## Setting up e-mail service for RBA

Configure Administrator so that RBA can send e-mail messages using your mail server.

- If you have InSite, you must first configure IIS and any firewall that may exist on your system.
- You must know the following information about the mail server that sends e-mail messages for your company:
  - $^{\circ}~$  The mail server's name or IP address
  - $^{\circ}~$  The mail server's SMTP port
  - What type of authentication it uses
- If the server that is sending e-mail has McAfee VirusScan software, configure the VirusScan software to allow AutomationApp.exe to use port 25 to send outbound e-mail. For instructions, see the McAfee documentation.
- 1. On the Prinergy primary server, in Administrator, select **Tools** > **Configure RBA**.
- 2. In the **Email Server** box, type the name or IP address of the mail server.
- 3. If the mail server uses a port other than 25 for SMTP communication, type the port number in the **Email Server Port** box.
- 4. In the **Login** area, enter authentication settings:
  - If the mail server allows anonymous connections, keep the **Authentication** list set to **Anonymous**.
  - If the mail server requires basic authentication, in the Authentication list, select Basic (clear text), and complete the Login area to identify the name and password of the authenticated user account that RBA will use to send e-mail messages. Keep in mind that basic authentication stores the user name and password in the e-mail message as clear text, allowing hackers to detect the user name and password as the message travels over the Internet.
  - If the mail server requires Integrated Windows Authentication, in the **Authentication** list, select **NTLM**. (NTLM stands for Windows NT LAN Manager, the Microsoft Windows NT operating system Challenge/Response authentication protocol.)
- 5. If you want RBA e-mail messages to be sent from a specific e-mail address, rather than the default address <u>automation@prinergy.com</u>, type the address in the **'From' Parameter Default** box.
- 6. Send a test message with RBA to make sure e-mail is set up correctly:
  - a. Click Test.
  - b. Enter your e-mail address.
  - c. Click Send Test E-mail, click Close, and click OK.
  - d. Check your e-mail messages to make sure that you received the message from RBA.

**Note:** Even if you receive the test message, RBA e-mail is not set up until you perform the next step.

- 7. Restart the Rule Engine daemon:
  - a. Open Windows Task Manager.
  - b. Click the **Processes** tab.
  - c. Click the **Image Name** column label to sort items alphabetically by name.
  - d. Right-click WebServerApp.exe, and select End Process. Click Yes to confirm.
  - e. Right-click AutomationApp.exe, and select **End Process**. Click **Yes** to confirm. In 30 seconds, the RBA engine restarts automatically.

Test the e-mail setup with an actual rule set.
For example, create a rule set in which the Manual Trigger event starts the Email action that sends you a message.

If you changed the default e-mail address for RBA, the new address takes effect on each client computer only after Workshop is restarted. All other changes take effect immediately.