
Confinet[®] Client Quick Reference

Release 1.1.0.a

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ABSI

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Contents

Contents

1	Installation	1
1.1	System requirements	1
1.2	Downloading the installation file	1
1.3	Verifying the installation file	1
1.3.1	Verifying an installation file on Windows	1
1.3.2	Verifying an installation file on macOS	2
1.3.3	Verifying an installation file on Linux	2
1.4	Installing on Windows	2
1.5	Installing on macOS	2
1.6	Installing on Ubuntu	3
1.7	Installing on Red Hat Enterprise Linux	3
2	Configuration	5
2.1	Confinet account creation notification	5
2.2	Network settings	6
2.3	Log on to Confinet	6
2.4	User options	7
2.4.1	Email notifications	7
2.4.2	Email address for notifications	7
2.4.3	Multi-factor authentication	8
2.5	Password reset	9
3	Documents	11
3.1	Creating documents	11
3.2	Renaming documents	12
3.3	Deleting documents	12
3.4	Editing documents	12
3.4.1	Basic editing tasks	13
3.4.1.1	Undoing an edit	13

CONTENTS

3.4.1.2	Redoing an edit	13
3.4.1.3	Delete the selection and copy it to the clipboard	13
3.4.1.4	Copy the selection to the clipboard	13
3.4.1.5	Insert text you have copied to the clipboard	13
3.4.1.6	Select all text in the document	13
3.4.2	Font style & weight	13
3.4.3	Font name	13
3.4.4	Font size	14
3.4.5	Text alignment	14
3.4.6	Text indentation	14
3.4.7	Text color	14
3.4.8	Inserting lists	14
3.4.9	Inserting lines	15
3.4.10	Inserting tables	15
3.4.11	Inserting icons	15
3.4.12	Inserting pictures	16
3.4.13	Formatting lists	16
3.4.14	Formatting tables	16
3.4.15	Finding text	17
3.4.16	Replacing text	17
3.5	Document spelling	18
3.6	Document revisions	18
3.7	Printing documents	18
3.7.1	Printing a document	18
3.7.2	Previewing a document	19
3.8	Exporting documents	19
3.8.1	Exporting to a text file	19
3.8.2	Exporting to a PDF file	19
3.9	Restoring documents	20
3.10	Attaching URLs to documents	20
4	Sharing Documents	23
4.1	Document keys	23
4.1.1	Document key permissions	24
4.1.2	Document key attributes	26
4.2	Viewing document keys created for you	27
4.3	Creating document keys for others	28
4.3.1	Opening a document keyring	29
4.3.2	Starting the Create Document Key wizard	29
4.3.3	Document key document revision	30
4.3.4	Document key permissions	30

4.3.5	Document key active status	30
4.3.6	Document key active months	30
4.3.7	Document key active days	31
4.3.8	Document key active hours	31
4.3.9	Document key session duration	31
4.3.10	Document key expiration date	31
4.3.11	Document key passcode	32
4.3.12	Document key users	32
4.3.13	Document key confirmation	32
4.4	Updating document keys	32
4.4.1	Updating the document revision of a document key	33
4.4.2	Updating the permissions of a document key	34
4.4.3	Updating the active status of a document key	34
4.4.4	Updating the active months of a document key	34
4.4.5	Updating the active days of a document key	34
4.4.6	Updating the active hours of a document key	35
4.4.7	Updating the session duration of a document key	35
4.4.8	Updating the expiration date of a document key	35
4.4.9	Updating the passcode of a document key	36
4.5	Deleting document keys	36
5	Folders	37
5.1	Creating folders	37
5.2	Renaming folders	37
5.3	Deleting folders	38
5.4	Searching folders	38
6	Sharing Folders	39
6.1	Folder keys	39
6.1.1	Folder key permissions	40
6.1.2	Folder key attributes	40
6.2	Viewing folder keys created for you	42
6.3	Creating folder keys for others	42
6.3.1	Opening a folder keyring	43
6.3.2	Starting the Create Folder Key wizard	44
6.3.3	Folder key permissions	44
6.3.4	Folder key active status	44
6.3.5	Folder key active months	44
6.3.6	Folder key active days	45
6.3.7	Folder key active hours	45
6.3.8	Folder key session duration	45

