siatel

E-mail templates

Administration Tool

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What is an e-mail template?

You may use the same e-mail in several process tasks. Instead of entering the same message every time, you can create an e-mail template for frequently used messages.

Creating an e-mail template

To create an e-mail template:

1. Open the Gargantua database of your choice, in the Administration tool.
2. Click on the **E-mail template** subbranch.

   The **Manage e-mail templates** window opens.

3. Click on **New**, at the bottom left of the right pane.

   The management screen of the e-mail template opens.

4. Name the new document template, and potentially add a description in the **Name** and **Description** fields.
5. Check the checkbox among the following three, depending on how you want to use the e-mail template:
   - **For general purpose**: to use the e-mail template in another way than in a process or validation cycle;
   - **For processes**: to use the e-mail template in a process task;
   - **For validation cycles**: to use the e-mail template as a customized notification, in a validation cycle.
6. Add potentially the e-mail template to a package, in the **Package** field.
7. In the **Content** section, **Sender** field, enter the name of the e-mail sender.
8. In the **Subject** field, enter the e-mail subject.

   The subject can include attribute markers.

9. Check optionally the **Activate translations** checkbox, to be able to translate the e-mail template into other languages.
10. In the **Message** field, enter the message that will be included in the e-mail body.

    The subject can include attribute markers.

11. Click on **Apply**.

    You have created an e-mail template.

Including attributes

Within an e-mail template, you can include attribute markers that will be automatically filled by an attribute value.

If an attribute is not mandatory in the form, there is a risk that it will not be filled by the user and that the marker will be empty in the e-mail that will be sent. Therefore, it is recommended to make all the attributes used in the template mandatory.

You can include attributes that are not system attributes except:

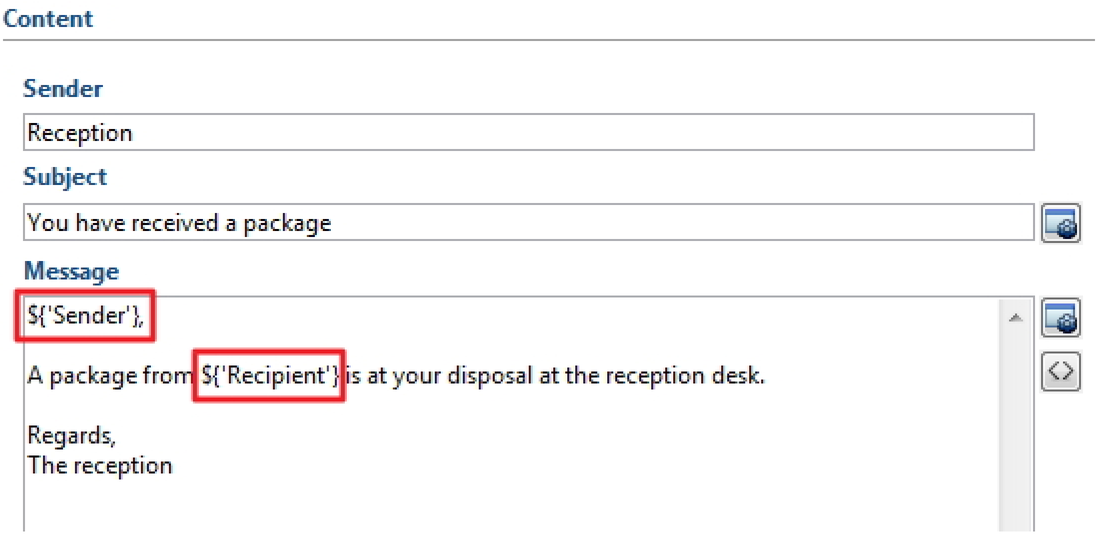
- Timestamp;
- Time of day;
- Time delay.

Booleans can be included: they will be displayed as “true” or “false” in the sent e-mail.

“Text area” attributes can be included in the e-mail, but not in the object.

