



# **Word Secure Messaging Administrator Guide**

## **Version 3.0**

## 1. Introduction

Congratulations on your purchase of Word Secure Messaging. Word Secure Messaging is a program that allows you to exchange encrypted messages and attachments with designated individuals in a securely-contained web environment. Word Secure Messaging has been designed to provide a high level of security protection of your data and communications well above and beyond that of normal email. Word Secure Messaging is a simpler alternative to other email encryption strategies and helps customers and their clients comply with U.S. federal privacy laws such as Red Flags Rules, SOX, GLBA, HITECH Act, and HIPAA. Word Secure Messaging also provides a centralized location where confidential communications may be stored, tracked, and archived as required under certain organizational workflows and compliance standards.

For non-critical, everyday communications, use regular email. When the security and confidentiality of the messages you are sending is important, use your Word Secure Messaging system for optimal privacy and security.

This guide provides documentation about basic features available to Users and Administrators of standard turn-key Word Secure Messaging systems. Enterprise systems can be designed to provide a higher level of customization, support custom workflows, messages, and branding, and greatly extend potential functionality of the core Word Secure Messaging system.

## 2. User Roles (Overview)

Word Secure Messaging has three user roles: **Normal Users**, **Internal Users**, and **Super Users**. Additionally, Internal Users and Super Users may be designated as **Hidden**. Normal Users may only “see” and communicate with Internal Users and Super Users within the system. Hidden Internal Users and Hidden Super Users are not visible to Normal Users. **Both Internal Users and Super Users are able to see all users** of the system, including Hidden Internal Users and Hidden Super Users.

Super Users have the highest level of authority in Word Secure Messaging and are able to manage and change user accounts, act in the capacity of all users, add and remove users, activate and deactivate accounts, and promote or demote user privilege levels and roles, and manage your subscription billing information or terminate your subscription. Therefore, only your most trusted personnel should be given the role of Super User as it gives them full management access to all functions, messages and user accounts on the system. By default, the person subscribing to Word Secure Messaging is the only Super User on the system, but others may be added as well.

More information about Word Secure Messaging user roles can be found in the **User Administration and Account Signup** section below.

### 3. Main Navigation Menu

The main Word Secure Messaging navigation menu contains five buttons, with additional 'Administration' and 'Manage Subscription' buttons if one is logged in as a Super User as illustrated below. The top menu buttons all users see are "New Message," "Inbox," "Sent Mail," "Account Settings," "Help", and "Logout". Details about these menu items are provided in subsequent sections below.



### 4. Mailboxes (Inbox and Sent Mail)

All users have access to two screens for viewing messages they've received and sent. New messages received by the user are accessed by clicking **Inbox**, available on the main navigation menu. Messages already sent may be viewed by clicking **Sent Mail**, also available on the main navigation menu. Viewing, replying to, or forwarding a message may be done from the Inbox by clicking the subject of the message, which appears as an underlined hyperlink. Clicking the link will display the complete message. You will then see the options to reply to sender, reply to all, or forward the message.

### 5. Account Settings

As a Super User, **Account Settings** is where you may change different aspects of your account. When you navigate to the Account Settings screen, you will see four sections if you are logged in as a Super User. The available sections are "Change Password," "Change Email Address," "Update User Information," and "Custom Notifications."

Please refer to the following screen shot illustrating the first three sections of the Account Settings screen. Note that as the Super User may change all aspects of your own, as well as those of your users' accounts. Users themselves may only change their Password, and their Custom Notification. Only a Super User may change a User's Email Address, where notifications of a secure message are sent.

## Account Settings

Change password

Current Password:	<input type="text"/>
New Password:	<input type="text"/>
Confirm New Password:	<input type="text"/>

Change Password

Change email address

New Email:	<input type="text"/>
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Change Email Address

Update user information

First Name:	<input type="text" value="Steve"/>
Last Name:	<input type="text" value="Hodgkins"/>
Title and Organization:	<input type="text" value="My Company, Inc."/>
Address 1:	<input type="text" value="1234 Anyplace"/>
Address 2:	<input type="text" value="Suite 1"/>
City:	<input type="text" value="New York"/>
State:	<input type="text" value="New York (NY)"/>
Zip Code:	<input type="text" value="01234"/>
Phone:	<input type="text" value="333-234-1234"/> Ext.: <input type="text" value="1234"/>

Update User Information

## Change Password

To change your password, enter the password you used to login. Enter the new password, confirm it and click **Change Password**. The change will take effect immediately for any future logins to your Word Secure Messaging system. Passwords

must be between 6-12 characters long, and may only contain letters, numbers, and the characters "!@#%&\*\_ -+".