CONTENTS

6.3.9	Folder key expiration date	45
6.3.10	Folder key passcode	45
6.3.11	Folder key users	46
6.3.12	Folder key confirmation	46
6.4	Updating folder keys	46
6.4.1	Updating the permissions of a folder key	47
6.4.2	Updating the active status of a folder key	47
6.4.3	Updating the active months of a folder key	47
6.4.4	Updating the active days of a folder key	47
6.4.5	Updating the active hours of a folder key	48
6.4.6	Updating the session duration of a folder key	48
6.4.7	Updating the expiration date of a folder key	48
6.4.8	Updating the passcode of a folder key	49
6.5	Deleting folder keys	49
7	Messages	51
7.1	Message permissions	51
7.1.1	Message content permissions	52
7.1.2	Message user permissions	53
7.2	Creating messages	53
7.2.1	Message content	54
7.2.2	Message recipients	54
7.2.3	Message attachments	54
7.3	Viewing and replying to messages	55
7.3.1	Viewing a message	55
7.3.2	Replying to a message	55
7.3.3	Filtering a message thread by permissions	56
7.4	Editing messages	57
7.4.1	Editing message content	58
7.4.2	Editing message recipients	58
7.4.3	Editing message permissions	58
7.4.4	Editing message attachments	58
7.5	Deleting messages	59
7.5.1	Referenced messages	59
7.6	Searching messages	59
7.7	Message folders	60
7.7.1	Creating, renaming, and deleting message folders	60
8	Home Groups and Personal Groups	61
8.1	Home Groups	61
8.2	Personal Groups	61

8.2.1	Creating a personal group	61
8.2.2	Adding a user to a personal group	62
8.2.3	Removing a user from a personal group	62
8.2.4	Deleting a personal group	62
9	Picture Directories	63
9.1	Picture formats	64
9.2	Picture references	64
9.3	Picture directories	64

Chapter 1

Installation

1.1 System requirements

The Confinet Client can be installed on the Windows (x86_64), macOS (Intel-based Macs and Apple Silicon Macs), and Linux (x86_64 and ARM64) operating systems. If you need administrator privileges to install the Confinet Client, please seek the assistance of your System Administrator.

1.2 Downloading the installation file

Unless your organization has instructed you otherwise, you may download the latest version of the Confinet Client installation file from the Confinet website (www.confinet.us).

1.3 Verifying the installation file

If you need to verify the integrity of a Confinet installation file, you can do so by computing the SHA-256 hash value of the installation file and comparing it with the value posted on the Confinet website.

1.3.1 Verifying an installation file on Windows

You can use the **Get-FileHash** PowerShell cmdlet to verify the integrity of a Confinet installation file on Windows.

1.3.2 Verifying an installation file on macOS

You can use the command-line utility **shasum -a 256** to verify the integrity of a Confinet installation file on macOS.

1.3.3 Verifying an installation file on Linux

You can use the command-line utility **sha256sum** to verify the integrity of a Confinet installation file on Linux.

1.4 Installing on Windows

To install the Confinet Client on Windows:

1. Download the appropriate Confinet Client installation file.
2. Verify the integrity of the installation file if necessary.
3. Open the folder containing the installation file.
4. Double-click the installation file.
5. When presented with the License Page, read the license agreement.
6. Indicate your acceptance of the license by clicking the check box.
7. Click **Install** to begin the installation.
8. Click **Finish** to finish the installation.

1.5 Installing on macOS

To install the Confinet Client on macOS:

1. Download the appropriate Confinet Client macOS disk image file.
2. Verify the integrity of the disk image file if necessary.
3. Double-click the disk image file.
4. Drag and drop the Confinet Client icon into the Applications folder.
5. From the Applications folder, drag the Confinet Client icon onto the Dock (optional).

1.6 Installing on Ubuntu

To install the Confinet Client on Ubuntu:

1. Download the appropriate Confinet Client DEB package.
2. Verify the integrity of the DEB package file if necessary.
3. Double-click the DEB package file.
4. Click **Install** to install the Confinet Client.¹

1.7 Installing on Red Hat Enterprise Linux

To install the Confinet Client on Red Hat Enterprise Linux, AlmaLinux, or Oracle Linux:

1. Download the appropriate Confinet Client RPM package.
2. Verify the integrity of the RPM package file if necessary.
3. Double-click the RPM package file.
4. Click **Install** to install the Confinet Client.²

¹Use the command **sudo apt install ./client.deb** to install the DEB package from the command line.

²Use the command **sudo dnf install ./client.rpm** to install the RPM package from the command line.

Chapter 2

Configuration

Before you attempt to log on to Confinet, you should first configure your network settings. After you have configured your network settings, you can log on to Confinet. After you log on, you should set your user options to enable email notifications and multi-factor authentication (MFA).

