



Sharing Resources

Help Documentation

Sharing Resources: Contacts, Tasks, Calendars, Notes and Email Folders

SmarterMail gives users the ability to share several things with other people within their organization. This includes primary resources as well as secondary resources. For example, SmarterMail creates default calendars, contact lists (address books), task areas and more. These can be shared, but any new "folder" you create -- a new calendar, a new tasks area, etc. -- can also be shared, all on its own. For email folders, parent folders can be shared along with any sub-folders created within the parent, or individual child folders can even be shared individually. This all makes collaborating with co-workers within your organization extremely simple, as well as extremely flexible.

When synchronizing your account to a mobile device, or some desktop clients, using protocols such as EAS and EWS, shared items can be available on those devices and in those clients. Each device and client acts a little differently, however, so not every shared resource may be available to you due to limitations of the device/client or even a limitation of the protocol being used. For example, when using the Gmail client on an Android device, there's no way to get shared Tasks. In addition, some clients act differently based on the type of permission given to a shared item. Generally, shared items will synchronize if the item is shared with Full permissions, as opposed to Read Only or Availability. Clients such as eM Client and Outlook generally reject any share with any other permission type.

The following areas can be shared with other organizational members:

- Email Folders - parent folders as well as child (sub) folders
- Calendars - primary and secondary
- Contact Lists / Address Book - primary and secondary
- Tasks - primary and secondary
- Notes - primary and secondary

That leaves areas like Team Workspaces, News feeds and File Storage as the only areas without traditional sharing options. However, both Team Workspaces and File Storage are collaborative by their very nature. So, they can be "shared", just not the same way as contacts, tasks, etc.

How to Share

There are a couple of different ways to share items: from within an area itself or from the Shared Folders area of your user settings. One of the important things to know about sharing is that when you either initiate a share with someone, or revoke that share, those actions are automatic. That means that the other person -- or those other people -- don't have to do anything. They will either see the shared item or it will be removed. The same holds true when something is shared with you, or if that share is revoked: it will simply appear or disappear.

Sharing an Individual Item

Whether you're sharing a calendar or a task list, the process is essentially the same. The only real difference is that SmarterMail allows you to share individual email folders versus calendars, task folders, etc. which are, essentially, all-or-nothing shares as there aren't sub-anything in those areas. Therefore, an email folder requires a user to right-click to pull up a context menu that offers options whereas a calendar, say, will automatically open that calendar's options when you click on it directly. This latter action is the same for Tasks, Notes and Contacts.

Regardless of how you get to a folder's sharing option, you're presented with the following:

- **Users** - This area allows you to share the item with one or more user, and each user you add to the share can have their own permission level. These are:
 - **None** - This permission acts as a "negater" and is, therefore, only available for users. For example, let's say you have a user group set up for your Marketing Department. However, you don't want to share Notes with Henry because he ate your piece of cherry pie last week. You add Full Control access to the Marketing Department user group, you'd add Henry's username under Users and set his access to "None". That way, you're sharing Notes with everyone in Marketing EXCEPT Henry as you've negated his permission.
 - **Availability** - Used exclusively for calendars, this permission means that the user with this permission can see whether a person is available for scheduling purposes, but it doesn't allow for the viewing of a calendar or its appointments/events.
 - **Read-only** - This means that the user can only view the items in the share (calendar entries, contact lists, etc.), they have no control over editing entries, adding entries, etc. A read-only share would be good, say, for a colleague who needs access to a contact list, but who doesn't need to manage those contacts in any way.
 - **Full Control** - This access allows others to add, edit and/or delete any items within the share. Basically, they use whatever is being shared just as if it were their own.
- **User Groups** - This area allows you to share the item with groups of users that have been set up previously. When sharing with a User Group, the same permission levels are available EXCEPT for None as that is a user-only permission.

Using the Sharing Area

Another way to share items is using the Sharing area. You access this area by going to Settings > Sharing. You'll notice this area separated into 2 different tabs: Shared with Me and Shared with Others.