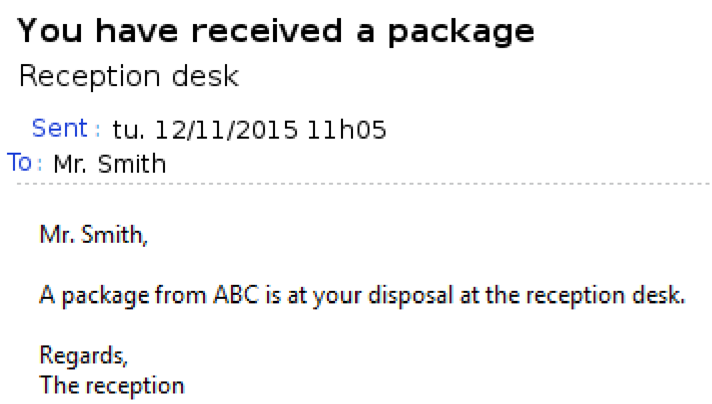
Example

In the framework of a process for the management of mails, the following e-mail template was implemented by a GARGANTUA administrator. It includes two attributes:



A package sent to Mr. Smith by the company ABC is delivered at the reception desk. In GARGANTUA's Web client, a secretary starts the process for the management of mails, and fills a form where he enters "Mr. Smith" in the "Sender" field, and "ABC" in the "Recipient" field.

According to these pieces of information, GARGANTUA sends automatically the following notification to Mr. Smith:



Procedure

To include an attribute in the subject or body of an e-mail template, proceed as follows:

1. Place the cursor where you wish to include the attribute.

2. In the **Forms** section located at the right of the screen, you can reduce the number of available attributes, by checking the form that contains the attribute you want to use.

   If you do not choose any form, all the attributes of the GARGANTUA database will be available.

   If you check the **Select all** checkbox, all the attributes of the GARGANTUA database used in its forms will be available.

3. Click on **Add attribute**.

   The attributes list is displayed.

4. Double-click on the name of the attribute that you want to include.

   You can include the same attribute only once in the subject and only once in the body.

   An attribute marker will be displayed as follows: **${'Name of the attribute'}**. It will be replaced by the attribute value filled by a user, during a process.

It is also possible to add markers, which are, in fact, links to several features: inbox, process, etc.

To add a marker in the e-mail body:

1. Click on **Add a marker**, at the right of the **Message** field.

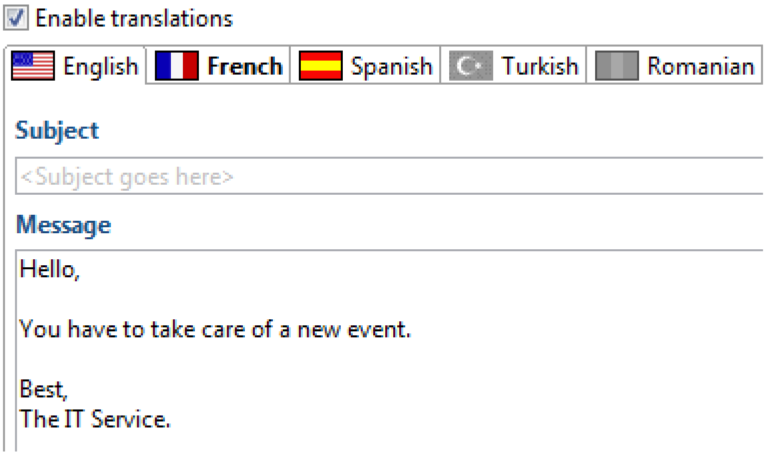
   The markers list is displayed.

