

AirZip® FileSECURE™ 3 Author

Getting Started Guide

1 Welcome to AirZip FileSECURE

FileSECURE is an essential application for securing as well as sharing confidential and sensitive information without giving up control.

The FileSECURE Author is an application used to protect and share sensitive information. The Author enables you to easily encrypt (secure) any file on your computer. It also allows the setting of access permissions that determine who and how others can use protected information. Author also provides the ability to change permissions and track how protected files are used.

When you install FileSECURE Author, you also install FileSECURE Reader. The FileSECURE Reader is an application used to access protected information. The FileSECURE Reader ensures the information is used only as you intended and only by authorized users.

FileSECURE Author works in conjunction with a FileSECURE Server. The FileSECURE Server is the repository for file encryption keys, permission assignments, and user account information. This data determines who has access to which files and what access they have.

What is new in Release 3

FileSECURE Author 3 introduces Windows Explorer and Microsoft Office Shortcuts for securing files, an AirZip AZF File Format that secures a print quality version of any document along with the original document, and an optional advanced reporting package that provides fully customizable event reports. It is easier to use and more powerful.

What this guide provides

Section 2 WHAT FILESECURE ALLOWS YOU TO DO

Section 3 GETTING STARTED WITH FILESECURE

Section 4 PROTECTING FILES

Section 5 USING DISKSECURE FILES

Section 6 EMAILING SECURED AND UNSECURED FILES

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Section 8 CONTROLLING PERMISSIONS ON FILES YOU HAVE DISTRIBUTED

Section 9 USING SECURED FILES

Section 10 SECURED FILES MAY OPEN IN NATIVE APPLICATIONS

Section 11 WORKING OFFLINE



System Requirements

System Component	Minimum System Requirements
FileSECURE Author plus Reader	Microsoft Windows XP, 2000, ME, and 98. Installation requires approximately 35 MB of disk space for Author plus Reader.

2 What FileSECURE allows you to do

FileSECURE enables you to protect secure information with very strong encryption. FileSECURE Author features an intuitive point-and-click, drag-and-drop interface for securing, un-securing, viewing, editing, and deleting secured files with a standard Windows interface. It also makes it extremely easy to email secured files to other FileSECURE users and to track how secured information is accessed and used.

FileSECURE Author now also allows you to secure, secure and send, unsecure, and shred files directly using the Windows Explorer right-click menu and to use handy Shortcuts to secure files directly from within Microsoft Word, Excel, and PowerPoint. You can also use FileSECURE PrintSecure to secure a print-quality version of any printable file on Windows NT, 2000, and XP machines. In many cases there will not be a need to open FileSECURE Author to secure and use secured files.

In order to use FileSECURE, your system administrator or security officer will provide you a User ID and Password.

Encrypt and persistently protect any file

FileSECURE enables you to secure any file stored on your computer, files that you share with others by placing them on web servers, or files that you exchange internally or externally. When you use FileSECURE to secure files, only authorized individuals may access them and only with the permissions you assign. When you secure a file, you determine the file's access permissions:

<i>View</i>	Allows others to view the contents of a file.
<i>Print</i>	Allows others to print paper copies of a file.
<i>Copy</i>	Allows others to select and copy portions of the file (or the entire file) to the clipboard or to save unencrypted (vulnerable) copies of files.
<i>Control</i>	Allows others to change permission assignment or to revoke all permissions.

You also may set an *Available On* date and time when you want others to be able to access a file only after a certain point in time, or an *Expire On* date and time, when you want others to be able to use a file before a certain point in time.

Automatically protect files with DiskSecure

DiskSecure allows you to automatically secure files in specific directories on your local disk drive. Each time a file is added to a directory configured for DiskSecure, FileSECURE secures the file with a specified set of permissions and shreds the original vulnerable file.

Secure and UnSecure whole folders of files all at one

FileSECURE Author 3 now enables you to simply and quickly secure, unsecure or shred (securely delete) all files in a folder and all of its subfolders by simply right-clicking on the folder icon in the left pane of the Author Display and using the context menu command.

Email secured files

You may use FileSECURE to email secured files to other authorized users via a convenient email feature. EmailSecure also allows you to secure the body of email messages in addition to attachments.

Access secured files

You and those to whom you send secured files use FileSECURE Reader to access them. When you send secured files to others, you decide the access permission those users will have. When other people send you files securely, they decide which type of permissions to give you. You may only be able to view a secured file on your monitor. In this case you will be unable to copy and paste content from the file, or print or save the contents to your hard disk. When viewing files, screen print and screen capture programs are disabled. You will only be able to copy and paste content from the file, print the file, or save the original file to your hard disk if you have been specifically assigned those permissions. If you are granted the save as permission, you will be able to save the file in its original form and use it as if you received the original.

Edit secured files

If you are the author for a file (the person who secured the file) or have Copy permissions for a file, you may open a secured file directly using a native application and save the file in its original format.

Changing permissions

If you are the author or have **Control** permissions for a file, you may use **FileSECURE** to change permissions or expire files at any time.

Tracking secured file usage

If you are the author or have **Control** permissions for a file, you may use **FileSECURE** to inspect what has happened to the secured file using **FileSECURE Tracking**. If the optional Reporting package is equipped on your Server, you may generate and customize reports providing even greater detail to help you met business and legal requirements.

Logging into multiple FileSECURE Server Accounts

FileSECURE enables you to have accounts on many **FileSECURE** Servers for the purpose of securing files or accessing files that others secure and make available to you.

3 Getting Started with FileSECURE

Download the FileSECURE Software

To download and install the **FileSECURE** Author and Reader, go to

<http://www.airzip.com/FileSECUREAuthor3.htm>

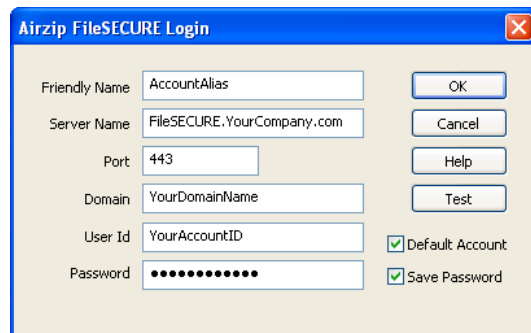
Starting FileSECURE Author

After installation, **AirZip FileSECURE Author** may be opened from the start menu by selecting **Start > Programs > AirZip FileSECURE > Author**.

Authenticating with the FileSECURE Service

To use **AirZip FileSECURE** to protect files, open protected files, or change configuration information, you first authenticate with a **FileSECURE Server** using the *Server Name*, *Port Number*, *Domain Name*, *User ID*, and *Password* that have been provided to you. The Server verifies through your account information that you are who you say you are and determines what you are allowed to do.

FileSECURE makes it easy for you to have different Accounts. For example, you may be securing information using an Account associated with your organization's own Server while viewing information using Accounts associated with several other **FileSECURE** Servers.

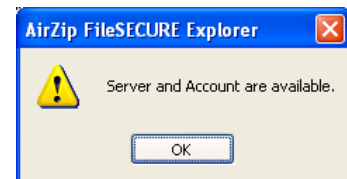


Note: Your Account information (*Server Name*, *Port Number*, *Domain Name*, *your User ID*, and *your Password*) must EXACTLY match the Server's info. Please refer to your account activation info should you have problems connecting to a Server.

Normally, the Server, Port, and Domain are automatically configured when you receive the first protected file secured by a particular Server. Once you have authenticated, **FileSECURE** remembers your account information and may automatically log you into the

Server if you have asked **FileSECURE** to remember your password.

After entering the account information, use the **Test** function to confirm its accuracy. If your account information is entered properly, the Test will show that the Server and Account are available as shown to the right.



! If your LAN uses a **proxy server** to connect to secure Internet sites (ones where the URL begins with **HTTPS**), don't forget to configure **FileSECURE** to use the proxy server.

The first time that you logon you may be asked to change your password before continuing to use **FileSECURE**. For better security, you should change your password to one that only you know as soon as possible. It is wise to select a password that contains both letters and numbers and is at least 8 characters in length.


Generally you will be required to logon only once each time you use **FileSECURE**. You may save your password so that **FileSECURE** automatically logs onto the appropriate **FileSECURE Server Account** each time you use **FileSECURE**.

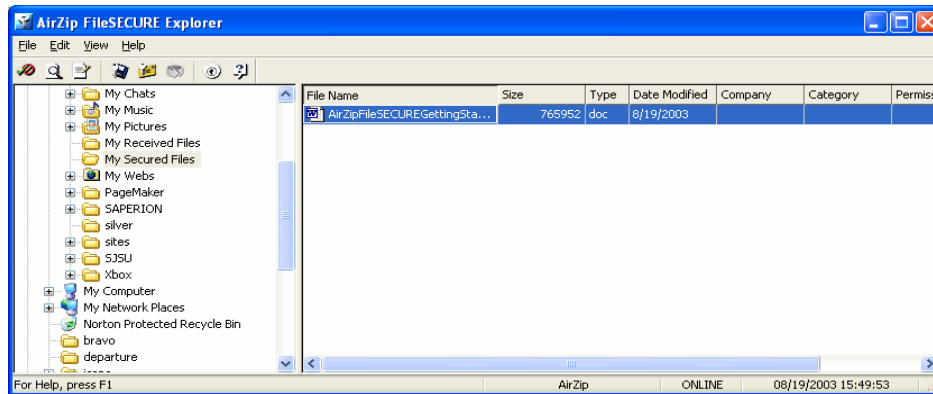


Use [FileSECURE Online Help](#) to learn more about Logging on for the first time, the Test Connection feature, changing Account Profile information such as your Email Address and Password, and about logging onto different servers.

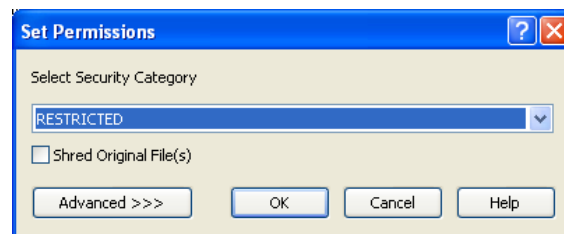
4 Protecting files

To protect a file or a group of files, you have several options:

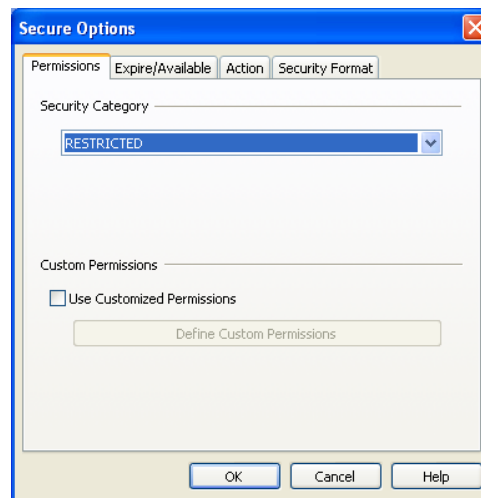
1. You may open **FileSECURE Author**, **select** the drive and folder that you want to work with, select the files that you want to protect, and click the **Secure**  button



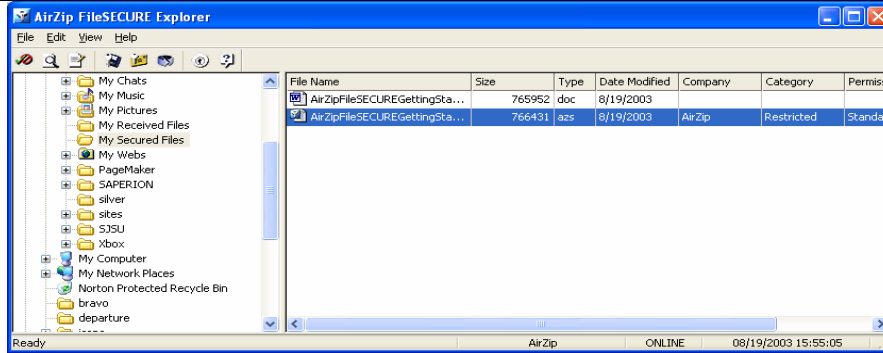
You then select a Security Category using the drop down list of Security Categories provided by your system administrator.



