



AirZip[®] FileSECURE[™] 4.0

Quick Start Guide

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1 Introduction

1.1 Who Should Use This Guide

This guide is intended for system and IT administrators who are comfortable with installing both system software and applications on Windows PCs. It is intended as a high level overview and assumes that your systems are configured correctly for software installation and internet connectivity. For more complex installations or if questions arise, please refer to the **FileSECURE Server Installation Manual**.

FileSECURE also has extensive online help available for both Server and Client use. Please refer to Section 7 for assistance in locating help for all topics.

1.2 What is Included in This Guide

- Install FileSECURE Server
- Install SuperUser Utility
- Start and Login to SuperUser Utility
- Install Licenses
- Create Organization
- Install FileSECURE Clients
- Login to FileSECURE Manager Utility
- Create Users
- Create Groups
- Create Categories
- Start and login to FileSECURE Author Utility
- Secure a document
- Configure a ScanSecure/AutoSecure directory
- View a secured document in the Reader
- Getting Help in FileSECURE

2 Server Installation

Insert the FileSECURE CD, which will bring up a menu of selections allowing you to install the Server, Super User, Manager, Author, and Reader.

If this menu does not appear, browse to the CD drive of your computer and double click on Autorun.exe.

2.1 Install FileSECURE Server

Choose **Step 2** from the FileSECURE CD menu to begin the server install. Accept the License Agreement and choose the default selections during the remainder of the install. The default directory that FileSECURE is installed in can be changed during the install. You will receive an Installation Complete message at the end.

Following the initial installation the following must be configured:

- The communications port that the FileSECURE server will use.
- The database to be used which is either the embedded database or an external database such as PostgreSQL, MS SQL Server or Oracle9i.

You will also need to:

- Install a CA-signed or AirZip-signed certificate.
- Install a license key file.

More detailed setup instructions are contained in the accompanying **FileSECURE Server Installation Manual**.

3 Super User Installation

3.1 Install the Super User Utility

Choose Step 3 from the FileSECURE CD menu to install the Super User Client. Accept the license agreement and proceed with the install. When complete, start the Super User Client from the Windows start menu. The following section provides a brief outline of how to set up the Super User program and set up an organization. For more detailed instructions refer to in the **FileSECURE Server Installation Manual**.

3.2 Login to the Super User Utility

To login to the Super User Utility, press the Login button. If this is the first time you have logged in to a FileSECURE client on this computer, you will be presented with a **New FileSECURE Account** dialog. If you see **Select FileSECURE Account** instead, click on **Accounts** and then click on **Add**. Fill out the fields as explained below:

- **Friendly Name:** This is a descriptive name for the account; it can be anything you like, such as *Super User*.
- **Server Name:** This is the server hostname, such as `filesecure.airzip.com`. This entry should be the same as what you entered for Common Name when generating the server certificate during the server configuration.
- **Port:** This is the same value that was set during your server install. The default is 443.
- **Organization ID:** To log into the Super User Utility, this field should ALWAYS be empty.
- **User ID:** The value for this field should be *super*. This field is case sensitive.
- **Password:** The default password is *super*. This field is case sensitive and you will be asked to change it when you login successfully. **Note:** For security reasons, the Super User cannot save their password to automatically login to the server. This also applies to all manager accounts.

3.3 Add an Organization

Organizations are where users, groups and categories will be created. Most FileSECURE installations will contain only one Organization per server. To create a new Organization, press the **New Organization** button. Write down the password and press **OK** to continue.

The New Organization dialog has several required fields that are denoted by the asterisk (*) symbol. The remainder are optional, but should be filled out for completeness. The required fields are:

- **Security Level:** Controls the number of unsuccessful logins that can be attempted before the account is locked out. High security allows 6, Medium allows 10, and Low does not have a limit. On High security level, all users are prohibited from saving their passwords. On the other levels, users may choose to save their passwords to facilitate automatic logins. Super Users and Managers are prohibited from saving their passwords for all security levels.
- **Name:** Descriptive name of the Organization.
- **Organization ID:** Reference name for the Organization. This is the text that will be used in the Organization ID field when users attempt to login. It can be identical to the Name field and is case sensitive.
- **Email:** Email address of the user who will be designated as the default Organization manager. Notification emails will be sent to this address.

- **User quotas:** Enter the number of each type of user your Organization will be using in the **Amount** column. If you are only configuring one Organization on the server, allocate all of your licensed users to it. **IMPORTANT:** Never allocate more users of any type than you have licenses for.

Click on **Apply** to create the Organization. This will generate a private key file that can be used to recover documents and an email notification will be sent to the Organization's manager. **Note:** the Manager's login information is contained in the email.

When complete, your new Organization will be listed in the Super User Utility main window. You can select it and choose **Edit Organization** to change the settings later.

