DataMotion Direct Administration Guide

September 30, 2014
Part # 050005–04

DataMotion Direct Administration Guide v4

Publication Date: September 30, 2014

Printed in the United States of America.

DataMotion, Inc. Confidential and Proprietary Information.

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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 4

Added to the *Reports* section in *Chapter 1) DataMotion Direct Company Administration,* the new *Group Mailbox Access Report* on page 41.

Version 3

Documented new features including company hierarchy administration, which supports administration of a company tree structure, allowing administrators to manage users for tenant companies.

Chapter 1) DataMotion Direct Company Administration

- *Moving Existing Users* (on page 33): Added this new section describing how administrators can move existing users to tenant companies and among tenant companies.
- *Who Sets up a Cobrand?* (on page 20): Updated this Cobranding section to highlight the ability for administrators to set up cobrands.

Version 2

Chapter 1) DataMotion Direct Company Administration

Added new information on Company Cobranding:

- *Company Cobranding* (on page 14).
- *Cobranding the Web Portal* (on page 19).

Added new description of the differences between Administrators who perform Company Administration and Super-Administrators who perform Multi-Company Administration:

- *DataMotion Direct Administration Levels* (on page 14).

Version 1

Initial version of this document. This document assembles content from previously published documents. Information in this document was previously published in the following documents:

- *DataMotion SecureMail Administration Guide* (last published August 27, 2012) has been incorporated into Chapter 1, "*DataMotion Direct Company Administration*."

- *SendSecure Button for Microsoft Outlook: Group Automatic Distribution via Group Policy Management* (last published October 27, 2011) has been incorporated into Chapter 2, "***DataMotion Direct Integration with Typical Environments***."
- *SecureMail for Lotus Notes Installation Guide* (last published October 27, 2011) has been incorporated into Chapter 2, "***DataMotion Direct Integration with Typical Environments***."
- *DataMotion eForms Overview* [AppNote] (last published December 15, 2011) has been incorporated into Chapter 3, "***SecureForms Standard***."
- *DataMotion eForms Cookbook* [AppNote] (last published August 21, 2012) has been incorporated into Chapter 3, "***SecureForms Standard***."

About This Publication

ABOUT DATAMOTION DIRECT

This publication describes how to manage DataMotion Direct.

DataMotion is a Health Information Service Provider (HISP), and DataMotion Direct is the HISP message transport service that the company provides. DataMotion Direct follows the national set of specifications and standards on Direct Exchange or Direct Messaging from the Direct Project (http://directproject.org/). The Direct Project specifies simple, secure, scalable, and standards-based methods for the exchange of authenticated and encrypted Protected Health Information (PHI) among trusted recipients over the Internet. This enables messages to be compliant with HIPAA and HITECH regulations, as well as conforming to Meaningful Use Stage 2 criteria issued by the Office of the National Coordinator for Health IT (ONC).

People who use DataMotion Direct include healthcare providers and care team members, patients, laboratories, hospitals, clinical systems, pharmacies, business associates, and health insurance providers. DataMotion Direct users can securely exchange a variety of sensitive data, including patient intake forms, electronic invoices, summary of care documents, large images, and other clinical healthcare data, as well as private or confidential messages and other communications. With integrated large file support, DataMotion Direct seamlessly delivers documents, images, and other large files, eliminating a significant bottleneck in healthcare data exchange.

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 DataMotion Direct. They are not expected to be security experts, but knowledge of security policies and email is helpful.

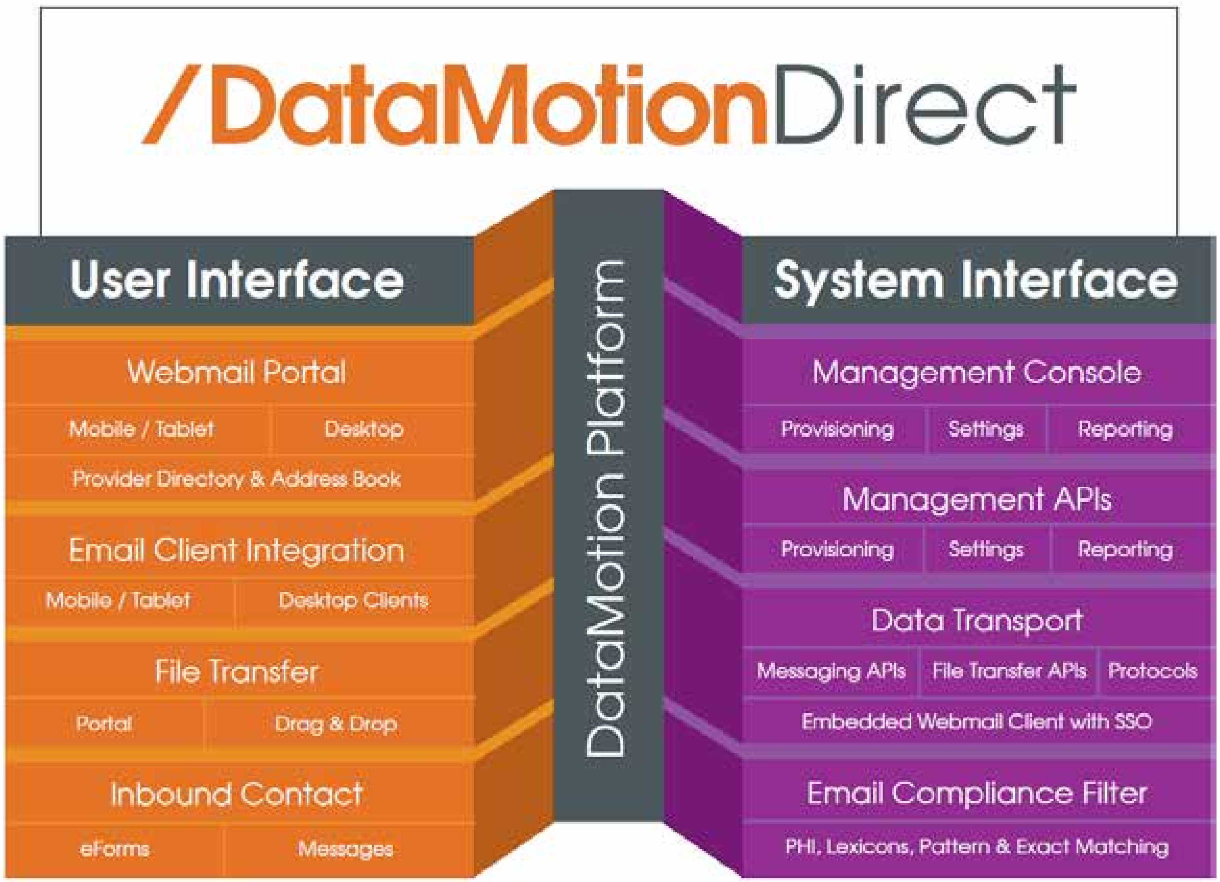
Additional technical documentation, as well as user documentation, is also available from DataMotion. See ***DataMotion Documentation*** (on page 11).

DATAMOTION DIRECT PLATFORM OVERVIEW

The following information describes the DataMotion Direct 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 Direct platform is not needed to use the product, this broader picture of DataMotion Direct may interest those who like to understand the larger context for what they are doing.

DataMotion offers a technology architecture in DataMotion Direct that is mature, robust, scalable and time-tested. The following DataMotion Direct Platform Block Diagram shows the DataMotion Direct User and System Interfaces (a description follows the diagram).

DataMotion Direct Platform Block Diagram



The left side of the diagram shows the DataMotion Direct User Interface. The User Interface has been designed for simplicity and ease so that end-users can accomplish the secure transport of messages and data in the quickest way possible. The User Interface components of the block diagram represent the principal aspects of the system as experienced by users. This includes:

- A Webmail Portal and Email Client Integration for sending and receiving secure messages
- SecureFileTransfer for sending files securely (including large files), and

- Inbound Contact for enabling secure incoming messages and data from any person.

The *DataMotion Direct Administration Guide* contains instructions on using the Webmail Portal, Email Clients, and SecureFileTransfer. The information on using Email Clients is divided into categories specifically describing how to use tablets, smartphones, and desktop clients such as Microsoft Outlook*.

Although not addressed in this manual, the right side of the diagram shows the **DataMotion Direct System Interface**. The System Interface has been designed for partners, developers, system integrators and administrators so that they can quickly and easily deliver Secure Messaging and Data Transfer to their clients and customers.

PRODUCT TERMINOLOGY

Because the various technology components shown in the ***DataMotion Direct Platform Block Diagram*** 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, DataMotion SecureMail Portal
Email Client Integration	SendSecure Button, Desktop Client Program, Email Client Add-In
Electronic Forms	eForms, SecureForms
Inbound Contact	SecureContact and SecureContactMe

HOW TO USE THIS PUBLICATION

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

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 Direct Company Administration
Describes how to manage your DataMotion Direct accounts, including how to use the Admin Console tools for report generation, cobrand creation, and user administration (e.g., adding, changing, or deleting users, setting user type privileges, managing passwords, and managing security questions).

Chapter 2) DataMotion Direct Integration with Typical Environments
Describes how to integrate DataMotion Direct in some typical environments, including step-by-step instructions for installing the SendSecure Button add-in, which allows users to send secure messages from within their normal email interface.

Chapter 3) SecureForms Standard
Describes how to create DataMotion SecureForms Standard, including PDF and HTML SecureForms, and how to access SecureForm data.

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- *DataMotion Direct Software Development Kit Technical Reference Manual for Visual Basic* (part # 050001)
  Documents the Application Programming Interfaces (APIs), and system development, maintenance, and administration tools for developers.
- *DataMotion Direct Software Development Kit Technical Reference Manual for Java (part #* 050015)
  Documents the technical specifications and uses of the SDK in a working environment, and also outlines code samples.
- *DataMotion Direct User Guide* (part # 050003)
  Provides instructions for using the products.

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

1
DataMotion Direct Company Administration

DATAMOTION DIRECT FEATURE OVERVIEW

DataMotion Direct provides secure message delivery with integrated tracking. Designed to easily fit into existing work flows, DataMotion Direct 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 DIRECT FEATURES

DataMotion Direct is a highly flexible platform which can provide a variety of secure transport services for your organization. Using DataMotion Direct, your organization can securely send messages, files and forms as well as have outside organizations or even customers securely contact you.

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

- Secure message delivery
- SecureContact.me to allow anyone to send inbound secure messages to your users
- No software is required by the recipient
- Web Portal for sending, receiving and tracking messages
- Customization of the Web Portal with company cobranding for a branded user experience
- Multiple delivery methods for secure messages including web notifications and encrypted PDF attachments
- 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

- Consolidated-Clinical Document Architecture (C-CDA) Document Viewer with print feature
- Address book with Health Provider Directory (HPD) search capability

DATAMOTION DIRECT MESSAGE FLOW

The basic flow of messages through DataMotion Direct does not differ much from the flow of messages without DataMotion Direct. Messages can be sent to the system through a variety of interfaces depending on your needs and use, and can also be delivered through multiple mechanisms.

In general, the message flow when using DataMotion Direct is as follows:

1. The message is sent to the DataMotion Direct service.
2. The message is processed and the recipient list is determined. For recipients that do not already have DataMotion Direct accounts, a “recipient” account is created for the user.
3. The message is placed in the Inbox for each recipient.
4. The recipients are sent notifications that a new message has been securely delivered to them.
5. The recipients follow the embedded link in the notification message to access the Web Portal to read the message. First time recipients are enrolled when they come to the portal for the first time.
6. Tracking information is recorded for the sender when the message is delivered and read.
7. The sender is sent a receipt that the message has been read.

SECURECONTACT.ME

SecureContact.me is a feature where someone can send you a new secure message, not just a reply to one you have sent. This feature is available for all your users and provides a simple method for someone to securely send new inbound messages that are not replies to previous ones.

SecureContact.me works by providing each user with a simple, unique URL in the form:

```
https://securecontact.me/zmoore@galacticseats.com
```

This URL can be placed into a message signature, on a business card or a profile page. When someone clicks on the link they will be taken to a page where they can send a new secure message directly to the specified message address, but to no one else.

Each user will have a SecureContact.me link under their **My Account** heading in the Member Center. When they click on this link it will generate the specific URL for that user and provide them with information about how to copy and use the link.

COMPANY COBRANDING

Company Cobranding is a feature of DataMotion Direct that allows an organization/company to place its brand identity on the DataMotion secure messaging portal. The simplest cobranding can include a company logo (with a hyperlink on the image), a custom color, and other options. You can also use HTML coding in place of the image for advanced cobranding customization.

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

See *Cobranding the Web Portal* (on page 19) for detailed information.

DATAMOTION DIRECT COMPANY ADMINISTRATION OVERVIEW

DataMotion Direct **Company Administration** allows you to manage the DataMotion Direct accounts for your company or organization.

For the difference between Company Administration and Multi-Company Administration, see *DataMotion Direct Administration Levels* (below).

EXAMPLE COMPANY

Throughout this publication, a fictitious, example company called Galactic Seats is used to illustrate how to perform administration, including cobrand creation, user administration, and report generation.

DATAMOTION DIRECT ADMINISTRATION LEVELS

There are two levels of DataMotion Direct administration used by different types of customers. Although the majority of customers perform Company Administration, some larger customers have contracted with DataMotion to oversee the administration of multiple companies. This higher level of administration is referred to as Multi-Company Administration.

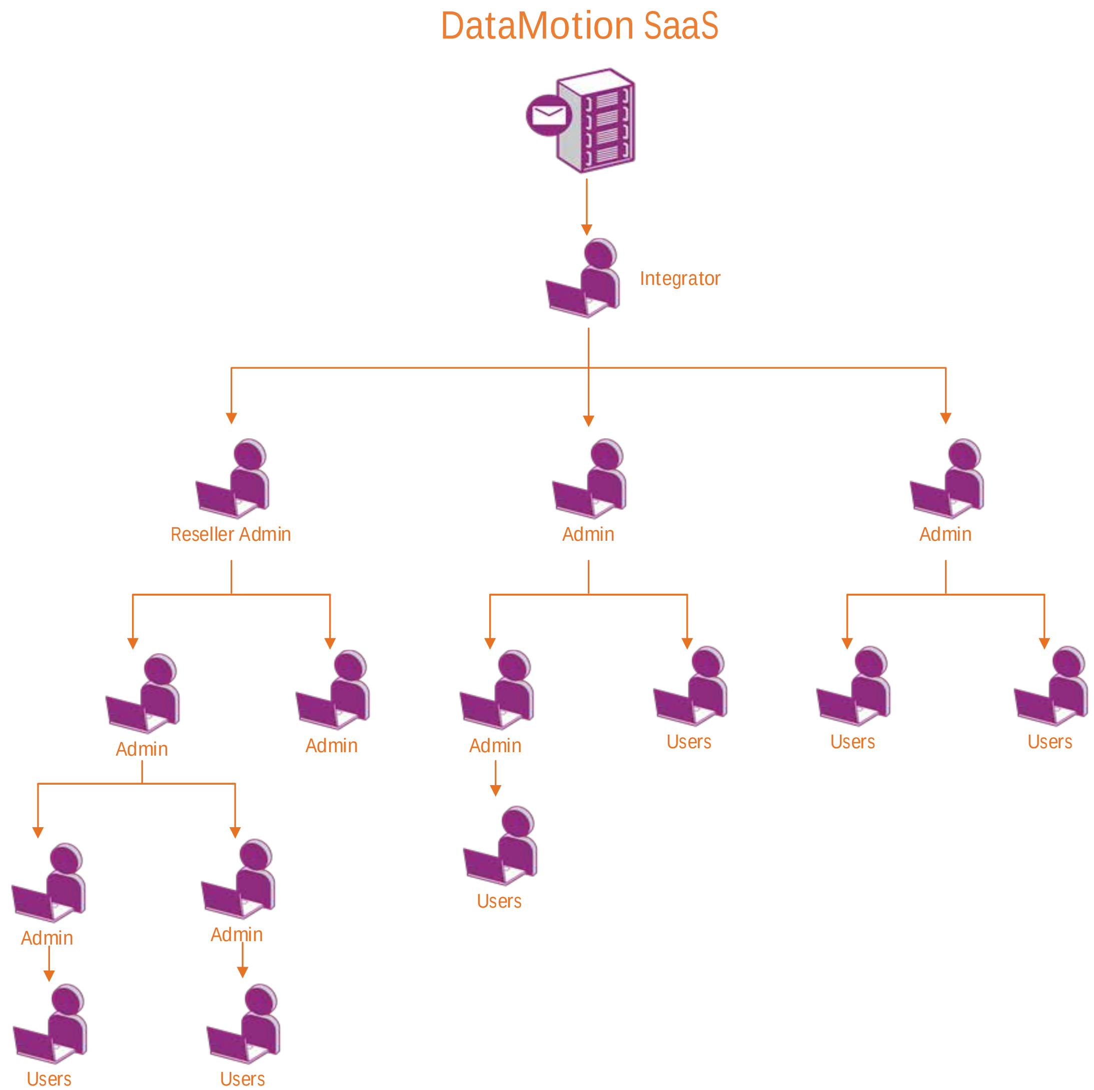
Company Administration refers to the management of DataMotion Direct for a single company. It provides company ***Administrators*** with tools for user administration, cobrand creation, and report generation. The company may be an autonomous business entity, or it may represent a division, branch, department, business unit, subsidiary, affiliate, etc., that is associated with a larger organization. The information in this chapter primarily describes Company Administration.

Multi-Company Administration refers to the management of DataMotion Direct for multiple companies or organizations. It requires a higher level of authority to perform Multi-Company Administration. Typically, Multi-Company Administration can be performed by a DataMotion partner or a larger corporation under special agreement with DataMotion. This central "landlord" company manages the DataMotion Direct accounts for the "tenant" companies or organizations it serves. In DataMotion Direct administration, the landlord company is also known as the Default Company.

The Default Company is actually the top-level company on the DataMotion Direct server under which all other companies or organizations are created. The administrator of the default company manages the settings for the company and also has the ability to create and maintain subordinate companies, among other things. It's also important to note that a company can only have one parent company, while the parent company can have multiple child companies.

The information in this chapter documents the administrative tools used by DataMotion Direct administrators for Company Administration.

Administrators can manage users within their own company, and if a company hierarchy exists, they can also manage users for tenant companies, including moving existing users to tenant companies and among tenant companies. For more information, see the following diagram and *Moving Existing Users* (on page 33).



USER TYPES AND PRIVILEGES

DataMotion Direct Company Administration is primarily focused on user administration. Your company account will feature several user types with unique privileges based on the services you have purchased.

