

# EmailEventHandler

v8.0.1.136

**Relativity® 10.3 & above, RelativityOne**

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## What is Email Event Handler?

**Email Event Handler** is a per workspace application, which provides the ability of configuring Email Templates, which act as subscriptions for sending email notifications from a Relativity object's layout, including data from the object and its ancestry.

## Deployment

Depending on the strategy, follow the steps below:

### Upgrading from a previous version

- Log into Relativity.
- Navigate to the Admin page.
- Navigate to the **Application Library** tab.
- Click on the **Upload Application** button.
- Click on the **Browse...** button for the Application File field.
- Find the **RA\_Email\_Event\_Handler.rap** (installer) file and click **Open**.
- Click the **Save** button.

*Note: **Migration Handlers Component** is responsible for moving the values from the legacy “Object Name” & “Layout Artifact ID” fields to the newly added “Object” & “Object Layout” fields during an upgrade from version/s 8.0.0.X to 8.0.1.X.*

*Note: **Migration Handlers Component** is responsible for moving the values from the legacy **Send Email Trigger** field to the newly added “Send Email Trigger Condition” object during an upgrade from version/s 8.0.0.X/8.0.1.14 to 8.0.1.54.*

### Performing a clean installation

- Log into Relativity.
- Navigate to the Admin page.
- Navigate to the **Application Library** tab.
- Click on the **Upload Application** button.
- Click on the **Browse...** button for the Application File field.
- Find the **RA\_Email\_Event\_Handler.rap** (installer) file and click **Open**.
- Click the **Save** button.
- In the Workspaces Installed section, click on the **Install** button.
- In the Workspaces section, click the ellipsis (...) button.
- In the popup window, select the desired workspace(s) and click the **Ok** button.
- Click the **Save** button.

## SMTP Configurations

In order to be able to send/receive email notifications via Email Event Handler, an SMTP server is required. The Email Event Handler application has an **SMTP Configurations** tab, where the SMTP settings could be configured:

1. Navigate to **Email Event Handler** tab -> **SMTP Configurations** tab.
2. Click on the **New SMTP Configuration** button.
3. Depending on the type of configuration:

- **Instance Settings Configuration**

For this configuration type, the SMTP credentials are retrieved from the **Relativity Instance Settings**. The appropriate instance setting section and keys need to be set, so the values could be read according to them.

The screenshot shows the 'SMTP Configuration Layout' interface. At the top right, there are buttons for 'Edit', 'Delete', 'Back', 'Edit Permissions', and 'View Audit'. The main content area is titled 'SMTP Configuration' and contains the following fields:

- Name: Instance Settings Configuration
- Type: Instance Settings
- Smtp Server Key: SMTPServer
- Smtp Username Key: SMTPUserName
- Smtp Password Key: SMTPPassword
- Smtp Port Key: SMTPPort
- Requires SSL Key: SMTPSSLisRequired
- Instance Settings Section: kCura.Notification

- **Secret Store Configuration**

In this configuration type, the Email Event Handler utilizes **Relativity's Secret Store** to store the SMTP credentials. Once the fields on the layout have been filled and saved, they will be used to automatically create a **Relativity Secret**, which will be bound to the dedicated path.

The screenshot shows the 'SMTP Configuration Layout' interface for a Secret Store Configuration. At the top right, there are buttons for 'Save', 'Save and New', 'Save and Back', and 'Cancel'. The main content area is titled 'SMTP Configuration' and contains the following fields:

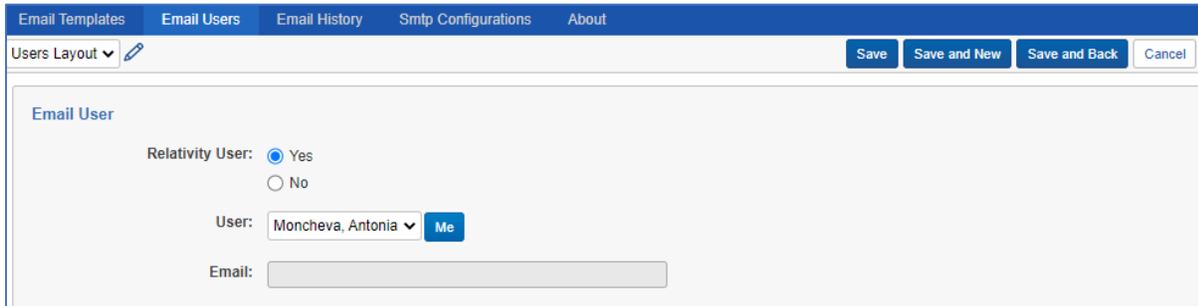
- Name: Secret Store Configuration
- Type: Secret Store
- Secret Store Path: EmailEventHandler/Smtp
- Smtp Server: smtpserver.tsd.com
- Smtp Username: smtpuser\_tsd
- Smtp Password: .....
- Smtp Port: 45
- Smtp SSL Required:
- For example: "EmailEventHandler/Smtp"

**Note:** Keep in mind, that different **Secret Store Paths** must be used for separate configurations to avoid overriding. Once saving the SMTP configuration, the credentials will be automatically saved in the encrypted **Relativity Secret Store** and deleted from the object's layout.

