



Custom Email Invitation - Developer Guide

Owner: Resultmaker Research & Development
Version: 6.0.0
Revision: 2014-03-24

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Contents

Introduction	3
Step 1: Create a new template	4
Default Templates and Template Location	4
Make a copy and rename it.....	4
Edit the template	5
Step 2 – Create an export definition	7
Make a similar Export Definition.....	7
Replace the value of the InputFile attribute – it should be the name of the template you just created	7
Add or delete mappings	7
Step 3 – Select Export Type	9
Result	10

Introduction

Resultmaker Process Platform comes with a default invitation mail template used for sending email invitations to users, which you want to participate in the workflow in a given role.

The default English invitation email looks like this:

Dear GF{InviteeName}

GF{InvitorName} has initiated the process 'GF{ProjectText}' and hereby invites you to review and approve your part of the electronic process.

Click on the link below to open the process. You will then be guided through the part of the process that requires your approval.

GF{InvitorName} might have entered a password that you will need in order to access your part of the process. If you are not already registered as a user, you must start by registering a user name. You will then be asked for the password. If GF{InvitorName} has not yet given you the password, you can contact him or her at GF{InvitorEmail}.

[GF{ProjectText}](#)

Click on the link above. When the process has been completed, the approved information will be sent to the intended receiver.

Save this e-mail so you can access the process via the link shown above.

If you do not want to approve the process digitally, contact GF{InvitorName} and ask him or her to send you a printed copy of the process by mail. You can contact GF{InvitorName} at GF{InvitorEmail}.

Figure 1: The default invitation email template – English version. GF{} is a definition of some variable from the Workflow, that you want to insert in the email. I.e. GF{InviteeName} is the name of the person invited. The part **GF{InviteeName}** will be replaced with the name, that is entered in the Workflow.

In order to create your own custom email invitation template, you need to:

1. Create a new html template.
2. In the Data Export Definition Tool: Create a corresponding export definition for the template (refers the html template and maps the GF definitions with Workflow Variables (same as Project Variables)).
3. In the Process Designer: On the workflow step "Send invitation" select export type – which should be the new export definition you just created.

Step 1: Create a new template

Default Templates and Template Location

The invitation email templates are located here:

[\\ServerName\c\\$\FileRepository\private\Templates\HtmlServerTemplates](#)

The default templates that comes with the software, and which should NOT be changed are called:

ProjectBuilder_Default_Invitation.htm

ProjectBuilder_Default_Invitation_da.htm

ProjectBuilder_Default_Invitation_en.htm

...

Anything called “ProjectBuilder_Default_...” should NOT be changed.

Make a copy and rename it

Pick a default template – make a copy and rename it.

Instead of using the prefix “ProjectBuilder_Default_” for your custom template – use a meaningful prefix that tells what purpose, customer and workflow the template is being used for.

Example

Custom_Invitation_en.htm

DigitalCitizenService_Invitation_en.htm

Edit the template

```

1  <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
2  <html xmlns:o>
3  <head>
4    <title>Invitation</title>
5  </head>
6  <body>
7    <table width='650' border='0' align='left' cellpadding='0' cellspacing='0' id='Table1'>
8      <tr>
9        <td>
10         <font face='Verdana' size='2'>
11           <p>
12             <br />
13             <strong>Dear GF{InviteeName}</strong>
14             <br />
15             <br />
16             GF{InvitorName} has initiated the process 'GF{ProjectText}' and hereby invites
17             you to review and approve&nbsp;your part of the electronic process.
18             <br />
19             <br />
20             Click on the link below to open the process. You will then be guided through the
21             part of the process that requires your approval.
22           </p>
23           <p>
24           </p>
25           <p>
26             GF{InvitorName} might have entered a password that you will need in order to access
27             your part of the process. If you are not already registered as a user, you must
28             start by registering a user name. You will then be asked for the password. If&nbsp;GF{InvitorName}
29             has not yet given you the password, you&nbsp;can contact him or her at GF{InvitorEmail}.</p>
30           </p>
31           <br />
32           <a href='GF{InvitationLink}'>GF{ProjectText}</a>&nbsp;
33           <br />
34           <br />
35           Click on the link above. When the process has been completed, the approved information
36           will be sent to the intended receiver.</p>
37         </p>
38         <p>
39           Save this e-mail so you can access the process via the link shown above.
40         </p>
41         <p>
42           If you do not&nbsp;want&nbsp;to approve the process digitally, contact GF{InvitorName}&nbsp;and
43           ask him or her to send you a&nbsp;printed copy of the process by mail.&nbsp;You
44           can contact&nbsp;GF{InvitorName} at GF{InvitorEmail}.&nbsp;
45         </p>
46       </font>
47     </td>
48   </tr>
49 </table>
50 </body>
51 </html>