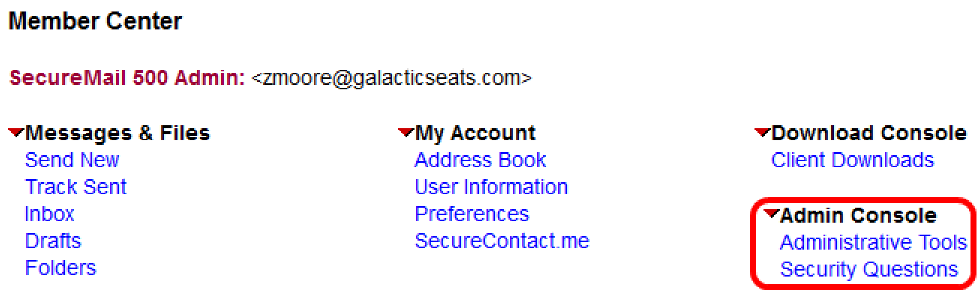
The **User Type** is how privileges, permissions, capabilities, and configurations are assigned. Based on the set of services your organization has purchased, DataMotion will provision several User Types into your company account. Each User Type is identified by a descriptive name.

When you assign users to a specific User Type, they will receive the privileges and configurations established by DataMotion for that User Type. A user can only be assigned to a single User Type, but DataMotion can work with you to make adjustments to your User Types if your users need different capabilities than what has been provided. (If the DataMotion Direct account for your company is managed by a corporate parent or a DataMotion partner, their admins will also be able to manage your User Types.)

There is always one User Type with administrative capabilities. Typically, it is named “Admin” or has a name that ends in “Admin.” Only users assigned to an Admin User Type will be able to access the Administration Tools described in this publication. Admin users have the ability to manage users and use the cobranding and reporting tools.

ADMINISTRATIVE TOOLS

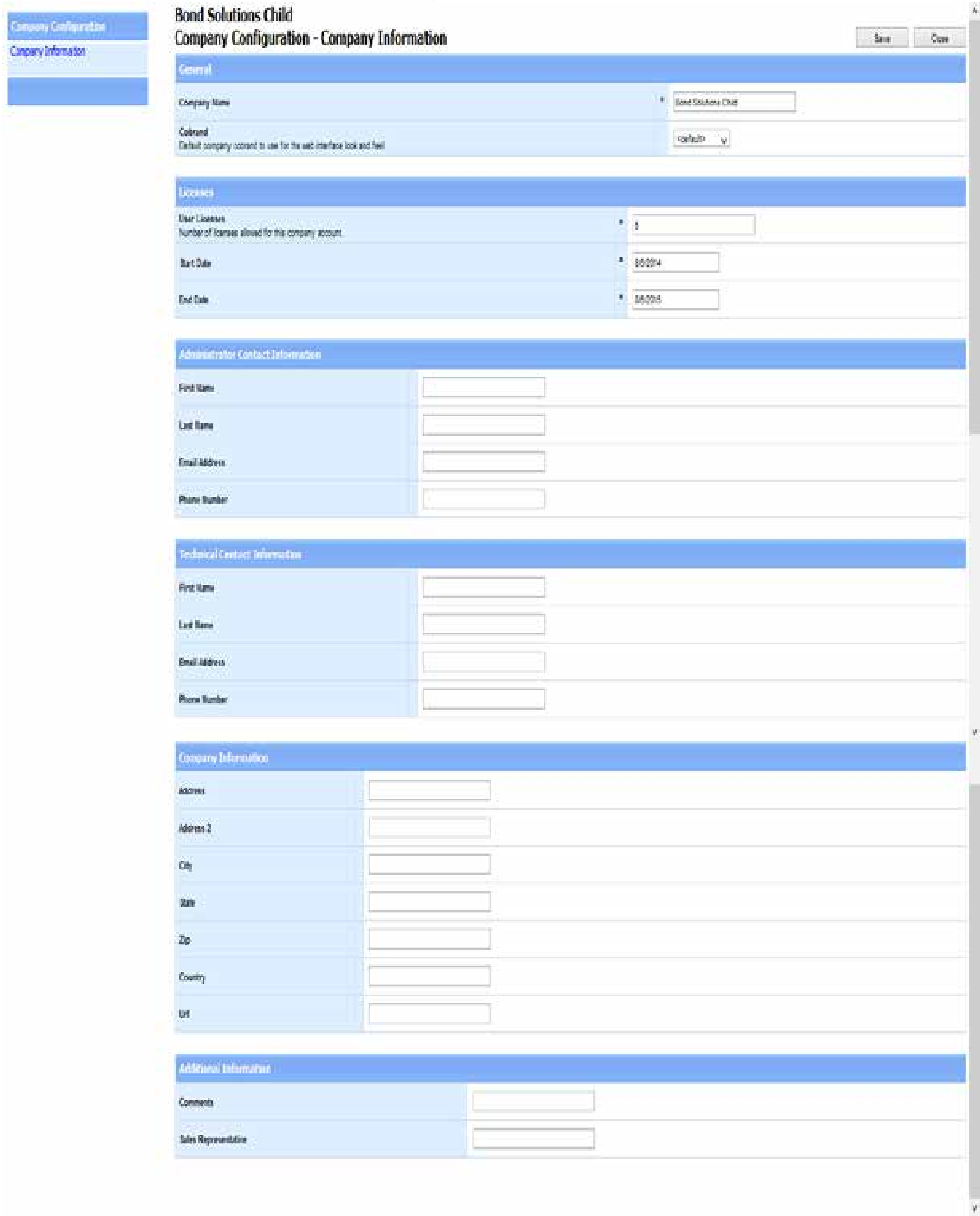
The administration of your company account is performed through the links shown in the Admin Console area of the Member Center. Only users who login with Admin privileges will see the Admin Console.



The Administrative Tools will always be available for the Admin. The Security Questions will only be available if this has been turned on for your company.

COMPANY CONFIGURATION

An Admin of any company that has a local installation will be able to view and modify various sections of a company's information within the Administrative Tools. On the Company Information page a screen detailing this data, will be broken down into sections based upon what can be viewed. The information of subtenants beneath the admins company can also be seen in the same fashion.



These settings are all of the settings that can be enabled by an integrator for an admin to view and edit within the company. If your company information page differs from the one above, the company's integrator has not enabled them for viewing.

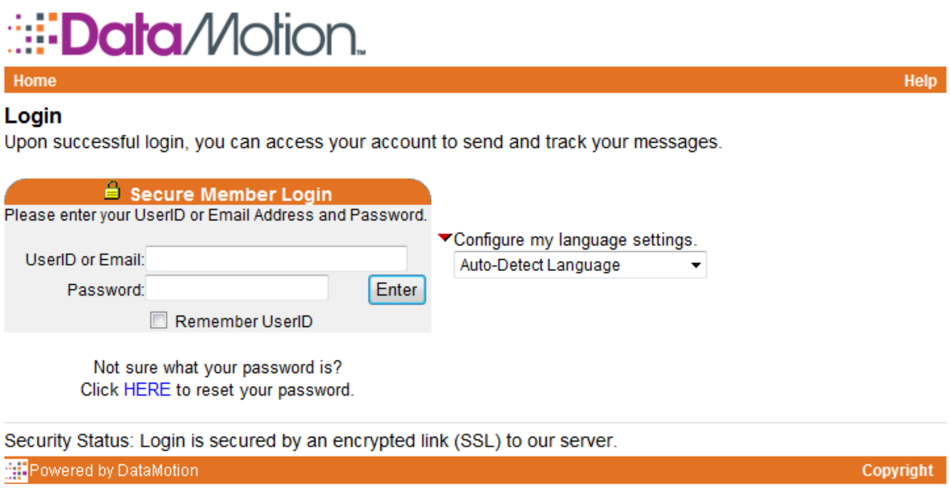
COBRANDING THE WEB PORTAL

WHAT IS COMPANY COBRANDING?

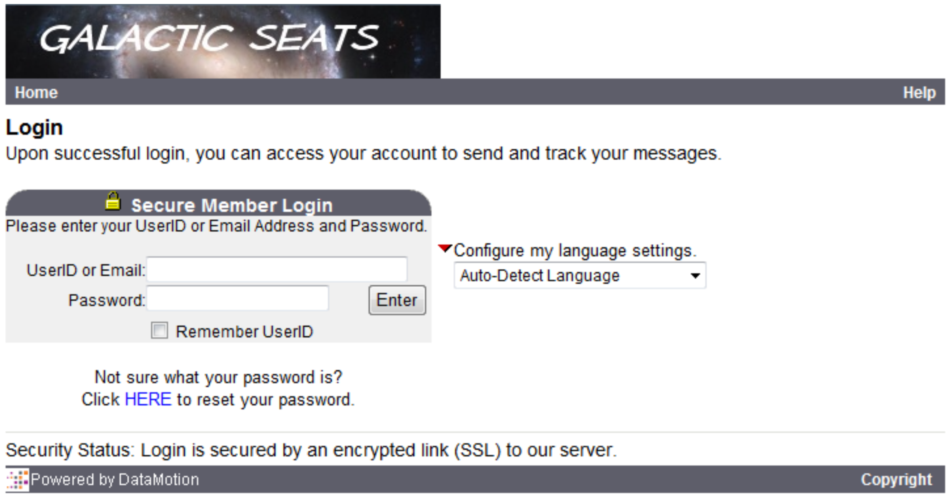
Company Cobranding allows a company or organization to place its brand identity on the DataMotion secure messaging portal. With cobranding, the message delivery notification sent to DataMotion Direct recipients contains a link with a cobrand tag. When DataMotion Direct **recipients** use this link to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

The following login screens illustrate a few of the differences between a standard DataMotion web portal and a cobranded portal.

Example of DataMotion Branded Web Portal Login



Example of a Co-Branded Web Portal Login



WHO SETS UP A COBRAND?

Administrators have permission to create cobrands for their companies. In addition, within a company hierarchy, an administrator of the parent company can cobrand any of its subtenants. It is also possible for an administrator of a subtenant to cobrand other subtenants beneath itself within this new hierarchy. If no cobrand exists for a company, it will use the default branding, which will be either the standard DataMotion branding or the standard cobrand inherited from a corporate parent, or landlord company, that is established as the default company.

COBRANDING FEATURES

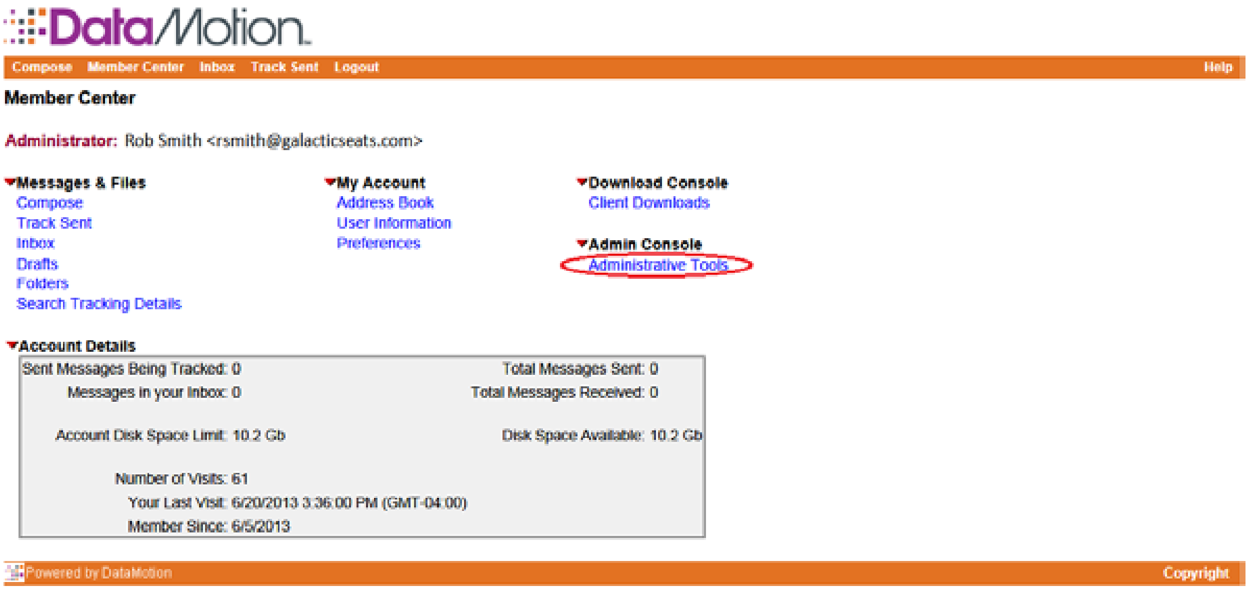
Cobranding features include the following:

- You can specify an **Image** (usually an organization or company logo) that will be displayed at the top of all portal pages.
- You can specify a **Hyperlink** that will be used if users click on the image.
- You can specify a **Custom Color** that will be used for common style elements on web pages, such as the login panel on the login screen, and the top menu bar and bottom status bar common to the portal pages.
- You can insert **HTML Coding** to be used in place of the image and accomplish advanced cobranding customization. The HTML can contain text, links, graphics, and columns and follow an HTML style sheet.
- You can control how long to **Allow users to stay signed in** (days, hours, minutes) without activity.
- You can specify whether to **Filter Messages**, which allows you to limit the messages that users see in their mailbox to the messages related to the cobranded company. It is primarily used to add another level of cobranding to the **recipient** experience. With cobranded message filtering, the DataMotion Direct recipient's mailbox will display only those messages from or to the cobranded company as long as the recipient accesses the portal using the notification message link.

CREATING A COMPANY COBRAND

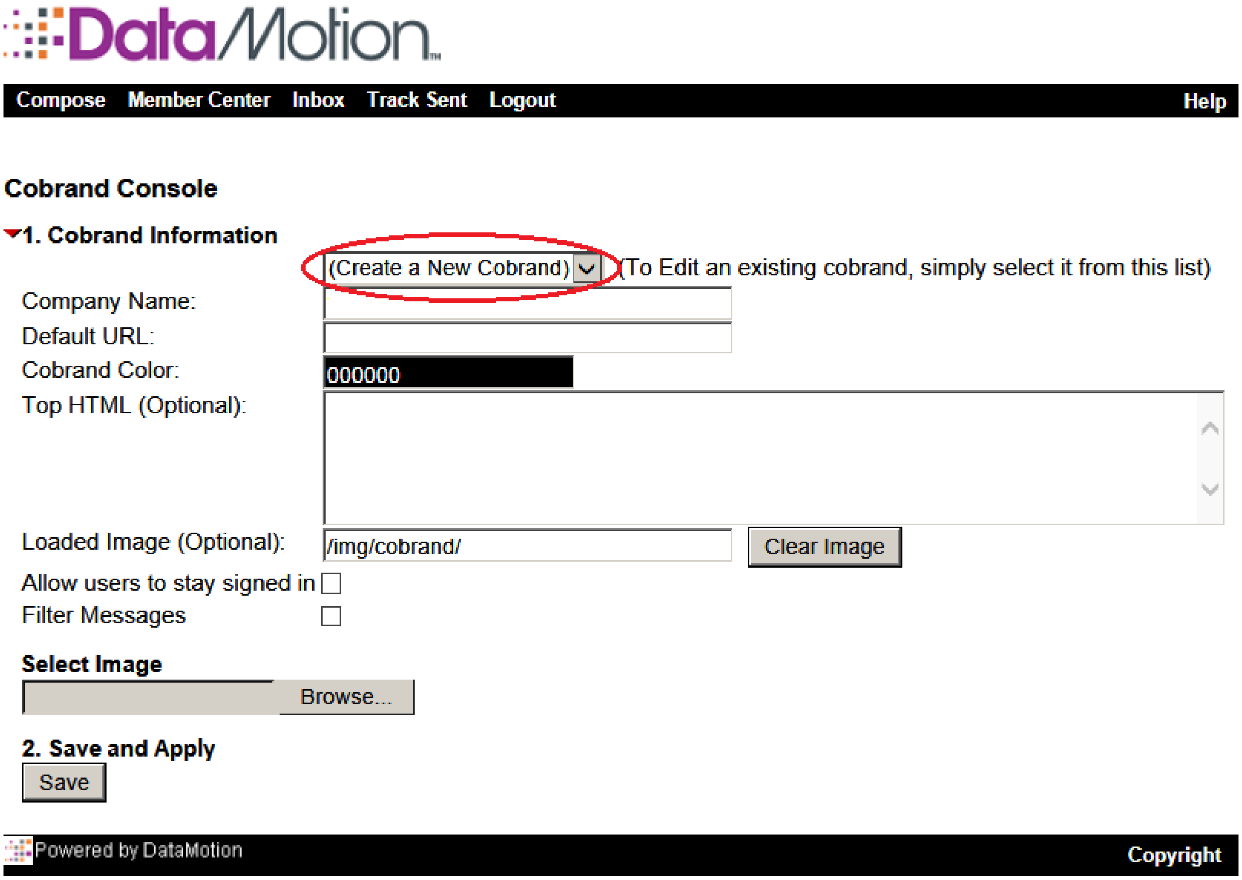
1. Log in to your DataMotion Direct portal as an Administrator. (The URL for the portal was determined during installation.) The Member Center page should be displayed, similar to the following. (If it is not, click Member Center on the menu bar at the top of the page.)

   NOTE: Some of the items on the following screens may be different or may not be shown on your screen depending upon your administrative rights.



2. On the Member Center page, click **Administrative Tools**. The Administration Console is displayed, similar to the following.

3. Under the Company Settings heading (or Server Settings heading), click **Cobrand Management Console**. The Cobrand Console is displayed, similar to the following.



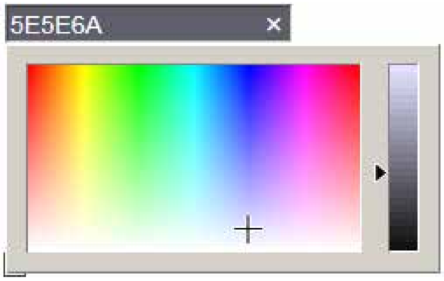
4. In the first field (which is a drop down list), select **(Create a New Cobrand)**.
5. Fill in the applicable cobrand fields according to the information that follows:

    » **Company Name** (optional) is a descriptive name that will be associated with the cobrand. This name will be displayed in the Edit cobrand drop down list.

    » **Default URL** (optional) is the URL where users are directed when they click on the cobrand image. You must include the protocol/scheme (e.g., “http://”) in the URL. If not specified, the URL will be the host server, e.g., http://www.datamotion.com.

    » **Cobrand Color** (optional) defines the web color used for common style elements on the web portal pages, namely, in the login panel on the login page, as well as the top and bottom ribbon bars (menu and status bars) common to the portal pages. It is a 6-character hexadecimal identifier. The six-digit identifier is actually a hex triplet, or three-byte hexadecimal number, used to represent colors in HTML, CSS, SVG, and other computing applications. The bytes represent the Red, Green and Blue (RGB) components of 24-bit “True Color,” ranging from 00 for least intensity to FF for greatest intensity. (000000 is black or no color, and FFFFFF is white or all colors.) This offers 16,777,216 different color possibilities. (Optional: You may precede the color code with an # sign, which is common with hex color codes.)

