DataMotion Direct Messaging Portal Administration Guide

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REVISION HISTORY

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

Version 1

New version of this document due to major changes primarily resulting from the release of the DataMotion Direct Provisioning Portal (DPP).

The DPP is the new self-service portal that is used for all user administration. The user administration features previously available in the Direct Messaging Portal (DMP) have been superseded by the DPP, which also provides additional provisioning features and capabilities. The DPP is documented in the *DataMotion Direct Provisioning Portal Administration Guide* (050041).

This new *DataMotion Direct Messaging Portal Administration Guide* is based on content from the previously published *DataMotion Direct Administration Guide* (050005-04). Sections and content that were retained, such as those on Company Administration Overview, Cobranding, and Reports, have remained mostly the same. Sections that are no longer applicable have been deleted. Because the changes are significant, a detailed description and helpful guidelines can be found in *Appendix A: Changes to Administration Functions and Documentation from the DPP Introduction*.

About This Publication

ABOUT DATAMOTION DIRECT

This publication describes how to manage DataMotion Direct.

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

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

INTENDED AUDIENCE

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

Additional technical documentation, as well as user documentation, is also available from DataMotion. See *DataMotion Documentation* (on page 10).

DATAMOTION DIRECT CONNECTIVITY AND FLOW OVERVIEW

The following **DataMotion Direct Connectivity Diagram** shows some of the connectivity options for the DataMotion Direct platform.

DataMotion Direct Connectivity Diagram

Direct Mailbox Data Stored with AES Encryption

MTA

Secure Web Services

HTTPS Secure Portal Web Calls/API

Direct Implementation

POP Service

End users accessing via SMTP go through the MTA Gateway.

End Users utilizing XD* Access through the Direct Implementation

End Users accessing via POP traverse via the POP service which translates AES to TLS

SMTP / TLS

POP / TLS

End User
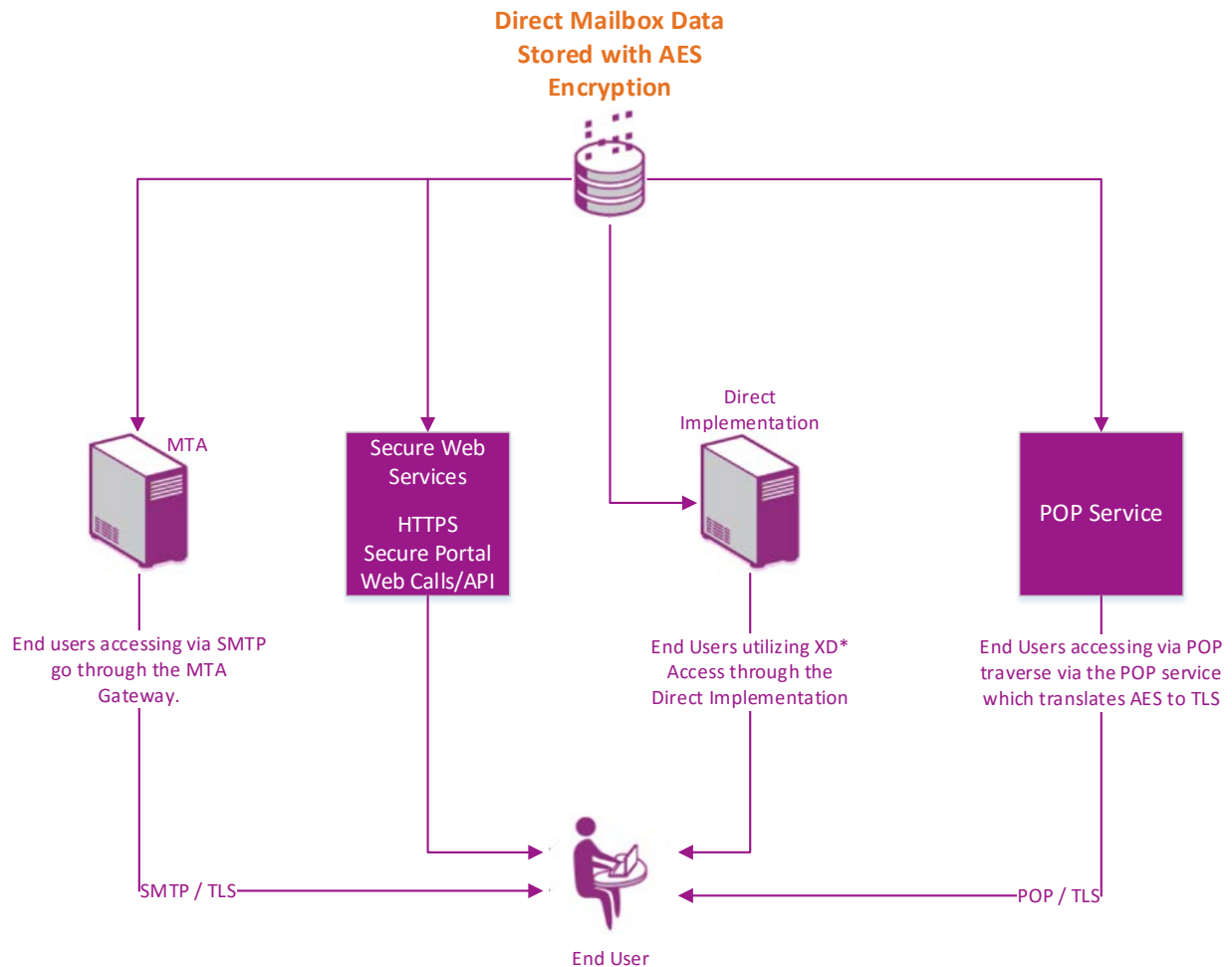
It is not necessary to understand or be familiar with the technologies described in the diagram in order to perform administrative functions on the web portal. While this may be true, the methods used to connect to DataMotion Direct all rely on different methods of sending and require different setups. This is especially true for XD* connections as DataMotion will have to be notified when this connectivity is required.

