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BEFORE YOU BEGIN

The DataMotion SecureMail application is an intuitive and easy-to-use application that enables you to engage in secure email communications with any number of recipients. SecureMail provides multiple layers of additional security, so you can be confident your messages will not be eavesdropped, hijacked, or hacked, and that only the intended recipients will see them. SecureMail also enables your recipients to reply to your messages in equally-secure fashion.

About This User Manual

This manual provides a detailed introduction to the SecureMail application. While the application is easy to interpret and use, it may nevertheless be helpful for you to familiarize yourself with its contents and shorten the learning curve even further.

Audience

This manual is intended for end users of the DataMotion SecureMail Web portal. There are also sections for users who’ve integrated SecureMail into their desktop email applications, and for external recipients of messages sent by SecureMail users.

This document assumes basic experience with Web browsers, such as Internet Explorer or Mozilla FireFox, and desktop email systems such as Microsoft Outlook and Lotus Notes.
Introducing DataMotion SecureMail

Email is an integral part of doing business today. Enhancing the email process does not need to be costly or complicated. DataMotion SecureMail is cost effective, easy to install and quick to implement.

DataMotion SecureMail makes email communication as secure as it is easy. Built on top of DataMotion's Intelligent Information Transport (IIT) platform, it offers flexibility that enables businesses to enjoy the same high-end encryption used by government agencies and large financial and healthcare enterprises.

SecureMail provides an easy way to securely send and track the delivery of confidential e-mail messages. As an end user of SecureMail, this manual explains how to get the most out of its basic and advanced features.

SecureMail is appropriate for businesses of all sizes. Individuals can use the on-demand service and be up and running in almost no time. Larger businesses can choose either the on-demand or on-premises version. Regardless of the option, everyone is up and running with full capabilities in less than a day.

When an e-mail message is sent, it travels across the Internet in plain text, and has about as much security as a postcard.

Establishing a SecureMail Account

Your company's SecureMail administrator establishes your account with the SecureMail system. When your account is established, you will receive an e-mail notification similar to the one below:
This notification contains a link you must click to activate your account. When clicked your Web browser will bring you to the DataMotion secure email Web portal, which will prompt you to create a password to protect your account. Once you’ve created your password, your account enrollment is completed.

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

https://ssl.certifiedmail.com/r.aspx?b=8&e=dave.dev%40gmail.com&p=UJ0U&l=en-us

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.

If you need help, please send an e-mail to support@certifiedmail.com.
Accessing Your Account

As a registered user, all you need to access your account is Internet access and a Web browser.

To access your DataMotion email account

1. Navigate to the DataMotion Web portal site (e.g., https://ssl.datamotion.com).
2. Enter your name and password in the logon window.
3. For convenience, a link to the DataMotion logon window is provided in all DataMotion Delivery Notification messages.
4. Enter your User ID or E-mail address and corresponding password in the logon window.

   **Note**  You can use either upper- or lowercase letters; the long is not case sensitive.

5. Click Enter.

If you have forgotten your password, click **Forgot Password?** and submit your registered e-mail address. Password instructions will be sent to your regular e-mail account.
Once you’ve logged on, if you have any new messages the **Inbox** will display. Otherwise, your personalized DataMotion Member Center will display. From here you can access various other screens and services within the SecureMail system.

**Note** By logging on to DataMotion, the system automatically establishes a secure SSL connection for secure communications.

**Downloading the SendCertified Button**

Depending on how your DataMotion administrator has configured the system, you may have the additional option of downloading a **Send Certified** function that will enable you to send secure email messages directly from your desktop email application (e.g., Microsoft Outlook or Lotus Notes).

**To add a SendCertified button to your desktop email application**

1. Log onto the DataMotion Member Center.
2. Under Download Console, click Client Downloads.
This displays the **Download Console** screen.

6. Click the **Send Certified for...** drop-down button, and select the desktop email application you use.
7. Click **Download Now!**
At the prompt, click **Save File**.

You’re downloading a file called *SendCMv4.exe*. Note where you save this file.

3. When the download completes, locate the *SendCMv4.exe* file and double-click it to launch the installation.
4. When prompted to extract the zipped files, click **Browse** to place them in the directory of your choice (if you wish to change the default location) and click **Unzip**.
5. The Install wizard begins. Click **Next**.

6. When prompted, click **Browse** to select the folder in which you would like to install the SendCertified button files, and click **Next**.
If you’re uncertain about whether you have enough space to install the button, click Disk Cost.

7. When prompted to begin the installation, click Next.
8. When the installation completes, click Close.
9. Open your desktop email application, and create a new email message.
10. You should see a SendCertified button added to the interface.
Sending and Tracking Messages

DataMotion SecureMail enables you easily to send email messages and attachments in highly-secure fashion. It also provides a range of additional security options that traditional email 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

Sending SecureMail Messages

You can send SecureMail messages either via the simple and intuitive DataMotion SecureMail Web interface or through the Send Certified button on your email application (such as Microsoft Outlook or Lotus Notes). Both of these methods are outlined below. In addition, when you’re done composing your message and adding any attachments, you can take advantage of additional message options to make your email correspondence even more secure.

To send a secure message from the Web portal

1. Using your Web browser, log on to your SecureMail account
2. From the DataMotion Member Center, click either New Message (on the top menu bar) or click Create a New Message, under Messages.
This displays the **New Message** window.
3. Enter the e-mail address of the recipient(s) and a subject, as you would with any email. For multiple recipients, separate each additional e-mail address a “,”.

4. Create your message in the Message window.

5. Add any necessary file attachments by clicking Add Attachment below the main message window. You can add multiple attachments of any file type or size.

6. Optionally, click Add Signature if you wish to append a signature at the end of your email.
   - 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 **Account Preferences** section of this user manual for detailed instructions on how to create a signature.

7. Click **Send Secure** when you’re done.

Your recipients will receive an automated message alerting them that a secure email from you awaits them. See the **Receiving Messages** section of this manual for more information on how recipients will receive your SecureMail messages, and how they can respond securely.

**To send a secure message from your email program**

1. Create your message as you normally would.
2. Click **Send Certified**.

As with messages sent from the secure Web portal, your recipients will receive an automated message alerting them that a secure email from you awaits them, and will need to view and respond to the message via the DataMotion secure Web portal.
Viewing Sent Messages
DataMotion SecureMail saves a copy of each message you send, so you can view them at any time.

To view your sent messages:
1. Log onto the DataMotion Member Center.
2. Click Track Sent to display the Track Sent folder.
3. Click the Subject line of the message you wish to view.

All your sent messages are saved in the Track Sent folder by default.

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

To save a draft of your message
1. Click New Message.
2. Begin composing a message.
3. Click Save Draft.

To resume editing a message draft
1. Log onto the DataMotion Member Center.
2. Click Track Sent.
3. Click the View Folder drop-down arrow and select Drafts.
4. When the Drafts folder displays, click the message you wish to continue composing.

5. Apply any additional layers of message security (if desired), and click Send Secure.

**Tracking Sent Messages**

In addition simply to viewing your sent messages, DataMotion SecureMail enables you to find out precisely when your message was delivered and when it was opened. 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 also retract the message (as long as it has not been opened).

To find out when a message has been received and opened

1. Log onto the DataMotion Member Center.
2. Click Track Sent. The Track Sent folder displays.
3. Click the Subject of the message you wish to examine. The View Message window displays. View the information in the Tracking Details section.
a. If you do not see this information, it is hidden. Click **Expand All Tracking Details** to display it.
To retract an unopened message

1. Log onto the DataMotion Member Center.
2. Click Track Sent. The Track Sent folder displays.
3. Check the checkbox next to the message you wish to retract.
4. Click Retract.
The message will remain in your **Track Sent** folder. It will now be listed as **Retracted**.

If you’ve sent a message to multiple recipients, you can also retract the message from every group member who has yet to open it.
To retract an unopened message from multiple recipients

1. Log onto the DataMotion Member Center.
2. Click Track Sent. The Track Sent folder displays.
3. Click the Subject of the message you wish to examine. The View Message window displays.
4. Click Advanced Options.
5. Check the checkbox labeled Retract message from recipients that have not yet opened the message.
6. Click **Update Message**.
Applying Additional Layers of Message Security

When you use the DataMotion secure email Web portal to send your messages, you can opt to apply additional layers of security to each message you send. You can:

- assign a message priority
- arrange for a return receipt
- set a message expiration date
- password protect the message
- prevent the recipient from replying or forwarding your message

To apply an additional layer of security to your message
1. Compose your message and add attachments and a signature, if desired.
2. At the bottom of the message window, click **Show Options**.
This displays the **Options** box.

3. Select the desired option(s).
   a. If you request a return receipt, you will receive an automated alert via regular email when the message recipient has opened your message. You can also use the **Track Sent** feature to keep track of whether a message has been opened.
   b. Messages will be deleted from the secure Web portal when they reach their expiration date. You can set a message to expire in as little as one day or as long as two years. The default expiration length is one month.
   c. If you assign a password to each message as an added layer of security, be certain the message recipient will know the password you assign, and that the hint you provide doesn’t make the password easy to guess. For example, if you know the recipient’s social security number, you can enter that as a nine-digit password, and in the **Hint** field enter “Please provide your social security number to access this message.” The recipient of the message in turn will be required to enter the correct answer in the **Password** field in order to retrieve and read the message.

