TIBCO iProcess® Email Plug-in

User Guide

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Introduction

This section provides an introduction to the TIBCO iProcess Email Plug-in and provides an overview of how it works.

About the iProcess Email Plug-in

The iProcess Email Plug-in enables you to send mail messages from your iProcess procedures to an SMTP server. This is useful, for example, if you have a business process that involves sending confirmation e-mails when a customer places an order. The data from the case of the iProcess procedure can be embedded in the mail message and sent to the customer.

The iProcess Email Plug-in consists of two components:

- iProcess Email Client Plug-in — this component is installed on the same machine as the TIBCO iProcess Workspace (Windows) and the TIBCO iProcess Modeler and enables you to define iProcess Email steps in your iProcess procedures. The iProcess Email steps enable an iProcess procedure to send mail messages to an SMTP server.
- iProcess Email Server Plug-in — this component is installed on the same machine as the TIBCO iProcess Engine. The iProcess Engine processes the procedure and any iProcess Email steps are processed by the iProcess Email Server Plug-in.

For information on installing the server component, see the *TIBCO iProcess Engine Installation*. For installing the client component, see the *TIBCO iProcess Workspace Installation Guide*.

Overview of How the iProcess Email Plug-in Works

When a case of a procedure that contains an iProcess Email step is run, the iProcess Email Plug-in:

1. Determines which SMTP parameters to use. It can use the global parameters defined in the custom SMTP file (see Defining a Global SMTP Parameter File) or those defined in the iProcess Email step.
2. Creates the session information and connects to the SMTP server.
3. Replaces case data tokens in the mail message fields with actual case data. The iProcess Email step enables you to embed iProcess fields in the mail message. At run-time, the data from the iProcess field is embedded in the mail message. For more information, see Define the Mail Message Definition.
4. Replaces any iProcess expressions in mail message fields with the results of the evaluated expression. The iProcess Email step enables you to embed iProcess expressions in the mail message. At run-time, the results of the iProcess expressions are embedded in the mail message. See Using iProcess Expressions in Mail Message Parameters.
5. Replaces any iProcess arrays in mail message fields with actual case data. The iProcess Email step enables you to embed iProcess array fields in the mail message. At run-time, the data from the iProcess field is embedded in the mail message. See Using iProcess Array Fields in Mail Message Parameters.
6. Creates and transmits the mail message.
7. In the case of an error, determines whether the failure is caused by an SMTP server being unavailable. If so, it attempts to send the mail using any servers that have been defined as backups, trying each in turn. It then uses the successful backup server until the retry message limit is reached, when it attempts to connect to the primary server. If it still cannot connect to the primary server, it reverts to the successfully-used backup.

> **Note:** This retry functionality does not apply if the iProcess Email step definition specifies a custom SMTP server.

8. Optionally, returns an error code and error message from the SMTP server in an iProcess case data field.

Before Defining Your iProcess Email Steps

Before defining iProcess Email steps in your business process, you need to consider the following:

1. Your system must have access to at least one SMTP Server.
2. You must make sure the character set defined for the iProcess Email Plug-in is the same as the character set defined for the iProcess Engine. If it does not then this results in incorrect header information being generated for the e-mail messages. See Defining a Global SMTP Parameter File for information on how to define the character set using the **Charset** parameter in the `SWDIR\lib\eai_mail.cfg` file.
3. You must decide whether to use global SMTP parameters or whether to define different SMTP parameters for each iProcess Email step in your business process. See Defining a Global SMTP Parameter File.
4. You must decide how to handle errors in your business process. See Error Handling in the iProcess Email Step.

Defining a Global SMTP Parameter File

The iProcess Email Plug-in uses the global SMTP file to store global values for the SMTP servers you want to use. This is useful because rather than specifying the parameters of your SMTP server for each iProcess Email step, you can define them once in the global SMTP parameter file and reference this file each time you define an iProcess Email step.

> **Note:** You may have defined the SMTP server parameters when installing the iProcess Email Server Plug-in. (For more information, see the *TIBCO iProcess Engine Installation*.) If you did not do so, you should define them now. For more information on how you do this, see Specify the SMTP Parameters.

You can enter details of more than one SMTP server, using the BackupHost parameter for those after the first. If the first server fails, iProcess tries to fail over to the backup servers, trying each in turn in the order in which they are defined in the file until it succeeds in making a connection with one.

You can customize the global SMTP parameter file, depending on your requirements. The pathname to the global SMTP parameter file is *SWDIR*/**lib/eai_mail.cfg** if you are using a Windows server, or *SWDIR*/**libs/eai_mail.cfg** if you are using a UNIX server. If you configure custom SMTP parameters in an iProcess Email step, these take precedence over the parameters defined in the global SMTP parameter file.

If you make any changes to the global SMTP parameter file, restart the iProcess Engine. The changes will then take effect automatically.

Alternatively, you can re-register the iProcess Email Server Plug-in using *SWDIR*/**util/sweaireg REG** for the changes to take effect. On a Windows server, the command is:

```
sweaireg REG EAI_MAIL [-m machine_name] -l SWDIR\lib\eai_mail_11_0_0_0.ear –i
SWDIR\lib\eai_mail.cfg [-y]
```

On a UNIX server, the command is:

```
sweaireg REG EAI_MAIL [-m machine_name] -l SWDIR/libs/eai_mail_11_0_0_0.ear –i
SWDIR/libs/eai_mail.cfg [-y]
```

where:

- *EAI_MAIL* is the short name of the EAI step type handled by this plug-in.
- *machine_name* is the optional name of the server in the TIBCO iProcess Engine node cluster on which the plug-in is to be registered. If this value is omitted, the default is the server on which the command is being run. This can be a text string up to 256 characters.
- *-y* can be used to automatically answer yes to all the `sweaireg` command prompts so the command is run immediately without displaying the prompts.