PRODUCT TERMINOLOGY

Because the various technology components shown in the *DataMotion Direct Connectivity 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.

Synonyms for User Interface Components

Component	Sometimes Referred to as:
Webmail Portal	Web Portal, Direct Messaging Portal, DMP
Administration Portal	DataMotion Direct Provisioning Portal, DPP

HOW TO USE THIS PUBLICATION

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

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

About This Publication
> Provides an overview of the content of this publication and a description of how to use the publication while performing various tasks.

Chapter 1) DataMotion Direct Company Administration
> Describes how to manage your DataMotion Direct accounts, including how to use the Admin Console tools.

Chapter 2) Cobranding the Web Portal
> Contains information regarding what cobranding is as well as its uses. Also includes information on how to create cobrands via the admin tools.

Chapter 3) User Management
> Short sections on how to view various companies and users contained within the company hierarchy.

Chapter 4) Reports
> Details regarding the reports available on the Direct Messaging Portal. Includes descriptions of every report type and how to run or download them for viewing purposes.

Appendix A: Changes to Administration Functions and Documentation from the DPP Introduction
> Describes the changes in the DataMotion Direct Messaging Portal (DMP) administration

functions due to the introduction of the DataMotion Direct Provisioning Portal (DPP) and DataMotion Direct v6.2. Lists of the administration features that have been moved to the new DPP and the administration features that remain on the DMP, as well as a list of revisions to the administration guide due to these changes are provided as an aid for the transition.

NOTE: The content contained in the Appendix section will be removed in subsequent releases of this document.

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- *DataMotion Direct User Guide* (part # 050003)
  Provides instructions for using the products.

- *DataMotion Direct Provisioning Portal User Guide* (part # 050041)
  Describes the various functions and features of the Direct Provisioning Portal or DPP.

- *DataMotion Direct Software Development Kit Reference Manual* (part # 050029)
  Documents the Application Programming Interfaces (APIs), and system development, maintenance, and administration tools for developers.

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

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DataMotion Direct Company Administration

DATAMOTION DIRECT FEATURE OVERVIEW

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

DATAMOTION DIRECT FEATURES

DataMotion Direct is a highly flexible platform which can provide a variety of secure transport services for your organization. Using DataMotion Direct, your organization will satisfy Meaningful Use requirements and ensure PHI is protected during transit.

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

- Secure message delivery over Direct, satisfying Meaningful Use requirements.
- No software is required by the recipient (although they will require a valid Direct address).
- Web Portal for sending, receiving and tracking messages.
- Customization of the Web Portal with company cobranding for a branded user experience.
- A self-service web portal for administration of users and companies/tenants called the DataMotion Direct Provisioning Portal. This web portal is described in a separate document (for reference see the *DataMotion Documentation* section on page 10).
- Message tracking including when it was delivered and when it was opened.
- Automatic message expiration.
- Consolidated-Clinical Document Architecture (C-CDA) Document Viewer with print feature.
- Address book with Health Provider Directory (HPD) search capability.

DATAMOTION DIRECT MESSAGE FLOW

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

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

1. A Direct User sends a message through the DataMotion Direct service.

2. Before the message is sent, the Direct service determines if the address of the intended recipient is a valid Direct address. The message will not send if the intended recipient does not have a valid Direct address.

3. Assuming the intended recipient has a valid Direct address the message is sent via Direct (utilizing SMTP/SMIME) to the intended recipient.

4. Once this has occurred the original sender will receive an MDN telling them that their message has been delivered successfully.

5. Non-DataMotion Direct recipients will not have to log into the DMP. It is expected that they have their own EHR software or some other method to view Direct messages. Recipients that are also DataMotion Direct customers can use the DMP in order to see the message content if they so desire.

6. Tracking information is recorded when the message is delivered.

7. The sender will receive an MDN indicating that the Direct recipient has read the message if they have opened it.

COMPANY COBRANDING

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

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

See the *Cobranding the Web Portal* chapter on page 16 for detailed information.

DATAMOTION DIRECT COMPANY ADMINISTRATION OVERVIEW

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

> **NOTE: The DMP allows you to view the accounts for your company or organization, and the DPP allows you to manage them.**

For the difference between Company Administration and Multi-Company Administration, see the *DataMotion Direct Administration Levels* section on page 13.

EXAMPLE COMPANY

Throughout this publication, a fictitious, example company called Your Organization is used to illustrate how to perform administration, including cobrand creation, user administration, and report generation. This company, is to be considered a template company for the administrator to use. So wherever "**Your Organization**" is seen, that means their actual company's name would be displayed, and whenever "**@yourorg**" is seen that symbolizes email addresses where their company's domain would be.

DATAMOTION DIRECT ADMINISTRATION LEVELS

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

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

Multi-Company Administration refers to the management of DataMotion Direct for multiple companies or organizations. It requires a higher level of authority to perform Multi-Company Administration. Multi-Company Administration can be performed by any Admin user of a company that has sub-tenant companies provisioned beneath itself in the hierarchy. This is typical of larger healthcare providers or resellers that possess Direct domains of their own. This central "landlord" company manages the DataMotion Direct accounts for the "tenant" companies or organizations it serves. In DataMotion Direct administration, the landlord company is also known as the **Default Company**.

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

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

Administrators can view users within their own company, and if a company hierarchy exists, they can also view users for tenant companies.

