FMI Secure Mail
Contents

1 FMI Secure Collaboration ................................................................. 3

2 Setting up FMI Secure Collaboration .............................................. 4
   Setting preferences ................................................................. 4
   Specifying your mailbox preferences ....................................... 4

3 Using Secure Mailbox ................................................................. 6
   Delivery methods ................................................................. 6
   Secure Notification ............................................................... 6
   Secure Envelope ................................................................. 7
   Viewing messages and downloading attachments ....................... 7
   Composing and sending mail .................................................. 8
   Tracking messages ............................................................... 8
   Searching messages ............................................................. 8
   Moving messages ............................................................... 9
   Deleting messages ............................................................. 9
   Managing folders ............................................................... 9
   Creating folders ............................................................... 10
   Renaming folders ............................................................. 10
   Deleting folders ............................................................. 10

4 Using Secure Folder ................................................................. 11
   Managing folders ............................................................... 11
   Creating a folder ............................................................... 11
   Sharing a folder ............................................................... 11
   Unsharing a folder ............................................................ 12
   Renaming a folder ............................................................ 12
   Copying a folder ............................................................... 13
   Moving a folder ............................................................... 13
   Deleting a folder ............................................................. 13
   Managing files ................................................................. 13
   Uploading files ............................................................... 13
   Downloading files ............................................................ 14
   Renaming files ............................................................... 14
   Copying files ................................................................. 14
   Moving files ................................................................. 14
   Deleting files ................................................................. 15

5 Lists and reports ................................................................. 16
   Using the Mail History ......................................................... 16
   Managing trusted senders ...................................................... 16
   Managing blocked senders ..................................................... 17
The *FMI Secure Mail User’s Guide* introduces you to the Secure Collaboration component of FMI Secure Mail, which comprises two elements: Secure Mailbox and Secure Folder.

- Secure Mailbox is a secure email delivery solution that gives you the reliability and privacy not possible in most email clients. Secure Mailbox lets you send and receive messages and files securely and track the status of their delivery.

- Secure Folder enables registered users to share files and documents through interaction with other internal and external collaborators from the FMI Secure Mail End-users UI.

Contact your FMI Secure Mail Administrator to get registered for either of these capabilities.
This chapter provides instructions for configuring your Secure Collaboration email preference and includes the following sections:

- Setting preferences
- Security images
- Getting started

Setting preferences

When you log into Secure Collaboration, you can set your preferences for the following options:

- First and last name
- Password hint
- Language preference
- Change password
- Selecting security image
- Redirect action after sending message - Allows you to be redirected to the Sent Folder or to the Sent Confirmation Page once a message is sent.
- What type of notifications should be sent (HTML or text)
- Whether you want to be notified when recipients view the message
- Reporting and spam protection

Specifying your mailbox preferences

To change preferences, log into your mailbox and click on the Preferences link located at the upper right corner of the screen. If you are logging in for the first time, you might be redirected to the Preference page automatically, depending on your FMI Secure Mail setup. FMI Secure Mail options are set by your FMI Secure Mail Administrator, so some options described here may not be available to you.
1. Select your preferred language from the drop-down list.
2. (Optional) Change your password.
3. Select your security image.

The Security Image feature combats the threat presented by phishing. This ability is provided by a personal image that displays on the login page when you sign in. You can choose your own Security Image associated with your Secure Mailbox account.

You must enable cookies in your browser to use this feature. The next time you login from your computer, you should see the image you selected on the password page. If you see the security image you selected, enter your password and click Log In. If you do not see your security image, do not enter your password. Immediately notify your FMI Secure Mail administrator that you may be a victim of a phishing site.

4. Customize your secure messaging preferences, or use the default settings.

5. Use the default setting for Reporting and Spam Protection or customize them.

   If you select the radio button for Custom spam protection, additional options are displayed.

6. Click Save.
Using Secure Mailbox

Use Secure Mailbox to send and receive messages and files that require security. With Secure Mailbox, you can be sure that your email correspondence is kept confidential. You can also create and manage folders for and use various search filters to find specific messages that you have sent or received. A draft functionality is available as well. When you compose a message, it will be saved at regular intervals in the Drafts folder and remain there until you send it.