### Change Email Address (Super User Access Only)

Since the email address in this field functions both as the user's login name and the email address used when sending message notifications, it is one of the most important user settings. For this reason, only Super Users may modify a user's email address once the account has been created. If you make a mistake while changing your Super User account's email address, and don't know what you changed it to (and no other Super User has been assigned yet), contact Word Secure Messaging Customer Support at 1-877-878-6798 for assistance.

### Updating User Information (Super User Access Only)

In the interest of security, only Super Users may modify a user's contact information and email address once an account has been established. Managing User Accounts as explained in the **User Administration and Account Signup** section below.

### Custom Message Notification

In the final section of Account Settings, users can change the default text for message notifications that will be sent to them via email, as well as the subject and email address from which Word Secure Messaging notifications (sent via email) appear to originate. This is an added security feature which can make it less obvious to others (who may have unauthorized access to a user's email account) that they are receiving encrypted messages from a Word Secure Messaging system. To make changes to the default message notification and create a custom notification, enter the new information and click **Update Custom Notifications**.

Users should be sure to whitelist the domain **wordsecure.com**, and any email address they use for the "Notification From" field – especially if that email address or domain is fictitious. Entering a fictitious email address may cause it to get filtered by spam-prevention software, so whitelisting wordsecure.com and any email address used in the custom notification field is highly recommended. Whitelisting is typically done in the email client application or with the Internet Service Provider. Since there are so many different methods of both spam prevention and whitelisting, the topic is beyond the scope of this guide. Users should contact their Internet Service Provider for more information on how to whitelist email domains and addresses.

By clicking **Reset to Default Values**, you can at any time reset your Custom Notifications to the default message notification set by the system.

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## Custom notifications

Custom notifications help to better ensure privacy by allowing you to customize how notifications about your secure messages read when they arrive via your standard email program. You can change who the sender appears to be, subject line, and even disguise the fact that messages are coming from WordSecure at all.

**Note:** setting any of the following fields to 'blank' will reset the field to the default notification value. Be sure to whitelist any email address you put in the Notification 'From' field. A fake address may be spam-filtered.

Notification 'From':

Notification Subject:

Notification Message:

```
Hello,  
  
You've received a secure message from Your Company, Inc. using Word  
Secure Messaging: The easiest way to send information securely!  
  
To view your secure message, please log into your account at  
https://wordsecure.com/?task=login&did=wordsecure  
  
NOTE: You can customize this message in your account under Account
```

[Update Custom Notifications](#)

[Reset to Default Values](#)

## 6. Manage Subscription

Your subscription to Word Secure Messaging may be managed by any Super User in the system. From 'Manage Subscription' in the top menu you may renew or upgrade your subscription level, update your billing information, or terminate your subscription at any time.

## 7. Administration

System Administration contains both global System Settings affecting your entire Word Secure Messaging system and the User Administration table allowing you to see the status of all your users at a glance. The User Administration table also allows you to sort and manage the privilege level and activation status of multiple users.

### Product Documentation

This Administrator Guide as well as the User Guide are both made available in the first section under Administration. The 'Help' button available from the top menu bar will open the Administrator Guide when logged in as a Super User. Similarly, the 'Help' button will open the User Guide when logged in as a User or Internal User.

## System Settings

System settings are hidden by default since they are not generally accessed very frequently. Click the link: [\[+\] System Settings \(click to show\)](#) to expand the System Settings fields for editing. The link will then change to [\[-\] System Settings \(click to hide\)](#) as illustrated below.

## Administration

Product Documentation: [Administrator Guide](#) | [User Guide](#)

[\[-\] System Settings \(click to hide\)](#)

System Settings

<b>Message Lifetime:</b> (in days). Set to zero (0) to negate automatic deletion of messages.	<input type="text" value="0"/>
<b>Valid Domains:</b> (comma seperated). Leave blank or set to ALL to allow public user signups from any email domain.	<input type="text" value="ALL"/>
<b>Show Public Signup Page:</b> Allow the public to create accounts?	Yes <input checked="" type="radio"/> No <input type="radio"/>
<b>Company Name:</b> This appears in system messages.	<input type="text" value="Your Company, Inc"/>
<b>Company Contact Phone:</b> This appears in system messages.	<input type="text" value="877-878-6798"/> <b>Extension:</b> <input type="text" value="701"/>
<b>Company Contact Email:</b> This appears in system messages.	<input type="text" value="sysmon@wordsecure.com"/>

[Update System Settings](#)

## Message Lifetime (Setting Duration)

The default Message Lifetime value is 0. This setting means that no messages in your system will be deleted automatically. You may, however, opt to set an message expiration time (in days). All messages older than the defined Message Lifetime will be deleted automatically by the system. When this condition is set, you and your users will see a notice at the top of the Inbox and Sent Items screens indicating the duration of time before received or sent messages are automatically deleted.

