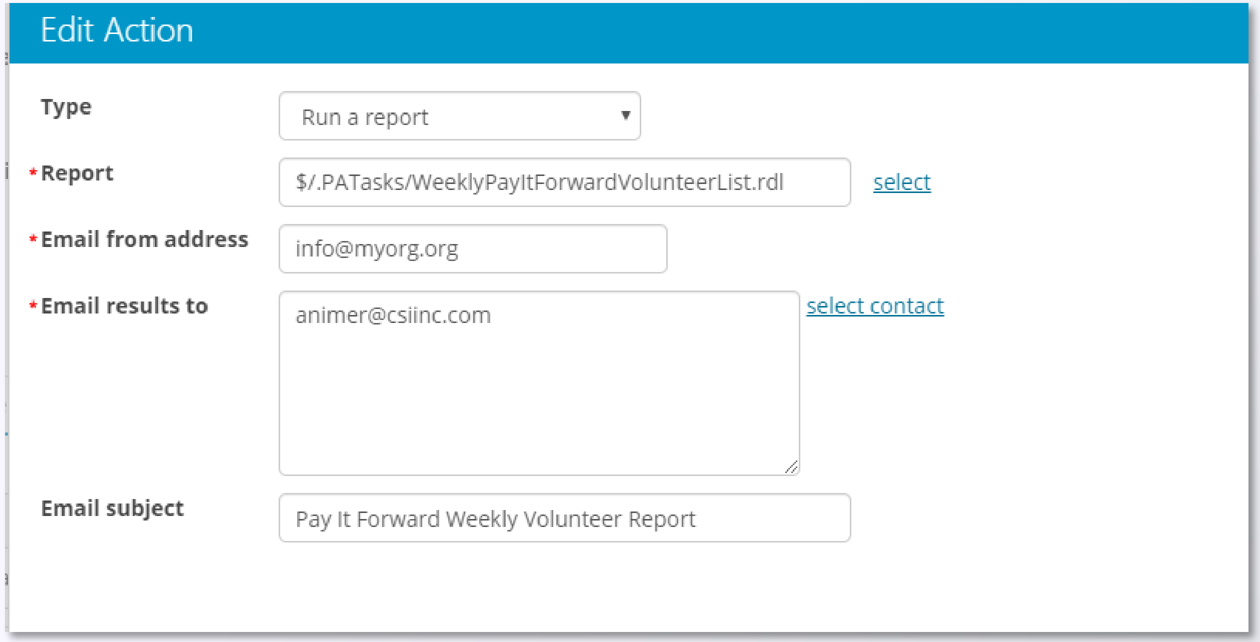
What? – Send a communication

- Select the task data source the email should use
- The data source selected here overrides the recipient data source selected in the communication template itself
- Select the communication template to use



What? – Run a report

- **Select the SSRS .RDL report to send**
- **Enter from, to, and subject information for the report email to be sent'**
- **If you want to be able to specify a body message or have a custom report per recipient, then use send communication instead with report attachment**



NOTE: Run a report actions do not require a data source to be added to the task.

What? – Run a stored procedure

- **Enter Stored Procedure to be ran**
- **Enable parameters if parameters are to be sent to the stored procedure**

Edit Action

Type Run a stored procedure

* **Stored procedure name** csi_sp_InsertPayItForwardServiceHe

☑ **Enable TriggerIDs as parameters** TriggerID parameter: **SEQN**
Data type: **int**