For more information about *SWDIR*/**util/sweaireg**, see "Managing EAI Server Plug-ins" in the *TIBCO iProcess Engine Administrator's Guide*.

Note: In a node cluster configuration, you must run **sweaireg** for each node in the cluster.

To amend the global SMTP parameter file, open the file in a text editor and make the changes you require.

Shown below is an example of a *SWDIR*/**lib/eai_mail.cfg** file.

```
# SMTP
Host=mymailserver.com
Port=25
#Backup Hosts (Tried in the order they are defined if primary host fails
)
BackupHost=backupserver1.com
BackupPort=26
BackupHost=anotherbackupserver.com
BackupPort=27
```

```
RetryMsgCount=5
# Mail
From=username@companyname.com
Charset=ISO-8859-1
# Headers
X-Email-Info-1: This email message has been delivered by the TIBCO
iProcess email plug-in.
X-Email-Info-2: Visit www.tibco.com for further information.
X-Email-Info-3: This message is intended for the named addressee only.
```

The following table describes each of the parameters in the *SWDIR*/**lib/eai_mail.cfg** file that you can set:

Parameter	Description
Host	The machine name or the IP address of the machine hosting the SMTP server. If you do not know this, or the next two parameters, ask the system administrator for that machine.
Port	The port number on which the SMTP server is running.
Charset	The character set ID. For example, ISO-8859-1 (this is the commonest character set for English and several other European languages). **Note:** The character set must match the character set defined for the TIBCO iProcess Engine. If it does not then this results in incorrect header information being generated for the e-mail messages.
BackupHost	The machine name or the IP address of the machine hosting the backup SMTP server. There can be as many BackupHost entries as there are SMTP servers available for failover.
BackupPort	The port number on which the preceding BackupHost is running. There must be one BackupPort entry for each BackupHost server. Each BackupHost entry uses the next BackupPort entry it finds as the port for that server. Therefore it is important to ensure that the BackupHost and BackupPort entries are in the correct order.
RetryMsgCount	How many times the plug-in should use a backup server before retrying the primary host. Enter a non-zero numeric value. The default is *3*.

Parameter	Description
	Note that: • If a negative value is entered, it is interpreted as *50*. • If zero or a non-numeric value is entered, the configuration of backup servers has no effect and the plug-in reverts to the main Host.
From	The mail address of the sender. If a value is defined for the **From** field when defining the iProcess Mail step, then it takes precedence over this parameter. This enables you to specify that mail sent as part of a specific procedure step should be sent from a different address to that otherwise used. The address must exist on the SMTP server, since if it does not, the mail cannot be sent.
X-Email-Info-1, X-Email-Info-2, X-Email-Info-3:	Three items of static text that can be added to the message header for all mail messages. You can use this for standard information that you want to go out on all messages, perhaps information about your company.

Error Handling in the iProcess Email Step

The iProcess Database Plug-in uses the message codes and messages that are returned from the SMTP server.

The following table describes the message codes and messages that are reported from the iProcess Email Plug-in. The message codes are standard, but the message text associated with the codes may vary from one manufacturer's SMTP server to another; consult the documentation provided with your SMTP server for further information.

Message Code	Message	Possible Cause
`100001`	Mail attachment file not found	You may have specified an incorrect filename for an attachment, or the attachment may have been deleted.

Message Code	Message	Possible Cause
`100002`	SMTP Connect error	An error occurred connecting to the SMTP server. Check that the SMTP server is running, and check the network configuration.
`100003`	Mail From email address is not valid	A valid Mail From address must exist on your SMTP server. Check that one is set up on the SMTP server and specified in the `eai_mail.cfg` file.
`100004`	Unknown recipient	You may have made a mistake entering the recipient's address, or the address may not exist. Note that some SMTP servers will accept invalid or non-existent addresses, and will not return a 100004 code. If so, the SMTP server will eventually return an "Undeliverable" mail to the sender.
`100005`	Error sending data command	There was a problem communicating with the SMTP server. Check that the SMTP server is running, and check the network configuration.
`100006`	Error terminating mail message	There was a problem sending the **dot** command to terminate the mail message. Check that the SMTP server is running, and check the network configuration. If these are both working correctly, there may be a problem with the mail message itself; try sending another message.
`100007`	Error sending quit command	There was a problem terminating the connection to the SMTP server. Check that the SMTP server is running, and check the network configuration. If these are both working correctly, there may be a problem with the mail message itself; try sending another message.
`1000010`	Unknown error	

The example below demonstrates a message that could be returned if a mail message is sent to an invalid email address:

```
RtnCode = 100004
RtnMsg =
550 5.7.1 Unable to relay for <invalid email address>
554 5.5.2 No valid recipients
500 5.3.3 Unrecognized command
```

You can choose to output these warnings and errors to an iProcess field when you define an iProcess Email step in your iProcess procedure. See Configure Error Handling for information on defining error handling in the iProcess Email step. This is useful if you want to build some error handling into your iProcess procedure. For example, you could define a condition in a procedure so that if message code **100004** is returned, a work item is delivered to an Administrator's work queue. This would enable the Administrator to check the invalid email address.

Any message codes and messages that are generated are reported to the following locations:

- Warnings and errors are reported to the *SWDIR*/**logs/sw_error** and *SWDIR*/**logs/sw_warn** files when the iProcess Background processes detect an error from the iProcess Email Server Plug-in.
- (Optional) Warnings and errors can additionally be reported to the iProcess Email step from the SMTP Server. For information on defining error handling in the iProcess Email step, see Configure Error Handling.

Creating iProcess Email Steps

This section describes how to define iProcess Email steps in your iProcess procedures. iProcess Email steps enable you to send mail messages from iProcess procedures to an SMTP server.

