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Xerox[®] DocuShare[®] Email Setup and User Guide

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1. Introduction

The DocuShare Email feature provides DocuShare users with the ability to easily email documents to recipients.

Prerequisites

To use the DocuShare Email feature, a site must have access to an account on an SMTP server.

Overview of the DocuShare Email feature

With DocuShare Email installed on a site, an administrator configures the Email feature to use a specific SMTP server.

From DocuShare, a user selects the documents to be emailed. The user indicates recipients, subject, body text, and how the documents are attached to the email message. The SMTP mail server then routes the email to the designated recipients.

2. Configuration

Email

To configure the Email feature:

1. Log in as an **administrator** and go to **Admin Home**.
2. From the Administration Menu, select **Services and Components | Email Feature Configuration**.
3. In the **Enable Email Feature** field, select **Yes**.
4. In the **SMTP Server** field, enter the address of the SMTP server used by the Email feature.
All site documents selected for emailing are sent to this SMTP mail server address.
5. In the **SMTP Server Port** field, enter the port number used by DocuShare to communicate with the SMTP mail server defined in the SMTP Server field.
The default port is 25, but this may not work in some installations. Refer to the SMTP mail server configuration for a valid port number.
6. In the **Username** field, enter the username of the account authorized to access the SMTP server.
7. In the **Password** field, enter the password of the username account.
8. In the **Maximum Email Attachment Size** field, enter the size limit, in kilobytes, allowed for email attachments sent to the SMTP server. The limit applies when a user sends one large attachment that is greater than the maximum size or several attachments with a total size greater than the maximum size. When the size limit is exceeded, no attachments are sent.
The default is a reasonable 25000 KB (25 MB). The maximum size should be slightly lower than the limit set on your mail server. Then users will receive a message when they exceed the limit.
9. Click **Test Connection** to verify the connection to the SMTP server and to verify the username/password combination for that server.
If the test passes, DocuShare displays a success message and sends you an email confirmation. If the test fails, an error message appears. To correct this error, make sure you entered a valid SMTP address, port number and username/password combination, and the SMTP server is running and available.
10. If the test passed, click **Apply** to save the configuration.

Access Tracking

To track sent documents for Email, go to **Site Management | Access Tracking** and select **Custom Event** as an **Operation to Track**.

With Custom Event selected, information about a document sent as email is available on the **Change History** page; accessed from the **Properties** page of the document. Select **Custom Event** in the **Change** field on the Change History page.

To enable SSL or TLS for Email:

1. Open the **PrintEmail.properties** file.
2. Add one (not both) of the following lines of code to the file:
 - To enable the SMTP server for the **email feature SSL**, add the line: **email_smtp_type=SMTP-SSL**.
 - To enable the SMTP server for the **email feature TLS**, add the line: **email_smtp_type=SMTP-TLS**.
3. If the SMTP server requires "From" address verification, add the line **email_smtp_sender=** and set the value according to the following information:
 - If a mail relay server is configured for local email domains, set email_smtp_sender= to **NO**. Email will be delivered with "From" set to the user's email address.
 - If a mail relay server cannot be configured, set email_smtp_sender= to **AGENT**. Email will be delivered with "From" set to the system email address.
4. Start DocuShare.
5. Make sure the server is enabled for SSL or TLS by opening the log file and searching for the following lines:

MobilePrintActionImp.sendMail() Infor:SMTP-SSL indicates that SMTP-SSL is **enabled**.

MobilePrintActionImp.sendMail() Infor: SMTP-TLS indicates that SMTP-TLS is **enabled**.

If neither line appears in the log, that indicates that neither SSL nor TLS is **enabled**.

3. Usage

Once the Email features are enabled on your site, the command is added to the **Edit Selected** menu: **Email**. You access the **Edit Selected** menu from an open collection, the Content Map (if enabled on your site), and the results of a search.

The Email feature enables you to use the Email feature to email documents and collections of documents to others.

Email

You can email documents and collections that contain documents. When emailing the documents, you can attach them to the email or include links to the documents stored in DocuShare.

To email documents:

1. Make sure your email address is specified in your user account properties. Click your username on the navigation bar to view and edit your account properties.
2. Do one of the following:
 - Navigate to and open the collection that contains the documents you want to email.
 - Run a search to find the documents you want to email.
3. Select documents and collections.
4. From the **Edit Selected** menu, select **Email**.
5. On the Confirm Email page, click **Confirm**.
6. On the Send Email page, do the following:
 - a. In the **To**, **Cc**, and **Bcc** fields, enter the email addresses of the people to whom you want to email the documents. Use a semicolon to separate email addresses. Click the **Save List** checkbox next to each field if you want to save the list of email addresses so you can use them again when you email documents.
 - b. Click the **Cc Me** checkbox if you want to receive an email with the documents.
 - c. In the **Body** field, enter the email message text.
 - d. Choose how to attach the documents to the email:
 - **As a single zip file**—Combines all the documents in a single zip file, named DocuShareEmail-<date and time>.zip, and attaches the zip file.
 - **As multiple attachments**—Attaches each document.
 - **As links to documents**—Sends links to the documents and collections stored in DocuShare.
7. Click **Send Email**.

An email confirmation message displays.

4. Troubleshooting

If the Email feature stop working, the following could be the cause of the problem.

Email

1. Click **Test Connection** to check the SMTP server and user account on that server.

If the test fails, possible causes could be one or more of the following:

- The SMTP server is down, or the server configuration or server address has changed.
 - The user account on the SMTP server has been deleted or has changed so the username and password entered in the Email Feature Configuration fields are now invalid.
 - The SMTP port number entered in the Email Feature Configuration field is either blocked or being used by another service.
2. Check to see if the SMTP server is full and is rejecting new email.