This chapter includes the following sections:

- Delivery methods
- Viewing messages
- Composing mail
- Message tracking
- Searching messages
- Moving messages
- Deleting messages
- Managing folders

Delivery methods

The Secure Mailbox component offers the following message delivery methods:

- Secure Notification
- Secure Envelope

Secure Notification

When a secure message is sent to you, Secure Mailbox generates a notification and sends it to your email account. The notification contains unique URL to the message which you can see after successful authentication in your Secure Mailbox account. The actual message never leaves the FMI Secure Mail server. Use the following procedure to view the message.

1. Visit the secure URL contained inside the notification.
2. Enter your password on the newly opened page.
3. Click Reply, Reply to All, or Forward to reply to or forward the message.

Depending on how your administrator has set up FMI Secure Mail, the Reply, Reply to All, or Forward options may not be available.
Secure Envelope

You have access to Secure Envelope only if your administrator has set up FMI Secure Mail for Secure Envelope delivery. Secure Envelope encapsulates any encrypted message content in an HTML attachment. To decrypt the message, you must open the HTML attachment using an Internet browser and enter your Secure Mailbox password. Secure Envelope supports both offline and online message viewing.

1. Open the message in your email client.
2. Download the HTML attachment containing the encrypted message.
3. Open the message in your browser.
4. Enter your Secure Mailbox password.

The HTML attachment is decrypted, and you can view the message.

Viewing messages and downloading attachments

1. Click on the folder where the message is located, usually your Inbox folder.
2. Click on the message Subject.

   The message is opened in a new tab.

3. (Optional) To download an attachment, select the check box next to the attachment and click **Save Selected Files**.

   Secure Mailbox displays all messages in plain text format to avoid execution of potentially harmful code that can be found in specifically forged messages.

4. To view an original message that has not been saved in plain text format, go to the folder where the message is located, usually your Inbox folder.

5. Click on the message Subject.

6. Click on **Original Version**.

   If the message was in HTML format, the original format will be displayed.
Composing and sending mail

1. Click **Compose Mail**.
2. In the To field, enter the mail address of the recipient. If you want to send the message to multiple recipients, their addresses must be separated by a comma.

3. (Optional) In the CC field, enter the mail address to which you want to copy the message. If you want to copy the message to multiple recipients, their addresses must be separated by a comma.

4. (Optional) In the BCC field, enter the email address to which you want to blind-copy the message. If you want to blind-copy the message to multiple recipients, their addresses must be separated by a comma.

   The BCC recipient address will not be visible to either the main recipient or the other copied recipients.

5. (Optional) Type a descriptive title for your email in the Subject line, and enter your message in the text area.

6. To attach a file, click **Attach File** at the bottom of the page, select the file in the Choose File dialog, and click **Open**.

   The file will start uploading. Wait until the upload finishes before sending the message.

7. Click **Send** to send the message.

   If you click **Discard**, then the message you composed will be deleted.

Tracking messages

You can track the status of any message you have sent.

1. To view the status of a message, go to the Sent Folder.

   The Tracking column displays the current status of the messages.

2. Click on the **Tracking** link next to the message to display detailed delivery status.

Searching messages

You can search for messages in particular folder or in any folder based on the following criteria:
1. Click **Search** under **SECURE MAILBOX**.
2. Select **Status** from the drop-down list. By default, status **All** is selected.
3. Specify the Sent date, the Expiration date, or both:
   - Select Today, Yesterday, Last, Week, Last Month, or Last Year from the **Any Date** drop-down list.
   - Enter the date in MM/DD/YYYY or MM/DD/YY format. Alternatively, click the Calendar icon to select the date.
4. Enter the Recipient Email.
5. Click **Search**.

Search results are displayed in the **Search Results** section of the page, providing options to **Delete** or **Move** any message.

6. For additional search options, click **Advanced Search**.
7. Enter the Subject line of the message or messages you want to retrieve.
8. Specify the Sender's email ID or the Recipient's email ID or both.

**Moving messages**

1. Mark the check boxes beside the messages you want to move. You can also move an open message.
2. From the drop down list, select the folder where you want to move the message(s) to.
3. Click **Move**.

**Deleting messages**

- Select the check box or boxes beside the message or messages you want to delete, and then click **Delete**.