2. Double-click on the marker of your choice.

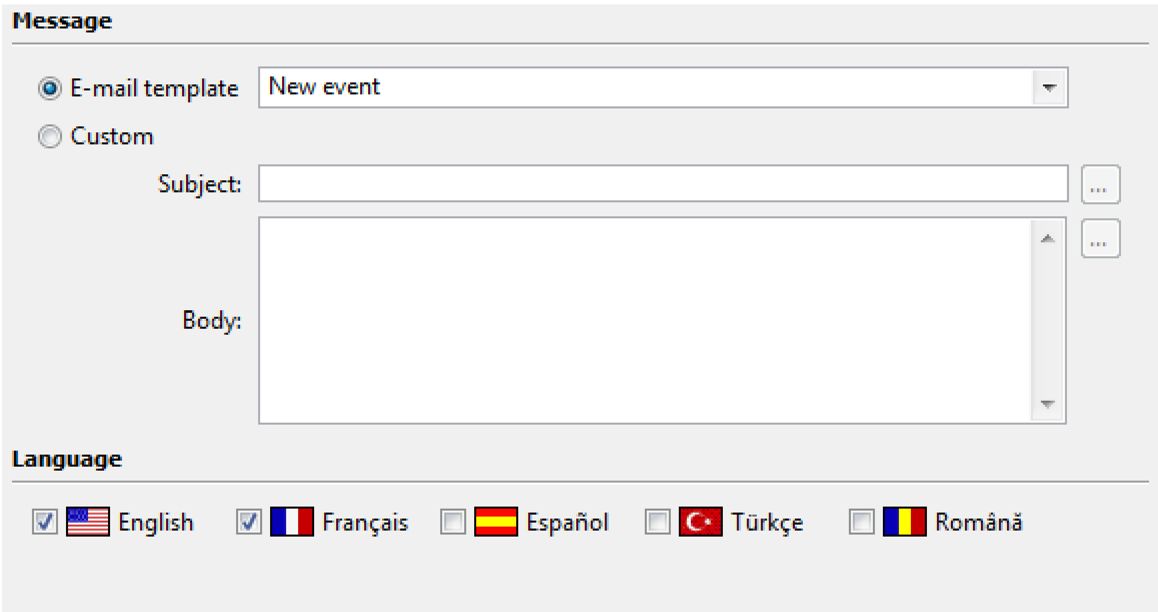
   The marker is now included in the e-mail body.

Managing translations

If you have checked the **Activate translations** checkbox, you can translate the e-mail template into the languages of your choice, with the help of the language tabs that are displayed.



Therefore, when configuring an **E-mail template** task in a process, it will be possible to select the e-mail template that you want to generate in a process, in the **desired language**.



Moreover, you can use the following buttons, located at the right of the message:

- **Copy to all mail content**: allows to copy the e-mail body of the selected language to all other languages.
- **Copy from mail content**: allows to select a language from which to copy the e-mail body to the current language.

-  **Copy to mail content**: allows to select a language to which copy the e-mail body of the current language.

E-mail template management screen - Available tabs

The E-mail templates management screen contains the following tabs:

- The **Properties** tab gathers the main settings of an e-mail template: name, description, and content.
- The **Dependencies** tab allows you to know in which processes an e-mail template is used.
- The **Summary** tab allows you to view a summary of an e-mail template.
- The **Log** tab allows you to view the list of all the operations performed on a view, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

