DataMotion SecureMail On-Premises Configuration Guide

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REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

Version 1

Initial version of this document.

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About This Publication

ABOUT DATAMOTION SECUREMAIL ON-PREMISES CONFIGURATION GUIDE

This publication describes how to use DataMotion® SecureMail on Premise Configuration Guide.

DataMotion SecureMail On-Premise Configuration applies to those customers who are not a part of our SaaS and have their own installation.

DataMotion SecureMail provides easy-to-use encrypted email messaging and data transfer via the Internet for protecting all of the important information flowing between you, your business partners and your clients.

The SecureMail system utilizes notification emails. When a SecureMail user sends a message to another user (whether registered with SecureMail or not) the email address associated with that user will be sent an email notifying them that someone has sent them a SecureMail message. Another type of notification email is when you have a new message in your inbox waiting for you to open it. Also, a notification email will be sent to the composer when the recipient has viewed their secure message.

These instructions describe how to tailor the message notification emails specifically for your business. The administrator of the DataMotion SecureMail account can do this simply.

Custom company notification templates are easy to integrate. All that is required is a plain text or HTML formatted file properly formatted to fit the guidelines proposed in this document.

The SecureMail by default is set to create recipient accounts for those users who are sent a SecureMail message but are not in the system. A desired feature is to be able to turn on and off the auto recipient creator. This guide will instruct you on how to do so.

INTENDED AUDIENCE

This publication is intended for a technical audience, including engineers, developers, programmers, system administrators, and system and application integrators.

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Additional technical documentation, as well as user documentation, is also available from DataMotion. See *DataMotion Documentation* (below).

PRODUCT TERMINOLOGY

Because the various technology components shown in the have been time-tested, they have acquired synonyms in the documentation that are useful to know.

The following table provides synonyms that you may encounter for some of the **User Interface** components. The synonyms may refer to the component or an identifiable part of the component.

Synonyms for User Interface Components

Component:	Sometimes Referred to as:
Webmail Portal	Web Portal, SecureMail Portal
Email Client Integration	SendSecure Button
Electronic Forms	eForms, SecureForms
Inbound Contact	SecureContact and SecureContactMe

The following table provides synonyms that you may encounter for some of the **System Interface** components.

HOW TO USE THIS PUBLICATION

The content is organized as follows:

About This Publication.
Provides an overview of the content of this publication and how to use the publication.

Custom Notification Templates.
Provides a detailed walkthrough of setting up custom email notification messages.

Enable/Disable Recipient Accounts.
Provides a detailed walkthrough of enabling/disabling recipient accounts.

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- SecureMail *User Guide* (part # 050003)
  Provides instructions for using the products.
- SecureMail *Administration Guide* (part # 050005)
  Documents the system installation, maintenance, and administration tools for administrators and integrators.

Additional documentation is available on many other topics. Please contact DataMotion Customer Service for more information.

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1
Custom Notification Templates

HTML DOCUMENT SET-UP

This information describes how to properly set-up and format your HTML template for proper use.

REVIEW THE REQUIREMENTS

You must meet the following requirements to apply your custom template:

1. Have a DataMotion SecureMail administrative account.
2. Have an on-premise administrative account.
3. You must have a DataMotion SecureMail account that has been provisioned and is ready to send secure emails.

BASIC FORMATTING

There are several guidelines that need to be followed for the custom template to work correctly as desired.

1. Everything you want to appear in the custom notifications must be in the body of your html file.
2. Embedded images and linked images are supported. For an embedded image, the file must be placed somewhere in the template tree and must be referenced with:

   ```
   <img src="logo.png" alt="logo" />.
   ```

   If you would rather link a direct image from your web server, you can reference it with:

   ```
   <img src="https://yourcompanysite.com/images/logo.png" alt="logo" />.
   ```


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Considerations:

If the image is linked off site, there is a chance the image will not display for the recipient, referencing the local image will add the image as an attachment; increasing the likelihood of successful delivery.

ADVANCED FORMATTING

Advanced formatting and customization are available as well. When designing the html templates, CSS is also supported. Anything that can normally be sent through html formatted emails is allowed through DataMotion SecureMail as well. **Please note:** *Other Considerations* (on page 10). Some customizations may require additional file modifications and for that, please field questions to Technical Support at 1.800.672.7233.