2.1 Confinet account creation notification

When a Confinet account is created for you, you will receive a Confinet Account Creation Notification email.

The Confinet Account Creation Notification will provide you with *your* account settings:

- *User name*
- *User password*¹
- *Confinet server name*
- *Confinet server port*

Table 2.1 provides a short description of these settings and their usage.

¹For your security, please change the password *immediately* after your first logon. See Section 2.5.

Table 2.1: Confinet Account Settings

Setting	Description	Usage
User name	Confinet account name	Used in Log On dialog
User password	Confinet account password	Used in Log On dialog
Server name	Confinet server name	Used in Network Settings dialog
Server port	Confinet server port	Used in Network Settings dialog

2.2 Network settings

To configure your network settings:²

1. Set the focus to the Console window.
2. From the **Edit** menu, click **Network Settings**.
 ↪ The system displays the Network Settings dialog
3. Set the Server name to the value you were given in your account creation notification.
4. Set the Server port to the value you were given in your account creation notification.
5. Set the Default time zone to *your* time zone.
6. Click **OK** to save your network settings.

2.3 Log on to Confinet

To log on with your account credentials:

1. Set the focus to the Console window.
2. From the **File** menu, click **Log On**.
 ↪ The system displays the Log On dialog
3. Enter the User name you were given in your account creation notification.
4. Enter the User password you were given in your account creation notification.³
5. Click the **OK** button.

²You only need to do this *once*; your settings will be remembered.

³For your security, Confinet will *not* save your password on your device.

2.4 User options

You can set your user options to control email notifications and multi-factor authentication.

To view your user options:

1. Set the focus to the Console window.
2. From the **Tools** menu, click **Options**.

↪ The system displays the User Options dialog

2.4.1 Email notifications

To receive email notifications when a user shares a document with you, click **Notify me when a user shares a document with me**.

To receive email notifications when a user shares a message with you, click **Notify me when a user shares a message with me**.

Click **Save** to save your settings.

2.4.2 Email address for notifications

You can change the email address associated with your Confinet account, if necessary. In order to change the email address associated with your Confinet account, you must first show that you own the new email address. This is done by means of a Confinet User Email Address Reset Authorization Code.

To change the email address associated with your account:

1. Click the **Set...** button.
2. Enter the new email address.
3. Confirm the new email address by entering it again and click **OK**.

↪ The system displays the Email Address Reset Authorization Code Dialog

4. Get the authorization code from the *new* email address.
5. Enter the authorization code in the Email Address Reset Authorization Code Dialog.

6. Click **OK** to change the email address associated with your account.
7. Click **Save** to save your settings.

2.4.3 Multi-factor authentication

You can and *should* enable multi-factor authentication for your Confinet account.

After you enable multi-factor authentication, please be aware of the following:

- You will need an authorization code every time you log on to your account.
- Authorization codes will be sent to the email address associated with your account.
- If you lose access to your email address, you will not be able to access your account.
- If you *do* lose access to your email address, contact the Confinet Administrator.

To enable multi-factor authentication for your Confinet account:

1. Click **Enable multi-factor authentication for your account...**
 - ↪ The system displays the Enable Multi-Factor Authentication dialog
2. Click **Proceed** to continue.
 - ↪ The system displays the Enable Multi-Factor Authentication Authorization Code dialog
3. Get the authorization code from the email address associated with your Confinet account.
4. Enter the authorization code in the Enable Multi-Factor Authentication Authorization Code dialog.
5. Click **OK** to enable multi-factor authentication for your Confinet account.
6. Click **Save** to save your settings.

To disable multi-factor authentication for your Confinet account:

1. Click **Disable multi-factor authentication for your account...**
 - ↪ The system displays the Disable Multi-Factor Authentication dialog
2. Click **Proceed** to continue.
 - ↪ The system displays the Disable Multi-Factor Authentication Authorization Code dialog

3. Get the authorization code from the email address associated with your Confinet account.
4. Enter the authorization code in the Disable Multi-Factor Authentication Authorization Code dialog.
5. Click **OK** to disable multi-factor authentication for your Confinet account.
6. Click **Save** to save your settings.

