DataMotion SecureMail
User Guide

October 9, 2020
Part # 050006–08

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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 8

This version has been updated to include the new compose interface for the web portal. The following sections have been updated.

- **Chapter 1) DataMotion SecureMail Web Portal**
  - » **Composing and Sending DataMotion SecureMail Messages**
    This section has been updated to show and document the new compose interface including the new file upload dialogs.

Version 7

This version has been updated show new screenshots for the updated user interface of the web portal.

Version 6

This version has been updated to include new features added to the login methods to the web portal.

- **Chapter 1) DataMotion SecureMail Web Portal**
  - » **Establish Your Account With A Unique Password** (on page 17)
    This new section covers establishing your account with a unique password.
  - » **Establish Your Account With Your Google Account** (on page 22)
    This new section covers establishing your account with your Gmail credentials.
  - » **Establish Your Account With Your Facebook Profile** (on page 25)
    This new section covers establishing your account with your Facebook credentials.
  - » **Establish Your Account With Your LinkedIn Profile** (on page 28)
    This new section covers establishing your account with your LinkedIn credentials.
  - » **Establish Your Account With Your Office 365 Account** (on page 31)
    This new section covers establishing your account with your Microsoft credentials.
  - » **Access Your Account Using a Username and Password** (on page 34)
    This new section covers accessing your account with your username and password.
  - » **Access Your Account Using Google** (on page 35)
    This new section covers accessing your account with your Gmail credentials.
  - » **Access Your Account Using Facebook** (on page 38)
    This new section covers accessing your account with your Facebook credentials.
  - » **Access Your Account Using LinkedIn** (on page 39)
    This new section covers accessing your account with your LinkedIn credentials.

» *Access Your Account Using Office 365* (*on page 41*)
This new section covers accessing your account with your Microsoft credentials.

» *Reply All Functionality* (*on page 108*)
This new section describes the reply functionality and format of addresses when responding to messages sent using Safe TLS.

Version 5

This version has been updated to include new features added to the overall Group Mailbox feature. This required a couple of new sections which are listed below.

n *Chapter 1) DataMotion SecureMail Web Portal*

» *Deleting Group Mailbox Messages as a Delegate* (*on page 68*)
This new section introduces the capability to delete a Group Mailbox message.

» *Moving Group Mailbox Messages as a Delegate* (*on page 69*)
This new section introduces the capability to move a Group Mailbox message.

Version 4

This version has been updated to include new features regarding the Group Mailbox settings. This required introducing new sections which are listed below.

n *Chapter 1) DataMotion SecureMail Web Portal*

» *Group Mailbox Configuration* (*on page 62*)
This new section introduces the Group Mailbox feature and describes how to configure the Group Mailbox.

» *Add Delegates* (*on page 63*)
Describes how to add delegates to your Group Mailbox.

» *Remove Delegates* (*on page 64*)
Describes how to remove delegates from the Group Mailbox.

» *Managing Group Mailbox Messages* (*on page 65*)
Provides details on how Group Inbox message retrieval works, and delegate privileges within the Group Mailbox.

» *Sending and Receiving Messages within the Group Mailbox* (*on page 67*)
Describes how message tracking functions for members of a Group Mailbox when intergroup communications are performed.

Version 3

This version has been updated to document the latest features in the web portal (v5.36). It also contains various other clarifications and improvements. The following lists the most significant changes:

n *Chapter 1) DataMotion SecureMail Web Portal*

» *Security and Privacy Considerations for Encrypted Messages* (on page 84)
This new section informs users that they should not enter sensitive information into the Subject line. This section also mentions that organizations should train users to not put any sensitive information into the Subject line to avoid its exposure.

» *Changing Your Account Preferences* (on page 57)
Added a new screenshot of the Account Preferences page showing the new Automatically add signature feature.

» *Using the Address Book* (on page 89)
Added a description of how to use the address book.

Version 2

This version contains new information and updated screenshots for mobile clients (tablets and smartphones) in the following chapters:

n *Chapter 3) DataMotion SecureMail for Tablets*

n *Chapter 4) DataMotion SecureMail for Smartphones*

Version 1

Initial version of this document.

About This Publication

ABOUT DATAMOTION SECUREMAIL

This publication describes how to use DataMotion® SecureMail.

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

DataMotion SecureMail protects sensitive messages with military-grade encryption, and it allows users to send secure messages and files using one click, with built-in tracking of all messages and files sent, received, and opened. DataMotion SecureMail stores the information with AES-256 Bit Encryption. It works with popular email clients such as Microsoft Outlook, as well as on the iPhone and other mobile devices, and it is intuitive for senders and recipients, so it can be up and running in minutes with no outside IT support. With integrated large file support, DataMotion SecureMail seamlessly delivers documents, images, and other large files, eliminating a significant bottleneck in data exchange.

Providing effortless secure sending from email clients and direct delivery to the recipient's inbox, plus the ability to transfer large files easily from desktop clients or mobile devices, DataMotion DataMotion SecureMail offers unsurpassed capability, flexibility, and user experience.

INTENDED AUDIENCE

This publication is primarily intended for users of DataMotion SecureMail, who are not expected to be security experts.

Technical documentation for engineers, developers, programmers, system administrators, and system and application integrators is also available from DataMotion. See *DataMotion Documentation* (on page 14).

OVERVIEW

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

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

DataMotion SecureMail Platform Block Diagram

DataMotion SecureMail

User Interface	DataMotion Platform	System Interface
Webmail Portal		**Management Console**
Mobile / Tablet — Desktop		Provisioning — Settings — Reporting
Provider Directory & Address Book		**Management APIs**
Email Client Integration		Provisioning — Settings — Reporting
Mobile / Tablet — Desktop Clients		**Data Transport**
File Transfer		Messaging APIs — File Transfer APIs — Protocols
Portal — Drag & Drop		Embedded Webmail Client with SSO
Inbound Contact		**Email Compliance Filter**
eForms — Messages		PHI, Lexicons, Pattern & Exact Matching

The left side of the diagram shows the **DataMotion SecureMail User Interface**. The User Interface has been designed for simplicity and ease so that end-users can accomplish the secure transport of email 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:

n   A Webmail Portal and Email Client Integration for sending and receiving secure messages

n   File Transfer for sending files securely (including large files), and

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

The *DataMotion SecureMail User Guide* contains instructions on using the Webmail Portal, Email Clients, and File Transfer. 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 SecureMail 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 SecureMail 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 SecureMail User Guide* provides detailed instructions for using the product. 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 SecureMail Web Portal
Describes how to establish, access, and use your Web Portal account, as well as how to send, receive, track, retract, and manage secure email messages.

Chapter 2) DataMotion SecureMail for Desktop Clients
Describes how to set up and use the DataMotion SecureMail add-in for desktop clients (e.g., Microsoft Outlook), including how to send secure messages from your email client using the SendSecure button.

Chapter 3) DataMotion SecureMail for Tablets
Provides step-by-step instructions on how to set up and use DataMotion SecureMail for tablets (e.g., iPad device), including how to receive and send secure messages from within the native mail application.

Chapter 4) DataMotion SecureMail for Smartphones
Provides step-by-step instructions on how to set up and use DataMotion SecureMail for smartphones (iPhone, Android devices, etc.), including how to receive and send secure messages from within the native mail application.

Chapter 5) SecureFileTransfer
Provides information on how to use your web browser to send, receive, and view files via the DataMotion SecureMail Web Portal, or alternatively, how to use an SFTP client that connects to the DataMotion SFTP server to upload and download files. Describes the tracking information and notifications that indicate when the files were securely delivered and received.

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- *DataMotion SecureMail Software Development Kit Technical Reference Manual* (part # 050002)
  Documents the Application Programming Interfaces (APIs), and system development, maintenance, and administration tools for developers.

- *DataMotion SecureMail Administration Guide* (part # 050007)
  Documents the system installation, maintenance, and administration tools for administrators and integrators.

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

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DataMotion SecureMail Web Portal

INTRODUCTION

DataMotion SecureMail is a simple yet powerful solution that secures sensitive email and file attachments from accidental exposure and data theft. At the same time, it ensures compliance, guards your reputation, builds customer trust, and reduces business process costs. And, the best part is that DataMotion SecureMail is incredibly simple to set up and easy to use.

DataMotion SecureMail makes sending encrypted email as simple as clicking a button and retrieving a secure email is just as easy. You can point the recipient to a URL to pick up their email, or send it as a PDF file right to their inbox.

DataMotion SecureMail tracks and documents all of your secure email and file deliveries. You receive confirmation that your email was opened, along with a link to more detailed data that captures the exact date and time that files were received and accessed. You'll know for sure that the information was delivered securely and when it was received and opened.

DataMotion SecureMail works the way you do, which means that you can send secure email whether you are in the office or on the move. DataMotion SecureMail is fully integrated with existing mobile devices email clients making it convenient and incredibly easy to use.

DataMotion SecureMail comes with SecureContact.me. This feature allows anyone to send a secure message to you, anytime, even if you have not sent a message to them. By adding a simple URL to your email signature or business card, you can let someone send you secure messages directly into your DataMotion account.

The purpose of this information is to describe the Web Portal services included with your DataMotion SecureMail user account.

To simplify locating information and answering questions about functionality, each section is focused on a specific task or type of information.

It is helpful if the reader is familiar with navigating the Internet with a web browser such as Internet Explorer, Chrome, Firefox, Safari, or Opera.

ADDITIONAL INFORMATION

Information about using DataMotion SecureMail with Microsoft Office Outlook can be found in Chapter 2, "*DataMotion SecureMail for Desktop Clients*."

EXAMPLES

For easier reading with examples, a fictitious company called Galactic Seats is used for reference.

GETTING STARTED

ESTABLISHING A DATAMOTION SECUREMAIL ACCOUNT

The first step to using DataMotion SecureMail secure messaging is to establish your account . When your account is created, an email notification will be sent to the email address associated with your DataMotion SecureMail account. The email contains instructions on how to access your DataMotion SecureMail account. When you click on the link in the email, it will take you to your account on the DataMotion SecureMail web portal so you can complete the setup process.

DataMotion SecureMail Account Registration Notification Inbox x

delivery@datamotion.com
to me

Your system administrator has created a secure e-mail account for you at:

https://securemailbeta.datamotion.com/r.aspx?b=8&e=bsmith34123%40gmail%2Ecom&p=8Z8L

To access your account, simply follow these steps:

1. Click on the above link.
2. Create a password and verify it to protect your account.
3. Access your account to send and receive secure e-mail messages.

If you need help, please send an e-mail to support@datamotion.com.

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The URL shown in the message will take you to the DataMotion Portal where you will be prompted to select a method of account activation.

The steps required for completing each method are unique and are discussed in the following sections.

NOTE: Even if you choose one of the options below during this phase, you can always select a different method in the future so long as the email address associated with your SecureMail account is the same as the email associated with your social media account.

NOTE: Only the Establish Your Account With A Unique Password option will work in the cases where the DataMotion SecureMail for Microsoft Outlook Plugin, API, or Adapter is utilized.
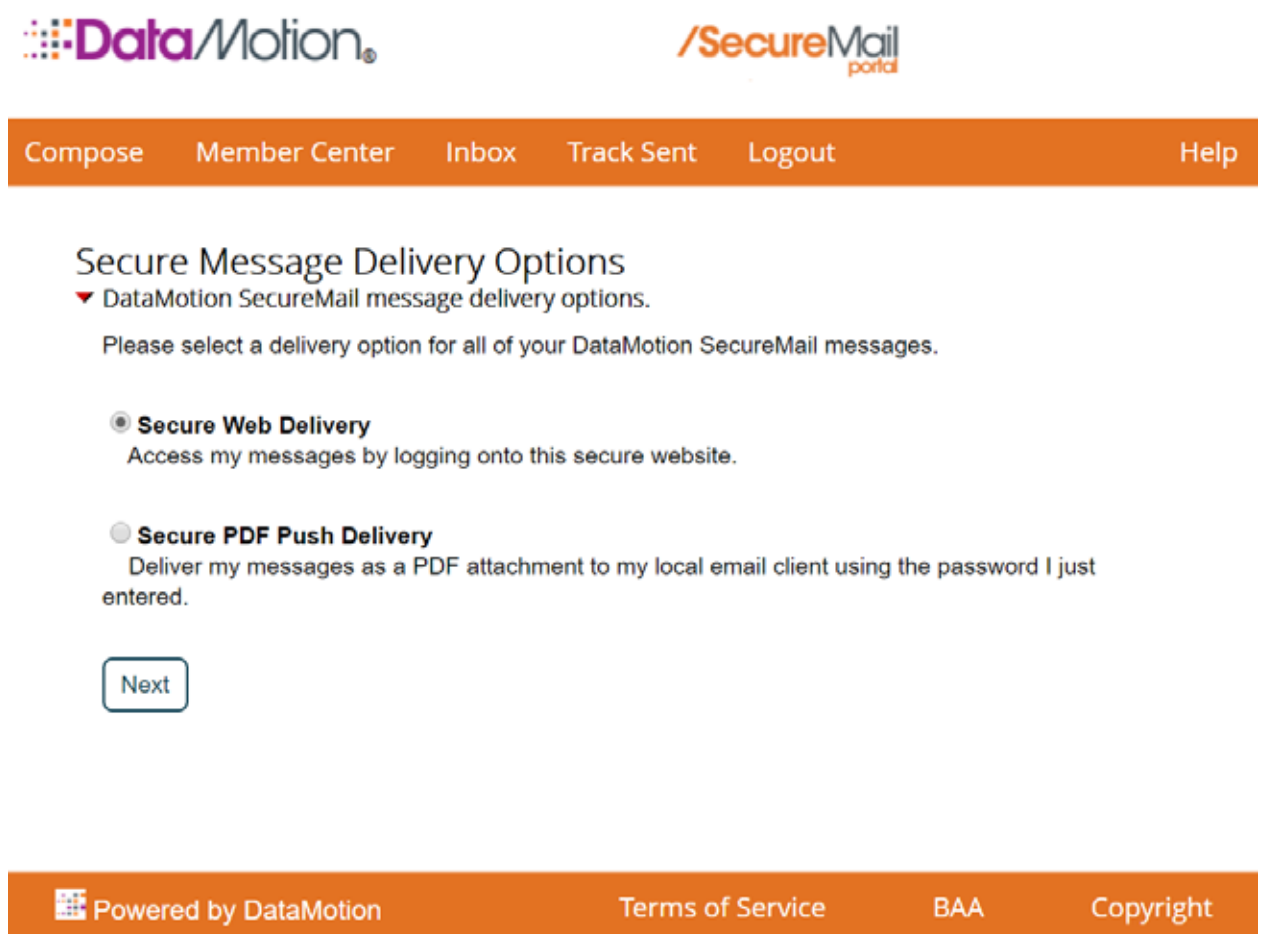
Establish Your Account With A Unique Password

Creating a unique password is the traditional method of establishing your account. This method is the first one presented and can be started by clicking the Create a Password button.

To complete this process, follow the steps below:

1. You may be prompted to choose your delivery type, as shown in the following screen.

   NOTE: Your administrator may have already set your delivery type. In that case you will not see this page.

2. If you choose Secure PDF Push Delivery you will receive your secure messages as PDF attachments directly to your email client. Select a delivery method and click **Next**.

3. Click the Create a Password button.

4. In the **Create a Password** fields, enter the password you want to use to access your account and click *Next*. Make note of your password for future logins.

Select and Answer 1 Security Questions

Please choose questions and enter answers that are easy to remember. Use one-word answers when possible. All fields are required.

Security question: What is your mother's maiden name?   ▼

Your Answer: [   ]

Re-Enter your answer: [   ]

[Continue]

1. Select the question you want to answer from the **Security question** dropdown list.

2. Enter your answer in the **Your Answer** and **Re-Enter your answer** fields. The answers must match.

Select and Answer 1 Security Questions

Please choose questions and enter answers that are easy to remember. Use one-word answers when possible. All fields are required.

Security question: What is your mother's maiden name?   ▼

Your Answer: name

Re-Enter your answer: name

[Continue]

3. Click Continue.

Select and Answer 1 Security Questions

Please choose questions and enter answers that are easy to remember. Use one-word answers when possible. All fields are required.

Security question:	What is your mother's maiden name? ▼
Your Answer:	name
Re-Enter your answer:	name

[Continue]

4. Verify the answers are correct. Click **Save**.

If multiple questions are shown on the page, each question must be answered like the single question in this example.

NOTE: If you must answer multiple questions, each question you answer must be unique.

Establish Your Account With Your Google Account

You can use your Google Account to establish credentials for your DataMotion SecureMail account. The Google Account you select must match the email address where you receive your account registration notification.

NOTE: Your email address must be provided by Google. Either an @gmail.com email or a Google Apps email domain are the only types of addresses that will work with this account activation method.

To complete this process, follow the steps below:

1. You may be prompted to choose your delivery type, as shown in the following screen.

NOTE: Your administrator may have already set your delivery type. In that case you will not see this page.

2. If you choose Secure PDF Push Delivery you will receive your secure messages as PDF attachments directly to your email client. Select a delivery method and click **Next**.

3. Click the Continue with Google button.

Account Activation

Your SecureMail account can be activated in one of the following ways:

Create a Password

Or, if bsmith34123@gmail.com matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

G   Login with Google   f   Login with Facebook   in   Login with LinkedIn   Login with Office 365

▼ Configure my language settings

Auto-Detect Language   ▼
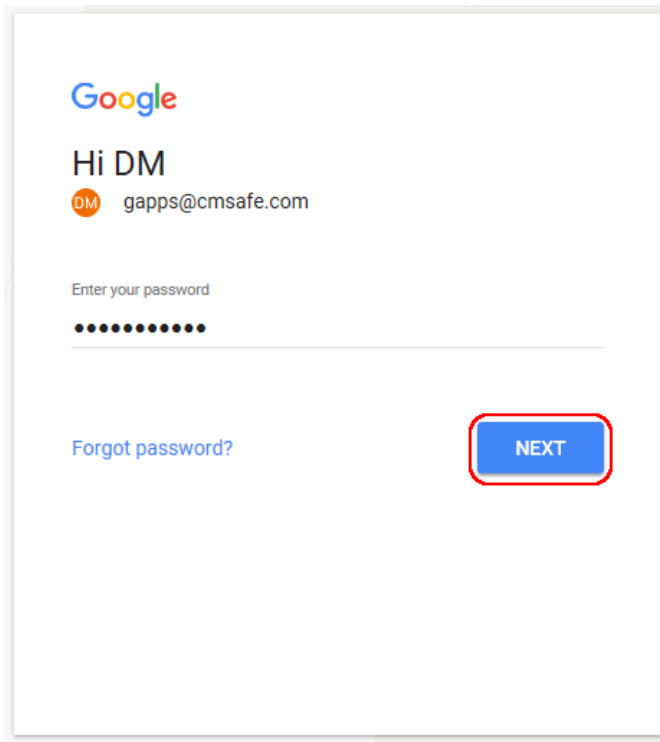
☐   I have read and agree to the following Terms of Service

4.   You will be re-directed to Google to select your account.

Google

Choose an account
to continue to datamotion.com

C   Community Based Organization
     dh.communitybased.organization@gmail.com
     Signed out

DM   DM Secure
      gapps@cmsafe.com
      Signed out

●   Use another account

5.   Enter the password for your Google account.

6. Click Next.

The activation is now complete and you are logged in.

Establish Your Account With Your Facebook Profile

Your Facebook profile can be used to establish credentials to your DataMotion SecureMail account. When you link your Facebook profile you must ensure that the email linked to your Facebook profile is the same as the one where you received your registration e-mail.

To complete this process, follow the steps below:

1. You may be prompted to choose your delivery type, as shown in the following screen.

NOTE: Your administrator may have already set your delivery type. In that case you will not see this page.

2. If you choose Secure PDF Push Delivery you will receive your secure messages as PDF attachments directly to your email client. Select a delivery method and click **Next**.

3. Click the Continue with Facebook button.

Account Activation

Your SecureMail account can be activated in one of the following ways:

Create a Password

Or, if bsmith34123@gmail.com matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

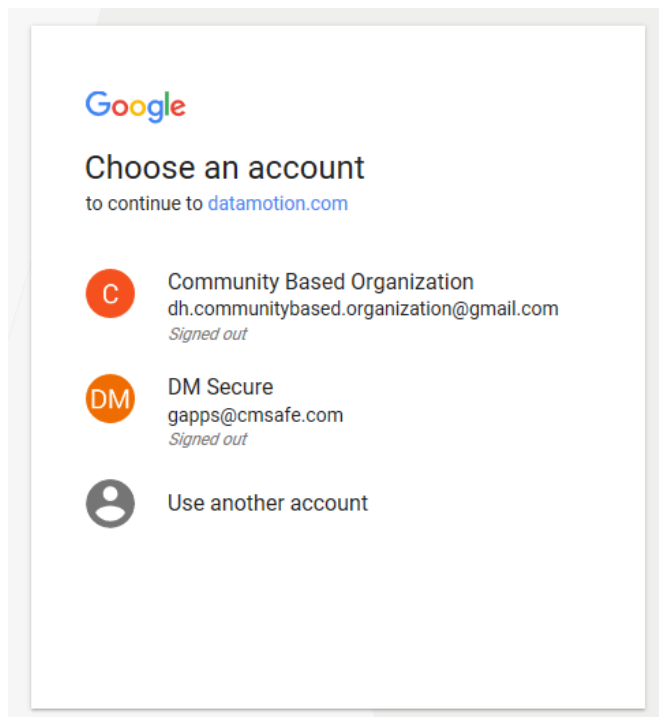| G Login with Google | f Login with Facebook | in Login with LinkedIn | Login with Office 365 |

▼ Configure my language settings

Auto-Detect Language ▼

.

☐ I have read and agree to the following Terms of Service

4. Enter your email and password.

5. Click Log In.

Log into Facebook

bsmith34123@gmail.com

••••••••

Log In

or

Create New Account

Forgot account?
Not now

6. Click the Continue as (your username) button.

The activation is now complete and you are logged in.

Establish Your Account With Your LinkedIn Profile

Your LinkedIn profile can be used to establish credentials to your DataMotion SecureMail account. When you link your LinkedIn profile you must ensure that the email linked to your LinkedIn profile is the same as the one where you received your registration e-mail.

To complete this process, follow the steps below:

1. You may be prompted to choose your delivery type, as shown in the following screen.

NOTE: Your administrator may have already set your delivery type. In that case you will not see this page.

2. If you choose Secure PDF Push Delivery you will receive your secure messages as PDF attachments directly to your email client. Select a delivery method and click **Next**.

3. Click the Continue with LinkedIn button.

Account Activation

Your SecureMail account can be activated in one of the following ways:

Create a Password

Or, if bsmith34123@gmail.com matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

| G Login with Google | f Login with Facebook | in Login with LinkedIn | Login with Office 365 |

▼ Configure my language settings

Auto-Detect Language ▼

.

☐   I have read and agree to the following Terms of Service

4.   Enter your email address and password.

5.   Click Sign In.

Linked in.

linkedin@gmail.com

••••••••

Cancel   Sign In

6.   Click the Allow button.

The activation is now complete and you are logged in.

Establish Your Account With Your Office 365 Account

You can use your Office 365 account to establish credentials for your DataMotion SecureMail account. Your Office 365 email address must match the email address where you received your account registration notification.

To complete this process, follow the steps below:

1. You may be prompted to choose your delivery type, as shown in the following screen.

NOTE: Your administrator may have already set your delivery type. In that case you will not see this page.

2. If you choose Secure PDF Push Delivery you will receive your secure messages as PDF attachments directly to your email client. Select a delivery method and click **Next**.

3. Click the Continue with Office 365 button.

Account Activation

Your SecureMail account can be activated in one of the following ways:

[Create a Password]

Or, if bsmith34123@gmail.com matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

[G Login with Google]   [f Login with Facebook]   [in Login with LinkedIn]   [⊞ Login with Office 365]

▼ Configure my language settings

[Auto-Detect Language   ▼]

.