Creating an iProcess Email Step

To create an iProcess Email step in your procedure, you need to perform the following steps:

1. Define Basic EAI Step Information (Name, Description, Step Type, and EAI Step Type.)
2. Define the Mail Message Definition.
3. Optionally, Specify the Attachments.
4. Optionally, Specify the SMTP Parameters.
5. Optionally, Configure Error Handling.

When you have done this, the EAI step type is defined as an iProcess Email step and the following icon is displayed: .

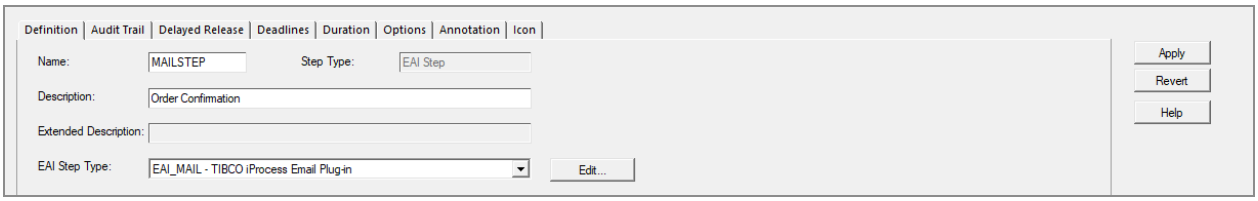
Define Basic EAI Step Information

1. Start the TIBCO iProcess Modeler, click the EAI Step tool then place it on your procedure definition.
2. In the Properties pane, enter the **Name** and **Description** for the step.
3. In the **EAI Step Type** dropdown list, select **EAI_MAIL - TIBCO iProcess Email Plug-in**.

   You must select this entry when you first create the step, it cannot be changed later. The list box displays EAI step types that have been installed as client EAI plug-ins. This name is used as the link between the EAI step and the run-time plug-in

registered on the iProcess Engine(s).

> **Note:** If the iProcess Email step type does not appear in the dropdown list, you need to ensure that the plug-in is installed. For details of installing the client, see the *TIBCO iProcess Workspace Installation Guide*.



4. (Optional) On the **Options** tab, click the **Ignore Case Suspend** checkbox if you want the Email step to still be processed as normal while a case is suspended by an iProcess Objects or SAL application.

   If **Ignore Case Suspend** is not checked (the default option), the Email step is not processed while the case is suspended. Deadlines on the step are not processed, but the date and time at which deadlines are due are not affected, so the deadlines continue to expire. However, no actions are processed when a deadline expires. When the case is re-activated, any expired deadlines are immediately processed.

5. (Optional) Click the **Don't delete work items on withdraw** checkbox. Email steps are completed so quickly that this option will only have any effect if a step is suspended - that is, if the **Ignore Case Suspend** field is not checked. If this option is selected, and the deadline on an outstanding step expires as a result of such suspension:

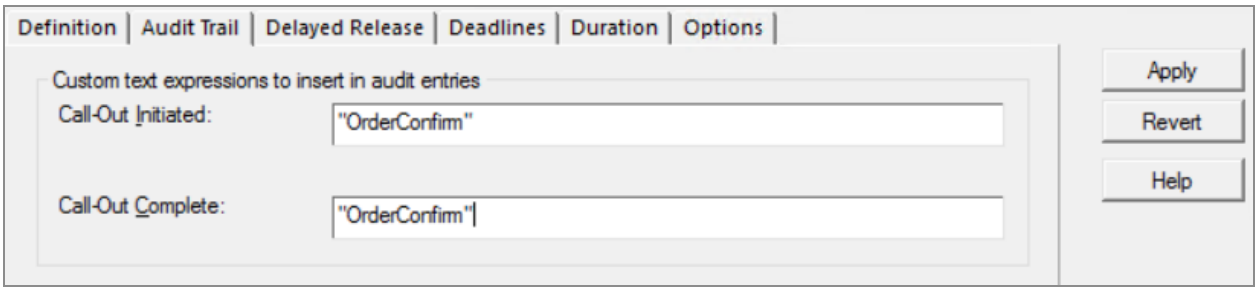
   — the step remains outstanding.

   — the deadline actions are processed (once the case ceases to be suspended).

   — when the step completes, the normal release actions are not processed but any data in the return status fields is applied to the main case data.

> **Note:** Cases can only be suspended and re-activated from an iProcess Objects or SAL application. Audit trail messages indicate whether a case is active or suspended. Refer to the iProcess Objects documentation for more information about suspending cases.

6. Click the **Audit Trail** tab to define custom audit trail entry expressions.



This enables you to define text expressions that are evaluated when the step is processed and inserted (as the value of the %USER variable) to identify the user in the audit trail entries:

— In the **Call-out Initiated** field, enter a valid text expression that will replace the %USER value in the audit trail when the call out is initiated.

— In the **Call-out Complete** field, enter a valid text expression that will replace the %USER value in the audit trail when the call out is complete.

