

**Share and Interact Securely Outside the Organization**

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# Share and Interact Securely Outside the Organization

## Email

Using Xythos, you can send links to files, instead of sending the files themselves, which is both faster and saves unnecessarily wasted disk space. There is no need to make duplicate copies of a single file when you simply send a link to the original file. In this manner, every user is always looking at the most recent version of the file (see figure 4.0.7).

### Method for sending email

The method for sending email may or may not be available, depending on your environment's configuration. If enabled, you have the option to select either Xythos Web-based Email Solution or My Default Email Client from within your My Settings screen.

Selecting the "Xythos Web-based Email Solution" will use the email screens within the web view. Selecting the "My Default Email Client" will launch your email client, such as Microsoft Outlook, when sending email. You must select your true default email client. If, for example your default email client on your computer is Microsoft Outlook and you set your Default Email Client in Xythos to Lotus Notes, Microsoft Outlook will be launched. Selecting the incorrect email client can cause unfavorable results.

The email screens are dependant upon the method you have selected. When using your default email client, you will be prompted to provide information based on your selections.

### Xythos Web-based Email Solution

**Send Email**

*i* You can notify users that you have shared folders and files to them by typing in users' display names, group names or email addresses, separated by commas or semicolons, into the **To:** text box. You may edit the text surrounding the table of files only. File links will be added once the email is sent.

To:

Subject: J Smith has shared some resources to you

**File**      **Subscribe to and/or Bookmarks**

Your list of files will be added to this table once you send this email.

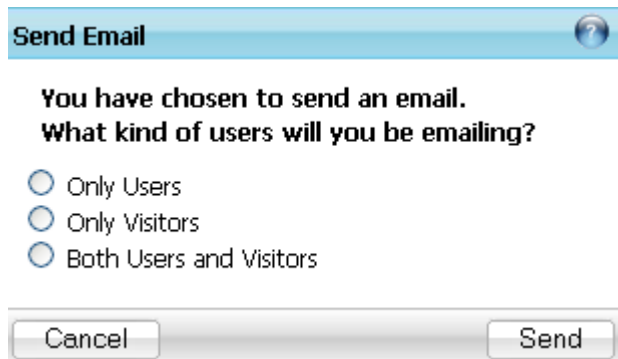
Thank you,  
J Smith

Also send the email to me (J Smith)

Cancel      Send

( Figure 5.0.0 )

