

# GET STARTED GUIDE



2014

The Admin Guide For Your CRM System

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## GovQA



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**Welcome** to GovQA. We hope our guide answers all your questions and serves as a valuable resource as you get started with your CRM system.

This document contains the basic information necessary for admin users to effectively set up the configuration of the system. Please remember, every system is custom and built to the clients' specifications. This guide will serve as a basic reference but might not look exactly like your system. If at any time you are uncertain of the information, please feel free to contact our Customer Support Team by visiting <u>www.supportqa.com</u>.

Training videos are also available on your site. You can access them by Clicking "Help" and selecting "Online Training Videos."

Thanks again and we look forward to working with you.



## **Getting Started**

## Logging in to the System

Use the link provided to you to access the Administrator Portal.

The login screen will be presented to you. We recommend adding the site your favorites for quick access in the future. Enter the Login ID and password and Select "Login". Your login is typically your first initial followed by your last name, for both the login ID and password.

nline FOIA	
😚 Login ID:	Please enter your Login and Password below
Password:	Login
	V. 7.110 Bld. 300 © 2001-08





## Accessing the Setup

#### **General Layout of the Setup Page**

1. To access the setup page, click on the <u>Go To</u> button (first button on the top right corner of your screen).

From this page you will be able to manage your system (e.g. edit email templates and custom fields, add holidays and additional staff, etc.).

#### 🌼 Setup

#### 🙎 Customers

- Configuration Options
- Custom Fields
- Letter Templates

#### 🖂 Email

- Configuration
- Email Templates
- Mailbox Workflow
- POP Mailboxes
- Staff Email Lists

#### 🌼 General

- Company Holidays
- Company Work Schedule

## Activities Answer Details Custom Fields

- Filters
- Priority List
- Ouestion Admin Options
- Question Admin Op
- Question Details
- Setup Workflow Rules

闷 Questions and Answers

Status ListVisibility List

#### 📋 Requests

- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses
- Properties/Locations
- Request Activities
  Request Origin
- Request Public Summary Setup
- Request Public Summary Setup
- For Mobile

3/12/2014

- Request Types
- Statuses
- Workflow



🔒 Security

Staff

Departments

Security Options

Security Profiles



## **Customer Fields/Customer Configuration**

You will be able to manage what kind of information you are collecting from your customers (first name, last name, address, etc.) when they are filling out an account on the portal or when you need to gather information from them in person.

#### **Customer Information**

- 1. From setup: Find the "Customers" section
- 2. Select: <u>"Configuration Options"</u>



- Configuration Options
- Custom Fields
- Letter Templates

When a customer first registers on the portal, at the very least they will need to provide an e-mail address and password. We can also collect additional information from them like their first name, last name, phone number, etc. These fields can be <u>required</u> (the system will not allow the customer to move forward until they have filled out those fields) or <u>optional</u> (it will be up to the customer if they want to include that information).

Under <u>"Customer Information,"</u> you will select which fields will be required, optional, or will not be displayed at all. You will have available <u>title</u>, <u>first name</u>, <u>middle name</u>, <u>last name</u>, <u>address</u>, <u>and phone</u>. Simply click on the dropdown and change it to optional, required, or do not show. After you\_have made the appropriate changes, <u>Click "Save"</u>.

Customer Information		
Title:	Optional	-
First Name:	Required	•
Middle Name:	Do not show	•
Last Name:	Required	•
Address:	Optional	•
Phone:	Optional	-

This is an example of how it would show for the customer on the portal as they are first registering.

