Secure Document Sending

Introduction

This facility allows the sending of documents as download links rather than as attachments to emails. This is particularly useful when the documents are too large to email or more control over their initial distribution is required.

The documents are delivered by https download from a web server linked to IQXHub. An existing iqxWEB installation can be used for the purpose, or a dedicated one set up for the purpose.

The feature is currently only implemented for the sending of Data Access Request (GDPR) Reports which exceed 10MB in size, and as a webservice callable from Job Runner.

Future enhancements will include: use in further areas of IQX when sending documents, configurable limits on number of downloads and control of link expiry dates.

Implementation

Pre-Requsites

- IQXHub v5.2.2.1 or later
- IQX v2.18.4 or later
- iqxWEB that includes apiSecureDownload.js
- An SMTP account for sending the notification emails

Configuration

In Maintenance | Agency Setup | SMTP settings add a new SMTP profile with the name SECUREDOCUMENTLINK The Web Site Address setting must be completed with the base URL and port of the web server to be used, eg https://MyAgency.com:3000

Usage - IQX

If the SMTP profile is configured, the system will automatically step in to send a link rather than an attached Data Access Request Report. The recipient will receive two emails, one with the link and download instructions, the other with the password that needs to be provided to download the file and then again to open the pdf.

Usage - Job Runner

Sample Job:

```
<Job title="Secure Document Link Example">
  <StaticFunction service="SecureDocument" request="submit"
email="zzz@iqx.co.uk" path="d:\temp\broadbean.doc" title="Broadbean Spec"
pwd="*"/>
  <Else>
    <MessageDialog text="{WebServiceResult}" />
  </Else>
</Job>
```

Notes:

pwd="*" specifies that a random password will be generated for access to the download and the zip file. It will be automatically sent in a separate email. Alternatively you can specify an explicit password or leave blank for a non-secured download link.

You can also specify downloads=x for the number of times the link can be accessed (default 1), and days=y for the number of days the link remains available (default 30).

Support jobs:

```
<Job title="Secure Document Clean Up of Expired Links">
  <StaticFunction service="SecureDocument" request="cleanup"/>
  <Else>
    <MessageDialog text="{WebServiceResult}" />
  </Else>
</Job>
```

```
<Job title="Secure Document Test SMTP Configuration">
  <StaticFunction service="SecureDocument" request="test"
email="zzz@iqx.co.uk"/>
  <Else>
    <MessageDialog text="{WebServiceResult}" />
  </Else>
</Job>
```

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