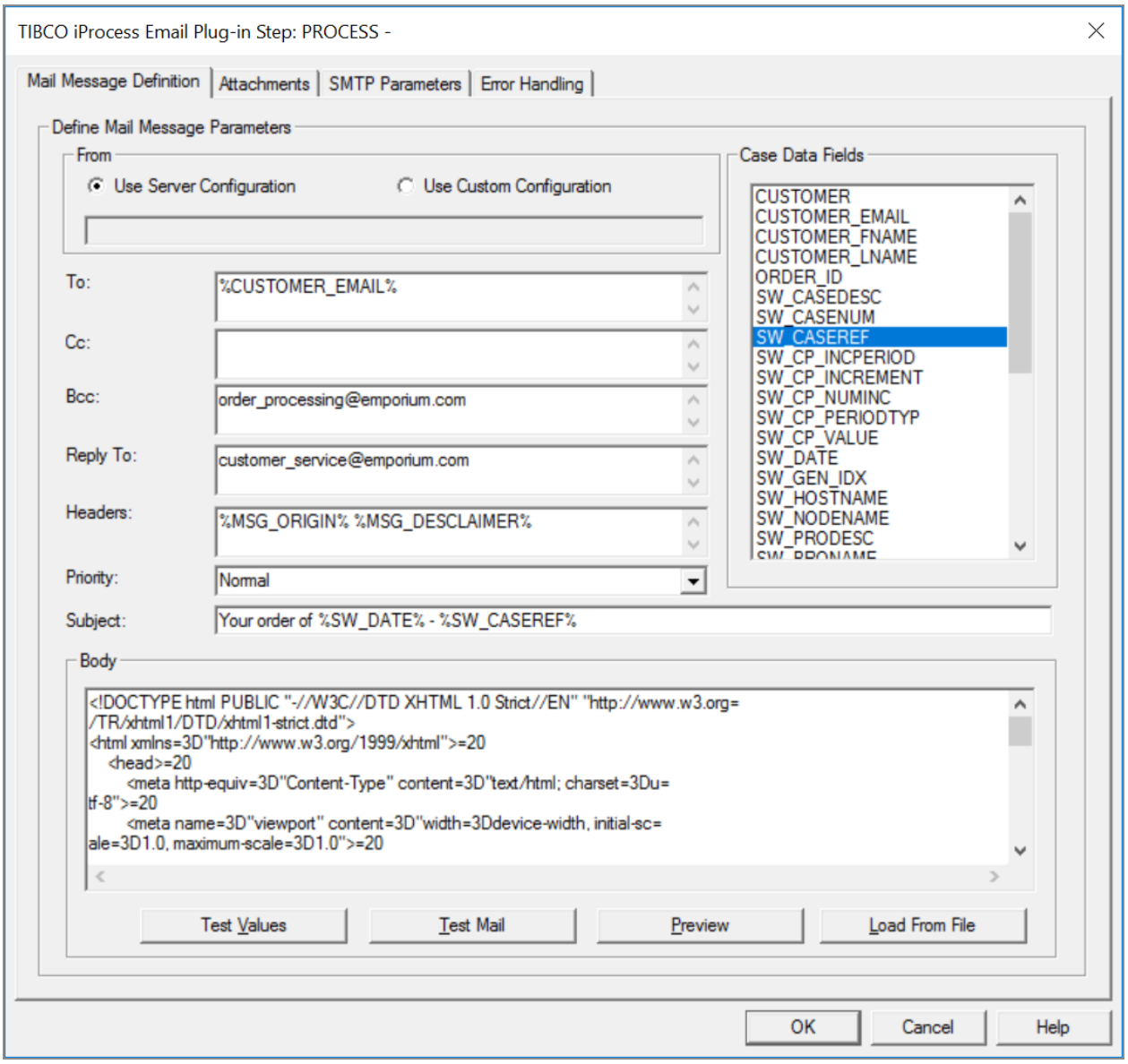
Note: Custom audit trail entry expressions must be enclosed in double quotation marks.

7. Click the **Deadlines** tab if you want to enter deadline information for this step. You can also enter the step duration if you are using case prediction. For an explanation of defining deadlines and using case prediction, see “Using Deadlines” in the *TIBCO iProcess Modeler Basic Design*.
8. Click the **Definition** tab, then click **Edit**. The **TIBCO iProcess Email Plug-in Step** dialog is displayed.

Note: Delayed Release is not supported by the iProcess Email Plug-in, so the fields on the **Delayed Release** tab are not available.

Define the Mail Message Definition

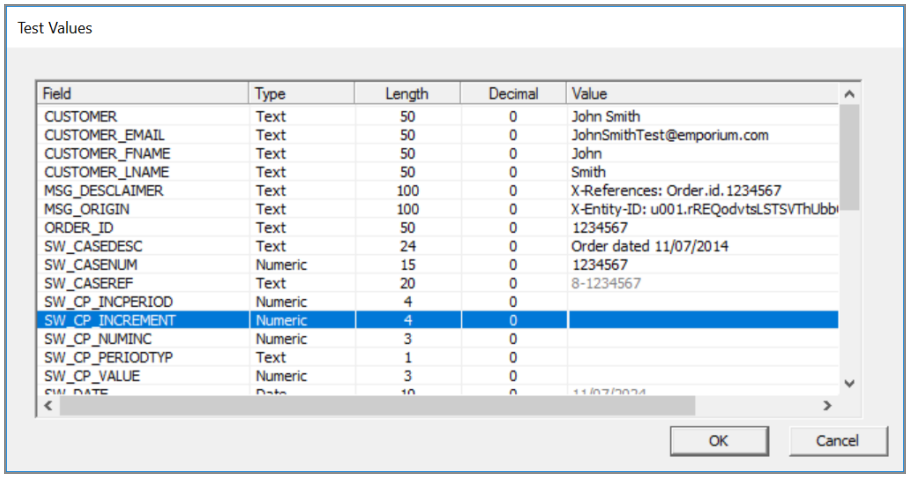
The **Mail Message Definition** tab enables you to define the mail message.



The following table describes the parameters that you can define in the mail message that you want to send from your iProcess procedure to the SMTP server:

Field	Description
Headers	Message headers provide a list of technical details, such as who sent the mail message, the software used to compose it and the e-mail servers it passed through to get to the recipient. You can supply a list of headers in a single string, using a semi-colon as a delimiter.