2.5 Password reset

To reset your password:

1. Set the focus to the Console window.
2. From the **Tools** menu, click **Reset Password...**
 - ↪ The system displays the Reset Password Wizard Introduction
3. Click **Next**.
 - ↪ The system displays the Reset Password Wizard Reset Password Authentication
4. Enter your *current* user name and password.
5. Click **Next**.
 - ↪ The system displays the Reset Password Wizard Reset Password Settings
6. Enter your *new* password; confirm your new password by entering it again.
7. Click **Commit** to change your password.

Chapter 3

Documents

Confinet lets you create documents that can display formatted text, tables, bullet lists, pictures, and more.

This chapter will discuss the following tasks:

1. Creating a document
2. Renaming a document
3. Deleting a document
4. Editing a document
5. Spell-checking a document
6. Viewing a previous revision of a document
7. Printing a document
8. Exporting a document
9. Restoring a document
10. Attaching URLs to a document

3.1 Creating documents

To create a document in a Document Browser window:

1. From the **File** menu, click **New** and then click **Document**.

↔ The system displays the Create Document dialog

2. Enter the name of the new document in the **Document name** field.
3. Enter a description for the new document in the **Document description** field. ¹
4. Click **OK** to create the new document.

3.2 Renaming documents

To rename a document in a Document Browser window:

1. Select the document you want to rename.
2. From the **Edit** menu, click **Rename**.

↔ The system displays the Rename Document dialog

3. Enter the new name of the document in the **New document name** field.
4. Click **OK** to rename the document.

3.3 Deleting documents

To delete a document in a Document Browser window:

1. Select the document you want to delete.
2. From the **Edit** menu, click **Delete**.

↔ The system displays the Delete Document confirmation

3. Click **OK** to confirm your decision to delete the document.

3.4 Editing documents

To edit the contents of a document, open the document in a Document Editor window. Use the Document Editor window **Edit** menu to perform basic editing tasks.

¹The description will be displayed when the user moves the pointer over the document.

3.4.1 Basic editing tasks

3.4.1.1 Undoing an edit

From the **Edit** menu, click **Undo**.

3.4.1.2 Redoing an edit

From the **Edit** menu, click **Redo**.

3.4.1.3 Delete the selection and copy it to the clipboard

From the **Edit** menu, click **Cut**.

3.4.1.4 Copy the selection to the clipboard

From the **Edit** menu, click **Copy**.

3.4.1.5 Insert text you have copied to the clipboard

From the **Edit** menu, click **Paste**.

3.4.1.6 Select all text in the document

From the **Edit** menu, click **Select All**.

3.4.2 Font style & weight

Select the font style and weight from the Formatting toolbar.

To make the selected text bold, click **Format Bold**  in the Formatting toolbar.

To make the selected text italic, click **Format Italic**  in the Formatting toolbar.

To underline the selected text, click **Format Underline**  in the Formatting toolbar.

3.4.3 Font name

To change the font of the selected text, select the font name from the **Font Name** list in the Formatting toolbar.

3.4.4 Font size

To change the font size of the selected text, select the font size from the **Font Size** list in the Formatting toolbar.

3.4.5 Text alignment

Selected text can be aligned flush left, centered, flush right, or justified.

To align the selected text flush left, click **Align Left**  in the Formatting toolbar.

To center the selected text, click **Align Center**  in the Formatting toolbar.

To align the selected text flush right, click **Align Right**  in the Formatting toolbar.

To justify the selected text, click **Align Justified**  in the Formatting toolbar.

3.4.6 Text indentation

You can increase or decrease the indentation of selected text.

To increase the indentation of the selected text, click **Increase Indent**  in the Formatting toolbar.

To decrease the indentation of the selected text, click **Decrease Indent**  in the Formatting toolbar.

3.4.7 Text color

To change the color of the selected text, select the color from the **Font Color** list in the Formatting toolbar.

3.4.8 Inserting lists

From the **Insert** menu, you can insert lists with one of the following styles:

1. Bullet List Circles
2. Bullet List Filled Circles
3. Bullet List Filled Squares
4. Ordered List Decimal Values
5. Ordered List Uppercase Latin Characters

6. Ordered List Lowercase Latin Characters
7. Numbered List Uppercase Roman Numerals
8. Numbered List Lowercase Roman Numerals

3.4.9 Inserting lines

From the **Insert** menu, you can insert a line by clicking **Line**.

3.4.10 Inserting tables

To insert a table:

1. From the **Insert** menu, click **Table**.
↔ The system displays the Insert Table dialog
2. From the **Alignment** list, select the cell alignment.
3. In the **Cell padding** field, click the arrows to select a value.
4. In the **Cell spacing** field, click the arrows to select a value.
5. In the **Rows** field, click the arrows to select the number of rows.
6. In the **Columns** field, click the arrows to select the number of columns.
7. From the **Column widths** list, select a column width in order to edit its value.
8. To insert a table with your selections, click **OK**.