4 FileSECURE Manager

4.1 Install FileSECURE Manager

The FileSECURE Manager can be installed from the FileSECURE CD or over the Internet. Both options are available from the FileSECURE CD menu. Choose **Install Manager** and then select the where you would like to install from to start the installation. This option will install the Manager, Author and Reader applications. All of them will be available from the Start menu under the AirZip FileSECURE group.

As with the Super User Utility, the FileSECURE clients can be installed on any computer that has access to the FileSECURE Server machine over the Internet or your intranet.

4.2 Login to the FileSECURE Manager

Start the FileSECURE Manager from the Windows start button. The login sequence is similar to the sequence used to login to the Super User Utility, except that a Organization ID is required in the case of the Manager and all other clients. You cannot login to the Manager client using your Super User account. The login information for the Manager is contained in the notification email that was sent when the Organization was created in the previous section.

All fields, with the exception of the friendly name will be displayed in notification Email.

- **Friendly Name:** This is a descriptive name for the account; it can be anything you would like, such as *Manager*.
- **Server Name:** Example: *filesecure.airzip.com*
- **Port:** Example: *443*.
- **Organizaiotn ID:** Example: *AirZip*. This field is case sensitive.
- **User ID:** This field should be *admin*. This field is case sensitive.
- **Password:** The password is generated when the Organization is created. This field is case sensitive and you will be asked to change it when you login successfully.

4.3 Adding Users

Click the **Users** button to display the User Administration dialog. Clicking the **Find Now** button will display all of the users that have been created for the Organization you are logged into. The first time you do this, only the admin user will be displayed. This is the default Manager account you are currently logged in under. To create a new user, click on the **New User** button. Accept the randomly generated password and fill in the user fields as follows:

- **User ID:** Case sensitive name that the user will enter to login.
- **E-Mail:** Email address where notification Emails for this user will be sent.
- **Type:** These include, Manager, Author, Author-Plus, S-Author, A-Author, and Reader. Please see the Manager User Guide for complete description of these types.

Click on **Apply** to create the new user and generate the notification Email.

4.4 Creating Groups

Groups are used to easily assign common groups of users permissions. Examples of groups are: Marketing, Sales, Engineering, Managers, Directors, and Executive Staff.

To create a new group:

- Click on the **Groups** button.
- Click on the **New Group** button.
- Type the group name and press <enter>.
- Click on the new group.
- Click on **Add User**.
- Click on **Find Now** to display all users in the Organization.
- Select desired user(s) and click **OK**.

4.5 Creating Categories

Documents can be secured easily by using categories. Users and Groups can be included in Categories. Each can be assigned different permissions in a specified category. Examples of categories are: Secret, Confidential, and Sales Reports.

To create a new category:

- Click on the **Categories** button.
- Click on the **New Category** button.
- Type the category name and click on **Apply**.
- Click on **Edit Permission**.
- Click on the users and groups that you would like to add to the category and then click on the rightward facing arrow.
- In the right-hand window, assign permissions to groups and users.
- Click on **Apply**.
- Click on **Close**.

5 FileSECURE Author

The FileSECURE Author is used to manually secure documents and to configure ScanSecure/AutoSecure directories so that documents are secured automatically. If you have installed the FileSECURE Manager, the Author was installed at the same time.

5.1 Login to the FileSECURE Author

Start the FileSECURE Author program by clicking on the **Start** button and looking in the AirZip FileSECURE group. You can login to the Author with either a Manager account or any type of Author account (Author, S-Author, A-Author, Author-Plus). You can not login to the Author with a Super User account or a Reader account. To create an AutoSecure directory or a ScanSecure directory you must be login as an A-Author or S-Author respectively.

5.2 Secure a Document

Locate the document you would like to secure by browsing to its directory in the left-hand window in the Author.

- In the right-hand window, right click on the desired document and select **Secure**.
- Select the Security Category to secure the document under.
- Click on **Shred original file(s)** to delete the un-secured original document.
- Please refer to the FileSECURE Author Getting Started Guide for information about Advanced options.

The secured file will have an .AZS extension. You can do anything you would like with the secured document.

5.3 Securing from Windows Explorer

With Version 4.0 of FileSECURE you can easily secure files from Windows Explorer.

- Inside Windows Explorer, right click on any file with your mouse.
- Select **FileSECURE**.
- Select **Secure...** If you would like to Secure and Email a document, select **Secure and Send**
- If you have not previously logged into file FileSECURE, you will be asked to login now.
- Select the Category to secure the document under.
- Click on **OK**.
- The document will be secured, with a .azs or azf extension added to the end of the file name.

5.4 Configure a ScanSecure/AutoSecure Directory

If you have logged into the Author using an A-Author or S-Author account, you will have the option for configuring a directory to automatically secure files that are placed in it.

