

2024

RT Project Email Setup Guide

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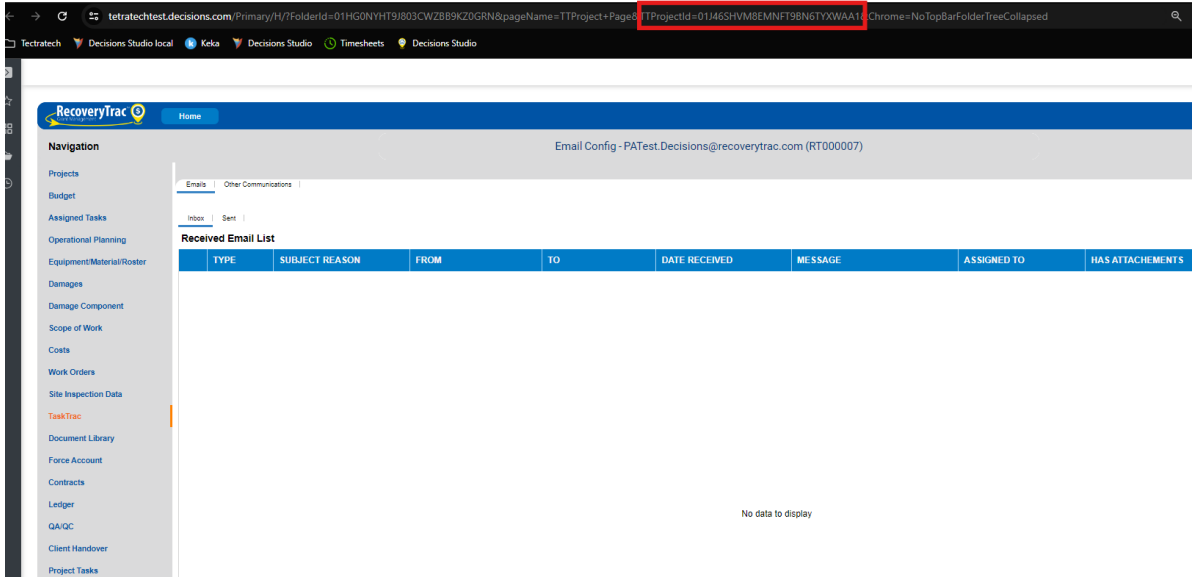
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Guide to Setup Email to RTProject

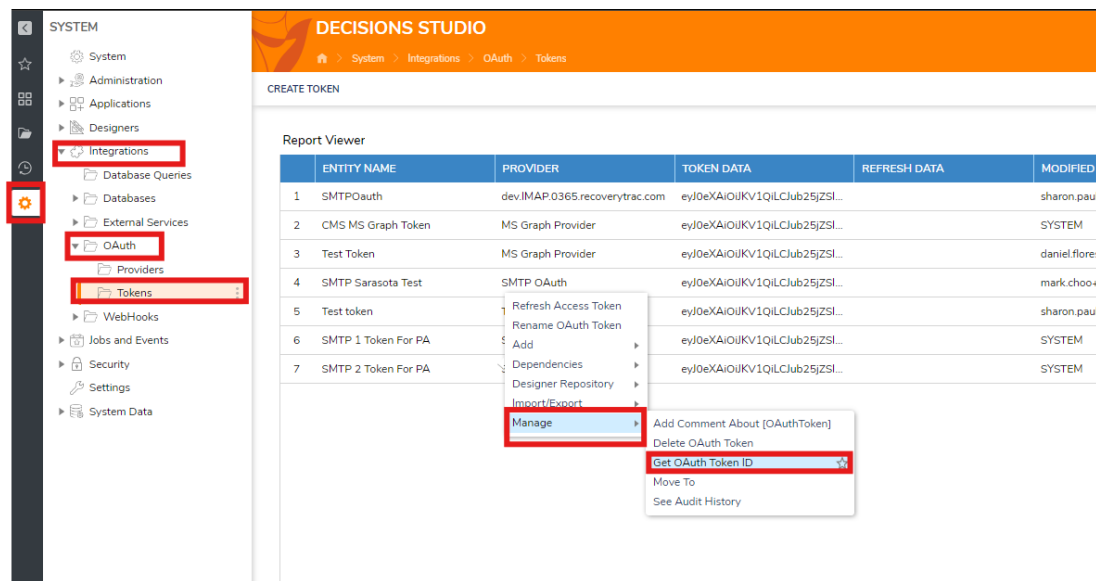
This document provides a detailed, step-by-step guide for configuring emails to different RT projects.