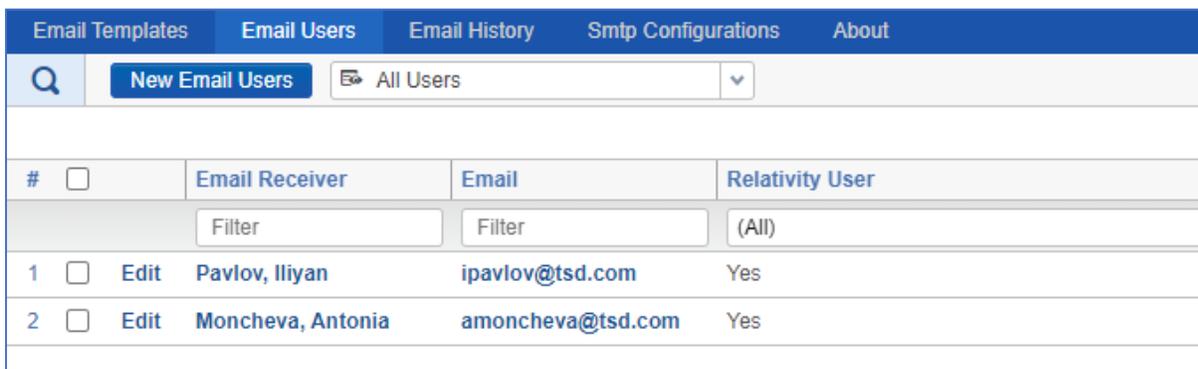
## Email Users

In order to use **Relativity Users** to send/receive email notifications via Email Event Handler, the desired users must be created as **Email Users**, so they could be used in **Email Templates** later:

1. Navigate to **Email Event Handler** tab -> **Email Users** tab.
2. Click on the **New Users** button.
3. Set “**Relativity User**” field to **Yes** in order to see the available Relativity Users for the workspace.
4. Select desired Relativity workspace user.



- *When the email user object is saved, the email address will be populated automatically.*



| # | Email Receiver                         | Email             | Relativity User |
|---|--|-------------------|-----------------|
| 1 | <a href="#">Edit</a> Pavlov, Iliyan    | ipavlov@tsd.com   | Yes             |
| 2 | <a href="#">Edit</a> Moncheva, Antonia | amoncheva@tsd.com | Yes             |

**Note:** Only users, which are part of at least one of the workspace’s user groups will be displayed in the **User** dropdown field of the **Email Users** object.

In order to use **non-Relativity Users** to send/receive email notifications via Email Event Handler, the desired users must be created as **Email Users**, so they could be used in **Email Templates** later:

1. Navigate to **Email Event Handler** tab -> **Email Users** tab.
2. Click on the **New Users** button.
3. Set “**Relativity User**” field to **No** in order to create a non-Relativity user as a recipient.

- *When the email user object is saved, the created non-Relativity user will appear in the list of recipients.*

| # | <input type="checkbox"/> |        | Email Receiver    | Email             | Relativity User |
|---|--------------------------|--------|-------------------|-------------------|-----------------|
|   |                          | Filter | Filter            | (All)             |                 |
| 1 | <input type="checkbox"/> | Edit   | Pavlov, Iliyan    | ipavlov@tsd.com   | Yes             |
| 2 | <input type="checkbox"/> | Edit   | Moncheva, Antonia | amoncheva@tsd.com | Yes             |
| 3 | <input type="checkbox"/> | Edit   | External User     | user@test.com     | No              |

**Note:** Keep in mind that edited user's details of existing users will be overwritten in the **Default Send Email To Value** field of **Email Template/Scheduled Email Template/View Email Template** layout, once they are saved.

## Application workflow and setup

**Email Event Handler** uses custom defined **Instant Email Templates, Scheduled Email Templates & View Email Templates**, which act as subscriptions to a specific **Object Type & Object's Layout/View**. They are used to configure how emails should be sent, what should they contain and to whom they should be sent. The sections below describe the setup and workflow of the application.

## Configuring an Object Type

Before creating a dedicated **Email Template/Scheduled Email Template** for an **Object Type**, the following must be done for the specific object type:

- *Create the following fields for the **Object Type**:*
  1. **Send Email To** – Multiple Object
    - The field can be named anything.
    - The field name must be unique.
    - Set **Associative Object Type** to **Email Users**.
  2. Add the created field to the layout(s) for the custom object.

**Note:** Multiple sets of the **Send Email To** fields (with unique names) could be created and used in different **Email Templates/Scheduled Email Templates**.

**Note:** If the **Send Email To** field values will be overridden by setting the **Default Send Email** and **Default Send Email To** fields in the **Email Template/Scheduled Email Template**, it is recommended **Send Email To** field NOT to be added to the object's layout. It is only required to be added to the object's layout, when the **Default Send Email** and **Default Send Email To** fields are not set in the **Email Template/Scheduled Email Template**.

**Note:** The following post-save event handlers will be automatically attached to the corresponding object, once a **Instant Email Template/Scheduled Email Template** is saved:

- **TSD.EEH.EventHandlers.SendEmailForCustomObject** if creating an **Instant Email Template**.
- **TSD.EEH.EventHandlers.PostSaveEventHandlers.CheckConditionsForScheduledCustomObjectPostSaveEH** if creating a **Scheduled Email Template**.

**Note:** Both post-save event handlers can be attached to the same object at once.

## Instant Email Templates

**Instant Email Templates** provide the ability of sending email notifications once a pre-set condition is met in a selected Object's layout.

Please, follow the steps below to create an **Instant Email Template**:

1. Navigate to **Email Event Handler** tab -> **Instant Email Templates** tab.
  2. Click on the **New Instant Email Template** button.
- *Enter the following under the **Custom Object Information** category:*
    - **Object** – Choose the **Relativity Object Type**, to which the subscription should be bound.
    - **Object Layout** – Choose the desired **Layout** of the above selected **Object Type**, in which the subscription should be triggered.
    - **Object Indicator Character**– This field allows users to customize the object indicator, if necessary. When left blank, the default the object indicator is the symbol **colon ':'**. This optional field is available to give users the ability to use placeholders (see section **Placeholders**), that include the default object indicator character.

**Example:**

A user wants to print the value of a field named: "Notes: Doctor". The user must change the object indicator in order to print the field because the field name contains a colon which is the default object indicator. After changing the object indicator to ^, the user is able to print the field in the following manner: <Notes:Doctor>.

