AirZip® FileSECURE™ 4
Author User Guide

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1 Welcome to AirZip® FileSECURE™ Author

FileSECURE is an 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 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. The Author also provides the ability to change permissions and track how protected files are used.

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

The 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.

1.1   System Requirements

FileSECURE Author and Reader require Microsoft Windows XP, 2000, ME, and 98. Installation requires approximately 35 MB of disk space

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 easy to email secured files to other FileSECURE users and to track how secured information is accessed and used.

FileSECURE Author allows you to secure, secure and send, unsecure, and shred files directly using the Windows Explorer right-click menu and to use shortcuts to secure files directly from within Microsoft Word, Excel, Visio, 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.

2.1   Encrypt and 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:

View	Allows others to view the contents of a file.
Print	Allows others to print paper copies of a file.
Copy	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.
Control	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.

2.2   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.

2.3   Secure and UnSecure whole folders of files all at one

FileSECURE Author 4 enables you to simply and quickly secure, unsecure or shred (securely delete) all files in a folder and all of its subfolders by right-clicking on the folder icon in the left pane of the Author Display and using the context menu command.

2.4   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.

2.5   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 permissions 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.

2.6   Edit secured files

If you are the author of 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.

2.7   Changing permissions

If you are the author or have Control permissions for a file, you may use FileSECURE to change permissions or the expiry time of the files.

2.8   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 enabled on your Server, you may generate and customize reports providing even greater detail to help you meet business and legal requirements.

2.9   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.

Getting Started with FileSECURE

2.10   Download the FileSECURE Software

To download and install the FileSECURE Author and Reader, go to
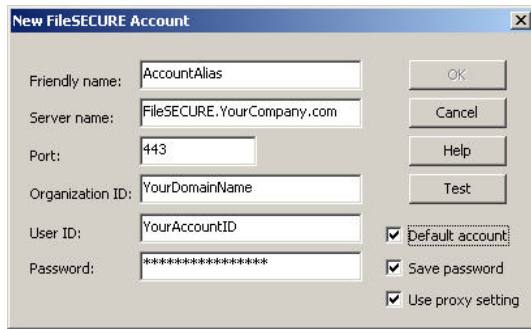
http://www.airzip.com/FileSECUREAuthor4.htm

2.11   Starting FileSECURE Author

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

2.12   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*, *Organization ID, 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 information. Please refer to your account activation information should you have problems connecting to a Server. If your LAN uses a **proxy server** to connect to secure Internet sites (ones where the URL begins with HTTPS),the proxy server will also need to be configured.

Once you have entered all the required information, press the **Test** button to verify that the information is correct. If this is successful, the **OK** button will be enabled and you can create your account. You will only be allowed to save your password if the organization's security level is set to **Medium** or **Low** however, you may still choose not to save it. FileSECURE remembers your account information and may automatically log you into the Server if you have saved your password.


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.

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.
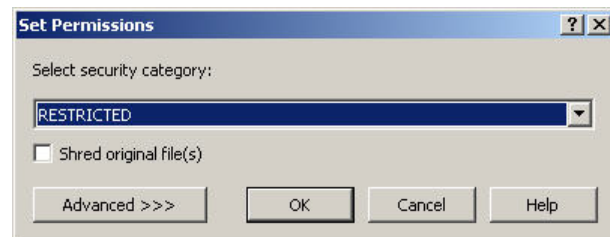
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3 Protecting files

