

PMTNM Workflow Management System - Public Documentation

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Overview

The Professional Music Teachers of New Mexico (PMTNM) Workflow Management System is a comprehensive communication and request tracking system designed to ensure all member inquiries, requests, and communications are properly routed, logged, and resolved. This system provides transparency, accountability, and efficient handling of organizational requests.

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System Overview

The workflow system ensures that:

- **All communications are logged** - Every message and action is recorded for auditability
- **Requests reach the right person** - Automated routing based on request type
- **Responses are tracked** - System-enforced responses ensure nothing falls through the cracks
- **Transparency is maintained** - Originators can track the status of their requests
- **Accountability is enforced** - All actions are logged with timestamps and actor information

Key Principles

1. **System-Based Communication:** All responses must go through the system (not direct email replies) to ensure proper logging
2. **Clear Expectations:** Each workflow type has defined deadlines and expected actions
3. **Confirmation Required:** Originators must confirm when requests are fulfilled
4. **Audit Trail:** Complete history of all actions is maintained

Available Workflows

1. Financial Records Access Request

Purpose: Allows members to request access to financial records per PMTNM handbook requirements.

Who Can Use: Logged-in members only

Recipient: Executive Secretary-Treasurer

Response Deadline: 14 days

Required Information:

- Your name and email
- Selection of requested documents (checkboxes):
 - Financial ledger/register
 - Checkbook/transaction records
 - Receipts and vouchers
 - CPA reports
 - Budget documents
 - Other (specify in message)

- Your message explaining the request

Handbook Reference: "Financial records shall be open to any member at all times"

2. Membership Inquiry

Purpose: For general membership questions, applications, and membership-related requests.

Who Can Use: Anyone (public or member)

Recipient: System Administrator

Response Deadline: 7 days

Required Information:

- Your name and email
- Your message/question

Handbook Reference: Membership inquiries and applications

3. Get Involved - Volunteer Interest

Purpose: For individuals who want to volunteer or get involved with PMTNM activities.

Who Can Use: Anyone (public or member)

Recipient: President

Response Deadline: 14 days

Required Information:

- Your name and email
- Your message describing your interest

Handbook Reference: Volunteer opportunities and committee participation

How to Submit a Request

Step 1: Access the Contact Form

Navigate to the [Contact Us page](#) on the PMTNM website.

Step 2: Fill Out the Form

1. **Enter your name and email address**
2. **Select a subject** from the dropdown:
 - Financial Records Access Request (requires login)
 - Membership Inquiry
 - Get Involved - Volunteer Interest
3. **Complete workflow-specific fields** (if applicable):
 - For Financial Access: Select which documents you need
 - For other workflows: Just provide your message
4. **Write your message** explaining your request
5. **Complete the verification question** (anti-spam)
6. **Click "Send Message"**

Step 3: Confirmation

After submission, you will receive:

- A confirmation message on the website
- An email notification (in production) with your ticket ID
- Access to view your ticket status

Important Notes

- **Financial Access Requests:** You must be logged in to submit. If you're not logged in, you'll see a warning message and the submit button will be disabled.
- **All submissions create a workflow ticket** - This ensures your request is tracked and responded to
- **Ticket IDs are unique** - Save your ticket ID for reference

Understanding Ticket Status

Tickets progress through several statuses:

Status Definitions

1. **Pending Response** (pending_response)

- Ticket has been created and sent to the recipient
- Waiting for the recipient to take action
- Within the response deadline

2. **Responded** (responded)

- Recipient has sent a message response
- Waiting for originator to review and confirm resolution

3. **Fulfilled Pending Confirmation** (fulfilled_pending_confirmation)

- Recipient has marked the request as fulfilled
- Waiting for originator to confirm if the request is resolved
- Originator can mark as "Resolved" or "Still Not Resolved"

4. **Resolved** (resolved)

- Originator has confirmed the request is satisfied
- Ticket is complete

5. **Unresolved** (unresolved)

- Originator has indicated the request is not yet satisfied
- Ticket remains open for further action

Status Timeline

Created → Pending Response → [Responded OR Fulfilled] → Resolved/Unresolved

For Request Recipients

If you receive a workflow request email, here's what you need to know:

Receiving a Request

When you receive a workflow request:

1. **You'll receive an email** with:

- Ticket ID
- Request details
- Response deadline
- Action buttons

2. **Important:** Do NOT reply directly to the email. Use the buttons in the email or the system interface.