## My Default Email Client

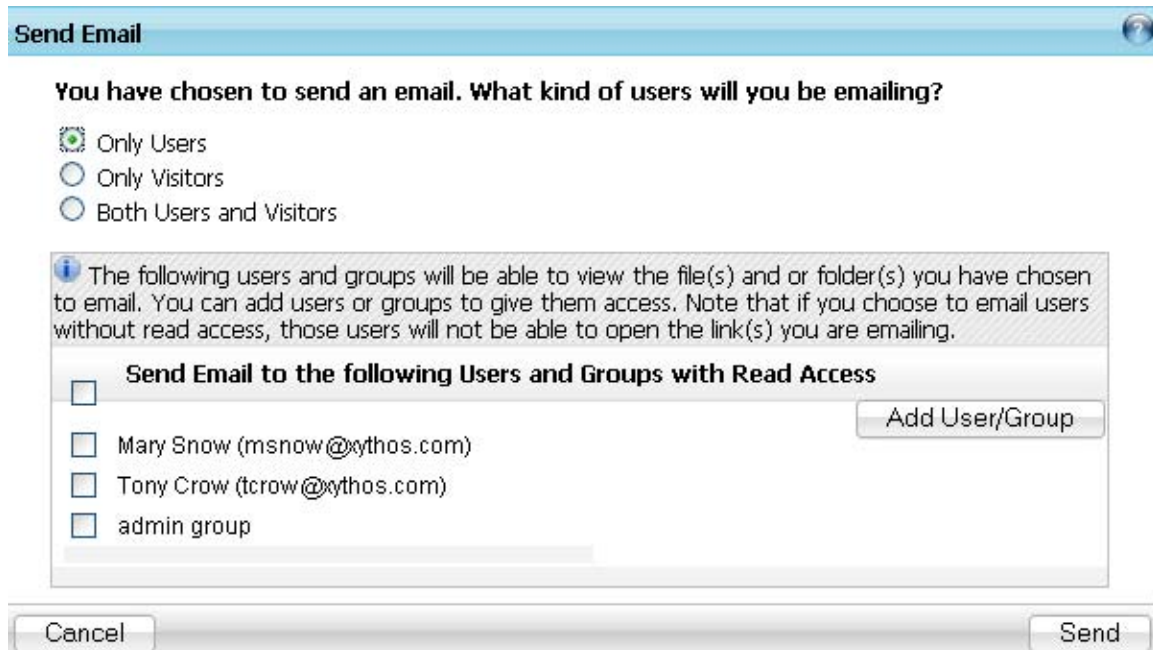


**Send Email**

**You have chosen to send an email.  
What kind of users will you be emailing?**

Only Users  
 Only Visitors  
 Both Users and Visitors

(Figure 5.0.1)



**Send Email**

**You have chosen to send an email. What kind of users will you be emailing?**

Only Users  
 Only Visitors  
 Both Users and Visitors

**i** The following users and groups will be able to view the file(s) and or folder(s) you have chosen to email. You can add users or groups to give them access. Note that if you choose to email users without read access, those users will not be able to open the link(s) you are emailing.

**Send Email to the following Users and Groups with Read Access**

Mary Snow (msnow@xythos.com)  
 Tony Crow (tcrow@xythos.com)  
 admin group

(Figure 5.0.2)

## Send Email



**You have chosen to send an email.  
What kind of users will you be emailing?**

- Only Users
- Only Visitors
- Both Users and Visitors

**\*Ticket Options** ▼

By default, a 30-day ticket without a password will be created for users outside of the system. To change those settings, open Ticket Options.

Cancel

Send

( Figure 5.0.3 )

## Send Email



**You have chosen to send an email. What kind of users will you be emailing?**

- Only Users
- Only Visitors
- Both Users and Visitors

**i** The following users and groups will be able to view the file(s) and or folder(s) you have chosen to email. You can add users or groups to give them access. Note that if you choose to email users without read access, those users will not be able to open the link(s) you are emailing.

**Send Email to the following Users and Groups with Read Access**

Mary Snow (msnow@xythos.com)

Tony Crow (tcrow@xythos.com)

admin group

Add User/Group

**\*Ticket Options** ▼

By default, a 30-day ticket without a password will be created for users outside of the system. To change those settings, open Ticket Options.


Cancel

Send

( Figure 5.0.4 )



## Email users to indicate shared resources

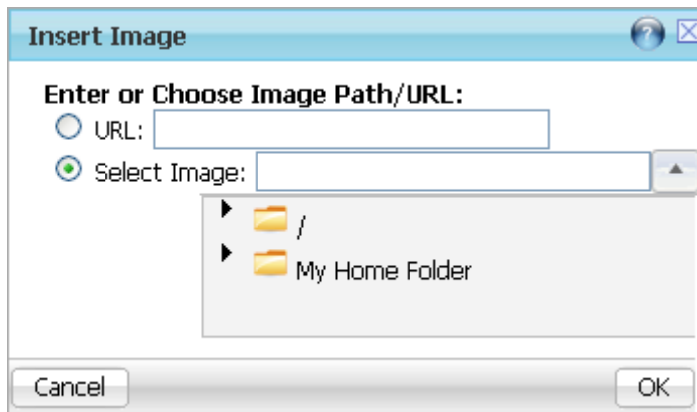
1. Navigate to the intended file or folder.
2. On the **Document Manager** screen place a check mark in the box associated to the file or folder, and then click the **Email**  button.  
**- OR -**  
On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Email** option.
3. If you would like to email additional users, click the **To** entry box, you may start typing a user's **Display name**, their **username**, a **Group name**.
4. Separate users/groups by commas or semicolons. Or, you may click the **To** button to Find and add *users* or *groups*.
5. You may then edit the subject and body of the notification e-mail as you wish. Note that there is a place holder for the link(s) to the file(s) and/or folder(s). Once you send the e-mail, this place holder will be replaced with the appropriate link(s).
6. Click **Send** to send the e-mail.