    You may enter a color code using the keyboard or you may use the built-in color picker tool. (The color picker tool will pop up when you click in the Cobrand Color field.) To use the color picker:



A) Point to the Color Selector box (the RGB "spectrum") that is displayed, and using the cross-hair cursor, click on a spot to select a hue.

B) To the right of the Color Selector box is a Shade Selector that allows you to select a lighter or darker shade. Click and drag the slider triangle up or down to select a shade, or click on a spot within the Shade Selector bar.

Most imaging software will also allow you to view and select hex color codes. The ColorPix tool http://www.colorschemer.com/colorpix_info.php can be particularly helpful when trying to match the color in an existing image or logo. You may also use their on-line color tool to find a color.

NOTE: If you specify the color as #FFFFFF (white), it will result in ribbon bars that cannot normally be seen (including the menu bar), because they will have white text on a white ribbon bar against a white background.

» **Top HTML** (optional) allows you to accomplish advanced cobranding customization by specifying a block of HTML coding to be used in place of the cobrand image in the page header. The HTML can contain text, links, graphics, and columns and follow an HTML style sheet.

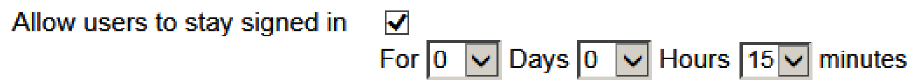
(The page header is probably the most important element in the cobranding design, and either the **Top HTML** method or the **Select Image** method should be used to cobrand the page header. A selected cobrand image takes precedence over Top HTML if any HTML code is inserted in Top HTML. To give the HTML precedence when an image is also loaded, you must use the **Clear Image** button. If you want to use a loaded image in Top HTML, you would first upload an image through Select Image plus Save, and then copy the path of the Loaded Image into the Top HTML, as well as any safe location on your computer, plus Save; then you can use Clear Image to give the Top HTML precedence.)

NOTE: If the Top HTML field contains some boilerplate code, do not delete it unless you intend to replace it with customized HTML.

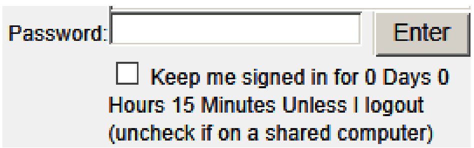
» **Loaded Image** (non-editable field) displays the database server path and internal filename for the uploaded cobrand image that was Selected and Saved.

» **Clear Image** button immediately removes the image from the cobrand. This action goes into immediate effect (a “Save” is not required to apply this action). It is important to wait for the action to complete and then click the Quick View button to see the result. Clear Image is only used to remove an existing cobrand image and give Top HTML precedence. It is not necessary to use Clear Image to replace a cobrand image (in this case, simply select another image). Clear Image does not remove the image from the database, so it can be referenced in the Top HTML, as long as you stored a copy of the Loaded Image path and file name so you can reference it.

» **Allow users to stay signed in** (optional) allows you to enable those users who login through the cobranded portal the opportunity to stay signed in for the time period that you specify here. You can specify how long in days, hours, and minutes these users can be signed in without activity. When you click the check-box to put a checkmark in it, the controls for selecting **Days**, **Hours**, and **Minutes** will appear.



When users log in through the cobranded portal, it will offer them the option to select the login time that you have specified:

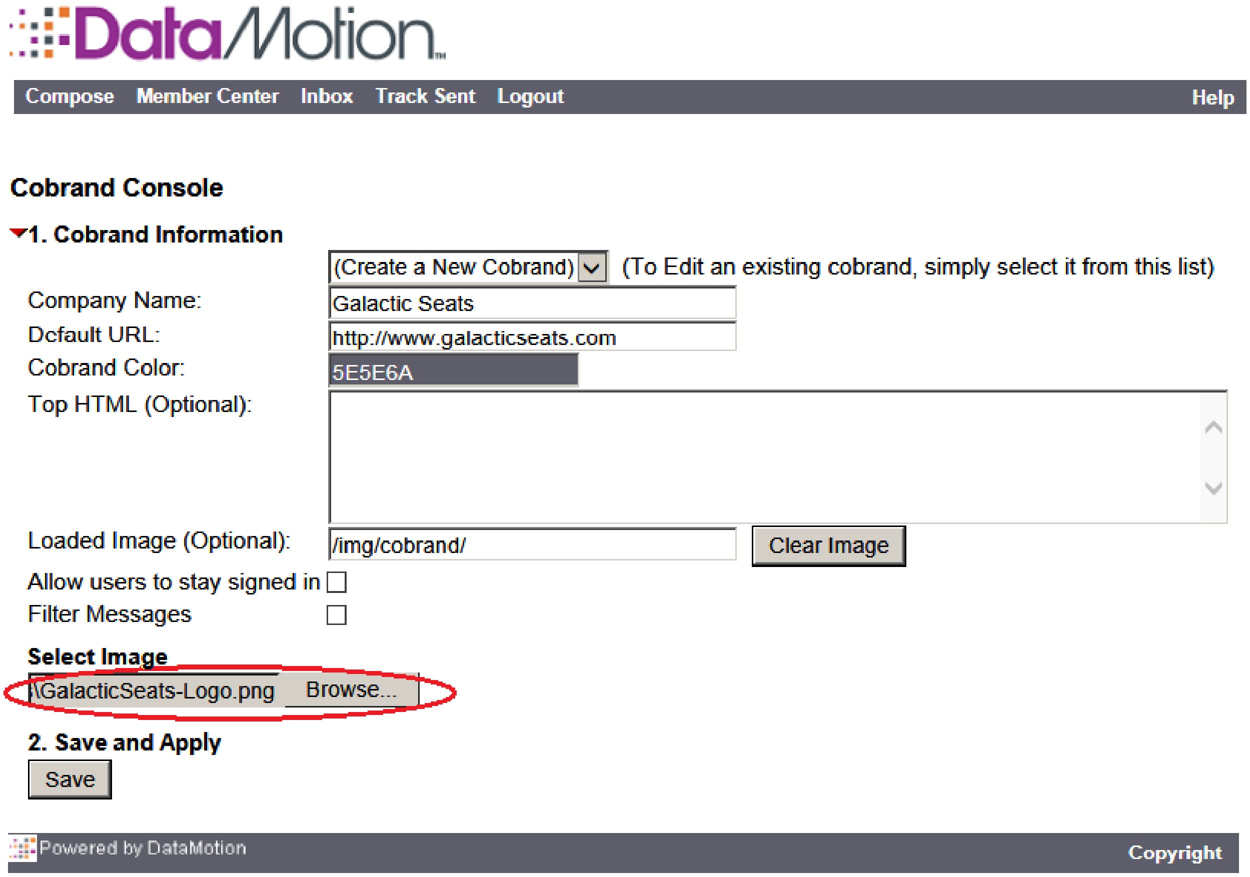


» **Filter Messages** (optional) allows you to limit the messages that users see in their mailbox to those messages related to the cobranded company. It is primarily used to add another level of cobranding to the **recipient** experience. With cobranded message filtering, the DataMotion Direct recipient’s mailbox will display only those messages from or to the cobranded company as long as the recipient accesses the portal using the notification email link.

Note that the recipient cobrand experience will take priority over the sender cobrand experience in those infrequent cases where this may occur. For example, if a DataMotion Direct sender (“Joe”) from one cobranded company is also a recipient of a DataMotion Direct message from second cobranded company, and Joe accesses the portal by clicking on the link in the notification message, the portal will be controlled by the second company’s cobranding, including any Filter Messages setting.

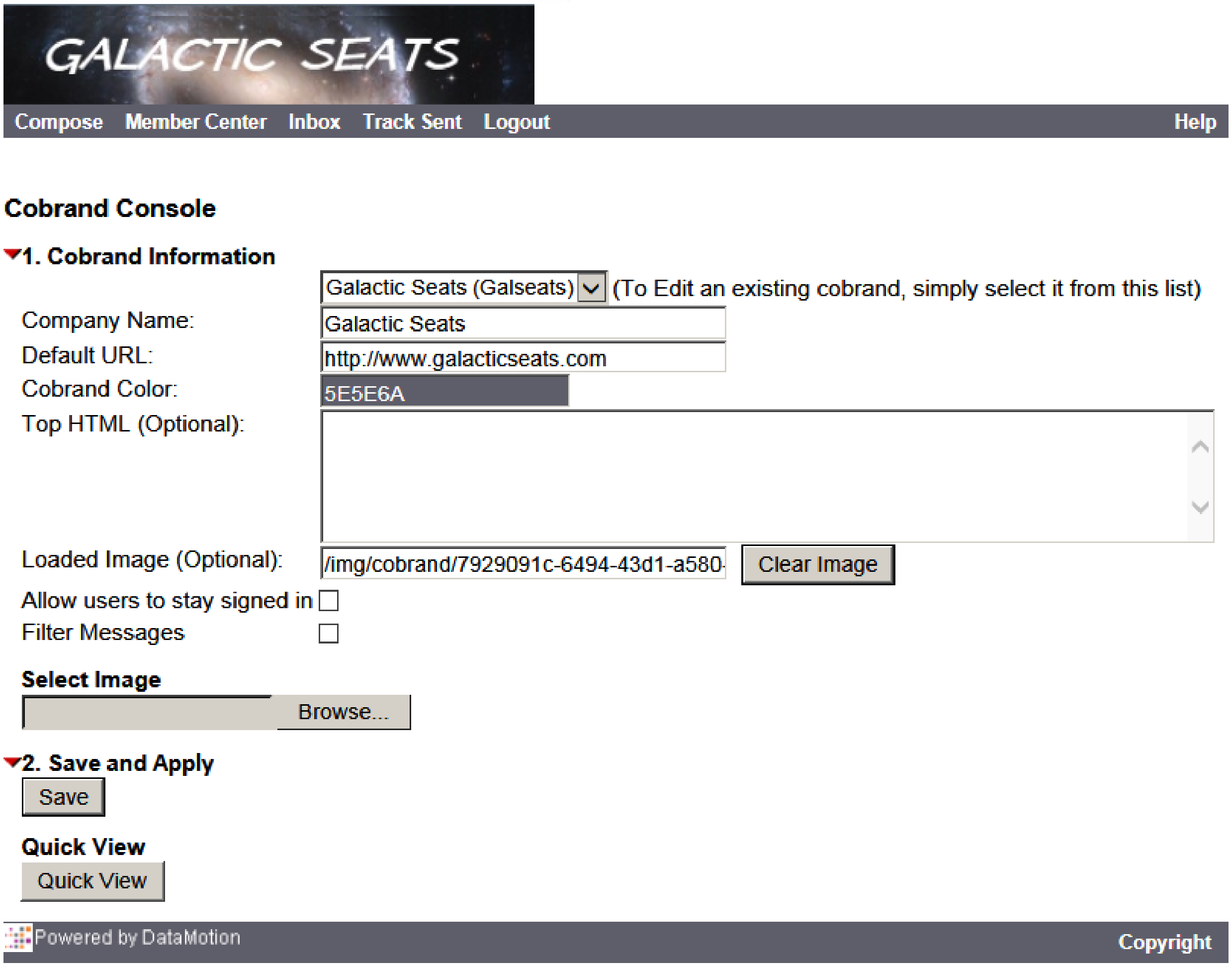
» **Select Image** (optional) allows you to select a ***cobrand image*** (usually an organization or company logo) that will be displayed at the top of all portal pages. This provides an easy way to create professional branding without requiring the use of HTML. Click the **Browse** button to find and select the image that you want assigned to the cobrand. Image formats supported include GIF, JPG, BMP and PNG. For the best viewing experience, your images should have 700 x 110 pixel resolution. Images with widths less than 250 pixels will be aligned to the left of the navigation bar. (The page header is probably the most important element in the cobranding design, and either the Top HTML method or the Select Image method should be used to cobrand the page header. A selected cobrand image takes precedence over Top HTML if any HTML code is inserted in Top HTML. To give the HTML precedence when an image is also loaded, you must use the Clear Image button.)

The following example shows the Galactic Seats cobrand with an image (company logo) selected but not yet saved.



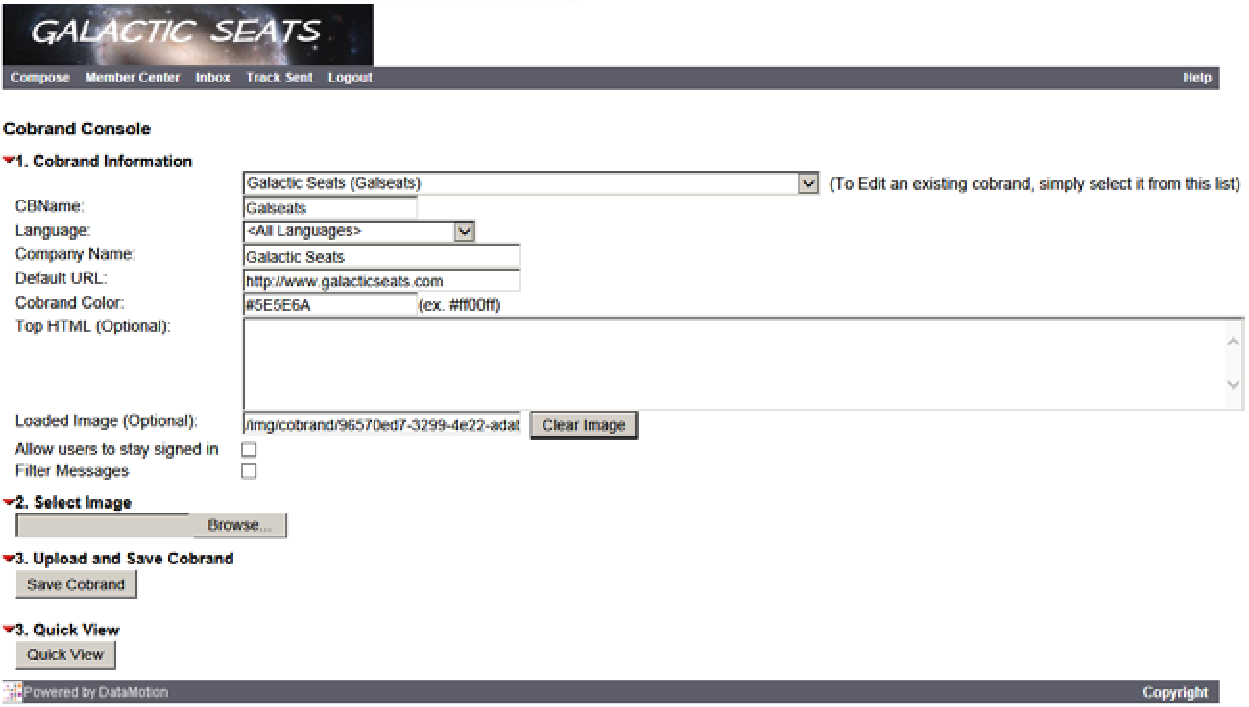
6. Click the Save Cobrand button to save your changes and apply the cobrand to the company. (This also applies the cobrand to the browser/portal session until you override it with a Quick View, another Save, or until you leave the website.)

   The following example shows the Galactic Seats cobrand saved and applied.



The creation of your cobrand is complete.

7. To verify the cobrand information was saved, **select** the cobrand in the Edit drop-down list (which is alphabetized by Company Name with the Cobrand Name following in parentheses), and **wait** a little bit until the cobrand fields are populated on the screen.



- When you **select** a cobrand, it immediately displays the color scheme on the cobrand page.
- Once the cobrand information appears, you may edit it if desired, or click **Quick View** to display the selected cobrand, including the image or Top HTML in the page header. (The Quick View button is used to apply the selected cobrand to the browser/portal session until another Quick View or Save overrides it or until you leave the website.)
- After you have made any changes to the cobrand, click **Save** to Save/Apply the cobrand.
- If you want to view the <Default> company cobrand, select the <Default> company from the drop-down list, and then click **Quick View**. If you want to return to using the <Default> company cobrand for this company (i.e., set the company to use the default cobrand), select the <Default> company from the drop-down list, and then click **Save**.

8. To get out of the cobrand display mode, log out, close the browser window, and then open a new window to log back onto the portal.

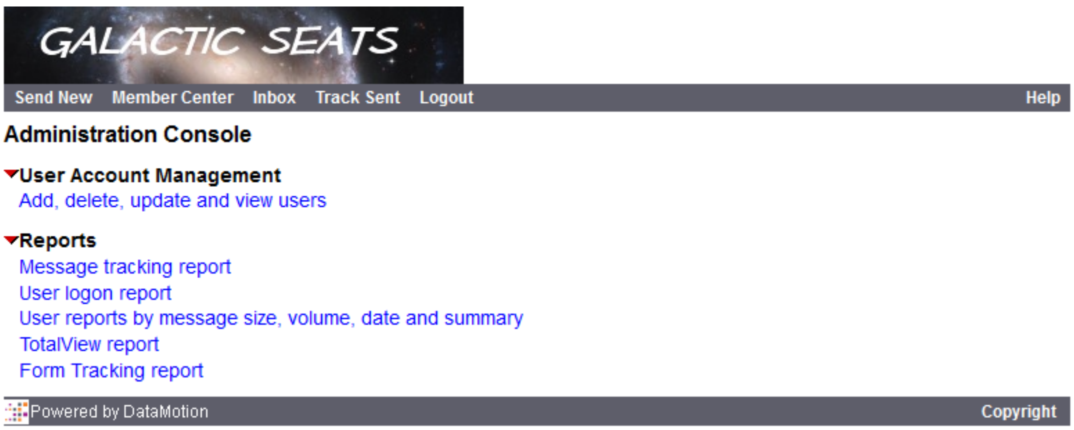
This concludes the information on Cobranding.

USER MANAGEMENT

To provide users with access to DataMotion Direct, you need to create accounts and have them assigned to the proper User Type. Once users have been created, they will be allowed to login and begin sending secure messages.

ACCESSING USER ACCOUNT MANAGEMENT

To manage your user accounts you need to login and access the Administrative Tools.

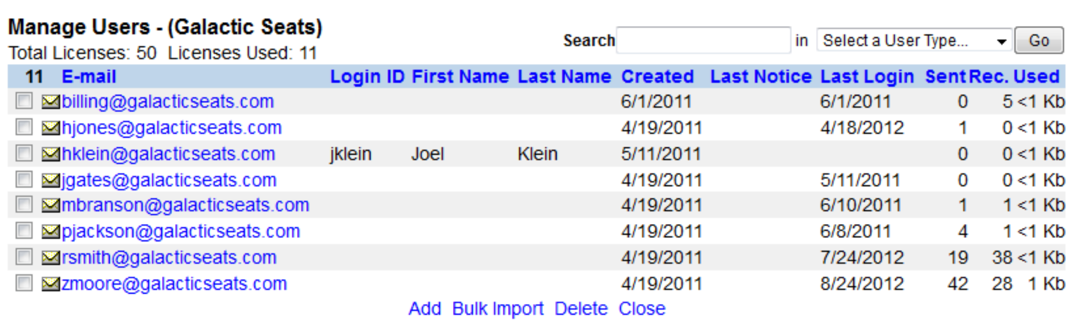


Click the Add, delete, update and view users link.