Field	Description
From	The mail address of the sender. Select **Use Server Configuration** to use the address defined in the global SMTP parameter file, or select **Use Custom Configuration** to enter an address specific to this step; the text field then becomes available for you to enter the address.
To	The mail address of the recipient. You can supply a list of recipients in a single string, using a semi-colon as a delimiter. You can also use an array; see Using iProcess Array Fields in Mail Message Parameters.
Cc	Cc stands for carbon copy. Adding a recipient's name to this field means that a copy of the message is sent to the recipient. The recipient's name is visible to the other recipients of the message. You can supply a list of recipients in a single string, using a semi-colon as a delimiter. You can also use an array; see Using iProcess Array Fields in Mail Message Parameters.
Bcc	Bcc stands for blind carbon copy. Adding a recipient's name to this field means that a copy of the message is sent to the recipient but the recipient's name is not visible to the other recipients of the message. You can supply a list of recipients in a single string, using a semi-colon as a delimiter. You can also use an array; see Using iProcess Array Fields in Mail Message Parameters.
Reply To	The reply mail address for the mail message. You can supply a list of reply mail addresses in a single string, using a semi-colon as a delimiter.
Priority	Priorities enable you to prioritize some mail messages over others. You can select one of High, Normal or Low from the dropdown list in this field; or you can use an iProcess case data field.
Attachments	The attachments you want to insert with the mail message. You can attach an external file or the case data from an iProcess field of type MEMO. You can supply a list of attachments, using a semi-colon as a delimiter. Each attachment can be the name of an iProcess field of type MEMO or an array or pathname to a file; see Specify the Attachments.
Subject	The subject of the mail message.

Field	Description
Body	The body of the message. This can be either: • Plain text • HTML/XHTML The body of the message has the following options: • Test Values: Click **Test Values** button to set values to the case fields to use in Test Mail and Preview options instead of the run-time case values. **Note:** The values which are inserted in the Test Values window are applicable only to the Test Mail and Preview options but not for the run-time.  • Test Mail: Click the **Test Mail** button to send a test email to the recipient. • Preview: Click the **Preview** button to view the body of the email. • Load From File: Click the **Load From File** button if you want to load the body of the message from an existing file. The contents of the file are displayed in this field, where you can amend it.

Using iProcess Fields in Mail Message Parameters

You can insert iProcess fields into the mail message parameters. To do this:

1. From the **Case Data Fields** list, scroll down the list of iProcess fields until you find the one that you want. The list of iProcess fields contains the iProcess fields that are available for the procedure where you are defining your iProcess Email step.
2. Drag the iProcess field to the mail message parameter. The iProcess field is inserted in the mail message parameter in the following format:

   %*fieldname*%

   where *fieldname* is the name of the iProcess field.

   The following table describes the types of iProcess field that will be accepted in each mail message parameter. Normally, however, only text fields would be useful for the various email address parameters (**From**, **To**, **Cc**, **Bcc** and **Reply To**).

Mail Field	iProcess Data Type
Headers	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
From	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
To	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Cc	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Bcc	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Reply To	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Priority	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Attachments	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE, MEMO
Subject	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE
Body	TEXT, NUMERIC, CSN, DATE, TIME, COMPOSITE, MEMO

   For more information about field types, see "Defining a Field" in the *TIBCO iProcess Modeler Basic Design Guide*.

Note:
Expression evaluations and functions may not work in Test Mail and Preview but works at run-time.

Using iProcess Expressions in Mail Message Parameters

%*expression*%

where *expression* is the iProcess expression.

Shown below is an example of an expression that could be entered in a mail message parameter:

%EMPLOYEE:SALUTATION + " " + EMPLOYEE:FNAME + " " + EMPLOYEE:LNAME%

For more information about iProcess expressions, see the *TIBCO iProcess Expressions and Functions Reference Guide*.

Using iProcess Array Fields in Mail Message Parameters

You can insert iProcess array fields into the mail message parameters. How you enter the array field depends on the mail message parameter where you want to insert the array field. The following table describes how array fields should be entered for each mail message parameter:

Mail Message Parameter	Array Field Notation
To, Cc, Bcc, Reply To, Attachments and Header	%*arrayfield*% where *arrayfield* is the name of the iProcess array field. Each item in the array is listed as a separate address, attachment, or header. This enables you, for example, to specify all the addresses in a mailing list, or to send the same set of attachments with each message.
Subject, Priority	In these mail message parameters you must specify a specific element in an array. Whereas a message can be sent to many addresses, it will only have one subject and one priority. So if, for example, an array field lists the priorities Urgent, High, Standard, and Low, specifying one element enables you to select the priority for the message. Enter the array field in the following format:

Mail Message Parameter	Array Field Notation
	%*arrayfield*[*elementreference*]% where: • *arrayfield* is the name of the iProcess array field • *elementreference* is the specific element in the array field that you want to reference.

