



DataMotion Secure Platform Administration Guide

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Part # 050078–01

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TABLE OF CONTENTS

ABOUT THIS PUBLICATION 7

ABOUT THE DATAMOTION SECURE PLATFORM.....	7
INTENDED AUDIENCE	7
DATAMOTION SECURE PLATFORM OVERVIEW	8
PRODUCT TERMINOLOGY	8
HOW TO USE THIS PUBLICATION.....	8
RELATED INFORMATION.....	9
DataMotion Documentation.....	9

1 DATAMOTION SECURE PLATFORM COMPANY ADMINISTRATION 10

DATAMOTION SECURE PLATFORM FEATURE OVERVIEW.....	10
DataMotion Secure Platform Features	10
DataMotion Secure Platform Company Cobranding	11
DATAMOTION SECURE PLATFORM COMPANY ADMINISTRATION OVERVIEW ..	11
Managing Company Settings.....	11
Adding UserName to Messages via Custom Mailbox.....	17
Custom Non-Delivery Receipt (NDR) when using Custom Mailbox	18

2 COMPANY BRANDING

19

COBRANDING THE WEB PORTAL 19

What is Company Cobranding? 19

Configuring your Tenant Cobrand 20

3 MANAGING YOUR USERS

21

USER MANAGEMENT 21

Managing Account Types 21

Privilege Levels 22

Account Types Settings 23

Default Account Types 26

Creating Account Types 26

Deleting Account Types 28

Managing User Accounts 29

Adding New Accounts 30

Searching and Filtering User Accounts 32

Deleting User Accounts 33

Moving Users to Different Account Types 34

4 SYSTEM REPORTS

36

REPORTS 36

Report Dashboard 36

Messages Sent 37

User Counts 41

Login Counts 42

Account Type Settings History Report 43

Company Settings History Report 44

Login Report 45

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.

About This Publication

ABOUT THE DATAMOTION SECURE PLATFORM

DataMotion is a leading provider of secure digital communications, enabling organizations in regulated industries—such as financial services, healthcare, and government—to exchange sensitive information with confidence. Our Secure Message Center empowers businesses to facilitate seamless, compliant, and user-friendly interactions through secure email, messaging, and document exchange.

Designed for security, efficiency, and ease of integration, DataMotion's platform ensures that administrators can manage secure communications effortlessly while meeting stringent compliance requirements like GLBA, HIPAA, and PCI DSS. With end-to-end encryption, zero-trust architecture, and seamless API integrations, our solutions enhance both customer experience and operational productivity.

This Secure Message Center Admin Guide provides a detailed overview of key administrative functions, helping IT and security teams configure, manage, and optimize their secure messaging environment with minimal effort. Whether you're setting up policies, managing users, or integrating with enterprise applications, this guide serves as a comprehensive resource to maximize the value of DataMotion's secure communication solutions.

INTENDED AUDIENCE

This publication is intended for a technical audience, including system administrators and system integrators, primarily those who are responsible for the management of the DataMotion Secure Platform. They are not expected to be security experts, but knowledge of security policies and email is helpful.

Additional technical documentation, as well as user documentation, is also available from DataMotion. See [DataMotion Documentation](#) (on page 9).

DATAMOTION SECURE PLATFORM OVERVIEW

The following information describes the DataMotion Secure Platform, including the components of the User Interface (for end-users) as well as the System Interface (for developers). While an understanding of the DataMotion Secure Platform is not explicitly required, this broader picture of the DataMotion Secure Platform may interest those who like to understand the larger context for what they are doing.

DataMotion offers technological architecture with its Secure Platform that is mature, robust, scalable and time-tested.

PRODUCT TERMINOLOGY

Because the various technology components 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:
DataMotion Secure Message Center	Secure Message Center or SMC

HOW TO USE THIS PUBLICATION

The *DataMotion Secure Platform Administration Guide* contains detailed information on the integration, maintenance, and administration tools provided by DataMotion to companies implementing and customizing DataMotion Secure Platform.

The chapters are written independently and can stand alone to minimize dependencies between them. The content is organized as follows:

About This Publication.

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

Chapter 1) DataMotion Secure Platform Company Administration

Describes how to manage your DataMotion Secure Platform company settings which affect how messaging, onboarding, and other areas of the platform will function for your tenant.

Chapter 2) Company Branding

Describes how to brand your tenant's Secure Message Center to suit your organization's branding needs.

Chapter 3) Managing Your Users

Describes how to manage your users including adding, deleting, and editing users. Also, this section describes the Account Type settings that are available and how to configure them for users.

Chapter 4) System Reports

Describes all available reports on the system and how to run each report.

RELATED INFORMATION**DATAMOTION DOCUMENTATION**

■ *DataMotion Secure Platform User Guide* (part # 050072)

Provides instructions for general users to utilize the features within the Secure Platform and specifically the Secure Message Center which is the user interface of the DataMotion Secure Platform.

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

1

DataMotion Secure Platform Company Administration

DATAMOTION SECURE PLATFORM FEATURE OVERVIEW

The DataMotion Secure Platform provides secure message delivery with integrated tracking. Designed to easily fit into existing work flows, the DataMotion Secure Platform leverages standards-based technology such as SMTP, SSL, TLS and AES encryption to ensure compatibility with how you work and while providing maximum security.

DATAMOTION SECURE PLATFORM FEATURES

The DataMotion Secure Platform is a highly flexible platform which can provide a variety of secure transport services for your organization. With the DataMotion Secure Platform, your organization can securely send messages using a variety of methods.

A short list of features available to you through DataMotion Secure Platform is:

- Secure message delivery.
- No software is required by the recipient.
- Web interface for sending, receiving, and tracking messages.
- Customization of the web portal user interface with company cobranding for a branded user experience.
- Multiple delivery methods for secure messages including web notifications, TLS plain text.
- Large attachment delivery outside the limits of your mail servers.
- Message tracking including when it was delivered and when it was opened.
- Automatic message expiration.
- Secure replies from recipients.

DATAMOTION SECURE PLATFORM COMPANY COBRANDING

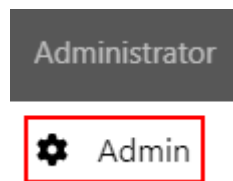
Company Cobranding is a feature of the DataMotion Secure Platform that allows an organization/company to place its brand identity on the DataMotion Secure Message Center. The simplest cobranding can include a company logo (with a hyperlink on the image), a custom color, and other options.

Cobranding can reinforce one's brand identity, as well as provide a familiar look and feel that encourages adoption of the DataMotion Secure Platform by employees and customers.

DATAMOTION SECURE PLATFORM COMPANY ADMINISTRATION OVERVIEW

DataMotion Secure Platform **Company Administration** allows you to manage the DataMotion Secure Platform accounts for your company or organization. All administrators shall have an additional area to access while on the Secure Message Center. This can be reached by:

1. Login to the Secure Message Center at <https://scp.datamotion.com> as an administrator user.
2. Click the profile image at the top right of the screen (should be a circle with a letter inside).
3. In the drop-down, select Admin.