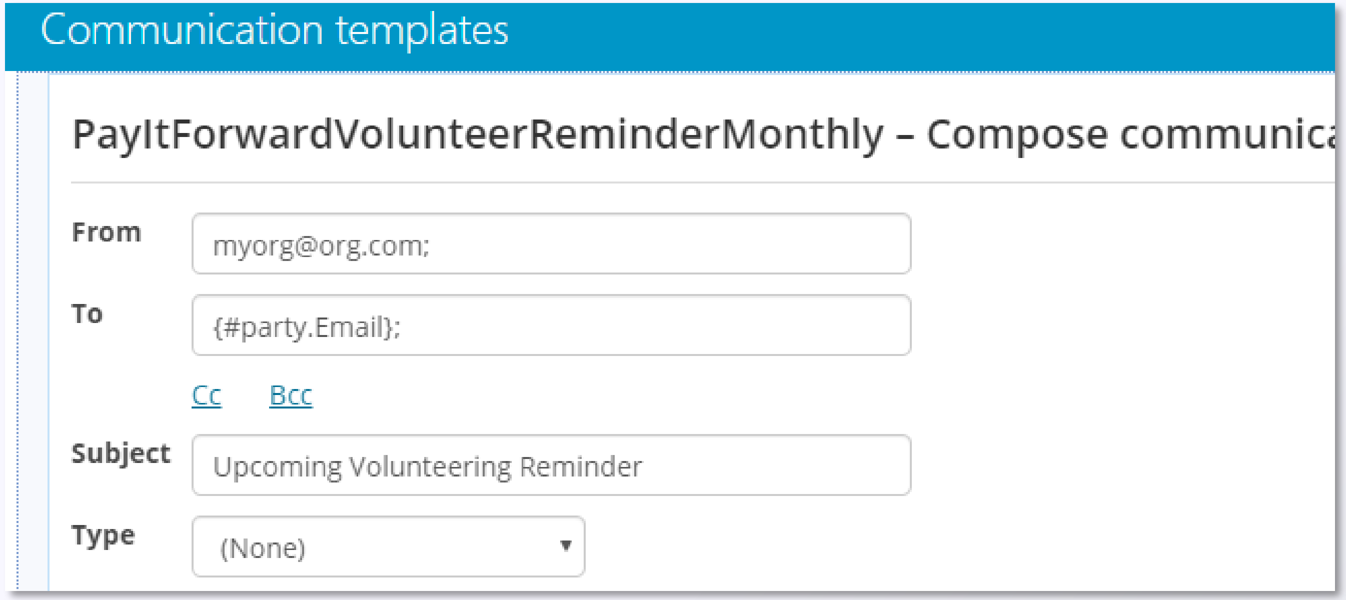
```sql
DECLARE @LAST_SEQN_VALUE int;
DECLARE @CURRENT_DATE date=getdate();

--Insert Into Activity (SEQN, ID, ACTIVITY_TYPE, TRANSACTION_DATE, EFFECTIVE_DATE, NOTE)
SELECT
    SEQN = row_number() over (order by a.ID),
    ID = a.ID,
    ACTIVITY_TYPE = 'SERV_HERO',
    TRANSACTION_DATE = convert(date,@CURRENT_DATE),
    EFFECTIVE_DATE = convert(date,@CURRENT_DATE),
    NOTE = 'script'
-- Step #1: create a temp table
INTO #Activity
FROM Activity a
WHERE a.SEQN = @TriggerID
    AND (SELECT SUM(a3.UNITS) as TOTAL_HOURS
        FROM Activity a3
        WHERE a3.ID = a.ID
          AND a3.ACTIVITY_TYPE = 'VOLUNTEER'
          AND a3.CATEGORY = 'PAYITFORWARD') > 30
    AND NOT EXISTS (SELECT 1 FROM Activity a2 WHERE ACTIVITY_TYPE = 'SERV_HERO' AND a2.ID=a.ID)


-- Step #2: update the Counter table
-- i.e. grab the current LAST_VALUE and at the same time increment it by the number of rows in
UPDATE Counter
SET LAST_VALUE = LAST_VALUE + (select count(*) from #Activity),     -- that's the increment/upd
    @LAST_SEQN_VALUE = LAST_VALUE,                                  -- that's the current last
    LAST_UPDATED = getdate(),
```