## Inserting Images and Links

When using the email feature, you have the ability to add not only text, but also images and links.




( Figure 5.0.5 )



( Figure 5.0.6 )





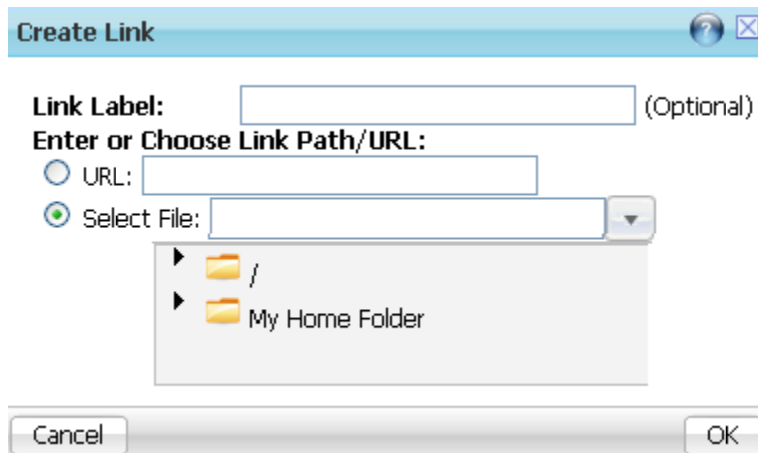
## Inserting an image from a website

1. Navigate to the Email screen.
2. Click the **Insert Image**  button.
3. Click the radio button to the left of the URL field.
4. Type in the full location of the image. For example: <http://www.xythos.com/picture.jpg>
5. Click **Ok**.
6. You will be returned to your email, where the image has now been added directly into the body of the email.



## Inserting an image from your Xythos account


1. Navigate to the Email screen.
2. Click the **Insert Image**  button.
3. Click the radio button to the left of the Select Image field.
4. If you know the exact name and location of the image, you may type it in the Select Image field, otherwise click the  Expand icon.
5. Your folder structure will be listed and you may navigate to the image file.
6. Click the name of the file in order to select the image.
7. Click **Ok**.
8. You will be returned to your email, where the image has now been added directly into the body of the email.



( Figure 5.0.7 )



## Inserting a link from a website


1. Navigate to the Email screen.
2. Click the **Insert link**  button.
3. *Optionally type in the link label. For example: My Website.*
4. Click the radio button to the left of the URL field.
5. Type in the full location of the file or folder. For example: <http://www.xythos.com/file.doc> or <http://www.xythos.com/>
6. Click **Ok**.
7. You will be returned to your email, where the link has now been added directly into the body of the email.


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*\*Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full URL.*



## Inserting a link from your Xythos account

1. Navigate to the Email screen.
2. Click the **Insert link**  button.
3. *Optionally type in the link label.*

4. Click the radio button to the left of the Select File field.
5. If you know the exact name and location of the file or folder, you may type it in the Select File field, otherwise click the  Expand icon.
6. Your folder structure will be listed and you may navigate to the file.
7. Click the name of the file or folder in order to select it.
8. Click **Ok**.
9. You will be returned to your email, where the link has now been added directly into the body of the email.

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*\*Note: Selecting the link label option allows for a friendly name to be displayed in the email rather than the full location on Xythos.*

## What happens when this e-mail is received?

If you have selected the option **Both users and visitors**, a link will be sent which will prompt the user to login, or allow the visitor to continue. Although you may access the shared files without logging in, it is encouraged to login if you are a user in the system so that you may have all appropriate permissions.



