EARA Technologies Inc.

MyAlberta Notify - Admin User Guide

for The Government of Alberta
Service Alberta
Digital Service Technologies

Submitted by

EARA Technologies Inc.
IDM Practice
Suite 323
151 Canada Olympic Road SW
Calgary AB T3B 5R5

Date Submitted:
March 25, 2020

CONTACT INFORMATION

Name: Grenville Lock
President
EARA Technologies Inc.
Tel: +1 (403) 398-8615 Ext. 401
Cell: +1 (403) 397-5767

Email: grenville_lock@earatech.com

Contents

MyAlberta Notify - Admin User Guide

How to Register

On the MyAlberta Notify main page, select the **Create an account** button to register for a MyAlberta Notify account.
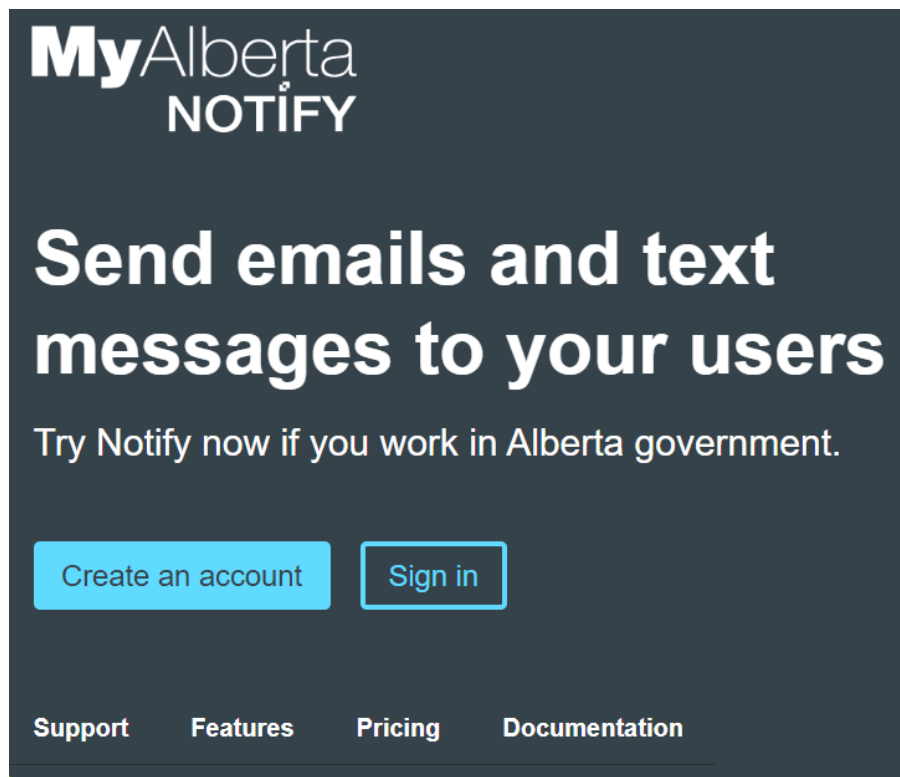
After selecting the **Create an account** button, you are directed to the registration page where you need to fill out the following information register:

Create an account

Full name

[   ]

Email address

Must be from a government organization

[   ]

Mobile number

You'll get a text message with your security code

[   ]

Password

At least 13 characters

[   ]

☐ I consent to being contacted about my experience using MyAlberta
Notify for the purposes of research and product improvement.

[Continue]

In order to register, you need a Government of Alberta email address (@gov.ab.ca).
Email addresses outside of this domain will be rejected by the registration process.
Access to MyAlberta Notify is also restricted to Government of Alberta network access.
A verification email will be sent during the process which will contain a URL. This must
be accessed to complete the registration process.
You are not required to select the consent box about providing feedback to Notify.

Confirm Registration Email

Hi Selenium Registered,

To complete your registration for Notify please click the link below

http://notify.alberta.ca/verify-email/IntclnVzZXJfaWRcljogXCl4M2ExNDFkNS1kYWQxLTQyMWQtODQyMi01

After you have confirmed your registration, a Two Factor Authentication (2FA) code is sent via text message (SMS). Enter that code to complete the registration.

Guided Tutorial

When logging in for the first time, you will be presented with a guided tutorial to create a new service and a template for a text message. The tutorial shows you what information is required for a template and how it is presented to the recipient. When all information has been entered, a message will be sent to the phone number you used to register for MyAlberta Notify.