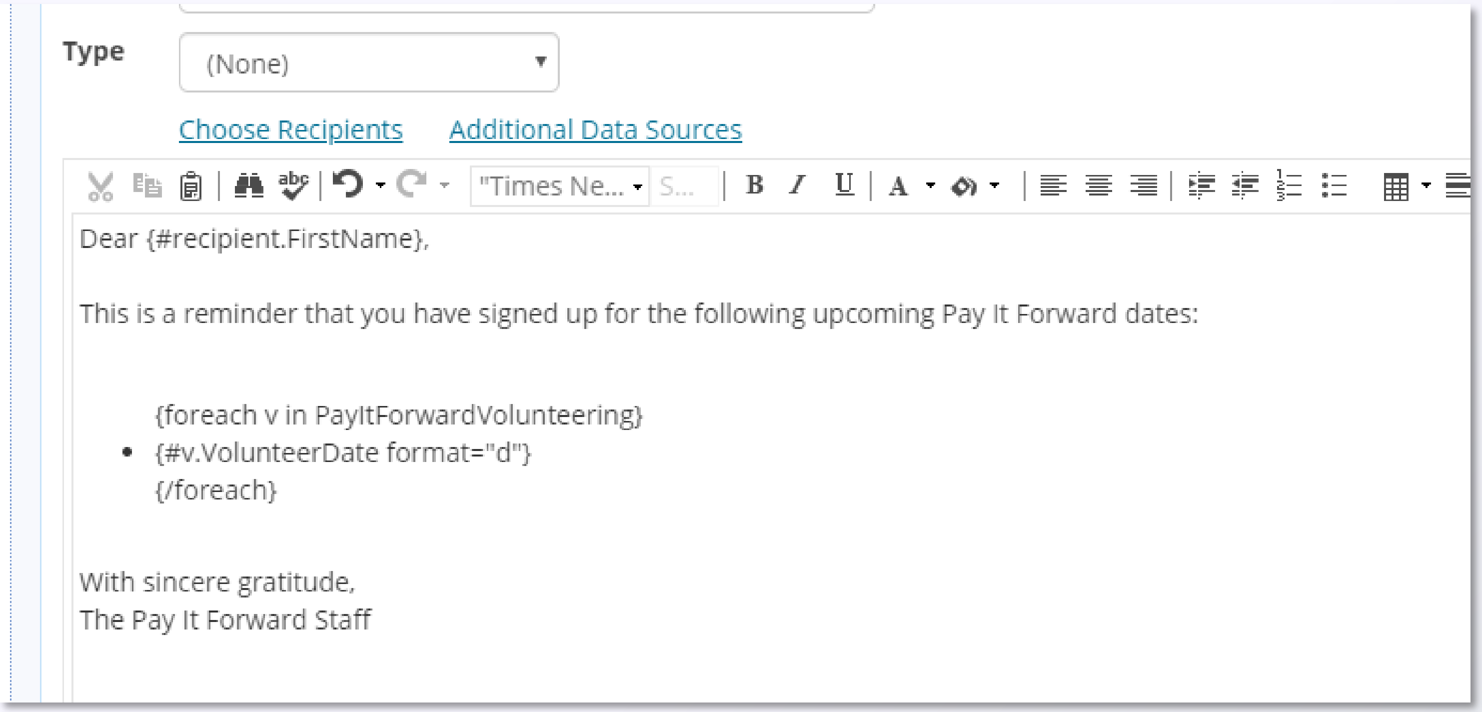
Communication Template Tips

- It is recommended to only have the TO go to one recipient at a time (not a list) as iMIS records the interaction based on the iMIS ID (CC and BCC interaction records do not get written)
- CC and BCC have some known bugs when using data placeholders instead of static values (you can repeat rows in your recipient data source for CC/BCC to get around this issue)
- The party additional data source automatically gets created with communication templates and ties to your recipient data source via the iMIS ID and pulls recipient Name table data
- Your recipient data source MUST contain an iMIS ID