**Managing folders**

The Inbox, Sent, and Draft folders are created for you by default. These folders cannot be deleted or renamed.

You can create, rename, and delete the folders you have created by clicking **Manage Folders** under **SECURE MAILBOX**.

You can sort the messages in any folder in:
- Ascending or descending order of the date the message was sent
- Ascending or descending order of the date the message expires
- Alphabetical order of the subject line
Managing folders

**Creating folders**

1. Go to Manage Folders.
2. Enter the name of the folder in the form field and click Create.
   
   A new folder is created and listed in the Mail section.

**Renaming folders**

1. Go to Manage Folders.
2. Select the check box next to the folder you want to rename.
3. Enter the new name of the folder in the newly opened pop-up and click OK.
   
   The folder is renamed.

**Deleting folders**

1. Go to Manage Folders.
2. Select the check box next to the folder you want to delete.
3. Click Delete.
   
   The folder and all the messages it contains are deleted.
Secure Folder is a file collaboration feature that delivers folder sharing and file management through an encrypted channel. With Secure Folder, you can create folders that are shared among other users, manage folder access permissions, and upload and download files.

This chapter includes the following sections:

- Managing folders
- Managing files

Managing folders

You can create, rename, copy, move, unshare, download, and delete folders. You can sort the files and folders in any folder in:

- Ascending or descending order of the date of the last modification
- Ascending or descending order of size
- Alphabetical order of the name

Creating a folder

1. From the **SECURE FOLDER** section, navigate to the place where you want to create a new folder.
2. Click **Create Folder**, enter the name of the folder you want to create, and click **OK**.

   A new folder is created and listed in the Folder section.

Sharing a folder

Sharing a folder allows others to access it. You control the permissions, allowing others to access the files only as you want them to.
1. Select the check box next to the folder you want to share and click **Sharing**. If the nested folder is shared with someone, and you decide to share the parent folder with someone else, the sharing permissions of the nested folder remain as originally set.

2. Enter the User Email address of the person you want to share this folder and click **Add**.

You can add as many User Email addresses as you want.

3. Select the radio button next to the permissions you want set for this folder.

   - **Download files** - Gives users permission to download files only
   - **Download and Upload files** - Gives users permission to download and upload files to the shared folder.
   - **Download, Upload and Overwrite files** - Gives users permission to download, upload, and update files to the shared folder.

   **NOTE:** Access permissions are per folder, not per user.

4. (Optional) Select the **Enable Notifications for newly added users** check box if you want the users with whom the folder is shared to receive notifications for the following:
   - Folder shared
   - Folder unshared
   - File uploaded

5. (Optional) Select the **Send notifications to me** check box if you want to receive email notifications when someone else uploads a file to a folder you own.

6. (Optional) Select the **Allow users to see with whom the folder is shared** check box if you want users to see the names of others who share this folder.

**Unsharing a folder**

1. Select the check box next to the folder you no longer want to share.
2. Click **Sharing** and then press the **Unshare** button.

   The selected folder is no longer shared.

**Renaming a folder**

1. Select the check box next to the folder you want to rename and click **Rename**.
2. Enter the new name of the folder in the newly opened pop-up and click **OK**.

   The folder is renamed.
Copying a folder

1. Select the check box next to the folder you want to copy, and press Copy.
   A pop-up window is displayed, showing available destinations for copying.

2. Select the destination for your folder and press Copy.
   If you copy a shared folder, the new copy will no longer be shared.
   If you copy a folder to a shared destination folder, the copied folder will be shared with the same collaborators and permissions.

Moving a folder

1. Select the check box next to the folder you want to move and press Move.
   A pop-up window is displayed, showing available destinations for moving.

2. Choose where you want to move your folder and press Move.

Deleting a folder

Deleting a folder deletes all the files and folders stored in that folder.

1. Select the check box next to the folder you want to delete.

2. Click Delete.

3. Click OK in the dialog box to confirm your decision.
   The folder and all the items it contains are deleted.

Managing files

You can upload, download, rename, copy, move, and delete any of the files in your folders. If you have enabled notifications, notifications will be sent to those who share the folder when you upload any files.

Uploading files

1. Open the folder into which you want to upload a file.

2. Click Upload.

3. Click Add and select the file you want to upload.

4. (Optional) Enter a description of the file.