Example: One of the most common changes is when companies add their own terms and conditions. If you examine the **NoticeRegRec.txt**, right above the horizontal dashes one could paste in their own conditions or information. Similarly, if you examine the **NoticeRegRec.htm**, one could go right above the horizontal line rule and add their own html formatted terms and conditions or other information.

UPLOADING YOUR TEMPLATE FILE

Before performing the procedures in this guide, you must be an administrator for DataMotion SecureMail.

1. Obtain the company ID that you wish to modify by visiting the cobranding console under the admin tools on your SecureMail admin web portal.
2. Obtain the Support Files Path. This can be found on the general server settings page under admin tools on your SecureMail admin web portal.
3. Establish a SSH connection to the server and navigate to where the template files are stored (**Default:** C:\Program Files (x86)\CertifiedMail.com Inc\CertifiedMail Server Prerequisites\SupportFiles)
4. You will want to replace the existing file with the new file. **NOTE:** They must be named exactly the same.

   Example: To override the default "You have mail" (**noticeRegRect.txt)** notification for company **TestCompany** with ID 0516, you would create the following file:

   C:\Program Files (x86)\CertifiedMail.com Inc\CertifiedMail Server Prerequisites\SupportFiles\0516**noticeRegRec.txt**
5. Once the new file has been uploaded, it is important to remember that for any changes to take effect, you must restart the messaging service.

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OTHER CONSIDERATIONS

1. Be careful of who the target audience is. If the recipient's email client filters out html formatted emails or is on a device with data restrictions, html formatted templates would most likely not work.

2. For more complicated operations and individual needs, please contact Technical Support at: 1.800.672.7233.

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2
Enable/Disable Recipient Accounts

REVIEW THE REQUIREMENTS

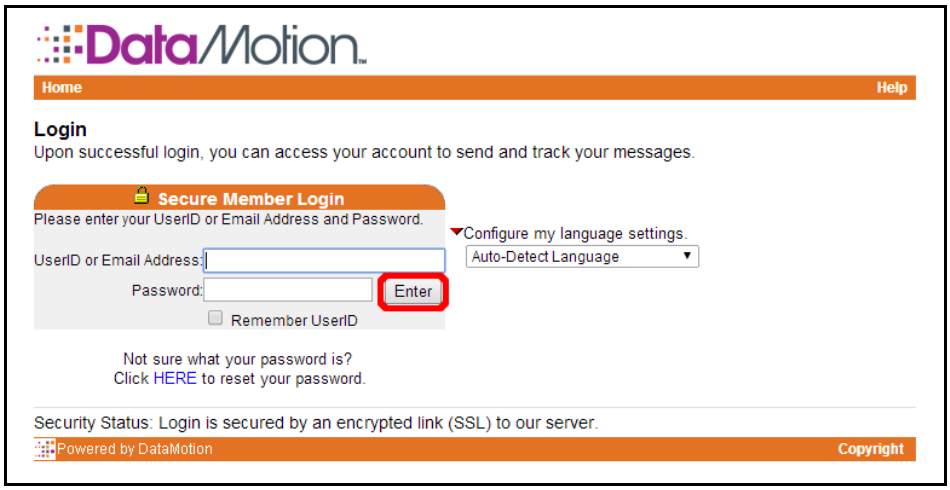
You must meet the following requirements to enable/disable recipient accounts:

1. Have a DataMotion SecureMail administrative or integrator account.
2. You must have a DataMotion SecureMail account that has been provisioned and is ready to send secure emails.

LOGGING IN TO YOUR ACCOUNT

To access this setting, you need to log in to your account. To log in to your account follow these steps:

1. Open your web browser.
2. Navigate to https://ssl.datamotion.com.
3. Enter your SecureMail email address and password.
4. Press the **Enter** button.