Alternatively you can click **Advanced >>** button to set **Custom Permissions** for specific users, **Available On** date and time, or **Expire On** date and time, if appropriate, set Actions such as moving secured files, and change the security format (.AZS vs. AZF) options.



All selected files will be secured with the specified permissions. Secured files will appear as FileSECURE (.AZS or AZF) files in the same folder as the original file.

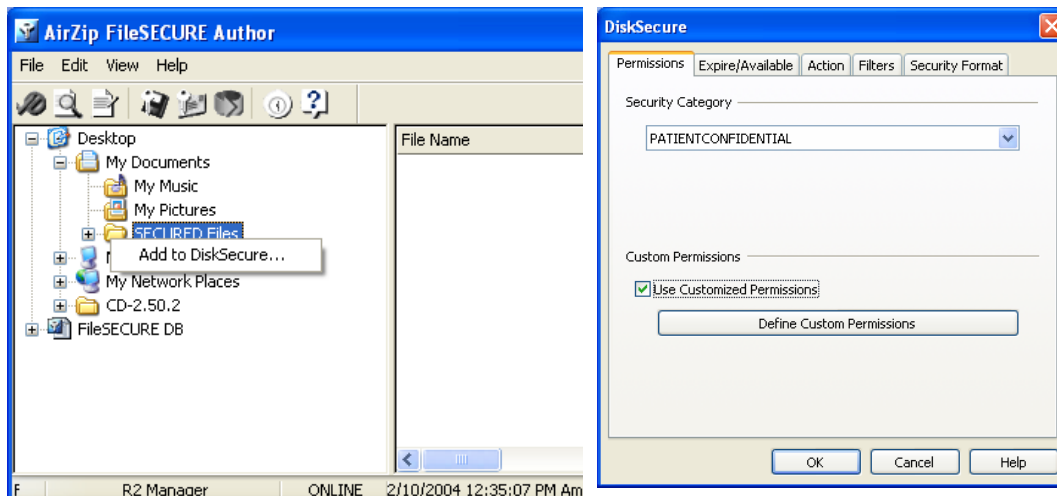


Use **Online Help** to learn more about setting permissions, the Available On and Expire On date and time, and the document shred function.

5 Using DiskSecure

DiskSecure enables you to configure specific folders (directories) on your local disk drive for storing sensitive data. Each time you move a file to a folder (directory) configured with DiskSecure, FileSECURE secures the file with specified permissions and shreds the original vulnerable file. DiskSecure may be used with only one FileSECURE account on a particular computer.

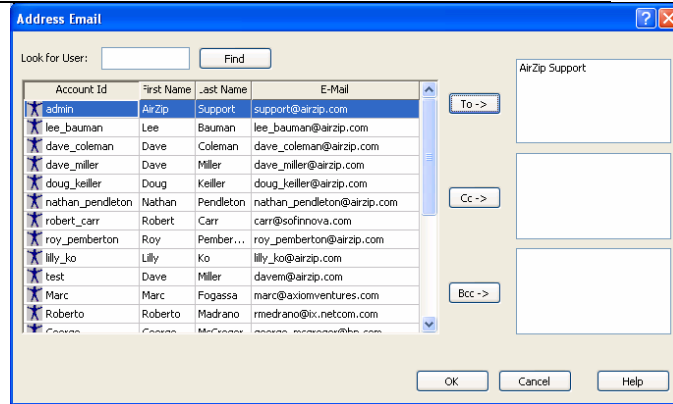
After enabling DiskSecure, you configure DiskSecure by right-clicking on the folder you want to secure in Author and specifying a set of permissions to be applied as shown below.



