

### 1. Overview

Xapity Mail can send email directly from the Service Manager console. It does not require an email client, like Outlook, to be installed. Xapity Mail uses Service Manger Notification Templates to fill in details of the job in the email.

### 2. Prerequisites for Xapity Mail

- Configure the default Service Manager E-mail Notification channel.
  - Support for **Anonymous Authentication**
  - Refer to the full administration guide for information on **Integrated authentication**
- Notification Templates
- Analysts must exist as Service Manager Configuration Items.

### 3. Installation

#### Import Management Packs

Import the following:

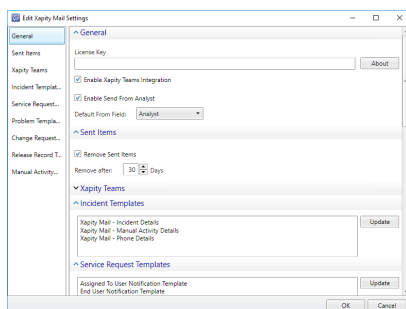
- Xapity.Mail.Library.mpb
- Optional:
  - Xapity.Mail.Sample.Notifications.xml
  - Dictionaries eg Xapity.Mail.ExtendedDictionaries.cs-CZ.mpb

#### Copy Workflow dll

Copy the Xapity.Mail.Workflow.dll to the install folder on the Workflow Server.  
Restart the “Microsoft Monitoring Agent” service

#### Set Permissions for Mail Class

Write Permissions are required on the new mail class, add permissions to the Mail class by running Xapity.Mail.Permissions.Add.exe



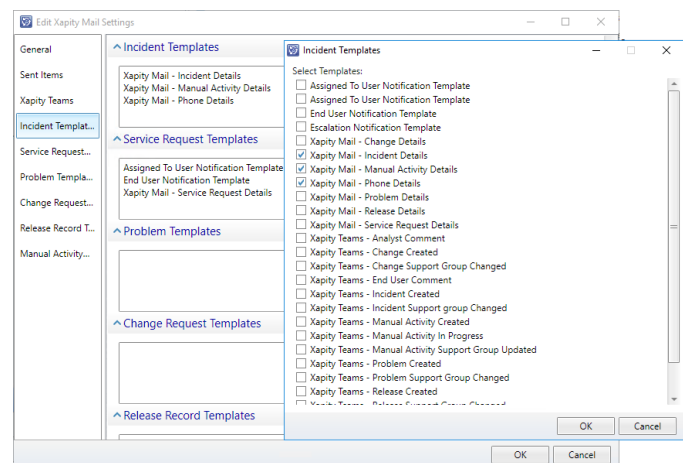
### 4. Configuration of Xapity Mail From Address

The email From address can be set to one of the following:

- Notification Channel email address
- Current User: Requires “Enable Send From Analyst” to be checked.
- Work Item Support Group: use a shared email address if Xapity Teams is integrated and configured.

#### Templates

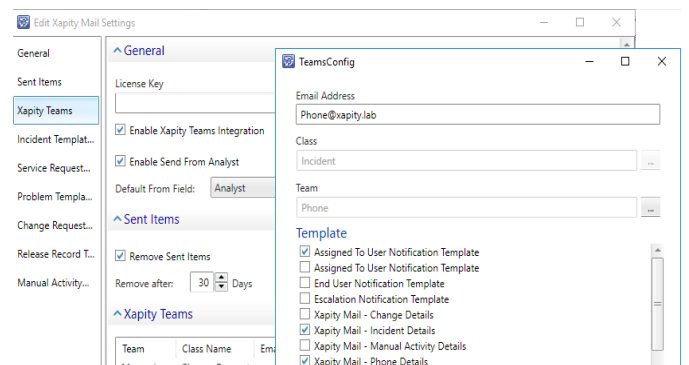
On each major Work Item type you can select which Templates will be available to Analysts when they use the Send Email console task.