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
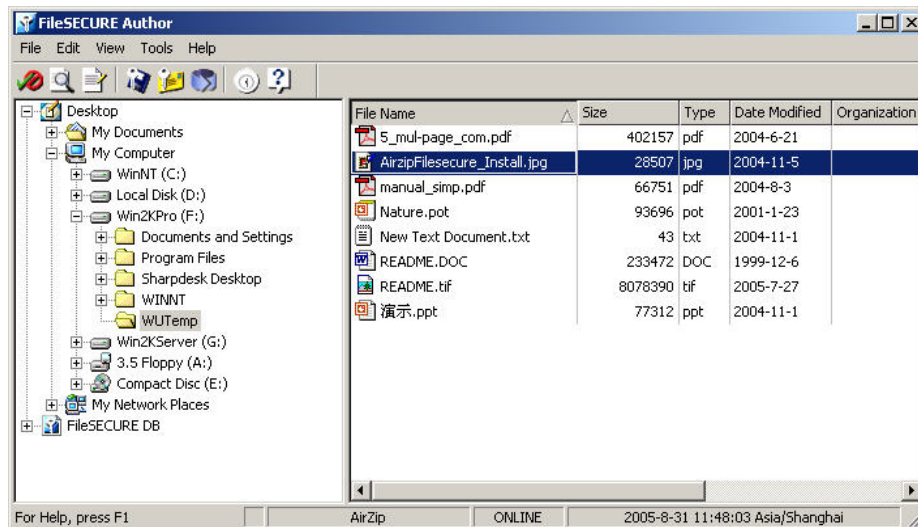

You then select a Security Category using the drop down list of Security Categories provided by your system administrator.

Alternatively you can click the **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.
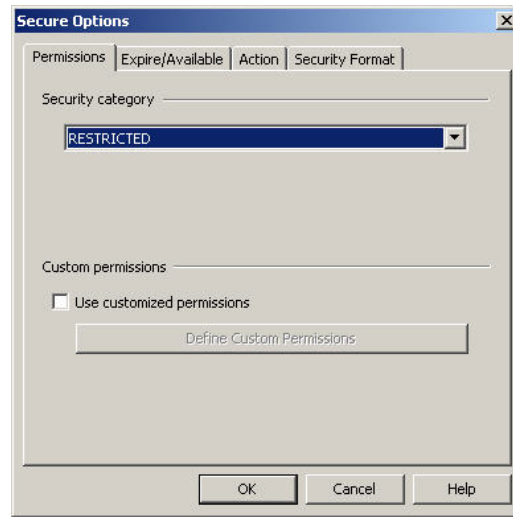
All selected files will be secured with the specified permissions. Secured files will appear as FileSECURE (.AZS or AZF) files in the same folder as the original file.
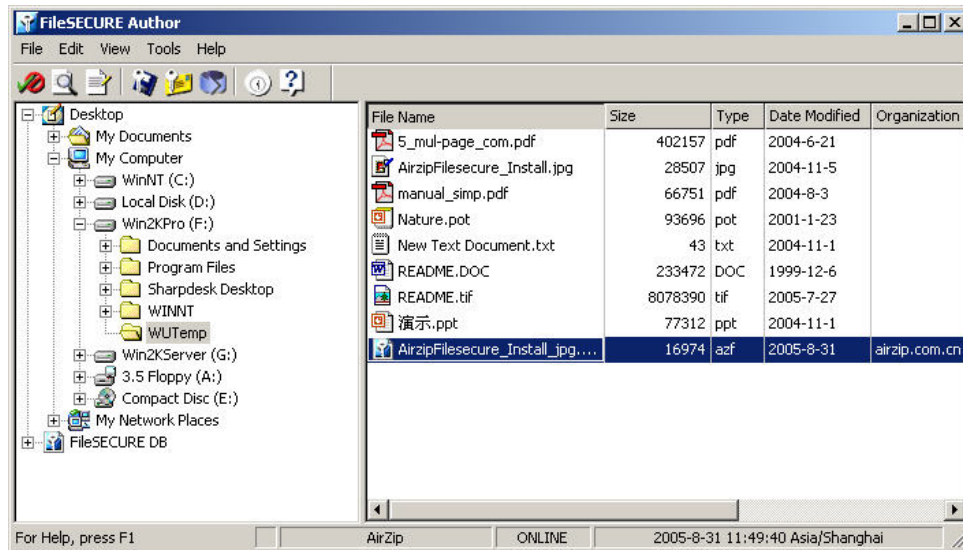
4 Using DiskSecure