DataMotion Company Hierarchy Flow

DataMotion SaaS
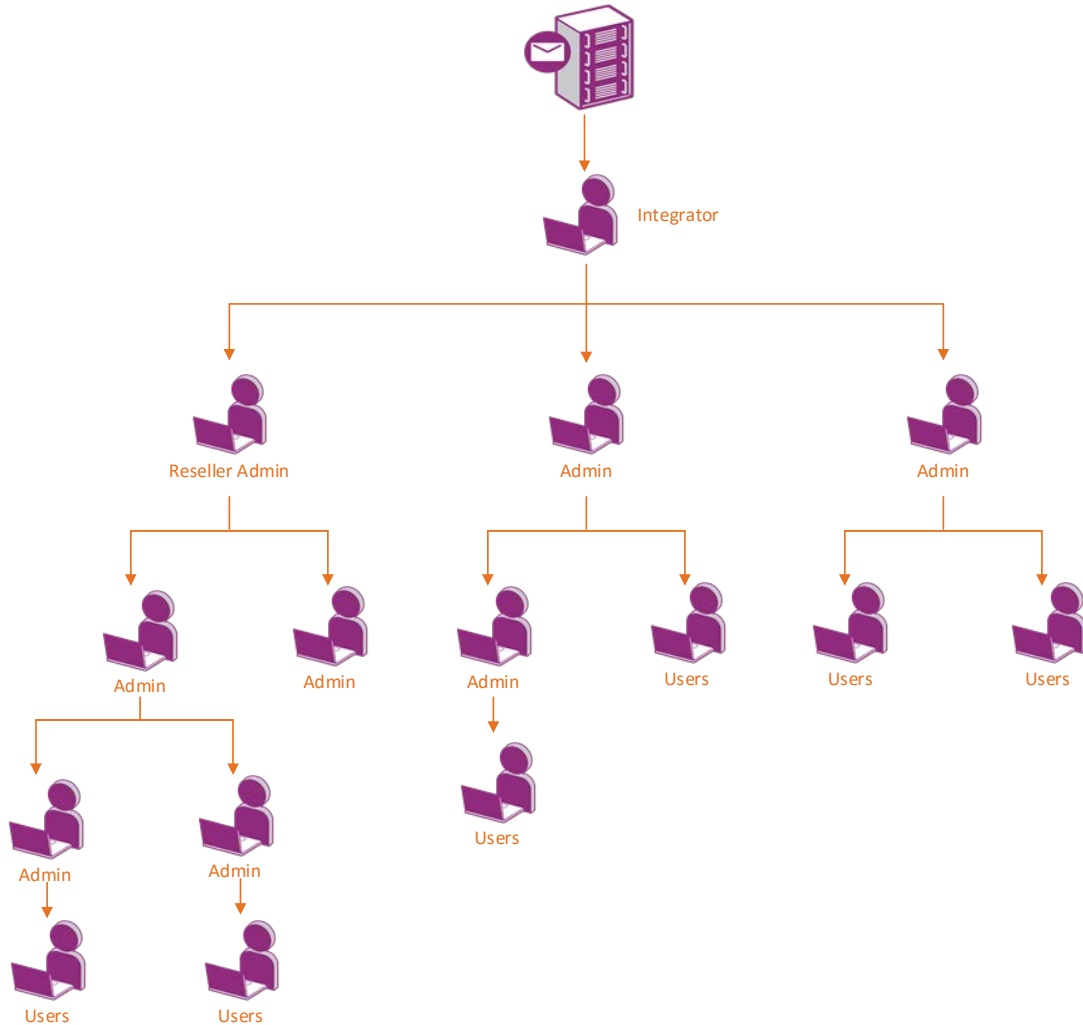
USER TYPES AND PRIVILEGES

DataMotion Direct Company Administration is primarily focused on user administration performed via the Direct Provisioning Portal. The **User Type** is how privileges, permissions, capabilities, and configurations are assigned On the Direct Messaging Portal there will only be two User Types within a company which are as follows:

NOTE: All User Types are automatically assigned upon provisioning a user via the DataMotion Direct Provisioning Portal.

■ **Certified Gold Admin**: This User Type will have all cobranding and reporting capabilities described throughout this document. Any users who belong to this User Type can also view all of the users within a particular company or tenant depending on where they are located in the hierarchy.

- **Direct User**: This User Type is the standard user type for all users who do not have any administrative capabilities.

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

ADMINISTRATIVE TOOLS

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

Member Center

Administrator: <jsmith@yourorg.com>

▼Messages & Files	▼My Account	▼Admin Console
Compose	Address Book	Administrative Tools
Track Sent	User Information	
Inbox	Preferences	
Group Inboxes	Group Mailbox Configuration	
Drafts		
Folders		

The Administrative Tools will always be available for the Admin.

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Cobranding the Web Portal

WHAT IS COMPANY COBRANDING?

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

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

Example of a DataMotion Branded Web Portal Login

WHO SETS UP A COBRAND?

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

COBRANDING FEATURES

Cobranding features include the following:

- You can specify an **Image** (usually an organization or company logo) that will be displayed at the top of all portal pages.