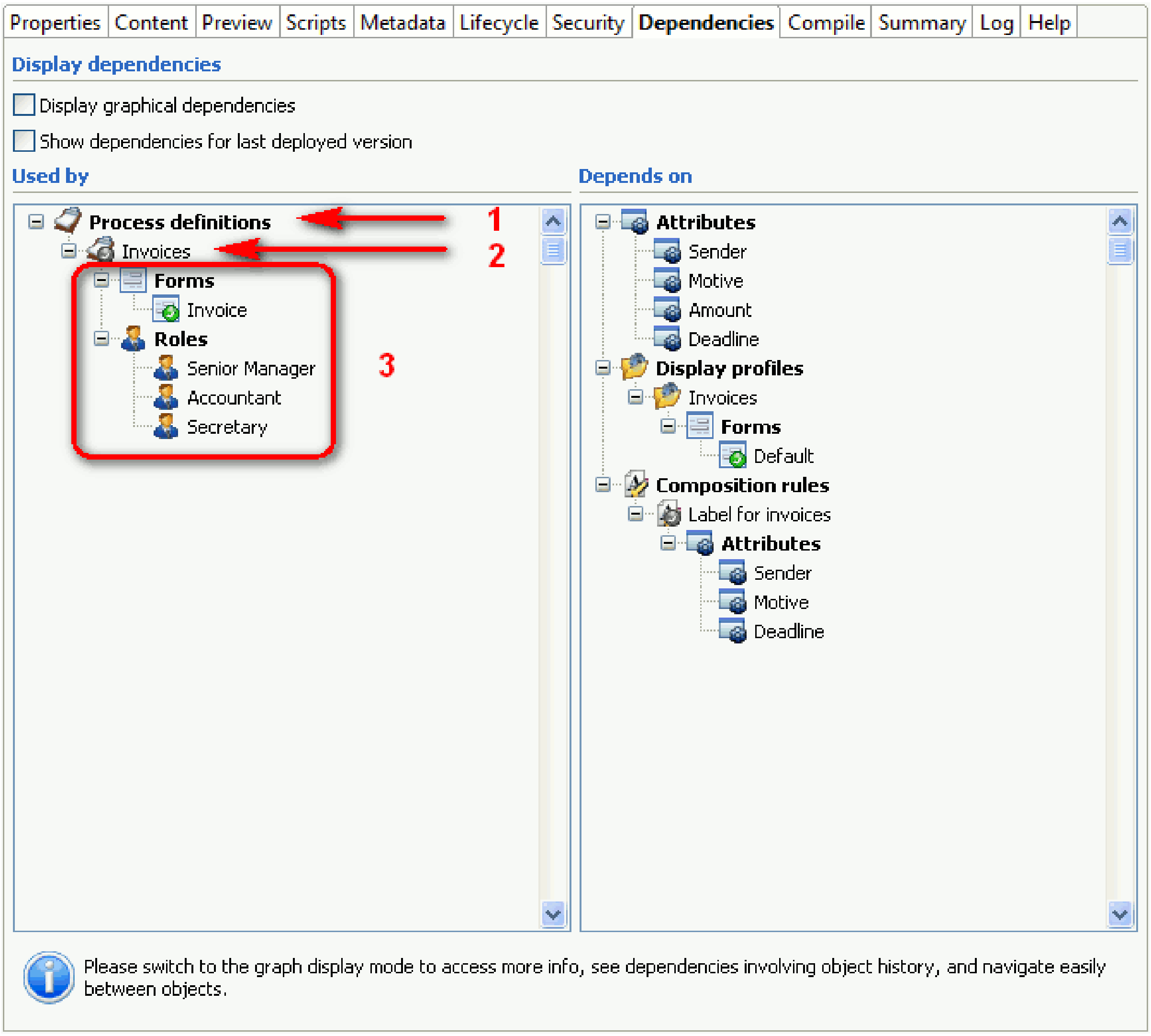
“Dependencies” tab

The **Dependencies** tab allows you to know which other objects rely on or are used by the current design object.

Displaying dependencies in list mode

By default, dependencies are displayed in **list mode** and the **working copies** of the objects are taken into account.

Depending on whether the current object is used by and/or relies on other objects, dependencies are displayed in 1 or 2 columns. If there are 2, the objects that rely on the current object are listed in the left column, and the objects that are used by the current object appear in the right column:



1. Some objects in this category have dependencies to the current object.
2. This object has a dependency to the current object, that is the “Invoices” process uses the “Invoice” form.
3. Here is the list of all objects that have a dependency to the “Invoices” process.

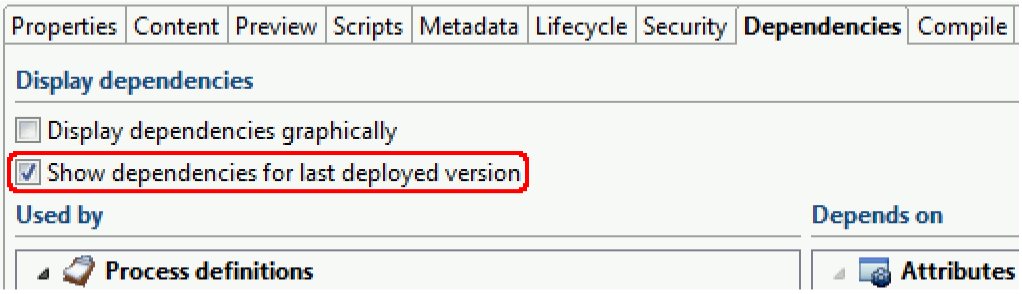
In the dependencies analysis screens as well as everywhere else in the interface, the icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

- No icon - The object is not deployed.
- - The object is deployed and there is no difference between its last deployed version and its working copy.
- - The object is deployed but its last deployed version is not identical to its working copy.