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.
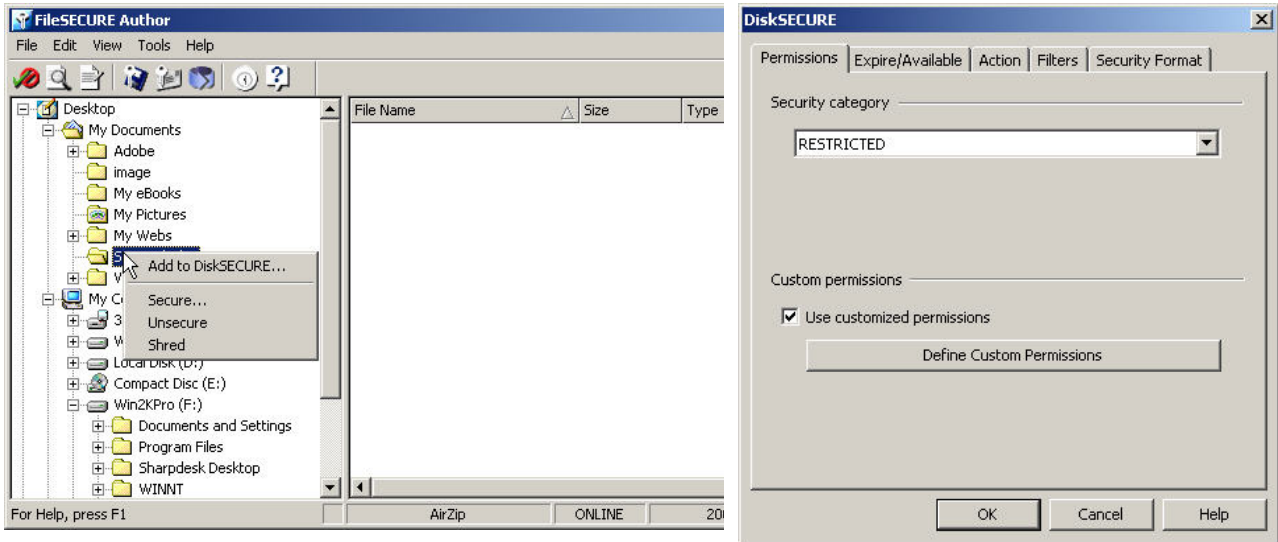
5   Emailing secured and unsecured files

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.
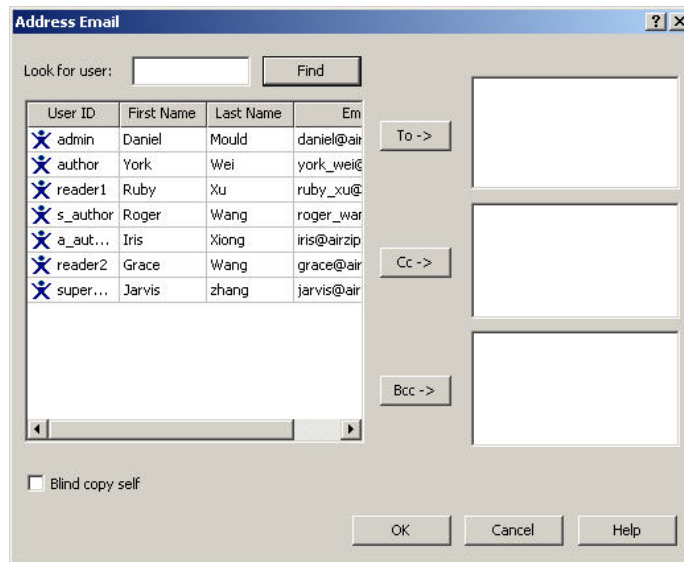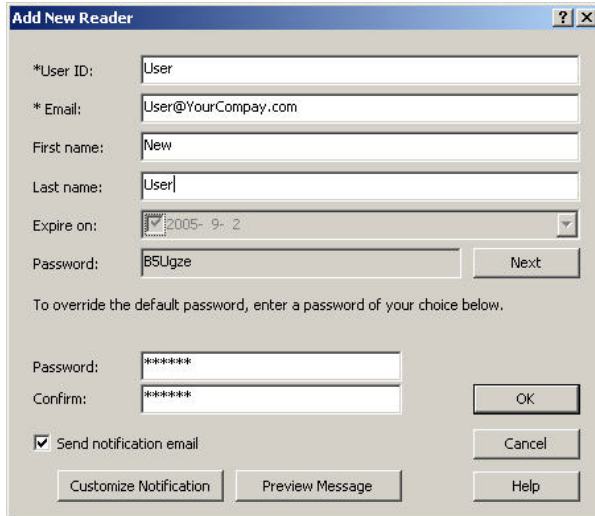