```

Figure 2: The template is an HTML document. Edit - make your own GF{} definitions for variables from the workflow, that you want to insert in the email invitation.

You can make up any GF{} definition as long as it corresponds with some Workflow Variable in the Workflow that is going to use the template.

Make sure the html and the GF{} definitions are well formed and save the template.

In this Example line 21 is changed, where the part “and your dog GF{DogsName}'s” is added.

```

1 <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
2 <html xmlns:o>
3 <head>
4 <title>Invitation</title>
5 </head>
6 <body>
7 <table width='650' border='0' align='left' cellpadding='0' cellspacing='0' id='Table1'>
8 <tr>
9 <td>
10 <font face='Verdana' size='2'>
11 <p>
12 <br />
13 <strong>Dear GF{InviteeName}</strong>
14 <br />
15 <br />
16 GF{InvitorName} has initiated the process 'GF{ProjectText}' and hereby invites
17 you to review and approve&nbsp;your part of the electronic process.
18 <br />
19 <br />
20 Click on the link below to open the process. You will then be guided through the
21 part of the process that requires your and your dog GF{DogsName}'s approval.
22 </p>
23 <p>
24 <p>
25 <p>
26 GF{InvitorName} might have entered a password that you will need in order to access
27 your part of the process. If you are not already registered as a user, you must
28 start by registering a user name. You will then be asked for the password. If&nbsp;GF{InvitorName}
29 has not yet given you the password, you&nbsp;can contact him or her at GF{InvitorEmail}.</p>
30 <p>
31 <br/>
32 <a href='GF{InvitationLink}'>GF{ProjectText}</a>&nbsp;
33 <br/>
34 <br/>
35 Click on the link above. When the process has been completed, the approved information
36 will be sent to the intended receiver.</p>
37 <p>
38 Save this e-mail so you can access the process via the link shown above.
39 </p>
40 <p>
41 If you do not&nbsp;want&nbsp;to approve the process digitally, contact GF{InvitorName}&nbsp;and
42 ask him or her to send you a&nbsp;printed copy of the process by mail.&nbsp;You
43 can contact&nbsp;GF{InvitorName} at GF{InvitorEmail}.&nbsp;
44 </p>
45 </font>
46 </td>
47 </tr>
48 </table>
49 </body>
50 </html>

```

Figure 3: Customized email invitation template - changed line 21 - added the part “and your dog GF{DogsName}'s”

Step 2 – Create an export definition

In the Export Definition Tool create an export definition.



The Export Definition Tool is available in the Start menu of Windows if Process Platform Tools is installed.

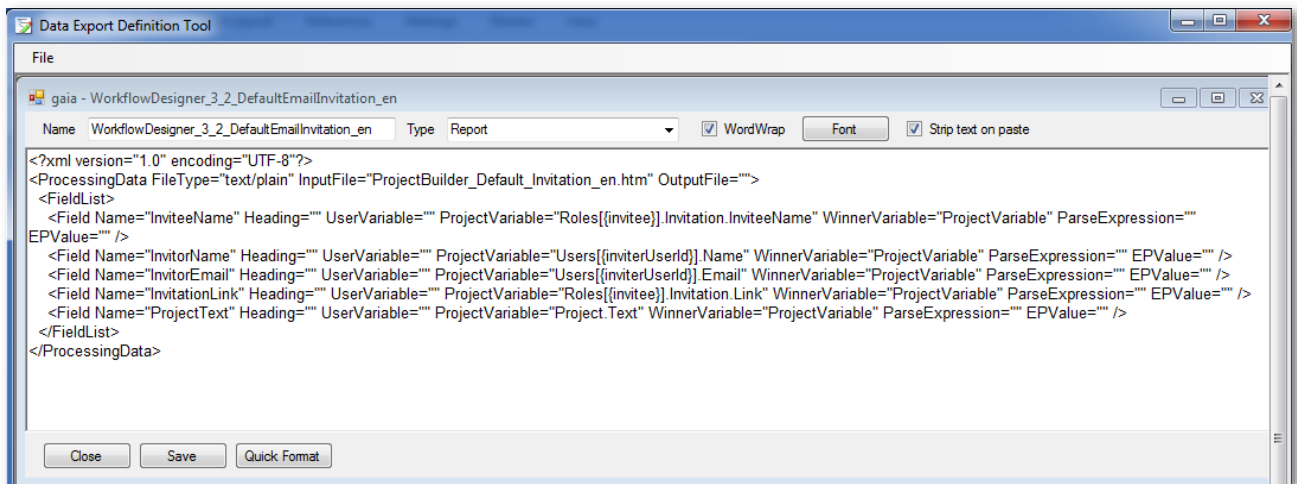


Figure 4: This export definition refers the English default email invitation template and contains the mapping of GF{} definitions and WorkFlow Variables.

Make a similar Export Definition

Give it a meaningful name – i.e. Custom_Email_Invitation_en and set the Type to “Report”.

Replace the value of the InputFile attribute – it should be the name of the template you just created:

```
<ProcessingData FileType="text/plain" InputFile="Custom_Invitation_en.htm" OutputFile="">
```

Add or delete mappings

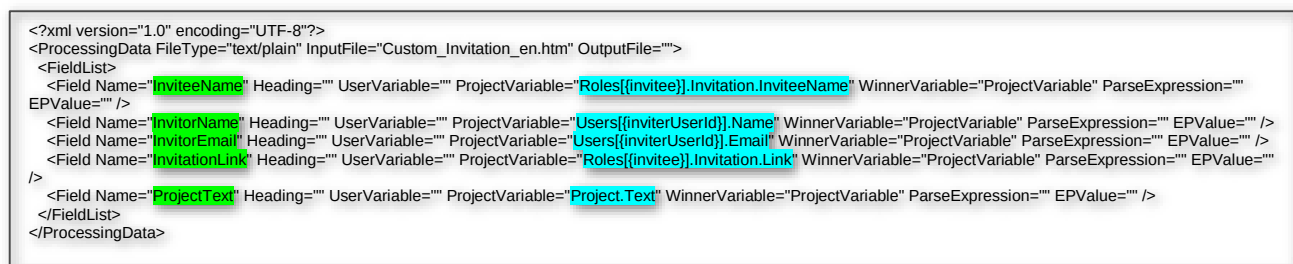
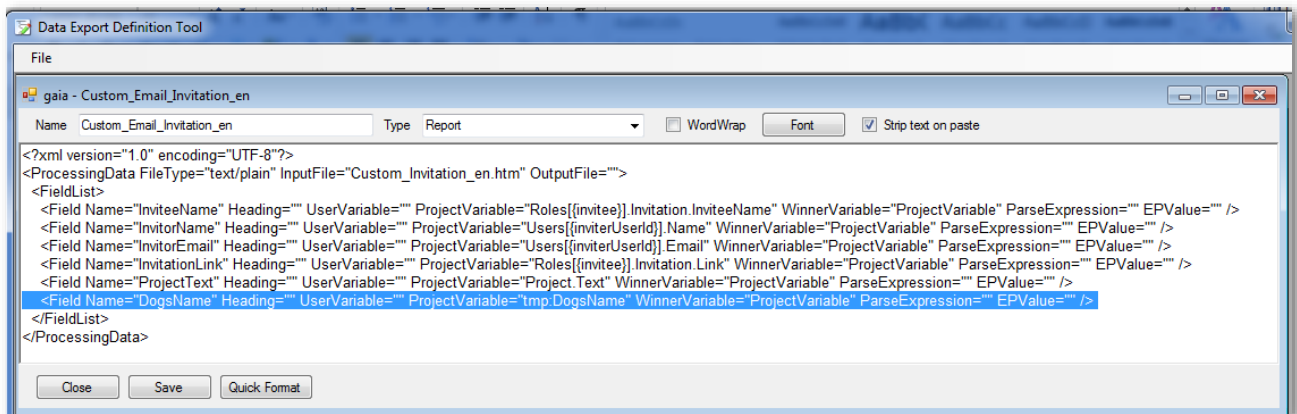


Figure 5: Green parts are GF{} definitions. Blue parts are Variable names

The Export Definition consists of a series of FieldList mappings. The value in the Name attribute of the Field element corresponds to the GF{} definition. The value in the ProjectVariable attribute corresponds to the workflow variable name.



Figur 6: Export Definition for the template Custom_Invitation_en.htm. InputFile value has been changed, and one mapping has been added.

```
<ProcessingData FileType="text/plain" InputFile="Custom_Invitation_en.htm" OutputFile="">
```

```
<Field Name="DogsName" Heading="" UserVariable="" ProjectVariable="tmp:DogsName" WinnerVariable="ProjectVariable" ParseExpression="" EPValue="" />
```

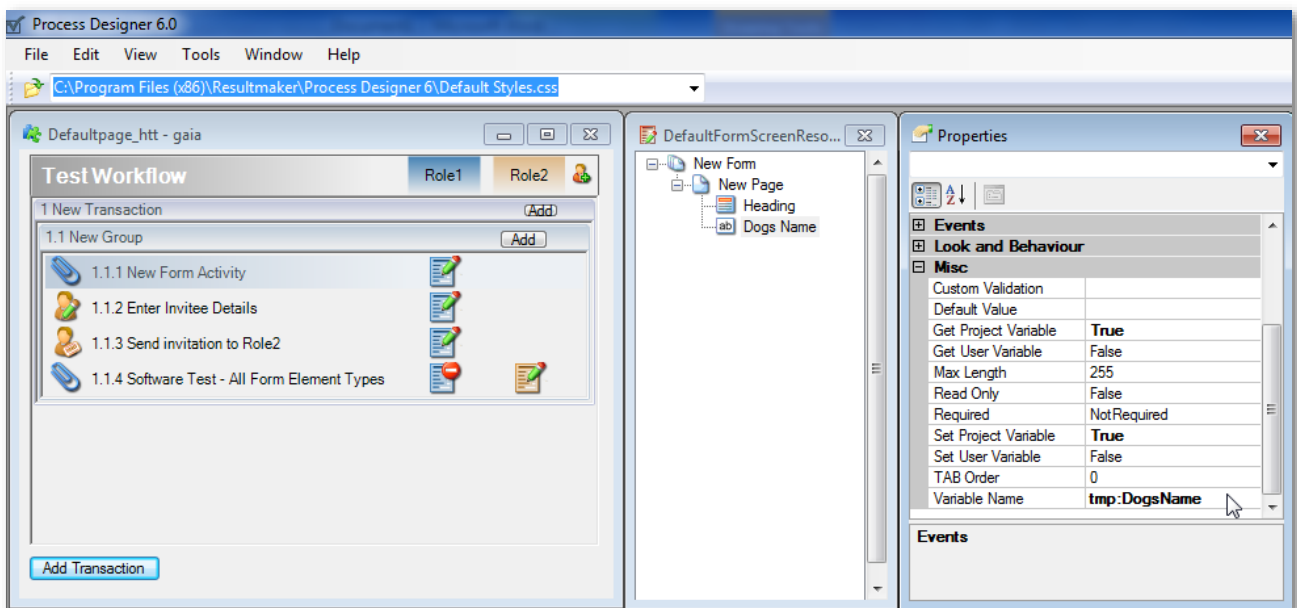
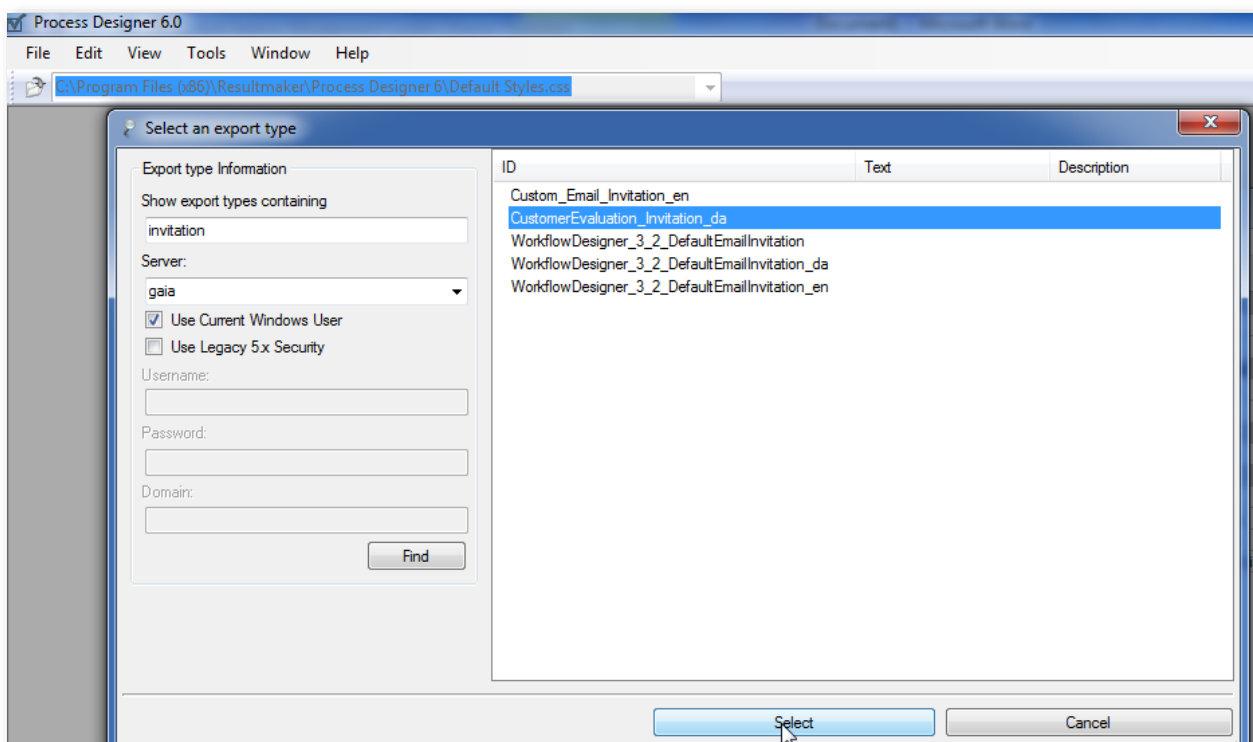
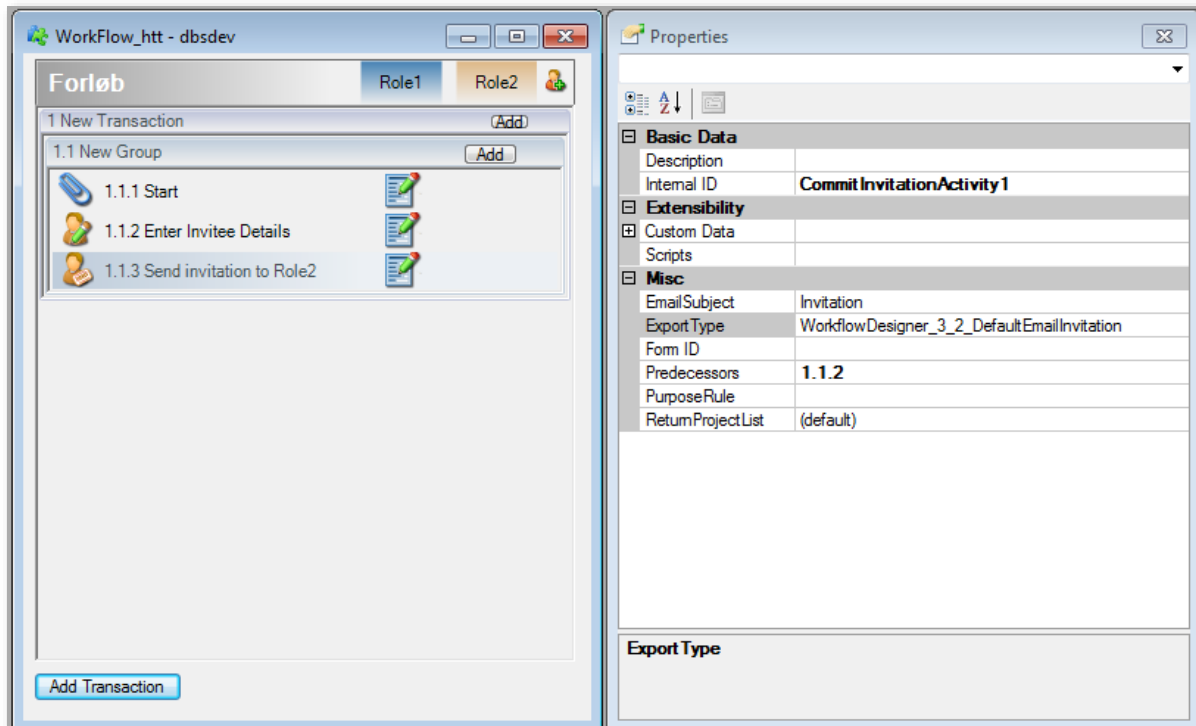


Figure 7: The variable name specified in the ProjectVariable attribute in the mapping is found in properties of the form element

Step 3 – Select Export Type

In the Process Designer: On the workflow step “Send invitation” select export type – which should be the new export definition.



Result

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INNOVATIVE PEOPLE .. DECISIVE TECHNOLOGY

Bruger: ACROPOLIS\htt

Du skal igennem følgende trin:

New Transaction

New Group

✓ **New Form Activity**

Enter Invitee Details

Test Workflow

Du er her: **New Form Activity**

Heading

Dogs Name

Fido

Tilbage

Fortsæt

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INNOVATIVE PEOPLE .. DECISIVE TECHNOLOGY

Bruger: ACROPOLIS\htt

Du skal igennem følgende trin:

New Transaction

New Group

✓ New Form Activity

Enter Invitee Details

Test Workflow

Du er her: **Enter Invitee Details**

This project requires participant 'Role2' to be invited. Here you will provide information about yourself and about the person or company you are inviting, so electronic contact can be established.

Information about you

Name/Company	E-mail
Marketing *	hanne.tt@hotmail.com *

Information about participant 'Role2'

Name	E-mail
Hanne *	htt@resultmaker.com *

Security

To ensure that your invitation is not abused, you must provide a password that the invitee will use to accept the invitation.

Password

Remember to contact the invitee and give him or her this password.

Tilbage

Fortsæt

Invitation

invitation@resultmaker.com

Sent: ti 18-03-2014 14:49

To: Hanne T. Thomsen

Dear Hanne

Marketing has initiated the process 'Test Workflow' and hereby invites you to review and approve your part of the electronic process.

Click on the link below to open the process. You will then be guided through the part of the process that requires your and your dog Fido's approval.

Marketing might have entered a password that you will need in order to access your part of the process. If you are not already registered as a user, you must start by registering a user name. You will then be asked for the password. If Marketing has not yet given you the password, you can contact him or her at hanne.tt@hotmail.com.

[Test Workflow](#)

Click on the link above. When the process has been completed, the approved information will be sent to the intended receiver.

Save this e-mail so you can access the process via the link shown above.

If you do not want to approve the process digitally, contact Marketing and ask him or her to send you a printed copy of the process by mail. You can contact Marketing at hanne.tt@hotmail.com.