What is the "Show dependencies for last deployed version" option for?

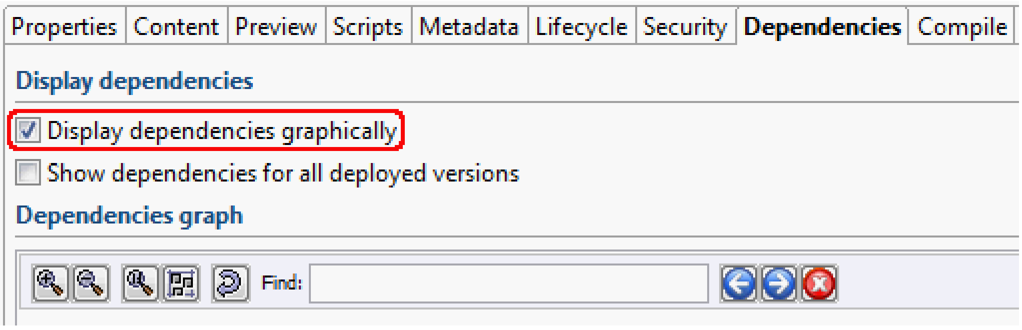
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

This option is only available in list mode, for objects that support the **Deployment history** feature:

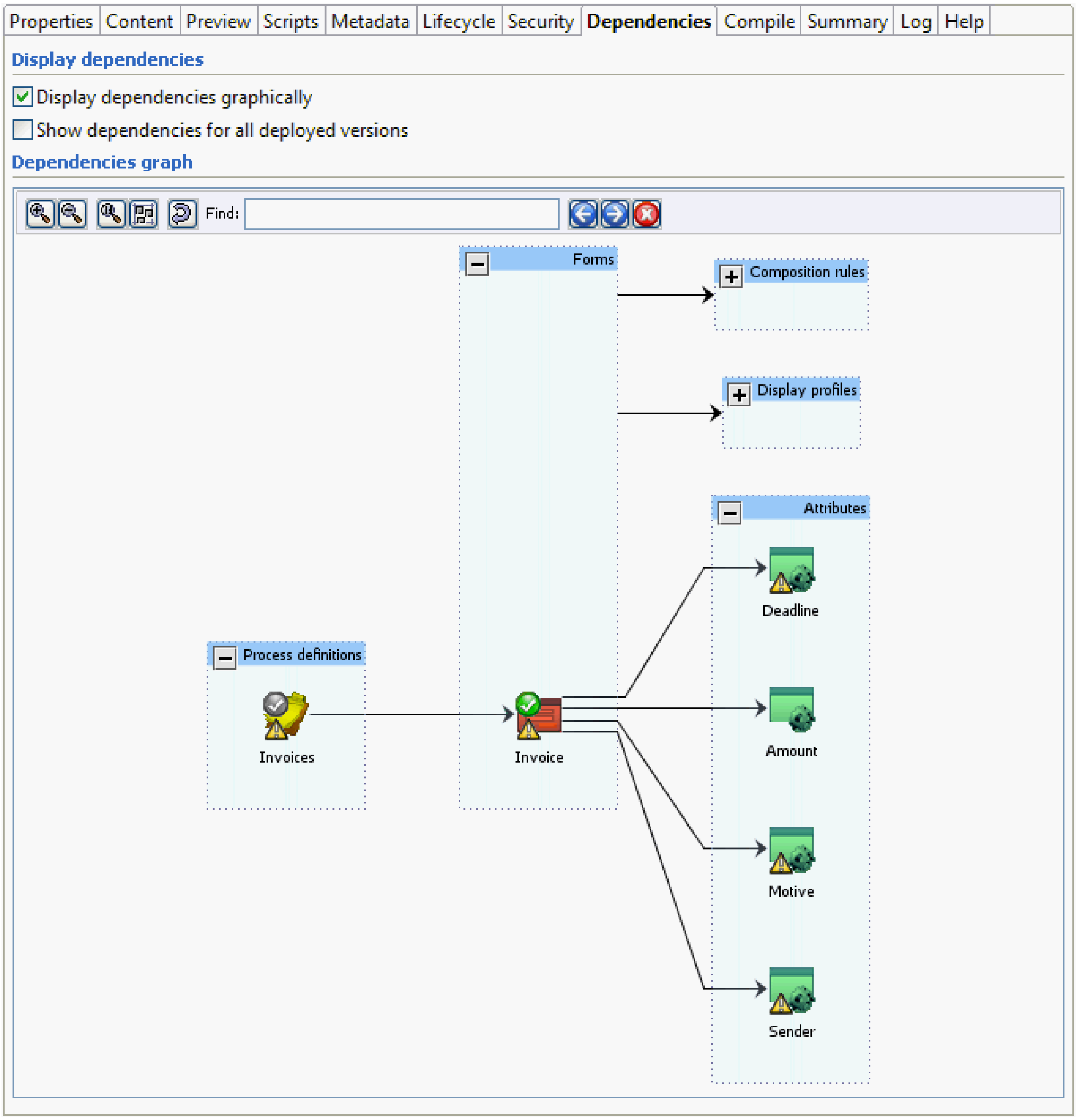