5.1   Add a new Reader to the User list

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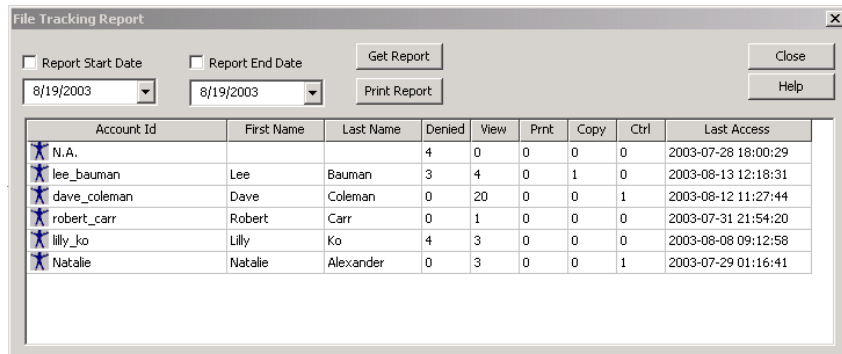
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FileSECURE will create an email for the new Reader to be sent from your email account providing them with procedures for downloading the necessary software and activating their account.

6 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 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

7 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**.**

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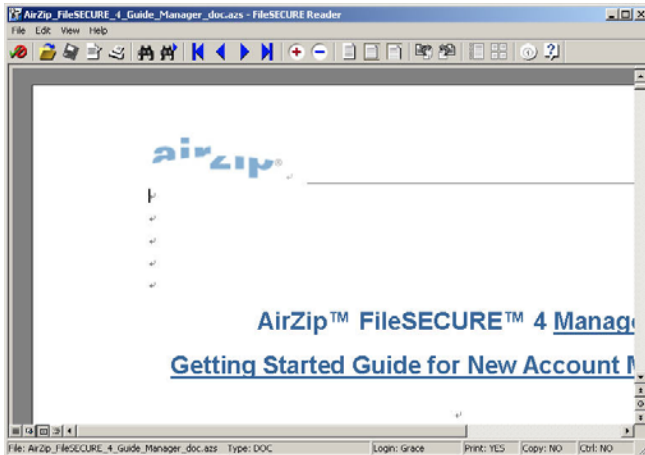
When accessing FileSECURE files on websites, the FileSECURE Reader will open directly within Microsoft Windows Internet Explorer. FileSECURE Reader menu features integrate within those of Internet Explorer. Taskbar functions and context menus work the same.

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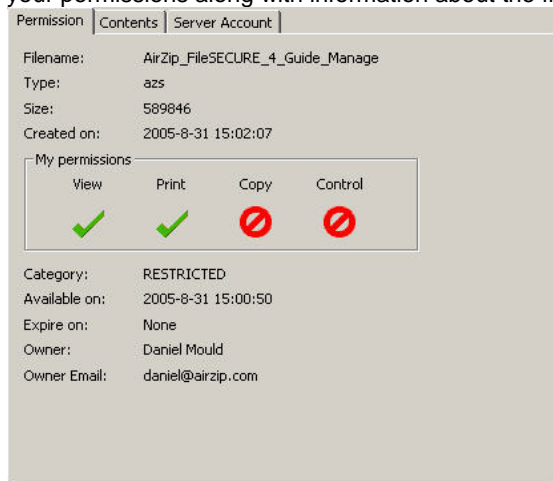
The FileSECURE Reader allows you to view the contents of many types of files with good fidelity, even though you may not have the application that was used to create the file. FileSECURE Reader may be used to view:

- Microsoft Word for Windows Versions through 2003

- Microsoft PowerPoint for Windows Versions 3.0 through 2003

- Microsoft Visio for Windows Versions 2002 and 2003

- Microsoft Outlook for Windows Versions 2000 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 (ANSID 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.

9 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.

10 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).

11 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**.

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