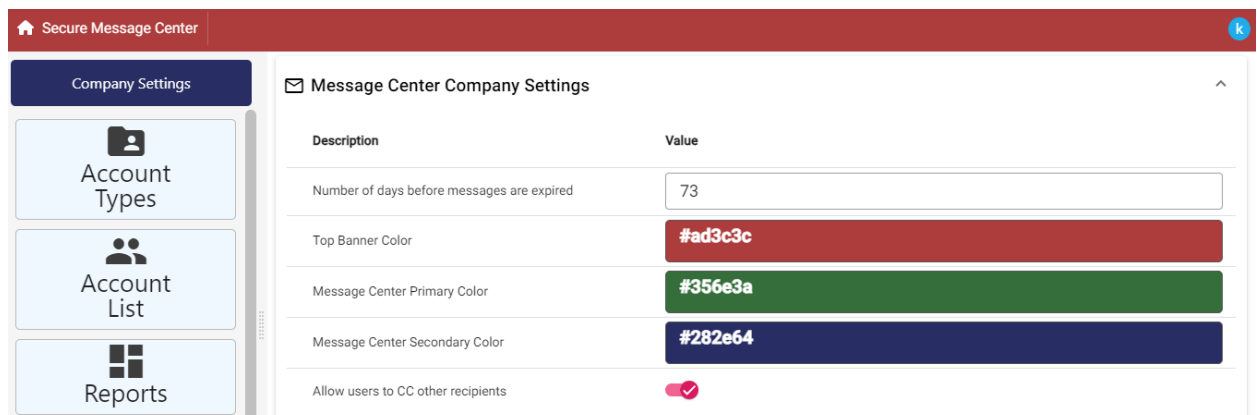


All company administration regardless of the type shall occur from within the administration screen that loads upon clicking Admin above.

NOTE: Every setting within the administration user interface will automatically save whenever a change is made. Please ensure that you do not mistakenly edit any setting as the change shall be applied immediately.

MANAGING COMPANY SETTINGS

Administrators on the platform have the capability to manage all available company settings for their own users. This shall be performed via the Message Center Company Settings area of the administration interface. After performing the steps in the DataMotion Secure Platform Company Administration Overview section you shall see something like this:



Secure Message Center

Company Settings

Account Types

Account List

Reports

Message Center Company Settings

Description	Value
Number of days before messages are expired	73
Top Banner Color	#ad3c3c
Message Center Primary Color	#356e3a
Message Center Secondary Color	#282e64
Allow users to CC other recipients	☒

Within the Message Center Company Settings section, you will have the ability to configure the following:

NOTE: As stated previously any changes to these settings shall be automatically applied. Please ensure that you are certain of the edits/changes you wish to make.

NOTE: There are a number of settings below that will require assistance from DataMotion Support in order to fully utilize them. These include the following:

- Message Center URL
- Notification Email
- PlainText Delivery
- Custom Mailbox Domain
- Enable Virus Scanning
- Enable Malicious URL Scanning

NOTE: If you do have values for any of the settings above, they should not be changed without first contacting DataMotion.

Description	Default Value	Notes
User Interface Type	MessageCenter	Controls the default message interface that user's will see when they access the Secure Message Center.

Description	Default Value	Notes
Session inactivity limit in minutes	30 Can be set to any number of minutes	Sets the amount of time a user can leave their session active for without any interaction. Once an idle session reaches the threshold that has been set the user will be logged out of the platform.
Number of days before messages are expired.	90 Can be set to any number of days	Any messages that reaches this threshold will be deleted.
Top Banner Color	Hex Color Can be any valid hex code in the #xxxxxx format	Controls the color utilized by the uppermost portion of the Secure Message Center.
Message Center Primary Color	Hex Color Can be any valid hex code in the #xxxxxx format	Controls the color utilized for the Secure Message Center (i.e. Inbox screen, Compose screen, etc.)
Message Center Secondary Color	Hex Color Can be any valid hex code in the #xxxxxx format	Controls the color utilized by secondary parts of the Secure Message Center (i.e. the + Compose button).
Allow users to CC other recipients.	On/Off	Toggling this option will either grant or remove the Cc option for users on the Compose screen.
Allow users to Bcc other recipients.	On/Off	Toggling this option will either grant or remove the Bcc option for users on the Compose screen.

Description	Default Value	Notes
Message Center URL	The URL for the Secure Message Center.	This value is the URL for the Secure Message Center that shall be utilized in all message notifications. DO NOT change this unless you are certain that notifications can route to the URL being entered.
Notification Email	The notification email that will be used as the sender for all notices.	Please note that this email address must exist on the platform in order to be utilized as the notification sender. DO NOT change this to a user that does not exist. NOTE: Domain Keys Identified Mail (DKIM) and Sender Policy Framework (SPF) must be configured on the platform in order for this setting to function correctly. This involves the assistance of DataMotion as failure to properly configure these can result in blacklisting which can prevent notifications from being delivered to users.
Language for Notification Emails	English (US)	This drop-down contains a list of all available languages that can be used in delivery notifications.
Time zone Displayed in Notifications	(UTC-05:00) Eastern Time (US & Canada)	This drop-down contains a list of all available time zones that can be used for display in the delivery notifications.

Description	Default Value	Notes
PlainText Delivery	On/Off	Determines whether messages sent will be delivered via notification or as plain text directly to the recipient. NOTE: Domain Keys Identified Mail (DKIM) and Sender Policy Framework (SPF) must be configured on the platform in order for this setting to function correctly. This involves the assistance of DataMotion as failure to properly configure these can result in blacklisting which can prevent notifications from being delivered to users.
Use 24 hour clock	On/Off	Controls whether the SMC will use the 24 hour clock (0:00 – 23:59) or the 12 hour clock (12:00 AM – 12:00 PM)
Custom Mailbox Domain	None Enter the custom domain for your mailbox in this field	This field controls your custom mailbox domain that will allow you to add the username field to your messages. Please note that you must contact DataMotion Support for assistance with setting up this feature. For more information on how this feature works see below.
Enable Virus Scanning	On/Off	When enabled all messages shall be scanned for viruses. Please note that you must contact DataMotion Support for assistance with setting up this feature.

Description	Default Value	Notes
Virus Scanning Fallback Policy	Deny/Allow	In the event virus scanning becomes unavailable messages will be denied or allowed depending on this toggle.
Enable Malicious URL Scanning	On/Off	When enabled all messages shall be scanned for malicious URLs. Please note that you should contact DataMotion Support for assistance with setting up this feature.
URL Scanning Fallback Policy	Deny/Allow	In the event that URL scanning becomes unavailable messages will be denied or allowed depending on this toggle.
Malicious URL Scanning Replacement Text	### URL BLOCKED ###	In the event that a malicious URL is found, it shall be replaced with the text contained in this field.
Tenant Name	Company Name	Sets the tenant name to be used by the company.
Identity Provider Autoselection	Okta//	The identity provider that will be utilized when authenticating to the SMC.
Identity Provider Filter	None Set the identity filter in this field. Must type in a valid identity provider if used.	When this field has identity providers entered, it will filter these for usage by any new users being onboarded to the platform.
Show Login screen background graphics	On/Off	Renders background graphics on the Login screen.

Description	Default Value	Notes
Allow Login screen background motion	On/Off	Allows background graphic motion on the Login screen (when set to On the Login screen the pattern will move).

ADDING USERNAME TO MESSAGES VIA CUSTOM MAILBOX

NOTE: When configuring this feature, please reach out to DataMotion Support for assistance as their help is required for configuration.

Using the Custom Mailbox feature will allow your users User Name to be included in any message that is sent or received on the platform via Plain Text Delivery. This requires a company to configure a custom mailbox which specifically includes:

- Custom Mailbox Domain – A text field for entering your desired domain.

Custom Mailbox Domain

NOTE: The Custom Mailbox Domain will have the text “dmid” added to your domain to the left of your input. Do not enter the text “dmid” itself into the field as it will be automatically added.