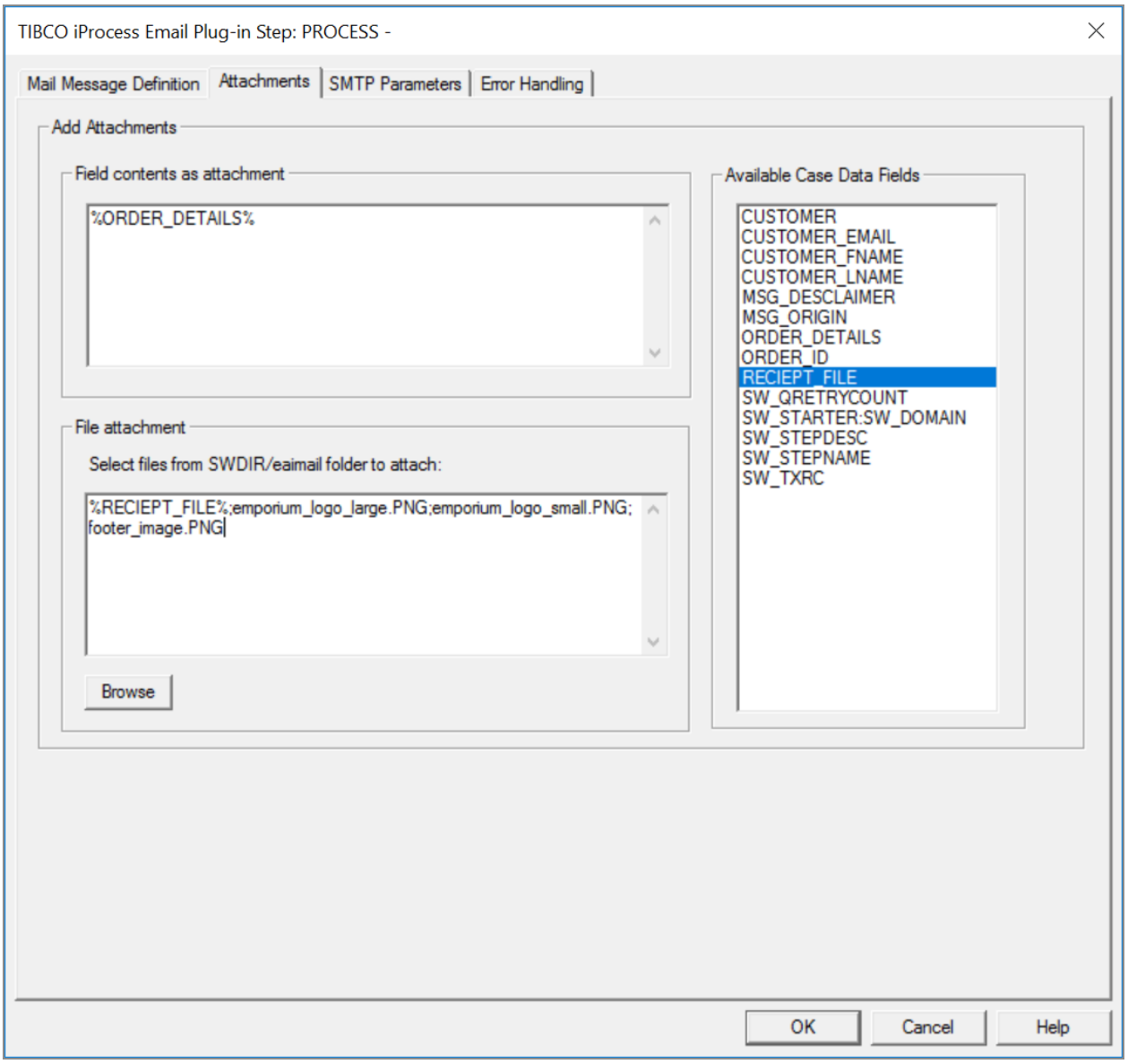
For more information on array fields, see "Using Array Fields" in the *TIBCO iProcess Modeler Advanced Design Guide*.

Specify the Attachments

The **Attachments** tab enables you to specify any attachments that you want to insert with your mail message.

During the installation of iProcess Engine, a new folder `eaimail` is created under the installation path, **SWDIR\eaimail**.

Place the files that you want to attach in the EAIMAIL plug-in in the `eaimail` folder.



You can insert two types of attachments:

- an iProcess memo
- an external file

Inserting an iProcess Memo as an Attachment

To insert an iProcess memo, drag the memo field you want to insert as an attachment from the **Available Case Data Fields** box to the **Field contents as attachment** box. The memo field is inserted in the mail message parameter in the following format:

%*memo*%

Note: An iProcess field of type MEMO should only be used in the **Field contents as attachment** box. These fields should not be used in the **File Attachment** box.

At run time, the resulting email message produced by this step has an attachment named *memo.suffix*, where:

- *memo* is the name of the memo field.
- *suffix* is .htm if the memo contains HTML, or .txt if it does not.

Inserting an External File as an Attachment

To insert an external file, either:

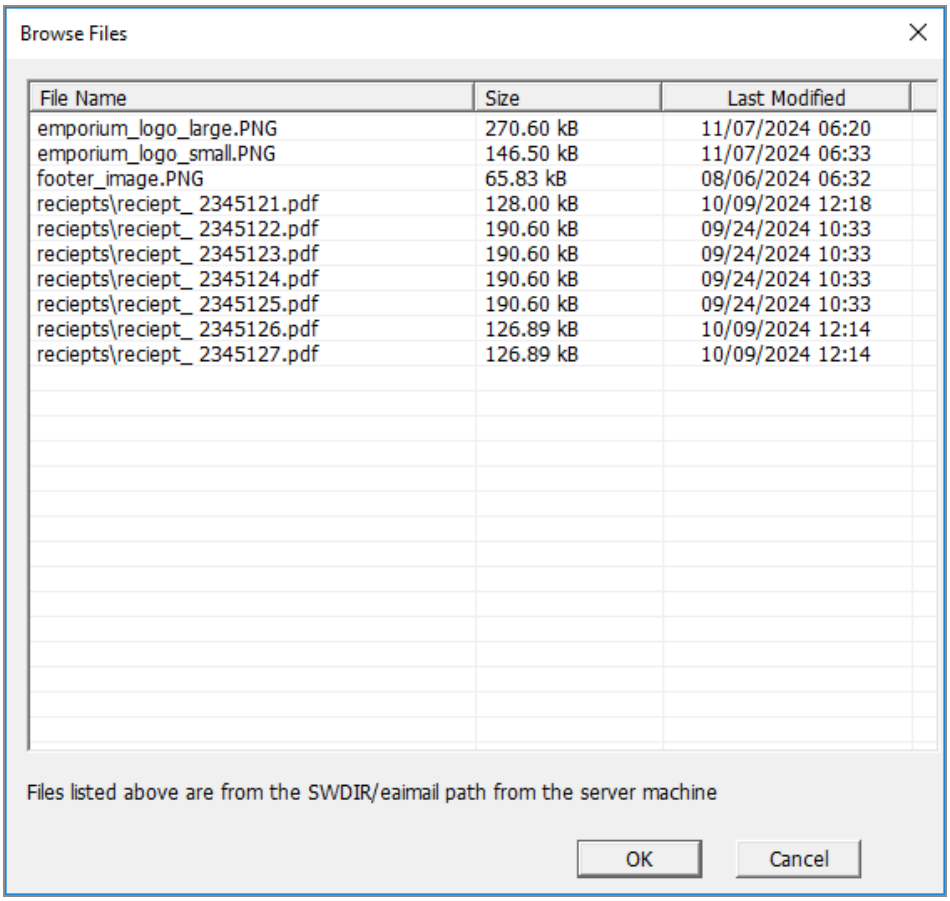
- drag the iProcess field from the **Available Case Data Fields** list to the **File attachment** list. The iProcess field is inserted in the following format:

  %*fieldname*%

  where *fieldname* is the name of the iProcess field. At run time, the field value is retrieved (for example, c:\temp\file.txt) and this file is attached to the resulting email message.