- The updated object indicator also allows the field to be printed with the @PrintWholeLayout@ placeholder.
- Updating the object indicator will require any placeholders, that were using the previous object indicator in the template to be updated to use the new value.

| Placeholders with Default Object Indicator | Placeholders with Customized Object Indicator |
|--|---|
| <parent:>                                  | <parent^>                                     |
| <parent:name>                              | <parent^name>                                 |
| <child:>                                   | <child^>                                      |
| <child:childObject:name>                   | <child^childObject^name>                      |
| <objectField:responsive>                   | <objectField^responsive>                      |

- **Default Send Email Value** – To override the **Send Email Trigger Condition** object, set the **Default Send Email Value** field's value. If **Yes** is selected, an email will be sent each time the object is saved, regardless of what condition is set to the selected trigger field in the **Send Email Trigger Condition** object. If **No** is selected, an email will not be sent regardless of what is set in the **Send Email Trigger Condition** object. If the value of **Default Send Email Value** field is not set (NULL), an email will be sent according to the selected trigger condition.
- **Send Email To Field** – The Multiple Object field located on the layout of the selected **Object Type** (not the **Email Users** object). This field's value will determine the list of email recipients.

**Note:** We recommend creating different Multiple Object field for each template type.

- **Default Send Email To Value** – To override the **Send Email To Field**, set the **Default Send Email To Value** field's value. When this field is set, the email will be sent to the users who are selected regardless of what is set in the **Send Email To** Field on the layout.
- **Default Values Behavior** – To select the option of appending more users as recipients select "Users Append Defaults". To select the option of overriding the **Default Send Email To** value, select "Users Override Defaults". To select the option of using the values of **Default Send Email To** field select "Always Use Defaults".
- **Send File Fields as Attachments** – determines whether files in File fields should be sent as attachments in the email.

- **Save Email History** – determines whether to keep track of history emails for this particular template. Setting this to **Yes** will result in saving each email sent from this template in the **Email History** tab.

**Custom Object Information**

Object: Document Clear

Object Layout: Default Clear

Object Indicator Character: &

Send Email To Field: Send Email To Clear

Default Send Email Value:  Yes  No

Default Send Email To Value: amoncheva@tsd.com Clear

Default Values Behavior: Always Use Defaults

Send File Fields as Attachments:

Save Email History:

- Enter the following under the **Email Information** category:
  - **Name** – Descriptive name of the **Instant Email Template**.
  - **Email From** – The email address, from which the email will be sent.
  - **Send Email From Logged in User** – To have the email sent from the user who is saving the object, set this field to *Yes*. To have the email sent from the email address specified in the Email From field, set this field to *No* or do not set this field.
  - **Email Subject** – The subject of the email message.
  - **Email Body** – The body content of the email message.

*Note: The **Email From** field cannot be set, if the **Send Email From Logged in User** field is set to **Yes**.*

**Email Information**

Name: Document Object Email Template

Email From:

Send Email From Logged in User:  Yes  No

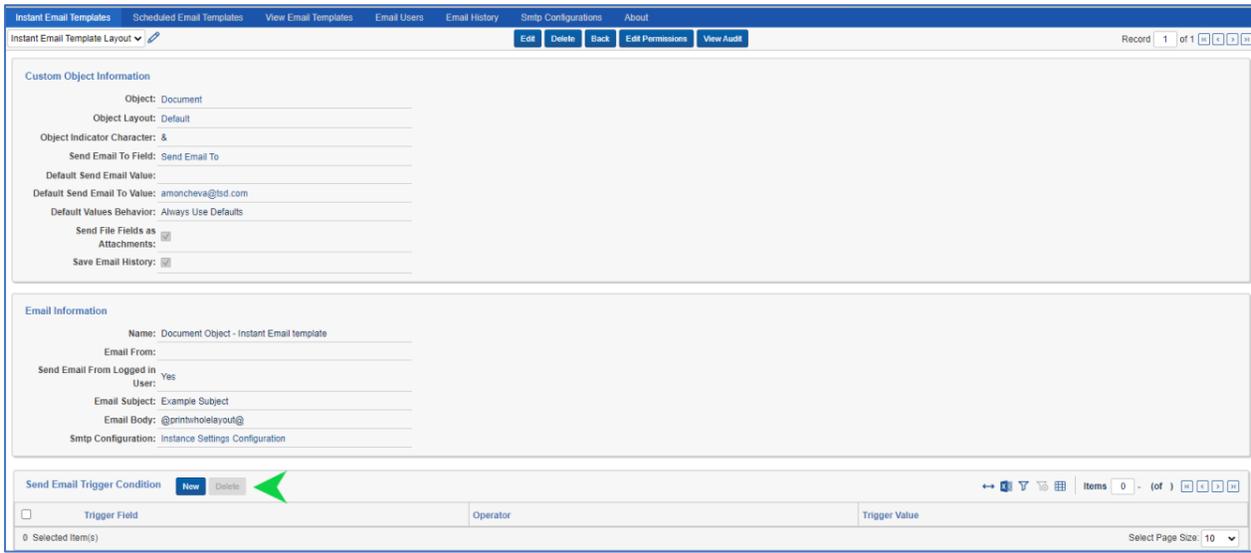
Email Subject: This is a test subject

Email Body: @printwholelayout@

SmtP Configuration: Instance settings configuration Add

Note: Different placeholders (e.g., @printwholelayout@) could be used in the email subject/body, when configuring an **Instant Email Template**. These placeholders are used to extract certain parts of information from the object being edited (or its ancestry). Please, refer to [Supported placeholders'](#) section for full details on the available placeholders.

- Once the **Instant Email Template** is saved, the **Send Email Trigger Condition** category will be visible and users will be able to set a condition, associated with a field, which belongs to the selected Object in the **Object** field, as a trigger for sending email notifications:



Note: Different field types can be used as a trigger, by configuring the **Send Email Trigger Condition**. Please, refer to [Supported Trigger Fields](#) for full details on the available fields and conditions.

