

Install: Advanced Send Email

Views: ★★★★★☆

Modified: 2011

Status: 8/15/2017

Published

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*This article applies to: **Cireson Advanced Send Email App**, version v2.0.2012.20 and above for **SCSM 2012**, and v2.0.2016.20 for **SCSM 2016**.*

Overview

The **Advanced Send Email** solution was jointly developed between Cireson and itnetx. Building on the same general idea as the original Send Email community solution, the Advanced Send Email solution allows an analyst to send an email to the affected user or other recipients from the context of an incident in the Service Manager console. The Advanced Send Email solution has several advantages over the original solution:

- It is very simple to deploy and configure. It does not require any XML editing.
- Analysts can attach files to the outbound email.
- The analyst can choose a notification template, see the content of the message body based on the template and change the text before sending the email.
- The analyst can optionally add the message body to the action log of the incident automatically.
- The analyst can add additional recipients to the To or CC before sending the email.
- The admin can configure an SMTP server to use to send the email.
- The admin can filter the list of available notification templates based on a naming convention.

The following set of instructions will guide you through the installation, configuration, and usage of the Advanced Send Email solution.

Step 1: Installation

To install the Advanced Send Email solution, please follow the steps below.

- Import the provided Cireson.itnetx.AdvancedSendEmail.Library.mpb file into System Center Service Manager. One convenient way to do this is from the Service Manager console in the Administration\Management Packs view. Click on Import Management Pack and browse to the .mpb file (note: you will need to change the file type filter in the lower right corner of the browse dialog to show *.mpb files).
- Restart the SCSM console.

Step 2: Configuration

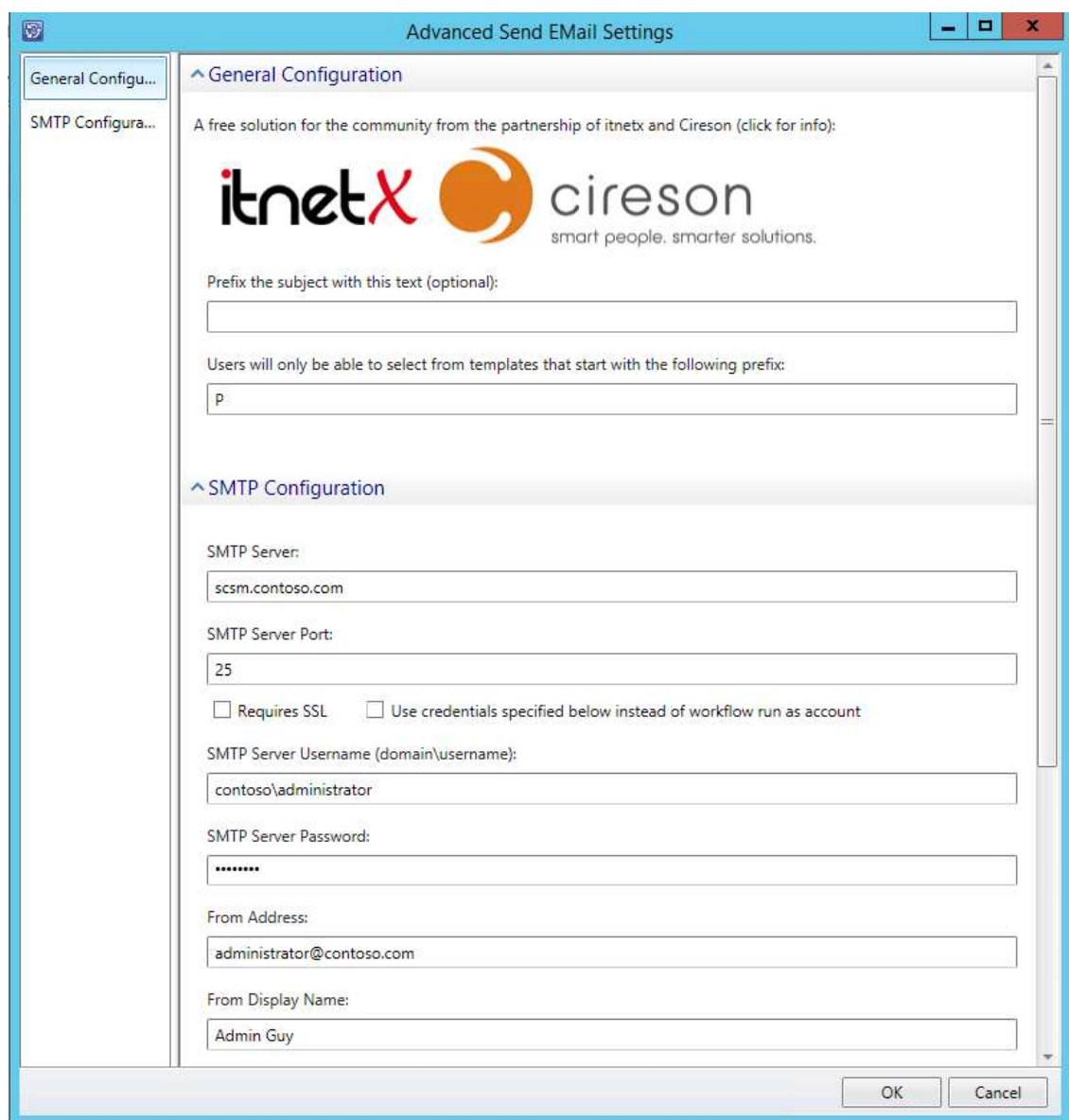
To configure the Advanced Send Email solution, in the Service Manager console navigate to the Administration\Settings view. Click on the Advanced Send Email Settings item and click Properties in the task pane on the right. If you want to, you can optionally choose to configure a default email subject prefix that will be added to the subject of all outgoing emails by default. Note: the incident ID will **always** (regardless of whether or not a prefix is configured here) be added to the beginning of the email subject in square brackets so that if the Exchange connector is in place and the user replies to the email the email will be processed by the Exchange connector. The next configuration option allows you to specify which templates the analysts should be able to choose from by specifying a template name prefix to search for. For example, you could name all the templates that you want the analyst to choose from in the Send Email Form with 'Send Email Form - '. For example:

- Send Email Form – Request Additional Information
- Send Email Form – Update the User on Status
- Send Email Form – Ask the User to Cancel the Request

When the analyst chooses a template he will only see the names of the templates *without* the prefix. Using the examples above, the analyst will only see:

- Request Additional Information
- Update the User on Status
- Ask the User to Cancel the Request

This step may require you to create new templates or rename some existing templates first. To do that, close the settings dialog temporarily using the Cancel button. After creating the necessary templates or renaming them you can come back to the Advanced Send Email Settings dialog and configure the template prefix. The next collection of settings are all used for configuring a connection to an SMTP server. Specify the name of the SMTP server and port number first. You can optionally choose to connect using SSL. For credentials to use, you have two options: 1) Use the SCSM workflow run as account. This is a good option to use if you don't want to manage an additional set of credentials and associated passwords and if your SCSM workflow run as account is already configured to send emails. 2) Use other credentials. You can also specify a domain\username and password to use. Keep in mind that as the password changes, you will need to come back to this dialog to update the password. Lastly, you can configure the From email address and display name. The email address should match the email address of either the SCSM workflow run as account or the user account that you specify.



Advanced Send Email Admin Settings

Once the configuration steps are complete, you are ready to begin using the Advanced Send Email solution. You can either click the Send Email task in the Tasks pane of an incident view when an incident is selected or in the Tasks pane of an incident form. In the Send Email Form dialog the To address will be automatically populated with the email address associated with the affected user (if there is one). You can either remove that or add additional email addresses to the To or CC. The email subject will default to the prefix (if configured) + the incident title. You can change the default subject this as needed. You can then optionally choose a template from the Template drop down. A few notes about template selection in this version:

- This template option will only work for notification templates based on English and only where there is **one** language defined for the template.
- The template format can only be plain text. HTML formatting is not supported.
- The template selection will not configure the subject.
- If the template contains "substitution strings" (e.g. \$Context/Property[.....\$) the object property values will not be substituted automatically.

You can then optionally choose to attach a file. Lastly, you can choose to optionally add the message to the action log. When ready, click the OK button to send the email!

The screenshot shows a dialog box titled "Send EMail Form". It contains the following fields and controls:

- To address (semicolon separated):** A text box containing "travis.wright@cireson.com".
- CC address (semicolon separated):** An empty text box.
- Subject:** A text box containing "Printer is out of paper".
- Template:** A dropdown menu.
- Message:** A large text area with a red asterisk on the left side. Below the text area is the number "4000".
- Attachment:** An empty text box.
- Add Attachment:** A button.
- Add message to action log**
- OK** and **Cancel** buttons at the bottom right.

Advanced Send Email Form