*Email Address:	
*Password:	
*Confirm Password:	
Title:	
*First Name:	
*Last Name:	
Address 1:	
Address 2:	
City:	
State:	
Zip:	
Phone:	





## Defaults

If you would like to have the City, State/Province, and/or Zip/Postal Code fields automatically populate with a value, you would add them under the <u>"Defaults"</u> section. These values would automatically appear for the customer when they are registering on the portal or when a staff member is creating an account for them in the system – the customer/staff will have the ability to delete the value and add the appropriate one. After you have added/edited the values, <u>Click "Save."</u>

#### Staff Side of the System

#### **Customer Side of the System**

Defaults			
City:	Woodridge	City:	Woodridge
State/Province:	IL	State:	IL 💌
Zip/Postal Code:	60157	Zip:	60157



## General Information Company Holidays

To edit the holiday schedule for the current and future calendar years, go to the Setup page within the system.

- 1. From Setup: Find the "General" section
- 2. You'll be presented two choices: <u>Select "Company</u> <u>Holidays"</u>
- 3. The system will now display a calendar with the current month

Go through each month and select what days the City recognizes as holidays so that the system does not count that day against you when handling time sensitive material.

To select specific days:

Hover over each day that is a holiday. A little pointer finger will appear. Select the day. When the day has been set as a holiday, it will now appear red. Go through every month and select all holidays.

Comp	any Holi	days						
Save	🚞 Ret	urn						
Indicatin reporting the days	g compa g on issue in the c	ny holiday e status. S alendar. P	vs helps p Select/de Press the	rovide a r -select al Save but	nore accu the com ton wher	urate mea pany holio n finished.	sure whe lays by cl	n icking
		Fe	ebruary		2013	•		
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	27	28	29	30	31	1	2	
	3	4	5	6	7		9	
	10	11	12	13	14	15	16	
	17	18	19	20	21	22	23	
	24	25	26	27	28	1	2	
	3	4	5	6	7	8	9	

Once all days are selected: Click "Save"

Comp	any Holidays		
📙 Save	📔 Return		

🖗 General

Company Holidays

Company Work Schedule

Indicating company holidays helps provide a more accurate measure when reporting on issue status. Select/de-select all the company holidays by clicking the days in the calendar. Press the Save button when finished.

	F	ebruary		2013	•	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9
Holida	iys					

Holidays





## **Company Work Schedule**

To edit the work schedule for your City, go to the setup page within the system.

- 1. From Setup: Find the "General" section
- You'll be presented two choices: <u>Select "Company Work</u> <u>Schedule"</u>
- 3. The system will now display a check list of days and times

#### Setting specific days and time:

- Check the box next to each day that the City is open
- Set the corresponding business hours
- Select the correct time zone

👩 Company	Work Schedule	
<b>D</b> . <b>E</b>		
Save 🦢	Return	
O Specify	your normal work days and office	hours below, to be used for workflow and/or reporting
Day	Start Time	End Time
Sunday		
Monday	8 💌 00 💌 AM 💌	5 V 00 V PM V
🗵 Tuesday	8 💌 00 💌 AM 💌	5 💌 00 💌 PM 💌
🗷 Wednesd	ay 8 💌 00 💌 AM 💌	5 💌 00 💌 PM 💌
📝 Thursday	8 💌 00 💌 AM 💌	5 💌 00 💌 PM 💌
<table-cell> Friday</table-cell>	8 💌 00 💌 AM 💌	5 💌 00 💌 PM 💌
Saturday		
Time Zone:	(GMT-06:00) Central Time	(US &

Once all hours are set: Click "Save"

#### 🎲 General

- Company Holidays
- Company Work Schedule



## Security Settings – Staff Accounts

## **Editing/Deactivating an Existing User**

In certain situations you might be required to edit an existing staff member's account or even deactivate their account so they will not be able to login in to the system.

#### Editing:

- 1. To EDIT a still active staff members account: Find the "Security" section
- 2. You will be presented several choices: <u>Select "Staff"</u>
- 3. The system will now display a list of all staff members

#### 🔂 Security

- Departments
- Security Options
- Security Profiles
- Staff

Find the staff member whose information you need to update. Select the pencil next to their name to edit.