Prerequisites

1. RT Project ID - Copy the RTProject Ids you need to setup the emails for. You will find the RTProject Id in the URL of the Project Details page.



2. SMTP Token ID – Go to settings tab → Integrations → OAuth → Tokens and right click the newly created token and hover on Manage → Get OAuth Token ID



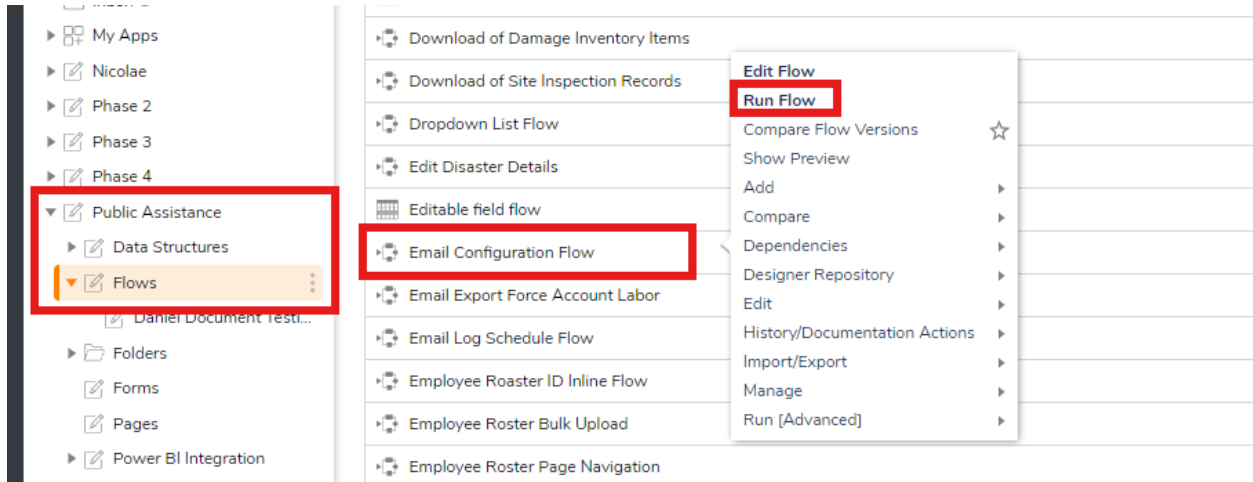
3. Email address – Copy the mailbox address which you want to add to the project.