☐   I have read and agree to the following Terms of Service

4. Click on your account.

Microsoft

Pick an account

🪪   user@office365.com   ⋮

＋   Use another account
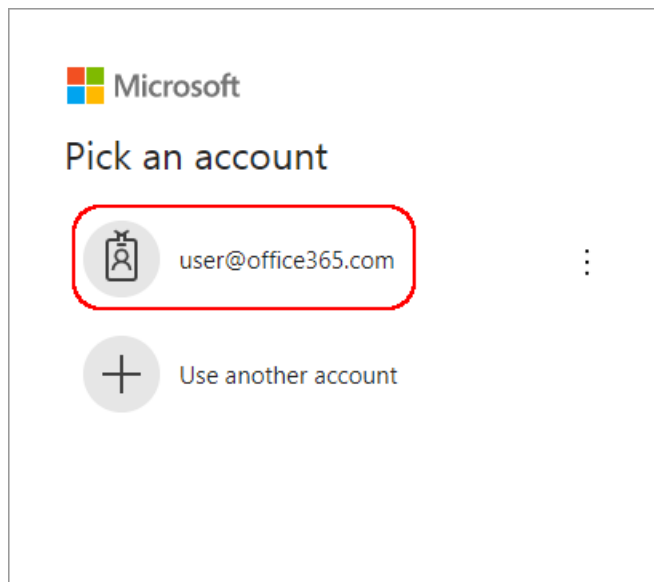
5. Enter your email address (if it is not entered already) and your password.

6. Click Sign in.

Office365

Sign in with your organizational account

| user@office365.com |
| •••••••• |

Sign in
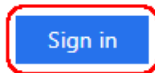
The activation is now complete and you are logged in.

ACCESSING THE DATAMOTION PORTAL

ACCESSING YOUR ACCOUNT

The DataMotion Portal is a website where you can send, receive and track your secure messages. Access to this Portal requires Internet access and a web browser. All major browsers are supported. Please reference the latest release notes for more information.

NOTE: So long as the email address linked to your social media account is the same as the email address where you received your account registration notification, you can select any of the options below.

NOTE: If you change the email linked to your Facebook or LinkedIn profiles, you will no longer be able to select those options.

Access Your Account Using a Username and Password

This method of accessing your DataMotion SecureMail account requires you to have created a unique password during the Establishing a DataMotion SecureMail Account step, or through one of the methods listed in the Creating

Perform the following steps to login to the portal:

1. Use the web browser to navigate to the DataMotion Portal site: https://ssl.datamotion.com.

NOTE: Your organization may provide a customized URL to use instead of **https://ssl.datamotion.com**.

2. Enter your email address and password in the login window.

3. Click Enter to login.
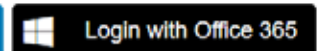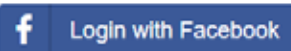
You can check the **Remember UserID** box to have the email address (or UserID) saved for the next time you access the Portal.

For information about setting a UserID to be used for your login instead of your email address, see *Changing Your User Information* (on page 54).

NOTE: For convenience, a link to the DataMotion login window is provided in all DataMotion Delivery Notification messages.

Access Your Account Using Google

This method of accessing your DataMotion SecureMail account requires you to have received your account registration notification at a valid Gmail or Google Apps email address.

Perform the following steps to login to the portal:

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1. Use the web browser to navigate to the DataMotion Portal site:
https://ssl.datamotion.com.

NOTE: Your organization may provide a customized URL to use instead of
https://ssl.datamotion.com.

2. Click the Login with Google button.

Login

Upon successful login, you may access your account to send and track your messages.

UserID or Email Address:

▼ Configure my language settings.

Auto-Detect Language ▼

Password:

☐ Remember UserID

Login

Click HERE to reset your password

Or, if your SecureMail email address matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

G Login with Google   f Login with Facebook   in Login with LinkedIn   ⊞ Login with Office 365

Security Status: Login is secured by an encrypted link (SSL) to our server.

NOTE: If you are already logged into your Google account in the browser, the above step will complete the login process.

3. Select your Google account.
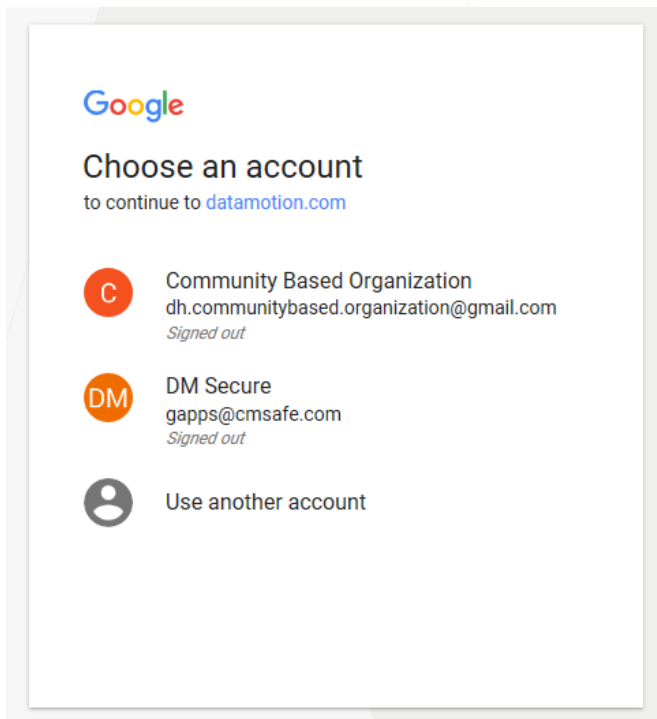
4.   Enter the password for your Gmail account.
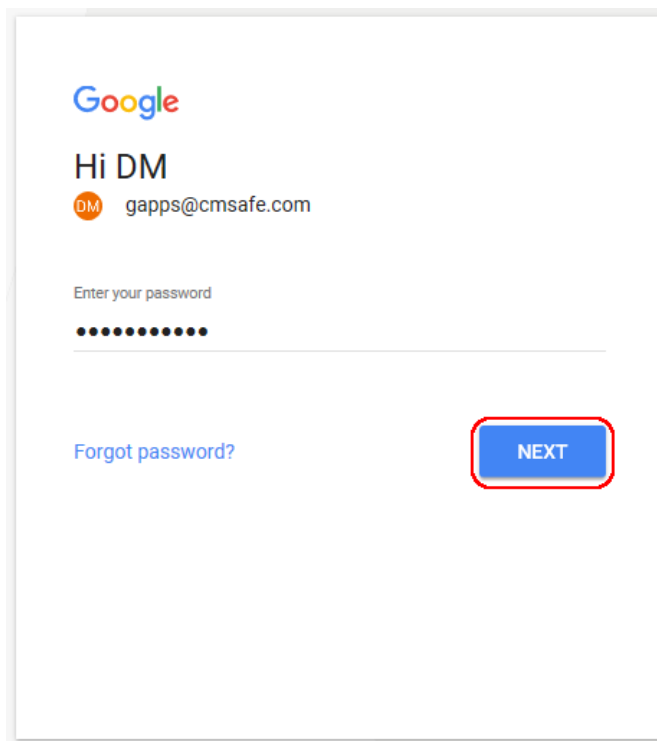
5.   Click Next.

Once this process is complete you will be signed into the SecureMail portal.

Access Your Account Using Facebook

If your Facebook account uses the same email address where you received your account registration notification, you may access your account via the Login with Facebook button.

Perform the following steps to login to the portal:

1. Use the web browser to navigate to the DataMotion Portal site: https://ssl.datamotion.com.

   NOTE: Your organization may provide a customized URL to use instead of **https://ssl.datamotion.com**.

2. Click the Login with Facebook button.

Login

Upon successful login, you may access your account to send and track your messages.

UserID or Email Address:

▼ Configure my language settings.

Auto-Detect Language   ▼

Password:

☐ Remember UserID

Login

Click HERE to reset your password

Or, if your SecureMail email address matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

G Login with Google   f Login with Facebook   in Login with LinkedIn   Login with Office 365

Security Status: Login is secured by an encrypted link (SSL) to our server.

3. You will be re-directed to Facebook to provide credentials if you are not logged in or granted access if your browser is already logged into Facebook.

Access Your Account Using LinkedIn

If your Facebook account uses the same email address where you received your account registration notification, you may access your account via the Login with Facebook button.

Perform the following steps to login to the portal:

1. Use the web browser to navigate to the DataMotion Portal site: https://ssl.datamotion.com.

NOTE: Your organization may provide a customized URL to use instead of https://ssl.datamotion.com.

2. Click the Login with LinkedIn button.

3. You will be re-directed to LinkedIn to provide credentials if you are not logged in or granted access if your browser is already logged into LinkedIn.

Access Your Account Using Office 365

This method of accessing your DataMotion SecureMail account requires you to have received your account registration notification at a valid email address that is registered with Microsoft Office.

Perform the following steps to login to the portal:

1. Use the web browser to navigate to the DataMotion Portal site: https://ssl.datamotion.com.

NOTE: Your organization may provide a customized URL to use instead of https://ssl.datamotion.com.

2. Click the Login with Office 365 button.

Login

Upon successful login, you may access your account to send and track your messages.

UserID or Email Address:

Password:

▼ Configure my language settings.

Auto-Detect Language ▼

☐ Remember UserID

Login

Click HERE to reset your password

Or, if your SecureMail email address matches the address you use for any of the following services, login to that service to quickly access your SecureMail account.

G Login with Google   f Login with Facebook   in Login with LinkedIn   ⊞ Login with Office 365

Security Status: Login is secured by an encrypted link (SSL) to our server.

3. Select your Microsoft account.
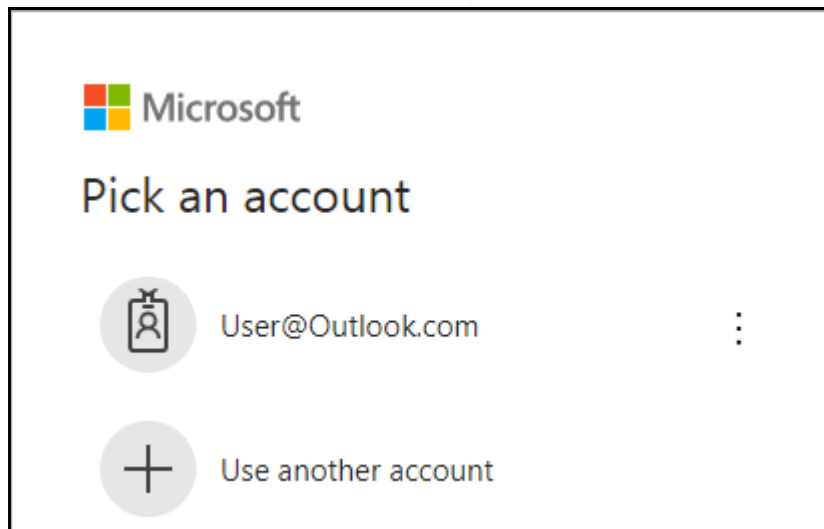
4. Enter your credentials.

5. Click the Sign in button.

You will be logged into your account upon completion.

CREATING A UNIQUE PASSWORD

If you did not establish a unique password during the Establishing a DataMotion SecureMail Account section, it is still possible to setup a unique password to login with. This can be accomplished by either performing a password reset (see the Password Reset Using Email (Default) section) or by going to User Information in the Member Center and creating a password.

/SecureMail

User Guide   v8

The method to use the User Information section of the Member Center is discussed below:

1. Sign into your SecureMail account.
2. Navigate to the Member Center if not there already.
3. Click the User Information link.
4. Click the Create Password link.

User Information

User ID:	
First Name:	
Last Name:	
Email Address:	bsmith34123@gmail.com

Password Management: Create Password

☐ Opt In to receive relevant information, notices and offers

Save   Close

5. A notification will be sent to your email address.
6. Click on the notification in your inbox.
7. Enter a New Password.

Account Activation

Simply create a password to protect your account.

▼ Create a Password

New Password: [   ]

Verify New Password: [   ]

Score: [0%]

Complexity: Very Weak

Password Requirements

- Minimum 8 characters in length.
- Must contain 3 of the following items:
    - Uppercase Letters
    - Lowercase Letters
    - Numbers
    - Symbols

▼ Configure my language settings

[Auto-Detect Language ▼]

[ ] I have read and agree to the following Terms of Service

[Next]

8. Click Next

You will be logged into your account upon completion.

FORGOTTEN PASSWORD RESET

Below the login box is a link to reset your password. Click this link to reset your password. If your organization uses Security Question validation, and you answered a Security Question when you registered your DataMotion SecureMail account, you will be able to enter the new password after you enter the answer to the Security Question. Otherwise, you will receive an email message sent to the email address associated with your DataMotion SecureMail account. When you click the link in the email, it will take you to the portal and allow you to reset your password. This is the method by default (that is, if no Security Questions are used).

Password Reset Using Email (Default)

To reset your password:

1. Click **HERE** in "Not sure what your password is? Click HERE to reset your password."

2. Enter your email address for this account.

3. You will see a confirmation that the process has started.

4. You will receive an email notification instructing you to click a link.

DataMotion Forgot Password Notification Inbox x

delivery@datamotion.com   6:33 PM (6 minutes ago)
to me

DataMotion Forgot Password Notification

You have selected the Forgot Password link, indicating that you would like to assign a new password to your secure e-mail message account.

To complete this process, simply click on the following link:

https://ssl.datamotion.com/r.aspx?b=4&e=jsmith%40yourorg%2Ecom&p=21J4&l=en-us

After clicking this link you will be prompted to enter a new password and verify it. If you would rather keep your current password, simply ignore this email.

If you need help, please send an e-mail to support@datamotion.com.

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5. Input your new password, which must be a unique password you have never used to access the web portal before.

6. Click the Access Your Account button.

Change Account Password

▼ Change Password

New Password: ••••••••••••

Verify New Password: ••••••••••••

Score: 100%

Complexity: Very Strong

Password Requirements

- Minimum 8 characters in length.
- Must contain 3 of the following items:
    - Uppercase Letters
    - Lowercase Letters
    - Numbers
    - Symbols

Back   Access Your Account

Password Reset Using Security Questions (Optional)

To reset your password:

1. Click **HERE** in "Not sure what your password is? Click HERE to reset your password."

2.   Enter your email address for this account. Click **Enter** to load your question choices.

Forgot your password?

▼ Email Address

    [ismith@yourorg.com]   [Enter]

Please Answer Security Question(s)

Password Security Question   **Provide an Answer**

[What is your mother's maiden name?   ▾]   [   ]   Please answer the question.

[Validate Answers]

3.   Select one of your questions and enter the answer in the **Provide an Answer** field.

4.   Repeat for the number of fields you have displayed. Each Security Question must have an answer to proceed.

Forgot your password?

▼ Email Address

    [ismith@yourorg.com]   [Enter]

Please Answer Security Question(s)

Password Security Question   **Provide an Answer**

[What is your mother's maiden name?   ▾]   [   ]   Please answer the question.

[Validate Answers]

5.   Click **Validate Answers** to confirm your identity.

6. Enter and confirm your new password.

7. Click Access Your Account to login.

NOTE: If you are unable to successfully answer the Security Questions after three attempts the system will initiate a password by Email.

DATAMOTION PORTAL OVERVIEW

MEMBER CENTER

Once you have logged into your DataMotion SecureMail account, you will be shown the Member Center. The Member Center is the central location for your account. From here you can get to all the functionality of your account. The main sections provide links to different aspects of your account, and the bottom displays a summary of some account details.
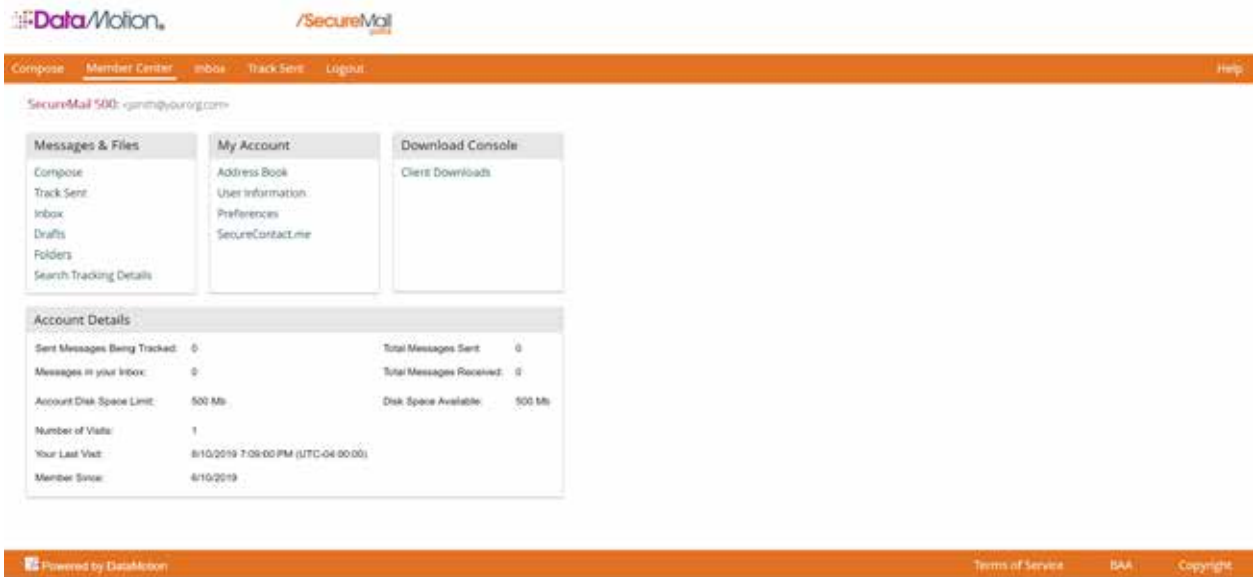
NOTE: If you have new, unread messages, you will be taken directly to your Inbox instead of the Member Center.

Messages & Files

This section provides access to message-related functionality. The options are:

Link	Description
Compose	Opens the Compose new message window so you can create and send a new secure message and/or file attachment.
Track Sent	Opens the Track Sent folder where you can see all the messages and files you have sent and review their tracking information.
Inbox	Opens the Inbox for secure messages you have received.
Group Inboxes	Accesses the Group Mailbox of any user that you are assigned as a delegate.
Drafts	Opens the Drafts folder for messages you have started but did not yet send.
Folders	Opens the folder management window where you can create and manage subfolders which you can use to manage your messages.
Search Tracking Details	Searches for a specific message's tracking details based off of the Message ID that you enter into the text field. Note that the Message ID must be known beforehand.

My Account

This section provides access to account settings and an address book. The options are:

Link	Description
Address Book	Opens your address book where you can manage contacts stored in your account.
User Information	Displays the User Information screen where you can manage your account name and password settings.
Preferences	Provides access to settings related to how you send and receive secure messages. Opens the Account Preferences window where you can manage account settings related to how you send and receive secure messages.
Group Mailbox Configuration	Accesses the Group Mailbox where you can add or remove delegates.
SecureContact.me	Generates your SecureContact.me link and explains how to use this feature. With SecureContact.me anyone can send you a new secure message.

Download Console: Client Downloads

The Download Console contains a Client Downloads link. This allows you access to optional client application software that provides DataMotion SecureMail functions from your computer desktop. For example, you could download the DataMotion SecureMail for Microsoft Outlook* add-in program to enable sending and receiving secure messages through Outlook.

NOTE: This link may not be available for all users. Contact your System Administrator if you do not see this link.

Download Console

Welcome to the Download Console. To download the installation file, select the appropriate version from the drop down list below and click Download Now! When the download completes, click on the installer file to run the installation.

PRODUCT INFORMATION:

SecureMail v5.x supports Microsoft Office Outlook versions **2010***, **2013**, **2016** and **2019/Office 365**.
* Outlook 2010 lifecycle ends in October 2020 and updating to a newer version of Office Outlook should be considered

Most Outlook versions are 32-bit. 64-bit versions of SecureMail should only be used with 64-bit versions of Outlook. If you are not sure whether you have a 32-bit or 64-bit version of Outlook, see How to determine the Outlook version below for information about checking the version. Download the SecureMail version which matches the Outlook version.

[SecureMail for Outlook 32-bit v5.0 ▾]   [Download Now!]

IMPORTANT:

The download will be customized for admin@yourorg.com and will include your registration information. Do NOT share this download with other users! It is customized for your account and will only send mail from your email address.

You can use the drop-down list to see all available programs which you can download. Select one and click the **Download Now!** button to download the selected installation package to your computer.

NOTE: All DataMotion SecureMail for Outlook downloads are customized for each individual account. The DataMotion SecureMail package you download will not install correctly for any other email address or account.

Account Details

The Account Details area provides a snapshot of information about your account. You can see the number of messages sent and received, information about the amount of disk space available on your account and your login statistics.

MENU BAR

The menu bar provides quick access to common functions from all windows. The menu bar does not change as you move around the portal.

The following options are available on the menu bar:

Menu	Description
Compose	Opens the New Message window to send a new secure message or file.
Member Center	Takes you back to the Member Center
Inbox	Opens the Inbox for secure messages and files you have received.
Track Sent	Opens the Track Sent folder where you can see all the messages and files you have sent and review their tracking information.
Logout	Ends the current portal session. After you click this, you will need to login again to access the portal.

CHANGING YOUR USER INFORMATION

You are able to edit your account information. To edit your information:

1. Go to the Member Center.
2. Under the **My Account** section, click **User Information**.

This will open the **User Information** page.

User Information

User ID:

First Name:

Last Name:

Email Address: jsmith@yourorg.com

Password Management: Change Password

☐ Opt In to receive relevant information, notices and offers

Save   Close

Understanding Your User Information Options

The following table explains the information which can be configured.

Option	Description
Login ID	You can choose a username to utilize for authentication to the Web Portal. If you enter a Login ID here you can login with **either** your email address or your ID. The username you select must be unique.

Option	Description
First & Last Name	You can enter your name. It will be used in notification messages sent to you.
Email Address	Your email address (It may not be possible to edit the email address if your company does not permit this feature. Should this be the case, whomever your system administrator is will have to be contacted)
Password Management	Clicking the Change Password link will show you a page where you can change your password. You will need to enter your existing password first.
Opt In to receive relevant information, notices and offers	If you check this box DataMotion will send you offers and notices about DataMotion products. DataMotion will never sell or provide your account information to any other organization.

CHANGING YOUR ACCOUNT PREFERENCES

DataMotion SecureMail gives you the ability to configure how you can receive secure messages sent to you, as well as how the messages are sent to your recipients. To configure your preferences:

1. Go to the Member Center.
2. Under the *My Account* section, click Preferences.
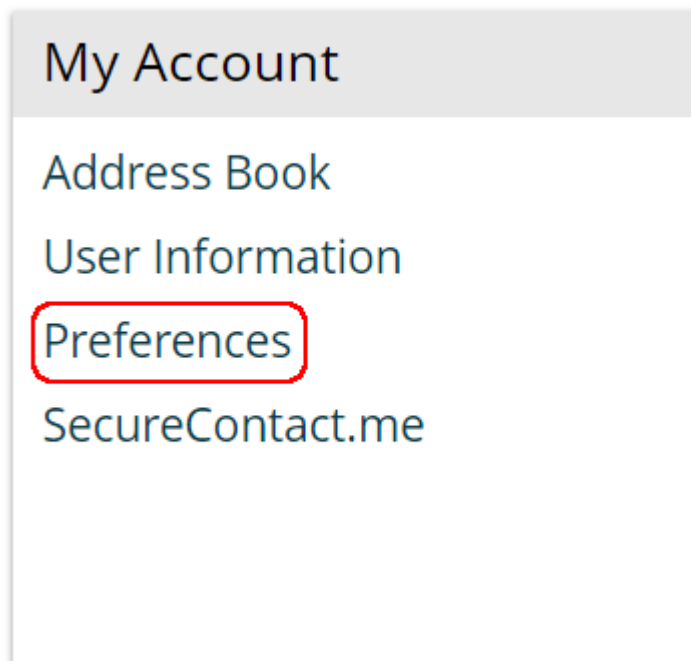
This displays the **Account Preferences** page.