Displaying dependencies graphically

In order to switch from the list mode to the graphical display, check the **Display dependencies graphically** option:



The dependencies between the working copies of the various objects now take the form of a graph:



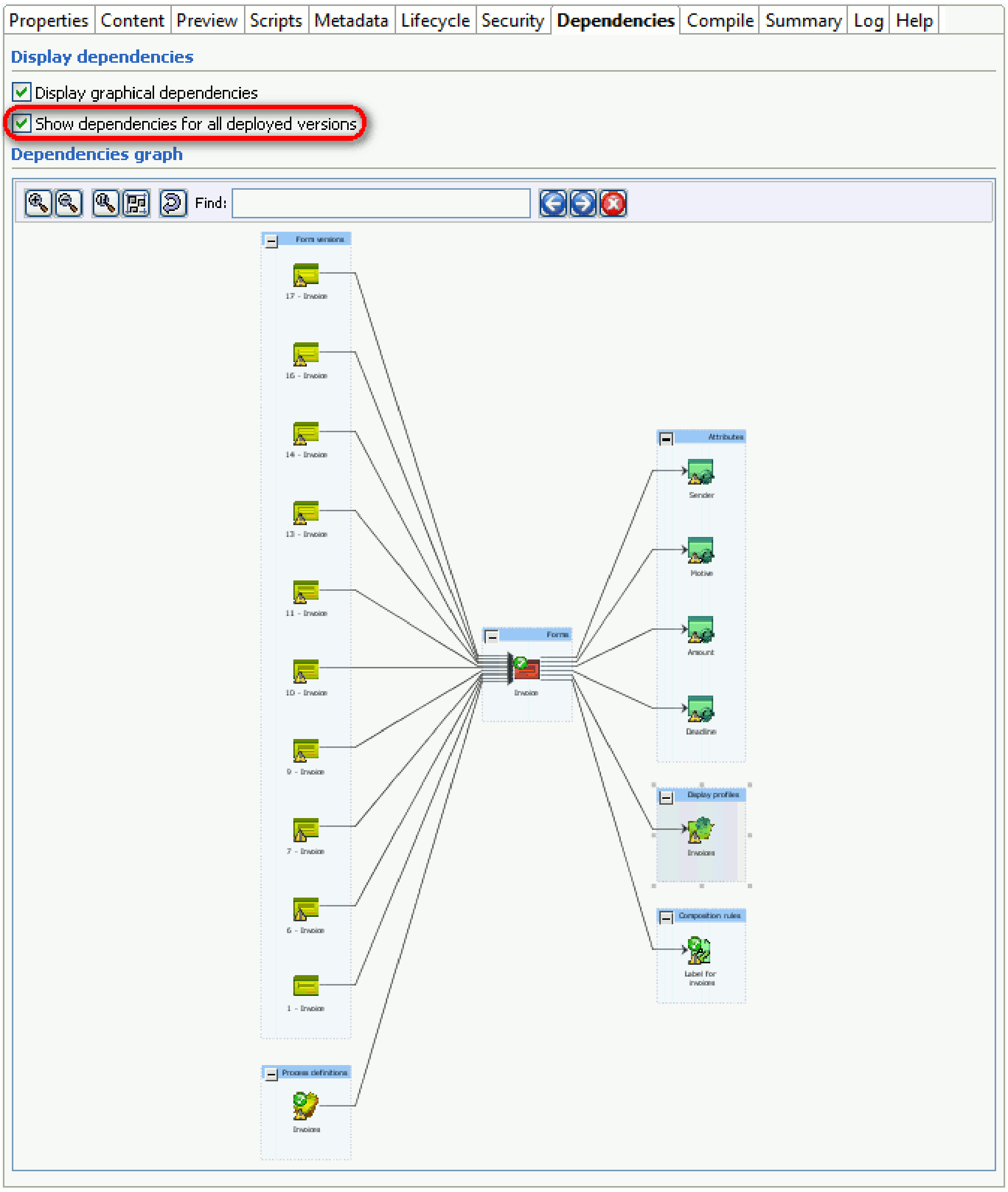
The toolbar above the graph allows you to:

- - Enlarge the graph;
- - Make the graph smaller;
- - Restore the default size for the graph;
- - Optimize the size of the graph;
- - Refresh the graph;
- Find: - Search the names of the objects in the graph for a particular string; the objects that match the search criterion are highlighted in pale blue;
- - - Navigate between the objects that contain the search string;
- - Reset the search results so that no more objects are highlighted.

What is the "Show dependencies for all deployed versions" option for?

If you check the **Show dependencies for all deployed versions** box, the dependencies graph will include all previously deployed versions of the objects, instead of just their working copies. If the current object supports the **Deployment history** function, then the list of all its previously deployed versions will also appear in the graph.

This option is only available when dependencies are displayed graphically:



"Summary" tab

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the Gargantua Administration tool.

"Log" tab

The **Log** tab allows you to view a list of all the operations performed in one of the branches of Gargantua Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits"**, **"Month audits"**, **"Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.

3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

> *You can tick the* ***"Show login/logout events"*** *box to display the users connections and disconnections. This functionality is only available for the* ***"Users"*** *and* ***"Server log"*** *branches.*
>
> *You can tick the* ***"Only Show error audits box"*** *to only display the failed operations.*

> *The* ***"Reset"*** *button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Using an e-mail template in a process task

Once that an e-mail template is created, you can use it in a process task:

1. Make sure you have checked the **For processes** option, in the **Properties** tab of the e-mail template.
2. In the left pane of the Administration Tool, deploy the **Process** sub-branch of the current Gargantua databaase, then deploy the sub-branch corresponding to the process in which you want to use the e-mail template.

   The process management screen is displayed in the right pane.

3. In the **Graph** tab, double-click on the mail task in which you want to use the e-mail template.

   The **Task properties** dialog box opens.

4. In the Message section, click on the arrow of the **E-mail template** field.
5. In the drop-down menu, select the e-mail template you want to use.
6. Click on **OK** to close the dialog box.
7. Click on **Apply**.

   The e-mail template was implemented to the task.

Duplicating an e-mail template

If you want to create two similar e-mail templates, Gargantua offers you the possibility to work on one of them, then duplicate it: you just have to perform the few necessary modifications on the copy.

To duplicate an e-mail template:

1. In the left pane of the Administration Tool, click on the **E-mail template** sub-branch.

   The **Manage e-mail templates** screen displays in the right pane.

2. In the list, click on the template that you want to duplicate.

   The row is highlighted.

3. In the bottom left corner of the right pane, click on the **Duplicate** button.

   A new e-mail template named “xxx **(1)**” displays in the list: you can now rename and modify it as you want.

DELETING AN E-MAIL TEMPLATE

To delete an e-mail template:

1. In the left pane of the Administration Tool, click on the **E-mail template** sub-branch.

   The **Manage e-mail templates** screen displays in the right pane.

2. In the list, click on the template that you want to delete.

   The row is highlighted.

3. In the bottom left corner of the right pane, click on the **Delete** button.

   A warning message is displayed.

4. Click on **Yes**.

   If the e-mail template is not used in any process, it disappears from the tree in the left pane of the Administration Tool: the procedure is over.

   If the e-mail template is used by one or more processes, a warning message is displayed: click on **Yes**. The following message **<Unknown>** now appears in the e-mail task properties of where the e-mail template was used: