



Agylia

CRM → AGYLIA

CPD INTEGRATION WORKFLOWS

<https://github.com/agylia/public-api#create-a-user>

CRM

New member is created on CRM
CRM calls Agylia *SetUser* API to
create the member's record on
Agylia

SetUser

Action=**create**

Username
First name
Surname
Email address
Membership number
Renewal date
Membership grade
Job title
Company
.....

User profile data
example only.
Properties are
configurable per Agylia
instance



Agylia

Member's user record is created using
the supplied user profile properties
and stored in the Agylia user store.

Updating existing members



<https://github.com/agylia/public-api#update-a-user>

CRM

Existing member is updated on CRM. CRM calls Agylia *SetUser* API to update the member's record on Agylia

Any property can be updated. CRM only needs pass the properties that need to be updated.

SetUser

Action=**update**

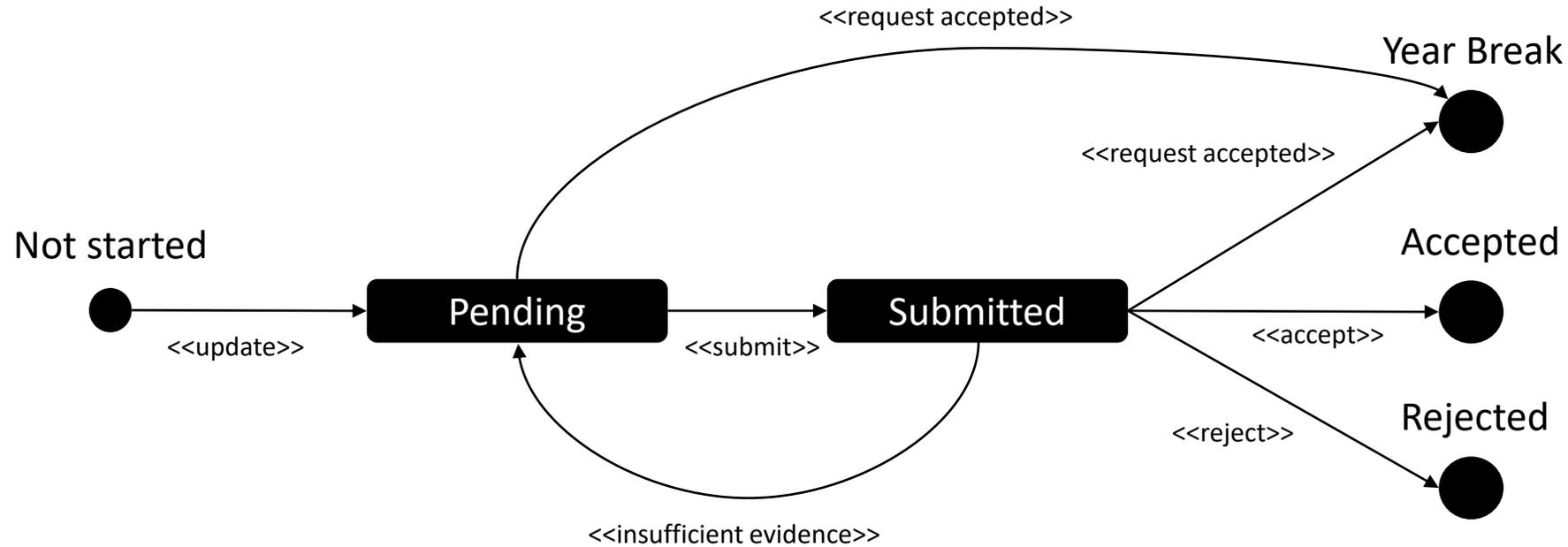
Username
First name
Surname
Email address
Membership number
Renewal date
Membership grade
Job title
Company
.....



Agylia

Member's user record is updated in the Agylia user store, with those user profile properties that have been supplied.

A blank value will clear a property.