Account Preferences

Message priority: ○ Low ● Normal ○ High

Receive e-mail receipts: ● Yes ○ No

Use Rich Text Box Editor: ○ Yes ○ No ● Use Default

Read Confirmation: ○ Yes ● No

Message expiration: [1 Month   ▼]

Email format: ○ HTML ○ Text ● Use Default

Signature: [   ]

Automatically add signature: ○ Yes ● No

SecureMail Delivery Type: ● Use Default
                                     ○ Web
                                     ○ PDF

Date Time Format: [M/d/yyyy 12:00:00 AM/PM   ▼]

Time Zone: [(UTC-04:00:00) Eastern Time (US & Canada)   ▼]

[Save] [Close] [Defaults]

Understanding Your Account Preference Options

In most instances, the default values do not need to be changed as they are the most common settings for our customers. The following table provides a description of the options.

Option	Description
Message Priority	Set the priority of your messages to low, normal, or high. The default value is **Normal**.
Receive email receipts	Arrange to receive an automated notice alerting you whenever a recipient opens one of your messages. The default value is **Yes**.
Use Rich Text Box Editor	Turn on or off the ability to format your message fonts, add color to fonts and backgrounds, and create lists. The default value is **Use Default**. This option is usually set to use Rich Text. In some cases, this option may not be provided depending upon your company settings. Also, the rich-text editor is provided only in supported browsers; otherwise, plain text is used.
Read Confirmation	Force your recipients to log onto the web portal to read and respond to their secure messages. Selecting **No** gives your recipients the ability to read and respond to your messages from within their own desktop email applications. Only Licensed users have the ability to open up messages from their email client. Recipient-level users can ONLY open their messages from the web interface. The default value is **No**.
Message expiration	Instruct the DataMotion system to delete your message when it reaches its expiration date. Click the drop-down arrow to select a value. You can opt to have your message deleted after as little as one day or as long as two years. Recipient-level users do not have the option to increase the expiration date, but they do have the ability to LOWER the expiration date to as little as 1 day. The MAXIMUM expiration is set to 1 month for recipient-level users. The default value is **1 month**.
Email format	Allows you to set the email format between HTML or Text for messages that you receive. If you select **Text**, you will not be able to see any graphics or other special HTML formatting in the messages you receive. The default value is **Use Default**. This option is controlled by your company settings (usually HTML).
Signature	Append a signature to the end of your messages. Simply enter your desired signature in the text entry box.

Option	Description
Automatically add signature	Select Yes to automatically apply your signature in the message body of all messages in Compose. If you select No, you can still manually add your signature to messages by clicking the "Add Signature" button in Compose. The default is No.
SecureMail Delivery Type	When this choice is enabled, you can choose to receive your messages either via the Web or in a discrete password-protected PDF file sent directly to your Inbox. Selecting **Web** means they will be viewable over the Web; selecting **PDF** means they will arrive as discrete PDF documents, and the password will be your account password. The default value is **Use Default**. This option is controlled by your company settings (usually Web).
Date Time Format	Configure the preferred date/time format (e.g., 24-hour time or am/pm time) you will see in your message headers. The default value is **M/d/yyyy 12:00:00 AM/PM**.
Time Zone	Use the drop-down field to select the time zone for your account. The time zone is reflected anywhere the time is displayed, including when viewing Inbox or Track Sent messages and in Notification messages. The default value is **(GMT-5:00) Eastern Time (US & Canada)**. NOTE: The time zones in the drop-down follow the same order of your computer's time zone list. Due to this, the order may not be the same on every device.

When you're done modifying your preferences, click **Save**.

NOTE: If you choose to receive your messages as password-protected PDF files, you will receive an automated message with the PDF as an attachment directly to your Inbox.

SECURECONTACT.ME

SecureContact.me is a feature where someone can send you a new secure message, not just a reply to one. This feature is only available for paid accounts, but provides a simple method for someone to send you new messages that are not replies to previous ones. Clicking this link shows you how to use SecureContact.me.

SecureContact.me

SecureContact.me provides a simple way for someone to send you a secure message. Simply follow the instructions below to add this capability to your signature in your standard email client.

For more information, go to SecureContact.me.

To add SecureContact.me to your email signature, follow these steps:

1. Copy the following personalized hyperlink to your clipboard:

Send me a secure message

2. From your email client (e.g. Outlook, Gmail, etc), edit your email signature and paste the copied line in the appropriate location. For example:

John Doe
Auditor
(cell) +1 (234) 567-8901
(fax) +1 (234) 567-8902
Send me a secure message

If copying the above hyperlink does not work for you, your direct SecureContact.me URL is:

https://securecontact.me/jsmith@yourorg.com

GROUP MAILBOX CONFIGURATION

Your DataMotion SecureMail group mailbox configuration provides the ability to delegate other users (which must be within your company) to access and respond to messages on your behalf. This allows you to grant access to your inbox to trusted persons who can read, respond to, and download messages for you without the need for you to give them your account password. Delegates can also view and download attachments. They are not granted permission to access the contacts in your address book, delete your messages, or send entirely new messages on your behalf. Delegates must have a SecureMail account within your company, and any messages they send on your behalf will be shown as being sent from their account. After you add delegates, the delegates can manage your inbox messages according to the instructions in *Managing Group Mailbox Messages* on page 65.

To configure your Group Mailbox:

1. Go to the Member Center.
2. Under the *My Account* section, click **Group Mailbox Configuration**.
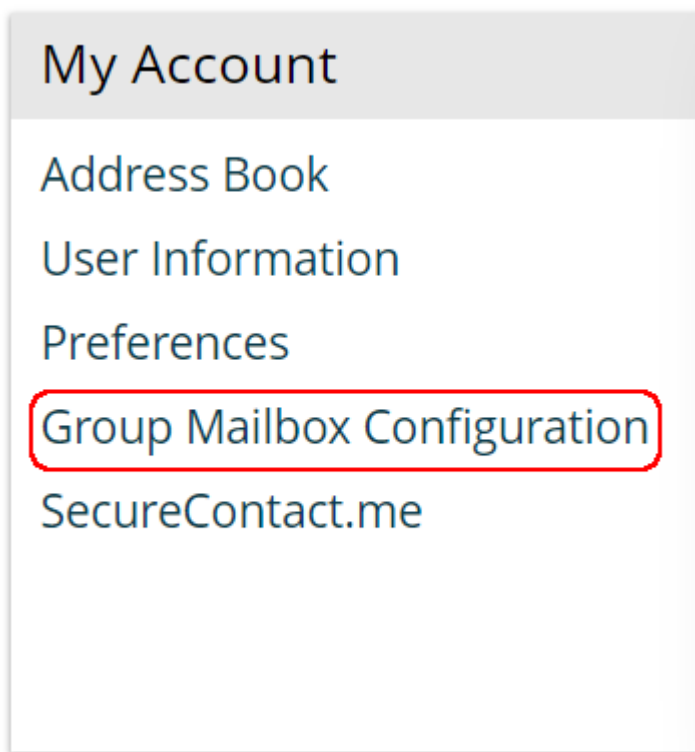
This displays the configuration page where you can specify delegates who will be allowed to access messages in your inbox.

Group Inbox Configuration

The following people will have permission to view messages in your inbox.

Delegate Address ∠

Add

You have not given any users access to your messages.

This window will display users who already have access to your messages and allows you to delegate more.

ADD DELEGATES

To add delegates, type the desired email address (from your company) into the Delegate Address field and click the **Add** button. As long as the user exists within your company you will see the address listed below the entry field.

Group Inbox Configuration

The following people will have permission to view messages in your inbox.

The group inbox operation completed successfully.

Delegate Address ∠

Add

admin@yourorg.com

Delete

REMOVE DELEGATES

To remove delegates, find the desired email you would like to remove and click the **Delete** button next to the address. If there were no problems, you will see the user removed on the resulting screen.

Group Inbox Configuration

The following people will have permission to view messages in your inbox.

The group inbox operation completed successfully.
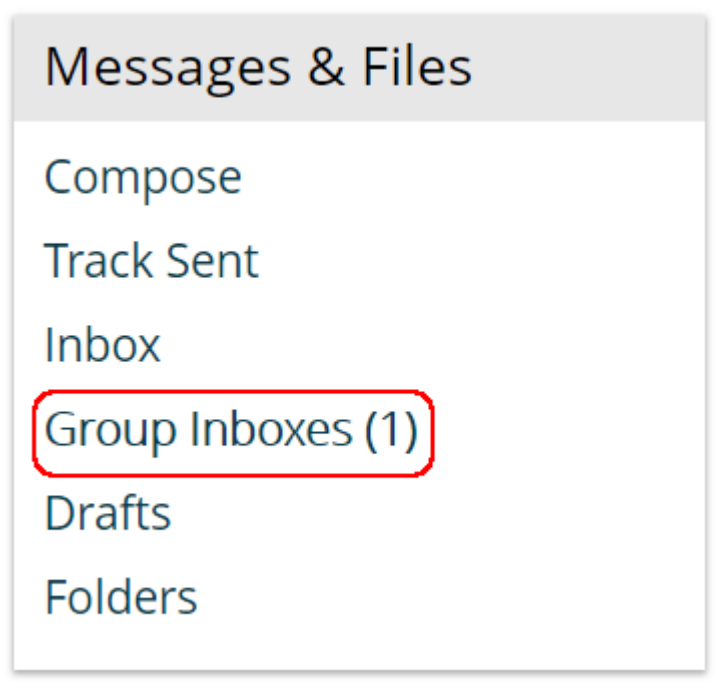
Delegate Address

Add

admin@yourorg.com

Delete

MANAGING GROUP MAILBOX MESSAGES VIA GROUP INBOXES

A Group Mailbox is configured by the account owner, who has the power to assign delegates. (See *Group Mailbox Configuration* on page 62 for information on configuring the group mailbox delegates.) Delegates are granted account privileges to access the owner's Group Mailbox via the Group Inboxes link, where they can view and respond to the owner's messages. You will only ever see messages in Group Inboxes if you are delegate of a Group Mailbox. Group Mailbox owners will still access messages via the regular Inbox link.

A Group Mailbox Delegate can manage group messages as follows:

1. Navigate to the **Member Center**.
2. Under **Messages & Files** click **Group Inboxes.**

3. On the resulting window, you will see all group messages contained within the Group Mailbox that you are a delegate of. Should there be more than a single email address in the To field, it means you are a delegate of multiple Group Mailboxes. You can distinguish between these by using the "To" field, which you can sort by.

Group Inbox

	ID ▽	Date	From	To	Subject	Size
NEW ☐	44136649	6/10/2019	jsmith@yourorg.com	jsmith@yourorg.com	Test	48

Delete   Copy To Folder... ▾   Page Size: 10 ▾

Delete   Copy To Folder... ▾

SENDING AND RECEIVING MESSAGES WITHIN THE GROUP MAILBOX

Within the Group Mailbox environment itself, sending messages to other members of the Group Mailbox will cause a notification to be sent each member of the group. Also depending on the number of delegates within the group, replies made by delegates will appear in the Track Sent information as Delegate: underneath the To: field.

Clicking Expand All Tracking Details will show the Opened tracking details. See below:

View Message Collapse All Tracking Details

Tracking:	#49545976
Sent:	10/8/2020 2:20:57 PM (UTC-04:00:00)
Expires:	11/8/2020 2:20:57 PM (UTC-04:00:00)
From:	admin@yourorg.com
Subject:	Test

To:	✉ admin@yourorg.com	Opened 10/8/2020 2:22:15 PM (UTC-04:00:00).
Delegate:	✉ delegate1@yourorg.com	Opened 10/8/2020 2:22:43 PM (UTC-04:00:00).
	✉ delegate2@yourorg.com	Notification message sent. Message not opened.

Test

✔ Security Envelope:	Message Integrity
✔ Server Encryption:	Message is protected with strong encryption.
✔ Secure Session:	Securely view and download this message.

NOTE: At this time if the first person to open the message is a delegate and not the Group Mailbox owner, the Opened time will be the same for the delegate and the Group Mailbox owner.

DELETING GROUP MAILBOX MESSAGES AS A DELEGATE

Deleting a Group Mailbox message is primarily a utility feature for delegates to clear out messages in the stead of the owner. All delegates will be granted this capability upon being added to a Group Mailbox so keep this in mind when adding delegates in general. The process to delete a message from a Group Mailbox is shown below:

1. As a delegate click the Group Inboxes link on the Member Center.

Messages & Files

Compose

Track Sent

Inbox

Group Inboxes (1)

Drafts

Folders

2. Find the message you want to delete and click the checkbox next to it.
3. Finally click the Delete button and it will be deleted.

Group Inbox

		ID	Date	From	To	Subject	Size
NEW	☐	44136649	6/10/2019	jsmith@yourorg.com	jsmith@yourorg.com	Test	48

Delete | Copy To Folder... ▾   Page Size: 10 ▾
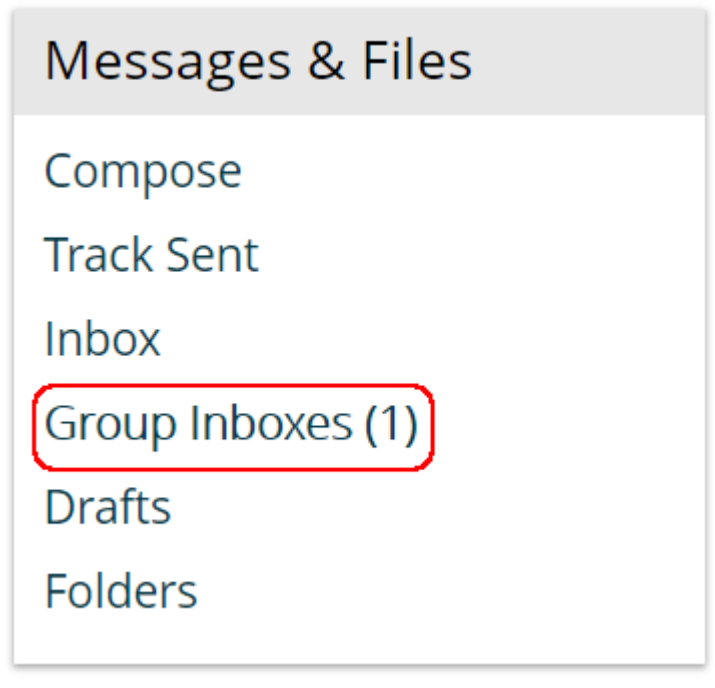
Delete | Copy To Folder... ▾

MOVING GROUP MAILBOX MESSAGES AS A DELEGATE

The capability to move a Group Mailbox message is primarily in place for delegates to take from a Group Mailbox to respond on their own if need be. This feature can also act as an archive in the event that it is necessary to retain messages in multiple locations or accounts. The process to move a Group Mailbox message is shown below:

NOTE: Moving a message is not a transfer of ownership i.e. the delegate will not become the Group Mailbox owner of moved messages, nor will the delegate
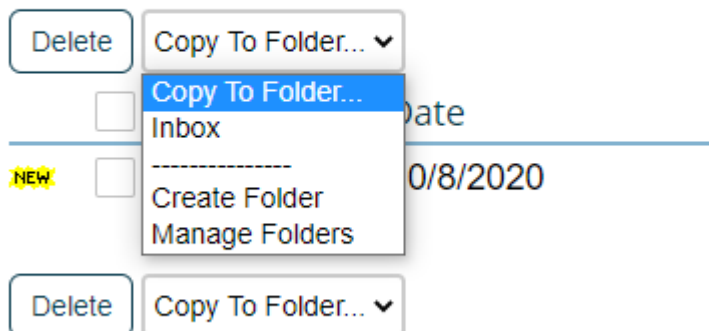
become the From address until the initial sender responds to a reply the delegate sends.

1. As a delegate click the Group Inboxes link on the Member Center.

Messages & Files

Compose

Track Sent

Inbox

Group Inboxes (1)

Drafts

Folders

2. Find the message you want to move and click the checkbox to the message.
3. Select the Copy to Folder… drop-down and select the folder you want to move the message to.

Group Inbox

Delete   Copy To Folder... ∨

Copy To Folder...
Inbox Date

Create Folder 0/8/2020
Manage Folders

NEW

Delete   Copy To Folder... ∨

NAVIGATING AND MANAGING YOUR MESSAGES
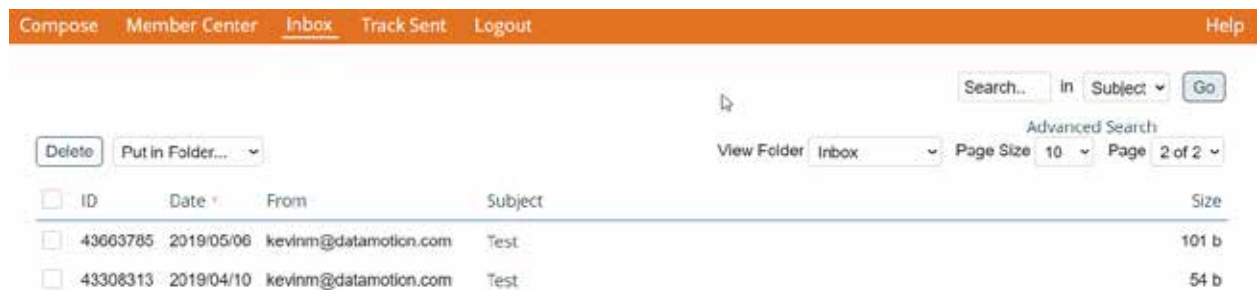
GENERAL NAVIGATION

The message windows (sending and receiving) provide a common set of navigation functions, including searching, sorting and message management.

NOTE: The search looks only for exact matches within the selected column. If you enter a text string that matches only part of the field, it will not return any message results. However, you can use the % symbol as a wildcard to match zero or more characters. This allows you to find messages using a partial match followed by the wildcard. For example, to find all messages with a subject that starts with "new", enter new% as the search string.

The messages in your message Inbox (which contains received messages), message Outbox (which contains copies of sent messages, also called Track Sent), and the messages in their subfolders are displayed and managed through a common user interface called the Message Folder window. The message folder window provides a set of navigation functions, including searching and sorting, as well as tools for organizing and managing messages.

Customizing the Message Folder Window

The message folder window provides several ways to customize the display of messages

Sorting Your Messages

By default, messages are displayed sorted from the newest to the oldest. It is possible for messages to be sorted by any column shown (ID, Date, From, Subject or Size), in ascending or descending order. This can be done by clicking on the column header you want to sort on.

The first click will sort all the messages in ascending order based on the information in that column. A second click will sort in descending order for that column.

NOTE: The default sorting order is by Date in descending order. Whenever you navigate to a new message folder, such as when switching to the Member Center, or creating a new message, and then you return to the Inbox, the sorting order is initially set to use Date descending order.

Changing the Page Size

The Page Size field specifies how many messages should be displayed at one time. The default is to show 10 messages.

When there are more messages than can be displayed on a single page, a new dropdown will be shown with the number of pages. This dropdown can be used to quickly jump between pages of messages.

The Page Size setting is a persistent setting and will be remembered even between logins.

Searching Messages

There is a simple search and an advanced search function for your messages.

Simple Search

The simple Search function at the top right of the message folder window searches only the current folder for the text pattern that you enter. It searches for this pattern within the **Subject**, **ID**, **From**, or **Date** field (column) that you select from the drop-down list.
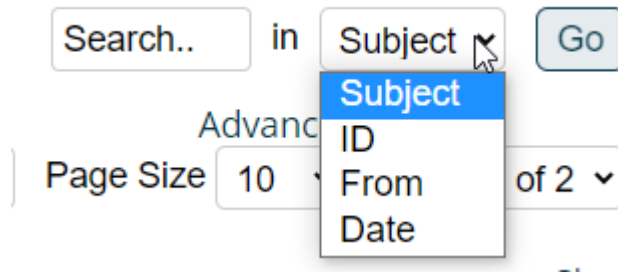
NOTE: The search looks only for exact matches within the selected column. If you enter a text string that matches only part of the field, it will not return any message results. However, you can use the % symbol as a wildcard to match zero or more characters. This allows you to find messages using a partial match followed by the wildcard. For example, to find all messages with a subject that starts with "new", enter new% as the search string.

To perform a simple search:

1. Enter a string into the **Search** box

2. Select where the string should be found

3. Click **Go**

All messages with a match will be shown. To clear the simple search filter you can either click the Back button on your browser or open the folder again.

Advanced Search

Additional search options are available by choosing the Advanced Search link.

Advanced Search

Advanced Search allows you to search your entire Inbox or Track Sent using multiple search characteristics. For wildcard searches, use the "%" character. To quickly select a date, click the calender icon. Click "Search" to view your Inbox or Outbox.

Search in:	Inbox
Folder Name:	All Folders
Tracking ID:	
Start Date:	
End Date:	
Subject:	
From Email:	
Sort By:	Date ☐ Reverse Order

Search   Clear Form

Within the Advanced Search you have the ability to fine tune your search results over a wider range of options. You only need to fill in the fields you need; any left blank will not be used as search parameters.

The following table describes the search fields.

Search Fields	Description
Search In	Selections are Inbox or Track Sent.
Folder Name	Select the folder to search using the drop-down list. The drop-down list shows only the subfolders for the selected folder type. You can choose to search either All Folders (which is the default option), a selected subfolder, or you can exclude Subfolders and just search the main Inbox or Track Sent folder.
Tracking ID	The ID numbers assigned to each message
Start Date	The earliest date to search
End Date	The latest date to search

Search Fields	Description
Subject	The Subject line of messages must match the text that you enter here. The Search is case-insensitive and will locate the text you enter regardless. You can use wild cards to match the text. The asterisk (*) or percent sign (%) can be used to match any number of preceding or following characters. For example, "* Plan" will match messages with a subject of "2015 Planning" and "Marketing Plan".
From/Recipient Email	The sender or recipient of the message (depends on whether you are searching the Inbox or Track Sent)
Sort By	The field which should be used to sort the results in ascending order (or descending if the Reverse Order is checked)

Clicking **Search** will display the results of the specified parameters. The **Clear Form** button will clear any entries on this page.

Once a search has been performed, a new Search box will be displayed.

The following results have been filtered.
Modify Search | Clear Search

The **Modify Search** link will open the Advanced Search window with the current search parameters. **Clear Search** will clear the search parameters and reset the folder view.

Changing Folders

There are several ways to navigate to a new folder. For example the Inbox, Track Sent and Drafts folder links are available directly from the menu bar while the Inbox and Track Sent links are also available from the Member Center.

Another way to navigate folders is using the **View Folder** list.

The folders listed will be related to the main folder you are navigating within. For example, if you are viewing the Inbox, you will see folders that are listed under the Inbox, while if you are viewing Track Sent, you will see folders listed under Track Sent (the outbox). The All Folders option will show messages that are in all the folders listed in the View Folder drop-down list; that is, it will list messages for all the folders related to the main folder type, either the Inbox or Track Sent folder. Another convenient way to navigate to folders is using Manage Folders. When you select

Folders on the Member Center page, it takes you to the **Manage Folders** page, where you can click on any folder to navigate to it. The All Folders option will show all messages in all folders that are in the dropdown list.

Managing Messages

Each message line has a checkbox next to it. You can use this checkbox to select messages to delete or move to a new folder. Checking multiple messages will select them all for the action you specify.

Deleting Messages

To delete a message, check the box next to the message and then click **Delete**.

When you delete, a message it will move the message to the Trash folder. The message remains in the Trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be moved to the Deleted Trash folder. The message remains in the deleted trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be permanently deleted.