### 5. Xapity Teams Integration

Enabling integration with Xapity Teams will allow you to:

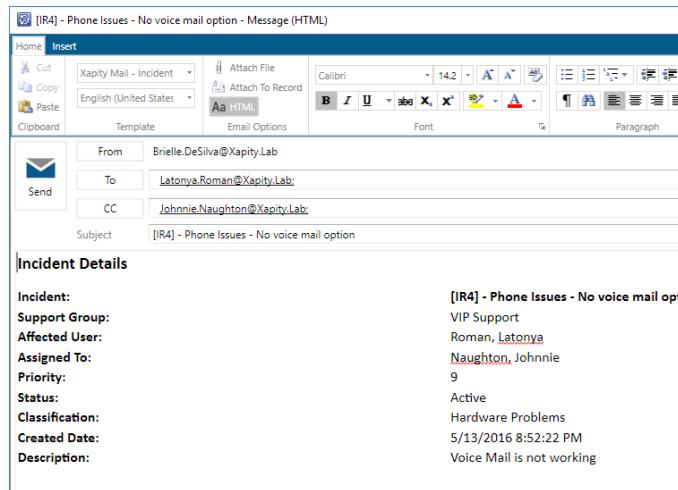
- Send from a shared mailbox email address
- Set specific Team Templates





## 7. Send Email Task

Send Email task is available for major Work Items – Incident, Change Request, Release Record, Problem, Service Request and Manual Activity.



### “From” Field

The default is set by the administrator. But this can be changed by the analyst (if other email addresses have been enabled).

### “To” Field

Will display users related to the work item such as:

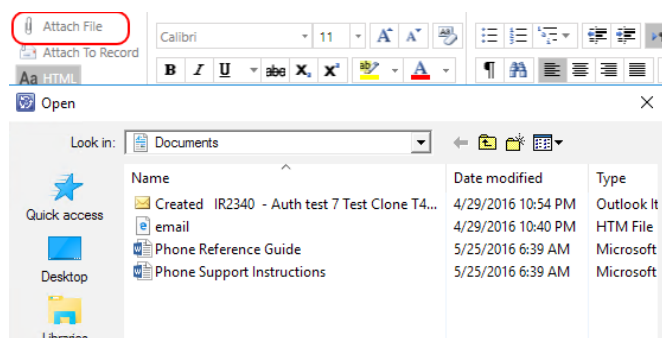
- Affected user
- Assigned to User
- Created by User
- Primary Owner

### Other User

Allows the analyst to choose any user that is in the Service Manger Configuration Items database.

### Attachments

The analyst can add attachments to the email.

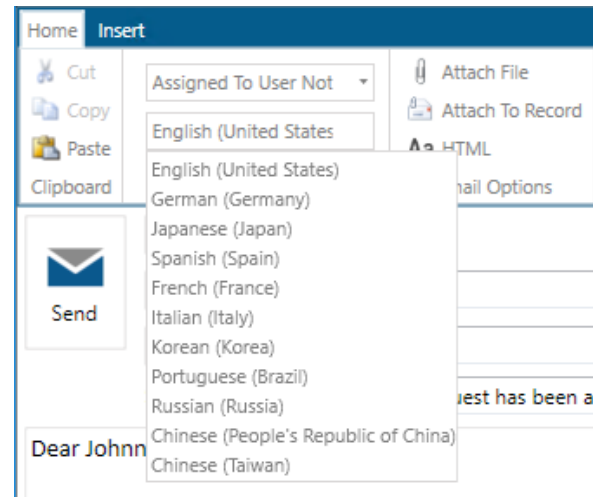


## Templates

The analyst can choose a template and details from the work item will automatically be inserted into the Subject and Body of the email.

## Template Language

Notification Templates that support multiple languages allow the analyst to choose the language to send to the user(s).



## 8. Language Support and Overrides

We have also provided a language override function that can fix any translation errors or add any additional language supported by Service Manger.

Edit the unsealed management pack **Xapity.Mail.ExtendedLanguages.xml** to add the additional language or override and then import into Service Manger.

## 9. Queues

If using queues, import the management pack **SMTPChannelConfigurationItemGroup.xml** and allow each User Role access to the “SMTP Channel Configuration Item Group”

## 10. Further Information

Please refer to the following guides on the Xapity website:

- Xapity Clone
- Xapity Teams
- Xapity PowerShell
- Xapity Blogs