- From the Edit menu, select **DiskSecure**.
- On the Folders tab, click **Add** and browse to the desired directory and click on **OK**.
- From the Permissions tab, select the category you would like the documents secured under.
- Click on **OK** to go back to the Set DiskSecure dialog.

- Click on the **Enable** tab.
- Click on the **Enable DiskSecure** button. If asked, confirm that you would like to start the service.
- If desired, check the **Run DiskSecure when Windows starts** checkbox to enable this feature every time Windows starts.
- Click on **OK** to accept the changes.

Now any file dropped into this directory will be secured automatically.

6 FileSECURE Reader

The FileSECURE Reader is used to view and manipulate documents secured by the FileSECURE Author. Authors control what rights a user will have when the document is secured. Permissions are Print, Copy and Control.

6.1 Starting FileSECURE Reader

You can start the FileSECURE Reader from the Windows Start button or by double-clicking on a secured file in an Email or in Windows Explorer. Double clicking on the document will bring up the Reader login dialog and display user logins that have permissions on the Organization the document was secured with. If you have the password saved, you will be logged in automatically and the secured documents will be displayed.

When the document is open, the permissions are displayed on the status at the bottom of the display. The File and Edit menus will reflect these permissions by graying out options you do not have permissions for.

6.2 Viewing FileSECURE Files

AirZip FileSECURE secures files in two file formats: **.AZF** and **.AZS**. The default format is **.AZS** and should be used unless you have problems with displaying these files. The **.AZF** file format includes a print-quality version of the document along with the original document within the secure file. Inclusion of the print-quality version ensures that you see the document exactly as it would appear if printed. Users may create the new file format when securing documents as long as an application is available that can be used to print the original file.

The **FileSECURE Reader** will open and display ANY file secured as an **AZF** file. If the file has been secured as an **AZS** file, the **FileSECURE Reader** will open and display over 100 different file types. Supported file types are listed in the On Line Help. While supporting a very broad range of files secured as AZS files, the **FileSECURE Reader** supports many, but not all features of each type of file. Because of this, files may not appear exactly as they would in their native applications.

Use the On-line Help to learn how to work with each type of file.

6.3 Working with UGS and AutoCAD Files

The **FileSECURE Reader** uses the utilities of the UGS Solid Edge and AutoCAD Volo Viewer to display certain secured UGS and AutoCAD files where this software is installed on the end user's computer.

The Reader may be used with either UGS Solid Edge version 11 or, preferably, version 16 for secured viewing of **Solid Edge** drawing, assembly, and part files.

The Reader may be used with Volo® View 3 for secure viewing of plot AutoCAD® 2004 and Autodesk Inventor® 8 files.

For more details contact your AirZip reseller.

7 Getting Help in FileSECURE

FileSECURE provides a wide variety of ways to get help while installing and using FileSECURE. The following is a list of help options and where they are available for your use.

7.1 Client Application Help

Each of the FileSECURE client applications provides extensive on-line help. In the Super User and Manager clients, help can be started by clicking on the **Help** button. For the Author and Reader clients, help can be started by selecting the **Help** menu and then selecting **Help Topics**. All of these help files contain a Table of Contents, an Index and can be searched for any subject you are having a problem with. Also, most dialogs that you will encounter while using the FileSECURE clients will have a help button included. Simply click on the help button and help related to the current dialog will be displayed.

7.2 Getting Started Guides

When initially becoming acquainted with the FileSECURE clients, you may find it useful to have the related Getting Started Guide available. These guides can be found on the AirZip Client Download pages on the AirZip Website. The files are listed on the right side of the download pages under the title **Getting Started Guides**. The files are available in MHT (HTML) and Microsoft Word formats. To download any of the guides, right-click on the desired guide and select **Save Target As...** You can then save the desired format to your hard disk for future use. The guides are located at:

Manager: <http://www.airzip.com/FileSECUREManager4.htm>

Author: <http://www.airzip.com/FileSECUREAuthor4.htm>

Reader: <http://www.airzip.com/FileSECUREReader4.htm>

7.3 Server Install and Maintenance Help

For help with installing and using the FileSECURE server, please refer to the FileSECURE Server Installation Manual. This manual contains detailed instructions for installing FileSECURE Server on all supported platforms. If FileSECURE Server is installed on a Windows system, the manual can be found on your Windows start menu under AirZip FileSECURE Server 4. It can also be found by inserting the FileSECURE Server CD in your computer. When the menu is displayed, select Step one, **View Installation and Configuration Manual on CD**.

Help is also available inside the FileSECURE Database Manager and FileSECURE Control Panel utilities that can be found on your FileSECURE Server machine. Like the other FileSECURE clients, you will often find help buttons displayed in these utilities that can take you directly to related help.