Automation Anywhere®

Email_Outlook Metabot User Manual

DOCUMENT PURPOSE

The Process Document has been designed for use on process documentation efforts. Approvals must be obtained prior to implementation of a new process or updates to this document.

Automation Anywhere Client Setup
Template Released [Date]

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Document Control

a. **Document History**

Version	Date	Status: <Draft/ Final>	Author	Comment / Changes from Prior Version
1.0	Jan 22, 2018	First version	Jayadevan Namboothiri	First version
1.1	Feb 12, 2018	Update	Jayadevan Namboothiri	Added prerequisites

b. **Document Reviewers/Approvers**

Name	Position (e.g. Client Manager, Project Manager etc.)	Reviewer (only)	Reviewer and Approver
Gennadiy Makovoz	Application Owner		
Michael Liberov	Technology Manager		

Table of Contents

1. Introduction

The purpose of this document is to explain how to leverage ISG designed solution for integration of AutomationAnywhere robotics processes with Microsoft Office - Outlook client for sending emails.

ISG solution utilizes Microsoft office Interop .Net library for this component to work.

2. Prerequisites

Before the metabot can be leveraged for sending emails from BOT runner VDIs, make sure that following configurations are in place:

2.1 Create mail box for BOT FID.

Steps:

i. Fill in below table with relevant information:

Mailbox-FID	PrimarySponsor-SOEID	SecondarySponsor-SOEID	Mailbox-DisplayName	FullAccess-SOEID	Mailbox-extaddr	SendAs-SOEID
Ex:a00001			Ex: A00001	Ex: NAM\a00001	A00001@citi.com	A00001

ii. Submit a Servicenow (https://servicemanagement.citigroup.net/) incident ticket with above details and assign to "CTI GL EX MESSAGING-BACKBONE". (Team DL: backbone_support@imcap.ap.ssmb.com)

2.2 Outlook client installation

Make sure that outlook client is already installed in the VDI. MS Office will be available by default in all AA STE VDIs.

2.3   Configure the FID email as the default outlook profile in the VDI.

Steps:

i.   For DEV/UAT VDIs- Submit a Servicenow (https://servicemanagement.citigroup.net/) incident ticket requesting the same and assign to "**ICG GL AD ISG STE AA L3 SUPPORT**". (Team DL: ***GT GLOBAL STE AA**)

For Production VDIs – Create a change task and tag it to a valid change ticket. Assign the change task to AA STE – "**ICG GL AD ISG STE AA L3 SUPPORT"**

2.4   Outlook Client running in background

RPA code (AA task) should make sure that, outlook client is opened and is running in background, before executing the metabot command. Refer sample task (*Automation Anywhere\My Tasks\Common\ Email_Outlook\ SendEmail_Outlook.atmx)* for more details.

3.   Email_Outlook MetaBot Component

The MetaBot can be used as a separate component. It does not require any specific configurations. However, it requires and uses the Email_Automation DLL file.

Email_Outlook MetaBot consists of two items: SendEmail.logic and Email_Automation.dll where the .DLL file is an asset of the SendEmail.logic.

