Apparo Fast Edit

Use case:

Automatic e-mail notifications

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1 Definition

From version 3.1.1, Apparo Fast Edit supports e-mail notifications.
This document focuses on this and shows you a simple example of how to set it up correctly.

2 Benefits at a glance

There are several possible use cases and the most important is probably ‘Automatic e-mail notifications in workflows’.

Immediate notification: As soon as a step in the workflow has been completed, the person responsible for the next step is notified. No time is wasted.

Comfort: The recipient can access the corresponding Business Case directly using backlinks in the message.

All information at a glance: The notification contains all relevant information. All variables and all data or data changes can be displayed in the notification.

Instant decisions: Decisions can be made directly in the notification without further steps. The recipient clicks on Approve or Decline and an Action Business Case automatically changes the status.

3 Example

Our use case contains of a two-step workflows.
Step 1: The user of an office branch enters plan data and sets the status to ‘Ready for approval’.

Step2: The controlling department is revising the entered plan data and can Accept or Decline the entries. Declined entries needs to be changed again by the office branch.

In Step2 we will add now an automatic email notification only for the case the approver declines the entered data.

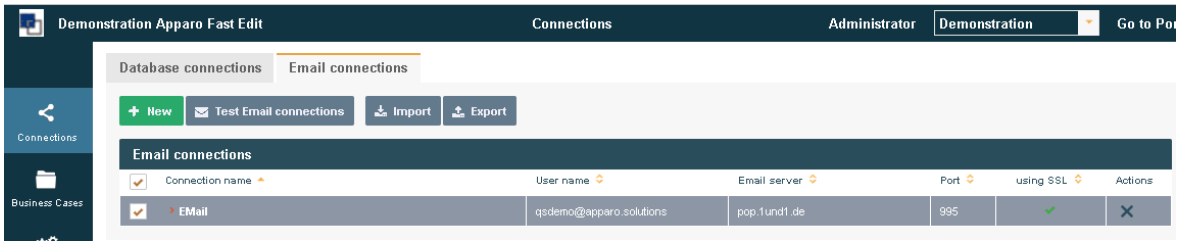
4 Needed parts

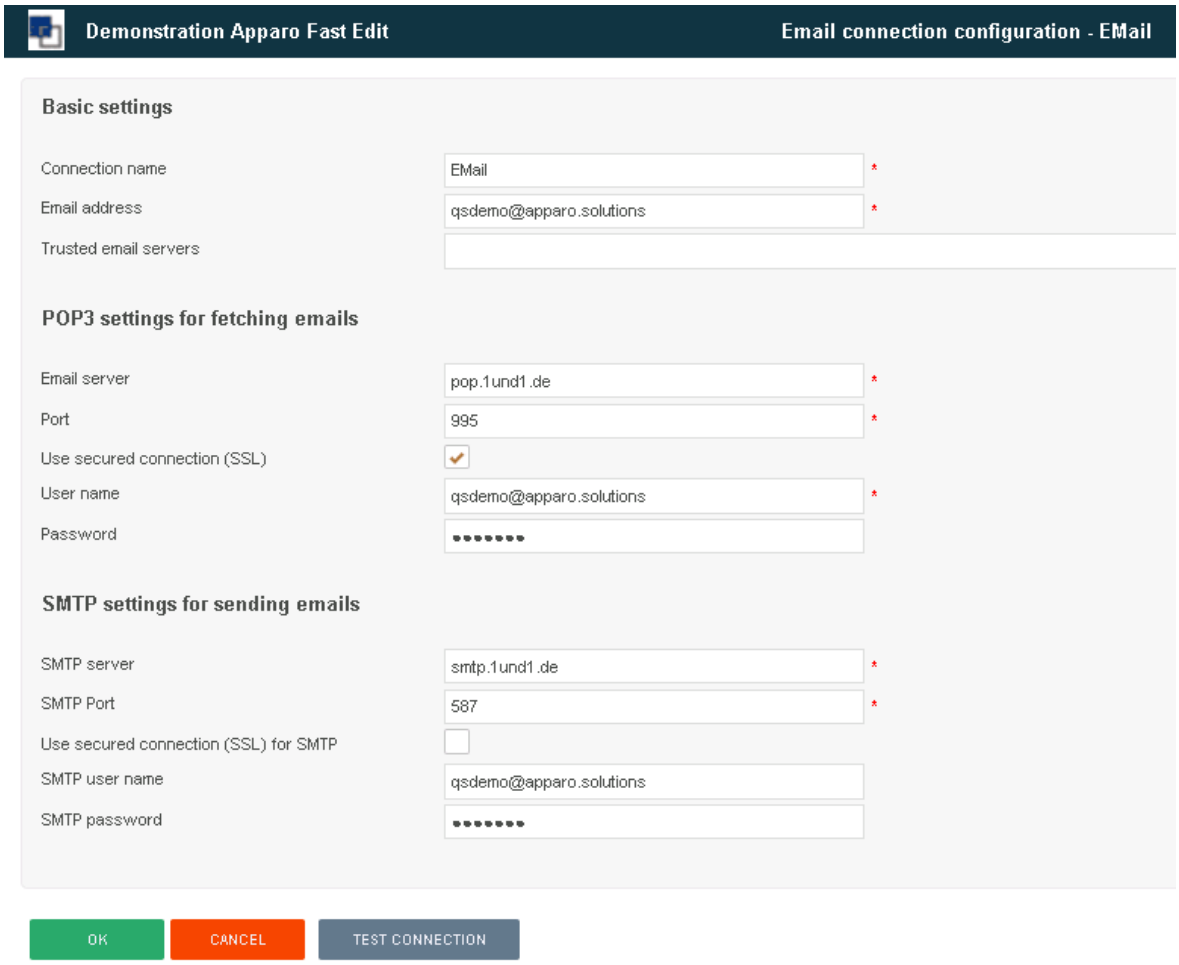
Beside from the already existing two Business Cases of the Workflow demo, we will need additional parts for the notification example:

- An E-mail connection
- An E-mail Business Case (BC)
- A script
- And some changes in our Workflow Business Case

4.1 E-Mail connection

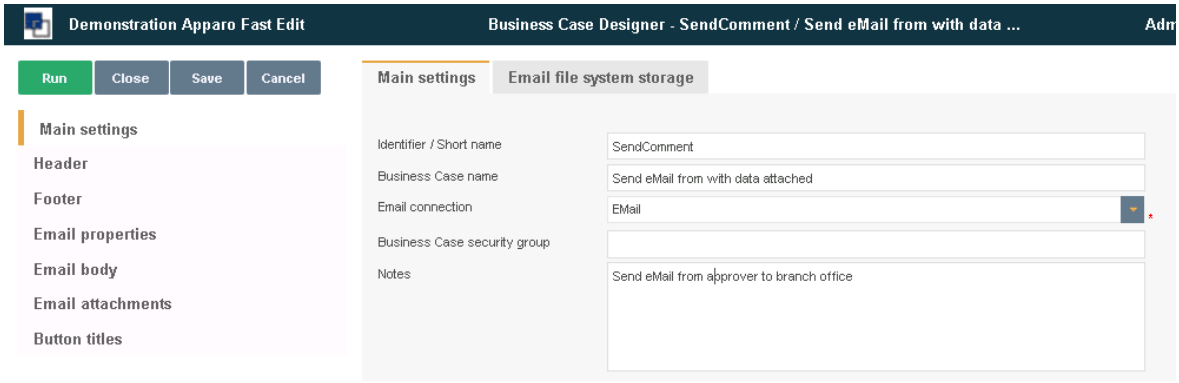
We will need an email connection that can send emails, the SMTP settings are required.



