



Goal: Email a link to a file within EcoDox with or without security.

Complexity Level: Functional User

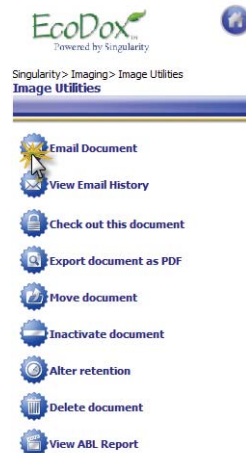
Prereq / Related Instructions: NONE

Step 1: Select Files - Search for the files to be emailed and Select Image Utilities.

page: 1

Destinations	Image Thumbnail	Description	Date
HUMAN RESOURCES		Image Values Workflow History View Image OCR Text Image Utilities	DATE: 11/19/09 EMPL ID: FIRST NAME: Ross LAST NAME: Elliott MAIDEN NAME: SSN: 333-33-3333 TAGS:
APPLICATIONS		Image Values Workflow History View Image OCR Text Image Utilities	DATE: 11/19/09 EMPL ID: FIRST NAME: Zach LAST NAME: Stevens MAIDEN NAME: SSN: 555-55-5555 TAGS:

Step 2: Email Document -
Select the Email Document icon





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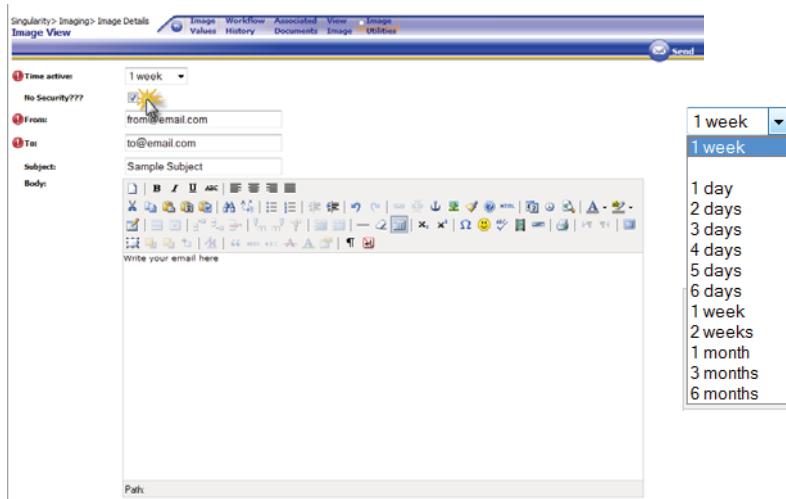
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Step 3: Address and Write Email - Fill in the sender's email and recipient's email address. Checking the no security box will give those who already have a user name and password to use their normal login to view the document.

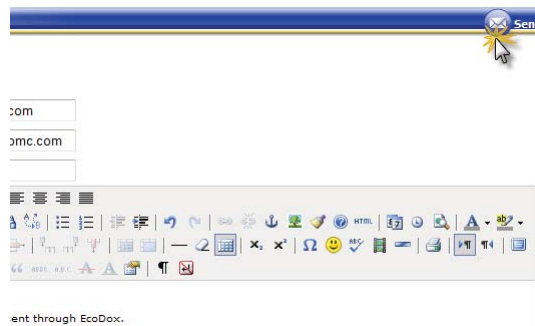
Leaving the security checkbox empty will give the receiver a generated password and username to enter the system and see only the document that was emailed.

Continue to type an email in the window below using the basic toolbars for font styling and other tools.



The first picklist allows the sender to choose how long the recipient is allowed to have access to the document. This can be from 1 day to 6 months.

Step 4: Send- Select the Send button when finished writing email.





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Step 5: Retrieving File- The receiver of the email will get something like the email below with you message. If the sender has sent the access with a secure password, the email will include the automatically generated user name and password to view for the allotted period of time. They will click on the link, put in the password and the file will appear.

Note: the file in this emailing method has not left EcoDox. It is simply giving access and permission for someone else to see a specific document in the system.

sample email from EcoDox

TestEmail@EcoDox.net

Sent: Thu 1/7/2010 11:59 AM


To: reciever@EcoDox.net

This is a sample of an email link from EcoDox.

Sincerely, EcoDox Trainer

<HEAD

You have been granted access to view an archived document.

To view this image please [CLICK HERE](#) 

and login as :

user: yudqun

password: pjbicb

Complete!!!