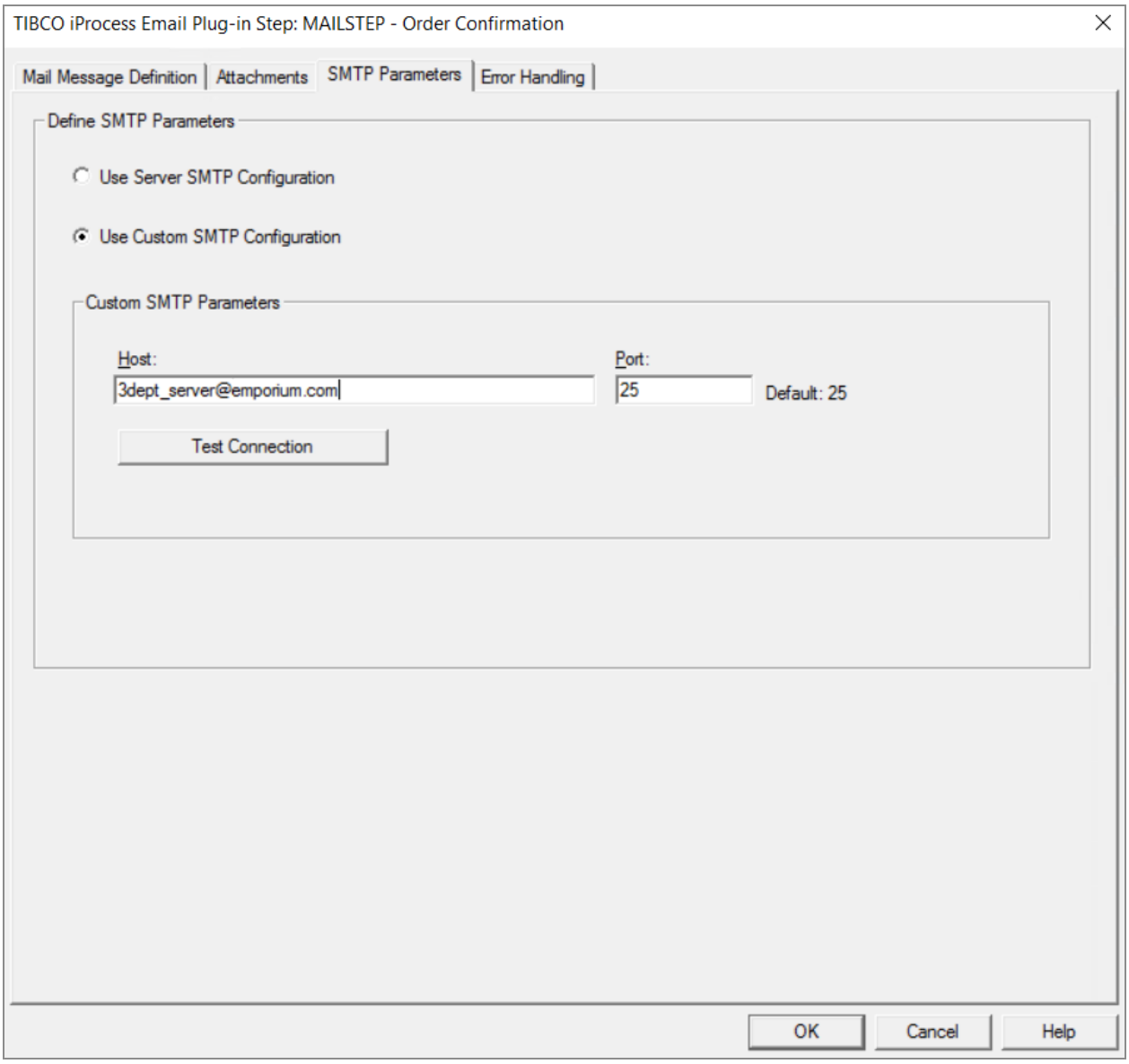
Note: An iProcess field of type MEMO should not be used here as these fields contain carriage returns. This means that, at run time, the path to the file would not be evaluated correctly.

- click **Browse** to select the files that are placed in the iProcess Engine installation directory, **SWDIR\eaimail** and click **Ok** to attach the files.



Specify the SMTP Parameters

The **SMTP Parameters** tab enables you to specify hostname and port number values for the SMTP server that you want to connect to.