Taking Action

You have two main options:

Option 1: Mark as Fulfilled

If you have completed the request:

1. Click "✓ I have fulfilled this request" (in email or system)
2. Optionally add fulfillment notes
3. Submit

The originator will be notified and asked to confirm.

Option 2: Respond with Message

If you need to communicate or ask questions:

1. Click "✉ Respond with Message" (in email or system)
2. Enter your response message
3. Submit

The originator will receive your response and can mark the ticket as resolved or unresolved.

Resending Confirmation Requests

If a ticket is in "Fulfilled Pending Confirmation" status and the originator hasn't responded:

1. You'll see a "Resend Confirmation Request" button
2. Click it to send a reminder email to the originator
3. This helps ensure requests don't get forgotten

Response Deadlines

- **Financial Access Requests:** 14 days
- **Membership Inquiries:** 7 days
- **Volunteer Interest:** 14 days

Deadlines are calculated from the ticket creation date.

For Request Originators

Viewing Your Tickets

You can view all your tickets in several ways:

1. **Home Page Dashboard** (if logged in)
 - Shows tickets assigned to you and submitted by you
 - Located at the top of the home page
2. **My Requests Page**
 - Visit `/workflow/my_requests.php`
 - Shows all tickets where you are the originator or recipient
 - Filter by status (All, Pending, Fulfilled, Resolved, Unresolved)
3. **Email Links**
 - All notification emails include links to view ticket details

When Your Request is Fulfilled

When a recipient marks your request as fulfilled:

1. **You'll receive an email notification** with:

- Fulfillment details
- Fulfillment notes (if provided)
- Action buttons

2. **Review what was provided**

3. **Take action:**

- **Mark as Resolved:** If your request is satisfied
- **Still Not Resolved:** If you need more or something is missing (you'll need to provide a reason)

When You Receive a Response

If the recipient sends a message response:

1. **You'll receive an email** with the response text

2. **Review the response**

3. **Take action:**

- **Mark as Resolved:** If the response answers your question
- **Still Not Resolved:** If you need follow-up

Confirmation Reminders

If you receive a reminder email:

- This means your request was marked as fulfilled but you haven't confirmed yet
- Please review and mark as resolved or unresolved
- If you've already confirmed, you can ignore the reminder

System Features

1. **Secure Token-Based Access**

- All action links use secure, time-limited tokens

- Tokens expire after 48 hours for security
- Each token is specific to the ticket, email, and action

2. Email Notifications

In Development (localhost):

- Emails are displayed in the browser
- Logged to `logs/localhost_emails/` directory
- Not actually sent

In Production:

- Emails are sent via SMTP
- All recipients (TO, CC) receive notifications
- Originator is automatically CC'd on initial requests

3. Complete Audit Trail

Every action is logged with:

- Timestamp
- Actor (who performed the action)
- Action type
- Ticket ID
- Request ID (for correlation)

Logs are stored in:

- `data/workflows/active_tickets.json` - Current tickets
- `data/workflows/ticket_history.jsonl` - Immutable event log

4. Status Tracking

- Visual status indicators
- Progress tracking
- Deadline monitoring
- Timeline of events

5. Multi-User Support

- Users can be both originators and recipients
- Tickets show whether you "submitted", "are assigned", or both
- Separate views for submitted vs. assigned tickets

6. Admin Dashboard

Administrators can:

- View all tickets
 - Filter by status, workflow type, date
 - See progress bars and timelines
 - Monitor deadlines
 - Track fulfillment and resolution rates
-

Security and Privacy

Email Normalization

- All email addresses are normalized (lowercase, trimmed) for consistent matching
- Prevents issues with case sensitivity or whitespace

Token Security

- Tokens use HMAC-SHA256 for cryptographic security
- Tokens are action-specific (respond, fulfill, view)
- Tokens expire after 48 hours
- Token secret is stored securely (environment variable in production)

Access Control

- Financial Access Requests require login
- Ticket viewing requires:
 - Being the originator (logged in), OR
 - Being the recipient with a valid token, OR

- Having a valid view token from email

Data Storage

- Tickets stored in JSON format
- Event logs in JSONL (append-only) format
- Atomic file writes prevent data corruption
- All data is sanitized before storage

Privacy

- Only authorized personnel can view tickets
- Email addresses are used for routing and notifications
- All actions are logged for auditability
- No personal information is shared publicly