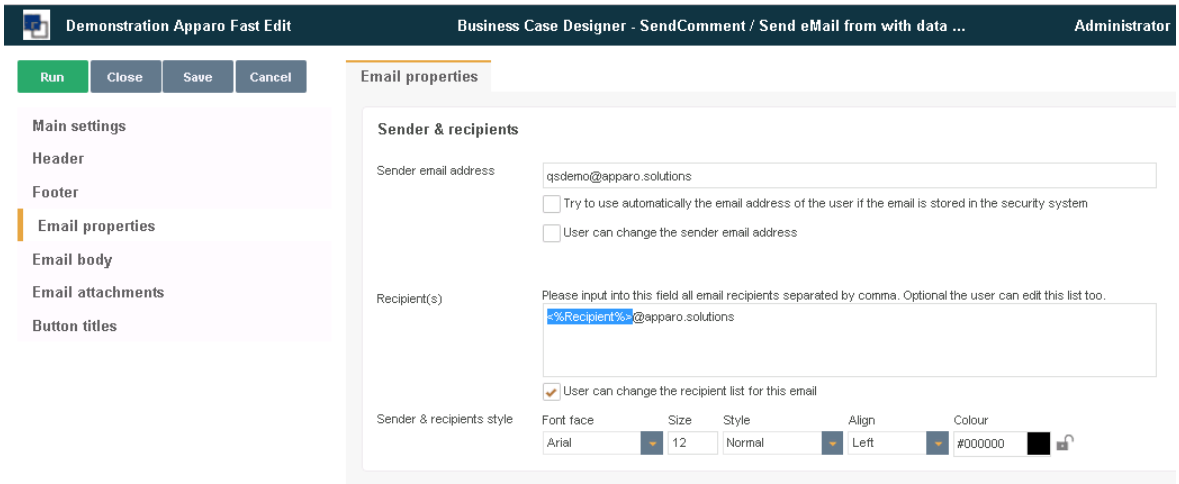


4.2 E-Mail Business Case

The identifier / short name of the E-mail BC will be used later in the script to call it.



In E-mail properties we setup sender and recipient.
The recipient in our example is stored in the column 'Recipient', which is actually the user name.
It is composed of the first letter of the first name, followed by a dot and the surname:

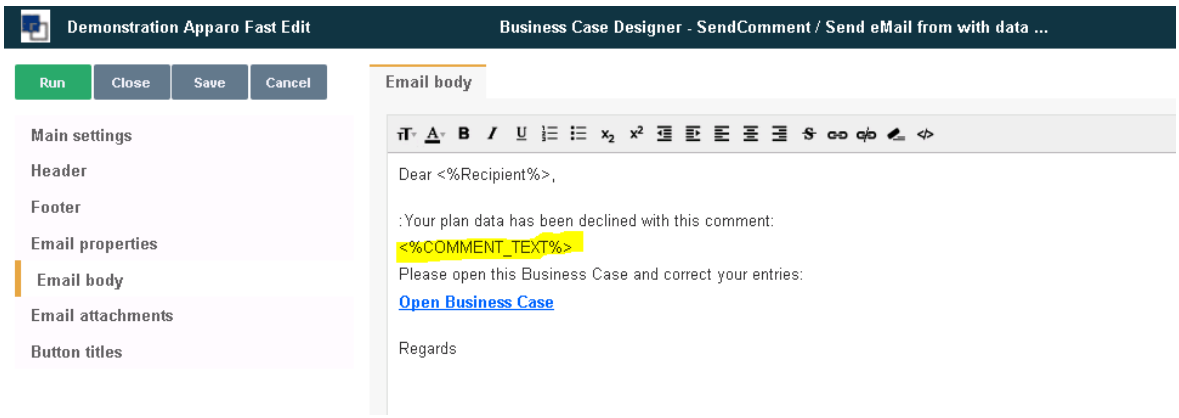


The entry <%Recipient%>@apparo.solutions will be translated to the address: f.surname@apparo.solutions