### Valid Domains (Restricting Public Signups by Email Domain Name)

By default, Word Secure Messaging allows users to sign up for accounts using email addresses from any internet domain name. If you want to allow signups from all domains, simply leave the Valid Domains field blank or set to "ALL" (without quotes). If you wish to restrict users who can sign themselves up for an account on your Word Secure Messaging system to a particular email domain, you may add to this field a list of valid domain names separated by commas. After you have input the allowed domain list, click **Update System Settings**. Once set, only email addresses belonging to the domains listed will be granted accounts from the Public Signup page (assuming it has been activated as mentioned in the section below). Note that a Super User may create user accounts regardless of the Valid Domain setting and thus may override this feature.

### Show Public Signup Page

By default, Word Secure Messaging allows users to sign up for accounts themselves. By selecting "No" in this field, the Super User may disallow access to the Public Signup page. This also removes any default links to the signup page from the login and main pages.

### Company Information (Name, Phone, and Email Contact)

Your company information appears in various places throughout the system, letting users know who they should contact in case they have questions or trouble with their account. To make changes to your company information, enter new information into the appropriate field and then click **Update System Settings**. If the data is in the proper format, the system displays a message letting you know the company information has been successfully updated.

## 7. User Administration and Account Signup

The User Administration interface has been designed to allow for efficiency when managing users. If you have logged in as a Super User, you will be able to see and manage the complete list of all users. The list of users is only accessible by a Super User from the Administration screen, accessible by clicking **Administration** on the navigation menu. Checking boxes next to multiple users before clicking **Update Selected Users** will allow you to change parameters on multiple accounts simultaneously. If the box next to the user's name is not checked, that record will be ignored.

You may also sort your list of users by **User Name**, **User Email/Login**, **Last Active** date, **Privilege Level** or **Status** simply by clicking the underlined header of the column you wish to sort.

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## Administration

Product Documentation: [Administrator Guide](#) | [User Guide](#)

[+] [System Settings \(click to show\)](#)

### User Administration

[Add New User](#) [Update Selected Users](#) [Delete Selected Users](#) [Cancel](#)

Total number of users displayed: 6

<input type="checkbox"/>	User Name ↑	User Email/Login	Last Active	Privilege Level	Status	
<input type="checkbox"/>	Sarah George	<a href="#">sarah@wordsecure.com</a>	11/08/2012 4:42 PM	Internal User	Active	<a href="#">Manage User</a>
<input checked="" type="checkbox"/>	Doreen Hodgkin	<a href="#">doreen@wordsecure.com</a>	Pending	Normal User	New	<a href="#">Re-Invite</a>
<input type="checkbox"/>	Jon Lybrook	<a href="#">jon@wordsecure.com</a>	10/09/2012 4:41 PM	Hidden Internal User	Active	<a href="#">Manage User</a>
<input type="checkbox"/>	Marty Mapes	<a href="#">marty@wordsecure.com</a>	11/13/2012 3:16 PM	Super User	Active	<a href="#">Manage User</a>
<input type="checkbox"/>	Billy O'Hara	<a href="#">billy@wordsecure.com</a>	11/09/2012 8:40 PM	Normal User	Active	<a href="#">Manage User</a>
<input type="checkbox"/>	George Washington	<a href="#">george@wordsecure.com</a>	11/13/2012 4:58 PM	Normal User	Active	<a href="#">Manage User</a>

[Add New User](#) [Update Selected Users](#) [Delete Selected Users](#) [Cancel](#)

Total number of users displayed: 6

## Management Roles and Restrictions

When adding or changing a user account from the Administration screen, you may assign one of the following management roles:

1. User (Normal User)
2. Internal User
3. Hidden Internal User
4. Super User
5. Hidden Super User

The following rules apply when communicating via Word Secure Messaging:

1. **User** (normal user) – Can only send messages to other Users, Internal Users, or Super Users. When a User composes a message, therefore, Hidden Internal Users and Hidden Super Users will not be displayed in the list of possible recipients.
2. **Internal User** – All users may see and send messages to these users.
3. **Hidden Internal User** – Only Internal Users, Hidden Internal Users, Super Users, and Hidden Super Users can see and send messages to Hidden Internal Users.
4. **Super User** – All users may send messages to this kind of user. This user role also gets access to the Administration functions, allowing them to change system and user settings.
5. **Hidden Super User** – Only Internal Users, Hidden Internal Users, Super Users, and Hidden Super Users can see and send messages to Hidden Super Users. This user role also gets access to the Administration functions, allowing them to change system and user settings.