When sending messages via Plain Text Delivery the format of the From address with this feature is as follows:

"{displayName}" {userName}@dmid.yourdomain.com

A practical example of this would be:

“John Doe” <john@dmid.company.com>

In order to address a user by their username when sending a message to them (this would be the To field when creating a message) using this feature, the format would be as follows:

"{displayName}@{emailAddress}" {userName}@dmid.yourdomain.com

A practical example of this would look like:

“John Doe@john@company.com” <johndoeusername@dmid.yourdomain.com>

NOTE: A mail rule will have to be entered into your email server (such as Microsoft Exchange) to appropriately process messages with one of these Custom Mailbox Domains.

Custom Non-Delivery Receipt (NDR) when using Custom Mailbox

NOTE: You will need DataMotion Support's involvement in order to fully implement this feature. Please reach out to them at support@datamotion.com for assistance.

When you are using the Custom Mailbox feature it is also possible to have custom NDRs put in place to correspond with your domain. These can be created in both text format and html format by customizing Ndr.txt and Ndr.html files. Once you have completed your custom notifications, please reach out to DataMotion Support as they will need to install the Ndr.txt and Ndr.html files. When our support staff have completed installation, it is advised that you test your custom NDRs to ensure they have the proper formatting and appearance that you anticipate.

2

Company Branding

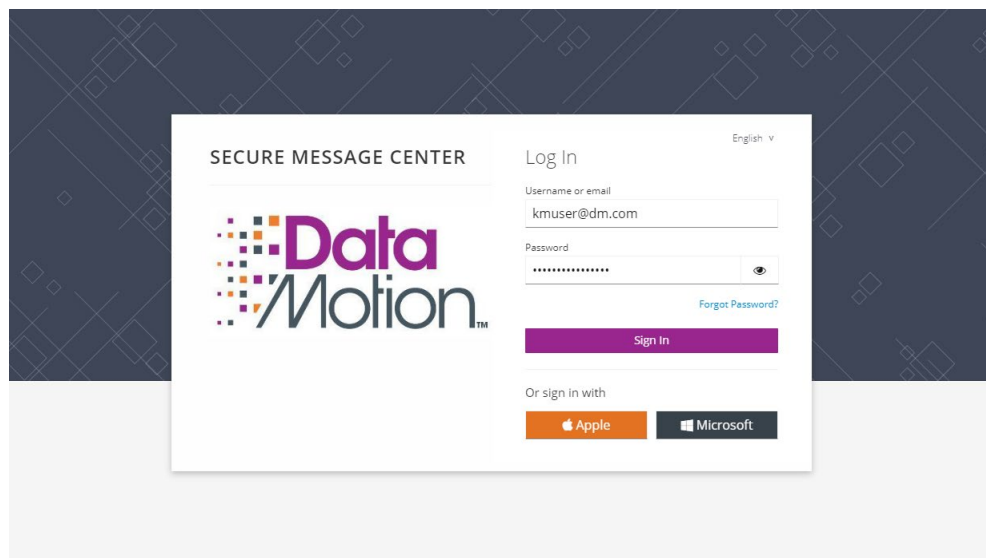
COBRANDING THE WEB PORTAL

WHAT IS COMPANY COBRANDING?

Company Cobranding allows a company or organization to place its brand identity on the DataMotion Secure Message Center. With cobranding, the message delivery notification sent to DataMotion Secure Platform recipients contain a link with a cobrand tag. When DataMotion Secure Platform **recipients** use this link to access the portal, it will take them to the cobranding portal. Also, when **senders** log in to the portal, it will display their company's cobranding.

An example of a co-branded web portal with DataMotion's logo and color scheme is below:

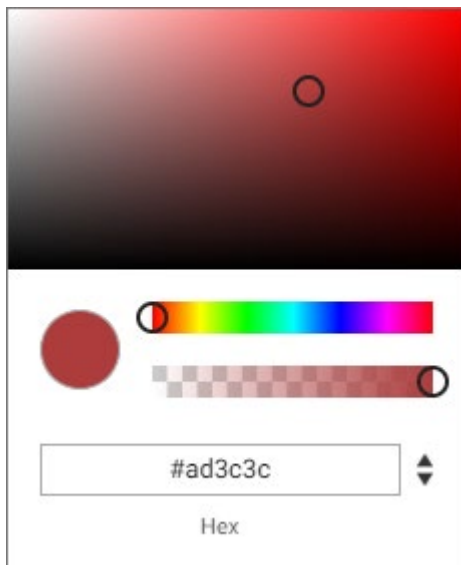
Example of a Co-Branded Secure Messaging Center



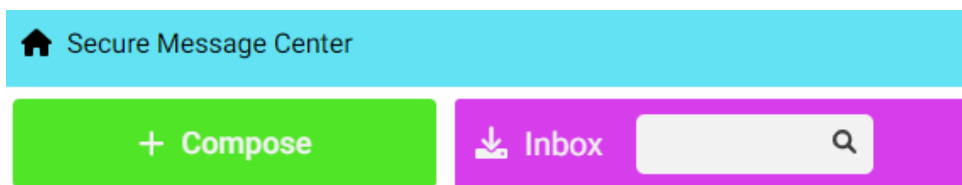
CONFIGURING YOUR TENANT COBRAND

All cobranding is performed from the company settings area described in the Managing Company Settings section. The settings which are configurable and control the cobrand are the following:

- Top Banner Color – Controls the color utilized by the uppermost portion of the Secure Message Center.
 - Message Center Primary Color – Controls the color utilized for the Secure Message Center (i.e. Inbox screen, Compose screen, etc.)
 - Message Center Secondary Color – Controls the color utilized by secondary parts of the Secure Message Center (i.e. the **+ Compose** button).
- » Clicking on the color for any of these settings will open a color picker. Entering a Hex color manually via the text box is also possible.



- » Changing the color will automatically take effect and change the colors that are displayed.
- » This will result in something like this:



NOTE: Changing the logo on the Login screen requires assistance from DataMotion Support. Please contact them at support@datamotion.com to have the logo changed to an image that you provide to the support team.

3

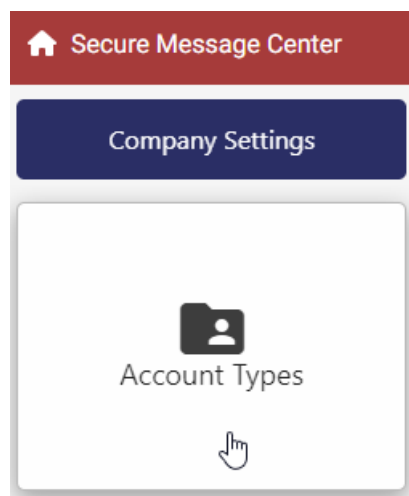
Managing Your Users

USER MANAGEMENT

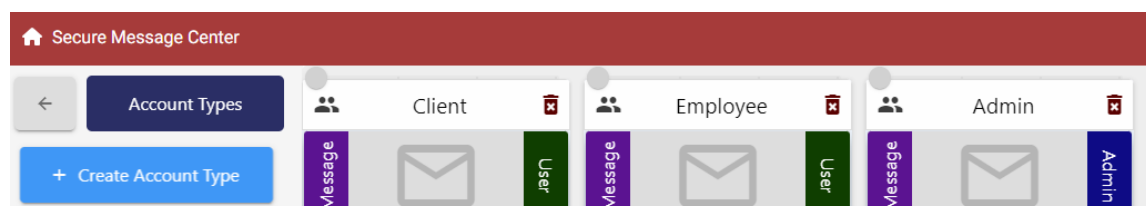
To provide users with access to DataMotion Secure Platform, you need to create accounts and have them assigned to the proper Account Type. Once users have been created, they will be allowed to login and begin sending secure messages. Both Account Type management as well as user management via the Account List area can be accessed from the main Admin view at any time. The sections below describe managing and both users and account types that can be assigned to them.