Procedure

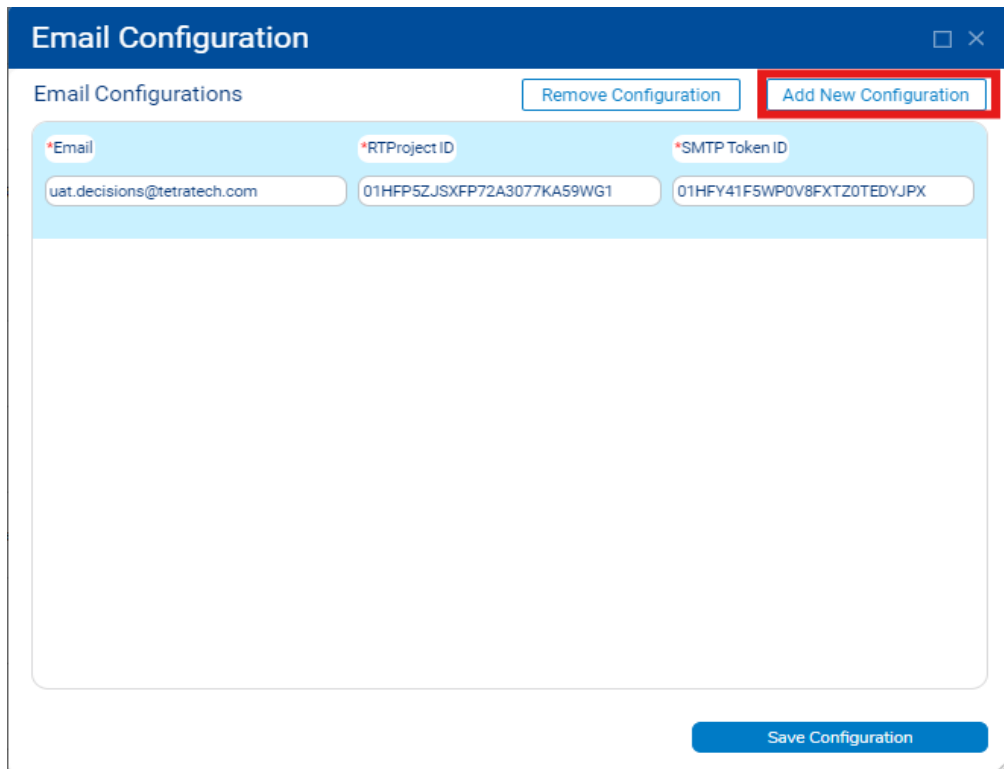
Step 1

Go to Public Assistance (designer project) → Flows and find the flow “*Email Configuration Flow*”.

Flow ID:” 01J4RTP0QZW6AX6W3FNVRW80FS” Right click on the flow and click on “Run flow” option.



After running the flow, you will see the below form click on add new configuration

A screenshot of a web form titled 'Email Configuration'. The form has a blue header bar with the title and window controls. Below the header, there are three input fields: '*Email' with the value 'uat.decisions@tetratech.com', '*RTProject ID' with the value '01HFP5ZJSXFP72A3077KA59WG1', and '*SMTP Token ID' with the value '01HFY41F5WP0V8FXTZ0TEDYJPX'. Above the input fields are two buttons: 'Remove Configuration' and 'Add New Configuration', with the latter highlighted in red. At the bottom right of the form is a blue 'Save Configuration' button.

Please provide the necessary details in the form below and click on “Save Configuration” button below.

The screenshot shows a web application window titled "Email Configuration". At the top, there are two buttons: "Remove Configuration" and "Add New Configuration". Below these, there are three input fields with labels: "*Email" (containing "uat.decisions@tetrattech.com"), "*RTProject ID" (containing "01HFP5ZJSXFP72A3077KA59WG1"), and "*SMTP Token ID" (containing "01HFY41F5WP0V8FXTZ0TEDYJPX"). A red rectangular box highlights a second set of these three input fields, which are currently empty. At the bottom right of the form, there is a blue button labeled "Save Configuration".

We have now successfully setup email for fetching the emails from the mailbox to Decisions.