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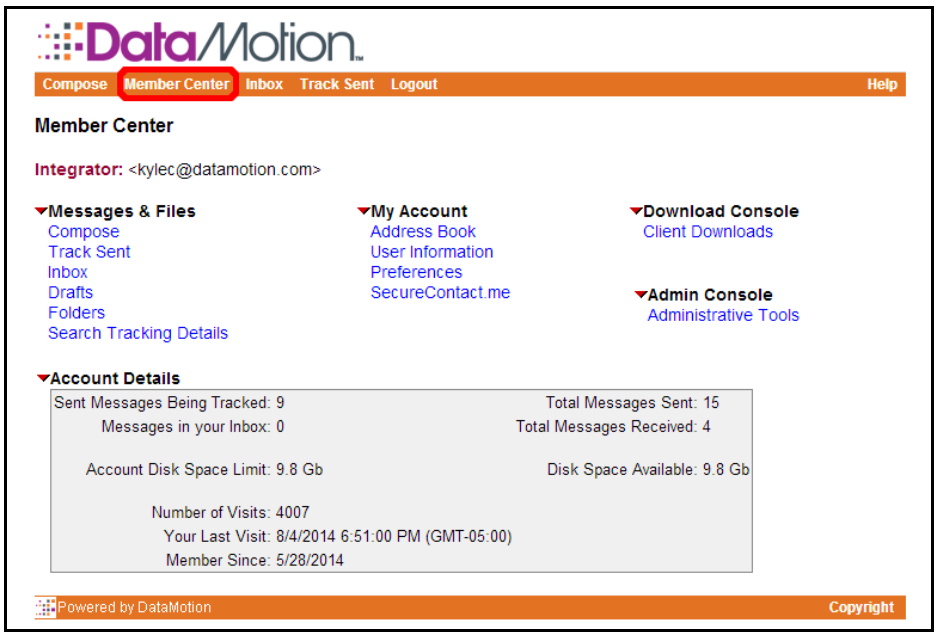
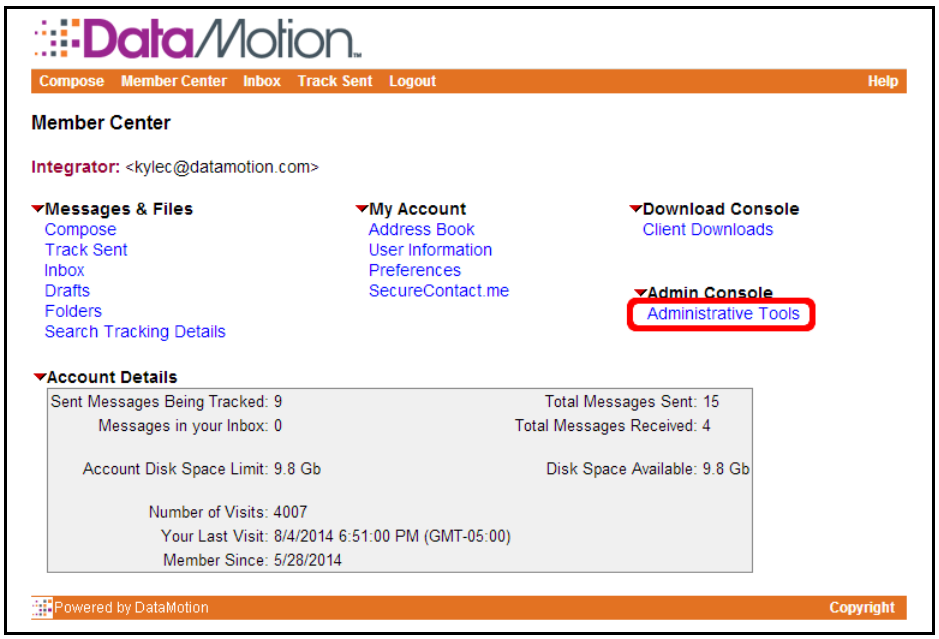
ENABLING/DISABLING AUTOMATIC RECIPIENT ACCOUNTS

1. In the heading bar, click the **Member Center** link.



2. Click the **Administrative Tools** link.



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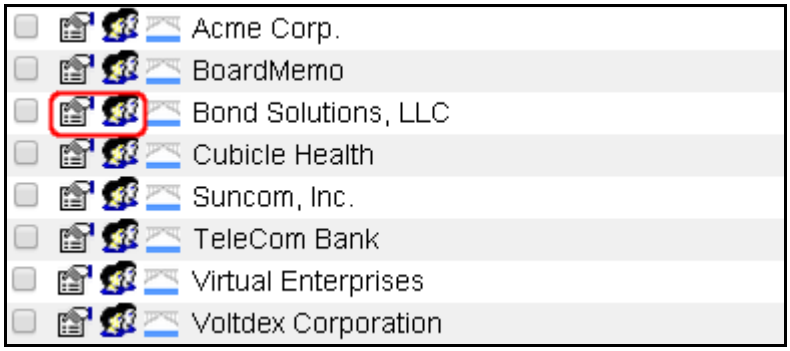
3. Click **Administer your corporate accounts** link.