MANAGING ACCOUNT TYPES

Control over account types and their settings is performed entirely from the Account Types area of the admin settings. Accessing this area is simple and done by selecting Account Types from the left side of the screen.

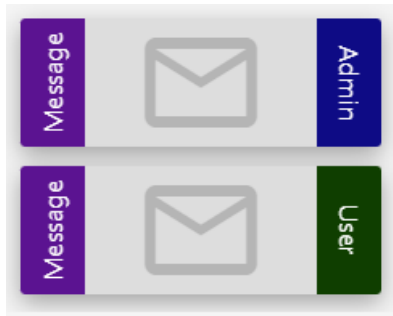


After clicking on the Account Types area, the Account Types settings will appear.



Privilege Levels

There are two types of overarching privileges for users overall. These consist of User and Admin, and these privileges shall appear as selectable (and draggable) cards on the left side of the screen.



These cards will appear over each Account Type and determine the functionality that a user within that Account Type will have access to.

In particular, any Account Type with the Admin card will have the capability to access the settings described throughout this document and perform all administrative functions. Account Types with the User card shall be regular users without any administrative access whatsoever.

Account Types Settings

While the privilege levels determine whether a user shall have administrative access to the Secure Message Center, the Account Type settings themselves determine the overall user experience and functions that will be available to the user. These settings do not differ regardless of privilege level and are described below:

Setting	Value	Notes
List of domains that new users with matching email addresses will be automatically provisioned into. (* = wildcard)		This setting is blank by default, but accepts domains entered in a format like: dm.com sub.dm.com *.dm.com Any users who receive messages or are created and have an email matching an entered domain shall be auto-assigned to the Account Type where this domain is entered.
User Interface Type	Message/Feed	Message is the default value. Determines the user interface that the user will have when accessing the Secure Message Center.
Number of days before messages are expired	90	Default value is 90 days. Any sent messages will expire once the number of days entered in this field has passed.
Allow user to view message tracking information	On/Off	On is the default value.
Allow user to author messages in the web portal	On/Off	On is the default value.

Setting	Value	Notes
Send scope for new messages	World/None/Company	World is default.
Forward scope for new messages	World/None/Company	World is default.
Reply scope for new messages	World/None/Company	World is default.
Allow users to Cc other recipients	On/Off	On is default.
Allow users to Bcc other recipients	On/Off	On is default.
Message Center URL	SMC portal URL	This is the URL for the SMC web portal.
Language for Notification Emails	English	This setting determines the language that will be used for message notifications.
Time zone Displayed in Notifications	(UTC-5:00)	Controls the time zone that will be used in message notifications.
PlainText Delivery	On/Off	Controls whether or not users in the Account Type will receive messages in plain text. NOTE: Just like the Company level version of this setting you must have DKIM and SPF configured on the platform in order for this setting to function correctly. This involves the assistance of DataMotion as failure to properly configure these can result in blacklisting which can prevent notifications from being delivered to users.

Setting	Value	Notes
Use 24 hour clock	On/Off	Determines whether or not the user will have a 24 hour clock 0:00-23:59 or a 12 hour clock 12AM-12PM
Enable Virus Scanning	On/Off	Toggles virus scanning for all messages sent by the user. As with the Company level version of this setting you must contact DataMotion Support for assistance with setting up this feature.
Virus Scanning Fallback Policy	Allow/Deny	Toggles the fallback policy for the Account Type where a message can be allowed or denied to send in the event of virus scanning detection.
Enable Malicious URL Scanning	On/Off	Toggles URL scanning for all URLs within messages. When on malicious URLs will be blocked. As with the Company level version of this setting you must contact DataMotion Support for assistance with setting up this feature.
URL Scanning Fallback Policy	Allow/Deny	Toggles the fallback policy for the Account Type where a message can be allowed to send in the even of malicious URL scanning detection.

Setting	Value	Notes
Malicious URL Scanning Replacement Text	###URL Blocked###	A free form field where text can be entered of which will be used as replacement text whenever a malicious URL is detected.
Identity Provider Autoselection	Microsoft	When set, users will be auto logged in (if already signed into a Microsoft Account) or re-directed to login to the SMC.
Identity Provider Filter	Empty	Will only show users in the Account Type the identity providers contained in the text field.

Default Account Types

In regard to the Account Types themselves, by default, there will be four account types provided. These include the following:

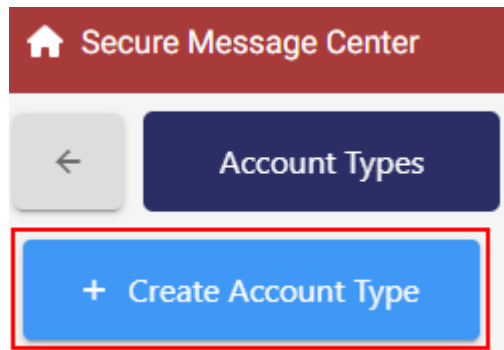
- Admin
- Advisor
- Client
- Prospect

Creating Account Types

In the event that your organization requires additional Account Types besides the provided defaults, it is possible to create new ones. There is no limit to how many Account Types can be created and the process for creating them is as follows:

NOTE: These steps assume you are an Admin who has already accessed the Account Types Settings area.

1. Click the + Create Account Type button on the left-hand side of the screen.



2. Enter a name for the Account Type in Enter Account Type Name window.
3. Click the Save button.

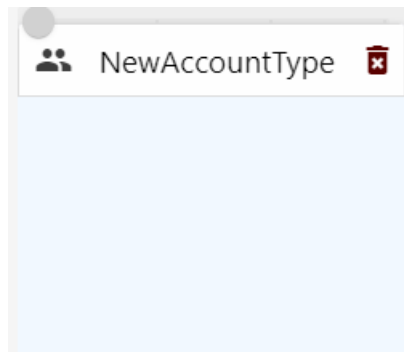
Enter Account Type Name

Account Type Name

NewAccountType **1**

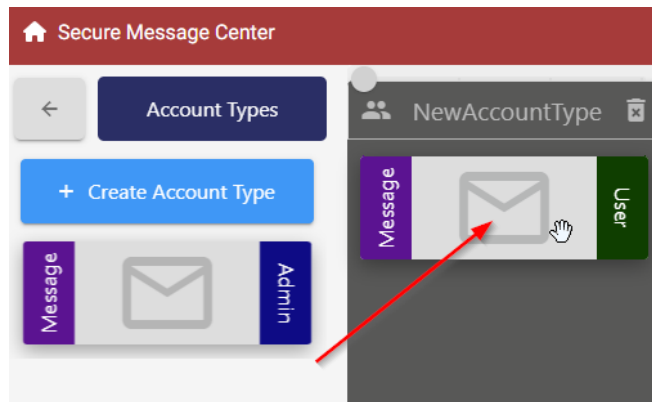
2 Save Cancel

4. An empty account type will be created with the name you provided.



NOTE: An empty Account Type has no privileges or settings in place. Continue to step 5 in order to grant privileges and settings to this newly created Account Type.

5. From the left-hand side of the screen choose either the User or Admin privilege card.
6. Click and drag this card to the new but empty Account Type created during this process (the Account Type will highlight in gray when the card can be released).



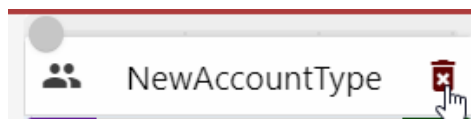
7. Once the card has been placed, the settings (in their default state) will be loaded for the Account Type.