5. Click Upload.
   The file is uploaded.
**Downloading files**

1. Click on name of the folder from which you want to download a file.
2. Select the check box(s) of the file(s) you want to download.
3. Click **Download**.
   
   The file is downloaded.

**Renaming files**

1. Open the folder containing the file you want to rename.
2. Select the check box next to the file you want to rename.
3. Click **Rename**.
4. Enter the new name in the pop-up dialog box.
5. Click **Rename**.

   The file is renamed.

**Copying files**

1. Open the folder containing the files you want to copy.
2. Select the check box next to the files you want to copy.
3. Click **Copy** and select the folder into which you want to copy the files.
4. Click **Copy**.

   The files are copied to the new folder.

**Moving files**

1. Open the folder containing the files you want to move.
2. Select the check box next to the files you want to move.
3. Click **Move** and select the folder into which you want to move the files.
4. Click **Move**.

   The files are moved to the new folder.
Deleting files

1. Open the folder containing the files you want to delete.
2. Select the check box next to the files you want to delete.
3. Click Delete.
4. Click OK in the dialog box to confirm your decision.

   The selected files are deleted.
FMI Secure Mail provides three options for lists and reports:

- Mail History
- Trusted Senders
- Blocked Senders

**Using the Mail History**

The FMI Secure Mail Administrator sets the enterprise-wide spam policy for incoming messages. You can check the spam report that is specific to your messages and make changes that affect only your messages. Depending on your FMI Secure Mail setup, some lists and reports might not be available.

- When you open the Mail History, you will see a list of unfiltered spam messages in the Search Result section of the page. They will be tagged as Junk, Bulk, or Legit. Use the Status check box to change the message designation or have it sent to you.
- To filter spam messages by type, select your preferred Message Type from the options in the drop-down list and click Search.

Only messages of the type you selected will be displayed in the Search Result section of the page.

- To filter spam messages by date received, select Message Received from the options in the drop-down list.

Only messages received in the time period you selected will be displayed in the Search Result section of the page.

**Managing trusted senders**

Trusted senders are senders with whom you correspond and whose messages you can be sure will not carry viruses. Your FMI Secure Mail Administrator may have programmed certain email addresses or domains of partners, suppliers, or customers. You can search for, add, or delete a specific sender or domain.
• To search by email address, select **Sender Email Address**, enter the address into the field, and click **Search**.
  
The results are displayed in the **Email Addresses** section.

• To search by email domain, select **Sender Email Domain**, enter the domain into the field, and click **Search**.
  
The results are displayed in the **Email Domains** section.

• To add a trusted sender, select **Sender Email**, enter the email address in the field, and click **Add**.
  
The sender is added to Trusted Senders.

• To delete a trusted sender, select **Sender Email**, enter the email address in the field, and click **Delete**.
  
The sender is deleted from Trusted Senders.

• To add a trusted domain, select **Sending Domain**, enter the domain name in the field, and click **Add**.
  
The domain is added to Trusted Domains.

• To delete a trusted domain, select **Sending Domain**, enter the domain name in the field, and click **Delete**.
  
The domain is deleted from Trusted Domains.

**Managing blocked senders**

Blocked senders are senders that you either do not trust or who are nuisances. Your FMI Secure Mail Administrator may have programmed certain email addresses or domains for senders your enterprise blocks. You can search for, add, or delete a specific sender or domain.
5 Managing blocked senders

- To search by email address, select **Sender Email Address**, enter the address into the field, and click **Search**. The results are displayed in the **Email Addresses** section.

- To search by email domain, select **Sender Email Domain**, enter the domain into the field, and click **Search**. The results are displayed in the **Email Domains** section.

- To block a sender, select **Sender Email**, enter the email address in the field, and click **Add**. The sender is added to **Blocked Senders**.

- To delete a blocked sender, select **Sender Email**, enter the email address in the field, and click **Delete**. The sender is deleted from **Blocked Senders**, and you can now receive their emails.

- To add a blocked domain, select **Sending Domain**, enter the domain name in the field, and click **Add**. The domain is added to **Blocked Domains**.

- To delete a blocked domain, select **Sending Domain**, enter the domain name in the field, and click **Delete**. The domain is deleted from **Blocked Domains**, and you can now receive emails from this domain.