Shared with Me

This tab displays all the items that have been shared with your user. This includes email folders and sub-folders, contact lists, tasks and notes. This tab displays the following:

- Shared By - The user sharing the item with you.
- Folder - The name of the "folder" that's been shared. This is, essentially, the name of the shared item. (E.g., Conference Room A)
- Type - The type of shared item: calendar, email folder, notes, etc.
- Attached - This indicates whether the item is actually attached to your user. If it's not attached, it can't be accessed.
- Subfolders - This indicates whether the subfolders within the parent are also shared with you.
- Permissions - The permission level you have for the shared item. (E.g., Read-Only)

Clicking on an item in the Shared with Me list opens the details of the item. You can see the name, who shared it and the permission for the item. In some cases, there are also customization options and additional information that may be available. For example, on calendars you can adjust the color of the calendar items to customize how they appear. In addition, for WebDAV items (calendars and contacts), you have the CalDAV or CardDAV link displayed. Finally, you can attach or detach the share from within the modal window. You can also attach or detach items simply by checking the box next to the item, then clicking the appropriate button at the top of the content window.

You'll also notice "Attach" and "Detach" buttons. While shares are automatic, you may have need to remove, or Detach, a shared item, for one reason or another. For example, if your CEO's calendar was shared with you, but you need to show your calendar to someone -- a client, possibly -- you may want to temporarily detach the CEO's calendar from yours so no sensitive information is displayed. In this case, you'd select the CEO's calendar and click the Detach button. Then, once the prospective client leaves, you'll want to select that calendar and click the Attach button. The key here is that you've removed the share, but the CEO hasn't. Therefore, the calendar is still shared with you, it's just been temporarily detached.

Shared with Others

This tab displays the items you have shared with others within your organization. It offers similar information as the Shared with Me tab, including:

- Folder - The name of the "folder" that's been shared. This is, essentially, the name of the shared item. (E.g., Conference Room A)
- Type - The type of shared item: calendar, email folder, notes, etc.
- Subfolders - This indicates whether the subfolders within the parent are also being shared.

- Permissions - The permission levels associated to the share. This is an indication of how many users and/or user groups the item has been shared with.

Clicking on an item opens its options. This allows you to modify the share by adding in additional users, changing permissions for existing users and/or user groups, etc.

It's also possible to create a new shared item from the Shared with Others tab. Simply click the New button at the top of the content pane. This opens a new modal and offers the following options:

- Folder - The type of share you want to create, based on the "folder", or item, you want to share. All of the items you have available to be shared are listed in this dropdown: all calendars, all email folders, all address books, all notes and all tasks.
- Users - This area allows you to share the item with one or more user, and each user you add to the share can have their own permission level. These are:
 - None - This permission acts as a "negater" and is, therefore, only available for users. For example, let's say you have a user group set up for your Marketing Department. However, you don't want to share Notes with Henry because he ate your piece of cherry pie last week. You add Full Control access to the Marketing Department user group, you'd add Henry's username under Users and set his access to "None". That way, you're sharing Notes with everyone in Marketing EXCEPT Henry as you've negated his permission.
 - Availability - Used exclusively for calendars, this permission means that the user with this permission can see whether a person is available for scheduling purposes, but it doesn't allow for the viewing of a calendar or its appointments/events.
 - Read-only - This means that the user can only view the items in the share (calendar entries, contact lists, etc.), they have no control over editing entries, adding entries, etc. A read-only share would be good, say, for a colleague who needs access to a contact list, but who doesn't need to manage those contacts in any way.
 - Full Control - This access allows others to add, edit and/or delete any items within the share. Basically, they use whatever is being shared just as if it were their own.
 - User Groups - This area allows you to share the item with groups of users that have been set up previously. When sharing with a User Group, the same permission levels are available EXCEPT for None as that is a user-only permission.

As you can see, the process for sharing contacts, calendars, tasks and even email folders is essentially the same and relatively simple: you select the item you want to share, add the users and/or user groups you want to share to, and set the Access permissions for each. Once you've saved your settings, the people you've shared with will have those items automatically mapped to their users.