



DocuShare Email Agent User Guide



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Getting started

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Welcome

The DocuShare Email Agent improves collaboration and email management capabilities, allowing you to email content directly into DocuShare. Using your email application, you can send messages to DocuShare collections, users, and groups. The Email Agent is fully integrated with DocuShare, enabling you to use DocuShare features to search for email messages, control access to sensitive correspondence, and organize email content.

Using the DocuShare Email Agent you can:

- Share email content by sending messages to DocuShare users and groups.
- Store email messages by sending them to a collection, including your personal collection.
- Add security to email messages by using a digital signature.
- View stored email messages as well as their threads and properties in a browser view.

Prerequisites

To use the Email Agent, you need the following:

- An email application and account
- A web browser
- The URL of your DocuShare server and a DocuShare user account
- The email address of your DocuShare server, which you can obtain from your site administrator
- Knowledge of basic DocuShare features
- *Optionally*, a digital certificate (ID), which you can obtain from either an in-house or a third-party Certification Authority

Resources

This guide explains how to use the capabilities of the DocuShare Email Agent add-on. For complete information on DocuShare features, see the *DocuShare CPX User Guide* located on the Help Desk page.

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Using the Email Agent

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About sending email messages to collections, users, and groups

The Email Agent, together with your email application, enables you to share email content by sending messages and attachments to DocuShare collections, users, and groups. To ensure the security of your electronic communications, the Email Agent supports the use of digital signatures.

When sending an email message to a group, a copy of the message also can be sent to a collection associated with the group. This allows you to conveniently store a group's electronic correspondence. With the Email Agent you can easily manage email distribution lists by creating groups based on your organization's needs.

Object properties unique to the Email Agent

The Email Agent provides additional user, group, and collection properties to support its capabilities. These additional properties are described below.

Table 2–1: Object properties

Property	Description
User properties	
Attachment As URL	Specifies how email attachments are handled when you receive a message sent to a group of which you are a member. Yes includes a link to the attachment in the message; No includes the attachment in the message.
Suppress Email Agent Messages	Stops the Email Agent from sending a mail message for the selected action.
Group properties	
Associated Collection	Specifies the name of the collection to which you want to copy the email messages that are sent to the group. Click the Change button to select the collection that you want to use.
Confirm Email Receipt	Specifies that a confirming email be sent to the person who sent the email message to the group.
Email Alias	A unique, one-word name that can be used instead of the group's handle as the recipient of an email message.
Reply To	Specifies to whom an email reply is sent when any member of the group sends a message. Sender emails a reply only to the user who sent the message; Group emails a reply to all the group members regardless of who sent the message. If the group includes another group as a member, Reply To applies to that group as well.
Spam Control	Controls who can send email messages to the group.
Collection property	
Email Alias	A unique, one-word name that can be used instead of the collection's handle as the recipient of an email message.
Spam Control	Controls who can send email messages to the collection.

Sending email messages to collections

Sending email messages to collections lets you easily share, store, and retrieve messages as needed. To send an email message to a collection, you need the DocuShare server's email address and the collection handle, or, if specified, the collection's **email alias**. Your DocuShare administrator can provide you with the DocuShare server's email address. For convenience, you should add the server's email address to your email application's address book.

You can send a message to a collection if you have Writer access to it. If you do not have sufficient access to the collection, or if you specify an incorrect handle for the collection, the message is sent to a default collection that your DocuShare administrator set up. Ask your administrator for the location of the collection.

You are the owner of any messages you send; your name appears in the collection listing as the object's owner. If the email address specified for your email account is not identical to your DocuShare **Email Address** property (DocuShare is case-sensitive), a default owner name is assigned. Also, when using a digital signature, the message owner is determined from the email address in the signature's digital certificate instead of the email address in the message's **From** field.



Note: To verify that the email address specified for your email account is identical to your DocuShare email address, check the address shown in the email message's **From** field; the *username@emaildomain* part should match your DocuShare **Email Address** property. Alternatively, you can click the **Look Up User** link to the right of the **From** field; if the user account displays on the Search Results page, then the email addresses are identical.

To send an email message to a collection:

1. In your email application, open a message window.
2. In the **To** or **Cc** field (do not use the **Bcc** field), enter the DocuShare server's email address.

Example: docushareserver@emaildomain

3. In the first line of the message body, type **TO:** and the collection handle or the collection email alias. Then add an empty line.

Example: <optional empty line>
TO: Collection-45
 <empty line>
 <optional empty line>
TO: MailCollection
 <empty line>

No other text can precede this address line. When sending a message to multiple collections, you can use a comma, space, or semicolon to separate collection handles or aliases.