Note: Only one **Send Email Trigger Condition** is allowed per **Instant Email Template**.

## Scheduled Email Templates

**Scheduled Email Templates** provide the ability of sending email notifications once the pre-set conditions (if any) are met, the trigger condition is applied to the object and the selected offset in days is reached.

Please, follow the steps below to create a **Scheduled Email Template**:

1. Navigate to **Email Event Handler** tab -> **Scheduled Email Templates** tab.
2. Click on the **New Scheduled Email Template** button.

- Enter the following under the **Custom Object Information** category:
  - **Object** – Choose the **Relativity Object Type**, to which the subscription should be bound.
  - **Object Layout** – Choose the desired **Layout** of the above selected **Object Type**, in which the subscription should be triggered.

- **Object Indicator Character**– This field allows users to customize the object indicator, if necessary. When left blank, the default the object indicator is the symbol **colon** ‘:’. This optional field is available to give users the ability to use placeholders (see section [Placeholders](#)), that include the default object indicator character.

**Example:**

A user wants to print the value of a field named: “Notes: Doctor”. The user must change the object indicator in order to print the field because the field name contains a colon which is the default object indicator. After changing the object indicator to ^, the user is able to print the field in the following manner: <Notes:Doctor>.

- The updated object indicator also allows the field to be printed with the @PrintWholeLayout@ placeholder.
- Updating the object indicator will require any placeholders, that were using the previous object indicator in the template to be updated to use the new value.

| Placeholders with Default Object Indicator | Placeholders with Customized Object Indicator |
|--|---|
| <parent:>                                  | <parent^>                                     |
| <parent:name>                              | <parent^name>                                 |
| <child:>                                   | <child^>                                      |
| <child:childObject:name>                   | <child^childObject^name>                      |
| <objectField:responsive>                   | <objectField^responsive>                      |

- **Default Send Email Value** – To override the **Send Email Trigger Condition** object, set the **Default Send Email Value** field’s value. If **Yes** is selected, an email will be sent each time the object is saved, regardless of what condition is set to the selected trigger field in the **Send Email Trigger Condition** object. If **No** is selected, an email will not be sent regardless of what is set in the **Send Email Trigger Condition** object. If the value of **Default Send Email Value** field is not set (NULL), an email will be sent according to the selected trigger condition.
- **Send Email To Field** – The Multiple Object field located on the layout of the selected **Object Type** (not the **Email Users** object). This field’s value will determine the list of email recipients.

**Note:** We recommend creating different Multiple Object field for each template type.

**Default Send Email To Value** – To override the **Send Email To Field**, set the **Default Send Email To Value** field’s value. When this field is set, the email will be sent to the users who are selected regardless of what is set in the **Send Email To Field** on the layout.

- **Default Values Behavior** – To select the option of appending more users as recipients select “Users Append Defaults”. To select the option of overriding the **Default Send Email To** value, select “Users Override Defaults”. To select the option of using the values of **Default Send Email To** field select “Always Use Defaults”.

- **Send File Fields as Attachments** – determines whether files in File fields should be sent as attachments in the email.
- **Save Email History** – determines whether to keep track of history emails for this particular template. Setting this to **Yes** will result in saving each email sent from this template in the **Email History** tab.
- **Schedule Type** – provides the ability of selecting the desired schedule type.

**Note:** The current version of the application supports only “Offset schedule” type.

- **Offset Value In Days** – determines the number of days for an email to be sent, once a specific trigger condition is covered.
- **Use Date Field as a Trigger** – provides the ability to use a Date field type as a trigger for sending email notifications.

If its value is set to **No** - no additional fields will be loaded and user must select a custom trigger condition, once the layout of the Scheduled Email Template is saved.

If its value is set to **Yes** - the following additional fields load:

- **Date Trigger Field** – provides the ability of selecting custom date field as a trigger.

**Note:** The total of “Date Trigger Field” and “Offset Value in Days” should not represent a date in the past.

- **Use Current Date** – provides the ability of using the current date as a trigger.

➤ Enter the following under the **Email Information** category:

- **Name** – Descriptive name of the **Scheduled Email Template**.
- **Email From** – The email address, from which the email will be sent.
- **Send Email From Logged in User** – To have the email sent from the user who is saving the object, set this field to **Yes**. To have the email sent from the email address specified in the Email From field, set this field to **No** or do not set this field.
- **Email Subject** – The subject of the email message.
- **Email Body** – The body content of the email message.

**Note:** The **Email From** field cannot be set, if the **Send Email From Logged in User** field is set to **Yes**.

**Email Information**

Name: Document Object Email Template

Email From:

Send Email From Logged in User:  Yes  No

Email Subject: This is a test subject

Email Body: @printwholelayout@

Smtp Configuration: Instance settings configuration

**Note:** Different placeholders (e.g., @printwholelayout@) could be used in the email subject/body, when configuring a **Scheduled Email Template**. These placeholders are used to extract certain parts of information from the object being edited (or its ancestry). Please, refer to [Supported placeholders'](#) section for full details on the available placeholders.

- Once the **Scheduled Email Template** is saved, the following categories will be available:
  - **Send Conditions** – providing the ability to add additional conditions to the template. Each one of the conditions must evaluate to *True* in order for the email to be sent.
  - **Custom Trigger Condition** – provides the ability of selecting a custom field as a trigger. The selected field will trigger an email notification once its value equals the preset condition and the offset value in days is reached.

**Note:** “Use Date Field as a Trigger” must be set to **No**, in order to have the ability of creating Custom Trigger Condition object.

**Note:** Different field types can be used as a trigger, by configuring the **Send Conditions** and **Custom Trigger Condition** fields. Please, refer to [Supported Trigger Fields](#) for full details on the available fields and conditions.

## View Email Templates

**View Email Templates** provide the ability of sending email notifications, based on a pre-set schedule interval, once a certain number of records has been added or removed from a Relativity View/Saved Search.