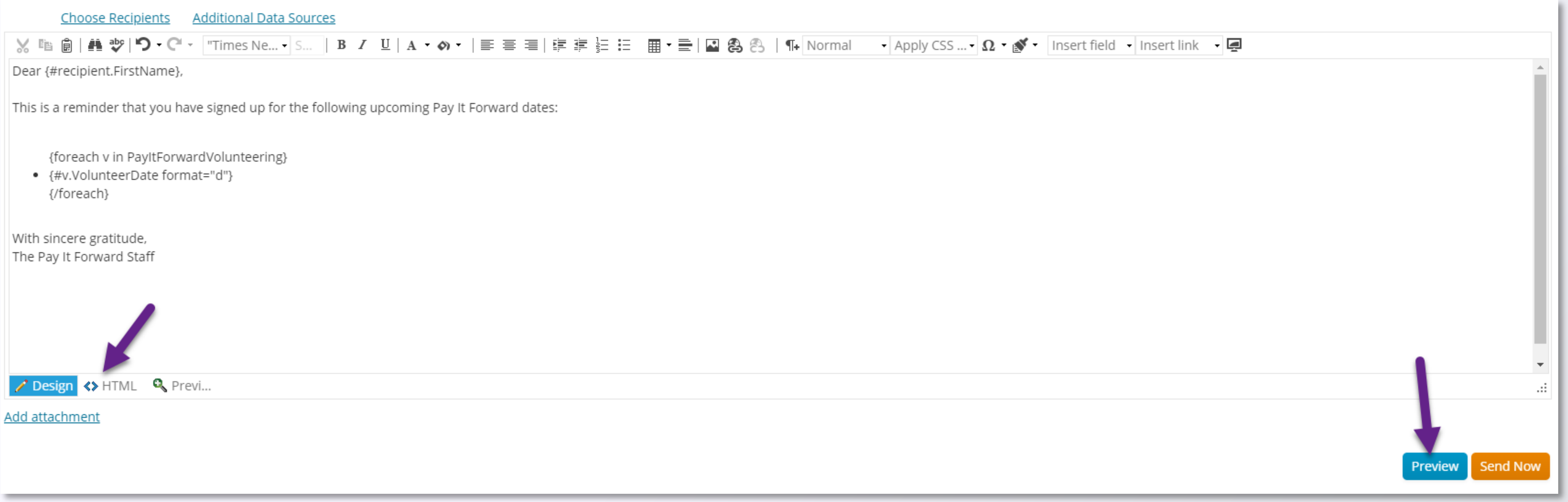
Communication Template Tips - continued

- Data Placeholders can use format attributes to help format things like dates and currency (see resources at end of slides for options) – ie {#recipient.VolunteerDate format="d"}
- {foreach} loops can be used to display repeating data from your Additional data sources
- It is recommended to use lists or line breaks only inside of the {foreach} as there are some bugs with using a table inside of the {foreach}