*	×	cgunderson	Carla	Gunderson	cgunderson@webqa.net	Site Administrator	FOIA ADMIN	Yes	2/1/2013 10:36:24
_									API

#### Make any appropriate changes to the staff members account such as:

-Login -First Name	Details	
-Last Name	*Login:	cgunderson
-Email Address -Department	*First Name:	Carla
-Security Profile	*Last Name:	Gunderson
	*Email Address:	cgunderson@webqa.net
	Password:	••••
	Notes:	
	*Department:	Site Administrator
	Security Profile:	FOIA ADMIN
	Field Visibility Codes:	
		Enabled
		View Their Issues ONLY
		Show Call Center Dashboard Option - Agent
		🔲 Show Call Center Dashboard Option - Manager
Once all edits are made: <u>Click "Save"</u>		





#### Deactivating:

- 1. To DEACTIVATE a still active staff members account: Find the <u>"Security" section</u>
- 2. You'll be presented several choices: <u>Select "Staff"</u>
- 3. The system will now display a list of all staff members

Find the staff member whose account you need to deactivate. Select the pencil next to their name to edit.

E & cgunderson Carla Gunderson @webqa.net Site Administrator FOIA ADMIN Yes 2/:	1/2013 ):36:24 M	
---	------------------------	--

Within the staff members account information, there is an Enabled check box. By un-checking this box, the staff member can no long access the system. Also by deactivating their account, while they cannot access the system, the system will store all history that this user has ever done.

Details	
becaus	
*Login:	cgunderson
*First Name:	Carla
*Last Name:	Gunderson
*Email Address:	cgunderson@webqa.net
Password:	••••
Notes:	
*Department:	Site Administrator
Security Profile:	FOIA ADMIN
Field Visibility Codes:	
	Enabled
	View Their Issues ONLY
	Show Call Center Dashboard Option - Agent
	Show Call Center Dashboard Option - Manager

Deactivating an account is the better alternative than deleting a staff member. If you delete their account, you will lose all history in the system.

Once you've unchecked the Enabled box: Click "Save"

#### 🔒 Security

- Departments
- Security Options
- Security Profiles
- Staff





## Adding a New User

Whenever a new employee is hired at the City and they will be using the system, they will need a staff account created for them.

- 1. To add a new staff members account: Find the <u>"Security" section</u>
- 2. You'll be presented several choices: <u>Select "Staff"</u>
- 3. The system will now display a list of all staff members

#### 🔒 Security

- Departments
- Security Options
- Security Profiles
- Staff

Staff		
Add New Dpdate Checked	Export 🗲 Return	to Setup
🔲 Login 📥	First Name	Last Name
	Add New Staff Details	lTuron
	🔚 Save 🛛 🐚 Save ar	nd Add Again  🗎 Return
	Details	
	*Login:	jsmith
Fill out all required information for the new staff member. Remember to check	*First Name:	John
the "Enabled" box. <u>Click "Save"</u> when	*Last Name:	Smith
complete.	*Email Address:	jsmith@internet.com
	Notes:	
	*Department:	Inspections
	Security Profile:	End User New
	Field Visibility Co	odes:
		Enabled

On the top of the page you will find a button that is labeled "Add New". Select "Add New"



📑 - 📑 -

## **Managing Requests**

## **Letter Templates**

When your system is first implemented, we will import your letter templates for you (if you have provided us with any). However, sometimes you might need to add new ones later on by yourself or make edits to any current ones.

Editing:

- 1. To edit a letter template: Find the <u>"Requests" section</u>
- 2. You will be presented several choices: <u>Select "Letters"</u>
- 3. The system will now display a list of all the current Letter Templates saved in the system

- 📒 Requests
- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
   Drepared Responses
- 4. To edit a current letter template: Select the pencil to the left of the template

🎲 Setup - Letter Templates

🔜 Add	l New	🐍 Return to Setup	
		Name *	Туре
	×	Base Template	HTML
Ø	×	Base Template with Image Center	HTML
	×	Clarification Letter	DOC
	×	Documents Attached/Enclosed Letter (No Charge)	DOC
	×	Fee Letter	DOC
	X	No Responsive Documents Letter	DOC
	×	Test Fee Letter in Regular format	DOC