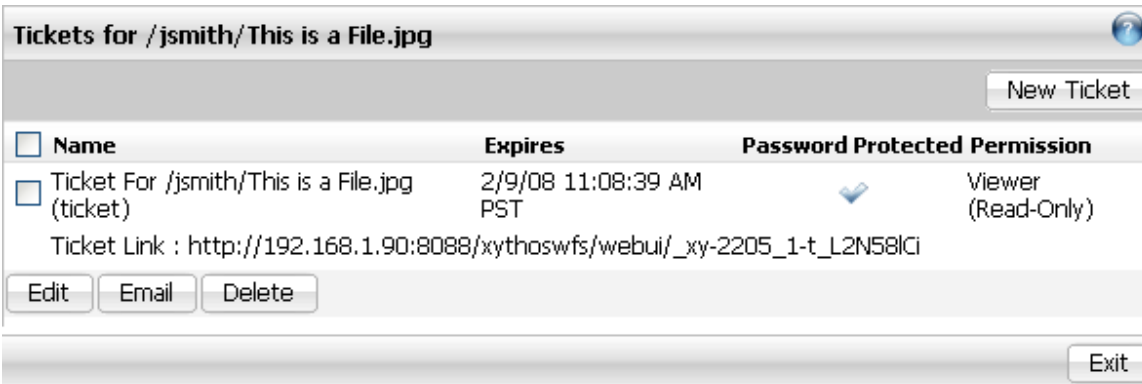
© Copyright 2003 - 2008 Xythos Software, Inc. All rights reserved.

(Figure 5.0.8)

## Tickets

Tickets allow both non-Xythos and Xythos users access to your files and folders. By using the ticket functionality, you may allow specific access to your folders, their sub-folders, and the files within. A folder ticket can be thought of as a direct online link to a folder. The person with whom you'd like to grant access to the file or folder will receive an e-mail with the online link. When the link is clicked, the user is taken to the Xythos interface and the folder's file and sub-folder listing displays just as you would see it in its regular folder listing screen. Tickets can be created for one file or folder, or any combination of multiple files and multiple folders.

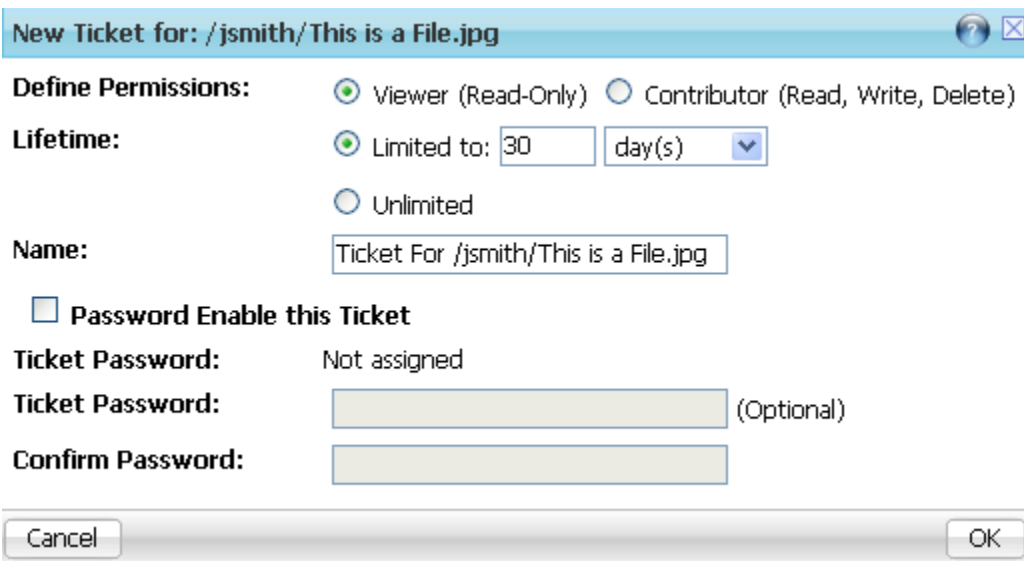
When granting access to files and folders through tickets, you must define the type of access or permissions the user(s) should receive. In addition to setting access/permissions for your ticket, you may also password protect the contents. When the user receives the ticket link via e-mail, they will be prompted for a password when attempting to access the link. If a user is granted *Read and Write* permission for a ticket, however they are not provided the password then they will not be able to access the contents of the ticket.