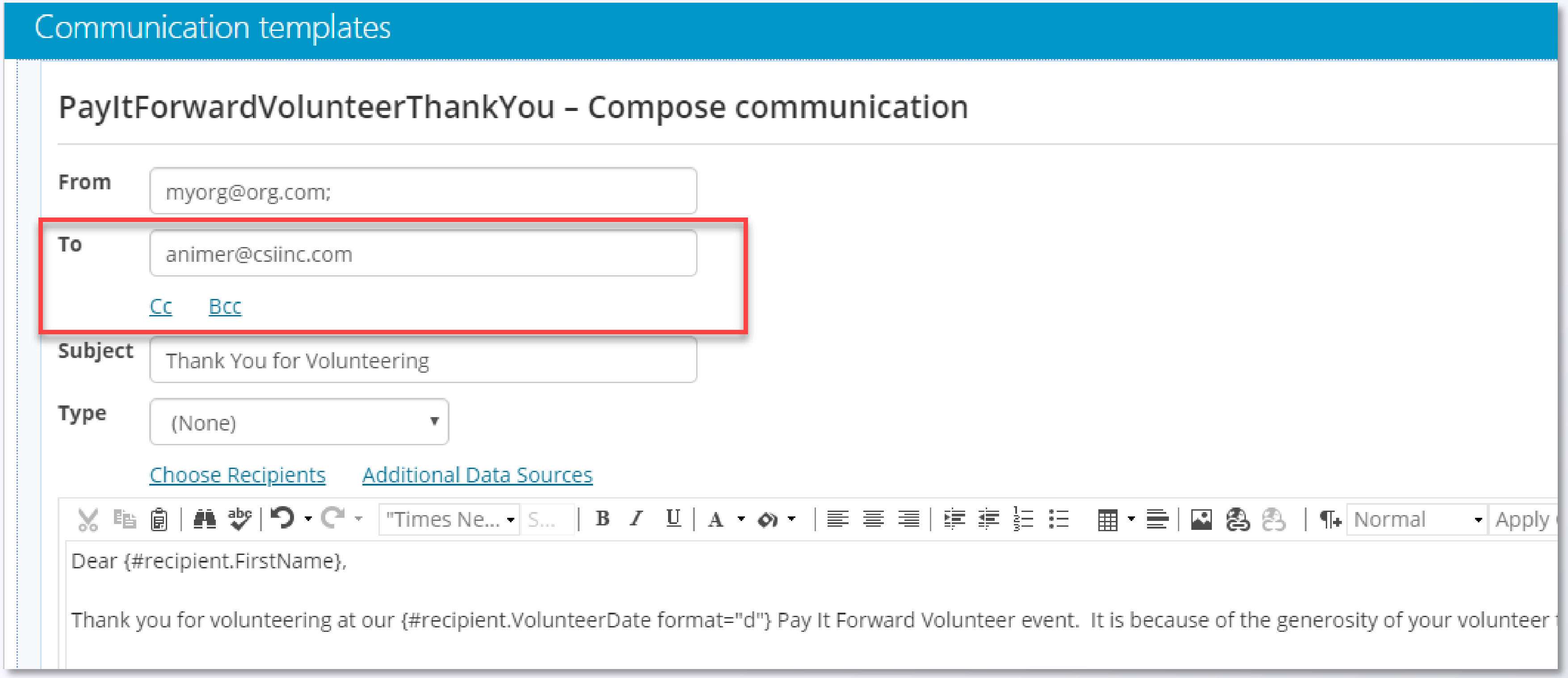
Communication Template Tips - continued

- If using images in your email with width and height attributes, Outlook tends to ignore those attributes so try to make the image itself the size you wish it to appear
- Use the preview button to review your emails to make sure recipients and data placeholders fill in as expected.
- If extra spaces appear or things are not formatting as you desire, you can look at the HMTL view to make sure HTML tag appear correctly with correct beginning and ending tags where you want them



Testing Your Email Tasks

- **If sending emails, have the task go to your email address for testing and so you can verify the email is formatted the way you would like**