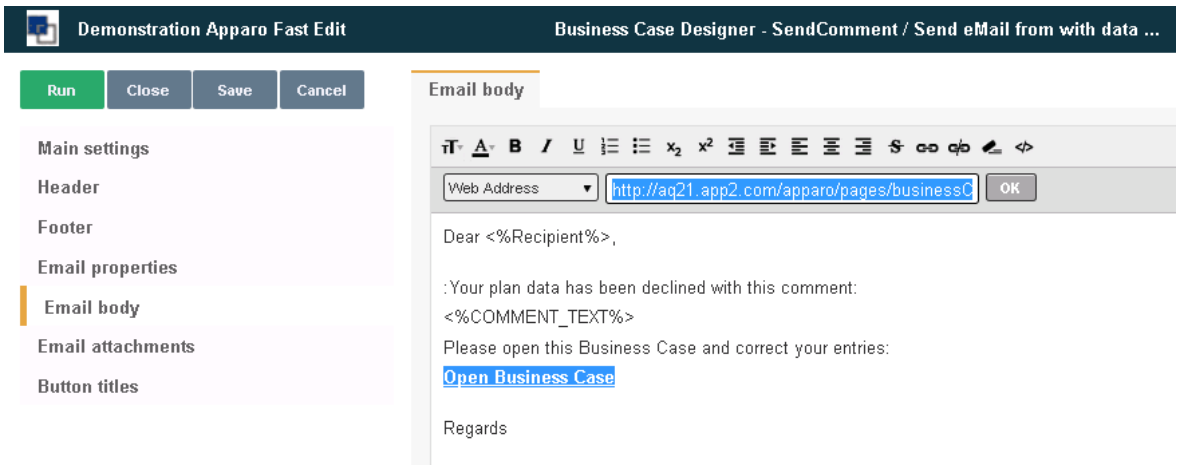
There are several other ways to generate the recipients e-mail address, e.g. by reading it from the security system or from a DB table.

Hint: You can use all variables of the calling Business Case in the settings and the body of the e-mail.

In the e-mail body we deliver the content of the comment, written by the approver.
<%COMMENT_TEXT%> is the Widget reference variable of the corresponding column.



We will also deliver a backlink including a filter to Business Case, which outputs the declined row only.



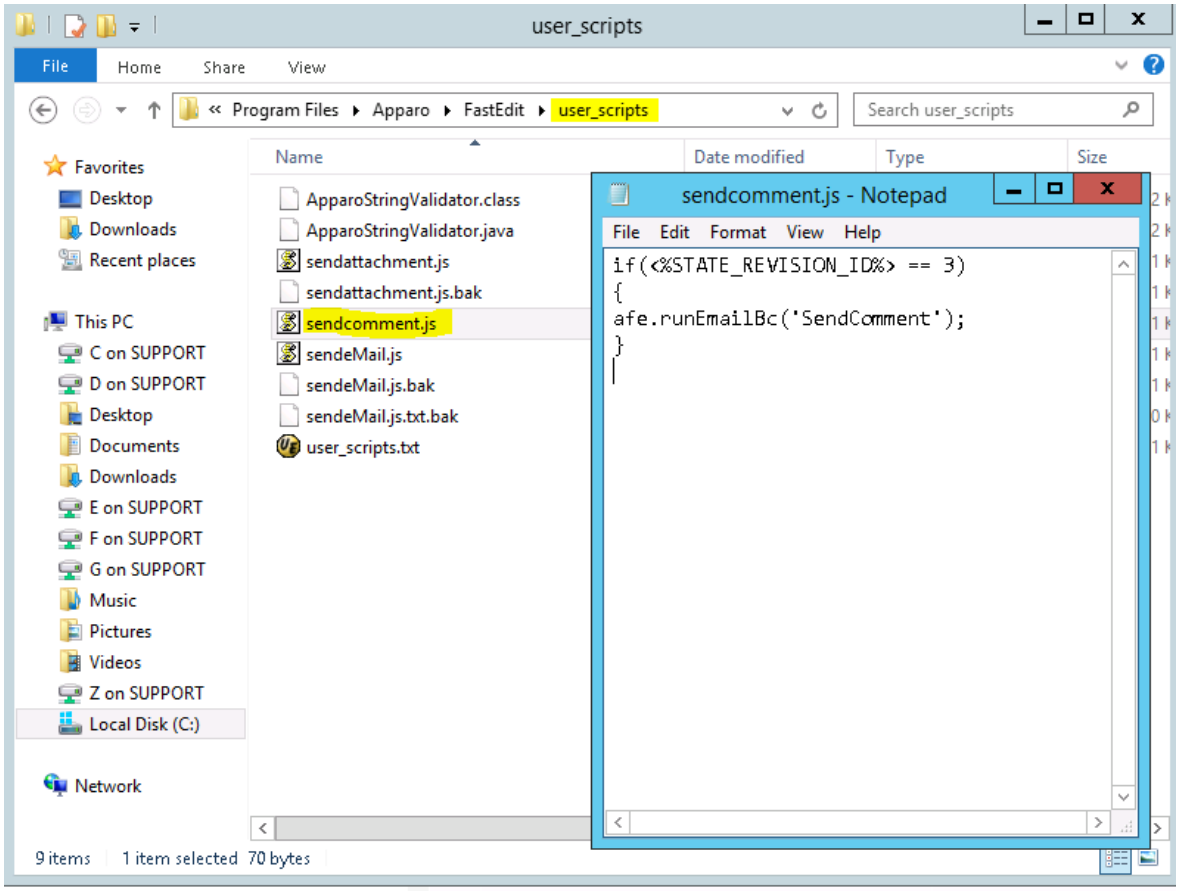
Filters can be added by using the primary key parameters: p1, p2 … pn
With two primary keys you have to attach to the URL:
&p1=<%WidgetReferenceVar_of_PK1%>&p2=<%WidgetReferenceVar_of_PK2%>