Technical Architecture

Core Components

1. **WorkflowManager** (`includes/WorkflowManager.php`)

Purpose: Core ticket management and data persistence

Key Methods:

- `createTicket()` - Create a new workflow ticket
- `getTicket()` - Retrieve a ticket by ID
- `addResponse()` - Add a message to the ticket thread
- `markFulfilled()` - Mark ticket as fulfilled by recipient
- `markResolved()` - Mark ticket as resolved by originator
- `markUnresolved()` - Mark ticket as unresolved
- `getUserTickets()` - Get tickets where user is originator
- `getRecipientTickets()` - Get tickets where user is recipient
- `updateEmailChain()` - Track email notifications

Data Storage:

- Active tickets: `data/workflows/active_tickets.json`
 - Event history: `data/workflows/ticket_history.jsonl`
-

2. WorkflowRouter (`includes/WorkflowRouter.php`)

Purpose: Email routing, token generation, and notifications

Key Methods:

- `routeTicket()` - Route a ticket to its recipient
- `sendTicketNotification()` - Send email notifications
- `generateToken()` - Create secure access tokens
- `validateToken()` - Validate token authenticity
- `generateInitialRequestEmail()` - Create initial request email
- `generateFulfillmentNotificationEmail()` - Create fulfillment notification
- `generateResponseNotificationEmail()` - Create response notification
- `generateConfirmationReminderEmail()` - Create confirmation reminder
- `isLocalhost()` - Detect development environment

Notification Types:

- `initial_request` - New ticket notification to recipient
- `fulfillment_notification` - Fulfillment notification to originator
- `response_notification` - Response notification to originator
- `confirmation_reminder` - Reminder to originator to confirm

Token Actions:

- `respond` - Allow recipient to respond with message
 - `fulfill` - Allow recipient to mark as fulfilled
 - `view` - Allow viewing ticket details
-

3. WorkflowTemplates (`includes/WorkflowTemplates.php`)

Purpose: Workflow configuration and validation

Key Methods:

- `loadConfig()` - Load workflow configuration from JSON
- `getWorkflow()` - Get workflow definition by type
- `getAllWorkflows()` - Get all workflow definitions
- `workflowExists()` - Check if workflow type exists
- `getRecipientRouting()` - Get email routing for workflow
- `getRequiredFields()` - Get required fields for workflow
- `getResponseDeadline()` - Get deadline in days
- `getHandbookReference()` - Get handbook reference text
- `validateWorkflowData()` - Validate submitted data

Configuration File:

- `data/workflows/workflows_config.json`
-

User Interface Pages

1. Contact Form (`contact.php`)

- Entry point for all workflow requests
- Dynamic form fields based on workflow type
- Login requirement enforcement for financial access
- Client-side validation

2. Respond Page (`workflow/respond.php`)

- Interface for recipients to take action
- Token-based access
- Options to fulfill or respond
- Resend confirmation request feature
- Message thread display

3. View Ticket (`workflow/view_ticket.php`)

- View ticket details and full thread
- Resolution interface for originators

- Status indicators

- Timeline display

4. My Requests (`workflow/my_requests.php`)

- User dashboard for all their tickets
- Shows both submitted and assigned tickets
- Status filtering
- Quick action links

5. Admin Dashboard (`workflow/admin/workflow_admin.php`)

- Administrative overview of all tickets
- Progress tracking
- Deadline monitoring
- Filtering and search capabilities

Data Flow

1. User submits contact form
↓
2. `process_contact.php` validates and creates ticket
↓
3. `WorkflowManager.createTicket()` creates ticket record
↓
4. `WorkflowRouter.routeTicket()` determines recipient
↓
5. `WorkflowRouter.sendTicketNotification()` sends email
↓
6. Recipient clicks link in email (token-based)
↓
7. Recipient takes action (fulfill or respond)
↓
8. `WorkflowManager` updates ticket status
↓
9. `WorkflowRouter` sends notification to originator
↓
10. Originator confirms resolution
↓