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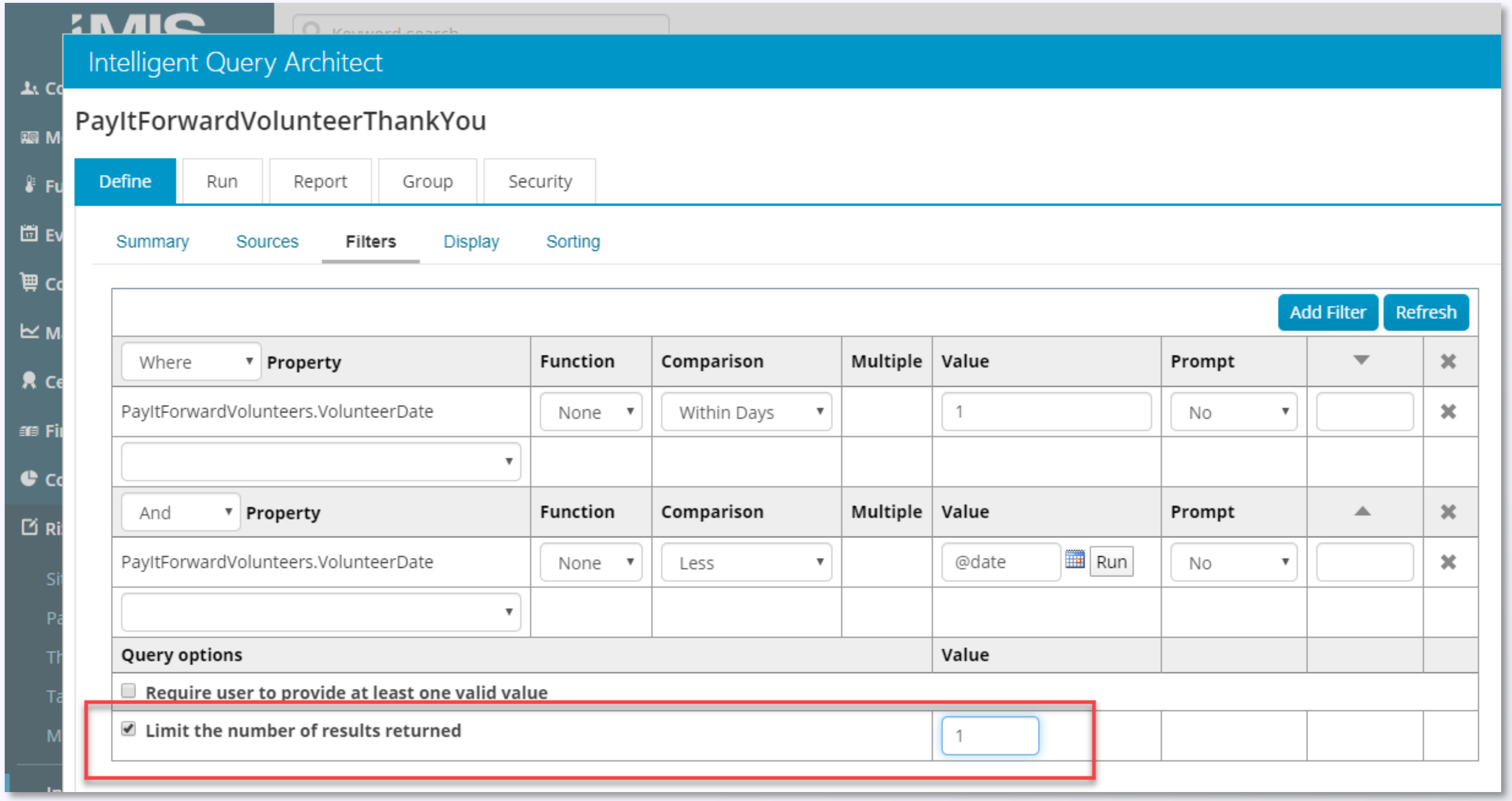
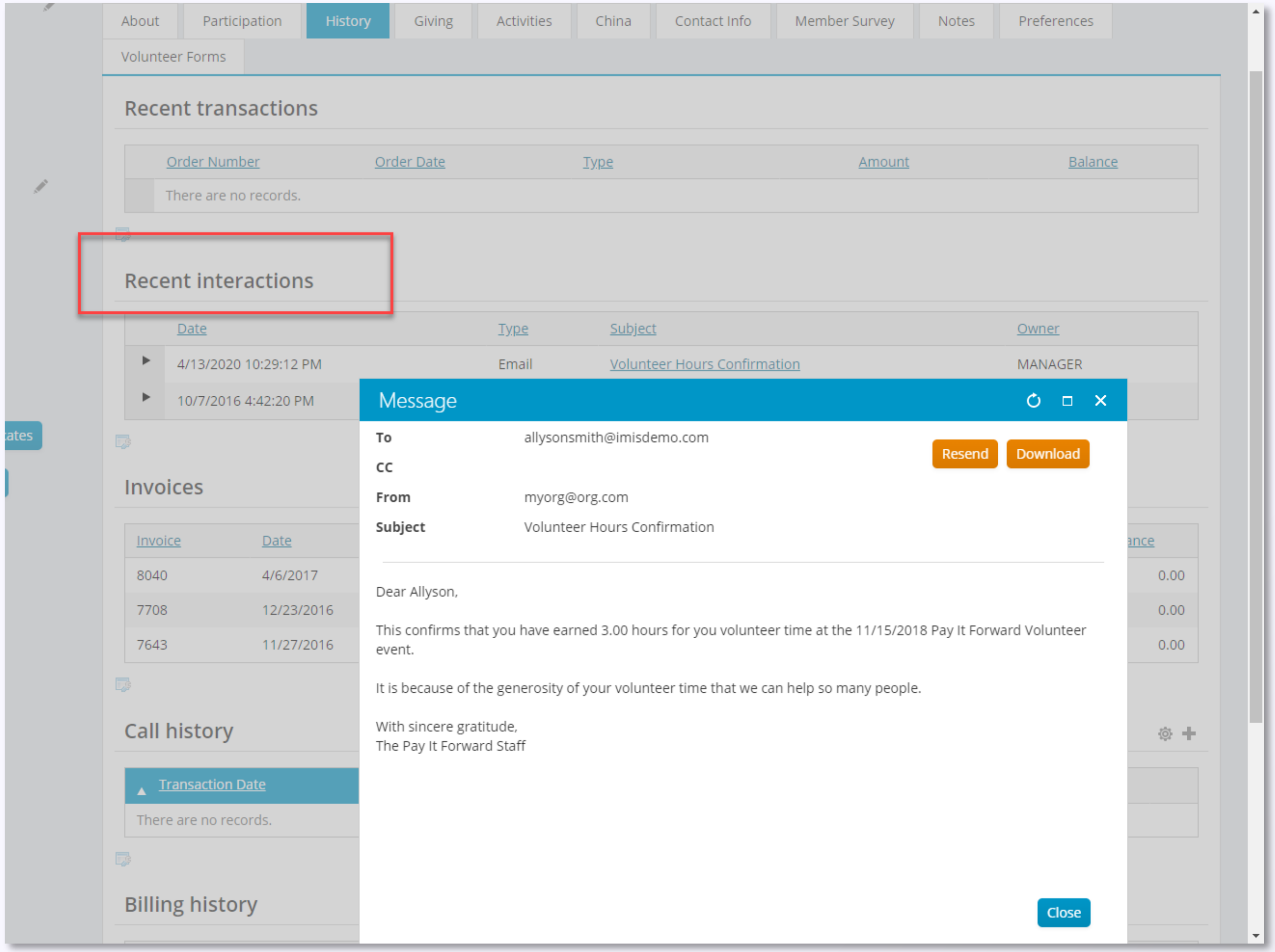
Testing Your Email Tasks - continued