Hint: You can find the link to a Business Case in the Main settings.

Depending on the version this is named 'Link to BI/Portal' and the link can be found directly or in the tab 'Advanced'

4.3 Creating the script

JavaScript can be used in variables and also in script files.



To call the E-mail Business Case you have to use this method:
afe.runEmailBc('SendComment');

'SendComment' was the short name of the E-mail BC.

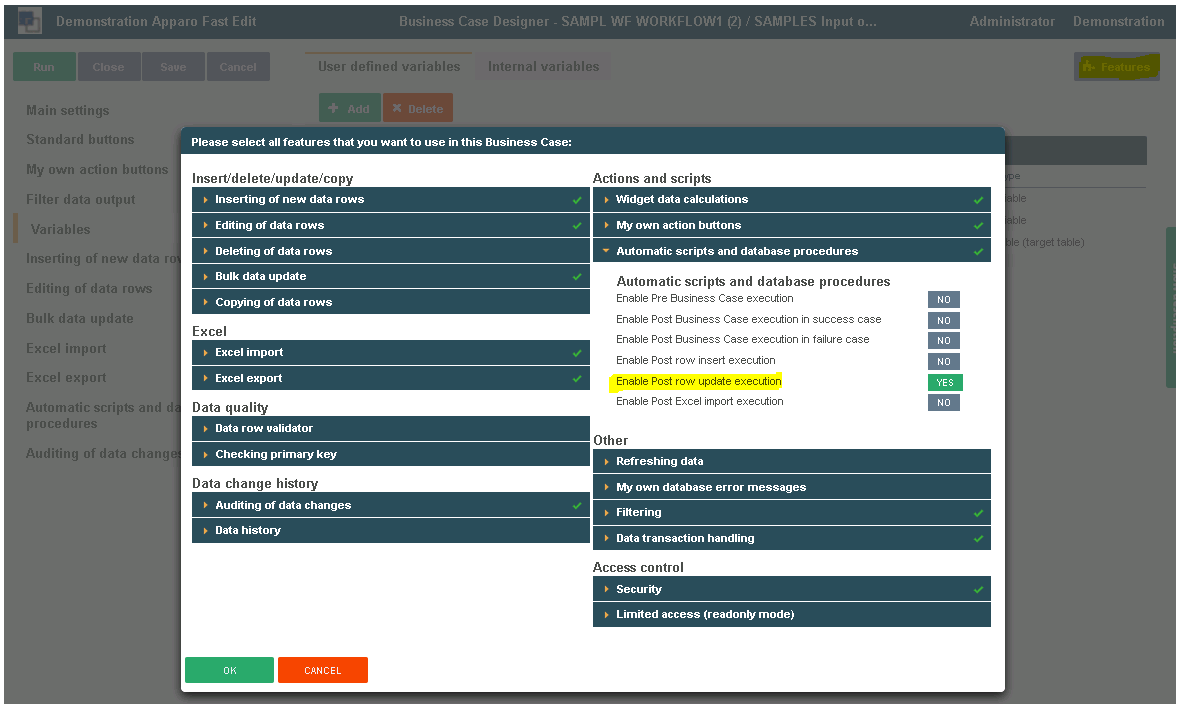
In our example we only want to send an e-mail in case the approver declines the data.
The status declined has the number 3, so we extend our script to be executed only if the status is equal 3:

```
if(<%STATE_REVISION_ID%> == 3)
{
afe.runEmailBc('SendComment');
}
```