5. Click on the link under the Current Template Details. The document will now open in Microsoft Word.

Setup - Letter Temple	ates
🖳 Caura — 🗙 Dallata — 🕞	Debug
📄 Save 🕆 Delete 🍙	Return
*Name:	Fee Letter
Output:	Doc
Source:	Choose File No file chosen
Current Template De	tails
Name:	Fee Letter
Output:	рос 🖑
File Size:	2383491





6. Make all changes to the current letter template. Once changes are made, resave the document to your computer.

- 7. To add the new, edited letter template: Click "Choose File"
- 8. Select the updated letter template from your computer to replace the old one that is currently in the system. Click "Save" when finished.

10	Setup - Letter Templates	
1	🖥 Save 🗙 Delete  Return	
6		
	*Name:	Fee Letter
	Output:	Doc
	Source:	Choose File FOIA Implemonnaire.doc
L		<b>*</b>
ſ	Current Template Details	New File to Replace Old
	Name:	Fee Letter ┥
	Output:	DOC
	File Size:	2383491



Column Latter Templeter



#### Adding a New Letter Template:

- 1. To add a new letter template: Find the <u>"Requests" section</u>
- 2. You'll be presented several choices: <u>Select "Letters"</u>
- 3. The system will now display a list of all the current Letter Templates saved in the system
- 4. To add a new letter template: <u>Select "Add New"</u>

#### 🚞 Requests

- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Dranarad Rachancac

50	8 <b>3</b> e	cup -		Lø*	Lø
15	Add	New	🗲 Return to Setup		
1					
			Name		Туре
		×	Base Template		HTML
		×	Base Template with Image Center		HTML
		×	Clarification Letter		DOC
	Ø	×	Documents Attached/Enclosed Letter (No Charge)		DOC
		×	Fee Letter		DOC
	Ø	×	No Responsive Documents Letter		DOC
	6	×	Test Fee Letter in Regular format		DOC

Build out your new letter template in Microsoft Word and save it to your computer. Make sure to include all merge tags. If you are unfamiliar with merge tags, please refer to page 33 of this manual.

1. Change your drop down option for Output to Doc

*Name:		
Output:	HTML	
Source:	HTML PDF Doc	





2. Fill out the file name and select the "Choose File" button to pull the document off of your computer

🌼 Setup - Letter Templates	
🔚 Save 🛛 🔀 Cancel	
*Name:	
Output:	Doc
Source:	Choose File No file chosen

3. Once you've attached the new letter template from your computer: <u>Click "Save"</u>

Your new letter template is now saved in the system.





## **Prepared Responses**

When your system is first implemented, we will create prepared responses (e-mails [if you have provided us with any]) for you. However, sometimes you might need to edit current ones or add new ones later on by yourself.

Editing:

- 1. To edit a prepared response: <u>Find the</u> "Requests" section
- You'll be presented several choices: <u>Select</u> <u>"Prepared Responses"</u>
- 3. The system will now display a list of all the current prepared responses saved in the system
- 4. To edit a prepared response, click on the pencil to the left of the pasted response you want to edit

#### 📋 Requests

- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses
- Properties/Locations

Prepared Response
 Add Prepared Response
 Responses
 Responses
 Base Template
 Base Template with Image Center

Make any changes needed to your letter template. Click "Save" when finished.