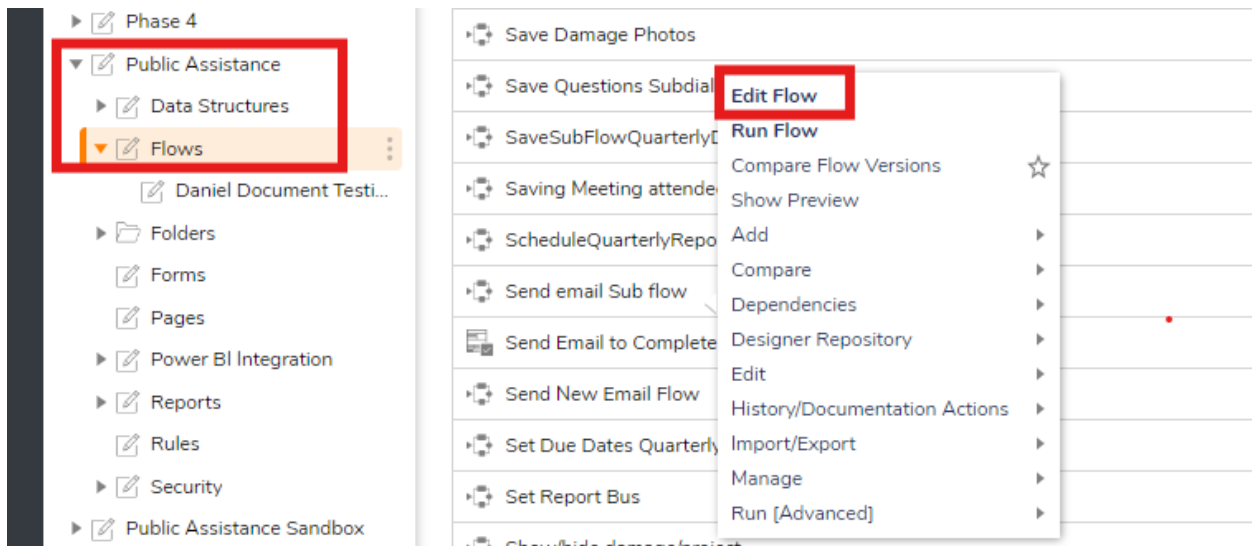
Now in the next steps we will configure for sending an email.

Step 2

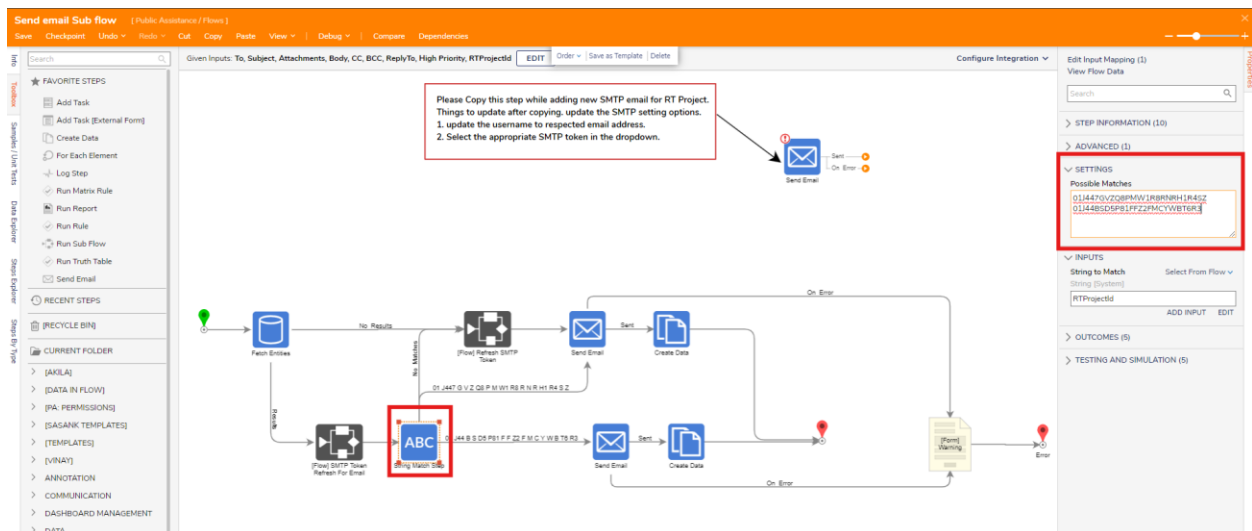
This is the step which needs deployment to higher versions. The change needs to happen in the dev environment.