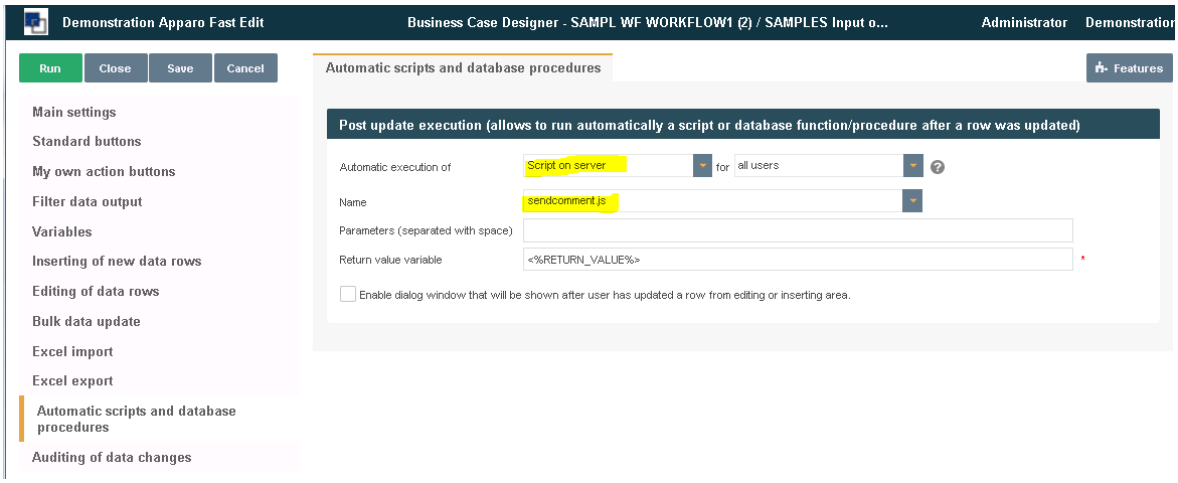
Hint: A complete overview of all JavaScript methods and examples can be found in JavaScript variables. Edit or create one and click the question mark for the description.

4.4 Adapting the Business Case

We want to call the E-Mail BC the moment the user is submitting the entry.
We have to enable the feature: 'Post row update execution', which can be found in 'Features' (top right).