#### Creating a Prepared Response:

- 1. To add a new prepared response: Find the <u>"Requests" section</u>
- You'll be presented several choices: <u>Select</u> <u>"Prepared Responses"</u>
- 3. The system will now display a list of all the current prepared responses saved in the system

#### 🖞 Requests

- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses
- Properties/Locations





 To add a new prepared response: Select <u>"Add Prepared</u> <u>Response"</u>

Add	d Pre	pared Response 😨 Categories
		Responses A
	×	Clarification Email
	×	Documents Available Online
	×	Documents Ready for Viewing
		1
		*Name

- 1. Name your prepared response
- 2. Type your prepared response just like you would a letter. You should use merge tags for fields that should be merged in (e.g. [CURRENT\_DATE], [REFERENCE\_NUMBER], etc.). If you are not sure how merge tags or custom fields work, please refer to page <u>31</u> of this manual. You can also look at the prepared responses that were added to the system when it was implemented and use them as a reference.
- 3. Once you have finished working on your prepared response, <u>Click "Save"</u>





## **Request Types**

## **Custom Fields**

Within your Request Type you will have the ability to create custom fields. Custom fields are the areas that your citizen would fill out on the portal regarding their request or your staff user would fill out when entering a new request into the system on behalf of a citizen.

- 1. To add a custom field: Find the <u>"Requests" section</u>
- You'll be presented several choices: <u>Select "Request</u> <u>Types"</u>
- 3. Select the request type that you need to add the letter template to by clicking on the pencil to the left of the request
- 4. Once you are in the request, you will see several management tabs located on the top: Select "Custom Fields"



Requests

- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses
- Properties/Locations
- Request ActivitiesRequest Origin
- Request Public Summary Setup
- Request Public Summary Setup For Mobile
- Request Types



5. When you are in the custom field tab: Select "Create and Add"

Request 1	Types - Open Rec	ords Request				
Details	Custom Fields	Categories	Statuses	Defaults		
🗟 Add/Remov	add/Remove/Sort Items 🛛 🚞 Return					
Associate	Associated Items					
HR Type of Public Re Preferred Documer Extensio	Information Reques cord Desired d Method to Receiv nts Delivered By n Requested	sted e Documents	Create Edit	Selected		





6. Fill out all required (highlighted) fields. Fill out Merge Tag field if you need this custom field in a letter template. Check if you want this custom field visible via the portal/when staff member is creating a new request. Click "Save" when finished.

Save and Add Ag	jain 🔚 Return	
etails		
Field Name:		Title in system
Field Type:	Checkbox	Way you want info captured
Group Name:		Header subject that
Merge Tag:		will appear above fields
CheckboxList Options — Prompt:		
Width of Box:	200px (ex. 25px)	
Helper Text:		
	Portal Only	
Helper Text Mode:	RIGHT	•
Other Attributes:		
Other Attributes:	Field is Mobile Enabled	





Once saved, your custom field will now appear on your list of custom fields. If you need to rearrange the order of your custom fields, select "Add/Remove/Sort Items" on the top tool bar. A pop out window will appear. Select which custom field you would like to move by clicking it. Rearrange the list by selecting the up/down buttons on the right.





7. Click "OK" when finished.





#### Statuses

Within your Request Type, you will have the ability to create statuses for your Requests Types and set what statuses close (lock) your requests. Closed statuses do not allow a citizen to make any changes to their request after they have submitted it on the portal.

- 1. To add a status: Find the "Requests" section
- 2. You'll be presented several choices: Select "Request Types"
- 3. Select the request type that you need to add the status to by clicking on the pencil to the left of the request
- 4. Once you are in the request, you will see several management tabs located on the top: Select "Statuses"

💮 Request Types - Open Records Request						
Details	Custom Fields	Categories	Statuses	De		
🔚 Save 🛛 🖺	Return					
*Service Red	quest Type:	0.00	n Pocorde Poquae	+		

- 🗎 Requests
- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses Properties/Locations
- Request Activities
- Request Origin
- Request Public Summary Setup
- Request Public Summary Setup For Mobile
- Request Types

*Service	Request	Type:
----------	---------	-------

Open Records Request

5. When you are in the statuses tab: Select "Create and Add." A pop up window will appear

💮 Request Types - Open Records Request				
Details	Custom Fields	Categories	Statuses	Defaults
Add/Remove en Activities Ass Associate	e Items (C) Updat igned to Me ed Items	e Closed Status	es 📔 Return	
Assigned Extension Full Relea Need Cla No Recon Partial Re	n Requested ase rification rds Exist elease		Create	and Add