## Adding New Users

Users may be added to your Word Secure Messaging system in two ways. The first way is to direct users to create their own account from the Public Signup link provided on the Login page, provided this option is allowed in the System Settings. The other way is to add users manually from the Administration screen while logged in as a Super User.

## Adding New Users from the Administration Screen

To add a new user manually, click **Add New User** in the User Administration section of the Administration tab. You will see the following screen:

### Add New User

Add New User

Note: items marked with "\*" are required

\* Email Address:

\* Confirm Email:

\* First Name:

\* Last Name:

Title and Organization:

Address 1:

Address 2:

City:

State:

Zip Code:

\* Phone:  Ext.:

\* Mgt. Level:

Notify me when user activates account

When you add a user account to Word Secure Messaging for your organization, the user must activate the account within 72 hours in order to use it. After 72 hours any new

accounts not activated will be removed from the system. The User Account Activation process is described later in this document.

When user accounts are added from the Administration screen, you may set their management level prior to submitting the form. You may also check the box to request that an email notification be sent to you when the user activates their account.

Once the form has been submitted, an email verification message is sent by the system to the email address of the user who is being granted the account.

### **Disabling and Reactivating User Accounts**

When a new user is added to your Word Secure Messaging system, the status of the user is immediately shown as “New” until they complete the registration process by logging into the system for the first time, accept the End User License Agreement, and change their password. Until activated, the account is not usable nor can secure messages be sent to this user. As soon as the newly added user validates their account, the Status is changed to “Active.” Once activated, you can change the Status to “Disabled” to deactivate the user account temporarily. This can be done by checking the box next to the user’s name, changing the Status field from Active to Disabled, and clicking **Update Selected Users**. When the account of the user is disabled, the user will not be able to login to the system.

### **Deleting Users**

Rather than disabling a user account, you may need to delete a user from time to time. Please be aware that once a user account has been deleted it may not be re-added using the same exact email address until all messages from that account have been deleted and otherwise purged from the system. This is to avoid confusion and/or security issues caused by having multiple accounts in the system using the exact same login name/email address.

### **Changing / Upgrading User Privilege Level**

Similarly to activating and disabling user accounts, you can change the Privilege Level of users at any time by selecting the checkbox next to any user and then selecting the appropriate management role from the dropdown menu. After selecting the desired Privilege Level for the user, click **Update Selected Users**. You may also update more than one user at a time by selecting the checkbox next to each user account to which you wish to make changes.

### **Re-Inviting a User**

If a pending user does not complete the registration process, a Super User may choose to resend the email inviting the user to activate their account before it expires (72 hours

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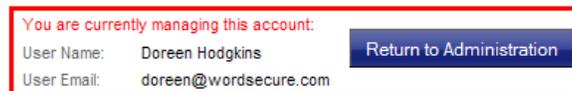
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by default). They may do this by clicking the button 'Re-Invite' next to their user account. This is only available for accounts in a "New" or pending state. If a new account expires and is removed from the system automatically, it may be re-added by a Super User via the Administration screen or via the **Public Signup Page** (assuming it has been activated as described below).

### Managing User Accounts

In some cases, it may be necessary to act on behalf of the user in order to change their password, contact information, test functionality, or modify other account settings for them. By clicking **Manage User** next to the user account, you are able to perform actions as that user and update Account Settings they cannot update themselves, such as email address and User Information.

While managing a selected user account you will see the following reminder at the top of every screen:



While in this mode, any actions performed (except for those under Administration or Manage Subscription) will be performed as the user you are managing. Clicking **Return to Administration** within the red box will change the status of the Super User managing the user account back to its original state. Likewise, if at any point while managing another user account a Super User clicks on "Administration" or "Manage Subscription" from the top menu, they leave the mode of managing a given user's account and return to their own Super User account.

### Show Public Signup Page (Allowing Users to Create Their Own Account)

The Public Signup form is a publicly accessible web page that allows users to sign themselves up to use your Word Secure Messaging system.

New users of your system must access Word Secure Messaging from the unique URI or domain as logged to your system. If you purchased a standard turn-key Word Secure Messaging product, the link to your company's Word Secure Messaging login page will look something like this:

*Example:* <https://wordsecure.com/?task=login&did=abcdef123456>

If public signup is enabled in the System Settings under Administration, the main page and the login page of your Word Secure Messaging system will both contain a link to the Public Signup page. You may want to create a link to the login or Public Signup pages directly from your main website as well for the convenience of your staff, clients, and associates.