MANAGE USERS PAGE

When you first open the Manage Users view you may only see your own account listed. As you add more users you will be shown a full list here when this is opened.

This page is where you will perform all the user administration for your organization.



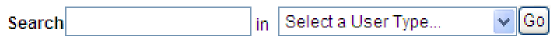
11 E-mail	Login ID	First Name	Last Name	Created	Last Notice	Last Login	Sent	Rec.	Used
billing@galacticseats.com				6/1/2011		6/1/2011	0	5	<1 Kb
hjones@galacticseats.com				4/19/2011		4/18/2012	1	0	<1 Kb
hklein@galacticseats.com	jklein	Joel	Klein	5/11/2011			0	0	<1 Kb
jgates@galacticseats.com				4/19/2011		5/11/2011	0	0	<1 Kb
mbranson@galacticseats.com				4/19/2011		6/10/2011	1	1	<1 Kb
pjackson@galacticseats.com				4/19/2011		6/8/2011	4	1	<1 Kb
rsmith@galacticseats.com				4/19/2011		7/24/2012	19	38	<1 Kb
zmoore@galacticseats.com				4/19/2011		8/24/2012	42	28	1 Kb

This page will provide a snapshot of your company user accounts, including the number of licenses you have and the number currently in use.

The Close link at the bottom will return to the Administrative Tools page.

Finding your Users

As the number of users grows, you can quickly search for specific accounts using the Search window. In the new hierarchy it is now possible for the parent company admins to see not only users within their company, but every user in its subtenants as well. This can be accomplished by selecting any of the parent's subtenants and searching for users. The results can be further filtered by selecting a User Type from the dropdown.



When searching it is possible to use wildcards to find multiple matches. The % symbol is used for the wildcard. For example, searching for "r%" would return rsmith@galacticseats.com in the picture above.

Additionally you can sort on any column by clicking on the column header. Clicking will alternate between ascending and descending order on that column.

Viewing/Editing User Accounts

To see the details of any existing account, click on the message address for that user. This will open the Update User page. From this page all the fields of an account can be edited.

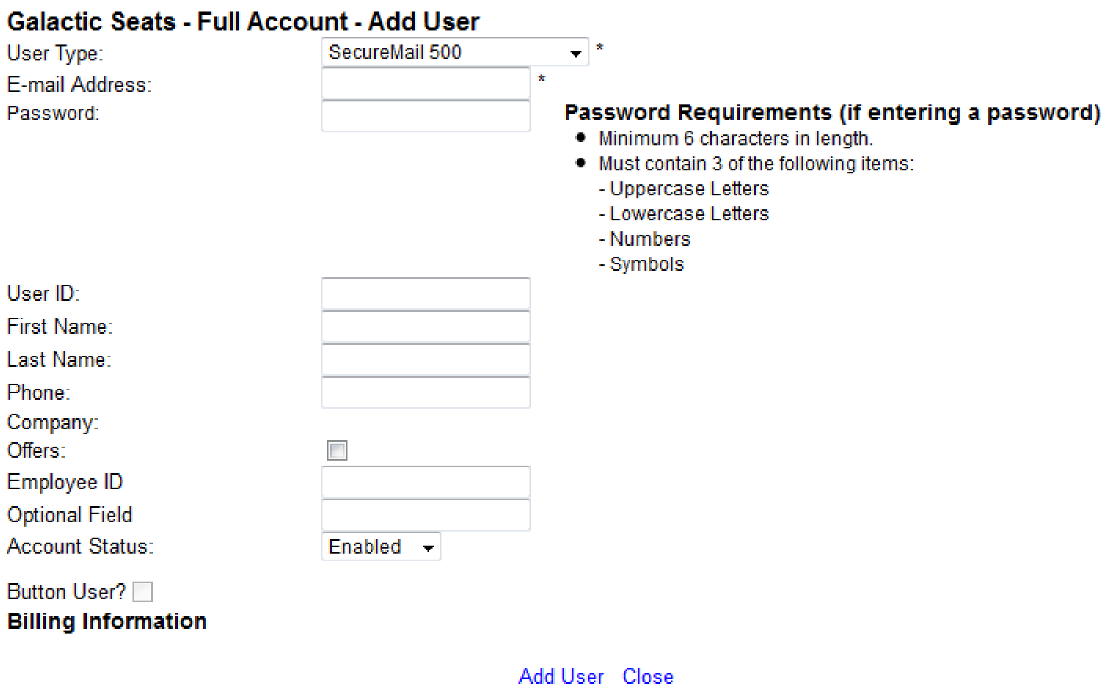
Click **Update User** to save the changes to the account. See ***Adding New Users*** (below) for information about the account properties.

Adding New Users

It will likely be necessary to add new users to your company account. To create a new user account:

1. From the Manage Users page, click the **Add** link at the bottom.

2. The Add User screen, similar to the following, is displayed:



3. Fill in the account information according to the information in the table that follows.

   The following table describes the properties associated with each user account. Only the user type and message address are required when creating the account; all other fields are optional.

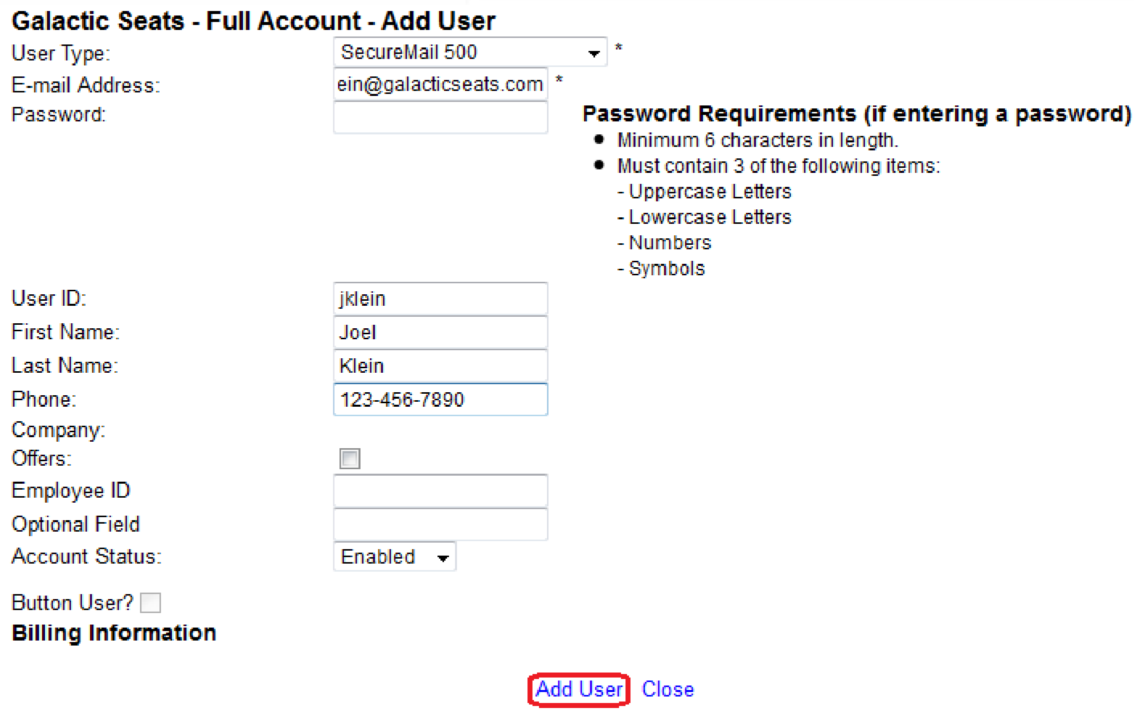
   NOTE: When you choose a new User Type, wait for the page to refresh before starting to enter the properties.

User Account Properties

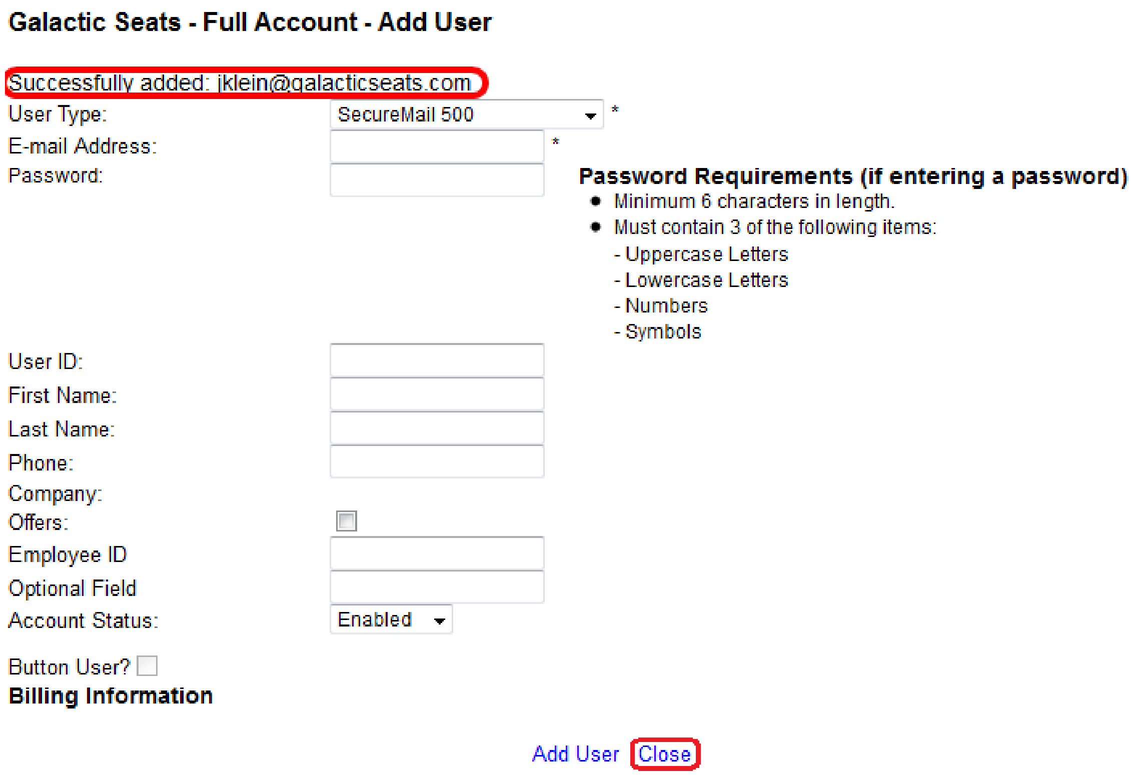
Account Property	Description
User Type	Determines the privileges assigned to the user. DataMotion Technical Support can provide guidance about the privileges associated with each User Type.
Message Address	The message address for the user.
Password	Assigns an initial password for the account. If a password is not entered here, the user will be sent a message to create a new password for their account.

Account Property	Description
User ID	Assigns a user ID to be used for the login instead of the user's message address.
First Name	User's first name.
Last Name	User's last name.
Phone	A contact phone number.
Company	This is blank when adding a user. When updating a user, it is auto-filled with the company account name.
Offers	This field is not currently in use.
Employee ID	If your company assigns identification numbers, it could be entered here.
Optional Field	Free-form field for any other information.
Account Status	Whether the account is enabled or disabled.
Button User	This is auto-filled by the system.

The following example shows the Add User screen with information entered for adding a Galactic Seats user.



4. Click Add User link to create the user account, and a screen similar to the following is displayed:



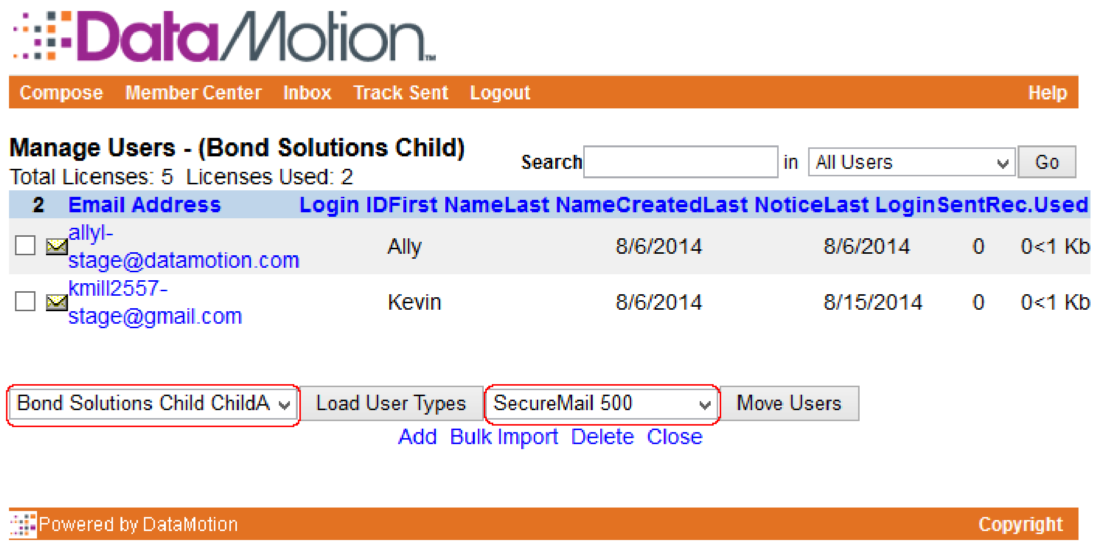
5. Click Close to return to the Manage Users page.

The user account is now created.

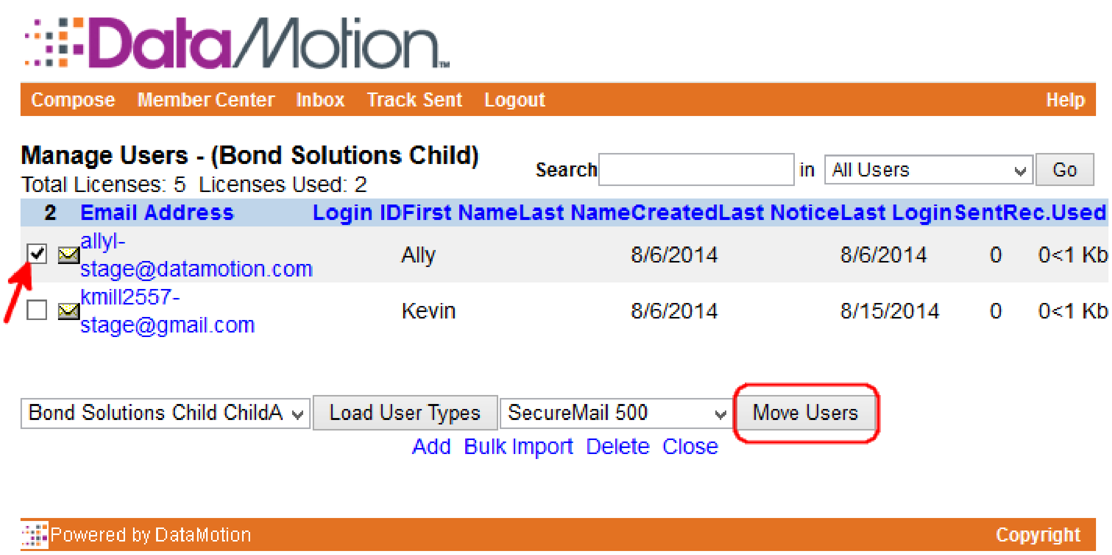
Moving Existing Users

It is now possible for an admin to move existing users within subtenants. The admin is capable of moving users between their company and subtenants beneath them, but they cannot raise anyone above their company into the parent itself. Moving users can be performed by:

1. Being on the Manage Users page and ensuring the destination and user type of the user is correct:



2. Click the check box next to the user you wish to move, and then click the move users button.



3. The user will now be in the company chosen.

Password Management

Once a user account has been created, managing passwords is the primary administrative task for the account. Users are created and managed from a common page allowing the fields to be filled in during account creation or edited later. This includes the password field.

Passwords When Creating an Account

While it is obviously necessary to have a password assigned to a user account for authentication, it is not necessary to set this password during the initial account creation. As such, the Password field is not marked as required for creating a new account.

When a new account is created, if the password field is left blank, a message will be sent to the user's address providing instructions on how to set their password. This is the most common method for creating new users, allowing them to set their own unique passwords.

When a new account is created and the password field is filled, the account will be set with that password. The password will not be sent to the user and it is expected in this case that the user will be informed of the password by other means such as a phone call.

Administrator Password Resets

The other use for the password field is administrator password resets. Users are provided multiple means for resetting their passwords without the need to call support (or the administrator), but there are times when the administrator may need to reset a password manually. The administrator can then use the password field to explicitly set a new password for the user account.

The most common use of this functionality is when a user is no longer in a position which requires DataMotion Direct (such as having left the company) but there is a need to preserve access to the account for audit purposes. The administrator can then reset the password to something new for access to the messages in the account.

Bulk User Import

There are times when you may need to create more than one user account at a time. For this scenario you can use the Bulk Import function to create multiple accounts at once.

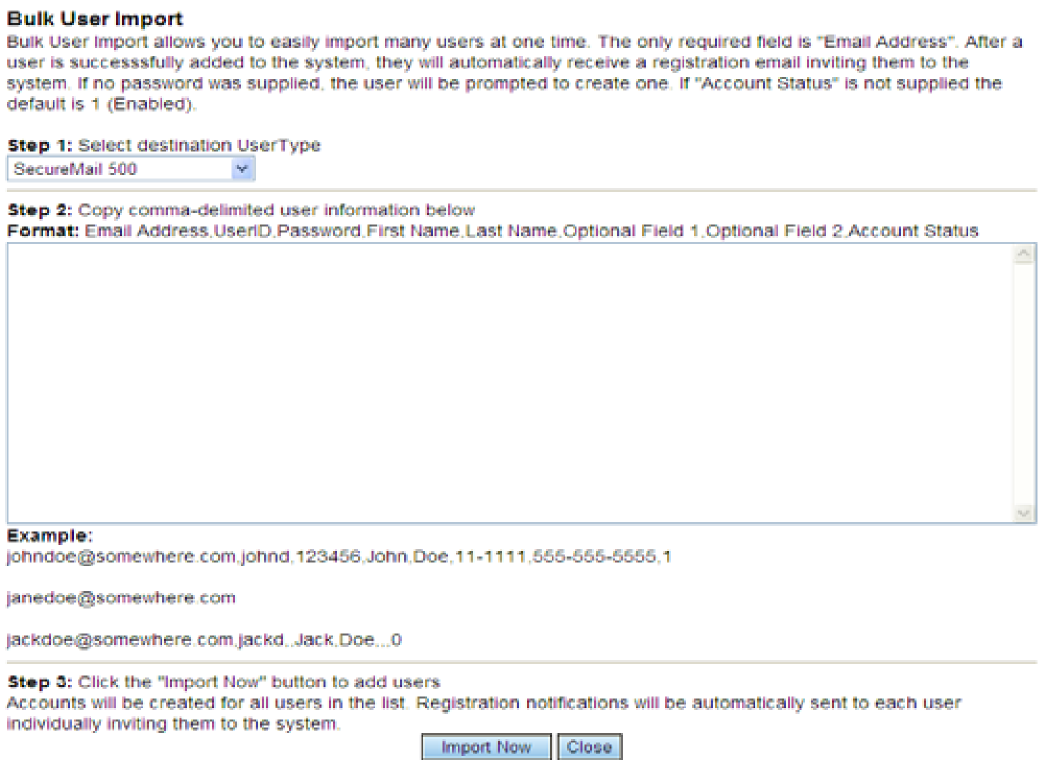
The Bulk Import function uses a comma-delimited format for importing the information. The list of fields is:

```
Message Address,UserID,Password,First Name,Last Name,Employee
ID,Optional Field 2,Account Status
```

NOTE: The Account Status takes a 0 or a 1 to specify if the account is enabled or disabled. A 1 will enable the account, a 0 will disable the account. The default is 1 (enabled).

To create multiple accounts using Bulk Import:

1. From the Manage Users page, click the **Bulk Import** link at the bottom.



2. Select the User Type.

3. Enter the comma-delimited information for the import either by typing or pasting the information.

NOTE: It is possible to specify a list of addresses and no other information to quickly create multiple users, because no other fields are required. These users will all be notified to set the password for their new account.

4. Click **Import Now** to create the user accounts.

5. Click **Close** to return to the Manage Users page.

Deleting User Accounts

User accounts can be deleted from the Manage Users page. To remove a user account (or multiple accounts):

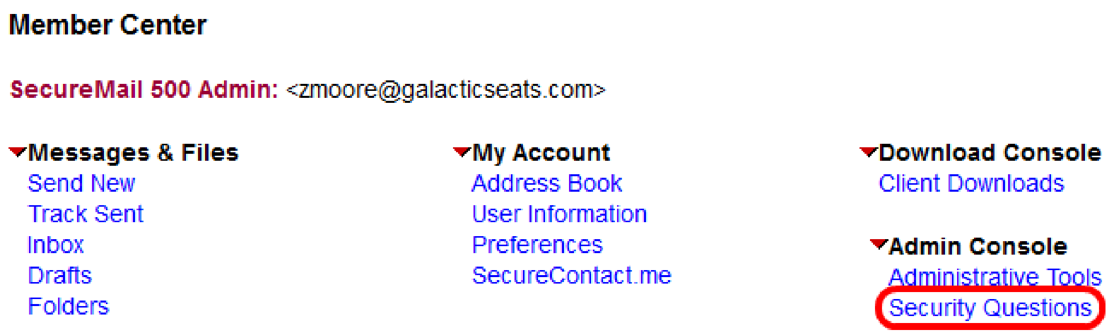
1. Select the account(s) by checking the box at the left of the account line.
2. Click the **Delete** link at the bottom of the page.
3. Click OK to confirm deleting the account(s).

CHALLENGE QUESTIONS FOR PASSWORD RECOVERY

OVERVIEW

DataMotion Direct provides multiple methods for password recovery. By default, there are two methods for resetting passwords: 1) an administrator can reset users' passwords, and 2) an email-based sequence can allow users to reset their passwords. Some organizations prefer using challenge questions to provide confirmation of the user's identity. This feature can be activated for your organization by contacting DataMotion Technical Support.

Once this feature has been activated, a new link appears below the Admin Console called Security Questions.



Working with Technical Support, the administrator can specify two options related to this function: the number of questions a user needs to have answers for, and then the number the user needs to answer to allow the password reset. When enabled, the default settings would require a user to have answered three different questions for future use, and then be required to answer one of those questions for verification. These numbers can be changed according to the needs of your organization.

For more information about how a user interacts with the Challenge questions, see the *DataMotion Direct User Guide*.

CHALLENGE QUESTIONS

To quickly get you started with configuring your challenge questions, DataMotion Direct provides a number of commonly used questions for user verification:

- What year was your mother born?
- What year was your father born?
- Which city did you graduate from High School in?
- What is the name of your first pet?
- Which model was your first car?
- What is your paternal grandmother's first name?

- What is your maternal grandmother's first name?
- What is your mother's maiden name?

These questions are always available.

Adding Customer Challenge Questions

It is possible to create custom challenge questions for your users. These questions will be listed in addition to the built-in set.

To create custom challenge questions for your users:

1. Click the **Security Questions** link under the Admin Console.

Security Questions for Password Recovery

Add New

Question	Company	Visible	Actions
What year was your mother born?	Global Default		
What year was your father born?	Global Default		
Which city did you graduate from High School in?	Global Default		
What is the name of your first pet?	Global Default		
Which model was your first car?	Global Default		
What is your paternal grandmother's first name?	Global Default		
What is your maternal grandmother's first name?	Global Default		
What is your mother's maiden name?	Global Default		

1

2. To add a new question to the list, click **Add New**.
3. In the new field, enter a question.

Security Questions for Password Recovery

Question	Company	Visible	Actions
What year was your mother born?	Global Default		
What year was your father born?	Global Default		
Which city did you graduate from High School in?	Global Default		
What is the name of your first pet?	Global Default		
Which model was your first car?	Global Default		
What is your paternal grandmother's first name?	Global Default		
What is your maternal grandmother's first name?	Global Default		
What is your mother's maiden name?	Global Default		
What is your favorite color?	Galactic Seats		Save Cancel

4. Click Save.

Security Questions for Password Recovery

Add New

Question	Company	Visible	Actions
What is your favorite color?	Galactic Seats		Edit Publish
What year was your mother born?	Global Default		
What year was your father born?	Global Default		
Which city did you graduate from High School in?	Global Default		
What is the name of your first pet?	Global Default		
Which model was your first car?	Global Default		
What is your paternal grandmother's first name?	Global Default		
What is your maternal grandmother's first name?	Global Default		
What is your mother's maiden name?	Global Default		

1

NOTE: This is the last chance to edit this specific question. Once it has been published it will not be able to be edited.

5. Click **Publish** to make the question active.

Security Questions for Password Recovery

Add New

Question	Company	Visible	Actions
What is your favorite color?	Galactic Seats	☑	
What year was your mother born?	Global Default		
What year was your father born?	Global Default		
Which city did you graduate from High School in?	Global Default		
What is the name of your first pet?	Global Default		
Which model was your first car?	Global Default		
What is your paternal grandmother's first name?	Global Default		
What is your maternal grandmother's first name?	Global Default		
What is your mother's maiden name?	Global Default		

1

The question is now added to the list.

Changing Custom Question Visibility

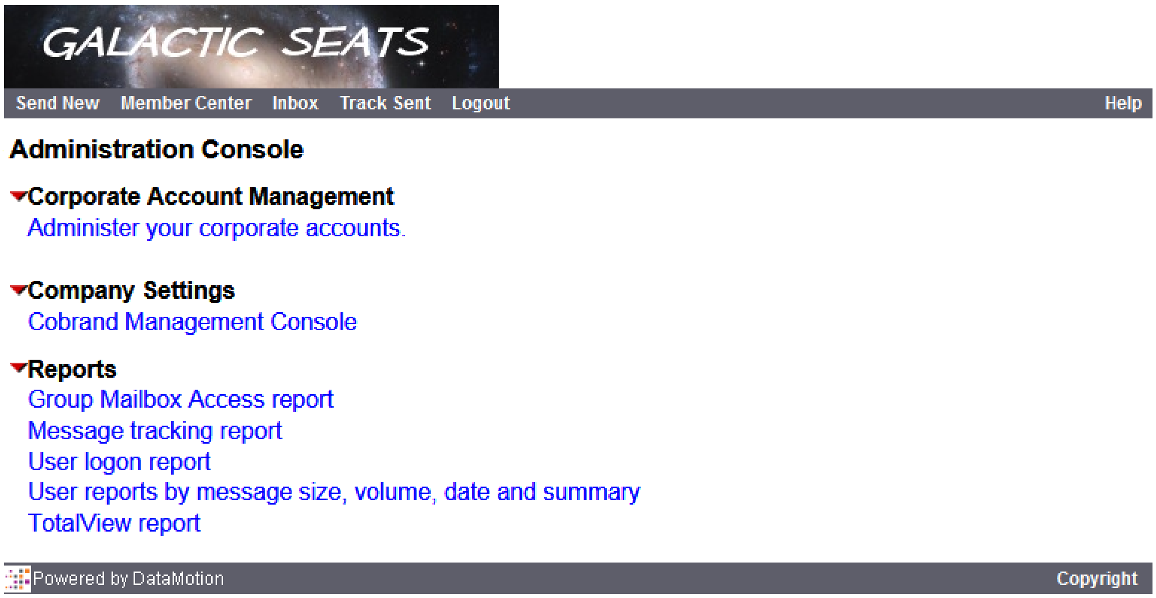
Once a question has been published, its visibility to users can be changed. By default, when a new challenge question is added, it is made visible.

Questions that are visible will have a red check mark in the Visible column. To change the visibility of a question, click the checkbox to toggle the checkmark. If the box is empty the question will not be shown to users.

NOTE: Questions listed as Global Default are the built-in questions and their visibility cannot be toggled.

REPORTS

DataMotion Direct provides Administrators with a range of usage reports they can use to monitor and track how services are being used. All reports are accessed from the Administration Console.



REPORT GENERATION FILTERING INTERFACE

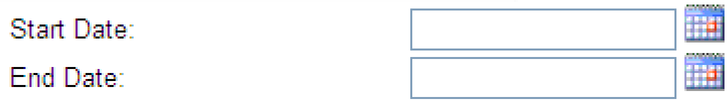
There are two fields commonly found in reports and that can be used for filtering the results shown in the reports.

The first field is the Message Address or Pattern. This field can be used to filter results based on a text pattern related to the messages. When it is left blank, it will show all messages (subject to any other filters that may be defined).

The % symbol is used as a wildcard for this field. It can be placed anywhere in the string to provide flexibility in matching. For example, searching for “r%” would return results beginning with the letter “r”, such as rsmith@galacticseats.com.

See the section Finding Your Users for more information about using the wildcard in searches.

The second field is a date filter. Here you can specify starting and ending dates for your report. The calendar icon will show the dates visually.



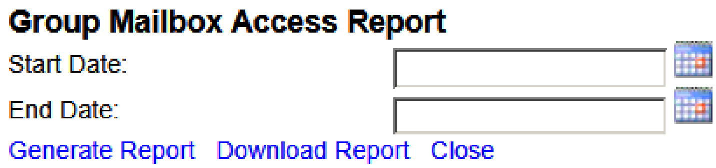
If a field is left blank it will not be used in the filter. For example, if you specify an End Date but not a Start Date, then all messages from the earliest sent until the specified End Date will be shown in the report. If both are blank, all messages would be shown (subject to any other filters that may be defined).

GROUP MAILBOX ACCESS REPORT

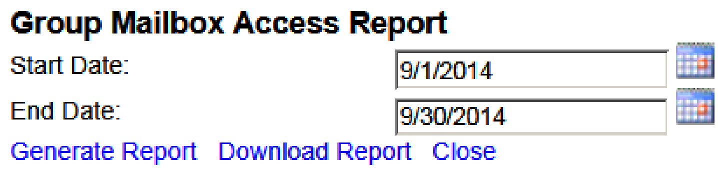
The Group Mailbox Access Report generates reports providing information about user access to Group Mailboxes.

To generate a Group Mailbox Access Report :

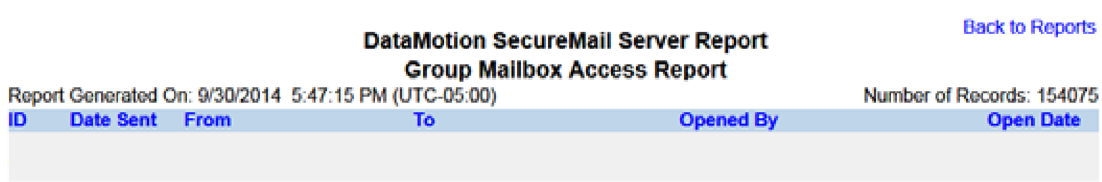
1. Click the Group Mailbox Access Report link from the Administration Console.



2. Enter the search parameters into the Start Date and End Date fields.



3. Click the Generate Report link. The report displays all the user access activity matching the specified criteria. The following report heading shows the categories of data that the report would contain.



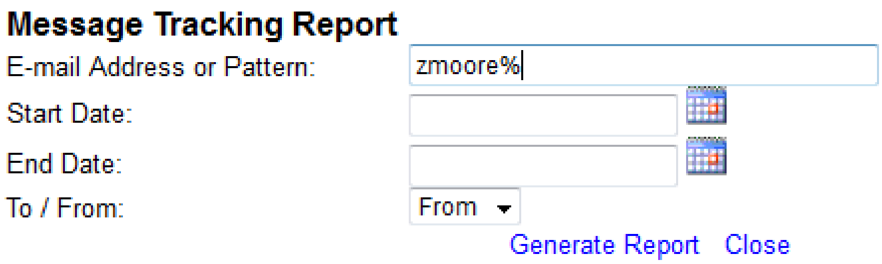
MESSAGE TRACKING REPORT

The Message Tracking Report enables you to look for messages based on pattern matching. The search will look at the message addresses and subject lines to find the matches (message bodies are not searched).

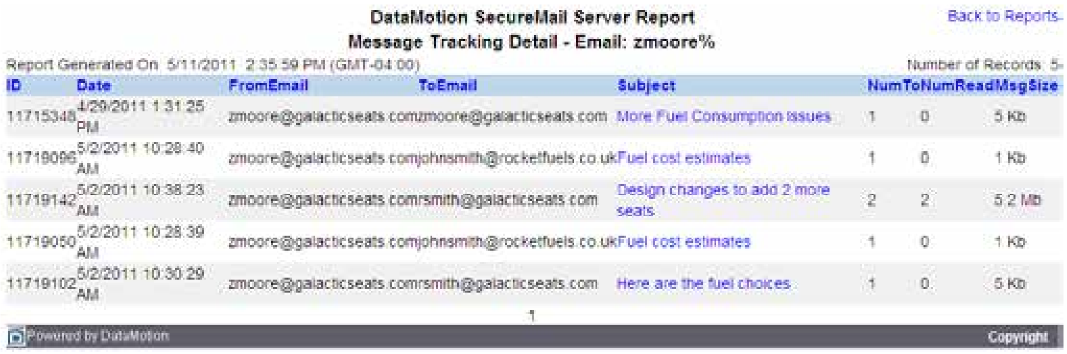
To generate a Message Tracking Report:

1. Click the Message Tracking Report link from the Administration Console.

2. Enter the search parameters into the Message Address or Pattern and Date fields. The To / From field specifies whether to search for the Message Address or Pattern in the message To or the From field.



3. Click the Generate Report link.



DataMotion SecureMail Server Report
Message Tracking Detail - Email: zmoore%

Back to Reports

Report Generated On 5/11/2011 2:35:59 PM (GMT-04:00)

Number of Records: 5

ID	Date	FromEmail	ToEmail	Subject	NumTo	NumRead	MsgSize
11715348	4/29/2011 1:31:25 PM	zmoore@galacticseats.com	zmoore@galacticseats.com	More Fuel Consumption issues	1	0	5 Kb
11719096	5/2/2011 10:28:40 AM	zmoore@galacticseats.com	johnsmith@rocketfuels.co.uk	Fuel cost estimates	1	0	1 Kb
11719142	5/2/2011 10:38:23 AM	zmoore@galacticseats.com	rsmith@galacticseats.com	Design changes to add 2 more seats	2	2	5.2 Mb
11719050	5/2/2011 10:28:39 AM	zmoore@galacticseats.com	johnsmith@rocketfuels.co.uk	Fuel cost estimates	1	0	1 Kb
11719102	5/2/2011 10:30:29 AM	zmoore@galacticseats.com	rsmith@galacticseats.com	Here are the fuel choices	1	0	5 Kb

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Powered by DataMotion Copyright

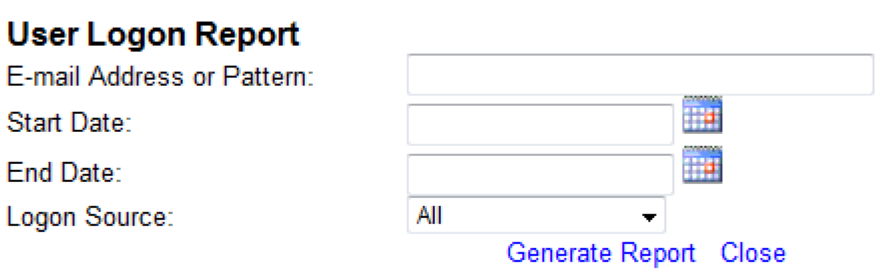
The report displays all the messages matching the specified criteria.

USER LOGON REPORT

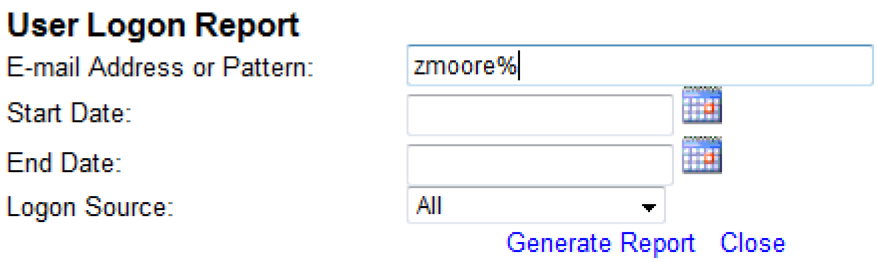
The User Logon Report generates reports about user logon activity. You can look at activity for specific users, defined timeframes and also how the user logged into the service.

To generate a User Logon Report:

1. Click the User Logon Report link from the Administration Console.



2. Enter the search parameters into the Message Address or Pattern and Date fields. The Logon Source field specifies which service the user accessed. The default is All which will show every service the user has used.



3. Click the Generate Report link.

DataMotion SecureMail Server Report
User Logon Report - Email: zmoore%

Back to Reports

Report Generated On: 5/11/2011 2:41:30 PM (GMT-04:00) — Number of Records: 17

Date	Email	FName	LName	Source	IP	Status
5/5/2011 9:46:23 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
5/5/2011 9:45:19 AM	zmoore@galacticseats.com			Web	65.51.178.218	Invalid
5/5/2011 9:20:40 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
5/2/2011 10:47:48 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
5/2/2011 9:28:40 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/29/2011 1:49:41 PM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/29/2011 1:10:20 PM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/29/2011 12:06:07 PM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/29/2011 8:20:28 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/26/2011 9:52:35 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/26/2011 9:37:33 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/25/2011 3:06:03 PM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/25/2011 10:36:28 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/25/2011 10:16:52 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/21/2011 10:26:50 AM	zmoore@galacticseats.com			Web	65.51.178.218	Success
4/20/2011 5:23:49 PM	zmoore@galacticseats.com			Web	96.242.182.115	Success
4/20/2011 5:23:49 PM	zmoore@galacticseats.com			Unknown		Success

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The report displays all the logon events for the user based on the specified criteria.

USER REPORTS

There are several types of user reports, each of which can be filtered for sent or received messages (or both) for each user. These reports are summaries of user statistics as compared to the detailed reports like the Message Tracking Report.

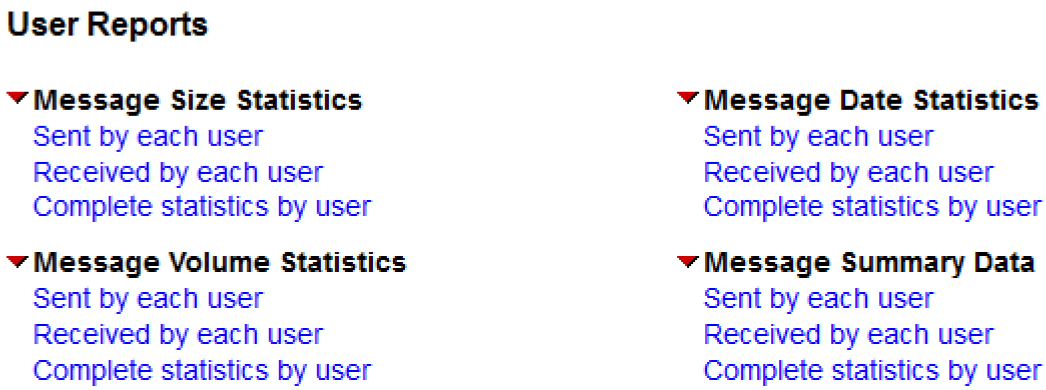
The following types of reports can be seen:

Report Type	Description
Message Size Statistics	Shows the size of messages sent and received by each user.
Message Date Statistics	Shows when messages have been sent by the users (first and last messages for each user).
Message Volume Statistics	Shows the number of messages sent/received by the user.

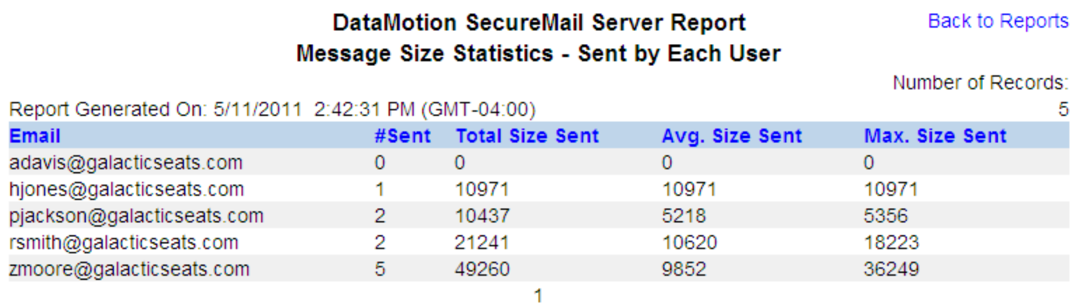
Report Type	Description
Message Summary Data	Shows the fields of the other statistics reports on one screen.

To access any User Report:

1. Click on the User reports by message size, volume, date and summary link.



2. Click on the report to be shown; for example: Message Size Statistics: Sent by each user. (shown in the following screen).



DataMotion SecureMail Server Report
Message Size Statistics - Sent by Each User

Back to Reports

Number of Records: 5

Report Generated On: 5/11/2011 2:42:31 PM (GMT-04:00)

Email	#Sent	Total Size Sent	Avg. Size Sent	Max. Size Sent
adavis@galacticseats.com	0	0	0	0
hjones@galacticseats.com	1	10971	10971	10971
pjackson@galacticseats.com	2	10437	5218	5356
rsmith@galacticseats.com	2	21241	10620	18223
zmoore@galacticseats.com	5	49260	9852	36249

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TOTALVIEW REPORT

The TotalView Report is one of the most powerful tools for the DataMotion Direct administrator. The TotalView Report provides complete tracking of all messages sent through the DataMotion Direct system. The report contains a record of every message sent along with the tracking data for the message and any attachments in a single report. This report is provided as a CSV file (comma-separated value file) which can be evaluated in other programs, such as Microsoft Excel.

The TotalView report includes the following fields:

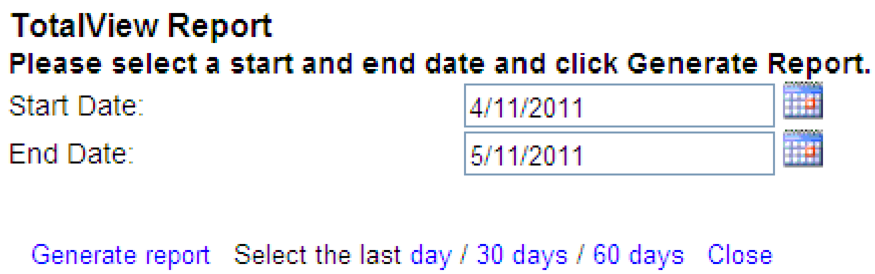
- Message ID
- Date

- From
- To
- Subject
- Notification Timestamp
- Message Status — Not Opened, Opened
- Message Open Time
- Attachment Name
- Attachment Status – Not Accessed, Accessed
- Attachment Open Time

Each message and every attachment within a message is reported individually. For example, a message to two recipients with two attachments will generate four rows of data, two for each recipient, with one attachment listed on each line per recipient.

To generate a TotalView Report:

1. Click the TotalView Report link.



2. Specify the Date range for the report.
   » There are quick options for the last day, 30 days, and 60 days below the standard Date fields. These will automatically select the specified time period.
3. Click the Generate Report link.

4. Click Download Report to save the CSV file for local use.

FORM TRACKING REPORT

Similar to the TotalView report for messages is the Form Tracking Report for SecureForms. This report will show all SecureForms that have been sent through the DataMotion Direct server and all the tracking information associated with the SecureForm. This report is provided as a CSV file (comma-separated value file) which can be evaluated in other programs, such as Microsoft Excel.

To generate a Form Tracking Report:

1. Click the Form Tracking Report link.

2. Specify the Date range for the report.
3. Click the Generate Report for the above dates or the Generate Report for last month link.
   » The Generate Report for last month will ignore the dates specified in the Date fields and automatically calculate the last month.

4. Click Download Report to save the CSV file for local use.

This concludes the information about DataMotion Direct Reports.

2
DataMotion Direct Integration with Typical Environments

This information describes how to integrate DataMotion Direct with some typical environments, including the following:

- *SendSecure Button for Microsoft Outlook: Group Policy Network Installation* (below)
- *SendSecure Button for Microsoft Outlook: Installation with Citrix/Terminal Services* (on page 50)
- *SendSecure Button for Lotus Notes: Installation* (on page 50).

The SendSecure Button add-in allows users to send secure messages from within their normal email interface.

SENDSECURE BUTTON FOR MICROSOFT OUTLOOK: GROUP POLICY NETWORK INSTALLATION

OVERVIEW

The SendSecure add-in for Microsoft Outlook provides one-click sending of secure messages. SendSecure is available in a Corporate version that can be automatically distributed to specific desktops from the network. The following procedure describes the steps required to distribute this button using Microsoft Active Directory and the Group Policy Management MMC snap in.

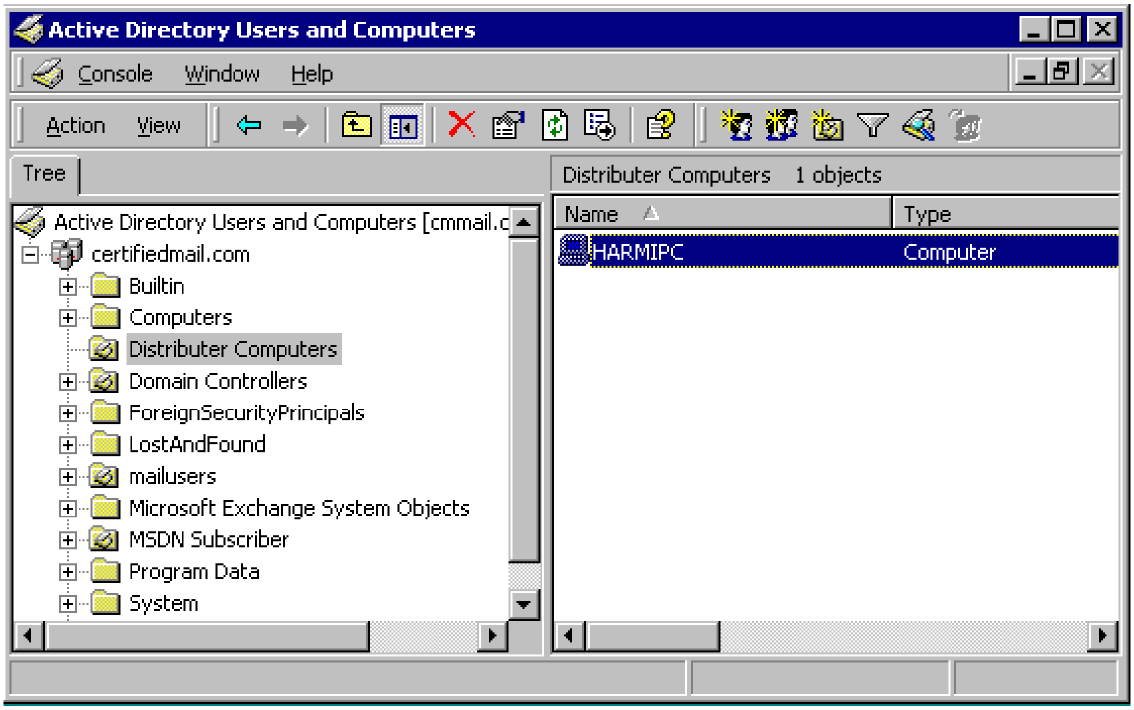
NOTE: In this information, “CertifiedMail” is a synonym for “DataMotion Direct.”

STEP-BY-STEP PROCEDURE

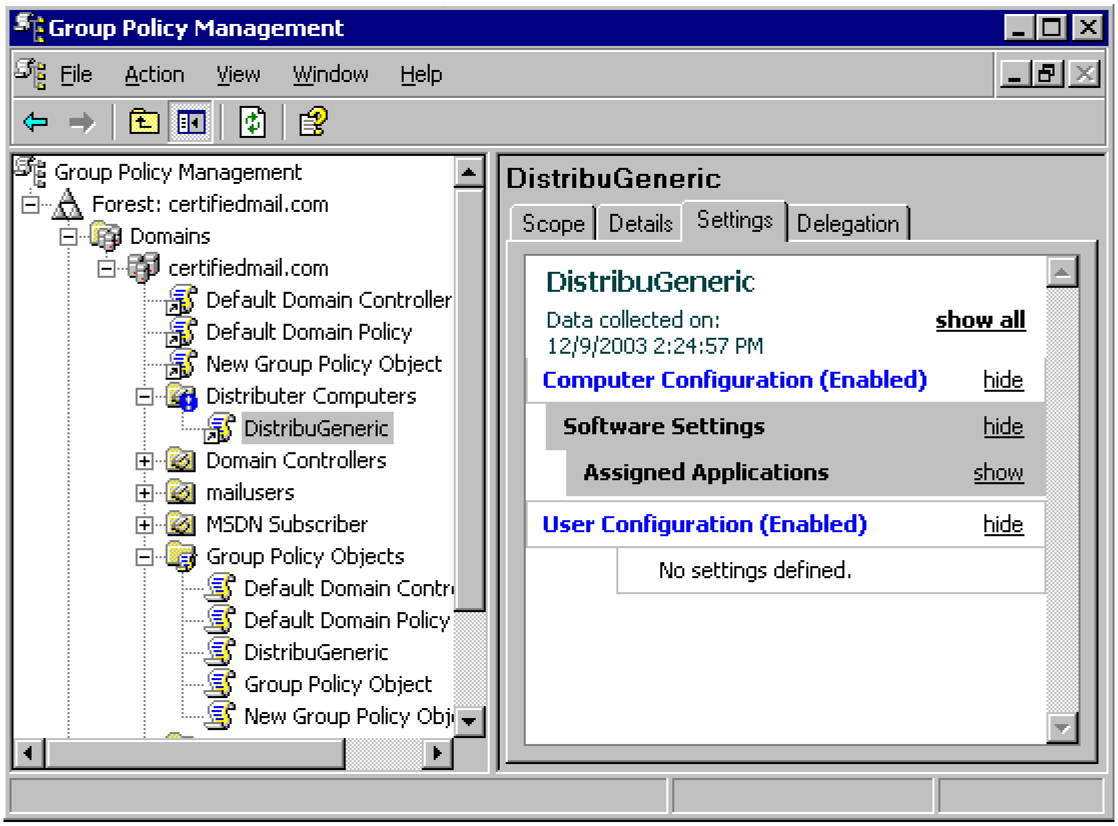
1. From your Active Directory Domain Controller, launch Active Directory Users and Computers from the Start | All Programs | Administrative Tools menu.

2. Create a new Organizational Unit (OU) that will contain computer names to distribute the SendSecure add-in. In this example, an OU named "Distributer Computers" was created.
3. Add computers to the OU that will receive the SendSecure add-in. In this example, computer "HARMIPC" was added to the new "Distributer Computers" OU.

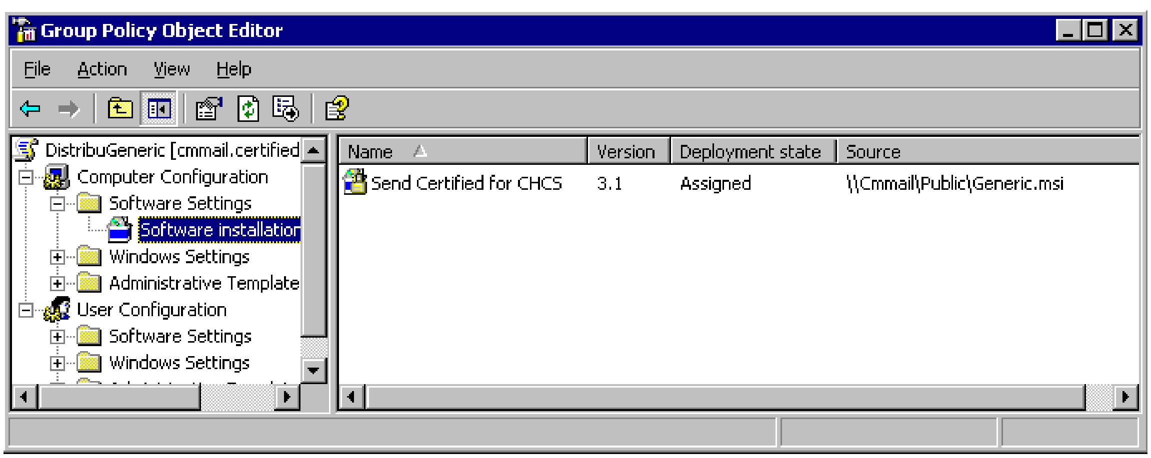
NOTE: To add many computers to the "Distributer Computers" OU, it is recommended that you create a Group under the Computers node. Then assign multiple computers to this Group. Instead of adding individual computers to the "Distributer Computers" OU, simply add the one Group entry to represent all computers in the Group.



4. Right click on the new "Distributer Computers" OU and choose "Create and Link a GPO Here".
5. Make a new Group Policy Object (GPO) at your new OU. In this example, the GPO will be named "DistribuGeneric".



6. Right click on the new GPO and choose Edit. In the Group Policy Object Editor window, expand Computer Configuration->Software Settings->Software installation. Right click on "Software installation" and choose a new package.
7. Copy your SendSecure "Generic.msi" file to a directory on your network that can be accessed by all workstations that are members of "Distributer Computers". Then browse to this path and file to add it to Computer Configuration->Software Settings->Software installation.



NOTE: Make sure you give the Computer or Group of computers account read permissions to that network share folder and also to the SendSecure "Generic.msi"

file. If using individual Computer accounts, they are typically represented by Computername+$, for example, HARMIPC$.

8. On the “Deploy Software” dialog, choose “Assigned” as the deployment method so that the SendSecure Generic.msi software will automatically run.

NOTE: Do not deploy the “Generic.msi” file under the GPO User Configuration tree, as it will need a workstation user that has local administrator rights to install the software. By deploying to the Computer Configuration tree, the credential to install the software is the local system account which always has local administrator rights on that computer.

This concludes the installation.

SENDSECURE BUTTON FOR MICROSOFT OUTLOOK: INSTALLATION WITH CITRIX/TERMINAL SERVICES

The SendSecure Button add-in for Microsoft Outlook allows users to send secure messages from within their normal email interface.

The SendSecure Button add-in can be installed in a Terminal Services/Remote Desktop/Citrix environment.

The Corporate version of the SendSecure Button must be used. The Corporate button uses a single encryption key shared by all customers/users with that version of the add-in. (This is different from the Personal SendSecure Button, which users can download individually from the DataMotion webmail portal. The Personal button uses an individual encryption key that is different for each user, so users must download and install their own unique version of the button that cannot be installed for any other user.) The SendSecure Button looks the same to users whether it is the Corporate or Personal button.

The Corporate version of the SendSecure Button can be installed normally on the server running Terminal Services. Make sure to close Microsoft Outlook before you install. After installation, desktop clients (up to the number of licensed users) can use the SendSecure Button .

SENDSECURE BUTTON FOR LOTUS NOTES: INSTALLATION

OVERVIEW

DataMotion Direct integrates with the Lotus Notes client to provide one-click sending of secure messages.

DataMotion Direct for Lotus Notes is implemented in LotusScript and is added to your existing mail template in a standard manner using Lotus Domino Designer where it can be distributed to specific workstations using Notes Template Replication.

This document was written for Lotus Notes developers to allow them to integrate DataMotion Direct functionality with Lotus Notes Mail templates v5 and higher. Screen images and descriptions were made using Domino Designer v7. Prior or later versions work in a similar way, but will differ slightly from the version shown.

KEY ASPECTS

The following are the high level components that are involved in the integration process.