A screenshot of the 'NewAccountType' settings form. At the top, there's a header with a person icon, 'NewAccountType', and a trash icon. Below this, there's a 'Message' slot (purple) and a 'User' slot (green). The main content area has a text input field for 'List of domains that new users with matching email addresses will be automatically provisioned into. (* = wildcard)'. Below this is a 'User Interface Type' dropdown menu with 'Message' selected. At the bottom, there's a 'Number of days before messages are expired' field with a refresh icon and the value '90'.

If you wish to create additional Account Types, simply repeat the steps in this section for each one desired.

Deleting Account Types

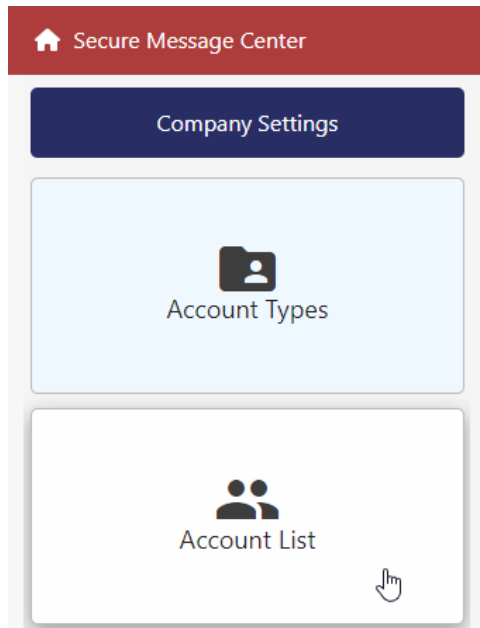
Any Account Type can be deleted by simply clicking on the trash can icon on the right side of the Account Type card.



NOTE: Do not delete all Account Types as there must be at least one User and one Admin Account Type for users to be assigned to.

MANAGING USER ACCOUNTS

To manage your user accounts, you need to login and access the **Admin** area of the SMC in the same manner as accessing the Company Settings. Once you have reached the Admin view, you can select the Account List from the left side of the screen.



In general this view will look something like the following:

	Email ^	User Name	First Name	Last Name	Display Name	Account Type	Date Created
☐	\$(username)					Employee	Jan 12, 2024
☐	'autouser@datamotion.com		apostrophe	user1		AccountFor Automation	Aug 8, 2023
☐	'user21@datamotion.com		User	21	User 21	Prospect	Dec 13, 2023
☐	/autouser@datamotion.com				/autouser@datamotion.com	AccountFor Automation	Aug 8, 2023
☐	'autouser@datamotion.com				'autouser@datamotion.com	AccountFor Automation	Dec 11, 2023

While on this screen you will be able to:

- Create an account and edit those accounts.
- View a list of all users within the tenant which can be sorted and searched for.
- Delete an account.
- Move accounts into a different Account Type.

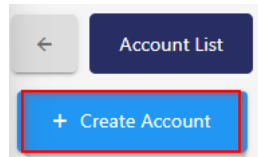
NOTE: Each component will have its own section that further describes how to utilize the area in question.

Adding New Accounts

It will likely be necessary to add new users to your tenant manually from time to time or as the need arises. In order to create accounts manually you should perform the following steps:

NOTE: these steps assume you are already on the Account List view shown above.

1. Click the + Create Account button on the left side of the screen.



- a. The Create Account view will open.
2. Enter an Email Address.
 - a. (Optional) You can check the Email Verified checkbox if you have already verified this email address.
 3. Enter a First Name.
 4. Enter a Last Name.
 5. The Display Name will auto populate depending on what is entered for steps 3 and 4.
 6. (Optional) Give the user a password.
 - a. Confirm the Password.
 - b. If not performed, the user will be required to setup their own password upon receiving the account registration notice.
 7. (Optional) If desired you can require the user to update their password, profile, or both by clicking the Update Password and/or Update Profile buttons.
 8. Select an Account Type for the user.
 9. Click the Save button.

Create Account

Email Address* 1 ☐ Email Verified

First Name* 2 Last Name* 3

Display Name 4

Require on first login

Password Confirm Password

Editing an Account

All accounts in the Account List can be edited at any time by simply clicking the pencil icon on the right most side of the row.

	Email ^	User Name	First Name	Last Name	Display Name	Account Type	Date Created	
☐	'autouser@data motion.com		apostrophe	user1		AccountFor Automation	Aug 8, 2023	

This will open an Edit Account view which is similar to the one shown in the Adding New Accounts section and you will be able to edit any information related to the user.

NOTE: There is one exception to this in that you cannot edit the user's Email Address.

Edit Account

Email Address* Cannot Be Edited

User Name

First Name* Last Name*

Display Name

Require on first login

Password Confirm Password

Searching and Filtering User Accounts

Depending on the number of accounts your company has, it may be necessary to search for or filter the list presented on the screen to find a particular user in question. The most straightforward option is to simply search for a user in question should know that user's email address or other information. This can be done by entering information into the Filter text area and the Account List will filter based on the information entered.

The screenshot shows the 'Account List' interface. On the left, there is a sidebar with a back arrow, a search bar containing 'user@dm.com', and two filter buttons: 'Active' (highlighted in yellow) and 'Deleted'. The main area displays a table of user accounts.

	Email ^	User Name	First Name	Last Name	Display Name	Account Type	Date Created
☐	deletedu ser@dm: com		deleted	uswer	deleted uswer	AccountFor Automation	Mar 22, 2024
☐	kmuser @dm.co m		KM	User	KM User	Admin	Mar 18, 2024
☐	Mobuser @dm.co m		11	22		Client	Oct 5, 2023

NOTE: An exact match is not necessary in order to retrieve results as shown in the image above.

Further filtering is possible by clicking the Active or Deleted options. When doing this clicking either option will disable the other. Clicking Deleted will only show Active accounts whereas clicking Active will only show Deleted accounts. Click the same option again to re-enable both filter options.

Clicking Active only shows Deleted accounts

The screenshot shows the 'Account List' interface with the 'Deleted' filter button highlighted in yellow. The table displays only the accounts that were previously marked as deleted.

	Email ^	User Name
☐	deletedu ser@dm: com	
☐	Mobuser @dm.co m	

Clicking Deleted only shows Active accounts

The screenshot shows the 'Account List' interface with the 'Active' filter button highlighted in yellow. The table displays only the accounts that were previously marked as active.

	Email ^	User Name
☐	kmuser @dm.co m	

Further filtering is possible via the Account Type cards as well if needed. Clicking an Account Type card will only show users within that specific Account Type in the account list in addition to any other filters that are in use. There is an example of this below:

Account List		Email ^	User Name	First Name	Last Name	Display Name	Account Type	Date Created
+ Create Account	☐	accountforreports@data-motion.com		acc	rep		AccountFor Reports	Feb 23, 2024
Filter X	☐	User062310041029@71abc.com				User062310041029@71abc.com	AccountFor Reports	Dec 6, 2023
Active Deleted	☐	User062310041034@71abc.com				User062310041034@71abc.com	AccountFor Reports	Dec 6, 2023
NewAccount Type Test acc1	☐	User062310041036@71abc.com				User062310041036@71abc.com	AccountFor Reports	Dec 6, 2023
AccountForAutomation AccountForReports	☐	User062310041038@71abc.com				User062310041038@71abc.com	AccountFor Reports	Dec 6, 2023
	☐	User062310041040@71abc.com				User062310041040@71abc.com	AccountFor Reports	Dec 6, 2023

NOTE: The above shows an Active filter and a selected Account Type which will only show active users within that specific Account Type. Various combinations are possible, and using different ones may be required to find specific users depending on how many your company has.