NOTE: If a message reaches the end of its expiration period, it will be moved to the Trash folder.

Moving Messages to Another Folder

To move a message to a new folder, check the box next to the message and select the appropriate folder from the "Put in Folder…" dropdown menu.

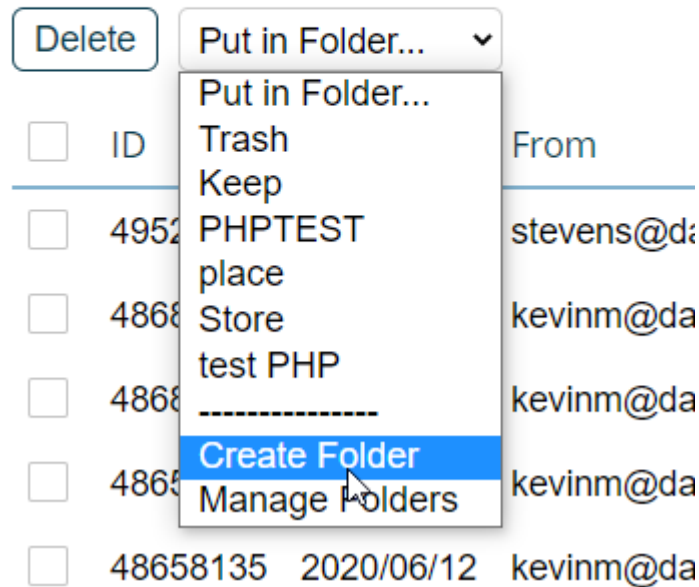This will move the checked messages into the selected folder.

MANAGING FOLDERS

To enable you to further organize your messages, you can create (and delete) folders in much the same way you would in your desktop applications, such as Microsoft Outlook or Lotus Notes. This function can be accessed from either a folder window or the Member Center.

Creating Folders from the Message Windows

To create a new folder, open your Inbox or Track Sent folder:

1. Click the **Put in Folder…** drop-down arrow.

2. Select **Create Folder** from the menu.

Compose　　Member Center　　Inbox

Delete　Put in Folder... ∨

Put in Folder...
Trash
Keep
PHPTEST
place
Store
test PHP

Create Folder
Manage Folders

ID		From
☐	4952	stevens@da
☐	4868	kevinm@da
☐	4868	kevinm@da
☐	4865	kevinm@da
☐	48658135 2020/06/12	kevinm@da

3. Enter the name of the new folder.

Add New Folder

New Folder Name: [　　　　　　　　　　　]

Folder Located Under: Inbox Folder ∨

Add Folder　Cancel

4. Click Add Folder.

This new folder is now added to your existing list of folders and will appear in the dropdown.

NOTE: The Folder Located Under will default to the folder you were viewing when you clicked the Create Folder item.

Manage Folders Window

The Manage Folders window provides a full list of all folders in your account.

The **Manage Folders** window can be accessed either by clicking the **Folders** link in the Member Center or the **Manage Folders** item in the **Put in Folder…** drop-down menu.

Built-in Folders: SecureMail contains built-in folders. The Inbox and Track Sent folders are the two main folder types. Each folder type has built-in folders under them including Trash and Deleted Trash. Built-in folders cannot be deleted or renamed. You cannot move messages from an Inbox folder type to a Track Sent folder type or the other way around.

All folders in your account are divided into two groups: Inbox folders and Track Sent (or outbox) folders. Messages that you have received are initially located in the Inbox and can only be moved to folders under the Inbox. Messages that you have sent are initially located in the Track Sent (or outbox) folder and can only be moved to folders under Track Sent. Draft messages are outbox messages and so are initially located in the Drafts folder under the Track Sent folder.

There are three actions available in the Manage Folders window: Rename, Delete, and New Folder. There are three actions available in the Manage Folders window: Rename, Delete, and New Folder. Rename and Delete do not apply to built-in folders and are only shown if you have already created at least one new folder.

Manage Folders

[Rename] [Delete] [New Folder]

Folder	Messages	Size
Inbox	🗑 1	1 Kb
Trash	0	<1 Kb
Deleted Trash	0	<1 Kb
☐ Test	0	<1 Kb
Track Sent	🗑 1	1 Kb
Drafts	0	<1 Kb
Trash	0	<1 Kb
Deleted Trash	0	<1 Kb
Archive	0	<1 Kb

Renaming a Folder

To rename a folder, you must first select a folder you have already created. Check the box next to the folder name and click **Rename**.

Rename Folder
Old Folder Name: Fuel Systems
New Folder Name:

[Rename Folder]   [Cancel]

Enter the new name for the folder and click **Rename Button**.

Deleting a Folder

To delete a folder, you must first select a folder you have already created. Check the box next to the folder name and click the **Delete Button**.

Click **OK** to delete the folder.

NOTE: When you delete a folder, the messages in that folder are not deleted; they are moved back into the top level folder (Inbox or Track Sent).

Creating a New Folder

To create a new folder, click the **New Folder** button and follow the steps in the *Creating Folders from the Message Windows* section.

SENDING AND RECEIVING SECURE MESSAGES

SENDING AND TRACKING MESSAGES

DataMotion SecureMail enables you to easily send messages and attachments in a highly secure fashion. It also provides a range of additional security options that traditional messaging applications do not offer. These additional security options include:

- Confirming that a message has been received
- Learning when a message has been opened
- Recalling unopened messages after they've been delivered
- Password-protecting individual messages.

COMPOSING AND SENDING DATAMOTION SECUREMAIL MESSAGES

You can send messages via the simple and intuitive DataMotion web interface or via the **Send Secure** button on your email client (such as Microsoft Outlook or Lotus Notes). For more information about sending messages through your email client, see *DataMotion SecureMail for Desktop Clients* (on page 111).

While messages can be sent securely by either method, the web client provides extra options related to your messages that are not available in your email client.

To send a secure message from the Web portal:

1. Open your web browser to the Web portal.
2. From the DataMotion Member Center, click either **Compose** (on the top menu bar) or click **Compose**, under Messages.
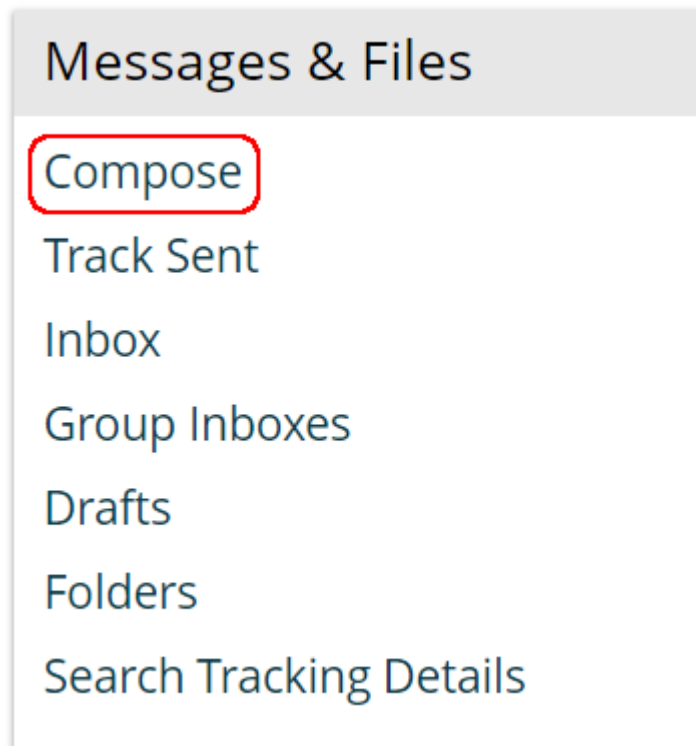
This displays the **Compose New Message** window.

3. Enter the email addresses for the recipients:

   » For multiple recipients, separate them with a comma and space (", ") .

   » Click the **Show CC** link to display the **Cc:** line for entering Copy To addresses.

   » Click the **Show BCC** link to display the **Bcc:** line for entering Blind Copy To addresses. (The **Show BCC link** is only available if you already clicked **Show CC**.)

   » You can also enter a user nickname tied to an email address in your address book or a group name from your address book. For details, see *Using the Address Book* on page 89.

4. Enter a **Subject** for the message. To ensure the Subject line does not expose sensitive or private information, you should review the information in *Security and Privacy Considerations for Encrypted Messages* (on page 84)

5. The **Attachments** area allows you to add attachments to your message.

   » The **Browse or Drop Files** button allows you to search for files to attach from your local computer or drop files into the page to add them to the message. You will get a progress bar that must complete in order for the file to be attached.

     – Please note that the icon for this button will change depending on the browser you are using.

> » You can remove any file that is attached by clicking the Trash Can icon (example below):

Test all caps.eml
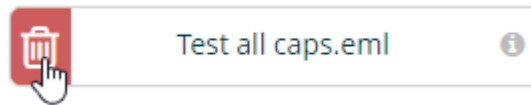
6. Create your message in the **Type your Secure Message** text area.

   NOTE: If you are using an outdated browser or non-supported browser (currently supported browsers are Internet Explorer 11, Microsoft Edge, Chrome, Firefox, and Safari) the file uploader and text area will be different than what is shown and may lack features.

7. Optionally, click **Add Signature** if you wish to append your signature at the end of your message.

   > » If you do not have a signature but wish to create one, you can create a signature by clicking **Member Center** and then clicking **Preferences**. See the *Changing Your Account Preferences* section of this guide about creating a signature.

8. Click **Send Secure** to send the message.

Your recipients will receive an automated DataMotion Message Delivery Notification (MDN) alerting them that you have sent them a secure message. See the *Receiving Messages* section of this guide for more information about receiving DataMotion SecureMail messages.

SENDING MESSAGES USING SAFE TLS

If your company has been configured to use Safe TLS the traditional flow of sending a secure email does not differ at all from the information described in the Sending and Tracking Messages and Composing and Sending DataMotion SecureMail Messages sections. There are significant differences to how messages are received by both existing users and any recipients of messages sent using Safe TLS. The information regarding these differences is contained in the *Receiving and Replying to Messages sent via Safe TLS* section *on page 108*.

Security and Privacy Considerations for Encrypted Messages

With DataMotion SecureMail, the security, privacy, and confidentiality of the email contents (that is, the message body and all attachments) are protected by encryption that allows only the sender and recipients to access the contents.

DataMotion emails adhere to the standard Internet protocol for secure messaging, called S/MIME or Secure MIME. With this standard, the secure content in the message consists of the message body and attachments, which are encrypted. The message body is the message text that you enter and send to recipients, and the attachments are any files that you include to send with the message.

The optional Subject line of the message is part of the email header information and is not protected by encryption. If you include sensitive, confidential, or private information in the Subject line of secure emails, it is like placing it on the outside of an envelope sent through traditional mail, which can be viewed by anyone who sees the envelope. The header information is not encrypted because it is used to control the message and its transmission. Besides the optional Subject line, the header information contains the sender and recipient addresses and other metadata, such as routing/tracking information.

Organizations should train their users to understand and follow practices that protect private or sensitive information when using secure encrypted emails. Users should learn how to protect information by using the message body and attachments and not including anything sensitive in the Subject line. All users should be aware that when they include a Subject line with the message, it is like writing a note on the outside of an envelope so that anyone could see it. To prevent the exposure of sensitive or private information in the Subject line, the recommendation is to have a blank or non-descriptive subject.

Users should also be aware of other privacy and security considerations. For example, in some cases, private information may be conveyed by the fact that the sender is engaging in a conversation with the recipient, such as when a medical specialist is sending a message to a patient. Also, senders must accurately enter correct addresses for their recipients to ensure the content is sent to the correct destinations.

SAVING AND RESUMING DRAFT MESSAGES

DataMotion SecureMail enables you to securely save drafts of messages, so later you can recall and complete them.

1. To save a draft copy of your message, click the **Save Draft** button at any point while composing your message. This places a copy in the Track Sent Drafts folder.

   NOTE: The system will automatically save a draft of your message periodically while you are still composing the message if the Compose window has been left open for 5 minutes or more.

2. To resume editing a message draft, navigate to the Track Sent **Drafts** folder. You can then select the draft message you want to open by clicking the Subject link of the message.

When you send the message, the draft copy will be automatically deleted. (If multiple drafts were saved, only the currently open draft will be deleted when you send the message.)

APPLYING ADDITIONAL LAYERS OF MESSAGE SECURITY

When you use DataMotion SecureMail web portal there are a number of additional security options which can be set on the message. These are only available when sending a message through the portal and cannot be accessed through any desktop email client.

The following table explains the options available.

Security Option	Description
Priority	Sets the priority of the message for the recipient. The default is Normal.
Receipt	Specifies whether you want to receive a notification message when the message is opened by or securely delivered to the recipient. The default is checked to receive a notification.
Expiration	Allows you to change the expiration time of the message. After this time has passed the message will no longer be available to be read. The expiration can be set for as little as 1 day to as long as 2 years. The default is 1 Month.
File in Folder	Allows you to automatically place the sent message in a different folder. The default is Track Sent.
Password Protect	Allows you to require the user to enter a separate password to open the message. The password will be case insensitive. You can specify a password hint along with the password field. This password is in addition to the password they must enter to login to the website. The default is to not specify an additional password.
Restrictions	These options allow you to restrict the ability to reply to or forward the message. Reply and Forward are individually restricted so you can allow reply (so they can answer you) but prevent forward (so they cannot pass the message on). The default is to allow reply and forward for the recipient.

To apply additional security to your message:

1. Compose your message.
2. At the bottom of the message window, click **Show Options**.
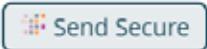
This displays the **Options** box, similar to the following.

3. Select the desired option(s).

4. Click **Send Secure** to send your message.

   NOTE: In your Account Preferences you can set default values for message priority, expiration date, and return receipts that will apply to every message you send out. The options here are only set for the individual message being sent and will override the settings in your Account Preferences.

USING THE ADDRESS BOOK

The address book gives you the capabilities to effectively manage email addresses for your recipients. Recipient e-mail addresses can be maintained as individual address book entries ("users"), or you can create address book groups containing many e-mail addresses. Group names can be added to your recipient list when you Compose a message. User nicknames can also be used in the recipient list in place of the email address.

The address book can be accessed from the Member Center, or from the Address Book button on the Compose page.

When working with the address book, you can select between the user and group views. Each of these address book views have a number of features that differ based on what view you have chosen.

Adding Users and Groups

The first time that you navigate to the Address Book page, the address book will be empty, with no users or groups. To fully utilize all that the Address Book has to offer, a few tasks must be performed first. The following procedures show how to enter a user address and assign it to a group for the first time, but you can follow the same basic procedures for additional ones.

Adding a User

1. From the Address Book (Select Users) page, click the Add/Manage Users button.

Address Book (Select Users)

Switch to Group View   Unfiled ▾

To	Cc	Bcc	Nickname	Email Address	Name

Add / Manage Users   Add Selected to Message   Cancel

2. On this page click the Add User link.

Address Book (Manage Users)

Switch to Group View   Unfiled ▾

Nickname   **Email Address**   **Name**

Select Users   Delete

Add User   Bulk Import   Cancel

3. Enter an Email Address (required). You may also enter a Nickname, First Name, and Last Name if desired.

Address Book: Add Individual

Nickname:

First Name:

Last Name:

Email Address: admin@yourorg.com

Save   Cancel

4. Click the Save button to add the user to your Address Book.

5. Click the Exit button to return to the page you started on.

6. The result would appear as follows.

Address Book (Select Users)

Switch to Group View

To	Cc	Bcc	Nickname	Email Address	Name
☐	☐	☐		admin@yourorg.com	

Unfiled ▾

Add / Manage Users   Add Selected to Message   Cancel

Adding a Group

1. From the Address Book (Select Users) page, first click the Add/Manage Users button.

Address Book (Select Users)

Switch to Group View

To	Cc	Bcc	Nickname	Email Address	Name

Unfiled ▾

Add / Manage Users   Add Selected to Message   Cancel

2. Click the Switch to Group View link.

Address Book (Manage Users)

Switch to Group View

Unfiled ▾

Nickname	Email Address	Name
☐	admin@yourorg.com	

Select Users   Delete

Add User   Bulk Import   Cancel

3. Click the Add Group link.

Address Book (Manage Users)

Switch to User View

Group Name

Select Groups   Delete

Add Group   Bulk Import   Cancel

4. On this page enter a name for the group in the Group Name field.

Address Book: Add Group

Group Name: Admin

Save   Cancel

5. Click the Save button to add the group to your Address Book.

6. Click the Exit button to return to the previous screen.

7. The result would appear as follows.

Address Book (Manage Users)

Switch to User View

Group Name
☐ Admin

[Select Groups] [Delete]

[Add Group] [Bulk Import]   [Cancel]

Moving Users to a Group

1. From the Address Book (Manage Users) page, click the Switch to User View link.

Address Book (Manage Users)

Switch to User View

Group Name

Admin

Select Groups   Delete

Add Group   Bulk Import   Cancel

2. Select the checkbox of the user that you want to assign to a group.

Address Book (Manage Users)

Switch to Group View   Unfiled ▼

Nickname	Email Address	Name
☑	admin@yourorg.com	

Select Users   Delete   Add To: Admin ▼

Add User   Bulk Import   Cancel

3. Select the group in the drop-down next to the Add To button. (The first time you do this, the group you created will already be selected.) Click the Add To button.

Address Book (Manage Users)

Switch to Group View   [Unfiled ▼]

Nickname	Email Address	Name
☑	admin@yourorg.com	

[Select Users]   [Delete]   [Add To:]   [Admin ▾]
                                                [**Admin**]

[Add User]   [Bulk Import]   [Cancel]

4. To confirm that the user was added to the group, select the group name in the filter drop-down on the top right. This displays the users assigned to that group.

Address Book (Manage Users)

Switch to Group View   Admin ▼

	Nickname	Email Address	Name
☐		admin@yourorg.com	

[Select Users] [Remove] [Add To:] Admin ▼

[Add User] [Bulk Import]   [Cancel]

Selecting Users to Add to the To, Cc, or Bcc Fields

User View

This is the initial view that you will be placed in when you navigate to the address book page. This view allows you to place selected users into a message using checkboxes in the To, Cc, and Bcc columns. You can also filter the users using the drop-down box, which can show All Users, a specific group you have created, or Unfiled, which shows all users not assigned to a group. Unfiled is the default filter for every user added. You can also select the Add/Manage Users button which will take you to the Manage Users screen.

Selecting a User

The following procedure dictates how to select a user.

1. To select a user, use the filter drop-down box to select a group, All Users or leave it on the Unfiled setting.
   TIP: If you don't see any users listed, try selecting All Users in the drop-down filter box on the top right side.

2. Click the To, Cc, or Bcc checkboxes next to the desired users.

Address Book (Select Users)

Switch to Group View   All Users ▾

To	Cc	Bcc	Nickname	Email Address	Name
☑	☐	☐		admin@yourorg.com	

Add / Manage Users   Add Selected to Message   Cancel

3. Click the Add Selected to Message button to place the user(s) into a message.

Address Book (Select Users)

Switch to Group View   All Users ▾

To	Cc	Bcc	Nickname	Email Address	Name
☑	☐	☐		admin@yourorg.com	

Add / Manage Users   Add Selected to Message   Cancel

Group View

To display the Group View from the Address Book (Select Users) page, select "Switch to Group View." The Group View functions in a similar fashion to the User View, but you are instead adding entire groups to the To, Cc, or Bcc sections of an email.

Managing Users in the Address Book

User View

This page allows you to add users to groups by clicking the checkboxes to select users, selecting the group in the drop-down box on the bottom right, and clicking the Add To button. You can also **remove users from groups** by selecting their checkboxes and clicking the Remove button. Note that to see the Remove button you must first select the group in the filter drop-down which by default shows Unfiled users.

Deleting users from the address book is also possible here by clicking the user's corresponding checkbox and then clicking the Delete button. This page also allows you to **add users to the Address Book** using either the **Add User** link or the **Bulk Import** link. The **Bulk Import** link takes you to a page where you can enter a comma-space-separated list of email addresses that will be added to the address book when you click Save. The Select Users button on this screen only takes you back to the Select Users page.

Group View

The Group View has very similar functionality to the User View except that the actions will affect the group only. For example if you use the Delete button to **delete a group**, only the group itself will be deleted; all users that were contained in that group will become Unfiled again. To **add groups** click the Add Group link, and on the new page simply enter a name for the group and click the Save button. The Bulk Import link takes you to a page where you can enter a comma-space-separated list of email addresses that will be added to the address book when you click Save.

TRACKING SENT MESSAGES

In addition to viewing sent messages, DataMotion SecureMail enables you to find out precisely when your message was delivered and opened by its recipients, as well as when any of its attachments were opened.

To view the tracking information for a message:

1. Click Track Sent on the menu bar or in the Member Center. The Track Sent folder is displayed, similar to the following:

2.   Click the **Subject** of the message you wish to examine. The View Message window displays.

3.   The message tracking details can be seen below the Subject line in the Message Tracking Details section.

NOTE: If you do not see this information, click *Expand Tracking Details* below the subject line, or click *Expand All Tracking Details* at the top of the screen to display it.

4.   To view attachment tracking details, click on **Expand All Tracking Details** at the top of the screen to expand the attachment tracking (both sets of tracking details are highlighted in the following screen).

Clicking any of the **Collapse** links will hide the tracking information.

As you can see in the example, both recipients have read the message but only one has downloaded the attachment.

Tracking a Message Sent Using Safe TLS

The same tracking features that are available for standard messages where the recipient must use the web portal to retrieve them are **not available** for messages sent over Safe TLS.

RETRACTING A SENT MESSAGE

If you realize you sent out a message in error, or change your mind about its contents or who should have received it, you can retract the message. The recipient will see that the message was retracted when they attempt to open the message.

To retract an unopened message from in the Track Sent folder:

1. Select the checkbox next to the message you wish to retract.
2. Click **Retract**.
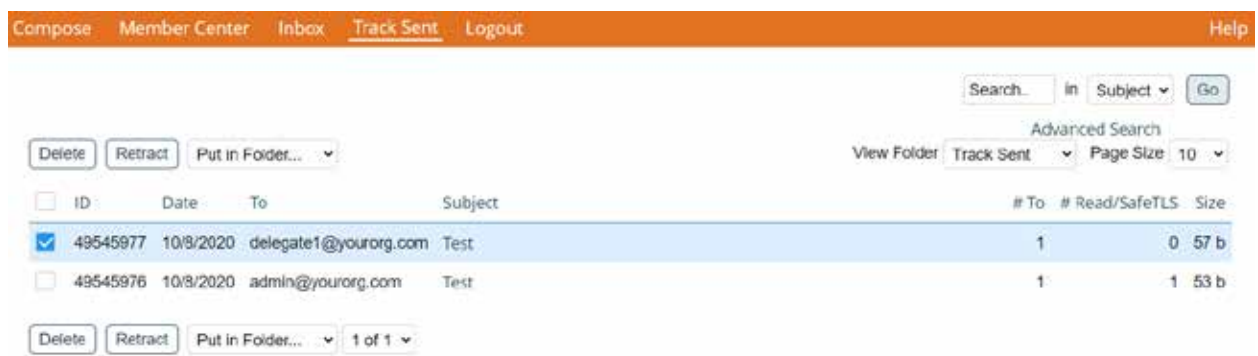
The message will remain in your **Track Sent** folder. It will now be listed as **Retracted**.

If you have sent a message to multiple recipients, you can retract the message from any group member.

TRACK SENT ADVANCED OPTIONS

The following table explains the Advanced Options available. When viewing a message in your Track Sent folder, advanced options related to the message can be accessed.

Option	Description
Message expires in	Allows you to change the expiration time of the message. If this is not changed before the message expires, the expiration time will not be able to be extended.
Password Protect this message	Adds a password to the specific message just as the Password Protect option does when sending the message.
Send another message waiting notification message to recipients that have not yet opened the is message	Checking this box will send a new notification message to any recipients who have not yet opened the message.
Retract message	This will retract a message for all recipients.