Please, follow the steps below to create a **View Email Template**:

1. Navigate to **Email Event Handler** tab -> **View Email Templates** tab.

2. Click on the **New View Email Template** button.

➤ Enter the following under the **Custom Object Information** category:

- **Object** – Choose the Relativity Object Type, to which the subscription should be bound.
- **Object View ID** – Choose the **View/Saved Search** of the above selected **Object Type**, which will be monitored for this template.
- **Email Recipients** – Select any of the existing email users to determine the list of email recipients.
- **Schedule Type** – Select “Hourly” or “Daily” schedule type to determine email notification’s frequency.
- **Schedule Interval** – Add the desired check interval for the above selected schedule type.

**Example:** In case “Hourly” schedule has been selected, this would be the hourly interval for checking whether the condition has been met. In case “Daily” schedule has been selected, this would be the number of days after which a conditional check should occur.

- **Trigger Condition** – Select the condition, which would trigger an email notification. The following two conditions are currently available: *New Records Added*, *Records Removed*.
- **Trigger Threshold** – Add the number of records that will serve as a threshold and will trigger an email based on the above *Trigger Condition* and *Schedule Interval* selection.

**Example:** In case **Trigger Threshold** has been set to a value of “100” and **Trigger Condition** has been set to “New Records Added”, an email notification will be sent only when the trigger interval has been reached and the difference of items between the last conditional check and the current one is larger than “100”.

**Note:** If **Trigger Threshold** is left blank email recipients will receive notifications for all added/removed items in the selected “Schedule Interval”.

- **Save Email History** - determines whether to keep track of history emails for this particular template. Setting this to **Yes** will result in saving each email sent from this template in the **Email History** tab.

The screenshot shows a web interface for configuring an email template. The top navigation bar includes tabs for 'Instant Email Templates', 'Scheduled Email Templates', 'View Email Templates', 'Email Users', 'Email History', 'Smtp Configurations', and 'About'. The main content area is titled 'View Email Template Layout' and contains a 'Custom Object Information' section with the following fields:

- Object:** A text input field containing 'Document' and a 'Clear' button.
- Object View ID:** A dropdown menu showing 'Saved Search 1'.
- Email Recipients:** A text input field containing 'amoncheva@tsd.com' and a 'Clear' button.
- Schedule Type:** A dropdown menu showing 'Hourly'.
- Schedule Interval:** A text input field containing '2'.
- Trigger Condition:** A dropdown menu showing 'New Records Added'.
- Trigger Threshold:** A text input field containing '100'.
- Save Email History:** A checkbox that is checked.

At the top right of the form, there are buttons for 'Save', 'Save and New', 'Save and Back', and 'Cancel'.

- Enter the following under the **Email Information** category:
  - **Name** – Descriptive name of the **View Email Template**.
  - **Email From** – The email address, from which the email will be sent.
  - **Email Subject** – The subject of the email message.
  - **Email Body** – The body content of the email message.

**Email Information**

Name:

Email From:

Email Subject:

Email Body: 

Hello,  
  
 There were <UpdatedRecordsCount> <ObjectType> objects added to the <ObjectView> saved search and the current total records within it, is now <CurrentRecordsCount> |  
  
 Regards,  
 Y. Nikolov

SMTP Configuration:  Add

**Note:** Different placeholders (e.g., <UpdatedRecordsCount>) could be used in the email subject/body, when configuring a **View Email Template**. These placeholders are used to extract certain parts of information from the object being edited (or its ancestry). Please, refer to [Supported placeholders'](#) section for full details on the available placeholders.

## Supported trigger fields (Instant Email Template and Scheduled Email Template)

| Trigger Field | Available Operators   | Description  |
|---------------|---|--|
| Currency      | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Is Greater Than</li> <li>• Is Less Than</li> </ul> | <p>When <b>"Is"</b> operator is selected an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value in the Currency field, which belongs to the selected Object in the Email Template.</p> <p>When <b>"Is not"</b> operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Currency field, which belong to the selected Object in the Email Template.</p> <p>When <b>"Is Greater Than"</b> operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is less than the value of the</p> |

|         |   |  |
|---------|---|--|
|         |   | <p>Currency Field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Less Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is greater than the value of the Currency Field, which belongs to the selected Object in the Email Template.</p>   |
| Date    | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Is Greater Than</li> <li>• Is Less Than</li> </ul> | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Date field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Date field , which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Greater Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is less than the value in the Date Field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Less Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is greater than the value of the Date Field, which belongs to the selected Object in the Email Template.</p>             |
| Decimal | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Is Greater Than</li> <li>• Is Less Than</li> </ul> | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Decimal field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Decimal field , which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Greater Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is less than the value in the Decimal Field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Less Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is greater than the value of the Decimal Field, which belongs to the selected Object in the Email Template.</p> |

|                     |  |  |
|---------------------|--|--|
| Fixed – Length Text | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Contains</li> <li>• Does Not Contain</li> </ul>                       | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Fixed-Length Text field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Fixed-Length Text field , which belongs to the selected Object in the Email Template.</p> <p>When "<b>Contains</b>" operator is selected an email notification is sent if the added value (in the <b>Trigger Value</b> field) is contained by the Fixed-Length Text field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Does Not Contain</b>" operator is selected an email notification is sent if the added value (in the <b>Trigger Value</b> field) is not contained in the Fixed-Length Text field, which belongs to the selected Object in the Email Template.</p> |
| Long Text           | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Contains</li> <li>• Does Not Contain</li> </ul>                       | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Long Text field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Long Text field , which belongs to the selected Object in the Email Template.</p> <p>When "<b>Contains</b>" operator is selected an email notification is sent if the added value (in the <b>Trigger Value</b> field) is contained by the Long Text field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Does Not Contain</b>" operator is selected an email notification is sent if the added value (in the <b>Trigger Value</b> field) is not contained in the Long Text field, which belongs to the selected Object in the Email Template.</p>                                 |
| Multiple Choice     | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Contains</li> <li>• Does Not Contain</li> <li>• Intersects</li> </ul> | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value(s) (in the <b>Trigger Value</b> field) match(es) the value(s) of the Multiple Choice field which belong(s) to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Multiple Choice field , which belongs to the selected Object in the Email Template.</p>   |