6. Type in the new status in the New Value filed. Click "Save" when finished. Click "Done" when you are finished entering in all of your new statuses.

webyn	www.mixuonita.aphillesita	
쿶 Edi	t Request Status List Values	
	New Value	
	Test Status	Save
	Inactive	dm)
	Existing Values	
	Approved to Proceed Assigned Clarification Requested Cost Estimate Sent Exemption Denial	<ul><li>▲ Edit</li><li>■ Delete</li></ul>

Your new status will automatically add to your complete list of statuses. If you wish to add this status to your list of closed statuses, click "Update Closed Statuses" on the top.

Request Types - Open Records Request					
Details Custor	m Fields Categories	Statuses	Defaults	Gr	
🔄 Add/Remove Items	Closed Statuse	s 🔄 Return			
Associated Item	s				
Assigned Extension Reques Full Release Need Clarification No Records Exist	sted	<ul> <li>Create</li> </ul>	and Add		





7. Another popup window will appear. Move over your available status to the selected side by highlighting it and clicking the arrow over. Click "OK" when finished. Your status will now lock the request from any edits by the customer.



## **Responses & Letters**



After you have finished creating and/or editing your letters or prepared responses, you will need to associate them to the request type – otherwise they will not show as available.

- 1. From Setup: Find the "Requests" section
- 2. Select: <u>"Request Types"</u>

Request Types

Letters

- Statuses
- Workflow
- 3. Search for the request type (more than likely, you will just have one) and click on the pencil
- At the top, you will see multiple tabs. Click on <u>"Responses"</u> or <u>"Letters"</u>
- 5. Click on <u>"Add/Remove Items."</u> A new window will come up: In the left column you will see a list of the letters/prepared responses that you have available to select. On the right, you will see a list of the letters/prepared responses that are already associated to that specific request

Responses

Open Records Request - Prepared Responses				
Available	Selected			
Base Template Base Template with Image Cent	<ul> <li>Clarification Email</li> <li>Cost Estimate with Deposit</li> <li>Cost Estimate with No Deposit</li> <li>No Records Exist</li> <li>Receipt Confirmation</li> <li>Response with Fees</li> <li>Response with Fees and Redact</li> <li>Response with No Fees</li> </ul>			

6. To associate that letter/prepared response with the request, simply double-click it and it will be moved over to the <u>"Selected"</u> column. Click <u>"Save"</u>

🗔 Open Records Request - Prepared Responses			
Available	Selected		
Base Template with Image Cent 🔺	Clarification Email Cost Estimate with Deposit Cost Estimate with No Deposit No Records Exist Receipt Confirmation Response with Fees Response with Fees Response with No Fees Base Template		



## Confirmation

After a customer submits a request, we can display a confirmation message as well as send them an email.

- 1. From Setup: Find the "Requests" section
- 2. Select: <u>"Request Types"</u>

- Request Types
- Statuses
- Workflow
- 3. Search for the request type and click on the pencil
- 4. At the top, you will see multiple tabs. Click on <u>"Confirmation"</u>

Letters	Confirmation

5. For the confirmation email, you can free type in the box provided or you can use a prepared response. If you use a prepared response, <u>be sure to follow the steps</u>...

Emai	Message Options
Send	<ul> <li>Text</li> <li>Prepared Response</li> <li>Do not send</li> </ul>
Mess	age Text:
Q 8	
De	ar ( <u>FIRSTNAME</u> ) ( <u>LASTNAME</u> ).
Tha	ank you for using the City's FOIA Center. Your request has been logged into our system and routed to the appropriate department for action.
F	DIA Procedures
An	y person who wishes to inspect and/or obtain copies of public records from the City shall follow the rules below, in accordance with the Freedom of Information Act, effective July 1, 1984.

To display an on-screen confirmation message after a customer submits a request, use the "Screen Message" box.