Status

Not started
Pending
Submitted
Accepted
Rejected
YearBreak

Display label (example)

Not started
In progress
Submitted
Completed
Insufficient evidence
Year break

Display labels are configurable

Creating a CPD journal



<https://github.com/agylia/public-api#create-a-journal>

CRM

A member's CPD journal needs to be created and initialized.

SetJournal
Action=**create**

User ID
startDate
endDate
target
targetMode ("credits" | "reflections")
submissionDate



Agylia

New CPD journal is created and associated with the member

<https://github.com/agylia/public-api#update-a-journal>

CRM

A member's CPD journal needs to be updated.

Examples:

A year break request is approved, so the member's journal period's status needs updating to "**YearBreak**".

A submission deadline extension request is approved so the extension date needs to be set.

SetJournalPeriod

Action=**update**

User ID)

Extension date = date



Agylia

Member's journal is updated.

A member's submission deadline is reached



<https://github.com/agylia/public-api#update-a-journal>

CRM

Automated process?

When a member's submission deadline is reached and their CPD Is not already in the **"Accepted"** state

SetJournalPeriod

Action=**update**

User ID

Status = "Rejected"

Example only – could be automatically accepted if in the submitted state



Agylia

Member's journal period is updated to **"Rejected"** and is made **read-only**.

Requesting a year break



<https://github.com/agylia/public-api#update-a-journal>

CRM

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Year break is approved

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Email sent to member confirming the year break.

Email sent to member rejecting the year break request.

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SetJournal
Action=update

User ID
Status = "YearBreak"

If the year break request is rejected no changes to the member's CPD journal period are required, so no API interaction here. Member is informed via email sent from CRM.

NOTE: A user profile field can be used to control (at the individual member level) whether the Request year break option should be available on the CPD UI

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Member requests a year break. This results in an email being sent to cpd@company.com (configurable)

Request email includes the following member details automatically placed into the email:

- First name and surname
- Email address
- Membership number
- Reasons for break (prompted for when the member requests the year break)

AGYLIA → CRM

CPD INTEGRATION WORKFLOWS

Updating the status of a CPD record



Note: This requires CRM to expose an API for Agylia to call
Dynamics CRM can use Azure API facilities for this

Agylia

A member's CPD journal status has been updated on Agylia platform.

Examples:

A CPD record is approved, so the member's CPD journal's status needs to be updated to "Accepted".

A CPD Record is not approved, so the Member's journal period's status Needs to be updated to "Rejected".

SetCPDStatus
Action=**update**

See next slide for details

CRM

Member's CPD journal status is updated

Updating the status of a CPD record



SetCPDStatus

Action=**update**

userid = membership number

journal_ref = Agylia journal ref

status =
"Pending" | "Submitted" | "Accepted"
| "Rejected" | "YearBreak"

firstactivitydate = yyyy-mm-dd

POST <https://api.azure-api.net/cpd-in/post>

Header Content:

Host: api.azure-api.net

Content-Type: application/json

Action: update

Api-Version: v1

Ocp-Apim-Subscription-Key: 033f05ee408643258ddfef92cae5c99c

Body Content:

```
{  
  "userid": "123456789",  
  "journal_ref": "0000PM",  
  "status": "Pending",  
  "firstactivitydate": "2019-09-24"  
}
```

- The option to **Submit for review** can become available when certain conditions are met. Examples:
 - I'm only presented with the option to submit my CPD when I have accumulated at least 35 credits (my target)
 - I'm only presented with the option to submit my CPD when I have logged 4 CPD activities that include a reflection statement (my target)

“Submit for review” button availability is controlled via the following two fields in the CPD journal object: **target** and **targetMode**. These need to be set by CRM for each member record.

Target is set to a number while targetMode defines what the number means e.g. “reflections” or “credits”.

The relevant **target** and **targetMode** needs to set within the CPD Journal – by using the CPD Journal API.