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Xerox® DocuShare® Print and Email Setup and User Guide

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This document supports DocuShare 7.0

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Introduction

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DocuShare Print and Email includes these capabilities:

- The DocuShare Print feature provides DocuShare users with the ability to send documents for printing on any Xerox Mobile Print Solution-enabled printer in their organization.

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

Prerequisites

- To use the DocuShare Print feature, a site must have access to a print server that is running Xerox Mobile Print Solution software and to an account on an SMTP server.

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

Overview of the DocuShare Print feature

With DocuShare Print and Email installed on a site, an administrator configures the Print feature to use a specific Xerox Mobile Print Server and a specific SMTP server. Document formats supported for printing are displayed on the Admin UI Print Feature Configuration page.

From DocuShare, a user selects the desired documents to be printed. DocuShare sends the user an email message that contains a confirmation number. A user can then enter the confirmation number into any Xerox Mobile Print Solution-enabled printer that is connected to the target Xerox Mobile Print Server and print any or all of the documents.

Overview of the DocuShare Email feature

With DocuShare Print and 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.

Configuration

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Print

Note: **The same SMTP server, port number, and username/password can be used for both Print and Email feature configurations.**

To configure the Print feature:

1. Log in as an **administrator** and go to **Admin Home**.

2. From the Administration Menu, select **Services and Components l Print Feature Configuration**.

    The file extensions supported for printing are listed on this page.

3. In the **Enable Print Feature** field, select **Yes**.

4. In the **Mobile Print Server Email Address** field, enter the email address of the target print server.

    Note: **The target print server must be running Xerox Mobile Print Solution software.**

5. In the **SMTP Server** field, enter the address of the SMTP server used to send documents to the Mobile Print Server.

6. 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.

7. In the **Username** field, enter the username of the account authorized to access the SMTP server.

8. In the **Password** field, enter the password of the username account.

9. In the **Maximum Email Attachment Size** field, enter the size limit, in kilobytes, allowed for document attachments sent to the SMTP server. The limit applies when a user sends one large document that is greater than the maximum size or several documents with a total size greater than the maximum size. When the size limit is exceeded, no documents 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.

10. 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.

11.   If the test passed, click **Apply** to save the configuration.

Email

Note: **The same SMTP server, port number, and username/password can be used for both Print and Email feature configurations.**

To configure the Email feature:

1.   Log in as an **administrator** and go to **Admin Home**.

2.   From the Administration Menu, select S**ervices and Components l 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 both Print and Email, go to **Site Management l Access Tracking** and select **Custom Event** as an **Operation to Track**.

With Custom Event selected, information about a document sent as email or for printing 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.

SSL or TLS certificate

To install an SSL or a TLS certificate:

1. Stop DocuShare.

2. Obtain a certificate file from an SMTP mail vendor, by going to http://slproweb.com/products/Win32OpenSSL.html and downloading the Windows version of openssl.

3. Install openssl in the **C:\OpenSSL-Win32** folder.

4. Open a DOS command window and run:

    a. C:>cd C:\OpenSSL-Win32\bin

    b. C:\OpenSSL-Win32\bin>setOPENSSL_CONF=C:\OpenSSL-Win32\bin\openssl.cfg

5. Run one of the following commands to obtain either an SSL or a TLS certificate:

    –   **For an SSL certificate**, run **C:\OpenSSL-Win32\bin>openssl s_client -connect <your smtp server address:your smtp server port> -showcerts**.

    For example, using Gmail with 465 as the SSL port: C:\OpenSSL-Win32\bin>openssl s_client -connect smtp.gmail.com:465 smtp -showcerts.

    –   **For a TLS certificate**, run **C:\OpenSSL-Win32\bin>openssl s_client -connect <your smtp server address:your smtp server port> -starttls smtp -showcerts**.

    For example, using Gmail with 587 as the TLS port: C:\OpenSSL-Win32\bin>openssl s_client -connect smtp.gmail.com:587 -starttls smtp -showcerts.

6. Open the certificate file and copy the text starting with **-----BEGIN CERTIFICATE-----** and ending with **-----END CERTIFICATE-----**, and save it as a text file.

    Note: If there is a multiple certificate chain, copy and save each certificate into individual files; such as yyy1.cer, yyy2.cer, etc.

7. Continue with the next section of these instructions to enable SSL or TLS.

To enable SSL or TLS for Print and 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 **print feature SSL**, add the line: **print_smtp_type=SMTP-SSL**.

      –   To enable the SMTP server for the **print feature TLS**, add the line:
           print_smtp_type=SMTP-TLS.

3.   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.

4.   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. Please note that the print feature will not work in this configuration.

5.   Copy the SSL or the TLS certificate file into the **$DSHOME/jdk/bin** folder.

6.   From a DOS window, run **keytool -import -trustcacerts -file you_mail_server.cer -alias mykey -keystore ../jre/lib/security/dstruststore**.

7.   Enter **password** at the password prompt.

8.   At the prompt, reply **yes**.

9.   Start DocuShare.

10.   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**.

Usage

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Once the Print and Email features are enabled on your site, two commands are added to the **Edit Selected** menu: **Print** and **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 Print feature enables you to send DocuShare documents to a Xerox Mobile Print Server so you can print them on any Xerox Mobile Print Solution-enabled printer in your organization. You use the Email feature to email documents and collections of documents to others.

Print

Printing DocuShare documents on a Xerox Mobile Print Solution-enabled printer involves these steps:

1. In DocuShare, select the documents or collection of documents that you want to print and choose the **Print** command.

2. Receive an email message with your confirmation number.

3. Go to any Xerox Mobile Print Solution-enabled printer and print the documents using your confirmation number.

The following formats are supported for printing:

- Microsoft Office documents: .doc, .docm, .docx, .ppt, .pptm, .pptx, .xls, .xlsm, .xlsx

- Rich text documents: .rtf

- Text documents: .txt

- PDF documents: .pdf

- Image files: .gif, .jpeg, .jpg, .png, .tif, .tiff

- Formatted and unformatted email messages: .eml

To print 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 print.

   – Run a search to find the documents you want to print.

3. Select documents and collections.

4. From the **Edit Selected** menu, select **Print**.

5. On the Confirm Print page, click **Confirm**.

6. Check your email for a message with the confirmation number.

7. Go to a Xerox Mobile Print Solution-enabled printer, enter your confirmation number, select the documents you want to print and the printing options, and then print your documents.

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 of 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.

Troubleshooting

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

Print

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 Print Feature Configuration fields are now invalid.

    –   The SMTP port number entered in the Print Feature Configuration field is either blocked or being used by another service.

2. Check for the receipt of a confirmation email. If you did not receive an email confirmation, the confirmation number might have been mailed to the wrong address. Check your user properties to make sure the address listed there is correct.

3. Check to see if the SMTP server is full, and is rejecting new email.

4. Verify that the target Mobile Print Solution server is running, and that the configuration or server address server has not changed.

5. Verify that the printer selected to print the documents does have access to the target Mobile Printer Solution server.

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.