To access the Advanced Options, click the **Options** link while viewing a sent message.

Edit Message Properties

Message expires in: [1 Month ⌄]

☐   Password protect this message:

Hint: [   ] 📧

Password: [   ] ◉   Password Verify: [   ] ◉

☐   Send another message waiting notification message to recipients that have not yet opened this message.

☐   Retract message from recipients.

[Update Message]   [Cancel]

Make any adjustments or set actions on the message and click **Update Message**.

RECEIVING MESSAGES

When a new secure message is sent to you, there are multiple ways it may be delivered. By default it is delivered as a notification message with a link. It can also be delivered as a PDF attachment.

Notification Messages in Your Email Client

When you receive a new secure message a notification message will be sent to your email client. This message will appear to be from the sender of the secure message and have the same subject line of the original message. The message will contain some information about the sender and instructions to follow to read the message.

To read the message on the server, click the link on the second line. This will open your web browser to the login page.

DataMotion Message Delivery

jsmith@yourorg.com has created a secure e-mail message for you at:

https://ssl.datamotion.com/l.aspx?l=en-us

To access your message, simply follow these steps:

1. Click on the above link.
2. Type rjones@yourorg.com for your Login ID, and then your password.
3. Access your Inbox to view your message.

Problems accessing the message?

If you are unable to open the link, please make sure that your firewall or your company's security settings are not blocking the link.

If you are unsure of your password, please reset it at https://ssl.datamotion.com/ by clicking on the "Click HERE to reset your password" link.

Additional Help:

- Questions relating to the content of the e-mail should be directed to the sender or sending organization.
- Questions relating to reading this secure message can be sent to support@datamotion.com.

See *Accessing the DataMotion Portal* (on page 34) for information about logging into your account.

PDF Messages in Your Email Client

If your account is configured for PDF Delivery (or the sender has explicitly sent you a PDF delivery), you will receive secure messages as PDF attachments directly to your email client. This PDF attachment will be encrypted with your DataMotion SecureMail password, which you will need to enter to open and read it.

This message will appear to be from the sender of the secure message and have the same subject line of the original message with **(DataMotion SecureMail Delivery)** appended

to the end. The message will contain some information about the sender and instructions to follow to read the message.

To read the message, open the PDF file and enter your DataMotion SecureMail password.
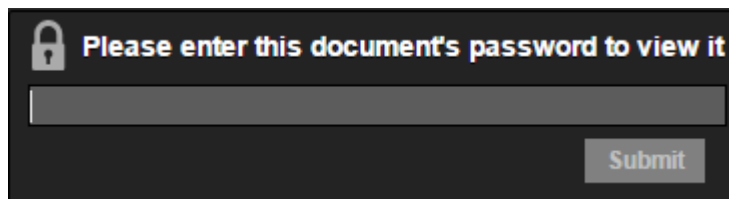
Viewing Messages in Your Web Portal Inbox

Once you have logged in, if you have new, unread messages, you will automatically be taken to the Inbox.

New, unread messages are highlighted by a NEW tag to the left of the message.

Once opened, a message will no longer display the NEW tag.

The **Forward**, **Reply to Sender** and **Reply to All** can be used to securely forward or reply to the message.

The **Download** link will allow you to download a PDF copy of the message.

View Message   Forward   Reply To Sender   Reply To All   Download

Receiving and Replying to Messages sent via Safe TLS

Unlike the traditional method of message retrieval described in the other sections above, messages sent using Safe TLS will arrive as plain text messages in the recipient's email client or web mail as long as they have TLS enabled. Replies to these messages can be performed directly from the email client or web mail as long as they are able to send TLS. In the event that the recipient is not able to respond with TLS, a footer is set at the bottom of messages sent using Safe TLS which contains a link allowing the recipient to reply securely. The following sections describe the general flow of how a Safe TLS message will function in a typical scenario.

Reply All Functionality

All replies for Safe TLS will follow a specific format when shown in the recipient's inbox. In a typical scenario when a recipient receives a Safe TLS message they will see something similar to the following:

`Jonx_1357890@safetls.datamotion.com`

This format shown above follows a format where the person's username on the system is followed by an "_" character and then their UID on the system is put in at the end. The Safe TLS domain to the right of the "@" symbol will typically be "safetls.datamotion.com" however depending on the system in use the domain that appears may be different (this is true in the event that the system is installed outside of DataMotion by your company).

Replying to a Message Sent via Safe TLS when Receive messages via Plain Text is enabled

In this scenario the Receive messages via Plain Text setting is enabled for the company whose user is sending the message. When this setting is enabled messages will not have a footer. The only way to respond to these messages is from the web mail or email client of the recipient. This is a convenient method of fully maintaining company transparency as the recipient will not be exposed to the DataMotion web

portal itself. An example of a message sent using Safe TLS with Receive messages via Plain Text enabled is shown below.

The recipient of this message would not know that this message is any different from a regular message they would receive from any other source.

NOTE: When Receive messages via Plain Text is enabled, the footer is removed from the message. Should the recipient be unable to respond via TLS, they will not be able to respond to any message they are sent in this manner.

Replying to a Message sent via Safe TLS when Receive messages via Plain Text is not enabled

In this scenario the Receive messages via Plain Text setting is not enabled for the company whose user is sending the message. Messages sent without this setting being enabled, will contain the footer telling them that they have received a secure message. The footer of these messages will contain a link to the web portal for the recipient to use if they are unable to reply using TLS. While this scenario lacks the same transparency described , there is always a way for the recipient to respond to the message regardless of whether they can reply via TLS. An example of a message sent using Safe TLS without the Receive messages via Plain Text setting is shown below.

Limitations of Safe TLS for Message Tracking

Whenever a message sent using Safe TLS is received, there will be minimal tracking information available on the sender side. This means that whenever a message is received and read by a recipient the Track Sent will not show the time and date of when it occurred. There will also be no notification sent back to the sender notifying them that the message was ever received/read by the recipient. Keep these facts in mind should they be a compliance issue for your company.

NOTE: The Sent via SafeTLS message status can be seen by system administrators of the company in the event that more in depth tracking is necessary for specific messages.

2

DataMotion SecureMail for Desktop Clients

This information describes how to set up and use the DataMotion SecureMail add-in for desktop clients (e.g., Microsoft Outlook), including how to send secure messages from your email client using the SendSecure button.

The DataMotion SecureMail add-in for Microsoft Outlook is also known as the SendSecure button. The SendSecure button refers to the icon that is installed in Microsoft Outlook, which looks similar to the following:

This information includes the following main topics:

- **_DataMotion SecureMail for Microsoft Outlook_** (below)
- **_DataMotion SecureMail POP3 Configuration_** (on page 118)

DATAMOTION SECUREMAIL FOR MICROSOFT OUTLOOK

INTRODUCTION

This information describes how to install and configure DataMotion SecureMail for Microsoft Office Outlook.

DataMotion SecureMail is cost effective, easy to install, and quick to implement. DataMotion SecureMail provides an easy way to securely send and track the delivery of confidential messages.

To simplify locating information, each section in this information is focused on a specific task or type of information.

ADDITIONAL INFORMATION

For information on using the DataMotion Portal to access your DataMotion SecureMail account, see Chapter 1, *DataMotion SecureMail Web Portal* (on page 15).

INSTALLING DATAMOTION SECUREMAIL FOR OUTLOOK

REQUIREMENTS

The installation of DataMotion SecureMail for Microsoft Office Outlook requires the following:

- A DataMotion SecureMail account
- The DataMotion SecureMail add-in installation file for Microsoft Outlook (see below)
- Microsoft .NET Framework 2.0 or higher
- Microsoft Office Outlook 2013/2016/2020 (32-bit or 64-bit)

It is helpful if the reader is familiar with installing software for Microsoft Windows and using Microsoft Office Outlook.

DOWNLOADING THE DATAMOTION SECUREMAIL ADD-IN

The Microsoft Outlook add-in for DataMotion SecureMail can be downloaded through your account on the web portal and integrates with Outlook to allow you to send secure messages from your email client.

1. Use the web browser to navigate to the DataMotion Portal site: https://ssl.datamotion.com.

   NOTE: Your organization may provide a customized URL to use instead of **https://ssl.datamotion.com**.

Login

Upon successful login, you may access your account to send and track your messages.

UserID or Email Address:

`kevinm@datamotion.com`

Password:

`··········`

☐ Remember UserID

[Login]

▼ Configure my language settings.

Auto-Detect Language ▼

2. Login with your email address and password.

3. Click the **Member Center** on the top menu bar.

4. Click the **Client Downloads** link.

   NOTE: This link may not be available for all users. If it is not available, contact your System Administrator.

5. Using the instructions on the screen, select the latest version of DataMotion SecureMail for Outlook that is appropriate for your version of Outlook, and then click **Download Now!**. (For more information, see *Download Console: Client Downloads* on page 53.)

   NOTE: The 64-bit version is only used with Microsoft Outlook 2010 or 2013 64-bit.

6. Save the installation file to your hard disk.

   IMPORTANT! All DataMotion SecureMail for Outlook downloads are customized for each individual account. The DataMotion SecureMail program you download will not install correctly for any other email address or account. It will only work with your DataMotion SecureMail account.

INSTALLING THE DATAMOTION SECUREMAIL ADD-IN

Perform the following steps to install the DataMotion SecureMail for Outlook add-in button.

1. Close Outlook if it is open.

2. Double-click the installation file that you downloaded in *Downloading the DataMotion SecureMail Add-In*.

3. On the Welcome screen, click **Next**.
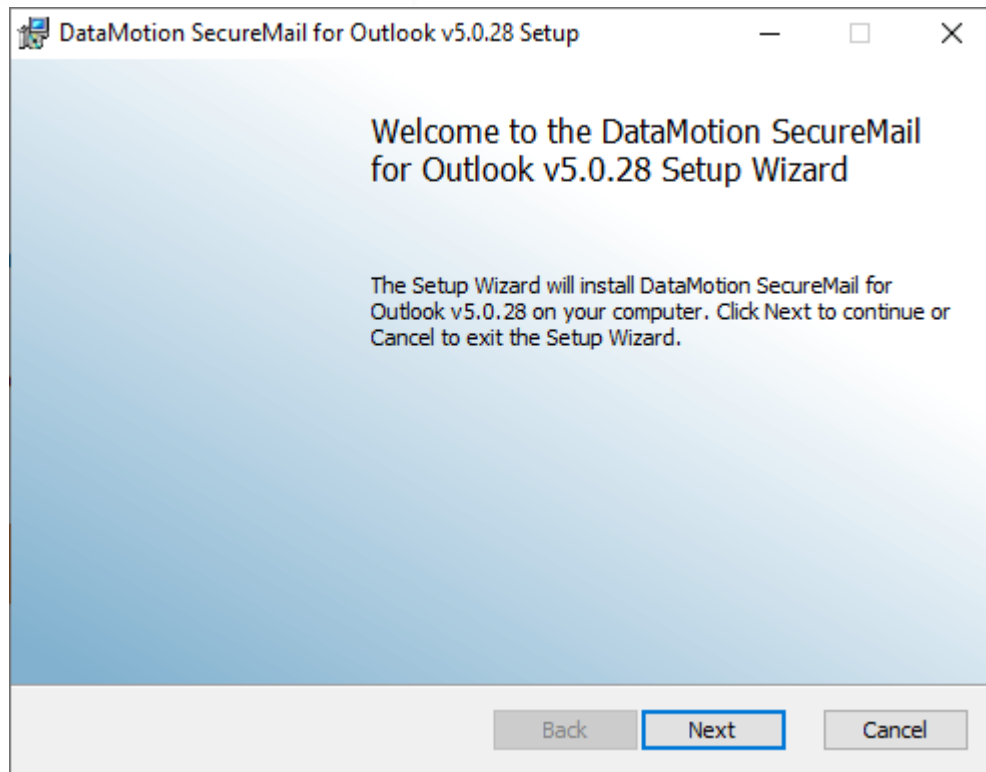
4. On the End-User License Agreement screen, check the box for **I accept the terms in the License Agreement**, and click **Next** to continue.
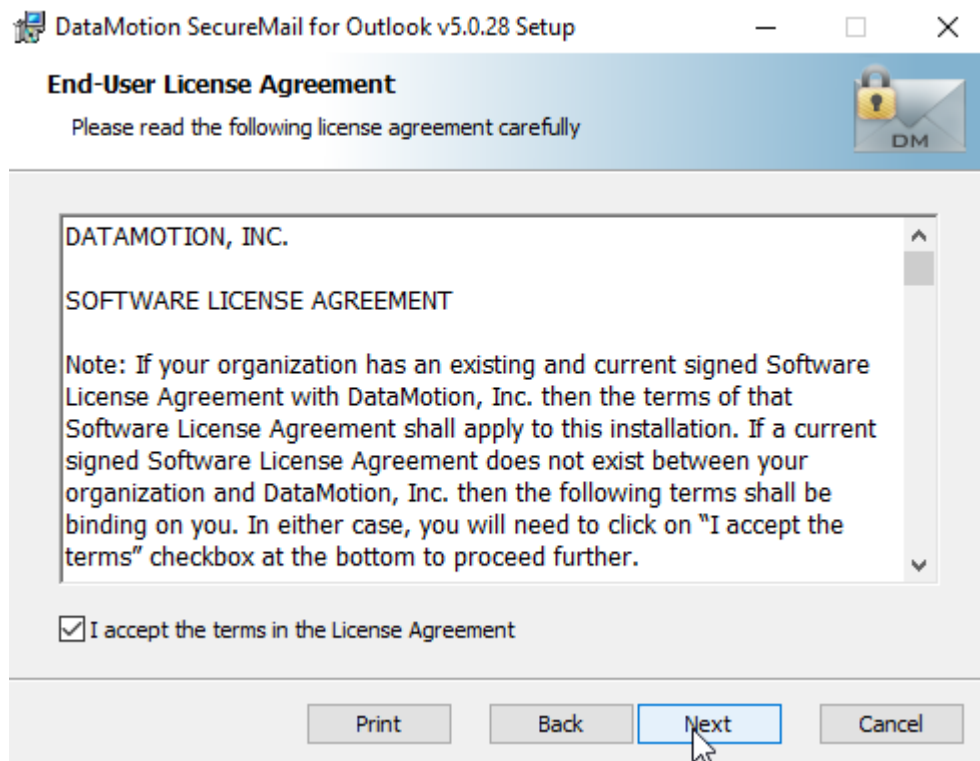
5. On the **Ready to install** screen, click the **Install** button.
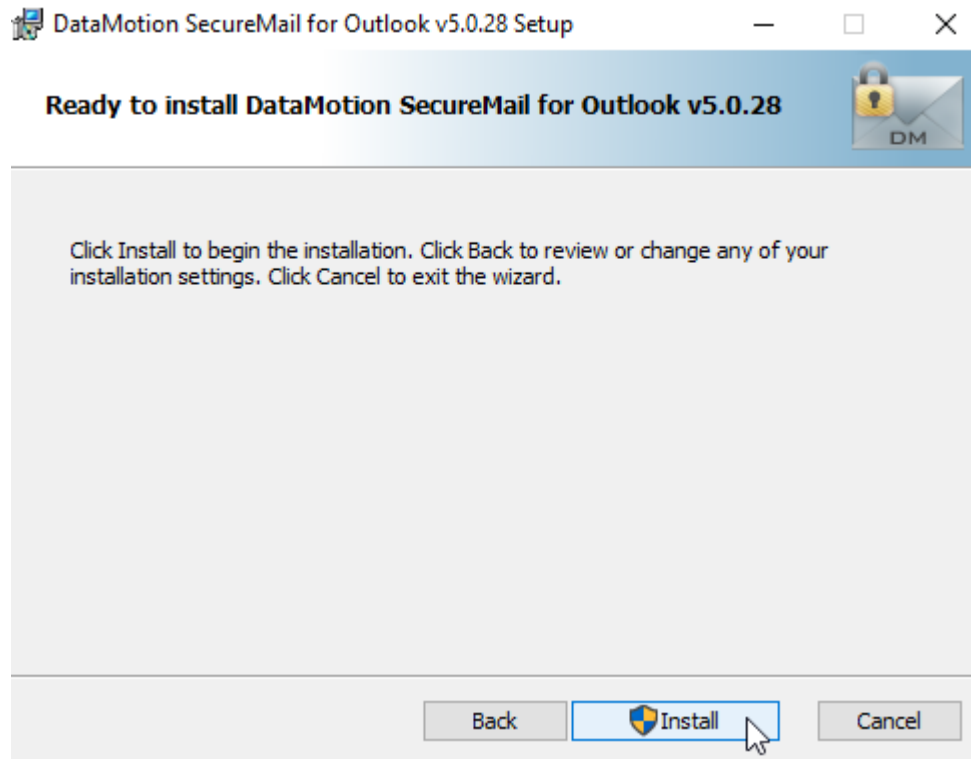
6. On the **Completed** screen, click **Finish**. If you would like to automatically launch Outlook, check the **Launch Outlook when setup exits** before clicking **Finish**.
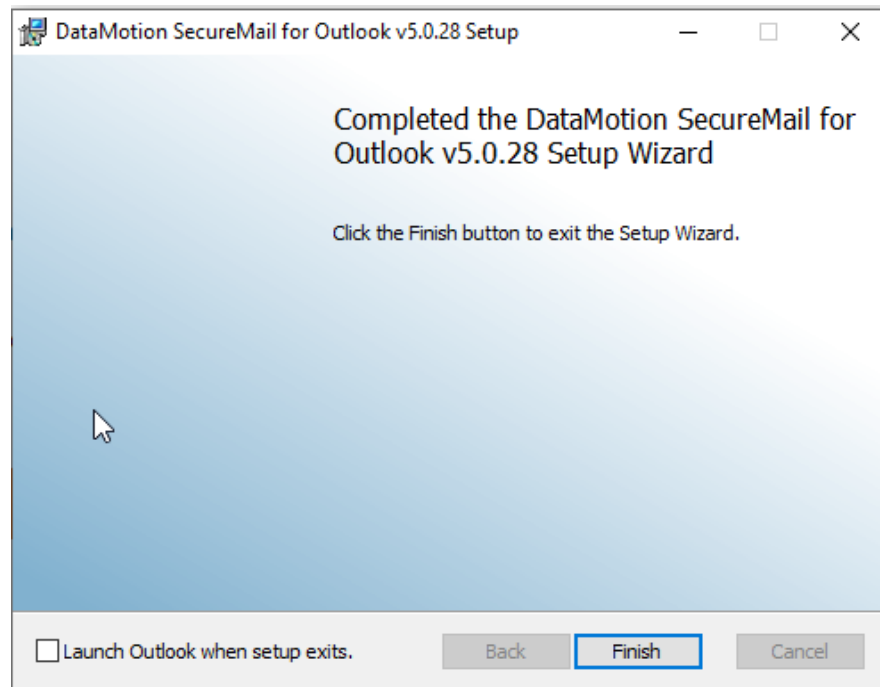
DataMotion SecureMail for Outlook is now installed and ready for use.

。 DataMotion, Inc. Confidential and Proprietary Information [#050006–08] ƒ

2

DataMotion SecureMail for Desktop Clients

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USING THE SEND SECURE BUTTON IN OUTLOOK

SENDING SECURE MESSAGES

The Send Secure button allows you to send a secure message as easily as sending a regular email, just by clicking the **Send Secure** button instead of the Send button.
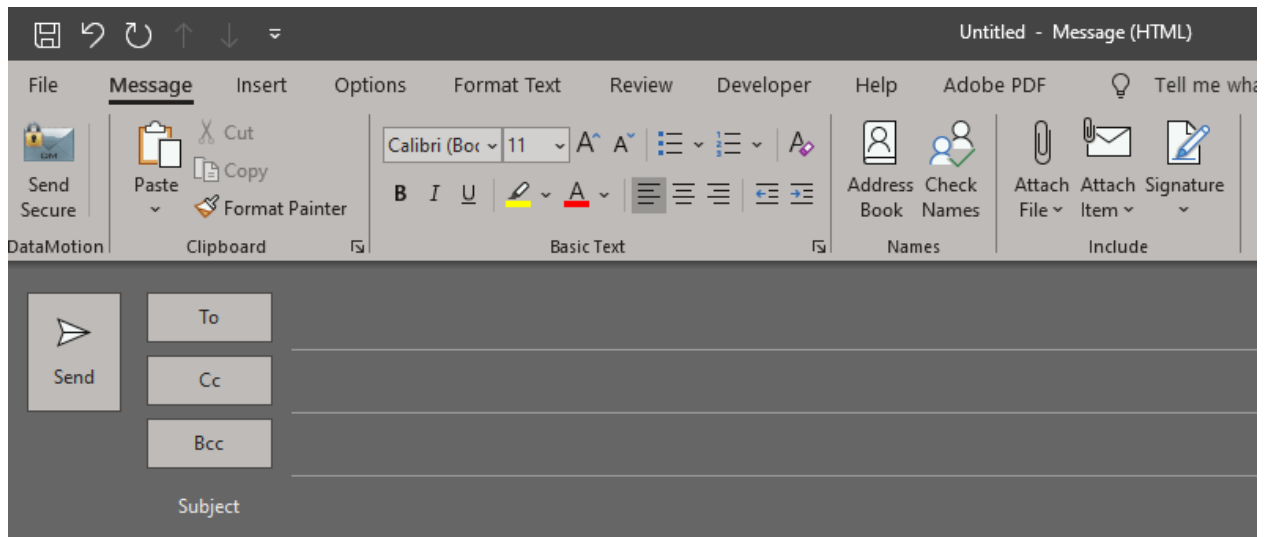
Compose a new message, reply to or forward a message, and add attachments the way you normally would. Then click the Send Secure button, and the message will be securely sent to the listed recipients.
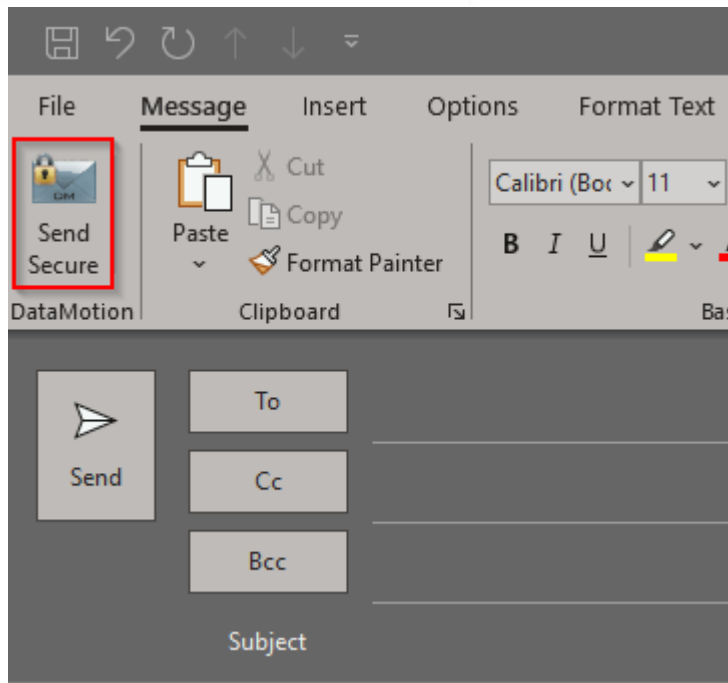
DATAMOTION SECUREMAIL POP3 CONFIGURATION

DataMotion SecureMail is the only message encryption service that directly integrates into any desktop or mobile email client using secured POP3 and SMTP connections. When these protocols are enabled, users can send and receive secure messages directly to and from their email client without installing any extra software.