DataMotion Direct “Send Secure” Script File

You will use one of the following files to add LotusScript to the Notes Mail template:

```
Direct.txt OR
Direct-Redirection.txt or Direct-Tagging.txt
```

Mail Template Modifications

Forms Modified:

```
Memo
Reply
Reply with History
```

Fields Added:

```
None
```

New Actions

```
Added to forms Memo, Reply, Reply with History
Send Secure
```

These actions are added just below Send in the Action Pane.

New Resources

```
None
```

INSTALLATION INSTRUCTIONS

The following instructions are shown using the IBM Lotus Domino Designer released for Notes/Domino v7.x. This procedure has been used on Notes versions 5 and higher.

DataMotion Direct Button Options

There are two ways to integrate DataMotion Direct into your Lotus Notes mail system. These are called Redirection and Tagging. In either case the end user experience is the same (they click the SendSecure button), but the two methods result in different mail flow.

Redirection Description

When using Redirection, messages sent via the SendSecure button have the recipient list replaced with the message address of the DataMotion Direct server, where it will be encrypted and then securely delivered to its destination. This requires configuration on the Domino server to ensure a secure route between your mail server and the DataMotion server.

Tagging Description

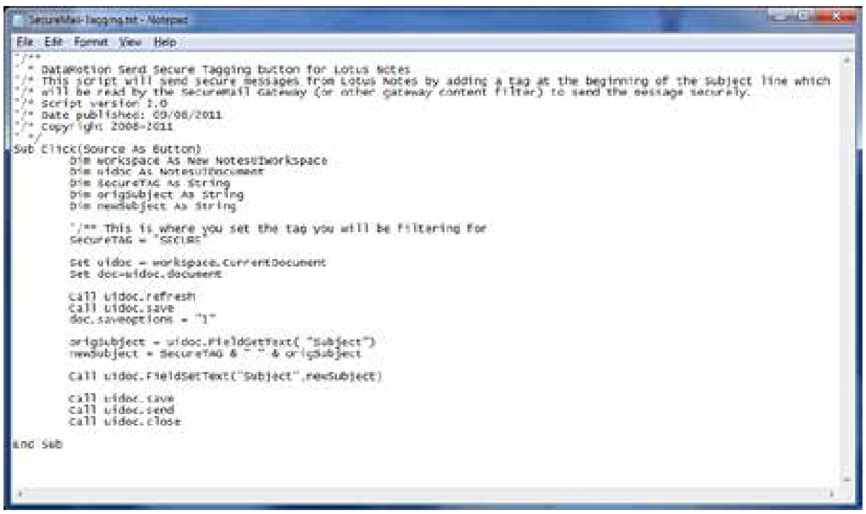
When using Tagging, messages sent via the SendSecure button have a special tag (e.g., SECURE) inserted at the beginning of the Subject line. This requires that the outbound mail flow include a server containing a content filter (typically the DataMotion Direct Gateway) that is used to scan for the tag and then securely route the message to the DataMotion Direct server.

NOTE: When using the Tagging configuration, if there is not some sort of content filter that can scan for the subject line tag, the messages will not be sent securely.

Each configuration is installed the same way, the only difference being the selection of the file with the configuration you need to use.

Adding the DataMotion Direct LotusScript to your Mail Template

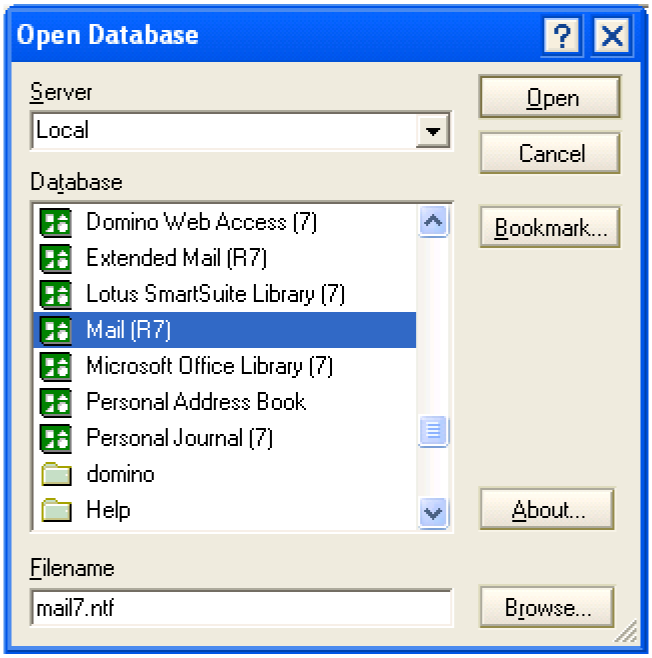
1. Open the appropriate script in a text editor (e.g. Notepad). The files below are named according to the type of button you are installing.
   - » Direct-Redirection.txt
   - » Direct-Tagging.txt



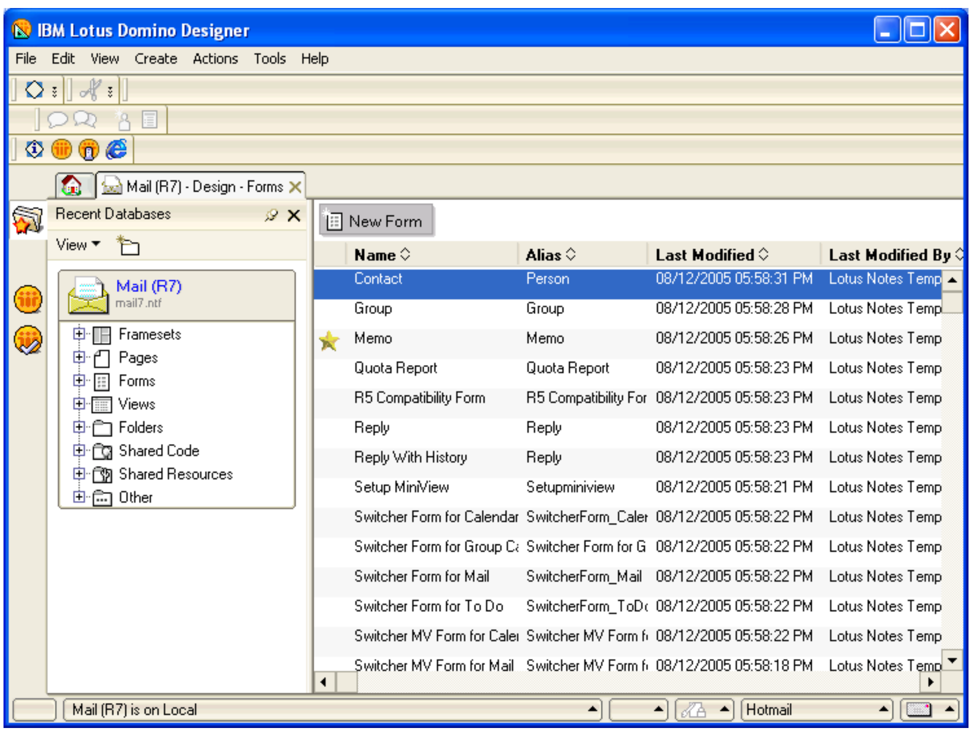
```
'/**
'* DataMotion Send Secure Tagging button for Lotus Notes
'/* This script will send secure messages from Lotus Notes by adding a tag at the beginning of the subject line which
'/* will be read by the SecureMail Gateway (or other gateway content filter) to send the message securely.
'/* Script version 1.0
'/* Date published: 09/08/2011
'/* Copyright 2008-2011
' */
Sub Click(Source As Button)
	Dim workspace As New NotesUIWorkspace
	Dim uidoc As NotesUIDocument
	Dim SecureTAG As String
	Dim origSubject As String
	Dim newSubject As String

	'/** This is where you set the tag you will be filtering for
	SecureTAG = "SECURE"

	Set uidoc = workspace.CurrentDocument
	Set doc=uidoc.document

	Call uidoc.refresh
	Call uidoc.save
	doc.saveoptions = "1"

	origSubject = uidoc.FieldGetText( "Subject")
	newSubject = SecureTAG & " " & origSubject

	Call uidoc.FieldSetText("Subject",newSubject)

	Call uidoc.save
	Call uidoc.send
	Call uidoc.close

End Sub
```

NOTE: If you are running DataMotion Direct locally, you must change the two instances of "ssl.datamotion.com" to refer to your own local server.

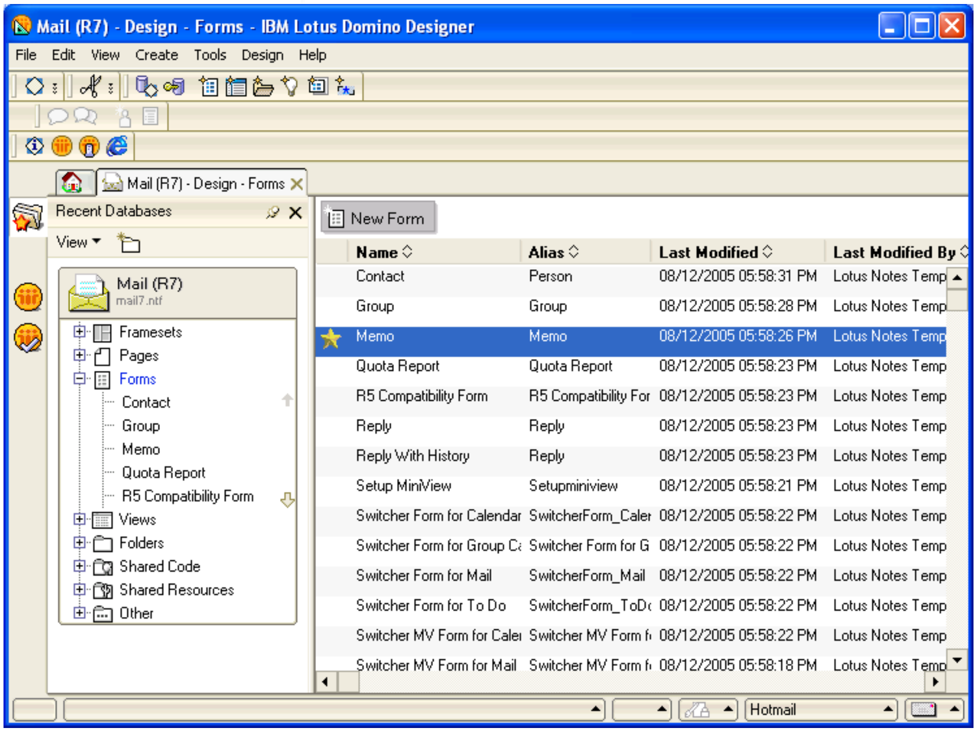
2. From Lotus Domino Designer, open your existing Mail template:
File à Database à Open



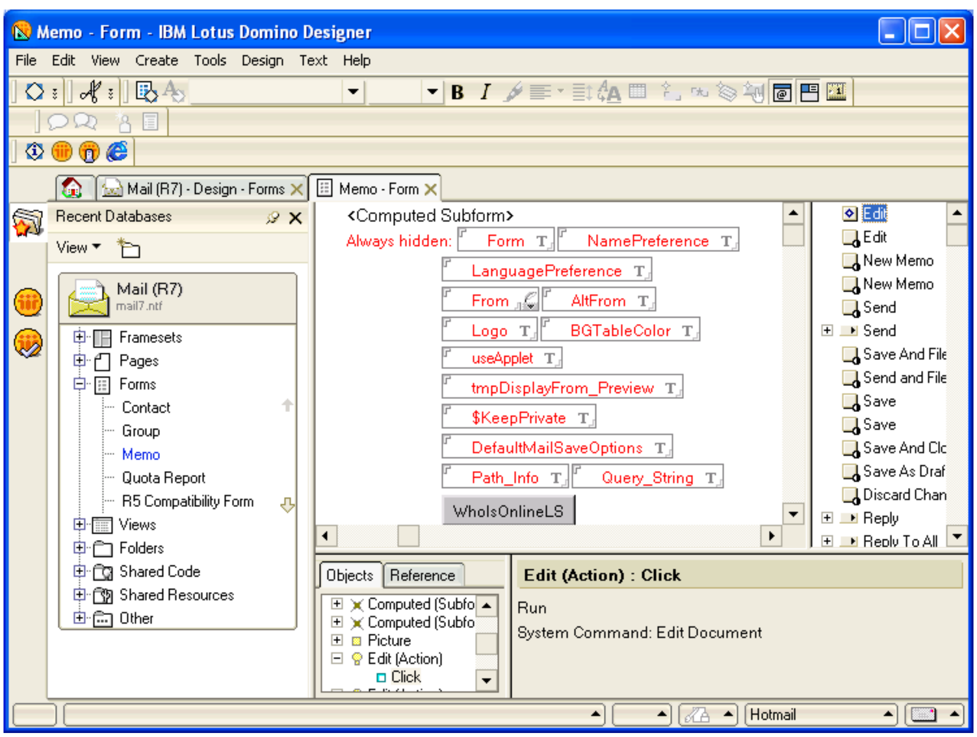
3. Your Lotus Domino Designer screen should now look similar to the following:



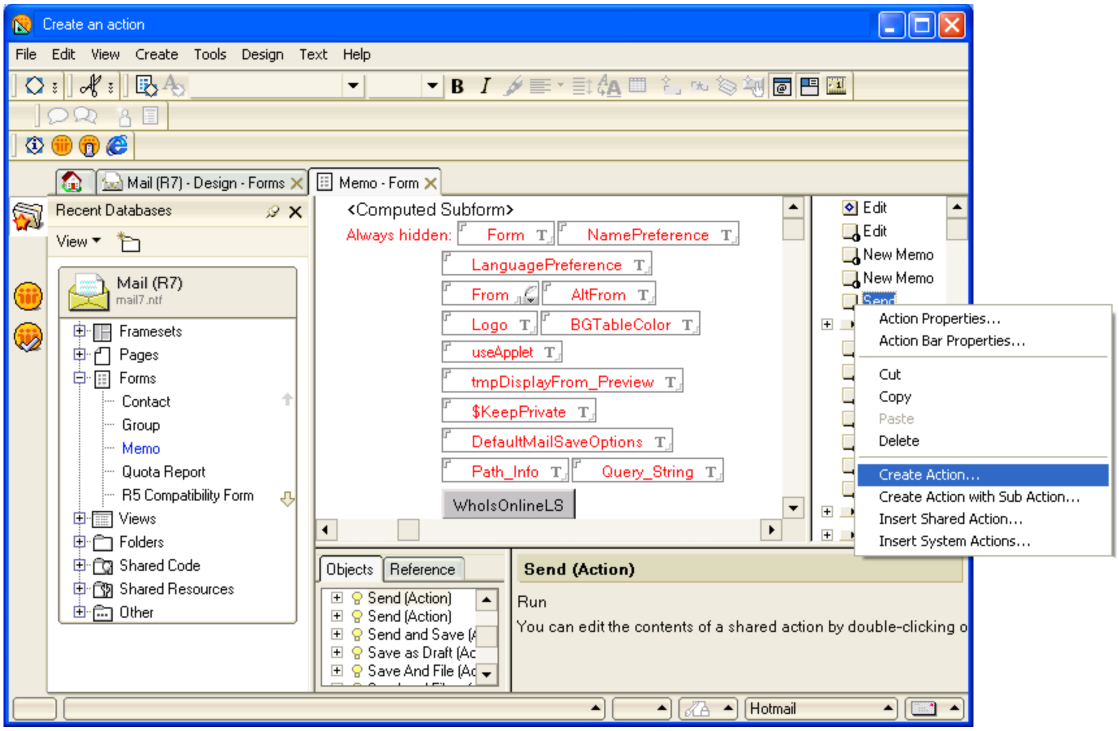
4. Select and open the **Memo** form in the right panel.



5. Ensure that the menu “View à Action Pane” is checked, which will display the Action Pane on the right side of the Domino Designer.



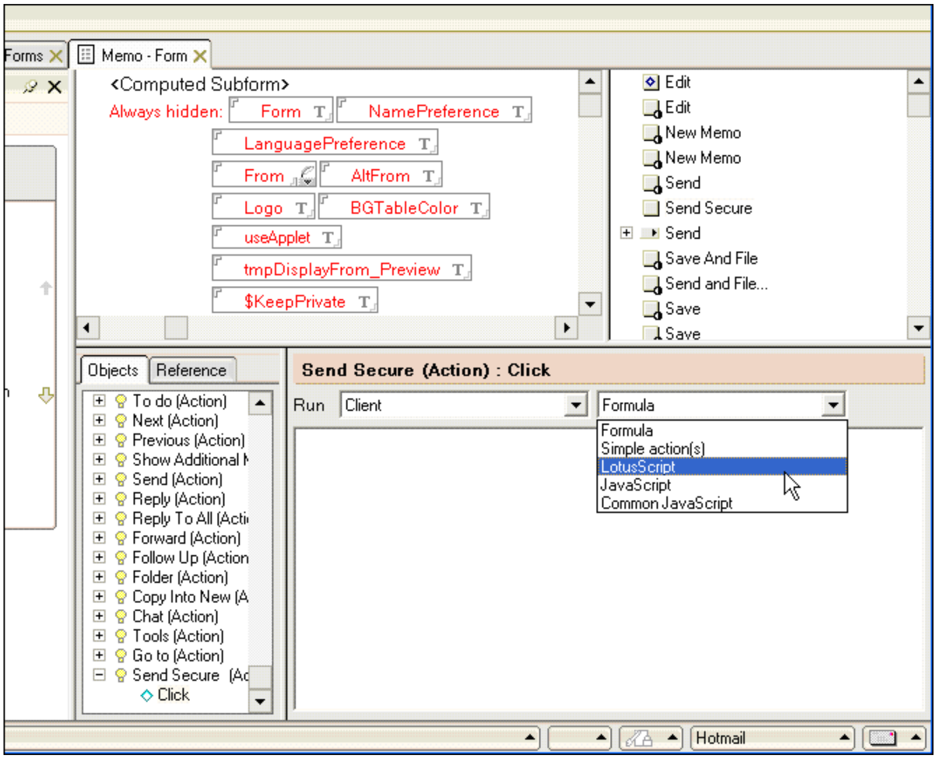
6. Highlight the first Send item in the Action panel in the right side of the screen. Then right click to display the pop-up menu and choose the “Create Action” menu choice.



7. In the Action pop-up dialog, type “Send Secure” in the action’s Name field. Then close the dialog by clicking the “X” in its top-right corner.