After you have finished editing or creating your confirmation messages, Click "Save"



## Workflow

## Managing Workflow Rules

The system allows you to create custom rules to automatically route out your request to the correct individual. This is something that is set up by your Implementation Coordinator. However, as you start to make changes to your system, you might need to create new workflow rules. Workflow rules can become incredibly difficult and are very in-depth. If at any time you are unsure about what rules to create, contact customer support and they will walk you through the process. However, below is a quick guide for your reference.

Within the system there are 3 different types of workflow rules that can run:

- Item created Rule: This will apply to any match on the initial creation of a request type. For example: Type of Information Requested = Budget Records, THEN set assigned staff to Carla Gunderson
- 2. **Matching Conditions Rule**: This will apply to already created requests. This rule looks for a specific condition or set of criteria in order to trigger an action. For example: If Legal Review Required = Yes, THEN Send email to assigned staff
- 3. **Timed Rule**: This is a rule that will occur after a specified amount of time. For example: If a request has been open for 6 hours AND initial legal review completed DOES NOT EQUAL yes, THEN Send email to Harry Romney

#### Every Workflow rule contains criteria (or a set of criteria) AND an action

The criterion is broken down into "Audit Log" and "Change Conditions":

- Audit Log Conditions: These are system fields such as status, assigned staff, assigned department. These fields require a change. For example: If assigned department changes from "Anything" to "Human Resources" THEN Send Email to Carla Gunderson and Harry Romney
- 2. **Change Conditions**: These are all other custom fields: For example: Type of Information is a type of change condition





Please see below for an example of each in the system:

Audit Log Change Condition	IS To: READY FOR REVIEW - LAW		 Audit Log Conditons
Audit Condition to Add			
Field:	Status	▼	
Changed From:	Anything	•	
To:	Anything	•	
	Add Audit Condition		
Other Change Conditions Attorney Staff Member = Change Condition To Add	Benjamin Sampract		Change Condition
Field:	Account Name	•	
	Equals	•	
Value:			
	Check Is Null		
	Add Other Condition		

Actions will specify what needs to occur if the conditions are met. There are different types of Actions you will be able to do:

- Set Assign Staff to a Request
- Send Email to Assigned Staff
- Send Email to Individual
- Set Status
- SLA Pause/Resume
- Create Activity

Existing Actions					
🗙 Send Email to Assigned Sta	× Send Email to Assigned Staff: Using '3 Day Reminder'				
🗙 Send Email to Individual:	cgunderson@webqa.net Using '3 Day Reminder'				
Action to Add					
Action:	Add Admin Follower	Add Action			
Staff:	Created By	<ul> <li>NOTE: "Send Email To Assigned Staff" will not apply to "Portal Create" rules</li> </ul>			





## **Creating a New Workflow Rule**

- 1. To add a new workflow rule: <u>Find the</u> <u>"Request" section</u>
- 2. You'll be presented several choices: <u>Select "Workflow"</u>
- 3. The system will now display a list of all workflow rules: Select "Add New"
- 4. The first window will display to set up the description and the rule type.
- 5. The only information required for this part is the Description, Service Request Type, and Rule Type

#### Requests

- Activities
- Admin Options
- Categories
- Custom Fields
- Data Map
- FOIA
- Letters
- Prepared Responses
- Properties/Locations
- Request Activities
- Request Origin
- Request Public Summary Setup
- Request Public Summary Setup For Mobile
- Request Types
- Statuses
  Workflow

Details		Ti	tle of Your Rule
Comments:		De	scribe What the Rule Will Do
Service Request Type Equals:	Open Records Request	^	Select the Request Type this Rule Applies to
	Apply To All Service Request Types	5	
Rule Type			
Request Created			
Timed Rule	1 Hou	ur(s)	✓ Have Elapsed Since

Matching Co	nditions
-------------	----------

NOTE: Verify "Frequency" to prevent infinite loop.