Deleting User Accounts

User accounts can be deleted from the Account List at any time by an administrator. To remove a user account (or multiple accounts):

1. Select the account(s) by checking the box at the left of the Email column.

⋮	Email ^	User Name
☒	accountforreports@data-motion.com	
☐	User062310041029@71abc.com	

2. Click three dots above the checkboxes at the top.

⋮	Email ^
☒	accountforreports@data-motion.com

3. In the drop-down click Delete.

Delete

4. In the confirmation pop-up click Yes.



Delete Account

Are you sure you want to delete
accountforreports@datamotion.co
m?

- The account will be deleted, and you can confirm this by seeing a red highlight and strikethrough through the user like the below.

	Email ^	User Name	First Name	Last Name	Display Name	Account Type
☒	deleted@ser@dm:com		deleted	uswer	deleted uswer	AccountFor Automation

Moving Users to Different Account Types

Users can be moved into different Account Types at any time and even be upgraded to administrative level via this functionality. To move a user into a different Account Type simply perform the following:

- Select the account(s) by checking the box at the left of the Email column.

	Email ^	User Name
☒	accountforreports@datamotion.com	
☐	User062310041029@71abc.com	

- Click three dots above the checkboxes at the top.

	Email ^
☒	accountforreports@datamotion.com

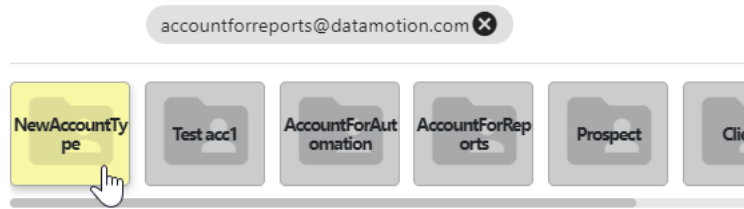
- In the drop-down select Move.

Delete

Move

4. In the pop-up select a different Account Type.

Pick an account type to move accounts into



5. Click Ok.

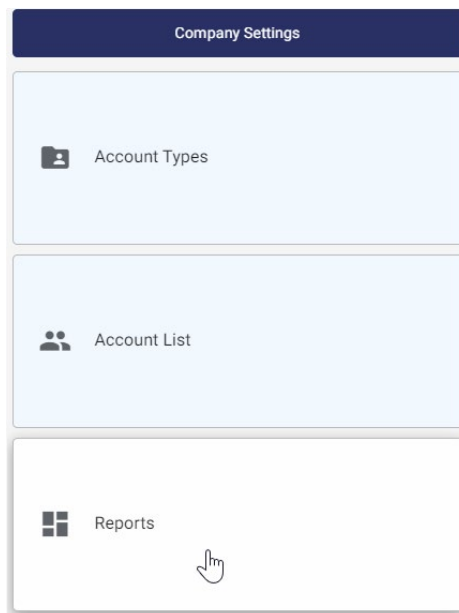
The user will be moved into the selected Account Type and if the account type has administrative privileges, they will then be able to access the Admin settings.

4

System Reports

REPORTS

DataMotion Secure Platform provides Administrators with a range of usage reports they can use to monitor and track how services are being used. As with all administrative functions the Reports view can be accessed from the main Company Settings view on the left side of the screen by clicking the Reports card as shown below:



REPORT DASHBOARD

The first area you will see upon accessing the Reports view is the Dashboard. This dashboard will contain the three main reports which are as follows:

- Messages Sent
- User Counts

- Login Counts

All reports on this dashboard mentioned above share common features including:

- Sorting by year or month (except for the User Counts report).
- Grid or chart view.
- The ability to download a report.
- A company selector drop-down should you have more than one company.

For brand new tenants this dashboard will likely have little to no data as there has not been much user activity, however once users are added, begin logging in, and sending messages you may see something like the following:



These reports will provide an overview of most user-related activities performed on the system, particularly the number of messages sent, and the users present within a tenant. Each report will be discussed in detail in the sections below.

Messages Sent

The Messages Sent report tracks all messages sent per account type and may vary in appearance depending on the number of Account Types your company possesses. The initial view for this report will be sorted as Messages Sent Per Account Type Per Month with each Account Type given a color code at the top of the report with corresponding bars in the graph chart.



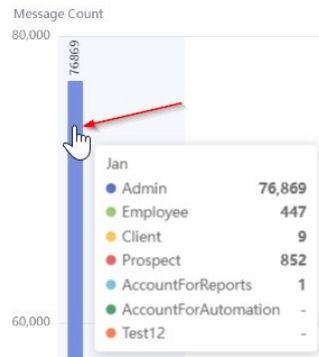
This report can be sorted by these Account Types shown at the top of the chart. Clicking on an Account Type (you can click multiple) will remove it from the view and the graph bars will adjust accordingly. The example below shows the same report from above but with the Admin Account Type disabled and the other Account Types adjust in the chart automatically.



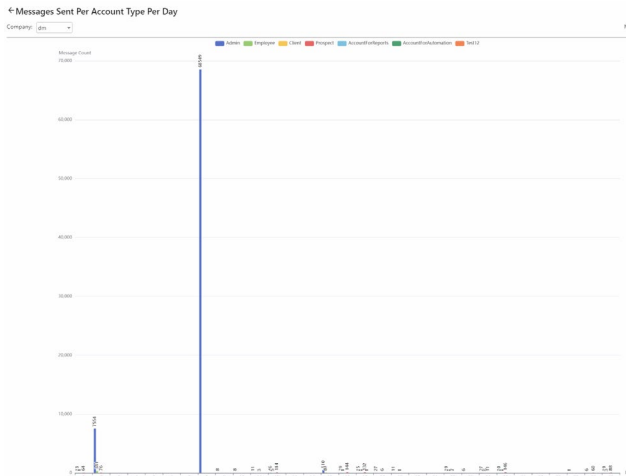
You can also sort this report by each day within a month and this can be done by clicking on a graph bar within the report.

Messages Sent Per Account Type Per Month

Company: dm



Once clicked the view will change to the Messages Sent Per Account Type Per Day view and change the yearly sorting option to a monthly sorting option.



The grid view of the report will also change to match and will look something like this:

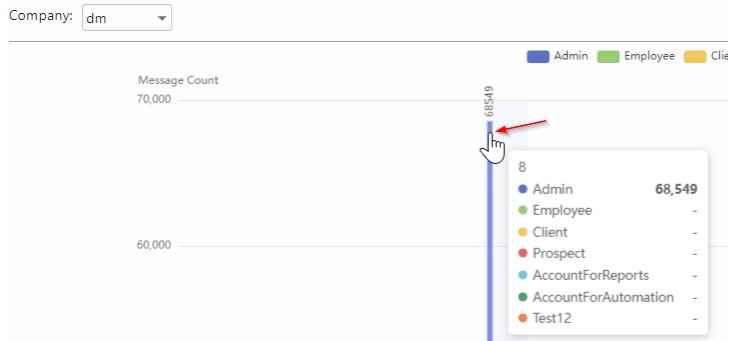
← Messages Sent Per Account Type Per Day

Company: dm Month: 2024 - 01

Company	Account Type	Day	Message Count
dm		2024-01-01	2
dm	Admin	2024-01-01	13
dm	Employee	2024-01-01	1
dm	Prospect	2024-01-01	64
dm		2024-01-02	4