3.1   Email_Automation.dll

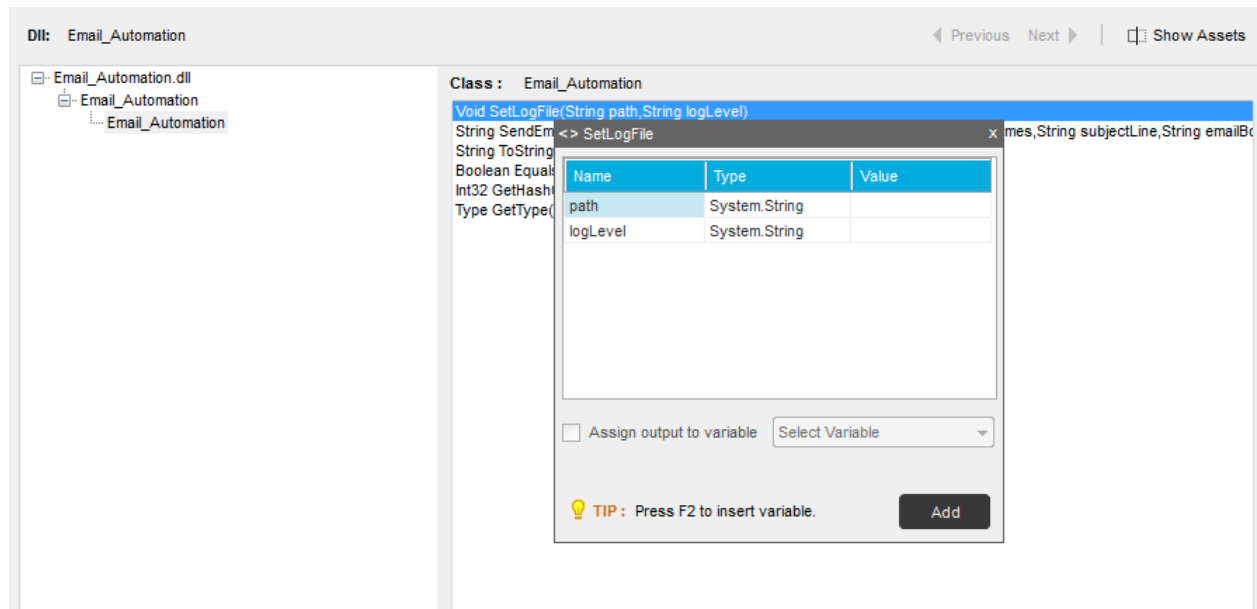The .dll contains the logic to send email through outlook client.
All required steps are logged into a specific file "SendEmail_Log – {date}.txt". The location of the file is provided by an input parameter.

Email_Automation.dll provides two useful methods.
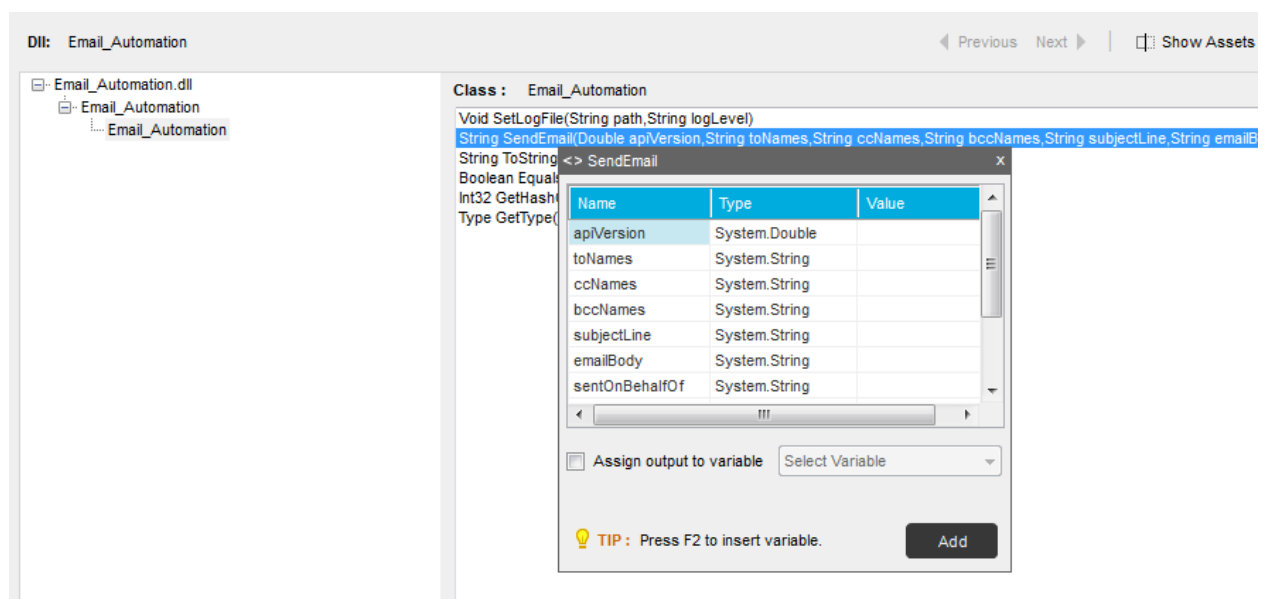
a)   SetLogFile(String path, String logLevel)