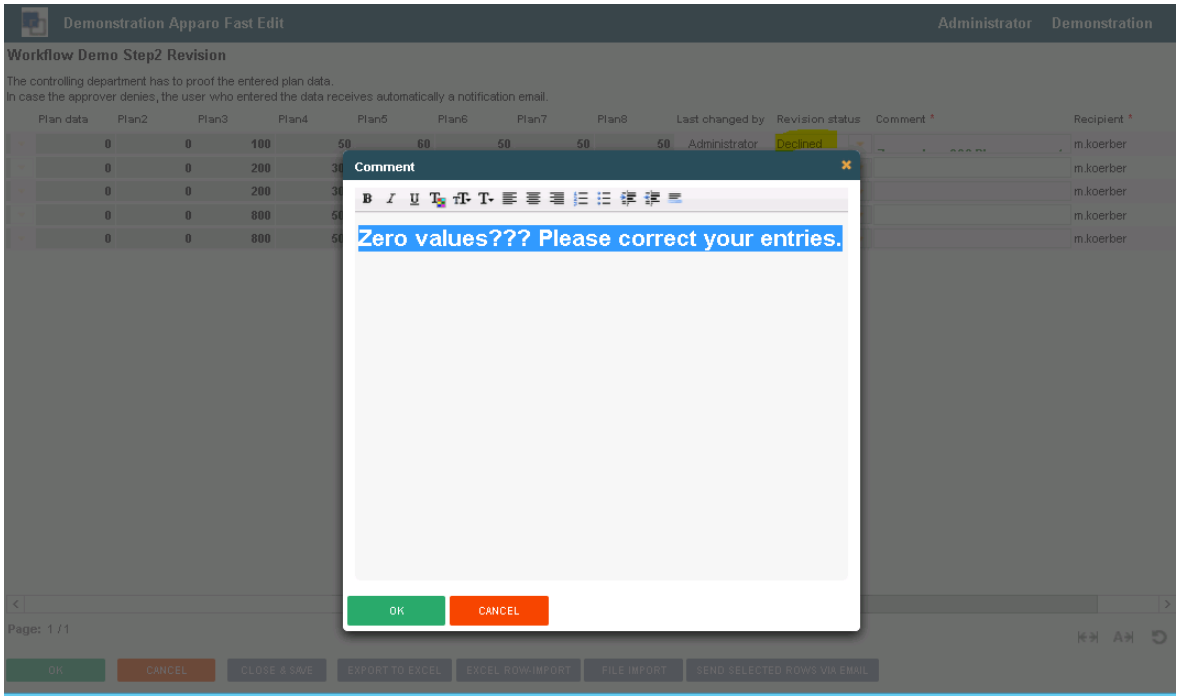


Set the feature to 'Automatic execution of Script on Server' and select the script you have created.