( Figure 5.0.9 )

### Create a ticket

1. On the **Document Manager** screen, **Right-Click** the selected file or folder, and then click the **Manage -> Tickets** option.  
- OR -  
On the **Manage** screen, select the **Tickets** link.
2. Click the **Create Ticket** button.



( Figure 5.1.0 )

3. A new window will appear with default ticket values. You may modify the following:
  - a. Permissions
  - b. Lifetime
  - c. Name
  - d. Password
 When you are satisfied with the values, click **OK** to create the ticket.
4. The ticket is now listed in your **Tickets** screen. You may copy and paste the URL of the ticket into your preferred email client, or simply place a checkmark in the box(es) corresponding to the ticket(s) and click the **Email** button.
5. You may edit any of your tickets by returning to the ticket screen.

## Default Ticket Values

If choosing to accept the default values of a ticket, your ticket has the following default properties:

Property	Default Value	Available Values
Permissions	Viewer (Read Only)	Viewer (Read Only) or Contributor (Read, Write and Delete)
Lifetime	30 days	1 minute to an unlimited time
Name	System-determined. The default name is "Ticket For <folder_name><file_name><appended_number>" where <folder_name> is the folder's name, <file_name> is the file's name, and <appended_number> is an appended number should there already be a ticket by this name	Any name that has not already been used for another ticket
Password	none	Passwords may be any length

## What happens when I e-mail this ticket?

If you have created a ticket in the above manner and have clicked the **Email** button, an e-mail message is automatically created with the link. From here, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, he/she will be able to click on this link and see the folder listing or open the file, depending on whether the ticket was created for one or more files or one or more folders.

The user will be able to perform functions according to the permissions granted on the ticket.

## What happens when I send a password-protected ticket?

If you have created a ticket in the above manner, you may send ANY user (Xythos or non-Xythos) this e-mail. Once the user receives the e-mail, that user must enter the correct password before being granted access to the folder's listing or the file.

If the user enters the correct password, the folder listing or file will be displayed. If the user enters the correct password and is logged in as a Xythos user, that user will remain logged in and their folder listing will automatically refresh with the ticketed folder listing, or the file will automatically launch.

If the wrong password is entered, a message will display on the Xythos screen informing the user of the incorrect password. This screen will remain in the browser window until the user enters the correct password. There is no limit to the number of incorrect password attempts.

## E-mail an existing ticket

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Email** button.
3. You will have the option of either e-mailing the ticket link, or the password enabled ticket link (if you enabled a password) by clicking on the associated button.
4. The web-based email solution, or your default e-mail client will open.
5. The full path and file name of the ticket will be listed, along with an intelliink which does not require a Xythos account to access.
6. Click the **Send** button in order to send the ticket.

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*\*Note: Once you have finished composing the automatically-generated e-mail message, you may e-mail the link to any non-Xythos or Xythos user. If you have sent the password-protected link, you must separately provide your e-mail recipients the correct password.*

### **Edit/Retrieve a ticket's password**

Note that if you are viewing the tickets of a shared resource, some tickets may be owned by users other than you. If such a ticket is listed, you will not be able to edit or delete that ticket and therefore, those two options will not be available for the respective ticket.

1. **Right-Click** on the file or folder, and then select **Manage -> Tickets**.
2. Within the **Tickets** screen, place a check mark in the associated box, and then click the **Edit** button.
3. Type in a new **Password**, confirm the password, and then click the **OK** button.
4. Click the **Exit** button in order to exit the **Ticket** screen.

### **View all of your existing Tickets system wide**

1. Click on the **Home** link in the top left of the main menu.
2. Within the **Document Manager** screen, click on the **Reports & Tools** tab.
3. Click on the **My Tickets** tab.