When the tutorial has finished, select the **Dashboard** link in the dark coloured side bar.

How to login

After the user has successfully registered, they will be an Admin for the services that they create and will have the ability to add team members and set different permissions. For every login after registration, you will be sent an authentication code to your phone. This is the 2FA mentioned above.

Sign in

If you do not have an account, you can [create one now](#).

Email address

[   ]

Password

[   ]

[Continue]

[Forgot your password?](#)

Dashboard

After completing the guided tutorial, you are taken to the Dashboard for the service created in the tutorial. Each service has its own Dashboard. This is used for tracking the messages that are sent and any messages failed.

Dashboard View

Service Example

Dashboard	
Templates	
Team members	
Usage	
Settings	
API integration	

Get started

Add a new template for an email or text message

In the last 7 days

0	0
emails sent	text messages sent
No failures	No failures

See messages sent per month

Selecting the **See message sent per month** link displays the total number of messages that were sent, by month.

Messages sent

	2017 to 2018 fiscal year	2018 to 2019 fiscal year	2019 to 2020 fiscal year
July		0 emails —	0 text messages —
August		0 emails —	0 text messages —

Selecting the **See templates used by month** link displays the templates used by month.

Templates used

2017 to 2018
fiscal year

2018 to 2019
fiscal year

2019 to 2020
fiscal year

July

No messages sent

August

No messages sent

If you have more than one service, select the **Switch Service** link located at the top right of the Dashboard. You are redirected to the Services page.

Back to My First Service

Choose service

My First Service

Add a new service...

The Services page allows you to choose another service or add a new service.

Adding a New Service

To add a new service, select the **Add a new service** link and fill out the form on the About your service page.

About your service

What's your service called?
You can change this later

[   ]

Who runs this service?

◯   Provincial Government

◯   Municipal Government

[Add service]

Once you have named your service, select who runs the service and select **Add service** button to create the service. Please keep in mind when naming your service that recipients will see the name. The Service name is able to be changed in Settings. After the new service has been successfully created, you will be directed to the Dashboard page for that service.

Service Number 2   Switch service

| Dashboard |
| Templates |
| Team members |
| Usage |
| Settings |
| API integration |

Get started

[Write an email or text message]

In the last 7 days

0	**0**
emails sent	text messages sent
No failures	No failures
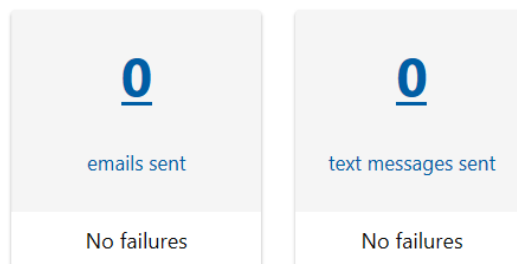
See messages sent per month

When you select the **Write an email or text message** link under the Get Started header, you are directed to the Templates page.
Please note that the Get Started link will only be presented when a new service is created. To create a new template, go to the **Templates** link on the left-hand menu.

Create a New Template

Once on the Templates page you have the option to add a new template for an email or text message.

Service Example

Dashboard
Templates
Team members
Usage
Settings
API integration

Templates

You need a template before you can send emails or text messages

[Add template]

Create an Email Template

To create an email template, select the **Add template** button.

Add a new template

What kind of template do you want to add?

◯ Email

◯ Text message

Continue

Select the Email radio button and the **Continue** button. Fill out the template with the content you want to send out.

Dashboard
Templates
Team members
Usage
Settings
API integration

Add a new email template

Template name
Your recipients won't see this

Subject

Message

Save

Please note: it is important to include the **contact information** for your business area in the template content that you create. It is *not* automatically uploaded or attached to the notification when you send it out. Please include any unsubscribe messages your business area is required to add.

Email Template Formatting Options

You are able to add basic formatting to email templates. Below are the formatting options for an email template. This information is displayed on the Add email template page under the template form.
Currently, there is no capability for HTML or RTF emails.

Formatting	Add to template	How it displays
To put a title in your template, use a hash	# This is a title	**This is a title**
To make bullet points, use asterisks	* Bullet Point One * Bullet Point Two * Bullet Point Three	• Bullet Point One • Bullet Point Two • Bullet Point Three
To add a callout, use a caret	^ You must tell us if your circumstances change	| You must tell us if your circumstances change
To add a link, use full URLs	https://	For more information go to: https://www.examplesite.com/example

You are able to add basic personalization to email templates which allow you to display a recipient's name or a reference number, if applicable. Below are the personalization options for an email template. This information is displayed on the Add email template page under the template form.