5 Result

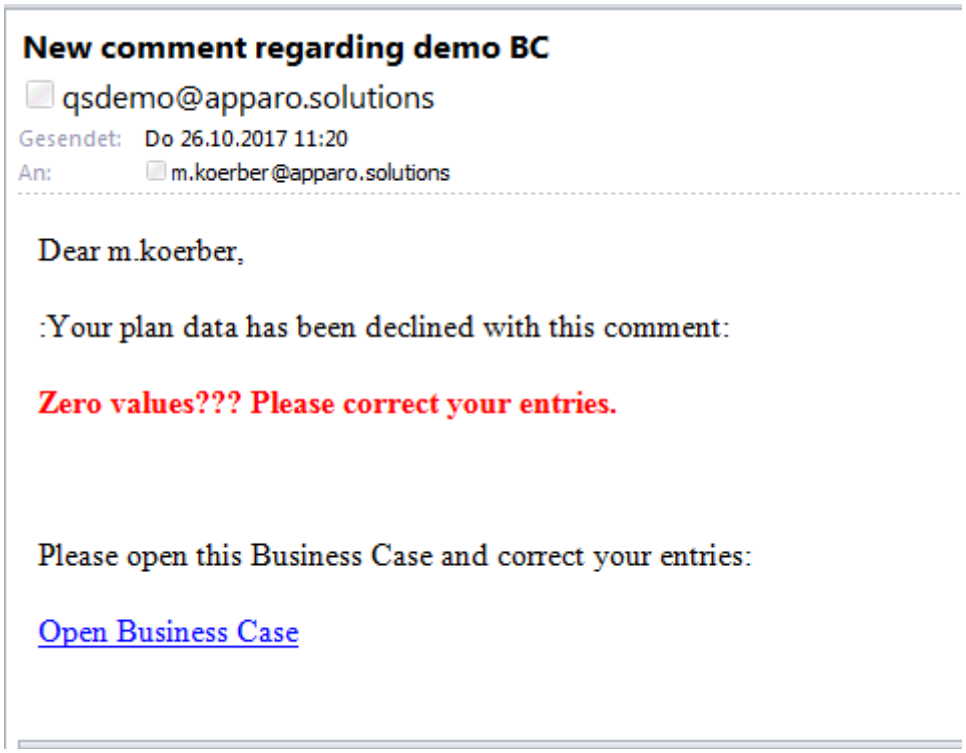
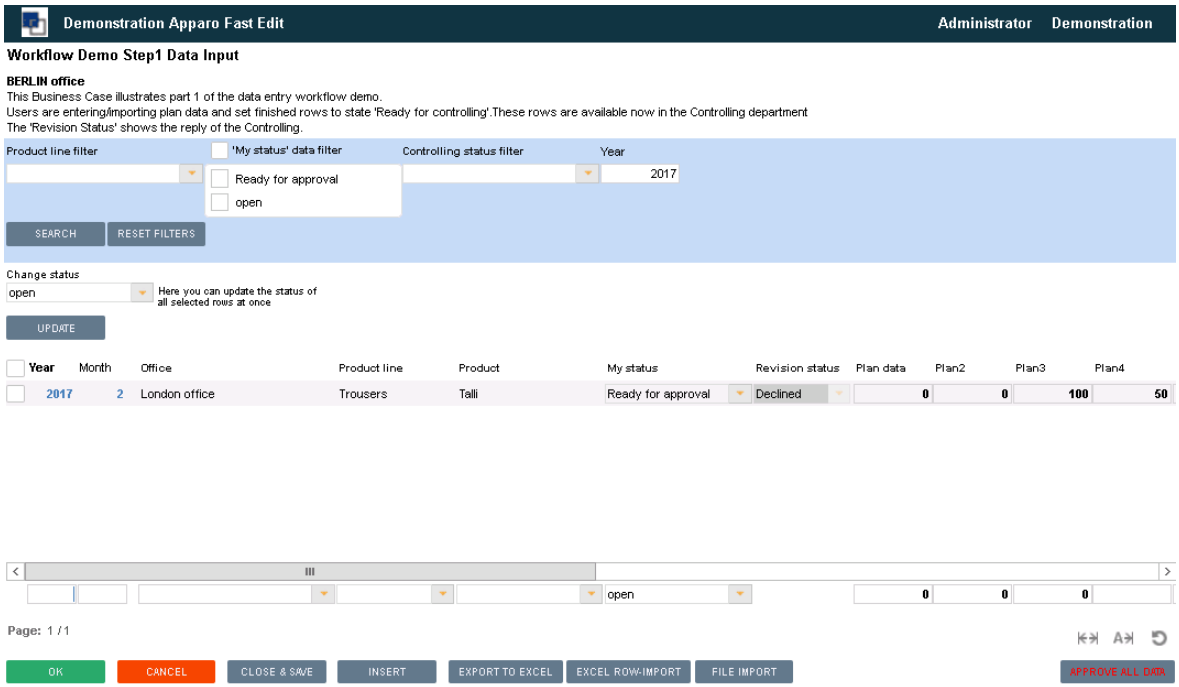
The approver can only accept or decline the data and leave a comment for the branch office.



When the OK button is clicked to store the data, the following happens:

- The script is called
- The script checks for the status
- If the status is declined, the E-mail BC is called
- The E-mail BC is resolving the used variables and sends an e-mail

The branch office receives the e-mail.



By clicking 'Open Business Case' the data mask opens and allows you to correct the entered plan data. The workflow starts again from step 1.