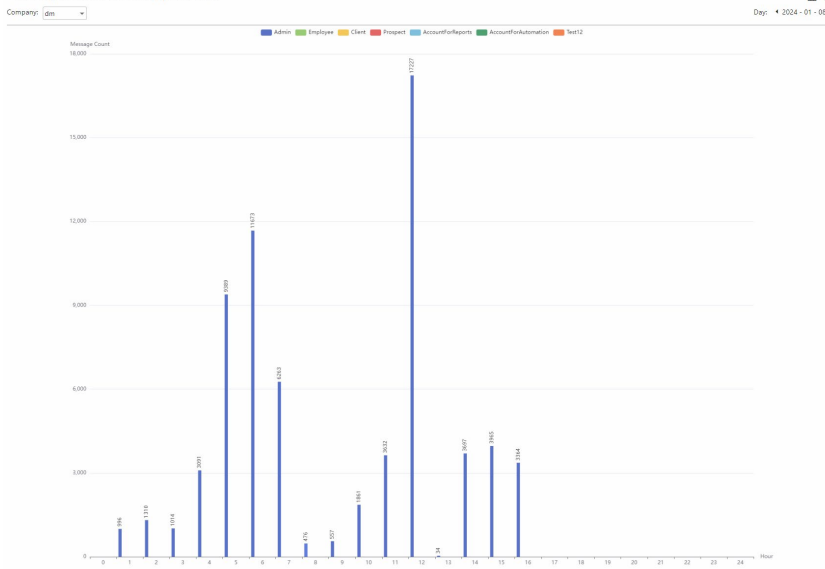
Even more granularity is possible and while in chart view you can click on a bar within the graph again to go to a Per Hour view if desired.

← Messages Sent Per Account Type Per Day



Once clicked you will be brought to the Messages Sent Per Account Type Per Hour report view and change the monthly sorting option to a daily sort.

← Messages Sent Per Account Type Per Hour



NOTE: The only way to change between Per Month, Per Day, and Per Hour report views is to click on one of the graph bars while in chart view, and changing back (can be done from chart or grid view) requires you to click the back arrow next to the report name like this:

← Messages Sent Per Account Type Per Day

When downloading a report the data contained in the .csv will be either per month within a given year if in the Per Month view, per day within a given month if in the Per Day view, or per hour within a given day if in the Per Hour view.

Messages Sent Per Account Type Per Month

Company:

Year: 2024

OR

← Messages Sent Per Account Type Per Day

Company:

Month:

OR

← Messages Sent Per Account Type Per Hour

Company:

Day:

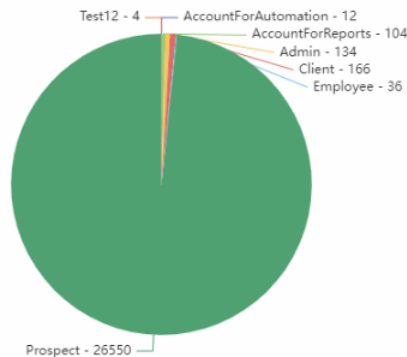
User Counts

The User Counts or Users By Account Type report is a fairly simple report that shows the current number of users present in each Account Type within your company. Each Account Type will be color coded, and the report will initially be presented as a pie chart as shown below:

Users By Account Type

Company:

AccountForAutomation - 12 AccountForReports - 104 Admin - 134 Client - 166 Employee - 36 Prospect - 26550 Test12 - 4



This report does not have any type of sorting by nature, and the downloaded report will always contain the same data.

Login Counts

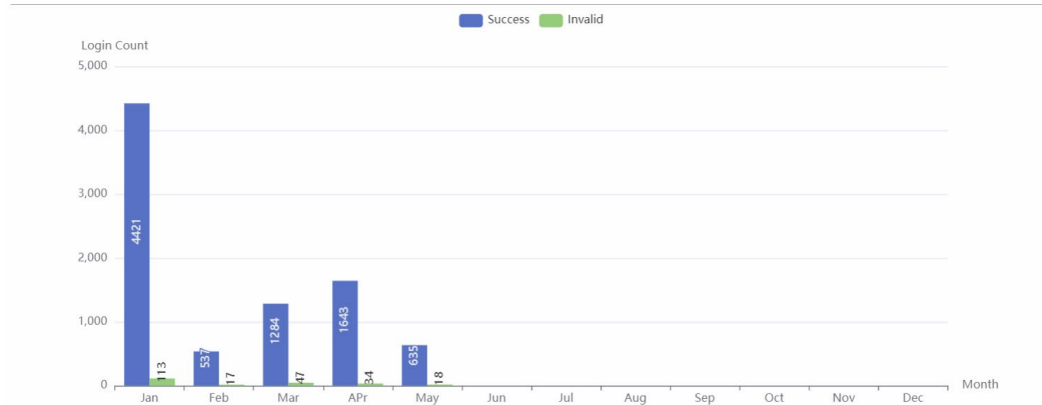
The Login Counts report will show both successful and invalid login attempts made for a given month, day, or hour depending on how granular your reporting requirements are.

Logins Per Month

Company: dm



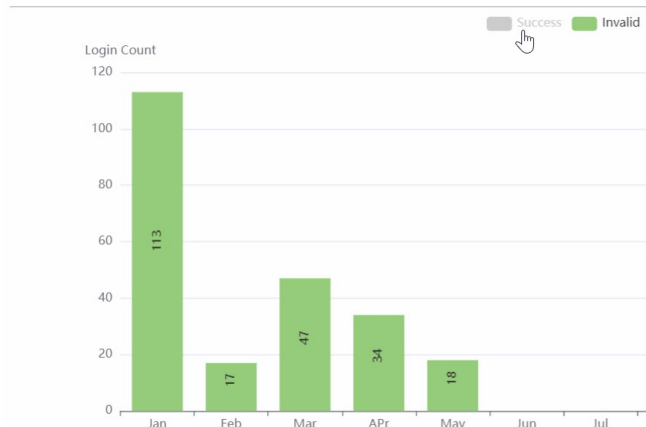
Year: 2024



While the default view shows both Success and Invalid you can click on either option to remove it from the report view and only show the other. In the example below Success has been clicked and only Invalid is displayed.

Logins Per Month

Company: dm



As with the Messages Sent report it is possible to change between Per Month, Per Day, and Per Hour report views by clicking on one of the bars in the graph while in chart view. The grid view will also change accordingly depending on the sorting that has been performed as will the downloaded report.

ACCOUNT TYPE SETTINGS HISTORY REPORT

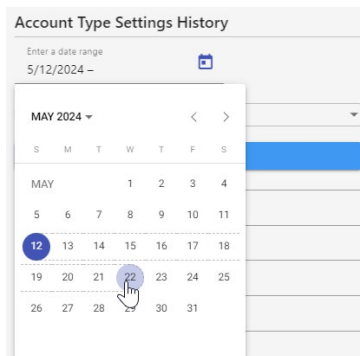
The Account Type Settings History report functions a little differently than the reports found on the dashboard as this report does not track any statistics, but actions taken by an administrative level account on the system. As such this report does not have a chart view and simply shows all the actions taken by administrators in the view on the right as shown below:

Account Type	Setting Name	Previous Value	New Value	Email	Date
Prospect	Number of days before messages are expired	18	25	admin21@datamotion.co m	6/7/2024, 3:06:44 AM
Admin	Forms Admin Permission	True	False	admin21@datamotion.co m	6/6/2024, 1:59:23 AM
Employee	Number of days before messages are expired	28	30	admin21@datamotion.co m	5/30/2024, 7:15:39 AM
TestAS	Account Type Deleted		Deleted	admin21@datamotion.co m	5/30/2024, 3:23:40 AM
TestAS	Account Type Deleted		Deleted	admin21@datamotion.co m	5/30/2024, 2:56:53 AM
TestAS	Account Type Created		TestAS	admin21@datamotion.co m	5/30/2024, 2:56:46 AM
TestAS	Account Type Created		TestAS	admin21@datamotion.co m	5/30/2024, 2:56:35 AM
TestAS	Number of days before messages are expired		88	admin21@datamotion.co m	5/30/2024, 2:56:27 AM

This report can be sorted (as well as downloaded as a .csv file) via a few simple steps which are described below:

NOTE: These steps assume you have already accessed the Reports view.

1. Input a date range in the Enter a data range field.
 - » This requires selecting the first date and then the second date in the date range calendar like this:



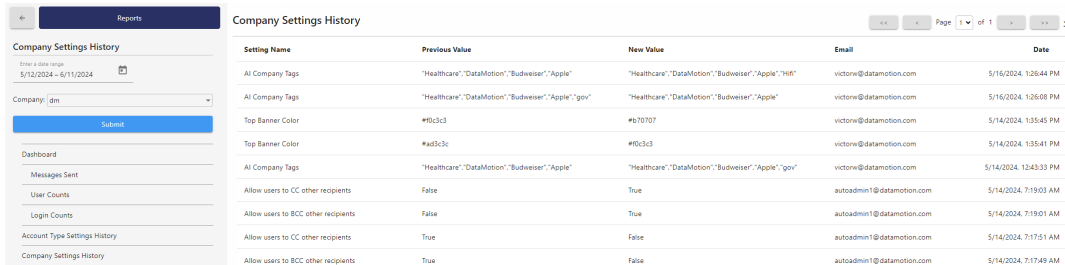
2. (If your company has sub-tenants) select a company from the Company drop-down.
3. Click the Submit button.
4. The view on the right side will change and can be further sorted via the page selector at the top right and by clicking any of the column headings.
5. (Optional) The report can now be downloaded by clicking the download icon.

Account Type Settings History



COMPANY SETTINGS HISTORY REPORT

The Company Settings History report functions similarly to the Account Type Settings History report except that it tracks settings changes at the company level instead of the Account Type level.

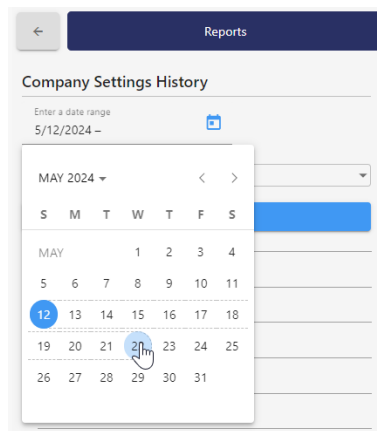


Setting Name	Previous Value	New Value	Email	Date
All Company Tags	"Healthcare","DataMotion","Budweiser","Apple"	"Healthcare","DataMotion","Budweiser","Apple","H&M"	victore@datamotion.com	5/16/2024, 1:26:44 PM
All Company Tags	"Healthcare","DataMotion","Budweiser","Apple","gov"	"Healthcare","DataMotion","Budweiser","Apple"	victore@datamotion.com	5/16/2024, 1:26:08 PM
Top Banner Color	#0d3c3	#b70707	victore@datamotion.com	5/14/2024, 1:35:45 PM
Top Banner Color	#a03c3c	#0d3c3	victore@datamotion.com	5/14/2024, 1:35:41 PM
All Company Tags	"Healthcare","DataMotion","Budweiser","Apple"	"Healthcare","DataMotion","Budweiser","Apple","gov"	victore@datamotion.com	5/14/2024, 12:43:33 PM
Allow users to CC other recipients	False	True	autoadmin1@datamotion.com	5/14/2024, 7:19:03 AM
Allow users to BCC other recipients	False	True	autoadmin1@datamotion.com	5/14/2024, 7:19:01 AM
Allow users to CC other recipients	True	False	autoadmin1@datamotion.com	5/14/2024, 7:17:51 AM
Allow users to BCC other recipients	True	False	autoadmin1@datamotion.com	5/14/2024, 7:17:49 AM

This report can be sorted (as well as downloaded as a .csv file) via a few simple steps which are described below:

NOTE: These steps assume you have already accessed the Reports view.

1. Input a date range in the Enter a data range field.
 - » This requires selecting the first date and then the second date in the date range calendar like this:



2. (If your company has sub-tenants) select a company from the Company drop-down.
3. Click the Submit button.
4. The view on the right side will change and can be further sorted via the page selector at the top right and by clicking any of the column headings.
5. (Optional) The report can now be downloaded by clicking the download icon.

Company Settings History

LOGIN REPORT

The login report provides a detailed report of user login activity including their email address, success/fail, their identity provider (if blank they are using the username/password login mechanism), and the date of the login attempt.

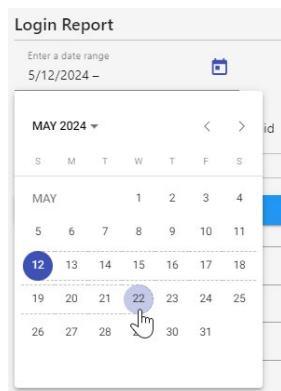
The screenshot shows the 'Login Report' interface. On the left is a sidebar with a 'Reports' header and a 'Login Report' section containing filters for date range (5/22/2024 - 6/21/2024), status (All, Success, Invalid), and company (dm). A 'Submit' button is at the bottom of the sidebar. The main area displays a table of login attempts with columns for Email, Status, Provider, and Date. The table shows 15 entries, all with a 'Success' status. The last entry is for 'user@datamotion.com' with provider 'microsoft' on 6/19/2024 at 2:13:05 PM.

Email	Status	Provider	Date
kmuser@dm.com	Success		6/21/2024, 6:55:34 PM
admin21@datamotion.com	Success		6/21/2024, 8:22:36 AM
autoadmin1@datamotion.com	Success		6/21/2024, 7:55:14 AM
user21@datamotion.com	Success		6/21/2024, 7:31:11 AM
admin21@datamotion.com	Success		6/21/2024, 7:10:28 AM
autoadmin1@datamotion.com	Success		6/21/2024, 2:23:20 AM
kmuser@dm.com	Success		6/20/2024, 2:03:22 PM
admin21@datamotion.com	Success		6/20/2024, 7:57:21 AM
admin21@datamotion.com	Success		6/20/2024, 6:50:52 AM
autoadmin1@datamotion.com	Success		6/20/2024, 6:31:04 AM
admin21@datamotion.com	Success		6/20/2024, 4:57:27 AM
autoadmin1@datamotion.com	Success		6/20/2024, 4:33:50 AM
user@datamotion.com	Success	microsoft	6/19/2024, 2:13:05 PM

This report can be sorted (as well as downloaded as a .csv file) via a few simple steps which are described below:

NOTE: These steps assume you have already accessed the Reports view.

1. Input a date range in the Enter a data range field.
 - » This requires selecting the first date and then the second date in the date range calendar like this:



2. (If your company has sub-tenants) select a company from the Company drop-down.
3. Click the Submit button.

4. The view on the right side will change and can be further sorted via the page selector at the top right and by clicking any of the column headings.
5. (Optional) The report can now be downloaded by clicking the download icon.

Login Report

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<
Page 1 of 3
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>>
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This concludes the *DataMotion Secure Platform Administration Guide*.