Scheduled Rule

### To Complete Rule Type:

- If this is a "Request Created" or "Matching Conditions" rule-select and click "Save"
- If this is a "Timed Rule" select the appropriate time constraints (Typically you will select "X Working Hours have elapsed since Request Created"

Request Created

- Click "Save"
- The rule will close and register and you must find your new rule and click on the pencil in order to edit
- Add in a condition(s)





- Add in an action(s)
- Save!

Remember: A request can only have 1 assigned staff member at a time

## **Merge Tags**

When creating a new letter template, you might need to use merge tags. Merge Tags are located in different locations of the system. Merge Tags can either be found in the custom fields or the prepared responses.





#### Within Custom Fields:

- To find a merge tags within custom fields: <u>Find the</u> <u>"Request" section</u>
- 2. You'll be presented several choices: <u>Select "Custom Fields"</u>
- 3. The system will now display a list of all custom fields in the system
- 4. The fourth column labeled "Merge Tags" is the merge tag you will need to pull that field automatically in a letter template

- 📒 Requests
- Activities
- Admin Options
- Categories
- 🔹 Custom Fields 🚽 🗕
- Data Map
- FOIA
- Letters

🎲 Set	up - Request Custom Fields			_	
🗒 Add	Custom Field 🛛 📔 Return				
	Name 🔺	Prompt	Field Type	Merge Tag	C
6	Additional Exemptions Details	Additional Exemptions Applied	Memo	[exemptions]	
	AG ID Number	AG ID Number	Teythoy	[adIDnumber]	

If the custom field does not have a merge tag:

- 1. Click the pencil next to the custom field you need to create a merge tag for
- For brand new merge tags created by a user, the merge tag must appear in all capital letters. If a space is needed, you will have to use an underscore Example: [HOME ADDRESS]

🔅 Edit Custom Field		
🔚 Sayen 📭 Copy 🗙 Del	lete 🔀 Close	
Details		
*Field Name:	AG ID Number	
Field Type:	Textbox	•
Group Name:		
Merge Tag:	AG NUM	
Within Prepared Response:		
Merge Tags are found in two sp	ots within the prepared resp	oonses:
<ol> <li>To find a merge tags within p "Request" section</li> </ol>	repared responses: Find the	📋 Requests
		<ul> <li>Activities</li> </ul>
		Admin Options
VebQA Confidential and Proprietary	31	Categories
		Custom Fields
		<ul> <li>Data Map</li> </ul>

- FOIA
- Letters





- You'll be presented several choices: <u>Select "Prepared</u> <u>Responses"</u>
- 3. The system will now display a list of all prepared responses in the system
- 4. Select the pencil next to any prepared responses currently in the system or select Add Prepared Responses

Prepared Response		
🔜 Add Prepared Response	🤯 Categories	🗲 Return to Setup
Responses *		
🖉 🍊 Paco Tomplate		Either one will bring you to a
Base Template v	ith Image Cente	list of system merge tags

Within the prepared response, merge tags are located in two places:

Drop down list: Click on the arrow. This will display a drop down list of all merge tags.

	Base Template	
	Category	•
	💁 💝 🐰 🖻 🛍 🗒 2 🖉 🕫 🖪 🖊	· ⊻ <u>A</u> • 🕸 • ≡ ≡ ≡ ≡ 🗐 Ξ Ξ
	😫 👾 📓 \Omega 🛛 Font 🔹 Size 💌	Merge Tags
	[CURRENT_DATE]	Create Date - CREATE_DATE]
	[FIRSTNAME] [LASTNAME]	Update Date NO TIME - [UPDATE_DATE_NO_TIME] Update Date - [UPDATE_DATE]
	[CUSTADDAI] [CUSTCITV] [CUSTST][CUSTZIP]	[CUSTOMER_EMAIL]
orgo To	glist. At the bottom of the prepared resp	nonse is a list of all merge tags

٠

📙 Save 🛛 🗙 Delete 🛛 📔 Return

Web

Category