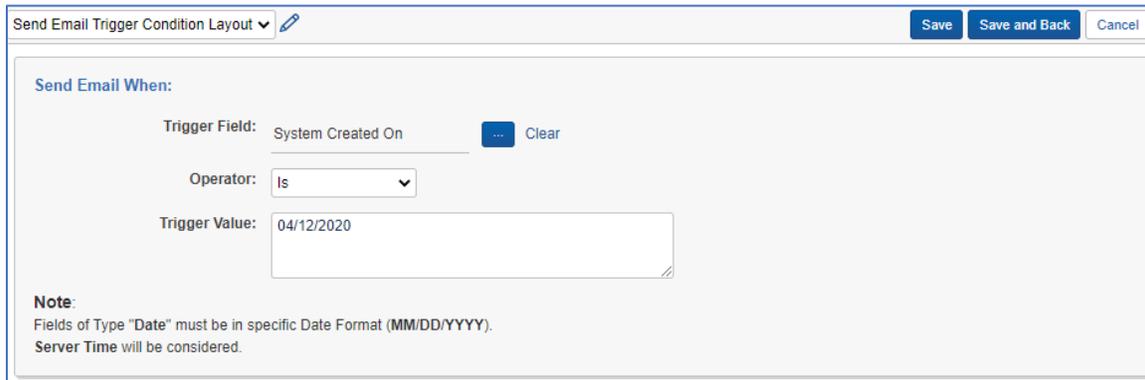
|               |   |  |
|---------------|---|--|
|               |   | <p>When "<b>Contains</b>" operator is selected an email notification is sent if all of the added values (in the <b>Trigger Value</b> field) are contained by the Multiple Choice field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Does Not Contain</b>" operator is selected an email notification is sent if all the added values (in the <b>Trigger Value</b> field) are not contained in Multiple Choice field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Intersects</b>" operator is selected an email notification is sent if at least one of the added values (in the <b>Trigger Value</b> field) matches a value in the Multiple Choice field, which belongs to the selected Object in the Email Template.</p>  |
| Single Choice | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> </ul>  | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Single Choice field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Single Choice field , which belongs to the selected Object in the Email Template.</p>   |
| Whole Number  | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> <li>• Is Greater Than</li> <li>• Is Less Than</li> </ul> | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) matches the value of the Whole Number field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Whole Number field , which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Greater Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is less than the value in the Whole Number Field, which belongs to the selected Object in the Email Template.</p> <p>When "<b>Is Less Than</b>" operator is selected an email, notification is sent if the added value (in the <b>Trigger Value</b> field) is greater than the value of the Whole Number Field, which belongs to the selected Object in the Email Template.</p> |
| Yes/ No       | <ul style="list-style-type: none"> <li>• Is</li> <li>• Is Not</li> </ul>  | <p>When "<b>Is</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field)</p>   |

|  |  |  |
|--|--|--|
|  |  | <p>matches the value of the Yes/No field which belongs to selected Object in the Email Template.</p> <p>When "<b>Is not</b>" operator is selected, an email notification is sent if the added value (in the <b>Trigger Value</b> field) does not match the value in the Yes/No field , which belongs to the selected Object in the Email Template.</p> |
|--|--|--|

*Note: The **Trigger Value** field can be blank (NULL), only when using **Is/Is Not** operators.*

*Note: Only True, False and blank (NULL) values are considered as valid, when **Yes/No** type field is selected as a trigger.*

To create a new trigger condition, navigate to the **Send Email Trigger Condition** layout, under *Email Body* section and click the **New** button. Once the layout is loaded, add the desired field and condition in the corresponding fields:



## Workflow logic

When an **Instant Email Template** exists for the current object and layout being edited, an email will be sent when the **Save/Save & Next** button is clicked, and the following criteria are met:

- The selected **Send Email To Field** is set OR the **Default Send Email To Value** is set.
  - When the **Default Send Email To Value** is set, it will override the value chosen in the **Send Email To Field** on the layout (depending on the **Default Values Behavior** choice).
- The condition set in the Email Template's **Send Email Trigger Condition** is satisfied by the value of the field in the selected Object's layout.

*The email sent will contain the following information:*

- **Email To** – If the **Default Send Email To Value** is set, that email list will be used. Otherwise, the value will be pulled from the **Send Email Trigger Field** currently set on the layout.

- **Email From** – If the **Send Email From Logged in User** field is set to **Yes**, the email will be sent from the user who is currently editing the layout. Otherwise, the value will be pulled from the **Email From** field in the template.
- **Email Subject** – This is pulled from the dedicated **Email Subject** field specified in the template.
- **Email Body** – This is pulled from the dedicated **Email Body** field specified in the template (any placeholders will be replaced with the appropriate content).

When a **Scheduled Email Template** exists for the current object and layout being edited, an email will be sent when the **Save/Save & Next** button is clicked, and the following criteria are met:

- The selected **Send Email To Field** is set OR the **Default Send Email To Value** is set.
  - When the **Default Send Email To Value** is set, it will override the value chosen in the **Send Email To Field** on the layout (depending on the **Default Values Behavior** choice).
- The pre-set conditions (if any) are met, the trigger condition is applied to the object and the selected offset in days is reached.