File Structure

```

/
├── contact.php                # Contact form (entry point)
├── process_contact.php       # Form submission handler
├── includes/
│   ├── WorkflowManager.php  # Core ticket management
│   ├── WorkflowRouter.php   # Email routing & notifications
│   └── WorkflowTemplates.php # Workflow configuration
├── workflow/
│   ├── respond.php          # Recipient action interface
│   ├── view_ticket.php      # Ticket viewing & resolution
│   ├── my_requests.php      # User dashboard
│   ├── header.php           # Workflow page header
│   ├── footer.php           # Workflow page footer
│   └── admin/
│       ├── workflow_admin.php # Admin dashboard
│       ├── header.php         # Admin header
│       └── footer.php         # Admin footer
├── data/
│   └── workflows/
│       ├── workflows_config.json # Workflow definitions
│       ├── active_tickets.json   # Current tickets
│       └── ticket_history.jsonl  # Event log
└── logs/
    └── localhost_emails/        # Development email logs

```

Frequently Asked Questions (FAQ)

General Questions

Q: How long do I have to respond to a workflow request?

A: Response deadlines vary by workflow type:

- Financial Access Requests: 14 days
- Membership Inquiries: 7 days
- Volunteer Interest: 14 days

Q: Can I edit a ticket after submitting it?

A: No, tickets cannot be edited after submission. If you need to add information, you can submit a new request or the recipient can respond with questions.

Q: What happens if I don't respond to a request?

A: The ticket remains in "pending_response" status. The originator can see the status and may follow up. You can resend confirmation requests if needed.

Q: Can I cancel a request?

A: Currently, requests cannot be cancelled. If you no longer need the request, you can mark it as resolved when the recipient fulfills it, or contact the recipient directly.

Technical Questions

Q: I received an "Invalid token" error. What should I do?

A: Tokens expire after 48 hours. If your token expired:

1. Check your email for a newer notification
2. Use the "Resend Confirmation Request" button if available
3. Contact support if you continue to have issues

Q: Why can't I see my tickets on the home page?

A: Make sure you're logged in with the same email address you used to submit the request. Tickets are matched by email address (case-insensitive).

Q: The form says I need to log in, but I am logged in. What's wrong?

A: Try logging out and logging back in. Make sure your session is active. If the problem persists, contact support.

Q: Can I attach files to my request?

A: Currently, file attachments are not supported. You can describe what you need in your message, and the recipient can arrange file sharing separately if needed.

Troubleshooting

Problem: Form won't submit**Possible Causes:**

- Required fields are empty
- Verification question answered incorrectly

- Message too long (>10,000 characters)
- JavaScript disabled

Solutions:

1. Check all required fields are filled
2. Answer the verification question correctly
3. Shorten your message if needed
4. Enable JavaScript in your browser

Problem: Email notification not received

If in Development (localhost):

- Emails are NOT sent, they're logged to `logs/localhost_emails/`
- Check the log files for email content

If in Production:

- Check spam/junk folder
- Verify email address is correct
- Check SMTP configuration
- Review email service logs

Problem: Token expired

Solution:

- Tokens expire after 48 hours for security
- Request a new link from the recipient
- Use the "Resend Confirmation Request" feature if available

Problem: Can't access ticket

Possible Causes:

- Token expired
- Wrong email address
- Invalid ticket ID

Solutions:

1. Check you're using the correct email address
 2. Request a new link if token expired
 3. Verify ticket ID is correct
-

Accessibility

The workflow system is designed with accessibility in mind:

- **Keyboard Navigation:** All actions can be performed using keyboard only
- **Screen Readers:** Semantic HTML and ARIA labels are used
- **Color Contrast:** Status indicators meet WCAG AA standards
- **Form Labels:** All form fields have associated labels
- **Error Messages:** Clear, descriptive error messages

If you encounter accessibility issues, please contact us via the Membership Inquiry workflow.

Support and Questions

If you have questions about the workflow system:

1. **Check this documentation** first
 2. **Review the FAQ section** above
 3. **Contact the System Administrator** via the Membership Inquiry workflow
 4. **Review your ticket status** in the My Requests page
 5. **Check email notifications** for updates and action links
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Version History

- **v1.0** (January 2025)
 - Initial release
 - Three workflow types (Financial Access, Membership, Volunteer Interest)
 - Token-based security

- Email notifications
 - Resend confirmation request feature
 - Admin dashboard with progress tracking
 - Enhanced error handling
 - Improved UX with loading states and validation
 - Search and filter functionality
 - Comprehensive documentation
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Document Maintained By: PMTNM Technical Team

For Technical Issues: Contact System Administrator via Membership Inquiry workflow

Last Updated: January 2025