4. Scroll to your company and click the icon.



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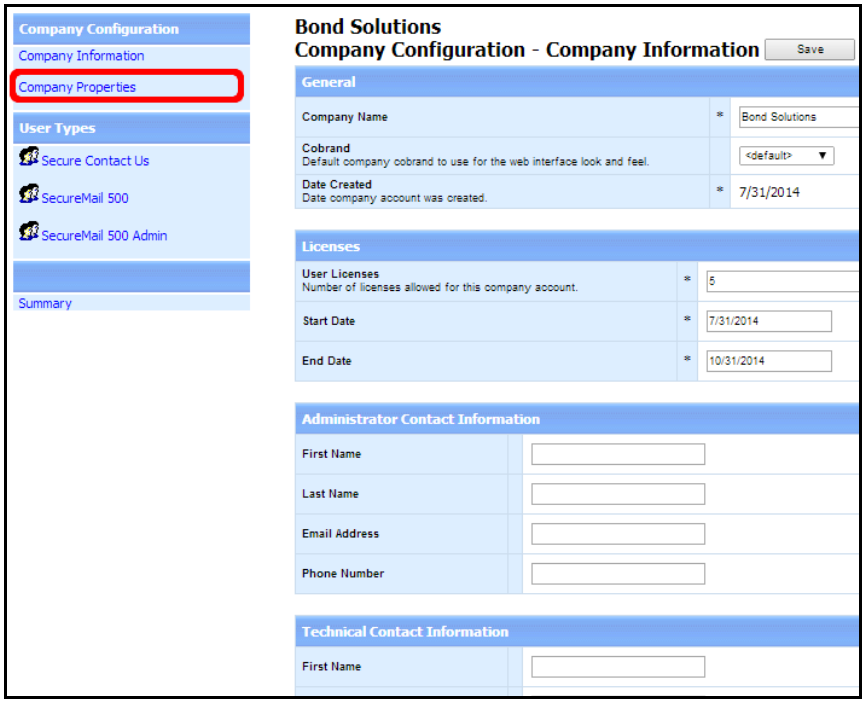
5. Click the **Company Properties** link in the Company Configuration Sidebar.



6. Find the **Notify sender on Account Auto Creation** (First in the list under **Users** section) and set it to your desired setting:

   » **Off:** Sender is not notified and recipient account is auto-created.

   » **On:** Recipient account is auto-created, but, rather than notifying the newly created user, it will send a different notification to the sender instead.

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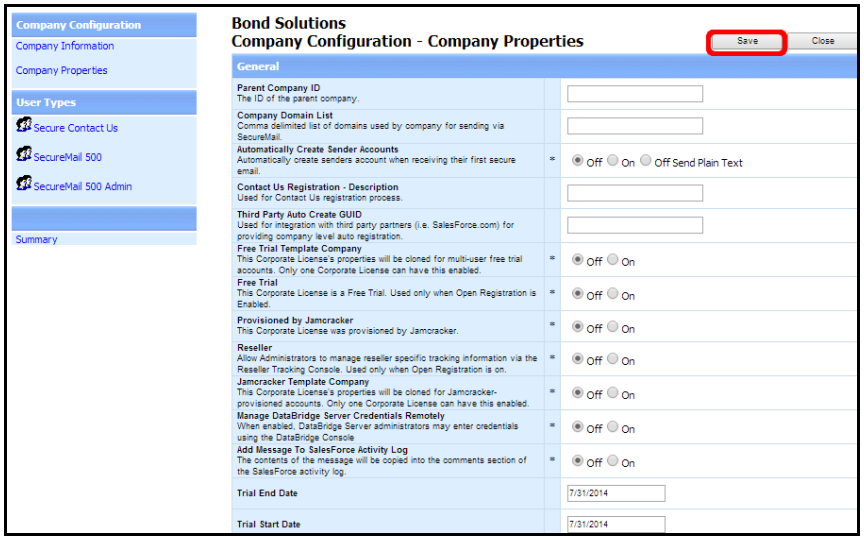
7. Press the **Save** button.



8. If this completes the configuration tasks you want to accomplish, make sure to log out of the portal when you're done.

* * *

This represents the end of the *DataMotion SecureMail On-Premises Configuration Guide.*

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