- **To avoid filling up your inbox with lots of email when testing, set your IQA filter to limit the number of results returned**



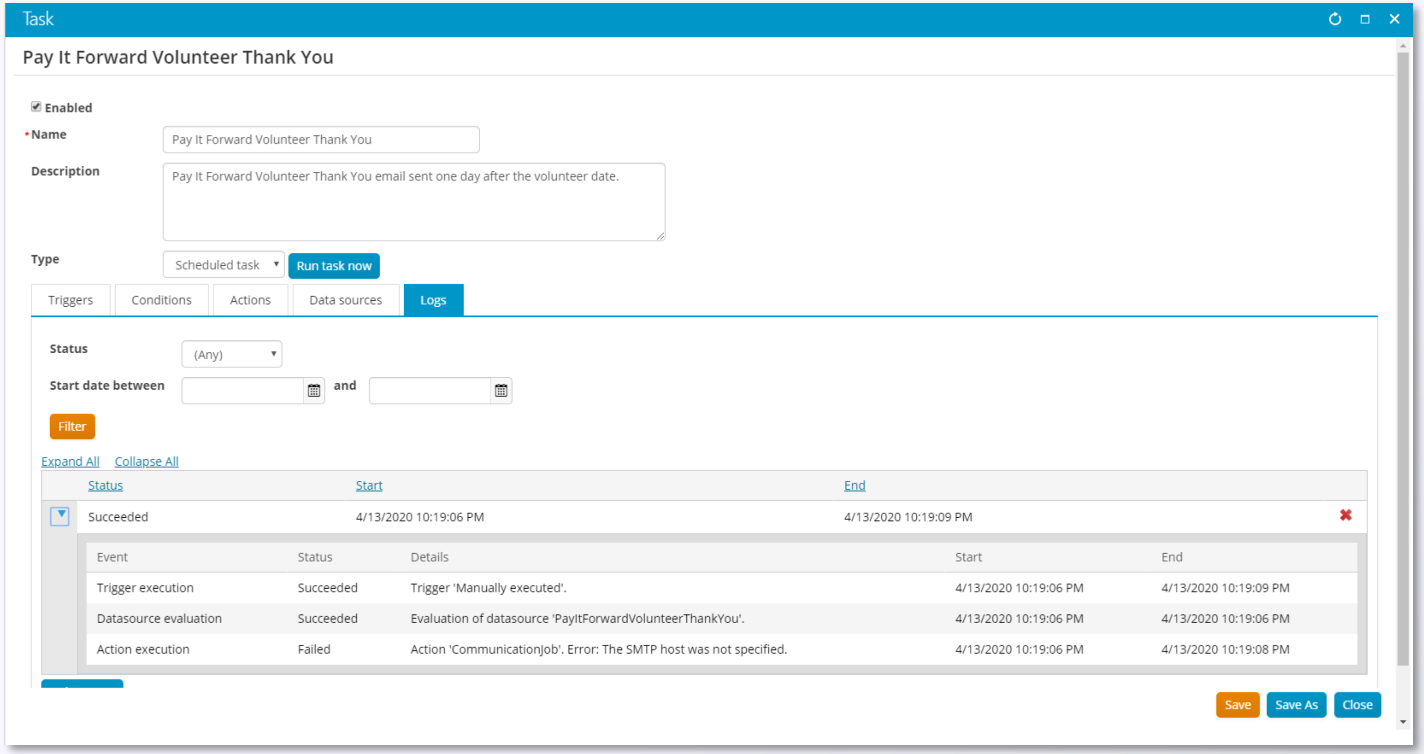
Testing Your Email Tasks - continued



- You can go to the member profile history tab and view Recent Interactions to verify email sent and recorded for the recipient
- You can also Resend and Download the email as well