- You can specify a **Hyperlink** that will be used if users click on the image.

- You can specify a **Custom Color** that will be used for common style elements on web pages, such as the login panel on the login screen, and the top menu bar and bottom status bar common to the portal pages.

- You can insert **HTML Coding** to be used in place of the image and accomplish advanced cobranding customization. The HTML can contain text, links, graphics, and columns and follow an HTML style sheet.

- You can control how long to **Allow users to stay signed in** (days, hours, minutes) without activity.

- You can specify whether to **Filter Messages**, which allows you to limit the messages that users see in their mailbox to the messages related to the cobranded company. It is primarily used to add another level of cobranding to the **recipient** experience. With cobranded message filtering, the DataMotion Direct recipient's mailbox will display only

those messages from or to the cobranded company as long as the recipient accesses the portal using the notification message link.

CREATING A COMPANY COBRAND

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

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

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

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

4. In the first field (which is a drop down list), select **(Create a New Cobrand)**.

5. Fill in the applicable cobrand fields according to the information that follows:

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

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

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

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

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

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

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

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

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

(The page header is probably the most important element in the cobranding design, and either the **Top HTML** method or the **Select Image** method should be used to

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Cobranding the Web Portal

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

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

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

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

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

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

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

Note that the recipient cobrand experience will take priority over the sender cobrand

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

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

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

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

The following example shows the cobrand saved and applied.

The creation of your cobrand is complete.

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

» When you **select** a cobrand, it immediately displays the color scheme on the cobrand page.

» Once the cobrand information appears, you may edit it if desired, or click **Quick View** to display the selected cobrand, including the image or Top HTML in the page header. (The Quick View button is used to apply the selected cobrand to the browser/portal session until another Quick View or Save overrides it or until you leave the website.)

» After you have made any changes to the cobrand, click **Save** to Save/Apply the cobrand.

» If you want to view the <Default> company cobrand, select the <Default> company from the drop-down list, and then click **Quick View**. If you want to return to using the <Default> company cobrand for this company (i.e., set the company to use the default cobrand), select the <Default> company from the drop-down list, and then click **Save**.

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

This concludes the information on Cobranding.

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User Management

To provide users with access to DataMotion Direct, you need to create accounts and have them assigned to the proper User Type (these functions however are performed via the DataMotion Direct Provisioning Portal which will automatically assign the User Type). The administrative functionality available on this web portal (geared towards users) is read-only based and no changes can be made against user settings/information. The following sections describe how you can view the users provisioned to one of your companies by accessing the Corporate Licenses page.

ACCESSING THE CORPORATE LICENSES PAGE

The Corporate Licenses page contains a simple list showing every company that has been provisioned by the DPP for your account. Every company will be listed in alphabetical order and the total number of companies will be shown at the top left next to the Account text. The Corporate Licenses page can be accessed by performed the following steps:

1. Login to the DMP and access the Member Center if you are not directed there initially.
2. Access the Administration Console via the **Administrative Tools** link.

Member Center

Administrator: <jsmith@yourorg.com>

▼Messages & Files
Compose
Track Sent
Inbox
Group Inboxes
Drafts
Folders

▼My Account
Address Book
User Information
Preferences
Group Mailbox Configuration
SecureContact.me

▼Admin Console
Administrative Tools

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

Administration Console

▾Corporate Account Management
Administer your corporate accounts.

▾Company Settings
Cobrand Management Console

▾Reports
Group Mailbox Access report
Message tracking report
User logon report
User reports by message size, volume, date and summary
TotalView report

Powered by DataMotion   Terms of Service   BAA   Copyright

4. The **Corporate Licenses** page will look like the following:

Corporate Licenses

12	Account
	AcuteCare Hospital Test
	AdminTest
	Ambulatory Test
	DataMotion Direct Beta Test
	Hospital Test
	My Town Hospital
	Organization Name
	PostInstall Test
	Test Company
	TestAdmin
	TestParent3
	TestParent4

Close

5. From here the **View Users** page can be accessed by clicking on the 🖾 icon or you can return to the **Administration Console** page by clicking the **Close** link.