Go to Public Assistance (designer project) → Flows and find the flow “Send email Sub flow”.

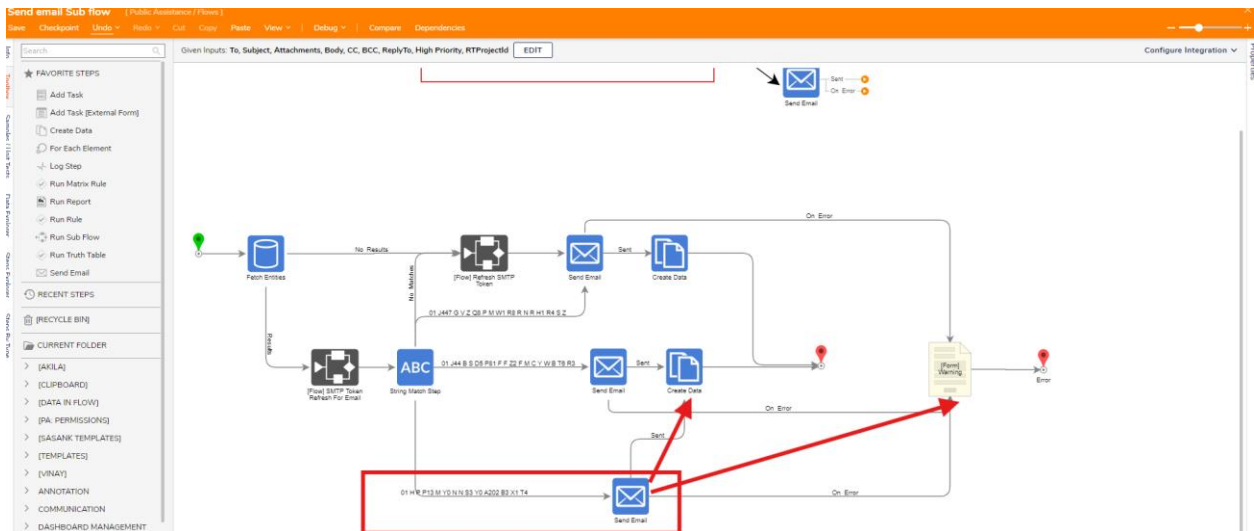
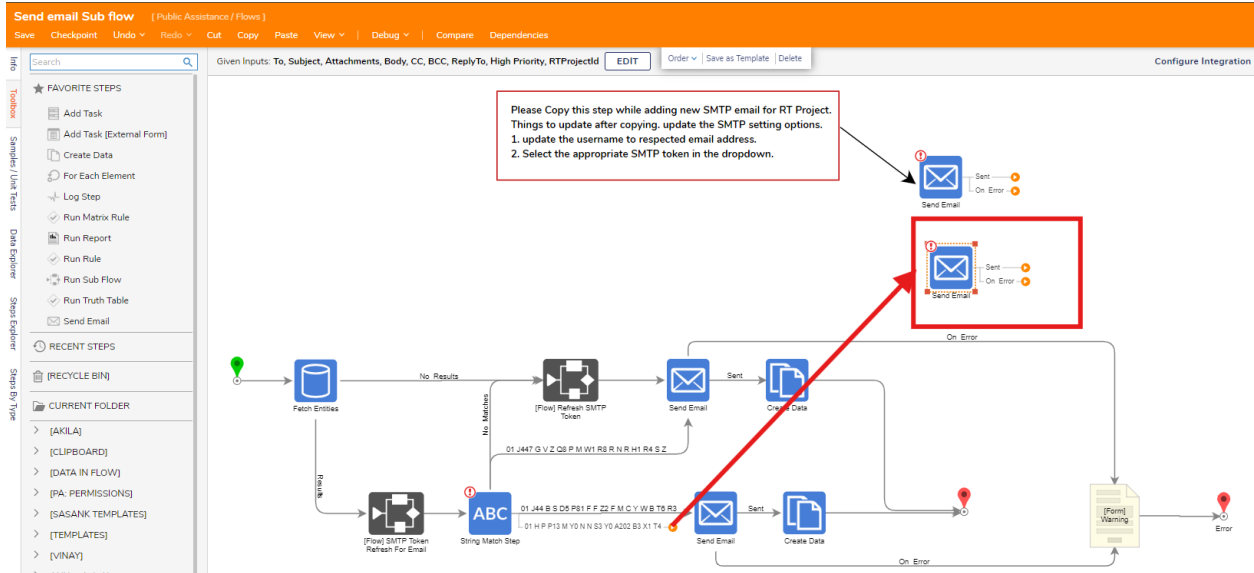
Flow ID:” 01HPP13MY0NNS3Y0A202B3X1T4” Right click on the flow and click on “Edit flow” option.