After you insert a table, you can increase or decrease its rows and columns to suit your needs.

3.4.11 Inserting icons

To insert an icon:

1. From the **View** menu, click **Icon Toolbar**.
↔ The system displays the **Icon Toolbar**
2. In the **Icon Toolbar**, select the icon set.
3. In the **Icon Toolbar**, select the icon size.
4. In the **Icon Toolbar**, select the icon you want to insert.

3.4.12 Inserting pictures

To insert a reference to a picture file into a document:

1. From the **Insert** menu, click **Picture**.
↪ The system displays the Open File dialog
2. Select a picture file.
3. To insert a reference to the picture file into the document, click **Open**.

3.4.13 Formatting lists

From the **Format** menu, you can format text as one of the following lists:

1. Bullet List Circles
2. Bullet List Filled Circles
3. Bullet List Filled Squares
4. Ordered List Decimal Values
5. Ordered List Uppercase Latin Characters
6. Ordered List Lowercase Latin Characters
7. Numbered List Uppercase Roman Numerals
8. Numbered List Lowercase Roman Numerals

You can also *remove* list formatting by clicking **No Text List**.

3.4.14 Formatting tables

The Document Editor window **Table** menu allows you to perform the following operations:

1. Insert a row
2. Insert a column
3. Set the column width of a column
4. Delete a row
5. Delete a column

3.4.15 Finding text

To search for text in a document:

1. From the **Edit** menu, click **Find**.
↔ The system displays the Find Text dialog
2. Enter the text you are searching for in the **Find what** field.
3. To search forward, click **Search forward**; to search backward, click **Search backward**.
4. To perform a case insensitive search, click **Case insensitive**; to perform a case sensitive search, click **Case sensitive**.
5. To match only complete words, click the **Match only complete words** check box.
6. To find the first match, click **Find**; to find all matches, click **Find All**.

3.4.16 Replacing text

To find and replace text in a document:

1. From the **Edit** menu, click **Replace**.
↔ The system displays the Find and Replace Text dialog
2. Enter the text you are searching for in the **Find what** field.
3. Enter the replacement text in the **Replace with** field.
4. To search forward, click **Search forward**; to search backward, click **Search backward**.
5. To perform a case insensitive search, click **Case insensitive**; to perform a case sensitive search, click **Case sensitive**.
6. To match only complete words, click the **Match only complete words** check box.
7. To find and replace the first match, click **Replace**; to replace all matches, click **Replace All**.

3.5 Document spelling

To check and correct spelling errors in a document:

1. From the **Tools** menu, click **Check Spelling**.
↔ The system displays the Spell Checker dialog
2. To ignore the first occurrence of an unknown word, click **Ignore**.
3. To ignore all occurrences of an unknown word, click **Ignore All**.
4. To change the first occurrence of an unknown word to a suggested word, select the suggested word and click **Change**.
5. To change all occurrences of an unknown word to a suggested word, select the suggested word and click **Change All**.
6. To add an unknown word to your personal dictionary, click **Add to Dictionary**.
7. To close the Spell Checker dialog, click **Close**.

3.6 Document revisions

You can view any revision of any document you have created.

To view document revisions, from the **View** menu, click **Revision History for *document name***.

To view the contents of a revision of the document, click on the revision date.

3.7 Printing documents

After you open a document in a Document Editor window, you can print its contents.

3.7.1 Printing a document

To print the contents of a document:

1. From the **File** menu, click **Print**.
↔ The system displays the Print dialog
2. Select a printer.
3. To print the contents of the document, click **Print**.

3.7.2 Previewing a document

To preview the contents of a document:

1. From the **File** menu, click **Print Preview**.
↔ The system displays the Print Preview dialog
2. To print the contents of the document, click **Print** .

3.8 Exporting documents

After you open a document in a Document Editor window, you can export its contents to a text file or a PDF file.

3.8.1 Exporting to a text file

To export the contents of a document to a text file:

1. From the **File** menu, click **Export to Text File**.
2. Select the directory where you want the text file to be created.
3. Enter the name of the file in the **File name** field.
4. To export the contents of the document to the file, click **Save**.