VIEWING YOUR USERS

When you first open the View Users page you may only see your own account listed. In order to locate other users refer to the *Finding your Users* section.

View Users - (Default Company)
Total Licenses: 100000 Licenses Used: 14   Search [_____] in [All Users ▾] [Go]

14 Direct Messaging Address	Login ID	First Name	Last Name	Created	Last Notice	Last Login	Sent	Rec.	Used
✉ jsmith@yourorg.com				3/30/2016				0	1 <1 Kb
✉ kwilliams@yourorg.com				3/30/2016	0		0 <1 Kb		
✉ mjohnson@yourorg.com				3/30/2016			0	0 <1 Kb	

Close

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

The Close link at the bottom will return to the **Administration Console** page.

Finding your Users

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

Search[   ] in [Select a User Type... ▼] [Go]

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

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

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Reports

DataMotion Direct provides Administrators with a range of usage reports they can use to monitor and track how services are being used. All reports are accessed from the Administration Console. Every type of report can also be downloaded in addition to generating them through the website.

REPORT GENERATION FILTERING INTERFACE

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

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

The % symbol is used as a wildcard for this field. It can be placed anywhere in the string to provide flexibility in matching. For example, searching for "ke%" would return results beginning with the letters "ke", such as kevinm@stage.direct.com.

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

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

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

GROUP MAILBOX ACCESS REPORT

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

To generate a Group Mailbox Access Report:

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

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

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

MESSAGE TRACKING REPORT

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

To generate a Message Tracking Report:

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

Message Tracking Report

E-mail Address or Pattern: [   ]
Start Date: [   ]
End Date: [   ]
To / From: [From ▾]
Generate Report   Download Report   Close

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

Message Tracking Report

E-mail Address or Pattern: [ke%   ]
Start Date: [9/1/2014   ]
End Date: [9/30/2014   ]
To / From: [From ▾]
Generate Report   Download Report   Close

3. Click the Generate Report link.

DataMotion SecureMail Server Report
Message Tracking Detail - Email: ke%
Between 9/1/2014 12:00:00 AM (UTC-05:00) and 9/30/2014 11:59:59 PM (UTC-05:00)

Report Generated On: 10/24/2014 3:55:58 PM (UTC-05:00)   Number of Records: 5

ID	Date	FromEmail	ToEmail	Subject	NumTo	NumRead	MsgSize
54715	9/26/2014 4:20:22 PM (UTC-05:00)	kevinm5@stage.direct.dmhisp.com	kevinm4@stage.direct.dmhisp.com	test	1	1	74 b
54716	9/26/2014 4:23:26 PM (UTC-05:00)	kevinm4@stage.direct.dmhisp.com	kevinm5@stage.direct.dmhisp.com	test	1	1	74 b
54717	9/26/2014 4:26:02 PM (UTC-05:00)	kevinm5@stage.direct.dmhisp.com	kevinm4@stage.direct.dmhisp.com	RE: test	1	1	337 b
54718	9/26/2014 4:30:22 PM (UTC-05:00)	kevinm5@stage.direct.dmhisp.com	kevinm4@stage.direct.dmhisp.com	testadsf	1	1	82 b
54720	9/26/2014 5:41:38 PM (UTC-05:00)	kevinm2@stage.direct.dmhisp.com	kylec2@stage.direct.dmhisp.com	mobile test	1	0	76 b

The report displays all the messages matching the specified criteria.

USER LOGON REPORT

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

To generate a User Logon Report:

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

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

3. Click the Generate Report link.

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

USER REPORTS

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

The following types of reports can be seen:

Report Type	Description
Message Size Statistics	Shows the size of messages sent and received by each user.
Message Date Statistics	Shows when messages have been sent by the users (first and last messages for each user).
Message Volume Statistics	Shows the number of messages sent/received by the user.
Message Summary Data	Shows the fields of the other statistics reports on one screen.