6 Emailing secured and unsecured files

FileSECURE lets you email protected and unprotect documents using your default Emailer right from the FileSECURE Author. Email is sent via your Outlook, Outlook Express, Lotus Notes, or other similar MAPI-compliant email packages.

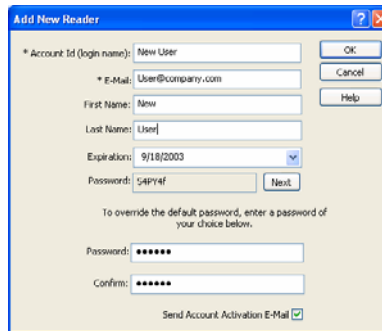
To send a secured file or to secure and send a file to other FileSECURE users, you select the file or files to be sent from within the AirZip FileSECURE Author, click the **Send** button, and address the message using Select User dialog box that appears.



Add new Reader to User list

If authorized by your administrator, you may add new Readers to the FileSECURE User list at any time. A **Reader** is a FileSECURE User to whom you may send or otherwise make available secured information. All you need is an email address!

To add a new Reader, use the menu bar **File > Users** function, click the **New Reader** button and enter the appropriate information in the New Reader dialog box.

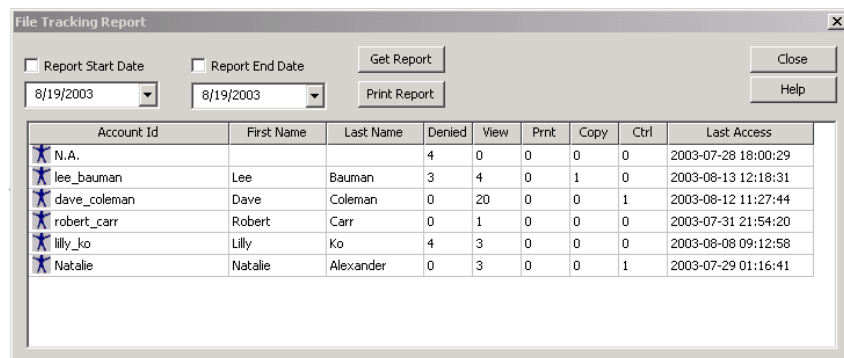


FileSECURE will create an email to the new Reader from your email account providing them procedures for downloading necessary software and activating their account.

7 Tracking files


FileSECURE tracks who uses each protected file and what action they take with the file. If you are the file owner (typically the person who originally protected the file) you can obtain a Tracking Report on one or more files in one of two ways:

To obtain a tracking report for one or more protected (.AZS or .AZF) files, select the file or files within the FileSECURE Author or in the FileSECURE DB and click the **Track** button.




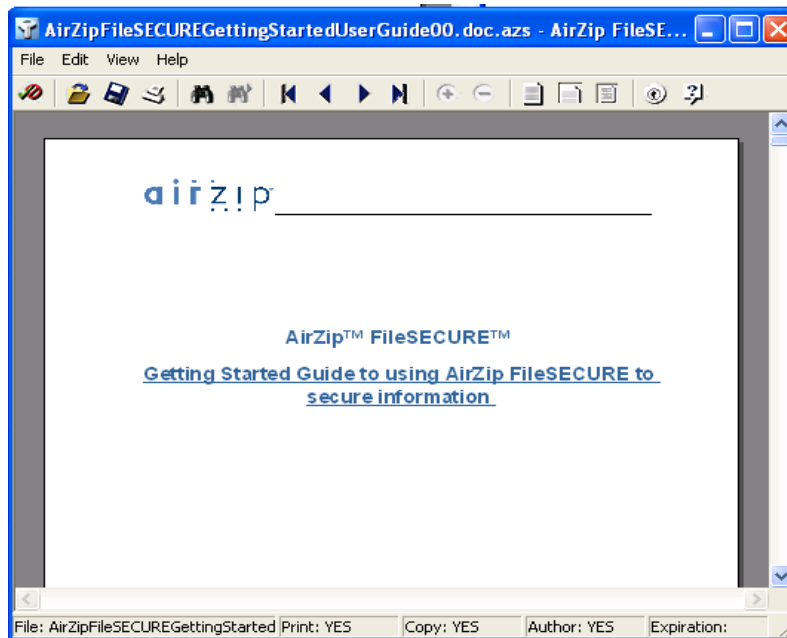
Advanced Reporting, where configured on your FileSECURE Server, makes event information available in far more detail through fully customizable reports. Use **Online Help** to learn more about obtaining the Tracking Report for a particular interval, sorting the Report, and changing document permissions.