*The email sent will contain the following information:*

- **Email To** – If the **Default Send Email To Value** is set, that email list will be used. Otherwise, the value will be pulled from the **Send Email Trigger Field** currently set on the layout.
- **Email From** – If the **Send Email From Logged in User** field is set to **Yes**, the email will be sent from the user who is currently editing the layout. Otherwise, the value will be pulled from the **Email From** field in the template.
- **Email Subject** – This is pulled from the dedicated **Email Subject** field specified in the template .
- **Email Body** – This is pulled from the dedicated **Email Body** field specified in the template (any placeholders will be replaced with the appropriate content).

When a **View Email Template** exists for the current object and a selected View of that object, an email will be sent when the following criteria is met:

- The number of records applied in **Trigger Threshold** field is reached in the selected View/Saved Search, based on the **Trigger Condition** field selected action.
- Both above conditions are met during the selected schedule type and schedule interval in **Schedule Type** and **Schedule Interval** fields.

*The email sent will contain the following information:*

- **Email From** –the value will be pulled from the **Email From** field in the template.
- **Email Subject** – This is pulled from the dedicated **Email Subject** field specified in the template
- **Email Body** – This is pulled from the dedicated **Email Body** field specified in the template (any placeholders will be replaced with the appropriate content).

## Supported placeholders (Instant Email Templates and Scheduled Email Templates)

| Placeholder   | Description   |
|---|---|
| @PrintWholeLayout@                                    | Displays an HTML representation of the layout including categories and views.   |
| @fields@  | Displays all the fields on the main object  |
| @link@  | Displays a link to the main object  |
| <FieldName>   | Displays the field value of a field on the main object  |
| <ObjectFieldName:InnerFieldName>                      | Displays the field value of the objects associated with the main objects, object field(Single and Multi object fields supported)  |
| <Parent:>   | Displays the name of the main object's parent object  |
| <Parent:FieldName>                                    | Displays the field value of a field on the main object's parent object  |
| <Parent:ObjectFieldName:InnerFieldName>               | Displays the field value of the objects associated with the main object's parent object, object field(Single and Multi object fields supported)   |
| <Child:>  | Displays the name of all the child objects  |
| <Child:ObjectTypeName:FieldName>                      | Displays the field value of ObjectType child objects of the main object   |
| <Child:ObjectTypeName:ObjectFieldName:InnerFieldName> | Displays the field value of the objects associated with the main object's children of ObjectType, object field(Single and Multi object fields supported)                                |
| <View:1234567>  | Displays an HTML representation of the view denoted by the specified artifactID(e.g. 1234567). The view must exist on the layout that is specified in the email template configuration. |

These examples use the default **Object Indicator Character** which is the *colon* ':' symbol. The *colon* symbol in these examples must be replaced, if a custom **Object Indicator Character** is specified in the **Email Template**.

The screenshot shows the 'Email Templates' configuration interface. The top navigation bar includes 'Email Templates', 'Email Users', 'Email History', 'Sntp Configurations', and 'About'. Below the navigation bar, there are buttons for 'Save', 'Save and New', 'Save and Back', and 'Cancel', along with a 'Record 1 of 1' indicator.

The main configuration area is divided into two sections:

- Custom Object Information:** This section contains several fields:
  - Object:** Set to 'Document' with a 'Clear' button.
  - Object Layout:** Set to 'Default' with a 'Clear' button.
  - Object Indicator Character:** A text input field containing a colon ':' with a green arrow pointing to it.
  - Send Email To Field:** A dropdown menu set to 'Send Email To' with a 'Clear' button.
  - Default Send Email Value:** Radio buttons for 'Yes' and 'No', with 'No' selected.
  - Default Send Email To Value:** A text input field containing 'amoncheva@tsd.com' with a 'Clear' button.
  - Default Values Behavior:** A dropdown menu set to 'Always Use Defaults'.
  - Send File Fields as Attachments:** A checked checkbox.
  - Save Email History:** A checked checkbox.
- Email Information:** This section contains:
  - Name:** A text input field containing 'This is a test template'.
  - Email From:** A text input field containing 'relativity@test.tsd.com'.
  - Send Email From Logged in Users:** Radio buttons for 'Yes' and 'No', with 'No' selected.
  - Email Subject:** A text input field containing 'Test subject'.
  - Email Body:** A large text area containing '@printwholelayout@' with a green arrow pointing to it.

At the bottom, there is a 'Sntp Configuration' section with a dropdown menu set to 'Instance settings' and an 'Add' button.

## Supported placeholders (View Email Templates)

| Placeholder           | Description   |
|-----------------------|---|
| <ObjectType>          | This placeholder will be replaced with the name of the Object Type, as selected in a View Email Template  |
| <ObjectView>          | This placeholder will be replaced with the name of the Object View, as selected in a View Email Template  |
| <ScheduleType>        | This placeholder will be replaced with the name of the Schedule Type, as selected in a View Email Template  |
| <ScheduleInterval>    | This placeholder will be replaced with the value of the Schedule Interval, as selected in a View Email Template   |
| <TriggerCondition>    | This placeholder will be replaced with the name of the Trigger Condition, as selected in a View Email Template  |
| <TriggerThreshold>    | This placeholder will be replaced with the value of the Trigger Threshold, as selected in a View Email Template   |
| <LastRecordsCount>    | This placeholder will be replaced with count of records, which were available during the last conditional check   |
| <CurrentRecordsCount> | This placeholder will be replaced with count of records available during the current conditional check  |
| <UpdatedRecordsCount> | This placeholder will be replaced with the count of added/removed (depending on the selected Trigger Condition) records between the last and current conditional checks |

Example “Email Body” of a “View Email Template” for a specific Saved Search of the Document object:

**User added:** There were <UpdatedRecordsCount> <ObjectType> objects added to the <ObjectView> saved search and the current total records within it, is now <CurrentRecordsCount>.

**Sent via email:** There were **180 Document** objects added to the **Example Search** saved search and the current total records within it, is now **4870**.