To access any User Report:

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

User Reports   Back to Admin Console

▼ **Message Size Statistics**   ▼ **Message Date Statistics**
Sent by each user   View   Download   Sent by each user   View   Download
Received by each user   View   Download   Received by each user   View   Download
Complete statistics by user View   Download   Complete statistics by user View   Download

▼ **Message Volume Statistics**   ▼ **Message Summary Data**
Sent by each user   View   Download   Sent by each user   View   Download
Received by each user   View   Download   Received by each user   View   Download
Complete statistics by user View   Download   Complete statistics by user View   Download

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

Back to Reports

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

Number of Records: 4

Report Generated On: 10/27/2014 12:42:26 PM (UTC-05:00)

Email	#Sent	Total Size Sent	Avg. Size Sent	Max. Size Sent
kevinm2@stage.direct.dmhisp.com	1	76	76	76
kevinm4@stage.direct.dmhisp.com	1	74	74	74
kevinm5@stage.direct.dmhisp.com	3	493	164	337
kylec2@stage.direct.dmhisp.com	1	93	93	93

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TOTALVIEW REPORT

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

The TotalView report includes the following fields:

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

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

To generate a TotalView Report:

1. Click the TotalView Report link.

TotalViews Report
Please select a start and end date and click Generate Report.

Start Date: 9/1/2014

End Date: 10/27/2014

Generate report   Select the last day / 30 days / 60 days   Close

2. Specify the Date range for the report.

   » There are quick options for the last **day**, **30 days**, and **60 days** below the standard Date fields. These will automatically select the specified time period.

3. Click the Generate Report link.

TotalViews Report
Please select Download Report.

Start Date:	9/1/2014
End Date:	10/27/2014

Download Report   Select Different Dates

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

Appendix A: Changes to Administration Functions and Documentation from the DPP Introduction

The release of DataMotion Direct version 6.2 marks a significant change in the functionality of the Direct system as a whole and how all customers will administer their users and companies moving forward. These changes are brought about by the release of the new self-service administration portal called the DataMotion Direct Provisioning Portal (DPP). Moving forward almost all company and user administration will be performed from this new web portal. This is a groundbreaking change for DataMotion and its customers, as it is now possible for customers to set up their own companies, as well as perform domain and certificate requests on their own instead of having to send in a support request to DataMotion Support.

Some administrative functions are still performed using the DataMotion Direct Messaging Portal (DMP) and some have been moved to the new DPP. The following topics provide information to aid with this transition:

- *DataMotion Direct Messaging Portal Administration Features* (on page 37)

- *Administration Features Moved to the DataMotion Direct Provisioning Portal* (on page 38)

- *New Administration Features on the DataMotion Direct Provisioning Portal* (on page 38)

- *Revisions Between the Old and New Administration Guides* (on page 39)

DATAMOTION DIRECT MESSAGING PORTAL ADMINISTRATION FEATURES

The following lists identify administration features that can be performed on the DMP.

RETAINED FEATURES

Company Cobranding

NOTE: Cobranding can only be managed through the DMP.

Company cobranding is still available via the original methods on the DMP. The sections that correspond to what cobranding is and how to create a cobrand for a company are listed below.

- *Cobranding the Web Portal*
- *What is Company Cobranding?*
- *Who Sets up a Cobrand?*
- *Cobranding Features*
- *Creating a Company Cobrand*

Viewing Users

NOTE: Viewing Users can also be done in the DPP.

The capability to see all the users within a company is still available via the Admin Console on the DMP. This feature however is limited to only being able to view the users, it is no longer possible to perform any other actions. The sections regarding this feature are as follows:

- *User Management*
- *Accessing the Corporate Licenses Page*
- *Viewing Your Users*
- *Finding your Users*

Reports

NOTE: All DMP reports can also be run in the DPP (which has additional reports as well).

The majority of the reporting features have been retained for use on the DMP for convenience. The reports themselves include the same information as previous releases and the user interfaces for them on the DMP are the same. Sections regarding the reports are as follows:

- *Reports*
- *Report Generation Filtering Interface*

- *Group Mailbox Access Report*
- *Message Tracking Report*
- *User Logon Report*
- *User Reports*
- *TotalView Report*

ADMINISTRATION FEATURES MOVED TO THE DATAMOTION DIRECT PROVISIONING PORTAL

Many of the features previously available on the Direct Messaging Portal (DMP) for company and user administration have been moved to the DPP.

The following list identifies features that have been moved to the DPP.