8. The Send Secure action should now be highlighted, and the bottom script area should reference this new action.

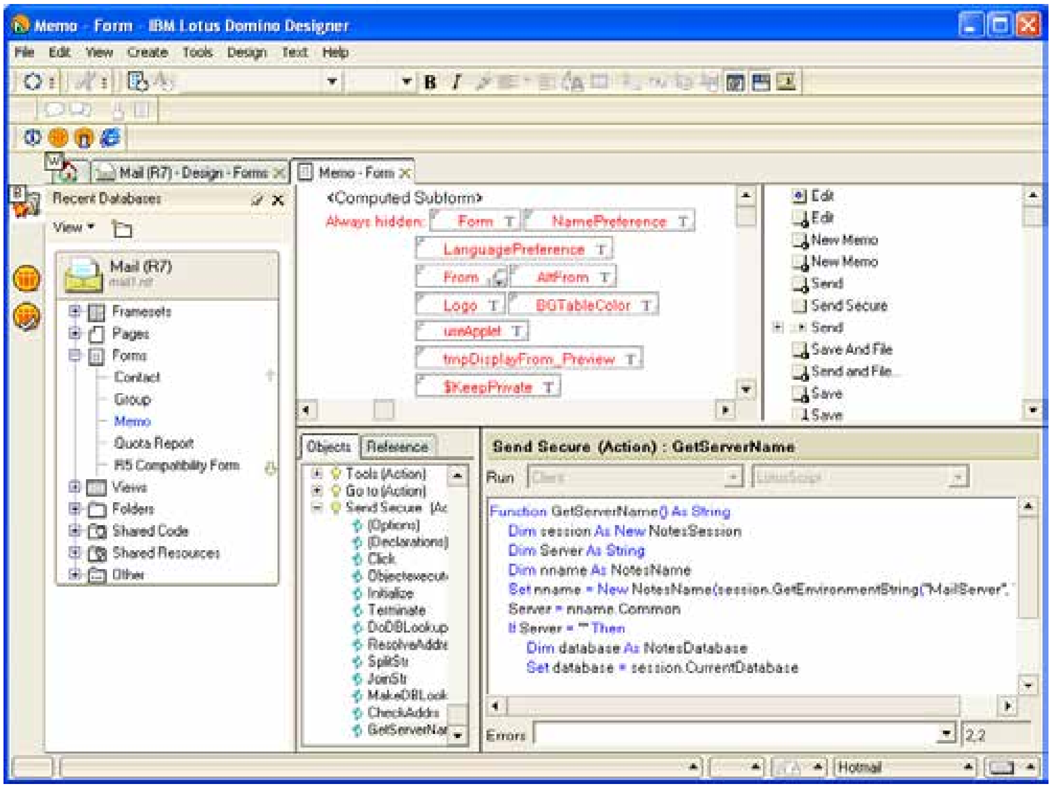
9. Change the script area pull downs to “Client” and “LotusScript”.



10. Select and delete the empty “Sub Click(Source As Button)” routine including the “End Sub” statements.

11. From your text editor where the DataMotion script file is open (Direct-Redirection.txt or Direct-Tagging.txt), select and copy all of the text to the clipboard.

12. Return to the Domino Designer and paste the text from the clipboard into the blank script area.



The **Send Secure** action and its supporting LotusScript functions have now been added to the **Memo** form.

13. Save the form.

14. Repeat the preceding steps to add the **Send Secure** action to the **Reply** and **Reply with History** forms.

After saving the **Memo**, **Reply** and **Reply with History** forms, the update of your Lotus Notes Mail template is complete.

3
SecureForms Standard

This information describes how to create DataMotion SecureForms Standard, including PDF and HTML SecureForms, and how to access SecureForm data. It does not describe the features and operation of DataMotion SecureForms Enhanced.

NOTE: This information applies only if your license includes DataMotion SecureForms Standard.

SECUREFORMS STANDARD OVERVIEW

DataMotion SecureForms are a simple yet powerful way to extend your business processes and provide your constituents an easy way to send you sensitive information through a secure, compliant tool. SecureForms leverage the same platform as DataMotion Direct, and integrate into your existing workflows to improve efficiencies, save time, and cut costs.

DataMotion SecureForms automates, secures and tracks the method of collecting and processing confidential information from your customers, employees and partners. Using SecureForms eliminates the need to manually read information from a form and enter it into an application – an error prone activity. The end user provides data into form fields that are specific to your business process needs. This data is transported over an encrypted channel and delivered in XML or CSV formats to the message address chosen by your organization. Data can also be displayed within the original form for printing and reference.

Best of all, with SecureForm Tracking and TotalView reporting, SecureForms provides you with visibility into the movement of information all the way to the destination message address or business workflow. Form recipients embrace SecureForms because it allows them to complete and submit the form in one easy step, at their convenience and right from their local machine.

TYPES OF SECUREFORMS

DataMotion supports different two types of SecureForms to meet your needs: SecureForms PDF and SecureForms Web.

SECUREFORMS PDF

These are PDF forms that can be sent to end user customers, patients, employees, etc. as an attachment or downloaded from your website. The forms can be completed at the recipient's convenience using any PDF reader such as Adobe Reader.

SECUREFORMS WEB

These are web-based forms, typically created in HTML that are hosted on your web site, and are accessed, completed, and submitted by end-users during an active web session.

CREATING SECUREFORMS

Most existing web-based or PDF forms can be converted to a DataMotion SecureForm by adding routing instructions code to the form. The code enables the completed forms data to be securely submitted to the DataMotion Portal, where it is then securely delivered into your organization.

TECHNICAL REQUIREMENTS

While DataMotion provides the proper routing instructions code, the actual creation and maintenance of the eForms is handled by customers.

To create PDF SecureForms, you will need a PDF Editor with forms creation capabilities. Examples include:

- Adobe Acrobat Standard/Pro
- Nitro Pro
- Foxit PhantomPDF

To create HTML SecureForms, any HTML editor can be used. An example of a freeware HTML editor is Microsoft Visual Studio Express (Web Developer Express).

The DataMotion Support team will provide your developers the code, documentation, and a test account to enable data routing to the DataMotion portal.

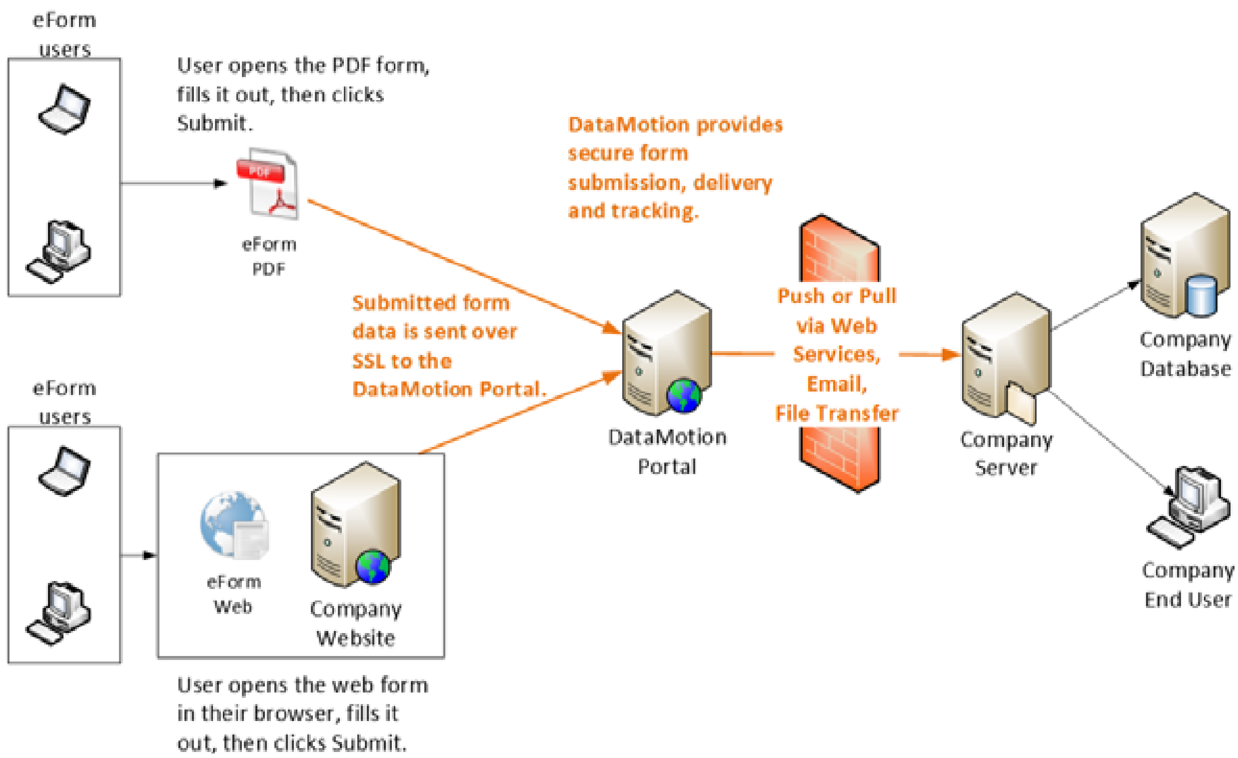
SECUREFORMS ARCHITECTURE

Web-based SecureForms are hosted on your own web site. PDF SecureForms can be distributed to external users as a file attachment or you may provide them on your website for downloading as needed. You decide the best way to deliver them to your users.

An end user accesses a DataMotion SecureForm as they would any other form, such as by using a PDF reader or a web browser, and the user enters the requested data in the fields. When the user submits the completed form, the data is encrypted and securely delivered to the DataMotion Portal over an SSL connection.

After the data is received by the DataMotion Portal, it is queued for delivery to your specified DataMotion account. Data from multiple SecureForms can be delivered to the same account if desired. The SecureForm data can then be retrieved in several ways: it can be downloaded as a DataMotion Direct message, downloaded via SecureFileTransfer, or your internal systems can pull the data from the DataMotion portal using the DataMotion Adapter.

Once the data is delivered to your environment, it can be imported directly into your own systems or databases or reviewed manually by employees as needed.



WORKFLOW INTEGRATION

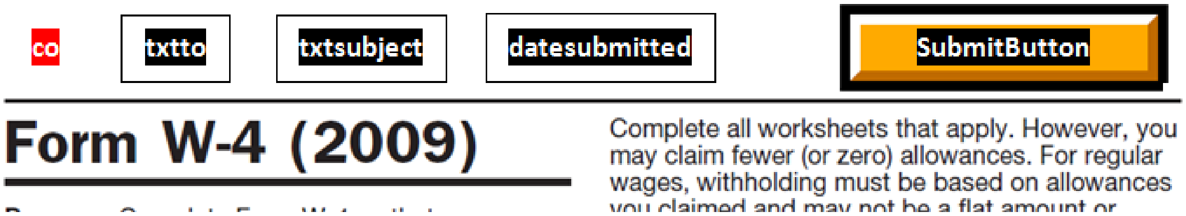
DataMotion SecureForms can be integrated directly into your forms workflow using tools from DataMotion. These include the DataMotion Adapter and the Large File Transfer Client. These tools automatically retrieve submitted SecureForms data from the DataMotion Portal, and place it into your local systems for processing without any manual intervention by your users.

SECUREFORMS PDF CREATION INSTRUCTIONS

To create a SecureForms PDF form, the following hidden fields must be added:

- co – the company ID (coid) of the company that is provisioned with the secure forms (provided by DataMotion)
- txtto – the message address that will be receiving the form
- txtsubject – the subject line of the message when the form is submitted
- datesubmitted – a data variable

The following is an example of the hidden fields in a SecureForm:

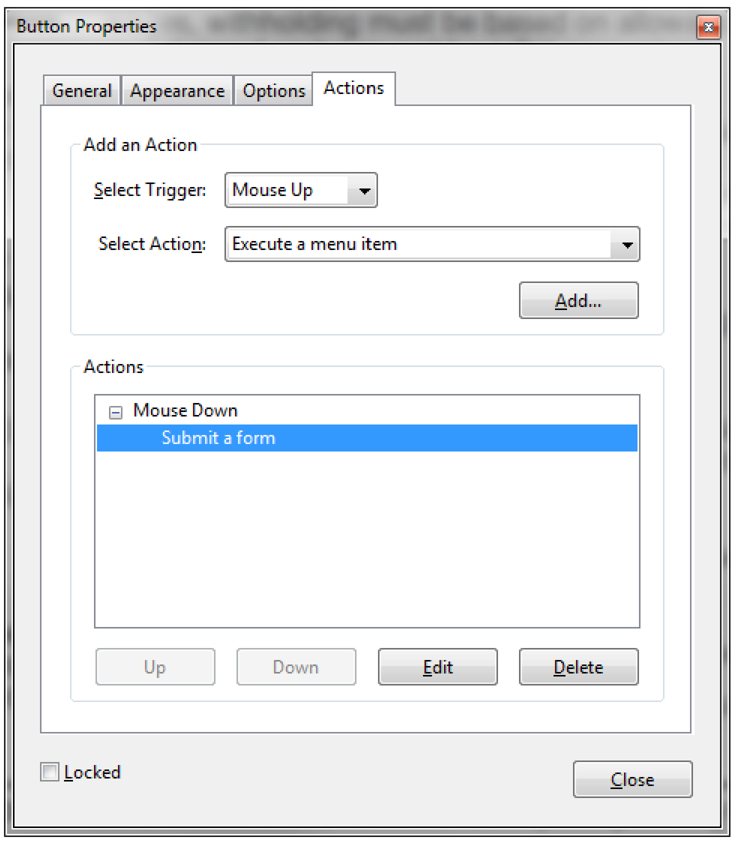


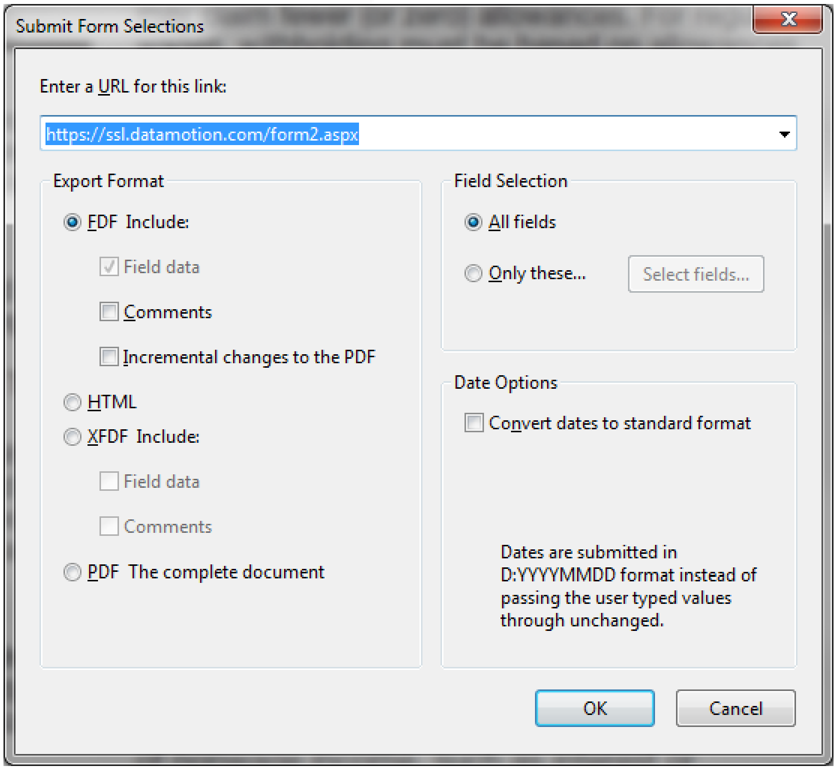
The Submit Button settings on the form should have the following values:

- Enter a URL for this link:
  - For *DataMotion Direct* customers: https://ssl.dmhisp.com/form2.aspx
  - For *DataMotion SecureMail* customers: https://ssl.datamotion.com/form2.aspx
- Export Format: FDF Include – Field Data.

Adobe Acrobat 9 or higher is required to edit forms and open the FDF (Forms Data Format). End-users may use Adobe Reader or another compatible PDF reader to fill out forms.

SAMPLE SUBMIT BUTTON CONFIGURATION IN ADOBE ACROBAT PROFESSIONAL





NOTE: This example screen shows the URL for DataMotion SecureMail customers: https://ssl.datamotion.com/form2.aspx.
For DataMotion Direct customers, the URL should be: https://ssl.dmhisp.com/form2.aspx.

FORM FIELD NAME RESTRICTIONS

Form field names have a number of restrictions. If a form contains fields with a restricted name, the form will not properly submit. The following is the list of field name restrictions:

- Field names cannot contain the following characters
  - % - percent sign
  - / - forward slash
  - \ - backward slash
  - . – period
- Field names cannot start with a number (they may contain numbers, just not start with them)

SECUREFORMS WEB CREATION INSTRUCTIONS

The customer is required to provide DataMotion with a reasonably generic form including JavaScript validation if validation is required.

HTML SECUREFORM CREATION

Some basic knowledge of HTML is required. Visual Web Developer Express 2010, which can be downloaded for free is a great tool to build the form. This tool can be used to drag and drop all items onto the form, and do HTML editing and customization. The HTML customization is required to display all the fields properly to the recipient user of the form, and provide the proper names for the fields in the XML attachment. Care should be taken because things can work differently in different browsers, and even between different versions of the same browser.

FIELD VALIDATION

If the information being submitted in the field must be validated (such as verifying that a phone number is in the form XXX-YYY-ZZZZ), this must be performed in the code of the SecureForm. Data validation is not performed by DataMotion after the submission. If field validation is required on the SecureForm, you must create the validation code and implement it within the SecureForm, most likely with JavaScript.

GUIDELINES

The form should contain the following form fields:

- txtto – the message address that will be receiving the form. If the customer requires the recipient of the secure form to change based on the URL used to access the form, the txtTo field can be replaced with a procedure: DataMotion will configure the recipient domain for the customer's Corporate License. The URL that the customer uses to point to the Secure Form can specify the recipient's prefix via the "to=" query string value. For example, if the server is configured with the domain @customer.org, the recipient of the secure form will be user@customer.org when the URL is:
  - For ***DataMotion Direct*** customers: https://ssl.dmhisp.com/form.aspx?co=100&frm=TestForm&to=User
  - For ***DataMotion SecureMail*** customers: https://ssl.datamotion.com/form.aspx?co=100&frm=TestForm&to=User
- txtsubject – the subject line of the message when the form is submitted
- txtDone – the name of the page that will be displayed after the form is posted to the DataMotion Portal -- i.e. "done" would display "done.html" when the message is successfully posted. This custom page is supplied by the customer as well; otherwise a generic "Message Sent Successfully" page is displayed.

All other form fields are placed in the body of the DataMotion message using field name and value pairs. To exclude a field from the message body, it should start with a double underscore "__". This is useful for input buttons, etc. that you do not want to be included in the message body.

ACCESSING SECUREFORM DATA

Once a form has been created, the data can be accessed two ways:

- **Manual Process** – all form data is delivered in a message and with attachments containing the form data in CSV or XML format.
- **Data Adapter** – an automated tool that will receive the form data from the specified DataMotion Direct account where it can then be integrated into workflows.

* * *

This concludes the *DataMotion Direct Administration Guide*.