4. Click **Send Secure** when you’re done to send your message.
Note  In your DataMotion Account Preferences you can set values for message priority, expiration date, and return receipts that will apply by default to every message you send out. You’ll always be able to change those values on an individual message basis in the Show Options section.

To send a secure message from your email program

1. Create your message as you normally would.
2. Click Send Certified.
As with messages sent from the secure Web portal, your recipients will receive an automated message alerting them that a secure email from you awaits them, and will need to view and respond to the message via the DataMotion secure Web portal.
Receiving Messages

In addition to understanding how to view the messages you’ve received in your SecureMail Inbox, it is also important to understand how the messages you sent out are received by their recipients.

**Viewing Messages in Your Inbox**

1. Log onto your DataMotion SecureMail Inbox.
2. Click the **Subject** line of the message you wish to view to display the message contents.
You can also display the contents of new messages by clicking **New** next to each message.

![DataMotion SecureMail User Interface](image)

**Note**  The checkboxes next to each message are for deleting messages or for moving them into another folder. You cannot open a message by checking its corresponding checkbox.

**How Your Message Recipients View Messages They Receive From You**

When you send a DataMotion SecureMail message, your recipient does not receive the message directly. Rather, he receives an automated SecureMail Delivery Notification via e-mail. This email notification alerts the recipient that a SecureMail message from you awaits him.
It also includes a link which, when clicked, brings the recipient to the DataMotion SecureMail Web portal and either prompts her to register or, if she’s already registered, prompts her to log on to his account.
IMPORTANT  To access or respond to your message, your recipients will need to sign up for a free DataMotion recipient user account. These accounts are called **Recipient Accounts**. DataMotion requires discrete recipient accounts to ensure the security of your email communications – to help ensure only the intended recipients read your messages, and to enable message tracking and password-protection.

Recipient accounts are not used for marketing purposes.

Once the recipient is properly authenticated, she is brought to her inbox to view your message.
Recipient users must log on to the DataMotion SecureMail Web portal to view and respond to their messages, just as full users must. Generally speaking, recipient users can perform all of the functions that are available to full SecureMail users, including sending a secure reply to your message or forward your message securely to others.

There are two exceptions to this:

1. You and your DataMotion SecureMail administrator have the ability to prevent your message recipients from replying to or forwarding your messages. You can do this by default for all of your messages, or on a per-message basis. See **Account Preferences** for details on how to do this.

2. Recipient users cannot create their own SecureMail messages.
Recipient users do not have the option to create new messages.
Working with Message Folders

The DataMotion SecureMail Web portal enables you to organize your Inbox and your sent messages into folders in much the same way you would organize messages in your desktop email applications, such as Microsoft Outlook or Lotus Notes.

To create a new Inbox folder

1. Log onto your DataMotion SecureMail Inbox.
2. Click the **Put in Folder** drop-down arrow.

This displays the **Add New Folder** screen.

3. In the **New Folder Name**: field, enter the name you wish to assign to your new folder.
4. Click **Add Folder**.
This new folder is now added to your existing list of SecureMail folders.

To place a message into another folder

1. Log onto your DataMotion SecureMail Inbox.
2. Check the checkbox next to each message you wish to move
3. Click the Put in Folder drop-down arrow.
4. Select the folder into which you wish to place the messages.

The messages will be placed into the folder you designate.

To view messages stored in another folder

1. Log onto your DataMotion SecureMail Inbox.
2. Click the View Folder drop-down arrow.
3. Select the folder you wish to view.
This will display the message list in the folder you selected.

In the same fashion, you can also place Draft messages and Sent messages into different folders. It’s important to keep in mind, however, that each set of messages – messages in your Inbox, in Track Sent, and in Drafts – have their own discrete set of folders. In other words, if you create a new folder in your Inbox, you will not be able to place messages either from Track Sent or from Drafts into that new Inbox folder.
Changing Your Account Preferences

DataMotion SecureMail gives you wide latitude to configure how you receive your messages, how they will look when you receive them, and how they will look to your recipients.