- Adding Users
  » Includes regular and admin users
- Deleting Users
- Editing Users

NEW ADMINISTRATION FEATURES ON THE DATAMOTION DIRECT PROVISIONING PORTAL

The following list identifies new features that have been introduced in the DPP.

- Adding Domains
- Deleting Domains
- Certificate Requests
- Revoking Certificates
- Adding Trusted Agent Users
- Adding Companies
- Editing Companies
- Deleting Companies
- New Reports
  » ONC Reports
  » Certificate Report

REVISIONS BETWEEN THE OLD AND NEW *ADMINISTRATION GUIDES*

This section highlights all of the changes that have been made between the old *DatatMotion Direct Administration Guide* (050005-04) and the new *DataMotion Direct Messaging Portal Administration Guide* (050040-01) as a result of introducing the DataMotion Direct Provisioning Portal. This information is provided to help you understand these recent changes and will be removed from subsequent versions of this document.

NOTE: Separated the sections contained within Chapter 1 into their own chapters.

Chapter 1) DataMotion Direct Company Administration

- *Form Tracking Report* – This section has been removed from the document as the SecureForms feature does not apply to DataMotion Direct.

- *Company Configuration* – This section has been removed from the document as the settings described within the section can no longer be accessed.

- *Challenge Questions for Password Recovery* – This section has been removed from the document as the feature itself has been disabled. All subsequent sections regarding this feature have also been removed which include the following:

  » Overview

  » Challenge Questions

  » Adding Customer Challenge Questions

  » Changing Custom Question Visibility

- *SecureContact.me* – This section has been removed from the document as the feature itself cannot be used DataMotion Direct.

- *DataMotion Direct Message Flow* (on page 12): The flow described within this section has been altered to fit the most up-to-date flow for sending Direct Messages.

- *Manage Users Page* – This section has been renamed to *Viewing Your Users* (on page 26).

- *Viewing/Editing User Accounts* – This section has been removed as the feature is no longer available on the DMP.

- *Adding New Users* – This section has been removed as the feature is no longer available on the DMP.

- *Moving Existing Users* – This section has been removed as the feature is no longer available on the DMP.

- *Password Management* – This section has been removed as the feature is no longer available on the DMP.

- *Bulk User Import* – This section has been removed as the feature is no longer available on the DMP.

- *Deleting User Accounts* – This section has been removed as the feature is no longer available on the DMP.

- *TotalView Report* (on page 34): Added Custom ID and Attachment Size to the list of fields contained in the Total View report.

Chapter 2) DataMotion Direct Integration with Typical Environments

- This entire chapter has been removed from the document as it does not apply to the DataMotion Direct product.

- The sections removed from the document that belonged to this chapter are as follows:
  - » DataMotion Direct Integration with Typical Environments
  - » SendSecure Button for Microsoft Outlook: Group Policy Network Installation
  - » Overview
  - » Step-by-Step Procedure
  - » SendSecure Button for Microsoft Outlook: Installation with Citrix/Terminal Services
  - » SendSecure Button for Lotus Notes: Installation
  - » Overview
  - » Key Aspects
  - » Installation Instructions
  - » DataMotion Direct Button Options
  - » Redirection Description
  - » Tagging Description
  - » Adding the DataMotion Direct LotusScript to your Mail Template

Chapter 3) SecureForms Standard

- This entire chapter has also been removed from the document as it does not apply to the DataMotion Direct product.

- The sections removed from the document that belonged to this chapter are as follows:
  - » SecureForms Standard
  - » SecureForms Standard Overview
  - » Types of SecureForms
  - » SecureForms PDF
  - » SecureForms Web
  - » Creating SecureForms
  - » Technical Requirements
  - » SecureForms Architecture
  - » Workflow Integration
  - » SecureForms PDF Creation Instructions

- » Sample Submit Button in Adobe Acrobat Professional
- » Form Field Name Restrictions
- » SecureForms Web Creation Instructions
- » HTML SecureForm Creation
- » Field Validation
- » Guidelines
- » Accessing SecureForm Data

*   *   *

This concludes the *DataMotion Direct Messaging Portal Administration Guide*.