Where "path" is the location of the log file and "logLevel" is the logger log level.
There 4 types of log level: DEBUG,INFO,WARNING and DIAG. The default is/should be DEBUG.
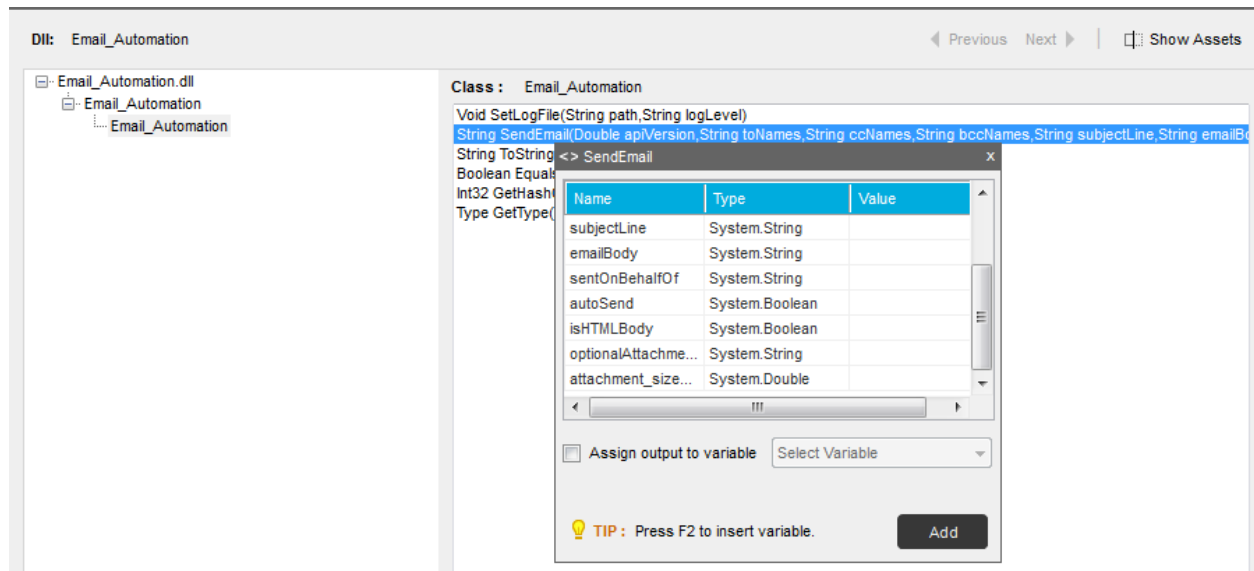
b) SendEmail (…)

This method performs the logic to send email though already configured outlook profile in the VDI. The parameters of the method are illustrated in the image below:

3.2   Email_Automation MetaBot Logic

The Email_Automation Metabot Logic has required exception handling at MetaBot level and defines the input and output parameters. It internally invokes methods in Email_Automation.dll and sends email. In case of any error, it will be logged in the log file.

Input / Output parameters (SetLogFile())

Name	Type	Mandatory/Optional	Description
path	Input	Mandatory	Contains the location of the log file including the file.
logLevel	Input	Optional	Required logging level. Can have any of following 4 values: DEBUG,INFO,WARNING and DIAG. The default value is **DEBUG**.