To access your account preferences

1. Click Member Center.
2. Under the My Account section, click Preferences.

This displays the Account Preferences page.
**Account Preferences**

<table>
<thead>
<tr>
<th>Preference</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message priority</td>
<td>Low, Normal, High</td>
</tr>
<tr>
<td>Receive e-mail receipts</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Use Rich Text Box Editor</td>
<td>Yes, No, Use Default</td>
</tr>
<tr>
<td>Read Confirmation</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Message expiration</td>
<td>1 Month</td>
</tr>
<tr>
<td>Email format</td>
<td>HTML, Text, Use Default</td>
</tr>
<tr>
<td>Signature</td>
<td></td>
</tr>
</tbody>
</table>

**SecureMail Push Type**:  
- Use Default  
- Web  
- PDF  

**Date Time Format**:  
- M/d/yyyy 12:00:00 AM/PM  
- The date and time format to use in the web and notification messages.

**Time Zone**:  
- (GMT-05:00) Eastern Time (US & Canada)  
- The Time Zone to display times in the web and notification messages.

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**Understanding Your Account Preference Options**

In most instances, you may not even need to change them, as the default values generally reflect the needs and desires of most DataMotion SecureMail customers.

However, if you decide to change any of your preferences – or to experiment to see if you would prefer a particular change – modifying your account preferences only takes a few moments.
The table below explains all of the preferences that are available to you on the Account Preferences page.

<table>
<thead>
<tr>
<th><strong>THIS OPTION...</strong></th>
<th><strong>...ENABLES YOU TO DO THIS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Priority</td>
<td>Set the priority of your messages to low, normal, or high. The default value is normal.</td>
</tr>
<tr>
<td>Receive e-mail receipts</td>
<td>Arrange to receive an automated notice alerting you whenever a recipient opens one of your messages. By default you will receive these alerts.</td>
</tr>
<tr>
<td>Use Rich Text Box Editor</td>
<td>Turn on or off the ability to format your message fonts, add color to fonts and backgrounds, and create lists. By default, the Use Default option is selected; that option enables rich text editing.</td>
</tr>
<tr>
<td>Read Confirmation</td>
<td>Force your recipients to log onto the DataMotion SecureMail 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. The default value is No.</td>
</tr>
<tr>
<td>Message expiration</td>
<td>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. The default value is one month.</td>
</tr>
<tr>
<td>Email format</td>
<td>Receive e-mail messages in HTML format. If you select Text, you will not be able to see any graphics or other special HTML formatting in the messages you receive. By default, the Use Default option is selected; that option enables HTML in the messages you receive.</td>
</tr>
<tr>
<td>Signature</td>
<td>Append a signature to the end of your emails. Simply enter your desired signature in the text entry box.</td>
</tr>
<tr>
<td>SecureMail PushType</td>
<td>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. By default, the Use Default option is selected; that option enables recipients to view your messages via the SecureMail Web portal.</td>
</tr>
<tr>
<td>Date Time Format</td>
<td>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 MM/DD/YYYY AM/PM.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Set the time zone that will display in your personal and automated notification messages. The default value is U.S. Eastern Time Zone.</td>
</tr>
</tbody>
</table>

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

**Note** If you opt to receive your messages as password-protected PDF files, you will receive the following automated notification whenever someone sends you an email message:
Getting an RSS Feed of Your Inbox or Track Sent Messages

SecureMail also enables you to take advantage of the growing popularity and convenience of RSS technology. It provides you with the ability to view your Inbox and/or your Track Sent Messages via an RSS feed.

To get an RSS feed of the Inbox

1. Log on to your DataMotion SecureMail Inbox.
2. Click the orange RSS button. The RSS Feed page displays.
3. Click **Subscribe to this feed**.

4. When prompted, click **Subscribe** again.
Once you’ve enabled RSS for your inbox and/or for Track Sent, you should see the RSS buttons on your toolbar:
From this point forward, to access a message from the Inbox, simply click on the RSS feed, then click the message subject.

You will be asked to re-enter your logon credentials if:
- You’ve logged out
- Your SecureMail session has timed out
- You’ve closed your browser and cleared your browser cache

To get an RSS feed of the Track Sent folder
1. Log on to your DataMotion SecureMail Inbox.
2. Click **Track Sent**.
3. Click the orange RSS button.
4. Follow the same steps listed above.
Appendix: Contacting DataMotion

If you have any questions, comments, corrections, additions, or errors to report concerning either the SecureMail application itself, or this user manual, please contact your DataMotion Implementation Manager.

You may also contact DataMotion directly, in either of three ways:

By phone, at 1 800-672-7233 or +1 973-455-1245, or
By email, at support@datamotion.com
Online, by completing our Customer Satisfaction and Support Online Form at http://www.datamotion.com/resource_support.php