Personalization	Add to template	How it displays
Use double brackets to personalize the message	Hello ((first name)), your reference number is ((number))	Hello Jane, your reference number is 00123
Define optional content with double brackets and '??'	((under18??Please get your application signed by a parent or guardian.))	This will only display for those under the age of 18. For each person you send this message to, specify 'yes' or 'no' to show or hide the content.

Once you have completed filling out the form, select the **Save** button. You are then displayed with the template sample and options to send the message or edit the template.

CSRSupport-EmailTemplate

Upload recipients	Send to one recipient	Edit template

From	UAT Behave Testing
To	**Email address**
Subject	Support URL

Hello end user,

Here is the support URL that will help with your issue.

https://www.google.com

Template ID

d7508d3f-7901-4ddd-87e6-361b8ee789c9

Copy template ID to clipboard

Delete template   Hide personalisation after sending

The template ID listed at the bottom of the screenshot is used for API calls.

Send an Email to Multiple Recipients

If you want to send an email to multiple recipients, select the **Upload Recipients** button. You are presented with the upload recipients page.

Service Number 2

Upload recipients

Choose a file

Your file needs to look like this example

Save your file as a CSV, TSV, ODS, or Microsoft Excel spreadsheet

	A
1	email address
2	test@example.com

Download this example

Your file will populate this template (Sample Email Template)

From	Service Number 2
To	email address
Subject	Message from Notify

Hi,

This is a message from Notify.

Dashboard

Templates

Team members

Usage

Settings

API integration

This page allows you to upload a list of recipients as a CSV, ODS or Microsoft Excel Spreadsheet. The file you are uploading must match the example provided on this page. Once you have your file ready, select the **Choose a file** button to upload your list.

Send an Email to one recipient

If you want to send an email to one recipient, select the **Send to one recipient** button. You are presented with the page single recipient page. Enter in the email you wish to send the email to. If you would like to test the email before sending out, select the **Use my email address** link.

Who should this notification be sent to?

email address

[   ]   [Use my email address]

[Continue]

← Back

From	UAT Behave Testing
To	Email address
Subject	Support URL

Hello end user,

Here is the support URL that will help with your issue.

https://www.google.com

Before you send the email, you will be presented with a preview.

Service Number 2

[Switch service]

- Dashboard
- Templates
- Team members
- Usage
- Settings
- API integration

Back

Preview of 'Sample Email Template'

From	Service Number 2
To	earatech.notify@gmail.com
Subject	Message from Notify

Hi,

This is a message from Notify.

[Send 1 email]

After you select the **Send email** button, the email that was sent is displayed along with if it was delivered or not.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

Email

Sample Email Template sent by Andrew Fraser on 8 February at 10:02am

From	Service Number 2
To	earatech.notify@gmail.com
Subject	Message from Notify

Hi,

This is a message from Notify.

Delivered

Once the email has been delivered (or not delivered), the message counts are updated on the Dashboard page. Select the **Dashboard** link in the left-hand menu to view the updated counts.

Create a Text Message (SMS) Template

To create a text message or SMS template, select the **Add a new template** button.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

Add new template

What kind of template do you want to add?

◯ Email

◯ Text message

Continue

Select the Text message radio button and the **Continue** button. Fill out the template with the content you want to send out.

Add a new text message template

Template name
Your recipients won't see this

Message

Save

Please note: it is important to include the **contact information** for your area in the template content that you create. It is *not* automatically uploaded or attached to the notification when you send it out. There is currently no unsubscribe functionality for SMS available at this time.

Text Message Formatting Options

You are able to add some personalization to text message templates. Below are the formatting options for a text message template. This information is displayed on the Add text message template page under the template form.

Personalization	Add to template	How it displays
Use double brackets to personalize the message	Hello ((first name)), your reference number is ((number))	Hello Jane, your reference number is 00123
Define optional content with double brackets and '??'	((under18??Please get your application signed by a parent or guardian.))	This will only display for those under the age of 18. For each person you send this message to, specify 'yes' or 'no' to show or hide the content.
To add a link, use full URLs	https://	For more information go to: https://www.examplesite.com/example

Once you have completed filling out the form, select the **Save** button. You are then displayed with the template sample and options to send the message or edit the template.