8 Controlling Permissions on files you have distributed

To change the permissions assigned to a file or group of files, select the file or files requiring permission changes, click the **Secure**  button, and modify the **Security Category**, or select and modify the **Custom Permissions** as described above.


9 Using secured files

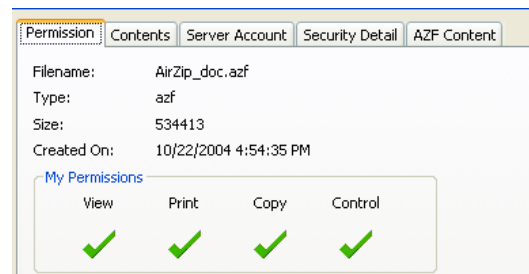
With **FileSECURE**, secured files are opened using the **FileSECURE Reader**. You can open **FileSECURE** (.AZS or AZF) files in **Reader** using the **Author View**  function or by opening the file in the usual ways.



 Note that the FileSECURE Reader disables the use of certain Windows functions such as print screen functions and the use of print screen utilities.

When accessing FileSECURE files on websites, the FileSECURE Reader will open directly within Microsoft Windows Internet Explorer. FileSECURE Reader menu features integrate within those of Internet Explorer. Taskbar functions and context menus work the same.

To determine what permissions you have for a file, use the “**File > Properties**” menu item on the Reader or Author or click the **Properties**  button on the taskbar. The Permissions Property window such as that at the right will display your permissions along with information about the file contents and the FileSECURE Server protecting it.



The FileSECURE Reader allows you to view the contents of many types of files with good fidelity, even though you may not have the application that was used to create the file. FileSECURE Reader may be used to view:

- Microsoft Word for Windows Versions through 2003
- Microsoft PowerPoint for Windows Versions 3.0 through 2003
- Microsoft Excel Windows Versions 2.2 through 2003
- Adobe Portable Document Format Versions through 1.5
- Text files including html pages and several Unicode, Macintosh, Japanese (ShiftJIS, EUC, JIS, Chinese (Big5,GB) Korean (Hangul), and Cyrillic (ANSI 1251, KO18-R)
- Image files including .jpg, .jpe, .jpeg, .gif, .png, .tif, .tiff, and .bmp files

Any file that may be printed may be secured as an AirZip AZF file. When used in application mode, menu and toolbar options provide convenient access to the most frequently used functions. Additionally, a Context Menu, such as that shown below, opened by clicking the right mouse button anywhere in the view window, makes available alternative viewing modes and controls.

Use **Online Help** to learn about file viewing modes and controls available on the Context Menu. These modes and controls vary by file type. The Context Menu is opened by clicking the right mouse button anywhere in the **FileSECURE Reader** view window.

10 Secured files may open in native applications

Where you have **Copy** permission AND the native application that created a file, **FileSECURE Reader** will decrypt secured files and open the file in your native application. If you modify the file, be sure to save it to a known directory and re-secure it. (Temporary files created when files open within native applications are automatically securely destroyed.) This feature can be enabled or disabled from the **FileSECURE Reader** Edit menu.

11 Working offline

FileSECURE will allow you to view secured files on your hard drive with **FileSECURE Reader** while offline, provided:

- Your FileSECURE Service is arranged to allow off line use.
- You have saved the associated User ID and Password.
- You have been off line no longer than the offline viewing interval configured by the **FileSECURE** Service Administrator (normally a few days).

12 Getting Support

Contact your Authorized AirZip Reseller or Service Provider to report problems and/or provide feedback.

Additional help resources or updates may be available by emailing support@airzip.com or visiting <http://www.airzip.com/support.htm>.

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