Input / Output parameters (SendEmail())

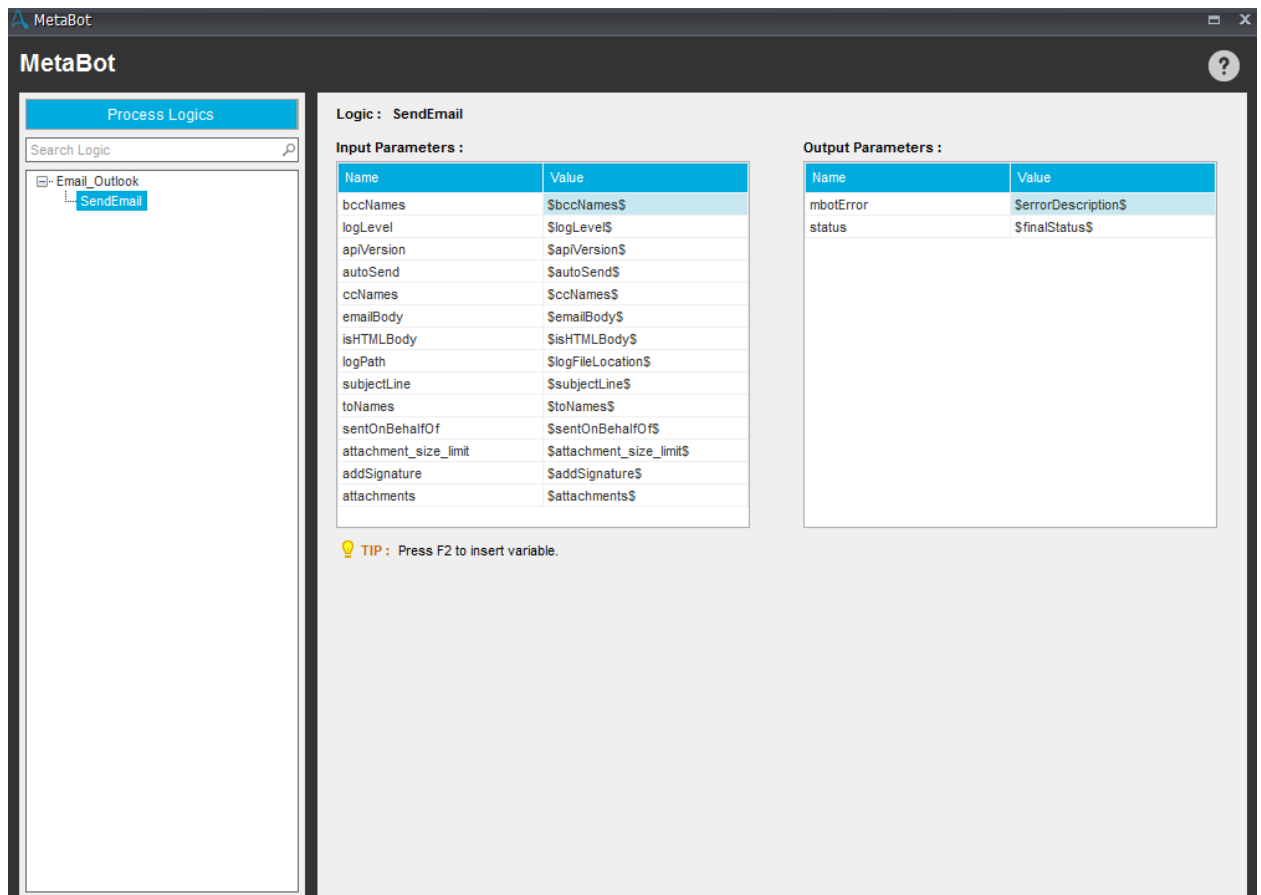| Name	Type	Mandatory/Optional	Description
apiVersion	Input	Mandatory	For this version of metabot, apiVersion should always be 1.0
toNames	Input	Optional (At least one of these three fields should have a destination address)	SOE IDs/Email Ids to be used in "To" address field, separated by semicolon(;)
ccNames	Input		SOE IDs/Email Ids to be used in "CC" address field, separated by semicolon(;)
bccNames	Input		SOE IDs/Email Ids to be used in "BCC" address field, separated by semicolon(;)
subjectLine	Input	Optional	Subject text
emailBody	Input	Mandatory	Email content
sentOnBehalfOf	Input	Optional	SOE ID of the user on behalf of whom the email has to go out. Note: The bot Id should be an authorized delegate in "onBehalfOf" user's outlook profile. Otherwise, below exception will be thrown: ***"System.UnauthorizedAccessException: You do not have the permission to send the message on behalf of the specified user"***
autoSend	Input	Optional	Expects Boolean (true/false) value. True - Email will be composed and sent. False/any other value - Email will be composed and kept in draft **Default value is true**