You will see the flow open up click on the “String match step” which is highlighted below and on the right-hand side you will see a list box which is also highlighted below paste the SMTP Token ID you have copied before in that list box.



Upon pasting you will see new path in the string match step. Just copy (ctrl C and ctrl V) the above “Send Email” step which is highlighted in the below screenshot. Drag the newly created path and set it to the copied “Send Email” step and connect the sent path to “Create Data” step and connect the “On Error” path to the form.



Step 4

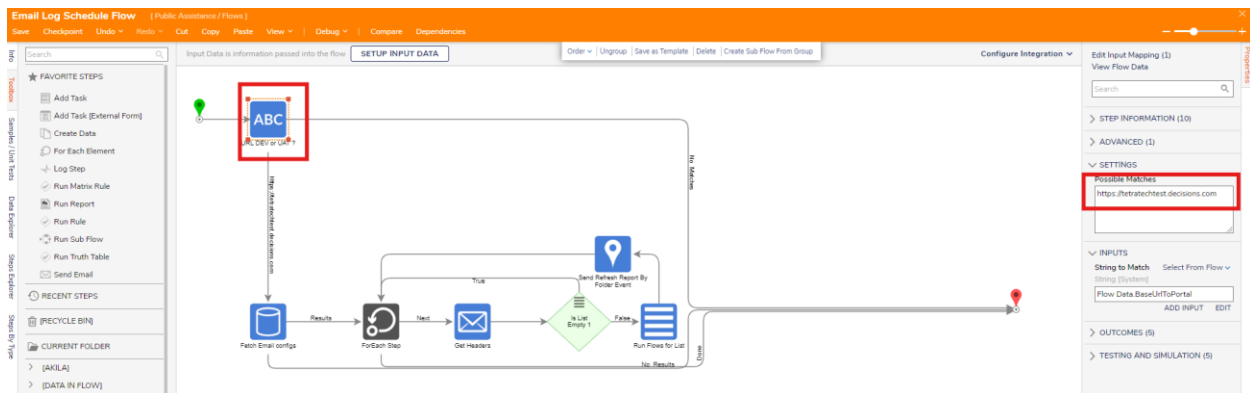
Note: Below changes should be made when you want to configure the mailboxes to the production environment. This is a one-time activity per environment.

There is a scheduled Job which runs every 4 minutes to fetch new emails to respective mailbox to create records in decisions.

Go to Public Assistance (designer project) → Flows and find the flow “*Email Log Schedule Flow*”.

Flow ID:” 01J3FED1BW96BN0M8G3GF9S9X2” Right click on the flow and click on “Edit flow” option.

Click on the string match step and replace the test environment url with url of the production environment. You can refer to the below screenshot.



Upon replacing you will see a new path at the string match step just connect the path to the fetch email configs step like shown below. Save the flow and deploy it to the higher environments until it reached the prod environment. Go ahead and double check the flow in the prod environment to see whether the change has been updated or not.