## Secure Login

Please provide the following information to the **Word Secure Demo System**. If you are trying to login to an actual Word Secure client account, be sure you are using the URL from the Email we sent to log in.

Wordsecure Login

Your Email Address:

Your Password:

Don't have an account yet? [Click Here](#) ←

Forgot your password? [Click Here](#)

By logging into the system you are agreeing to our [End User License Agreement](#).

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## Public Signup Page

After clicking the account signup link (as shown above), potential users will be directed to the Public Signup page for your system, allowing them to create a user account for themselves. Again, this link will only appear if “Show Public Signup Page” has been enabled under Administration | System Settings.

Once on the Public Signup page for your system, the user enters their account details in the form and clicks **Signup**. If all information is valid, the system sends an email to the user to verify their email address. Note that if any user attempts to submit this form while logged into the Word Secure Messaging system, they will be logged out.

## User Account Activation

Regardless of how a user account is created, either from the Administration area by a Super User or from a Public Signup page, it is necessary for the user to follow the instructions in the initial email verification message sent by the system before they may begin sending or receiving messages. The email verification message will contain a temporary password and a link to the Word Secure Messaging system on which they have an account. Users must click the link and login with their email address and temporary password. They will then be prompted to accept the End User License

Agreement, and change their temporary password to a permanent one. At this point, the account is now active and the user is taken to their Inbox.

### **Sending and Receiving Messages**

Once a user account has been created and verified, the user may send, receive, forward, and reply to secure messages containing up to ten attachments per message. The size of each attachment is limited to 50MB. Received messages will appear in the user's Inbox. Messages sent by the user will appear in their Sent Mail box.

## **8. Composing, Replying to, and Forwarding Messages**

### **Composing Emails:**

To compose a new message from your Inbox screen, click **Compose a New Message**. You may also click **New Message** on the main navigation menu from any screen. In either case you will see the Secure Message screen where you may create and send your secure message.

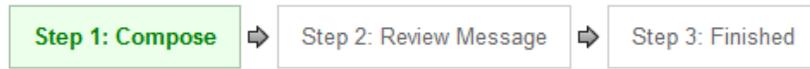
To select recipients, simply click **TO** or **CC**. When you do, a popup menu will appear with a list of possible recipients. At least one TO recipient must be selected in order to send a message. If you wish, you may select the priority ("High," "Normal," or "Low") by selecting the appropriate radio button. By default the priority is set to "Normal."

Check the box next to any user(s) to whom you wish to send a message and then click **Close** in the top right-hand corner of the TO or CC window. Enter your message subject and body, and click **Review Message**. If everything appears correct after reviewing the message, click **Send Message**. Your message and any attachments are then encrypted and stored on the secure server and any recipients are notified that they have a secure message waiting for them via an email notification.

### **Attachments**

You may also select up to ten attachments to send with your secure message. Attachments may be selected one at a time by clicking on the red "Upload Files" button and selecting your files one at a time. Multiple files may also be selected at the same time, or dragged and dropped onto the **Upload Files** button when using Firefox or Chrome browsers only. The maximum size for each file is 50 MB. Files are encrypted on upload and the message content is encrypted before it is sent to the database.

## Secure Message



Edit Message

*Click on the TO: and/or CC: buttons below to include recipients. Items marked with "\*" are required.*

\* TO:

CC:

Priority:  High  Normal  Low

\* Subject:

Message Body:

Attach up to 10 files

## Replying to or Forwarding Messages

Messages received may also be Replied to or Forwarded to another user. Forwarded messages with attachments will include the attachments by default, which may be removed entirely or replaced with other attachments.

### 9. Auto-Logout

By default, users are logged out automatically after one hour of inactivity. An alert box will appear after 15 minutes which they may not see if the user has stepped away from their computer or has Word Secure Messaging running in the background. The dialog box provides an opportunity to stay logged in, or log out immediately. These timeouts may be customized by request for clients using Word Secure Messaging Enterprise Systems.

### 10. Conclusion

Word Secure Messaging is a secure email alternative that is easy to use and administrate. We provide phone and email-based support to our clients, Monday through Friday, 9am to 5pm Mountain Time. Word Secure Messaging is available both as a low-cost turn-key solution and as a custom enterprise solution for businesses that require custom branding or other specialized needs.

For technical support, or more information about Word Secure Messaging products or services, call us Toll-Free at **1-877-878-6798** or send us an email to **service@wordsecure.com**.