Your DataMotion SecureMail address is probably the same as your primary or corporate email address, and if so your device is already configured to access your primary email account. In order to make it easier to distinguish your primary email account from your DataMotion SecureMail account, we will use a modified version of your email address for this account. Do not worry; this is not a new email address but a way to distinguish between your primary email account (where you send unsecured email) and your DataMotion SecureMail account.
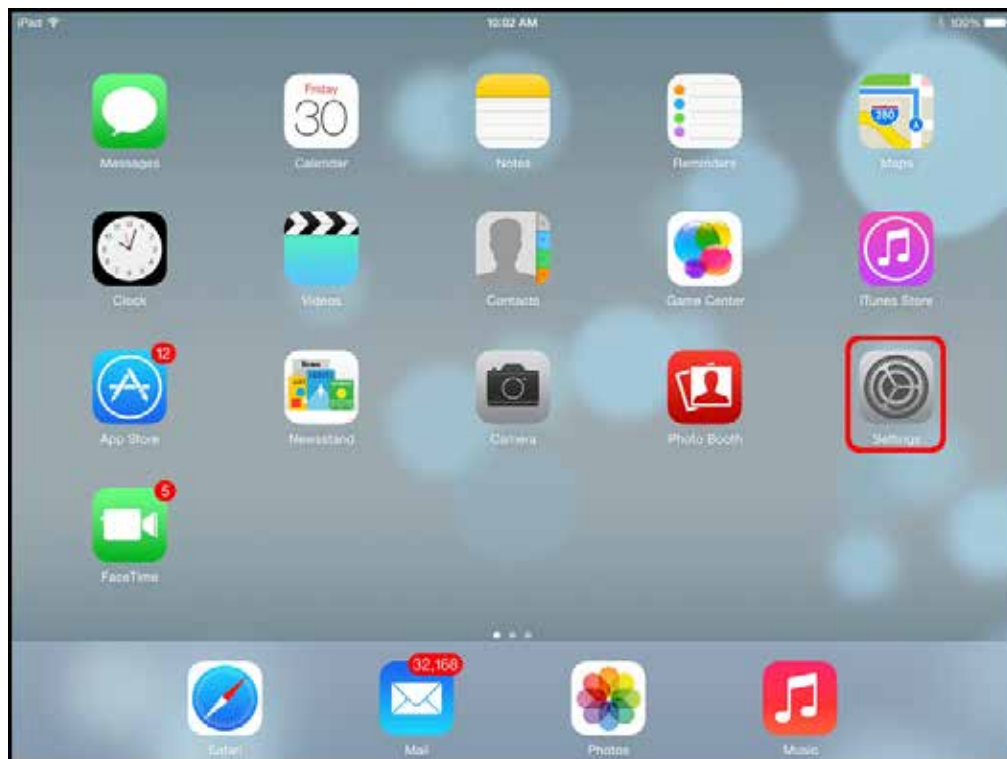
The table below provides the information necessary to configure your mail client. Substitute the regular email address that is registered with DataMotion SecureMail where you see *<your email address>*.

Email Account name	"*<your email address>*"
Incoming Mail Server	**Server Type**: POP3 **Server**: ssl.datamotion.com **Use SSL**: Yes **Port**: 995 **Authentication**: *<your email address>* and your DataMotion SecureMail password
Outgoing Mail Server	**Server**: smtp.datamotion.com **Use TLS**: Yes (select TLS or STARTTLS) **Port**: 25 or 587 **Authentication**: *<your email address>* and your DataMotion SecureMail password

DATAMOTION SECUREMAIL SMTP AND ARCHIVING

It is important to understand that messages send via the DataMotion SecureMail POP3 and SMTP service will bypass your organization's mail servers, and this could impact the ability to archive these messages.

DataMotion provides organizations several ways to integrate with your existing archiving solution, but it does not happen by default. If you have any concerns, contact your administrator or DataMotion Customer Service for more information.

3
DataMotion SecureMail for Tablets

This information describes how to set up and use DataMotion SecureMail for tablets (e.g., Apple iPad* device), including how to receive and send secure messages from within the native mail application. It includes the following main topics:

- *DataMotion SecureMail for Apple iPad* (below)

DATAMOTION SECUREMAIL FOR APPLE IPAD

DataMotion SecureMail can be accessed from your Apple iPad* device to allow you to receive and send secure messages from within the native mail application. This information will provide step-by-step instructions for configuring and using DataMotion SecureMail from your iPad.

Your DataMotion SecureMail address is probably the same as your primary or corporate email address, and if so your device is already configured to access your primary email account. To make it easier to distinguish your primary email account from your DataMotion SecureMail account, we will use a modified version of your email address for this account. Do not worry; this is not a new email address but a way to distinguish between your primary email account (where you send unsecured email) and your DataMotion SecureMail account.

CONFIGURING DATAMOTION SECUREMAIL FOR THE IPAD

DataMotion SecureMail for a mobile device is comprised of a POP3 service which allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.

CONFIGURING DATAMOTION SECUREMAIL USING THE MAIL APP

To configure your iPad, follow these steps:

1. From the iPad Home Screen, select **Settings**.

2. Select the **Mail, Contacts, Calendars** option.

3. Select the **Add Account…** option (at the bottom of any Mail Accounts you already have).

4. Select **Other** as the type of account.

5. Select the **Add Mail Account** option under Mail.

6. Enter the following information:

» **Name**: *Your name*

» **Address**: "*-<your email address>*"

» **Password**: Your DataMotion SecureMail password

» **Description**: DataMotion SecureMail

7. Select **Next**.

8. Select **POP**. It should be blue once it is selected.

9. Under **Incoming Mail Server** enter the following information:

» **Host Name**: ssl.datamotion.com
» **User Name**: "*<your email address>*"
» **Password**: Your DataMotion SecureMail password

10. Under **Outgoing Mail Server** enter the following information:

> » **Host Name**: smtp.datamotion.com
> » **User Name**: "*<your email address>*"
> » **Password**: Your DataMotion SecureMail password

11. Select **Save**. The account information will be verified.

12. The account should now be listed in your Accounts list as DataMotion SecureMail.

Delete Messages From Server (Optional)

To configure this account to delete mail from server follow these steps:

1. Press DataMotion SecureMail.

2. Scroll down and select **SMTP.**

3. Select **Advanced.**

4. Select a setting for **Delete from Server:** as follows:

   » **Never:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion SecureMail server (and web portal) until they expire or you manually delete them there.

   » **When removed from Inbox:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion SecureMail server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

   » **7 Days:** When you delete messages from your device Inbox, they will be retained in your Inbox on the DataMotion SecureMail server for 7 days, after which they will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

USING DATAMOTION SECUREMAIL FOR THE IPAD

Now that you have setup your DataMotion SecureMail account you can use it to receive and send secure messages.

RECEIVING SECURE MESSAGES

When you open the Mail app on your iPad you will see a new account called DataMotion SecureMail. All your secure messages will be downloaded into this account where they will be able to be read like mail messages sent to any other accounts setup on your phone. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

NOTE: Your device does not display Push Notifications for incoming DataMotion SecureMail messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.

SENDING SECURE MESSAGES

With your new DataMotion SecureMail account configured on your iPad you can now send secure messages directly from your phone. When you compose a new message or reply to an existing message, simply select the DataMotion SecureMail account as the **From** address and it will be sent securely.
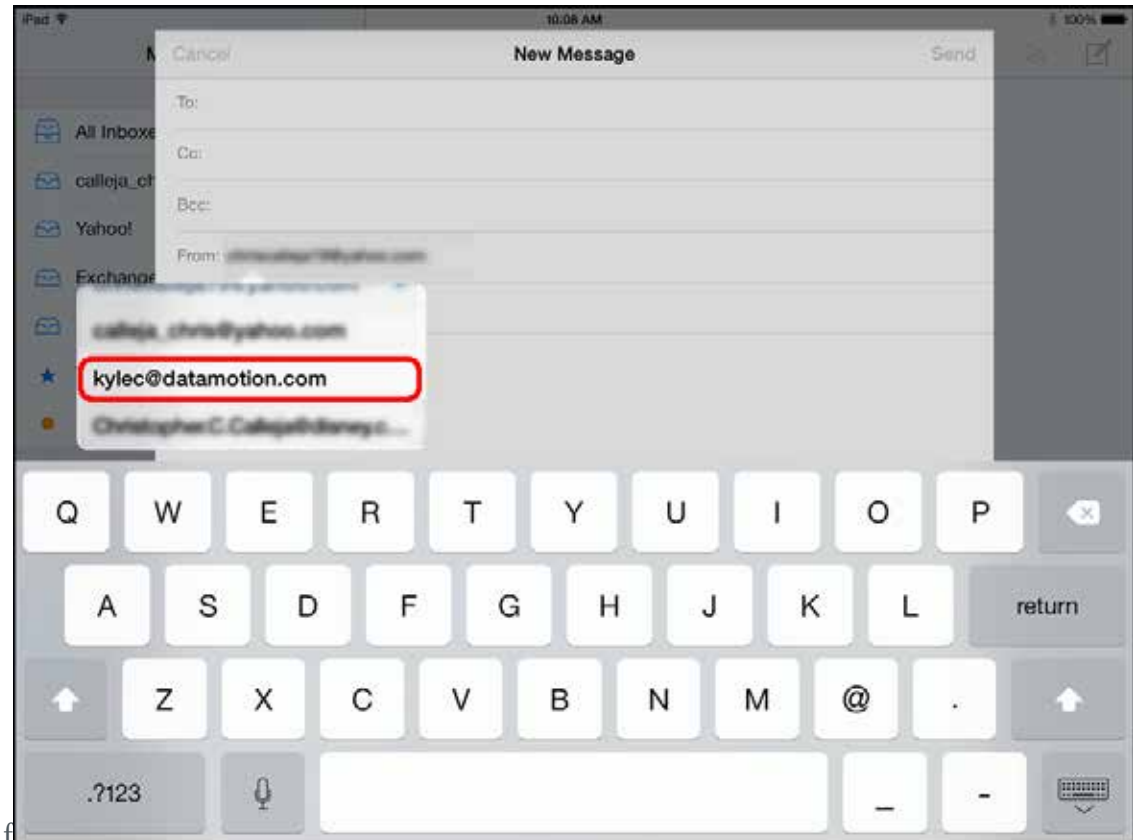
4
DataMotion SecureMail for Smartphones

This information describes how to set up and use DataMotion SecureMail for smartphones (iPhone, Android devices, etc.), including how to receive and send secure messages from within the native mail application. It includes the following main topics:

- *DataMotion SecureMail for Apple iPhone* (below)
- *DataMotion SecureMail for Android* (on page 141)

DATAMOTION SECUREMAIL FOR APPLE IPHONE

DataMotion SecureMail can be accessed from your Apple iPhone* device to allow you to receive and send secure messages from within the native mail application. This information will provide step-by-step instructions for configuring and using DataMotion SecureMail from your iPhone.

Your DataMotion SecureMail address is probably the same as your primary or corporate email address, and if so your device is already configured to access your primary email account. In order to make it easier to distinguish your primary email account from your DataMotion SecureMail account, we will use a modified version of your email address for this account. Do not worry; this is not a new email address but a way to distinguish between your primary email account (where you send unsecured email) and your DataMotion SecureMail account.

CONFIGURING DATAMOTION SECUREMAIL FOR THE IPHONE

DataMotion SecureMail for a mobile device is comprised of a POP3 service which allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.

CONFIGURING DATAMOTION SECUREMAIL USING THE MAIL APP

To configure your iPhone, follow these steps:

1. From the iPhone Home Screen, select **Settings**.
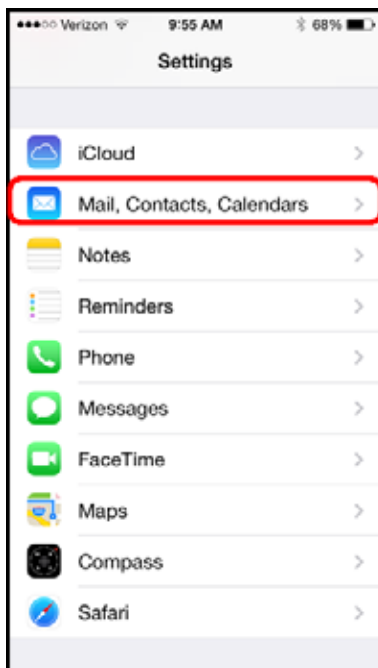
2. Select the Mail, Contacts, Calendars option.

3. Select the **Add Account…** option (at the bottom of any Mail Accounts you already have).

4. Select **Other** as the type of account.
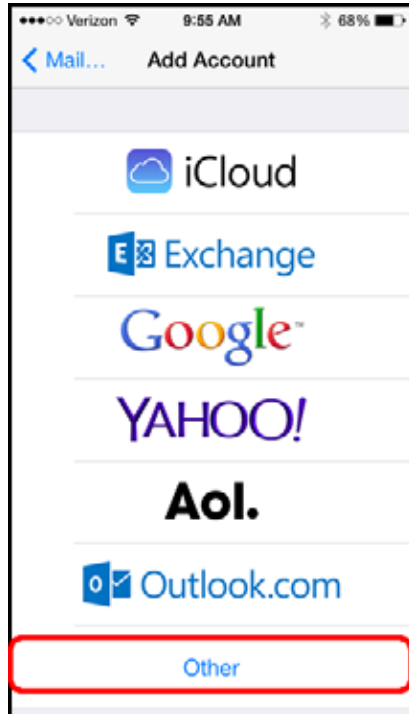
5. Select the **Add Mail Account** option under Mail.
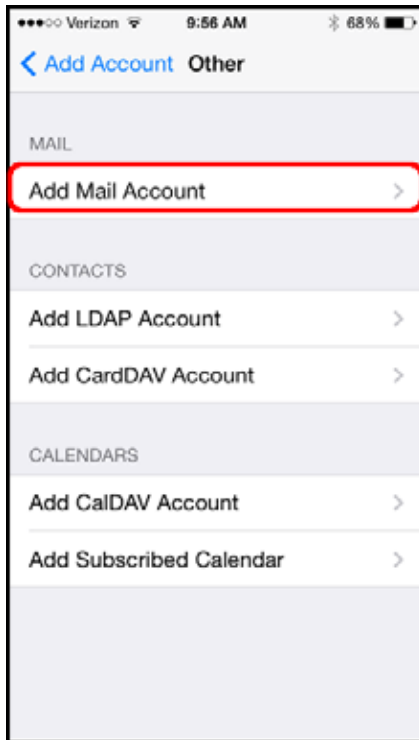
6. Enter the following information:
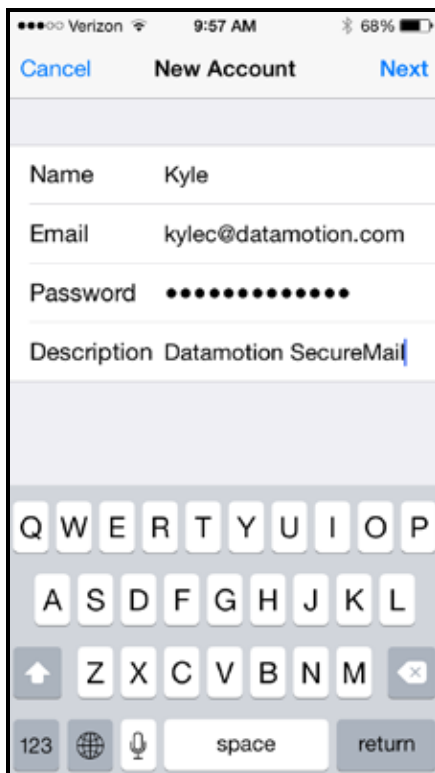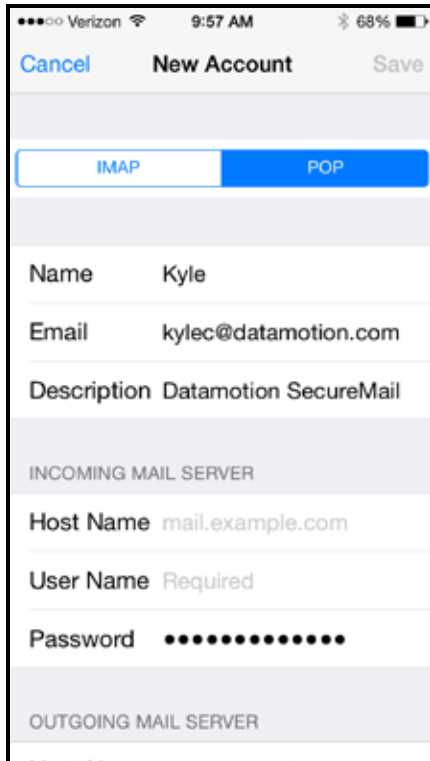
» **Name**: Your name

» **Address**: "secure-<your email address>"

» **Password**: Your DataMotion SecureMail password

» **Description**: DataMotion SecureMail

7. Select **Next**.

8. Select **POP**. It should be blue once it is selected.

9. Under **Incoming Mail Server**, enter the following information:

» **Host Name**: ssl.datamotion.com

» **User Name**: "<your email address>"

» **Password**: Your DataMotion SecureMail password

10. Under **Outgoing Mail Server**, enter the following information:

» **Host Name**: smtp.datamotion.com

» **User Name**: "<your email address>"

» **Password**: Your DataMotion SecureMail password

11. Select **Save**. The account information will be verified.

12. The account should now be listed in your Accounts list as DataMotion SecureMail.

NOTE: To configure this account to delete mail from server follow these steps:
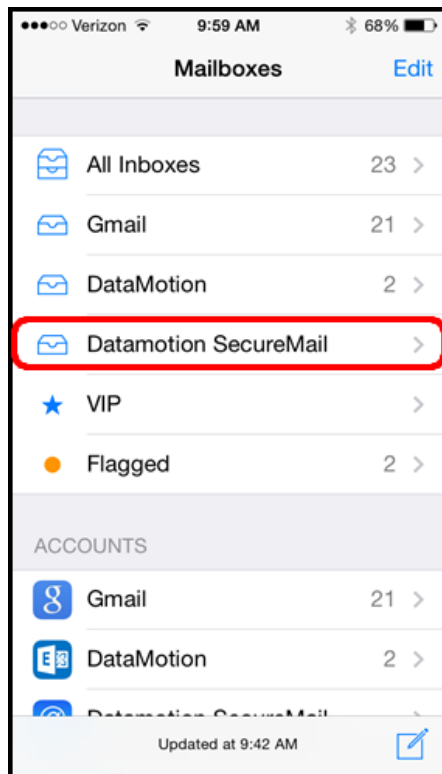
1. Press DataMotion SecureMail.

2. Scroll down and select **SMTP.**

3. Select **Advanced.**

4. Select a setting for **Delete from Server:** as follows:

   » **Never:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion SecureMail server (and web portal) until they expire or you manually delete them there.

   » **When removed from Inbox:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion SecureMail server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

   » **7 Days:** When you delete messages from your device Inbox, they will be retained in your Inbox on the DataMotion SecureMail server for 7 days, after which they will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

USING DATAMOTION SECUREMAIL FOR THE IPHONE

Now that you have setup your DataMotion SecureMail account you can use it to receive and send secure messages.

RECEIVING SECURE MESSAGES

When you open the Mail app on your iPhone you will see a new account called DataMotion SecureMail. All your secure messages will be downloaded into this account where they will be able to be read like mail messages sent to any other accounts setup on your phone. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

NOTE: Your device does not display Push Notifications for incoming DataMotion

SecureMail messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.

SENDING SECURE MESSAGES

With your new DataMotion SecureMail account configured on your iPhone you can now send secure messages directly from your phone. When you compose a new message or reply to an existing message, simply select the DataMotion SecureMail account as the **From** address and it will be sent securely.

DATAMOTION SECUREMAIL FOR ANDROID

DataMotion SecureMail can now be accessed from your Android device to allow you to receive and send secure messages from within the native mail application. This information will provide step-by-step instructions for configuring and using DataMotion SecureMail from your Android.

Your DataMotion SecureMail address is probably the same as your primary or corporate email address, and if so your device is already configured to access your primary email account. In order to make it easier to distinguish your primary email account from your DataMotion SecureMail account, we will use a modified version of your email address for this account. Do not worry; this is not a new email address but a way to distinguish between your primary email account (where you send unsecured email) and your DataMotion SecureMail account.

CONFIGURING DATAMOTION SECUREMAIL FOR ANDROID

DataMotion SecureMail for a mobile device is comprised of a POP3 service which allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.
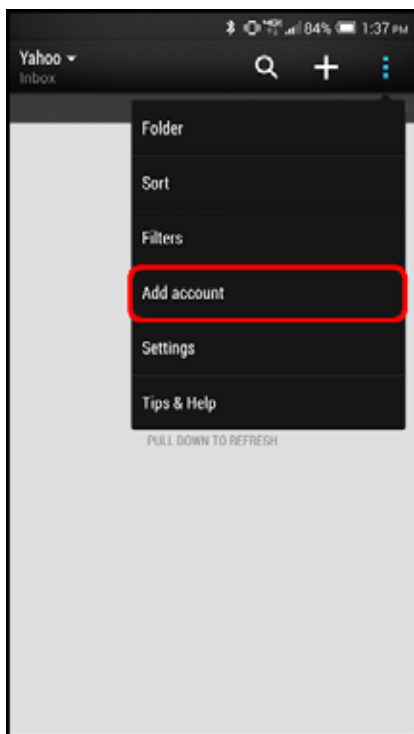
CONFIGURING DATAMOTION SECUREMAIL USING THE EMAIL APP

These steps assume you are using the default Android Email app, and that it has not been skinned by the manufacturer. To configure your Android, follow these steps:
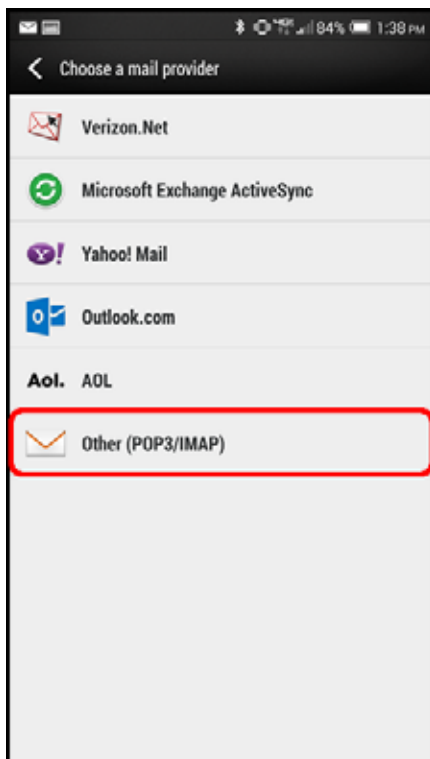
1. From the Android Home Screen, open the **Email** app.
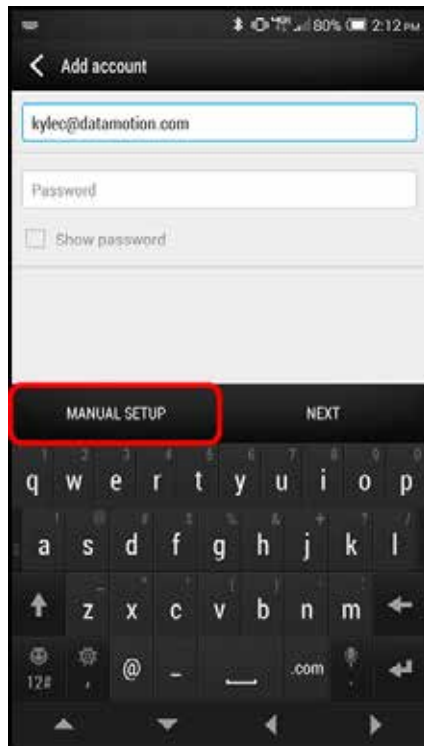2. Press the **Menu** button.