Your DocuShare administrator determines whether or not you need to type **TO:** or some other text. You can add spaces or a tab before and after **TO:**.



Note: If you do not specify a collection handle or alias, the email message is sent to your personal collection.

4. Finish composing the message and send it.

The message is sent to the collection, and you will receive an email notification if your administrator configured DocuShare to send confirmation messages.

Allowing non-DocuShare users to send email messages to a collection

You can allow users who do not have DocuShare accounts to send email messages to a collection. Your administrator sets up a user account for the Email Agent to enable this feature. You need to change the collection's access permissions to give either the Email Agent user account or the All Users Except Guest group Writer access to the collection. A default owner name is assigned to a message a non-DocuShare user sends. If you do not change the access permissions, the email messages are sent to a default collection. Check with your administrator for the name of the Email Agent user account as well as for the name of the default collection.

If your administrator does not set up a user account for the Email Agent, then DocuShare cannot receive email messages from non-DocuShare users.

Sending email messages to users and groups

Using your email application, you can send email messages to DocuShare users and groups.

- To send an email message to a group, you need the DocuShare server's email address and the group handle or, if specified, the group's **email alias**.

If an **associated collection** is specified for the group, when you send a message to the group, a copy also is sent to this collection if you have Writer access to it.

- To send an email message to a user, you need the DocuShare server's email address and the user handle or user's username.

When you send a message to a user, a copy also is sent to the user's personal collection.

If you do not have sufficient access to the group's associated collection, or you specify an incorrect handle for the user or group, the email message is sent to a default collection that your DocuShare administrator set up. See your administrator for the location of the collection.

In addition, your DocuShare administrator can provide you with the DocuShare server's email address. For convenience, you should add the server's email address to your email application's address book.

To send an email message to users and groups:

- In your email application, open a message window.
- In the **To** or **Cc** field (do not use the **Bcc** field), enter the DocuShare server's email address.

Example: docushareserver@emaildomain

- In the first line of the message body, type **TO:** and:
 - For a group, the group handle or the group email alias.
 - For a user, the user handle or the user's username.

Then add an empty line.

Examples: <optional empty line>

TO: Group-17

<empty line>

<optional empty line>

TO: DocGroup

<empty line>

<optional empty line>

TO: janeparks

<empty line>

No other text can precede this address line. When sending a message to multiple recipients, use a comma, space, or semicolon as a separator.

Your DocuShare administrator determines whether or not you need to type **TO:** or some other text. You can add spaces or a tab before and after **TO:**.

4. Finish composing the message and send it.

The message is sent to each user and group member, and you will receive an email notification if your administrator configured DocuShare to send confirmation messages.

Viewing messages in a collection

An envelope icon identifies an email message in a collection. In addition, digitally signed as well as encrypted messages are identified by icons next to the message title.

Users with Reader access to a message can view its contents and properties. Any user with Writer access to the mail message can change its properties. As the owner of any message you send, you can delete the message and change its permissions.

To view an email message:

1. On your site, open the collection that contains the message that you want to view.
2. Click the message to open it.
3. To view any message threads, click **View Email Thread** at the top of the message.



Note: A message thread consists of the messages in a collection that share the same message subject. The messages in the thread are ordered according to the received date, with the most recent messages displayed first.

To view and change an email message's properties:

1. Open the collection that contains the message whose properties you want to view and change.
2. Click the message's **Properties** icon.
The View Properties page appears.
3. Click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.



Note: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

Importing a digital certificate to your email application

A digital signature adds security to your email communications by ensuring that the message came from you and has not been changed by someone else. To add a digital signature to an email message, you need to import a digital certificate to your email application (for example, Microsoft Outlook).

This section provides general steps for importing a digital certificate. See your email application's help for step-by-step instructions on importing a digital certificate.

To import a digital certificate to your email application:

1. Contact your DocuShare administrator to find out the Certification Authority (CA) from which you should obtain the digital certificate. The certificate is a file with the extension **.p12** (for example, mycertificate.p12).
2. After obtaining the digital certificate from the CA, copy it to a folder on your computer.
3. Using your email application, import the certificate from the folder on your computer. You will need to provide the following information:
 - Certificate file
 - Password, provided by the CA



Note: If your certificate was issued from a CA that is part of a trusted chain of other certificates and CAs, your email application may ask if you want to add the CA to the Root Store. You can click Yes to add the CA, or you can add it directly to your email application. The latter method requires importing a PEM file with a .cer extension for the CA. The PEM file can be obtained from the CA at your site.