## Email History

**Email History** tab of **Email Event Handler** holds all email histories for all **Email Templates** and **Object Types** in a Workspace. Dedicated users will be able to preview senders, recipients, and email details for each individual email sent via **Email Event Handler**:

| #  | Email Template        | Email From        | Email To          | Email Details  |
|----|-----------------------|-------------------|-------------------|--|
| 1  | TestRDO template      |                   |                   | No message was sent because there were no email recipients found. Date Attempted: 4/13/2020 12:00:45 PM  |
| 2  | TestRDO template      | amoncheva@tsd.com | ipavlov@tsd.com   | Email Sent: 4/13/2020 10:42:45 AM  |
| 3  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 10:57:34 AM  |
| 4  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 10:58:51 AM  |
| 5  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 11:58:54 AM  |
| 6  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:04:57 PM The following placeholders have been used in the email message: @fields@ This placeholder has been used to display all of the Object's fields.   |
| 7  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:08:06 PM The following placeholders have been used in the email message: -File- V-model.jpg   |
| 8  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:20:18 PM The following placeholders have been used in the email message: -Child:TestChildRDO:File- -Child:TestChildRDO:File-  |
| 9  | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:21:32 PM The following placeholders have been used in the email message: -Child:TestChildRDO:MultipleChoice- -Child:TestChildRDO:MultipleChoice-  |
| 10 | TestChildRDO template | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:30:45 PM The following placeholders have been used in the email message: -File- V-model.jpg   |
| 11 | TestChildRDO template | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 12:31:18 PM The following placeholders have been used in the email message: -File- V-model.jpg   |
| 12 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:20:27 PM The following placeholders have been used in the email message: -Child:TestChildRDO:MultipleChoice- -Child:TestChildRDO:MultipleChoice-   |
| 13 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:22:53 PM The following placeholders have been used in the email message: -Child:TestChildRDO:TCRMultipleObject:Control Number- -Child:TestChildRDO:TCRMultipleObject:Control Number-   |
| 14 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:25:41 PM The following placeholders have been used in the email message: -Parent- :toni sample rdo -Child- : Test Child AM   |
| 15 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:26:03 PM The following placeholders have been used in the email message: -Parent- :toni sample rdo -Child- : Test Child AM   |
| 16 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:42:19 PM The following placeholders have been used in the email message: -Parent:MultipleChoice- :MChoice1, :MChoice2  |
| 17 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:44:06 PM The following placeholders have been used in the email message: -Parent:MultipleChoice- :MChoice1, :MChoice2 -Parent:SampleRDO- -Parent:SampleRDO-  |
| 18 | TestRDO template      | amoncheva@tsd.com | amoncheva@tsd.com | Email Sent: 4/13/2020 1:45:43 PM The following placeholders have been used in the email message: @link@ This placeholder has been used to provide a link to the Object: http://192.168.1.206/Relativity/Case/Mask/View.aspx?AppID=1025753&ArtifactID=1040015&ArtifactTypeID=1001064&SelectedTab=null |

*Note: Only **Email Templates** with **Save Email History** field set to **Yes** will be tracked and saved in the **Email History** tab.*

## Agents

Email Event Handler application ships with the following agents:

- **Email Scheduler Agent** – responsible for picking up existing requests (created via Scheduled Email Templates object) from *QueuedObjects* table of each Workspace and sending email notifications once the scheduled period is reached.

*Note: The agent should be added manually once the application is installed in a Relativity Instance.*

- **Updated Views Notification Agent** - responsible for picking up existing requests (created via View Email Templates) from *ViewEmailTemplates* table of each Workspace and sending email notifications once the scheduled period is reached, if the pre-set condition is met.

*Note: The agent should be added manually once the application is installed in a Relativity Instance.*

## Special Considerations

- Email Templates do not support the **ArtifactID** field.
- Email Templates do not support the **Produced Documents** field.
- A **colon ':'** is the default object indicator used when the value is empty in the email template. The value of the object indicator can be customized in the email template.
- Field values will not be returned if the field name contains the object indicator.
- Files from "**File**" fields can be sent as attachments to the emails, depending on the "Send File Fields as Attachments" Yes/No field, which is part of the Email Template Layout.
- **Default Send Email Value** should not be set in order to use the selected **Send Email Trigger Condition** as a trigger, when the selected Object's layout is edited & saved.
- If **Default Send Email To Value** is not set, then the selected **Send Email To Field** must be on the specified layout otherwise no email will be sent.
- Once an email is sent, the **Send Email To Field** will be cleared out.
- **Default Values Behavior** field, which is part of the Email Template Layout gives the ability to add extra users as recipients or override the default set of recipients by selecting one of the choices ("*Users Append Defaults*", "*Users Override Defaults*") and manipulating recipients from the Object's layout **Send Email To** field. When "*Always Use Defaults*" choice is set, notifications will be sent to the recipients added to **Default Send Email To Value** field. If **Default Send Email To Value** field is not set, **Default Values Behavior** field won't be present in the Email Template.

- Be mindful of which layout emails are sent, as it may be possible to send information about objects to users without sufficient access.
- The solution can timeout depending on the number of fields that exist on an object. We recommend referencing no more than 5 objects in multi-object fields and referencing views that display no more than 5 objects.
- The view syntax (<view:123456>) can only be used when the specified view exists on the layout specified in the email template configuration.
- The event handler will be triggered only on the **Save** or **Save & Next** actions, and therefore will not apply to mass edit operations or associated object list modifications.
- This rule will apply only to the coding performed after the event handler is implemented. Pre-coded objects would need to be re-coded for the rule to take effect.
- The event handler will be coded with the name of the fields and choices; if the name of any of the fields or choices is changed, the event handler will not work as desired.
- The field and choice names are case sensitive, if the case or field names do not match exactly an error will be thrown.
- Only users that have been granted explicit access to the workspace will be displayed in the User field drop down list when adding new Email User.
- Having an existing object with the names Email Template, Email Users, Email History or SMTP Configuration may cause problems during installation.