3. Select **Accounts** from the menu.

4. Select **Other** from the menu.

5.   Enter the following information and click manual set up.

»   **Email address**: "<your email address>"

»   **Password**: Your DataMotion SecureMail password

6. For **Incoming server settings** enter the following information:

» **Protocol**: POP

» **Username**: "<your email address>"

» **Password**: Your DataMotion SecureMail password – this should already be entered

» **POP3 server**: ssl.datamotion.com

» **Port**: 995 - this will change when you select the correct Security type

» **Security type**: SSL – don't select to "Accept all certificates"

7. Select **Next**.

8. For **Outgoing server settings** enter the following information:

» **SMTP server**: smtp.datamotion.com

» **Port:** 587

» **Security type:** TLS - don't select to "Accept all certificates"

» Require sign-in: checked

» **Username**: "*<your email address>*" – this should already be entered

» **Password**: Your DataMotion SecureMail password – this should already be entered

9. Select **Next.**

10. Enter a **Name** for this account to distinguish it from your other accounts and select **Finish Setup** to complete the set up.
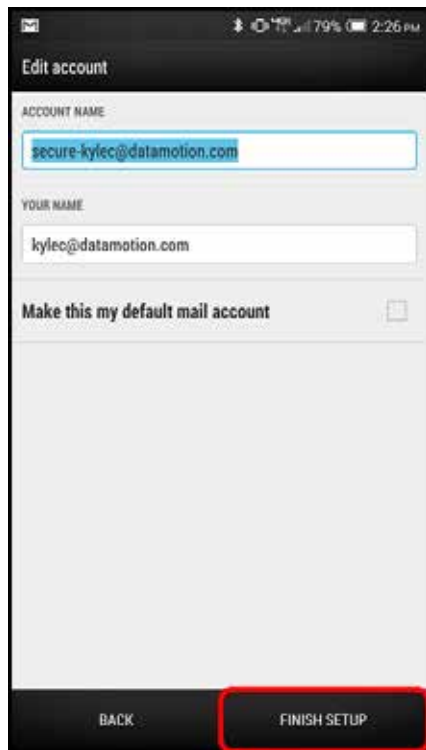
11. The account should now be listed in your Accounts list as SecureMail.
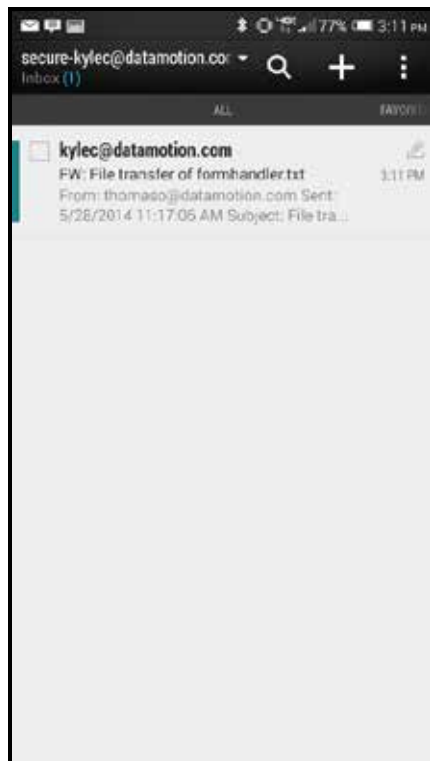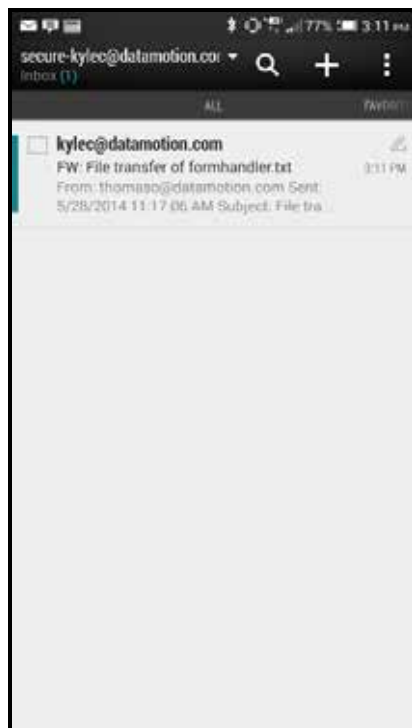
12. You may do the following optional steps if you want to configure whether your messages should be deleted from the DataMotion SecureMail server when you delete them from your device Inbox. (The delete from server default is Off, which means do not delete them from the server.)

n Select your SecureMail account from the drop down.

n Press the **Menu** button and click on **Settings**.

n Select **Sync, Send & Receive**.

n Scroll down to the bottom of the page and select the desired setting for **Delete mail on server**:

 » **Off:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion SecureMail server (and web portal) until they expire or you manually delete them there.

 » **On:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion SecureMail server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them from the web portal.

USING DATAMOTION SECUREMAIL FOR ANDROID

Now that you have setup your DataMotion SecureMail account you can use it to receive and send secure messages.

RECEIVING SECURE MESSAGES

When you open the Email app on your Android device you will be able to see a new account called DataMotion SecureMail in your accounts list. All your secure messages will be downloaded into this account where they will be able to be read like mail messages sent to any other accounts setup on your phone. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

NOTE: Your device does not display Push Notifications for incoming DataMotion

SecureMail messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.

SENDING SECURE MESSAGES

With your new DataMotion SecureMail account configured on your Android device you can now send secure messages directly from your device. To send a secure message, open the DataMotion SecureMail account and compose a new message. The new message will automatically be sent securely to the recipient.

5
SecureFileTransfer

INTRODUCTION

DataMotion SecureMail provides an easy to use file transfer solution with multiple interfaces for end users to send and receive files to meet the needs of diverse organizations. The File Transfer solution is integrated with DataMotion SecureMail to provide a secure method for notification and delivery of new files to end users.

Sending and receiving files with SecureFileTransfer can be done through either a web browser or an SFTP client. The files that can be sent are predetermined by the administrator and easily labeled for the end user to know exactly what they are sending. Additionally files sent through DataMotion SecureMail provide tracking information for the end user to know when the files were received and delivered.

The purpose of this information is to describe the SecureFileTransfer services included with your DataMotion SecureMail user account.

This information describes how to use your web browser to send, receive, and view files via the DataMotion SecureMail web portal, or alternatively, how to use an SFTP client that connects to the DataMotion SFTP server to upload and download files. It describes the tracking information and notifications that indicate when the files were securely delivered and received.

DataMotion SecureMail provides an easy to use file transfer solution with multiple interfaces for users to both upload and receive files in a secure manner.

To simplify locating information and answering questions about functionality, each section in this guide is focused on a specific task or type of information.

Users who intend to use SFTP clients for file transfers should be familiar with how to use their preferred client.

ACCESSING SECUREFILETRANSFER

ACCESSING YOUR DATAMOTION ACCOUNT

There are two interfaces to access your DataMotion SecureMail account: through a web browser or through an SFTP client. The DataMotion Portal web interface provides account management and tracking functions as well as the ability to upload and receive files while the SFTP interface only allows uploading and downloading of files.

The first step to using SecureFileTransfer is to establish your account and password. When your account is created, you will be sent an email notification to login and set up a new password.

> **NOTE: SecureFileTransfer is a complementary set of features to DataMotion SecureMail, and relies on several components of DataMotion SecureMail. While your account may be enabled for SecureFileTransfer functionality only, messages generated by the server will reference DataMotion SecureMail. Contact your administrator for more information about gaining access to additional DataMotion SecureMail functionality if you do not have it.**

If you have not accessed your DataMotion account for the first time to set it up, see *Getting Started* on page 16.

If you want to access your DataMotion account through the web portal, or if you have forgotten or want to reset your password, see *Accessing the DataMotion Portal* on page 34.

ACCESSING THE DATAMOTION SFTP SERVER

The DataMotion SFTP Server only provides access to send and receive files. Any other actions must be performed through the DataMotion Portal.

To access your SecureFileTransfer account through the SFTP Server:

1. Open your SFTP client and connect to ssl.datamotion.com.
2. Enter your email address or User ID and password
3. Accept the SSH key provided by the server and add it to your SSH key store

Once successfully authenticated you will see the folders where you can access the files stored in your account.

DATAMOTION PORTAL OVERVIEW

MEMBER CENTER

Once you have logged into your DataMotion SecureMail account, you will be shown the Member Center. The Member Center is the central location for your account. From here you can get to all the functionality of your account.

NOTE: If you have new received files, you will be redirected instead directly to your Inbox instead of the Member Center.

There are four sections that provide links to different aspects of your account plus a summary view.

NOTE: If your account also has secure messaging functionality, additional options will be shown.

Messages & Files

This section provides access to received file-related functionality. The options are:

Link	Description
Inbox	Opens the Inbox for files you have received.
Folders	Opens the folder management window where you can create and manage subfolders which you can use to manage your files.

Workflows

This section provides access to sending files functionality. The options are:

Link	Description
Upload Workflow	Opens the Upload Workflow window to upload a new file to be sent.

Link	Description
Track Workflows	Opens the Track Workflows folder where you can see all the files you have sent and review their status information.

My Account

This section provides access to account settings. The options are:

Link	Description
Address Book	This is not used with SecureFileTransfer.
User Information	Provides access to account and password settings including SSH keys.
Preferences	Provides access to settings related to how you receive notifications and account preferences.

Account Details

The Account Details area provides a snapshot of information about your account. You can see the number of messages or files sent and received, information about the amount of disk space available on your account and your login statistics.

MENU BAR

The menu bar provides quick access to common functions from all windows. The menu bar does not change as you move around the Portal.

The following options are available on the menu bar:

Menu	Description
Upload Workflow	Opens the Upload Workflow window to upload a new file to be sent.
Member Center	Takes you back to the Member Center
Inbox	Opens the Inbox for secure files or messages you have received.
Track Workflows	Opens the Track Workflows folder where you can see all the files you have sent and review their status information.
Logout	Ends the current session. Once you click this you will need to login again to access SecureFileTransfer functions.

CHANGING YOUR USER INFORMATION

You are able to edit your account information. To edit your information:

1. Go to the Member Center.
2. Under the **My Account** section, click **User Information**.

This will open the **User Information** page.

Understanding Your User Information Options

The following table explains the information which can be configured.

Option	Description
Login ID	You can choose a username to utilize for authentication to the Portal. If you enter a Login ID here you can login with **either** your email address or your ID. The username you select must be unique.
First & Last Name	You can enter your name. It will be used in notification messages sent to you.
Email Address	Your email address
Password Management	Clicking the Change Password link will show you a page where you can change your password. You will need to enter your existing password first.
Opt In to receive relevant information, notices and offers	If you check this box DataMotion will send you offers and notices about DataMotion products. DataMotion will never sell or provide your account information to any other organization.
A SFTP public key exists	Here you can upload your SSH public key. When a public key is associated with your account you can access the DataMotion SFTP Server with your User ID and the SSH key.

SSH Keys & Authentication

The SFTP protocol allows users to login using their User ID and the SSH private key instead of a password. This is a very common authentication method in file transfer systems and can be used by the DataMotion SFTP Server if an SSH public key is associated with the account. Even when a key is associated with the account, access to the DataMotion Portal will require the use of a password.

To upload an SSH key, it must be in the standard SSH2 format. An example of such a key is:

```
---- BEGIN SSH2 PUBLIC KEY ----

Comment: Generated by rsmith@galacticseats.com.

AAAAB3NzaC1yc2EAAAABEQAAAQEA6254D3FG/6bLNXRMZpOMwuLuL8X3d5q4TxChEU/1jK
9G

wy0kxueNLXRNAw2z+sGwdZqCN2m81jQO6bLay64dOh4qjJE4ZP6vnuxDX4t8WEm2WZO9qq
bP

qM0QjcMGNr/OSuVWRG3LZrSEcMFuUqIqnjeV3wXicNFcbHoRQDqwUNRSU8VDk9NBcvl5bC
t0

EYQyj2M4QsnaO9dAo3stEZ0Vf9kvNuhQEDXiXM+IIILmNI2Tam/+tgC/0EUChKHvzPuhDI
jM

zOpHJ2cq5yBtBNJmayTqmBmdHWsKOTUXHfHdjmksl/jQgF3MdkoGio8J5NRCiY227TrhQ9
ih

ggPY+tDFtQ==

---- END SSH2 PUBLIC KEY ----
```

Using the Browse button you can locate the file where this key is stored and import it to your account. If you ever need to change your SSH key, you would need to change the key here to be able to continue accessing the DataMotion SFTP Server without entering a password.

CHANGING YOUR ACCOUNT PREFERENCES

DataMotion SecureMail gives you the ability to configure how you can receive notification messages sent to you. To configure your preferences:

1. Go to the Member Center.

2. Under the **My Account** section, click **Preferences**.

This displays the **Account Preferences** page.

Understanding Your Account Preference Options

In most instances, the default values do not need to be changed as they are the most common settings for our customers. The following table provides a description of the options.

NOTE: The following settings are not used by SecureFileTransfer accounts: Message Priority, Receive email receipts, Read Confirmation, Message Expiration, email format and Signature.

Option	Description
Date Time Format	Configure the preferred date/time format (e.g., 24-hour time or am/pm time) you will see in your message headers. The default value is **M/d/yyyy 12:00:00 AM/PM**.
Time Zone	Use the drop-down field to select the time zone for your account. The time zone is reflected anywhere the time is displayed, including when viewing Inbox or Track Sent messages and in Notification messages. The default value is **(GMT-5:00) Eastern Time (US & Canada)**. NOTE: The time zones in the drop-down follow the same order of your computer's time zone list. Due to this, the order may not be the same on every device.

When you're done modifying your preferences, click **Save**.

NAVIGATING AND MANAGING YOUR FILES

GENERAL NAVIGATION

The file message windows (sending and receiving) provide a common set of navigation functions, including searching, sorting and message management.

NOTE: Files sent to your account are treated as "messages" like an email showing a sender and the Business File Name as the Subject.

Customizing the Message Folder Windows

The message folder window provides several ways to customize the display of messages.
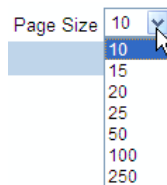
Sorting Your Messages

By default, messages are displayed sorted from the newest to the oldest. It is possible for messages to be sorted by any column shown (ID, Date, From, Subject or Size), in ascending or descending order. This can be done by clicking on the column header you want to sort on.

The first click will sort all the messages in ascending order based on the information in that column. A second click will sort in descending order for that column.

NOTE: The sorting order is reset to ascending order by the Date field whenever you change to a new message folder (such as creating a new message and then returning to the Inbox).

Changing the Page Size

The Page Size field specifies how many messages should be displayed at one time. The default is to show 10 messages.

When there are more messages than can be displayed on a single page, a new dropdown will be shown with the number of pages. This dropdown can be used to quickly jump between pages of messages.


The Page Size setting is a persistent setting and will be remembered even between logins.

Searching Messages

There is a simple search and an advanced search function for your messages.

Simple Search

The simple search function is limited to searching only the current folder. Further, it only searches for patterns for the fields listed in the dropdown list: Subject, ID, From and Date.
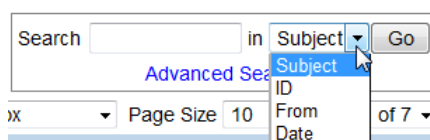
NOTE: The search looks for exact matches only. Entering a partial string will not return any results. To search with wildcards the % symbol must be used. For example, to find all messages with a subject that starts with "new", you need to search for "new%" as the string.

To perform a simple search:

1. Enter a string into the **Search** box

2. Select where the string should be found

3. Click **Go**

All messages with a match will be shown. To clear the simple search filter you can either click the Back button on your browser or open the folder again.

Advanced Search

Additional search options are available by choosing the Advanced Search link.

Within the Advanced Search you have the ability to fine tune your search results over a wider range of options. You only need to fill in the fields you need; any left blank will not be used as search parameters.

The following table describes the search fields.

Search Fields	Description
Search In	Selections are Inbox or Track Sent.

Search Fields	Description
Folder Name	Select the folder to search using the drop-down list. The drop-down list shows only the subfolders for the selected folder type. You can choose to search either All Folders (which is the default option), a selected subfolder, or you can exclude Subfolders and just search the main Inbox or Track Sent folder.
Tracking ID	The ID numbers assigned to each message
Start Date	The earliest date to search
End Date	The latest date to search
Subject	The Subject line of messages must match the text that you enter here. The Search is case-insensitive and will locate the text you enter regardless. You can use wild cars to match the text. The asterisk (*) or percent sign (%) can be used to match any number of preceding or following characters. For example, "* Plan" will match messages with a subject of "2015 Planning" and "Marketing Plan".
From/Recipient Email	The sender or recipient of the message (depends on whether you are searching the Inbox or Track Sent)
Sort By	The field which should be used to sort the results in ascending order (or descending if the Reverse Order is checked)

Clicking **Search** will display the results of the specified parameters. The **Clear Form** button will clear any entries on this page.

Once a search has been performed, a new Search box will be displayed.

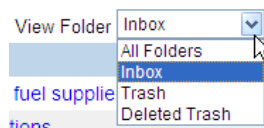The following results have been filtered.
Modify Search | Clear Search

The **Modify Search** link will open the Advanced Search window with the current search parameters. **Clear Search** will clear the search parameters and reset the folder view.

Changing Folders

There are several ways to navigate to a new folder. For example, the Inbox, Track Sent and Drafts folder links are available directly from the menu bar while the Inbox and Track Sent links are also available from the Member Center.

Another way to navigate folders is using the **View Folder** list.

The folders listed will be related to the main folder you are navigating within. For example, if you are viewing the Inbox, you will see folders that are listed under the Inbox, while if you are viewing Track Sent, you will see folders listed under Track Sent.

The All Folders option will show all messages in all folders that are in the dropdown list.

Managing Messages

Each message line has a checkbox next to it. You can use this checkbox to select messages to delete or move to a new folder. Checking multiple messages will select them all for the action you specify.
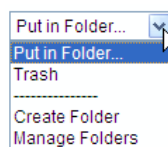
Deleting Messages

To delete a message, check the box next to the message and then click **Delete**.

When you delete, a message it will move the message to the Trash folder. The message remains in the Trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be moved to the Deleted Trash folder. The message remains in the deleted trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be permanently deleted.

NOTE: If a message reaches the end of its expiration period, it will be moved to the Trash folder.

Moving Messages to Another Folder

To move a message to a new folder, check the box next to the message and select the appropriate folder from the "Put in Folder…" dropdown menu.

```
Put in Folder...  ▼
Put in Folder...
Trash
---------------
Create Folder
Manage Folders
```

This will move the checked messages into the selected folder.

SENDING FILES VIA WORKFLOWS

SecureFileTransfer enables you to easily send files in a secure fashion. Your administrator will have setup pre-configured Workflow Names for you to choose from when you upload a file. Using these defined Workflow Names, you are able to upload your files and have them properly routed to their destination without any further interaction.

You can send files via the simple and intuitive DataMotion Portal or via the DataMotion SFTP Server. The delivery once the file has been uploaded is identical and does not depend on how you send the file.
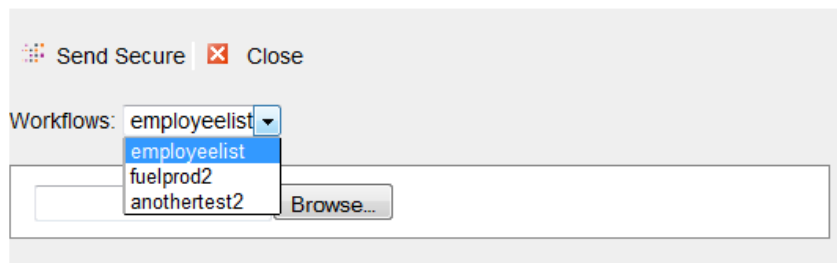
SENDING FILES USING THE DATAMOTION PORTAL

To submit a file for delivery from the DataMotion Portal:

1. Open your web browser to the DataMotion Portal.

2. From the Member Center, click **Upload Workflow** on either the top menu bar or under Transfers.
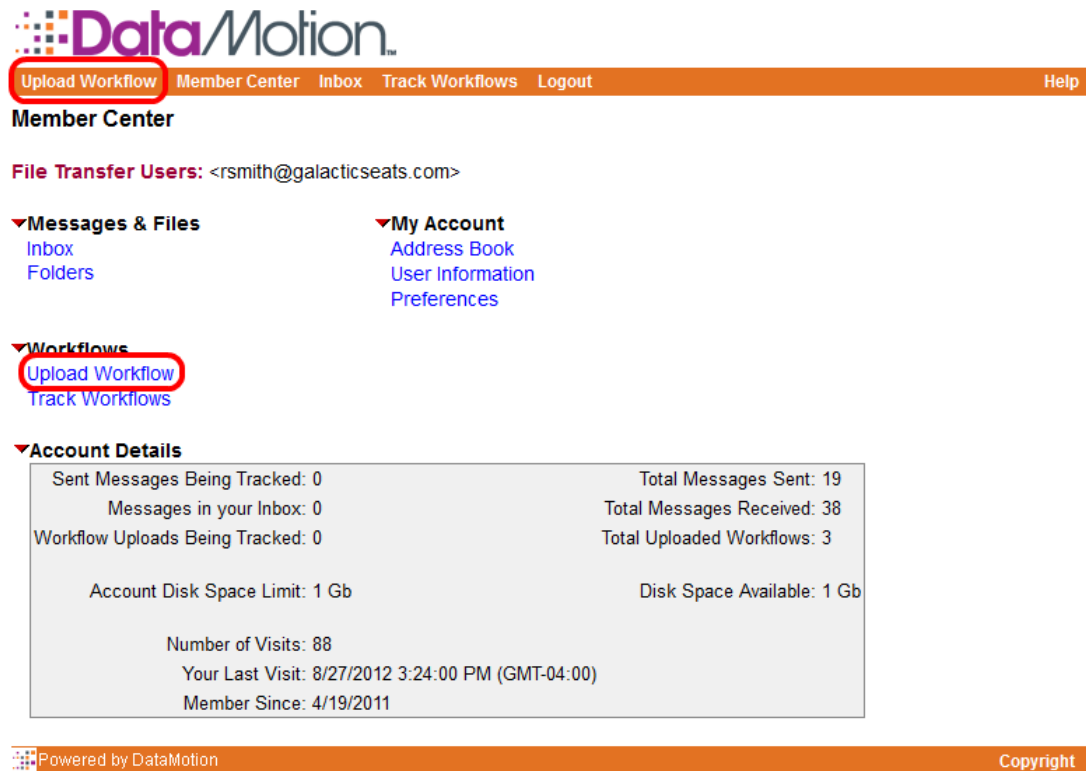
This displays the **Upload Workflow** window.

3. Choose the **Business File Name** you are going to send from the drop down menu.

4. The **Browse** dialog allows you to upload your file.

   NOTE: Only one file can be submitted at a time. There is no limit as to the number of times you can submit a Business File.

5. Click **Send Secure** to send the file.

The file will now be uploaded and delivered according to the Business File Name rules.

SENDING FILES USING THE DATAMOTION SFTP SERVER

To submit a file for delivery using the DataMotion SFTP Server:

NOTE: The WinSCP client is shown here as an example of an interactive SFTP client. It is possible to use scripts with this and other clients to upload your files.