CSRSupport-SMSTemplate

Upload recipients   Send to one recipient   Edit template

To: phone number

UAT Behave Testing: Hello end user. Here is the support URL that will help with your issue. https://www.google.com

Template ID

fe97194b-3ffb-4284-94ea-7276c42fa15d

Copy template ID to clipboard

Delete template   Hide personalisation after sending

The template ID listed at the bottom of the screenshot is used for API calls.

Send Text message (SMS) to multiple recipients

If you want to send a text message to multiple recipients, select the **Upload Recipients** button. You are presented with the upload recipients page.

This page allows you to upload a list of recipients as a CSV, ODS or Microsoft Excel Spreadsheet. The file you are uploading must match the example provided on this page. Once you have your file ready, select the **Choose a file** button to upload your list. It is important to note that you can only upload a **maximum** of 5,000 phone numbers per spreadsheet. Any attempt to upload a CSV file with more than 5,000 numbers will not work.

Send an SMS to one recipient

If you want to a send text message to one recipient, select the **Send to one recipient** button. You are presented with the single recipient page. Enter in the phone number

you wish to send the text message to. If you would like to test the text message before sending out, select the **Use my phone number** link.

Who should this notification be sent to?

Phone number

[   ]   Use my Phone number

[Continue]

← Back

To: phone number

UAT Behave Testing: Hello end user. Here is the support URL that will help with your issue. https://www.google.com

Before you send the email, you will be presented with a preview.

Service Number 2

Switch service

Dashboard

Templates

Team members

Usage

Settings

API integration

Back

Preview of 'Text Message Template'

To: 14033975767

Service Number 2: Hi! This is a message from Notify.

[Send 1 text message]

Please note that the Service name will always be included in the text message, this can be changed in the Settings.

After you select the **Send text message** button, the text message that was sent is displayed along with if it was delivered or not.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

Text message

Text Message Template sent by Andrew Fraser on 8 February at 11:05am

To: 14033975767

Service Number 2: Hi! This is a message from
Notify.

Sent internationally

Once the text message has been delivered (or not delivered), the message counts are updated on the Dashboard page. Select the **Dashboard** link in the left-hand menu to view the updated counts.

Team Members

To access the Team Members section, select the **Team members** link on the left-hand side menu.
At the start of a service, the only member listed will be the Admin (you). If you need to add more team members to your service, select the **Invite team member** button.

Service Number 2

Switch service

Dashboard

Templates

Team members

Usage

Settings

API integration

Team members

Invite team member

Andrew Fraser

(you)

✔ Send messages

✔ Add and edit templates

✔ Manage service

✔ Access API keys

Invitation Screen

Enter the email address of the team member to invite and set their permissions. The permissions can be edited after the user has accepted the invite. When completed, select the **Send invitation email** button.

Invite a team member

Email address

[   ]

Permissions

☐ Send messages from existing templates

☐ Add and edit templates

☐ Modify this service and its team

☐ Create and revoke API keys

All team members can see

- templates
- history of sent messages
- who the other team members are

[Send invite email]

Once the invitation is sent, you have the option to cancel the invitation as long as the invitation hasn't been accepted or registered with MyAlberta Notify service. Only whitelisted domains can register (i.e. Government of Alberta email address).

Invitation Sent Notice

Service Number 2

- Dashboard
- Templates
- **Team members**
- Usage
- Settings
- API integration

✔ **Invite sent to thisisfraser@gmail.com**

Team members

Invite team member

Andrew Fraser

(you)

✔ Send messages
✔ Add and edit templates
✔ Manage service
✔ Access API keys

thisisfraser@gmail.com (invited)

Cancel invitation

✔ Send messages
✔ Add and edit templates
✔ Manage service
✔ Access API keys

The invited user will receive a confirmation email. After clicking the URL in the email, the invited user will be presented with the option to sign in or register. Once they have completed either of those options, refresh the Team Members page and you will see that they have accepted the invitation.

Updated Team Members

Service Number 2

Dashboard	
Templates	
Team members	
Usage	
Settings	
API integration	

Team members

[Invite team member]

Andrew Fraser

(you)

✔ Send messages

✔ Add and edit templates

✔ Manage service

✔ Access API keys

Andrew Fraser

thisisfraser@gmail.com

Edit permissions

✔ Send messages

✔ Add and edit templates

✔ Manage service

✔ Access API keys

Editing Permissions

To edit team member permissions, select the **Edit Permissions** link to the right of the Team Member email address.