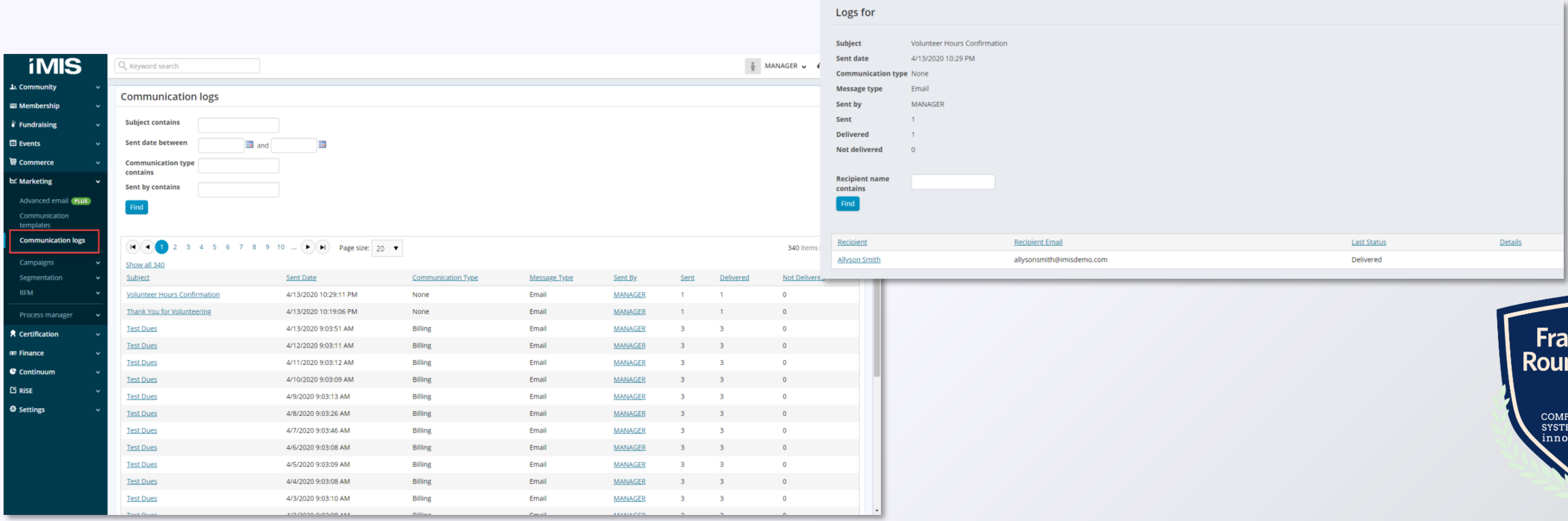
Logs – Making sure things are running!

- **Make sure both the Trigger "Enabled" checkbox and the task "Enabled" checkbox are checked**
- **Check the task Logs Tab to verify things are running properly**



Logs – Making sure things are running! - continued

- For email tasks, check the communication logs to verify emails are being sent and delivered
- Click on the email subject to see the list of recipients and email addresses sent to along with specific delivery issue details



Resources

- **iMIS Process Automation Documentation:** https://help.imis.com/iMIS2017/Features/RiSE/Process_Automation/Process_automation.htm
- **iMIS Communication Template Documentation:** https://help.imis.com/iMIS2017/Features/Marketing/Communications/Working_with_communication_templates.htm?Highlight=communication%20templates
- **Communication Template Placeholder Format Options:** https://docs.microsoft.com/en-us/dotnet/standard/base-types/formatting-types
- **SQL Server Built-in Functions:** https://www.w3schools.com/sql/sql_ref_sqlserver.asp

Next Up...

Starting at 3:00pm

ICE Essentials & Latest Updates

- Stay right where you are!

Fundraising Essentials in RiSE

- Will need to Switch Zoom Links

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