1. Open your SFTP client program.
2. Enter the following information to connect to the DataMotion SFTP Server:
    »   Host name: ssl.datamotion.com
    »   Port number: 22
    »   User name: UserID or email address
    »   Password: DataMotion SecureMail account password
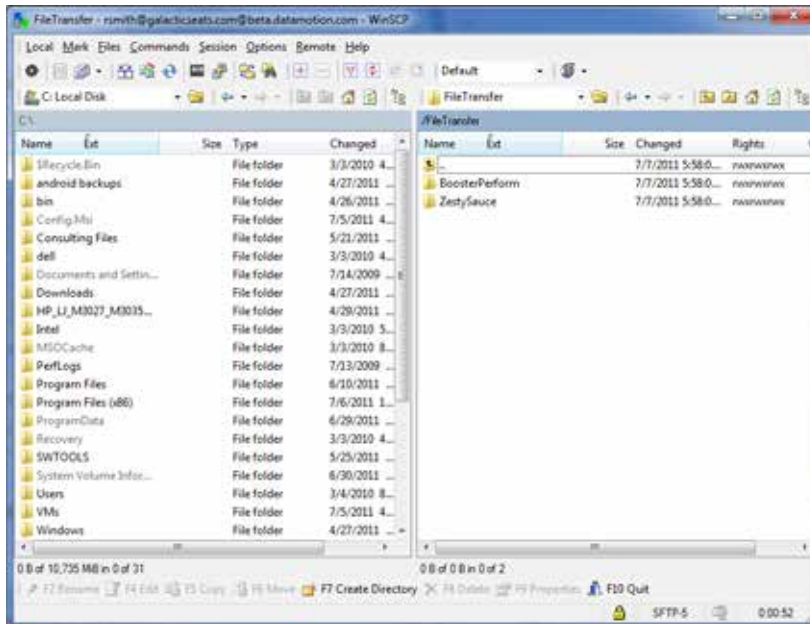   »   Protocol: SFTP
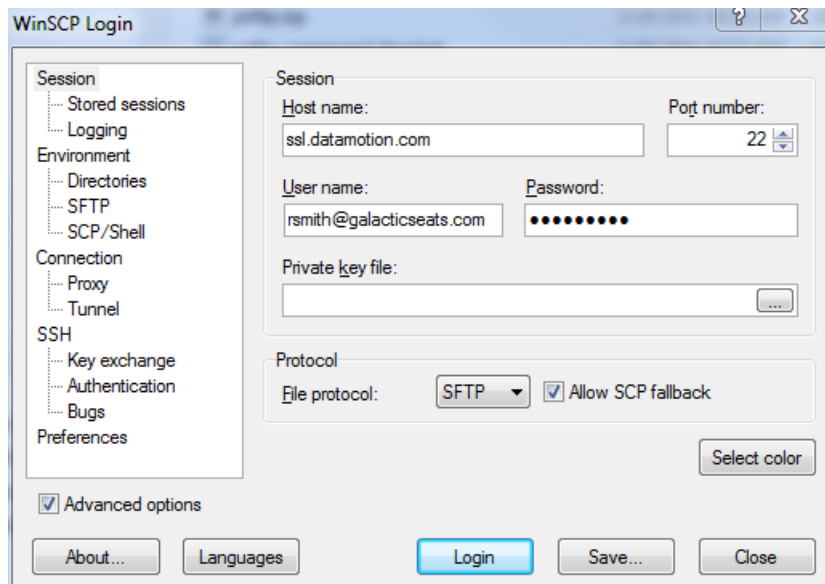

3. Click **Login** to start the SFTP session.
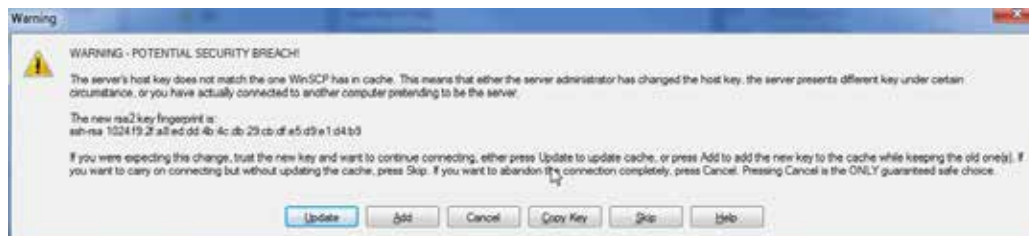
4. Click **Add** to accept the server host key since this is the first time you are connecting. You will not be prompted again if you add this key.
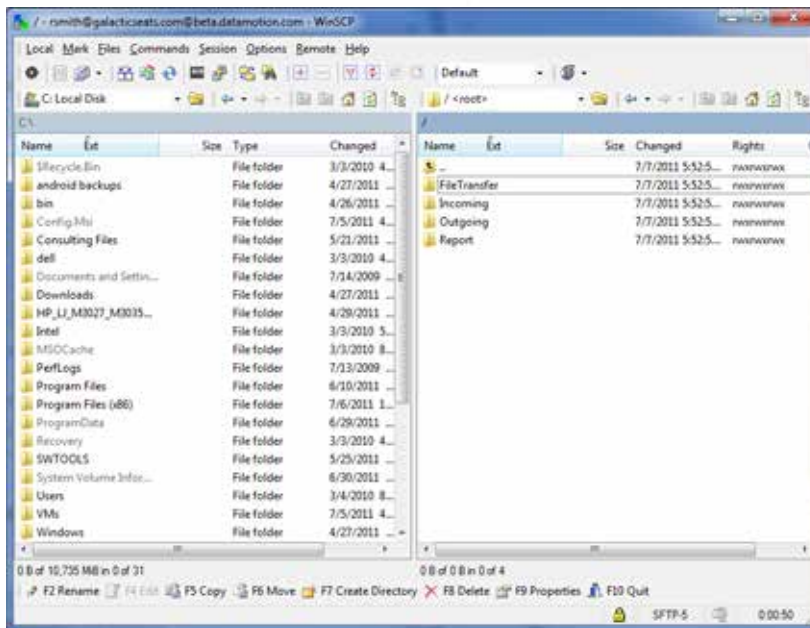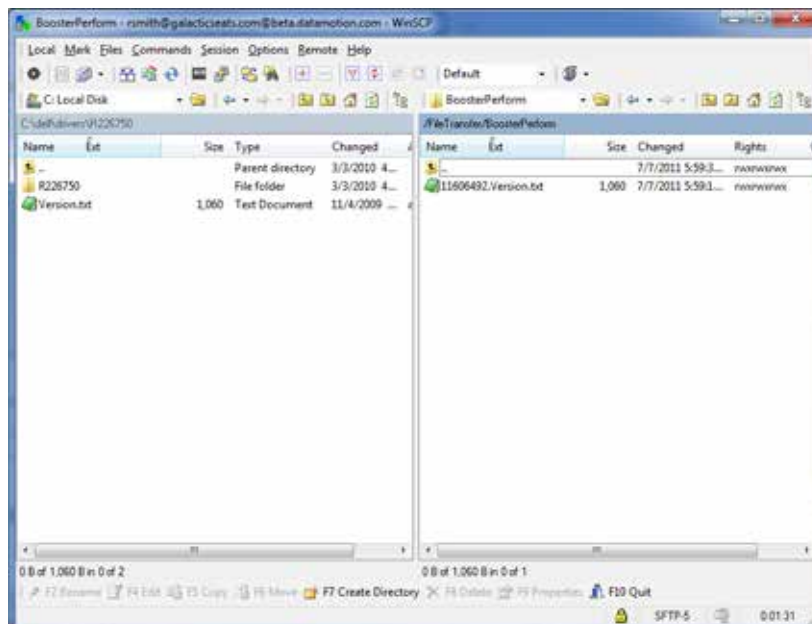
5.   Open the **FileTransfer** folder on the DataMotion SFTP Server.

6. Inside the **FileTransfer** folder each Business File Name associated with your user account is listed. Open the folder with the Business File Name for which you are uploading a file.
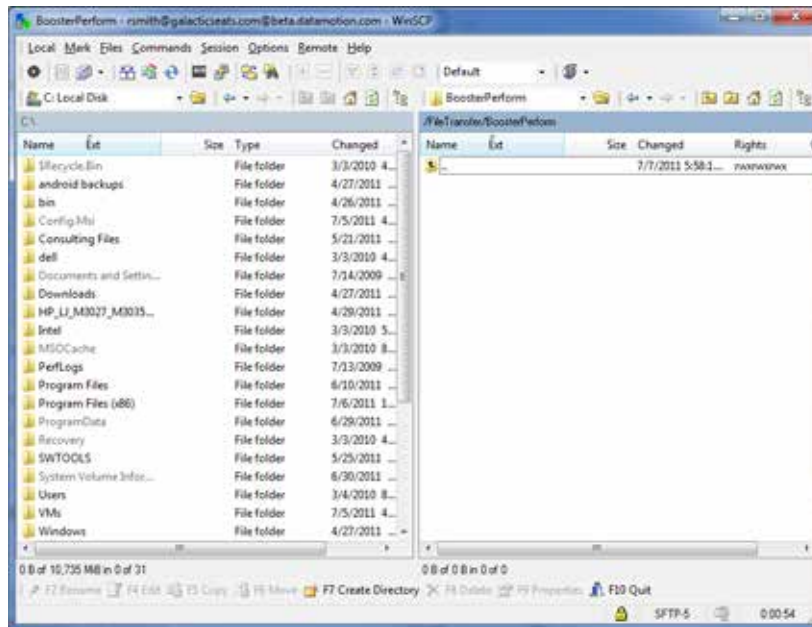
7. Drag the file you want to upload into the Business File Name folder.

8. Once the file has been uploaded, you are done.

When the file is uploaded it will be automatically renamed. The new name will have a unique number prepended to be beginning to ensure uniqueness of all files that are uploaded. Once the file has been passed on to the destination, it will be deleted from the folder.

TRACKING WORKFLOWS

Once you have submitted a file you can review the status of the submission through the Track Workflows page. The status of any submitted file can be tracked here regardless of how it was submitted.

To view the tracking information for a file:

1. Click **Track Workflows** on the menu bar or in the Member Center.

			Page Size 10 ▾	
ID	**Date**	**Business File Name**	**Status**	**Size**
11606562	10/7/2011 9:00:20 AM (GMT-04:00)	ZestySauce	Enroute	153 b

2. The Status column will show the status of the file.

Once the file has been delivered the status will change from **Enroute** to **Delivered**.

|			Page Size 10 ▾	
ID	**Date**	**Business File Name**	**Status**	**Size**
11606564	10/7/2011 10:48:58 AM (GMT-04:00)	BoosterPerform	Delivered	1 Kb
11606563	10/7/2011 9:58:53 AM (GMT-04:00)	BoosterPerform	Delivered	1 Kb
11606562	10/7/2011 9:00:20 AM (GMT-04:00)	ZestySauce	Delivered	153 b

RECEIVING FILES

OVERVIEW

When a new file is sent to you, the file can be retrieved in the same manner they can be sent, either through the DataMotion Portal or the DataMotion SFTP Server. The file is available through both access points at the same time and can be downloaded through either method.

DOWNLOADING FILES VIA THE DATAMOTION PORTAL

New File Notification

When you receive a new file a notification message will be sent to your email address. The message will show the filename of the file you are receiving and contain some information about the sender and instructions to follow to download the file.

To access the file on the server, click the link on the second line. This will open your web browser to the login page.
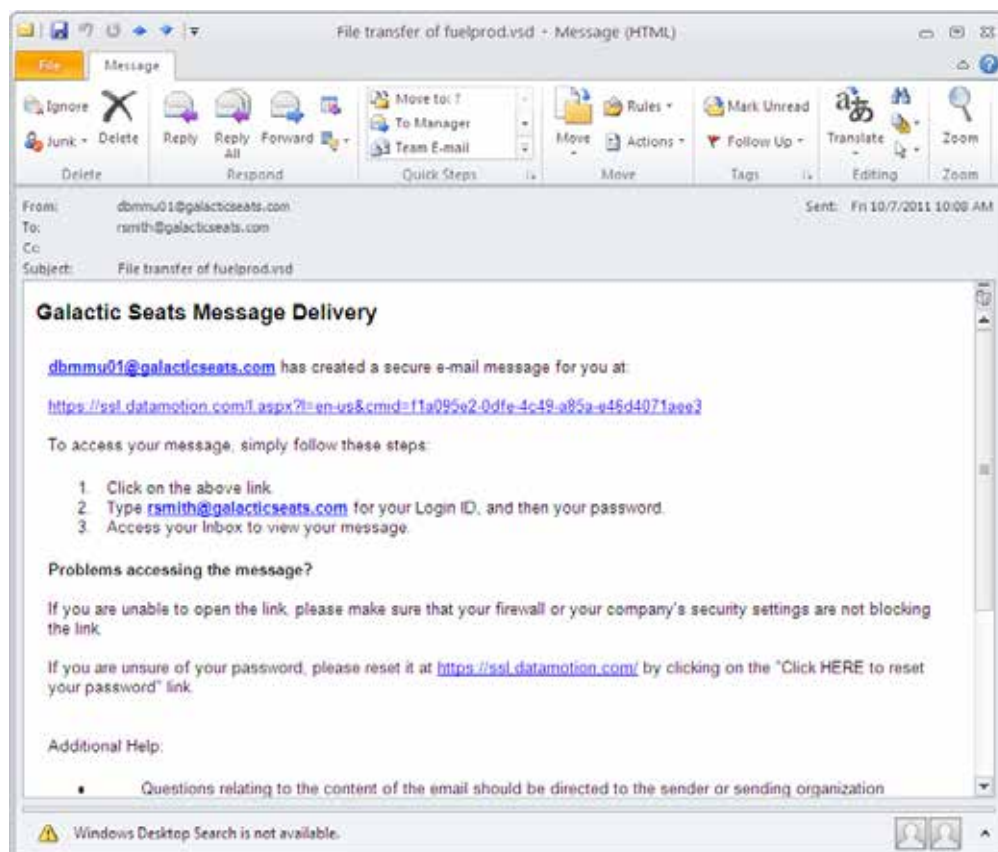
See *Accessing SecureFileTransfer* for information about logging into your account.

NOTE: If you do not want to receive notifications of new file delivery contact your Administrator to turn them off.

Viewing Files in Your Web Portal Inbox

Once you have logged in, if you have new files, you will automatically be taken to the Inbox.

New, unread file messages are highlighted by a NEW tag to the left of the message.

Once opened, a message will no longer display the NEW tag.

To download your file, save the attachment shown in the message.

## DOWNLOADING FILES VIA THE DATAMOTION SFTP SERVER

To download a file sent to you from the DataMotion SFTP Server:

> NOTE: The WinSCP client is shown here as an example of an interactive SFTP client.
> It is possible to use scripts with this and other clients to download your files.

1. Open your SFTP client program.
2. Enter the following information to connect to the DataMotion SFTP Server:
    » Host name: ssl.datamotion.com
    » Port number: 22
    » User name: UserID or email address
    » Password: DataMotion SecureMail account password
    » Protocol: SFTP
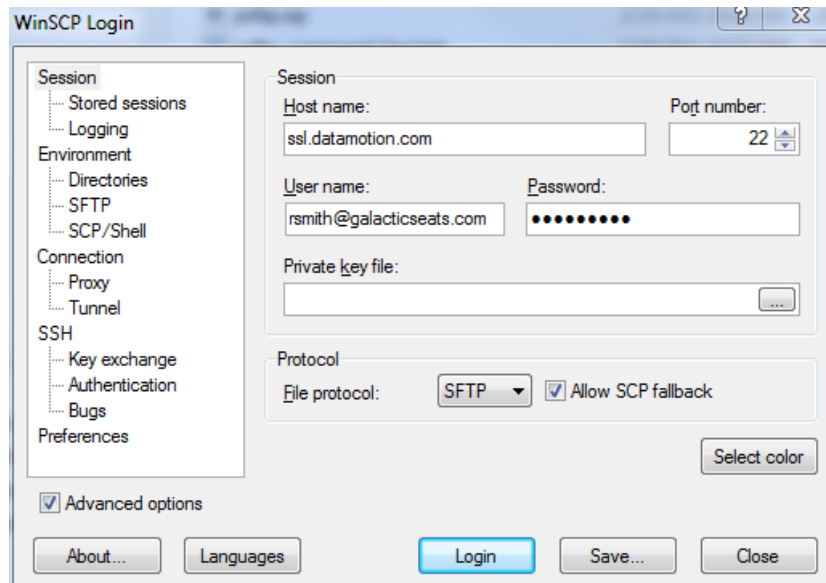
3. Click **Login** to start the SFTP session.
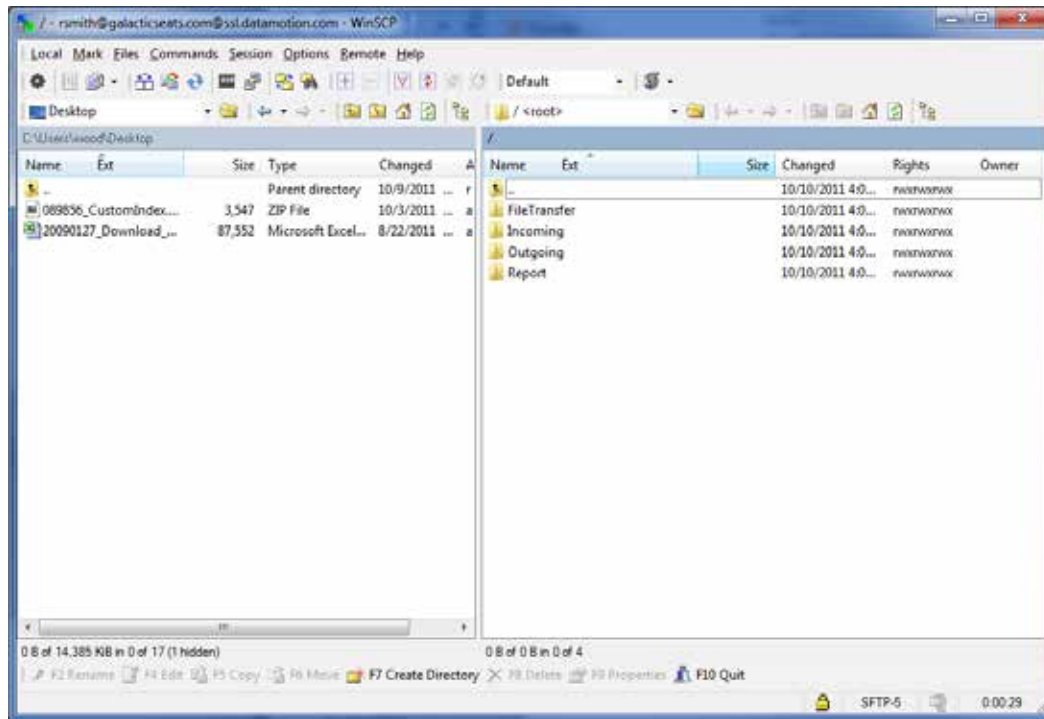
4. Open the **Incoming** folder on the DataMotion SFTP Server.
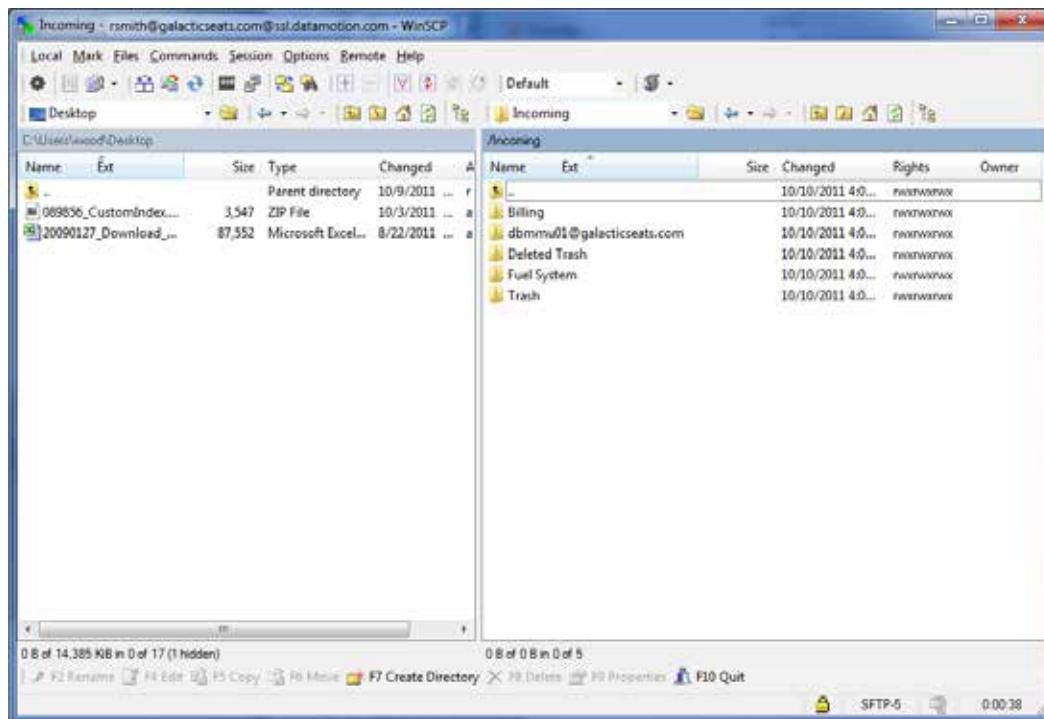
Inside the **Incoming** folder you will see a list of email addresses that have sent files (or messages) to you. Your administrator will provide you with an email address which is used to send files to you. It is possible that you may have more than one email address that can send files to you. This will be the same email address that the notification message was sent from.

5. Open the folder with the specified email address.
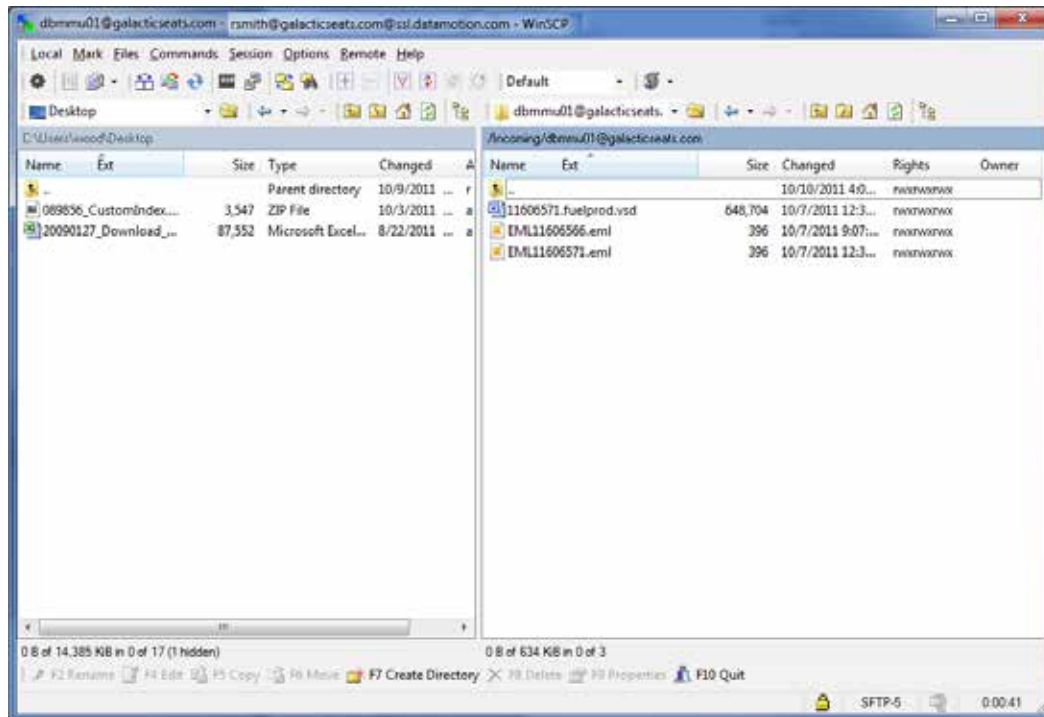
6. Find the file you are looking for and download it to your computer.

NOTE: Sorting the files by date will help determine the most recent files that have been sent to you.

7. Once the file has been downloaded, you are done.

All files sent to you are stored with unique filenames. A numeric code will be prepended to the name of any file sent to you to ensure uniqueness. To restore the original filename remove the characters to the first ".". For example, to restore the file "12345678.filename.txt" to its original name, remove the "12345678." from the name.

*   *   *

This represents the end of the *DataMotion SecureMail User Guide.*