Service Number 2

Dashboard	**Andrew Fraser**
Templates	thisisfraser@gmail.com
Team members	**Permissions**
Usage	☑ Send messages from existing templates
Settings	☑ Add and edit templates
API integration	☑ Modify this service and its team
	☑ Create and revoke API keys

All team members can see

- templates
- history of sent messages
- who the other team members are

Save   Remove user from service

Select the **Save** button when finished. You will see a greyed-out X to the left of the removed permissions.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

Team members

Invite team member

Andrew Fraser

(you)

✔ Send messages

✔ Add and edit templates

✔ Manage service

✔ Access API keys

Andrew Fraser

thisisfraser@gmail.com

Edit permissions

✔ Send messages

✖ Add and edit templates

✖ Manage service

✖ Access API keys

Removing a Team Member

To remove a team member, select **the Edit Permissions** link to the right of the team member email address. Select the **Remove user from service** link next to the save button.

Service Number 2

- Dashboard
- Templates
- **Team members**
- Usage
- Settings
- API integration

Andrew Fraser

thisisfraser@gmail.com

Permissions

- ✔ Send messages from existing templates
- ☐ Add and edit templates
- ☐ Modify this service and its team
- ☐ Create and revoke API keys

All team members can see

- templates
- history of sent messages
- who the other team members are

Save   Remove user from service

Select the **Yes, remove** button on the warning message to confirm the removal.

Service Number 2

- Dashboard
- Templates
- **Team members**
- Usage
- Settings
- API integration

Are you sure you want to remove Andrew Fraser?

Yes, remove

Andrew Fraser

thisisfraser@gmail.com

Permissions

- ☑ Send messages from existing templates
- ☐ Add and edit templates
- ☐ Modify this service and its team
- ☐ Create and revoke API keys

Once team member is successfully removed, the updated Team members page is displayed.

Service Number 2

- Dashboard
- Templates
- **Team members**
- Usage
- Settings
- API integration

Team members

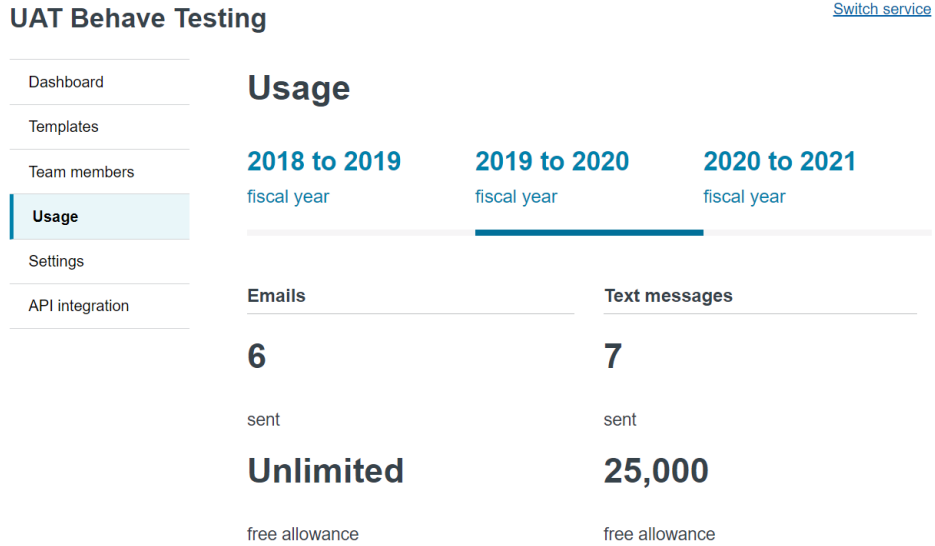Invite team member

Andrew Fraser

(you)

- ✔ Send messages
- ✔ Add and edit templates
- ✔ Manage service
- ✔ Access API keys

If the removed team member was still signed into the service, they will receive an error page when trying to access.

Usage

The Usage section contains a simple dashboard that lists the number of messages that have been sent for both email and text messages.

