



Goal: Email PDF file from EcoDox

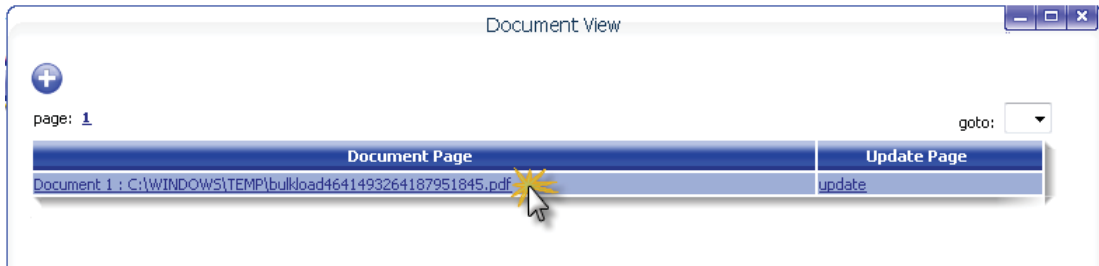
Complexity Level: Functional User

Prereq / Related Instructions: NONE

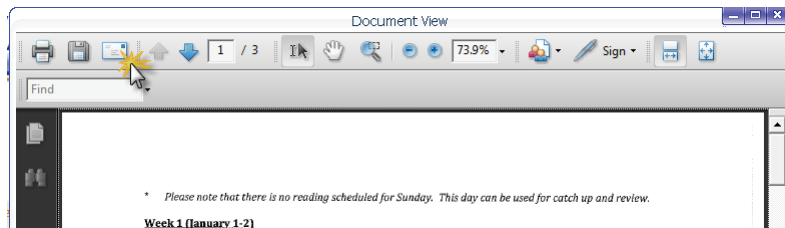
Step 1: Select Files - Search for the files to be emailed and either click on the PDF thumbnail or on View Image (either one will allow viewing of the image).



Step 2: Open PDF- Click on the link, opening the PDF



Step 3: Sending PDF- View the top toolbar of the PDF viewer. It allows for printing, saving to computer, or emailing. Select the picture of an envelope to email.



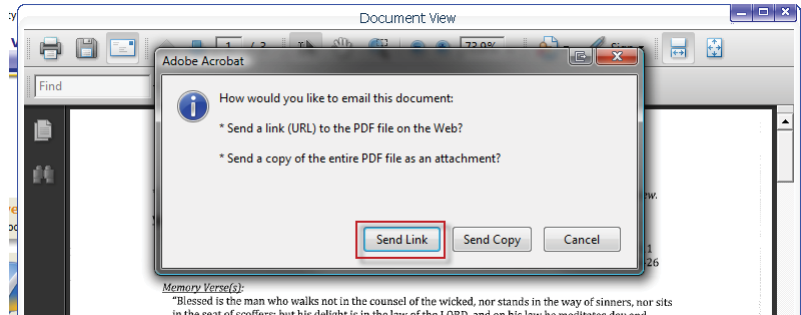


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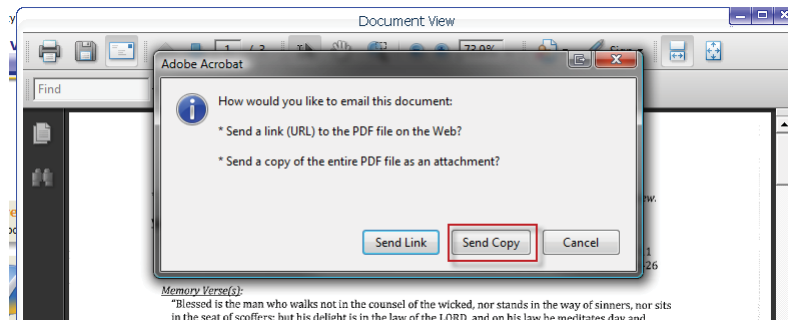
Prereq / Related Instructions: NONE

Step 3b: Sending PDF Link- Select the “Send Link” button to have your outlook email program come up with the link to that document in the system. The only prerequisite to emailing this way is that the receiver needs to be a user of the system. The receiver will need to sign in to view the file.

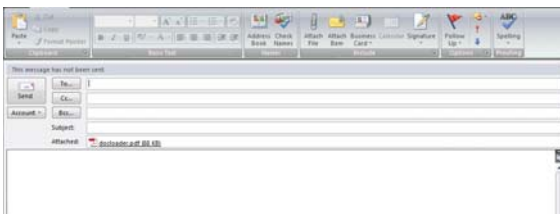


Step 3b: Sending PDF Copy- Select the “Send Copy” button to have your outlook email program come up with the the file attached as a separate PDF. This is helpful to send the entire document to someone who does not have access to the EcoDox system.

Note: keep in mind that this is a separate file that is being sent. The receiver can keep this file indefinitely. It is not constrained like the other method of emailing a link with a limited time of viewing. **If the document is very sensitive or confidential this may not be the best method of emailing. See instructions titled “How to Email Documents.”**



Sample of email with attachment.



Complete!!!