1. From the **SMTP Parameters** tab, select one of the following radio buttons:
   - **Use Server SMTP Configuration**. Select this radio button if you have configured a global SMTP parameter file. See Defining a Global SMTP Parameter File.
   - **Use Custom SMTP Configuration**. Select this radio button if you want to configure custom SMTP parameters for this particular iProcess Email step. If you do so, they will override the global SMTP parameters for this step.
2. If you selected **Use Custom SMTP Configuration**, the **Host** and **Port** fields are enabled. Complete the fields by providing the following details:

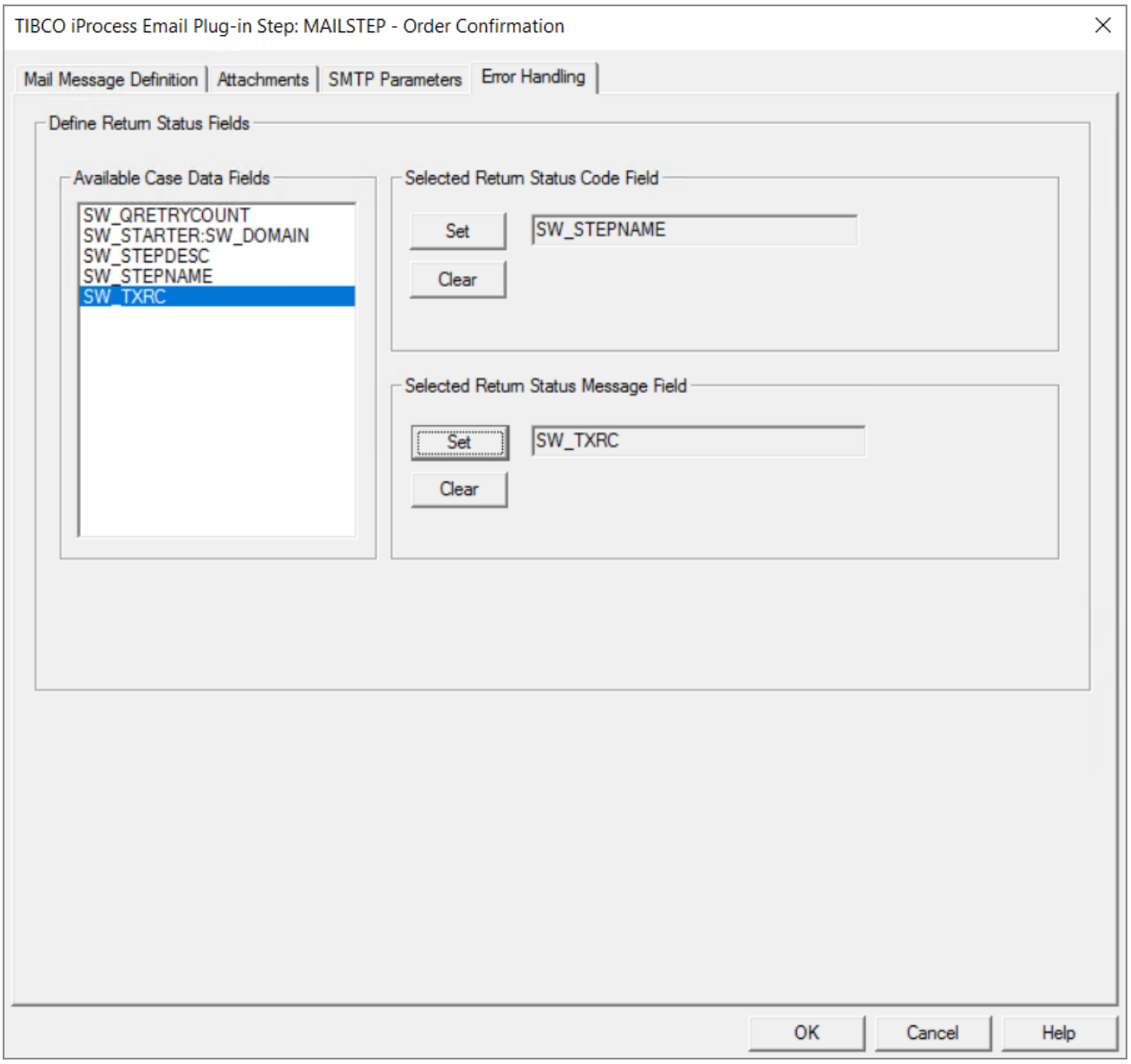
— In the **Host** field, enter the machine name or IP address of the machine that is hosting your SMTP server.

— In the **Port** field, enter the port number on which the SMTP server is running. The default is **25**.

Click **OK** to test if the connection to the SMTP server is working correctly. Since this test runs from the iProcess client, it may not be a completely reliable test of the connection if, for example, the path to the SMTP server from the iProcess server is different.

Configure Error Handling

The **Error Handling** tab enables you to configure which iProcess fields are used to contain the return status code and message from the SMTP server when processing the iProcess Email step.



1. From the **Available Case Data Fields** box, highlight the field where you want to output the return status code, and click **Set** in the **Selected Return Status Code Field** box.

Note: There is no limitation on the type of iProcess field that can be used in the **Selected Return Status Field** box, but using a NUMERIC field enables you to use a condition step to check the value of the **Selected Return Status Field**.

2. From the **Available Case Data Fields** box, highlight the field where you want to output the return status message and click **Set** in the **Selected Return Status Message Field** box.

Note: TIBCO recommends using an iProcess field that has a data type of MEMO in the **Selected Return Status Message Field** box.

For more information, see Error Handling in the iProcess Email Step.

TIBCO Documentation and Support Services

For information about this product, you can read the documentation, contact TIBCO Support, and join TIBCO Community.

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the Product Documentation website, mainly in HTML and PDF formats.

The Product Documentation website is updated frequently and is more current than any other documentation included with the product.

Product-Specific Documentation

The following documentation for this product is available on the TIBCO iProcess® Workspace (Windows) Product Documentation page:

Other TIBCO Product Documentation

When working with TIBCO iProcess® Email Plug-in, you may find it useful to read the documentation of the following TIBCO products:

- TIBCO ActiveMatrix BusinessWorks™
- TIBCO Business Studio™
- TIBCO Enterprise Message Service™
- TIBCO Hawk®
- TIBCO Rendezvous®

How to Contact Support for TIBCO Products

You can contact the Support team in the following ways:

- To access the Support Knowledge Base and getting personalized content about

products you are interested in, visit our product Support website.

- To create a Support case, you must have a valid maintenance or support contract with a Cloud Software Group entity. You also need a username and password to log in to the product Support website. If you do not have a username, you can request one by clicking **Register** on the website.

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