UAT Behave Testing

Switch service

- Dashboard
- Templates
- Team members
- **Usage**
- Settings
- API integration

Usage

2018 to 2019
fiscal year

2019 to 2020
fiscal year

2020 to 2021
fiscal year

Emails

6

sent

Unlimited

free allowance

Text messages

7

sent

25,000

free allowance

Unlike the main Dashboard section, this does not list the failed messages count. Number of messages can be changed and is done through the API.

31

Settings

To access the Settings, select the **Settings** link on the left has side menu.

Service Number 2   Switch service

- Dashboard
- Templates
- Team members
- Usage
- **Settings**
- API integration

Settings

General

Service name	Service Number 2	Change
Sign-in method	Text message code	Change

Email

Send emails	On	Change
Email reply to addresses	Not set	Change

Text messages

Send text messages	On	Change
Text message sender	stage	Manage
Text messages start with service name	On	Change
International text messages	On	Change
Receive text messages	Off	Change

On this page, you are able to change the service name, set an email address all replies to notifications will be sent too. For Text message, you can choose to display the sender of the messages and service name in messages sent.
The rest of the setting items not explained are not easily configured.

API Integration

To access the API integration page, select the **API integration** link on the left-hand menu. On the API Integration page, you have the options to create API keys, whitelist emails and look at Callbacks.

Service Number 2

Dashboard
Templates
Team members
Usage
Settings
API integration

API integration

| API keys | Whitelist | Callbacks |

Message log   Refresh

When you send messages via the API they'll appear here.

Notify deletes messages after 7 days.

Create API Keys

To create API keys, select **API Keys** button.

Service Number 2

Dashboard
Templates
Team members
Usage
Settings
API integration

API keys   Create an API key

You haven't created any API keys yet

← Back to API integration

Select the **Create an API key** button to open the API key form.

Fill in the Name for this key field and select an option from the list.

Create an API key

Name for this key

[   ]

Type of key

◯   Live – sends to anyone

◯   Team and whitelist – limits who you can send to

◯   Test – pretends to send messages

[Continue]

Once you have a live service, the top radio button is available to use.

Once the API key is created, it will be displayed on the New API key page.

Service Number 2   Switch service

| Dashboard |
| Templates |
| Team members |
| Usage |
| Settings |
| **API integration** |

New API key

Copy your key to somewhere safe. You won't be able to see it again once you leave this page.

API key

andrew_api_key-0633fbc3-1195-477f-bc35-f17c7ec93246-6fb74788-7899-42b1-85e2-c93c9a83ba4a

[Copy API key to clipboard]

Back to API keys

34

To copy the API key, select the **Copy API key to clipboard** button. This will allow you to copy the key to where you want to input it. If you forget to copy the key, or select Back to API keys link before copying, you will need to create a new API key. When you leave this page, the API key becomes unavailable.
It is recommended that you revoke the previous API key before you create a new one. See next section for revoking an API key.

Revoke API Key

If you no longer require an API key, or failed to copy the previous API key, you can revoke the API key from the API Integration page by selecting the **Revoke** link to the right of the API key.

Select the **Confirm** button on the warning message to revoke the API key.

A confirmation message indicating that the key was revoked is displayed. Next to the revoked API key name, you will also see the date and time that the key was revoked.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

✔ **'Andrew API Key' was revoked**

API keys

Create an API key

Andrew API Key
Team and whitelist – limits who you can send to

Revoked 11 February at 5:47am

← Back to API integration

Whitelist

After clicking on the Whitelist button, you will be presented with the following screen.

Service Number 2

- Dashboard
- Templates
- Team members
- Usage
- Settings
- **API integration**

Whitelist

You and members of your team are included in the whitelist automatically.

Email addresses

1.

2.   Remove

Add another email address (3 remaining)

Mobile numbers

1.

2.   Remove

Add another phone number (3 remaining)

Save

← Back to API integration

You can select up to 5 email addresses and 5 text messages to be on the whitelist. You and members of your team are automatically included in this whitelist list.

Callback URL

After clicking the **Callback URL** button, you will be presented with the following screen.

Service Number 2

Dashboard

Templates

Team members

Usage

Settings

API integration

Callbacks for delivery receipts

When you send an email or text message, we can tell you if Notify was able to deliver it. Check the callback documentation for more information.

URL
Must start with https://

Bearer token
At least 10 characters

Save

← Back to settings

The URL that is specified will be the place Notify tells you if the message had been delivered or not.

How to terminate your account as an Admin

Removing your admin account needs to be done by a Platform Admin. Please see the MyAlberta Notify Platform Admin Guide for more information.