isHTMLBody	Input	Optional	Expects Boolean (true/false) value. True - Email body will be formatted as HTML. False/any other value - Email body will be formatted as plain text. **Default value is true**
attachments	Input	Optional	Path to the files to be attached, if any. Note: In case of multiple files, paths should be separated by semicolon{;}
attachment_size_limit	Input	Optional	value <= 15. **Default limit is 10mb.** If the actual file size exceeds the limit, below exception will be thrown: *The file you're attaching is bigger than the allowed limit. current file size is: {actual size}, and the limit is:{ attachment_size_limit }"*
addSignature	Input	Optional	Expects Boolean (true/false) value. True – signature (with bot ID and VDI name) will be appended to emailbody. False/any other value – No signature will be appended **Default value is true**
status	Output		Denotes the process status - SUCCESS/FAIL
mbotError	Output		Returns reason for failure. Value will be empty if the process is successful.

4. Task Bot Component

SendEmail_Outlook Task Bot Component (*Automation Anywhere\My Tasks\Common\ Email_Outlook\ SendEmail_Outlook.atmx*) can be used by the end user as a template. It demonstrates how the MetaBot can be used in the task. Additionally, it has the ability to read a configuration file, log the required information, use retry logic, if necessary.

The end user has to copy this task and customize as required. Variables should be populated and passed on to metabot as shown below:

4.1 Configuration file

The SendEmail_Outlook.atmx task requires a configuration file in order to send email. The configuration file has a XML format and contains all the necessary data in order to invoke the Email_Outlook MetaBot properly. Also, it contains data related to logging and retry functionality.

By default, the configuration file (config.xml) is located under: "*Automation Anywhere\ My Docs\CommonDocs\ Email_Outlook*".

Default content of the config.xml file:

config.xml

Note: Developers can bypass the config file by populating variables directly in the task bot.

4.2 Logging

There are three types of logging - On the Email_Automation.dll, MetaBot level and SendEmail_Outlook task level. All necessary information are logged in the same log file. The path to the log file is specified in the configuration file "/logger/location". The specified path must exist in the system. If the path exists, but there is no specific folder, the folder and log file will be created automatically.

It is also possible to specify the log level. There are 4 types of log level. INFO, WARNING, DEBUG and DIAG. DIAG means diagnostic. Default log level is DEBUG.

5. Email_Outlook Component Installation steps

1. Import Email_Outlook metabot
2. Put config.xml configuration file in some directory under My Docs folder
3. Copy SendEmail_Outlook.atmx to LOB specific folder and customize it.
4. Modify SendEmail_Outlook.atmx with input parameters
5. Update configuration file (config.xml) sections with a project specific information:

6. Technical Support

For any technical assistance with Email_Outlook.mbot integration, raise INC in ServiceNow with all relevant details, assign it to AA STE L3 support and send email to AA STE team with INC#. Below are the Service Now/DL details:

- ServiceNow URL: https://servicemanagement.citigroup.net/navpage.do

- ServiceNow Group: **ICG GL AD ISG STE AA L3 SUPPORT**

- Incident Template: **ITMP0000049753**

- Group Email DL: ***GT GLOBAL STE AA**