3.8.2 Exporting to a PDF file

To export the contents of a document to a PDF file:

1. From the **File** menu, click **Export to PDF File**.
2. Select the directory where you want the PDF file to be created.
3. Enter the name of the file in the **File name** field.
4. To export the contents of the document to the file, click **Save**.

3.9 Restoring documents

From the Console window, you can restore any document you have deleted.²

To restore a document you have deleted:

1. From the **Tools** menu, click **Restore Document**.
↔ The system displays the Restore Document wizard
2. To select the document to be restored, click **Next**.
3. Specify the date range during which the document was deleted.
4. Select the document you want to restore.
5. Select the revision of the document you want to restore and click **Next**.
6. Select the folder in which the document is to be restored and click **Next**.
7. To restore the document, click **Finish**.

By default, the latest revision of the document will be restored in the original folder that contained it. If the original folder containing the document has been deleted, you will be given the option to select an existing folder in which to restore the document.

3.10 Attaching URLs to documents

You can attach one or more HTTPS URLs to a Confinet document.³

These can include URLs like the following:

1. Standard webpages
2. OneDrive cloud documents
3. SharePoint cloud documents
4. Google Docs cloud documents
5. Box cloud documents
6. Media & video links

²You can also restore any *previous* revision of a document, if desired.

³An HTTPS URL has an https prefix (technically known as a *scheme* or *protocol*).

7. Image links

Confinet will only allow you to attach an HTTPS URL to a document. For example, the URL `http://foo.com` would *not* be allowed (while `https://foo.com` would be allowed).

Note that no application, including Confinet, has any way of knowing what content a URL points to; thus, Confinet *cannot* protect you from URLs that may be linked to malware.

Do not click on a URL attached to a Confinet document unless you are sure it is safe.

If possible, avoid the use of URLs and use Confinet documents and messages instead for sensitive information.

To view a document's URL attachments: from the **View** menu, click **View URL Attachments for *document name***.

You can also view a document's URL attachments *by default* via the Document Editor window options.

To view a document's URL attachments in a Document Editor window by default:

1. From the **Tools** menu, click **Options**.
 ↔ The system displays the Document Editor Options dialog
2. In the URL Attachments Dock Widget Options Pane, enable **Display by Default**.

To open, add, edit, or remove a document's URL attachment:

1. To open a URL, select it and click the **Open URL** button.
2. To add a URL, drag and drop the URL into the URL Attachments for *document name* window.⁴
3. To edit the label of a URL, select it and click the **Edit label** button.
4. To remove a URL, select it and click the **Remove URL** button.

⁴Or, click the **Add URL** button and enter the URL manually.

Chapter 4

Sharing Documents

4.1 Document keys

The purpose of a document key is to allow users to share their documents with other users in a secure manner.

A document key is associated with the following:

- A document
- A document key holder
- A set of permissions
- A set of attributes
- A status which is either *active* or *inactive*

The owner of a document creates a document key for the document in order to share the contents of the document with another user: the *document key holder*.

At any given point in time, the status of a document key is either *active* or *inactive*.

If a document key is inactive, the contents of the document associated with it cannot be viewed by the document key holder.¹

¹Assuming the document key holder has not *already* opened the document (*before* the status of the document key became inactive).

4.1.1 Document key permissions

The permissions associated with a document key determine what the document key holder is allowed to do with the contents of the document associated with the document key.

In order to meet the demands of real-world use cases, document keys grant (or deny) the following permissions in regard to the contents of the document associated with a document key:

Permission	Group
Allow the contents of the document to be <i>viewed</i>	lossless
Allow the contents of the document to be <i>updated</i>	lossless
Allow the contents of the document to be <i>copied from the clipboard</i>	lossless
Allow the contents of the document to be <i>copied to the clipboard</i>	lossy
Allow the contents of the document to be <i>exported to a text file</i>	lossy
Allow the contents of the document to be <i>exported to a PDF file</i>	lossy
Allow the contents of the document to be <i>printed</i>	lossy
Allow the contents of the document to be <i>searched</i>	lossless

Table 4.1: Document key permissions

These permissions are divided into two groups: *lossy* and *lossless*. In this context, the terms *lossy*² and *lossless* refer to a permission's potential impact on information security.

If you enable *lossy* permissions for document key holders, you *explicitly* give them a means by which they can easily convey the contents of the document associated with a document key to others *without* your knowledge or authorization.

By contrast, enabling *lossless* permissions does *not* give document key holders an explicit means by which they can easily convey information to unauthorized parties.³

²These terms are borrowed from the field of data encoding technology. Lossy data encoding algorithms can, and often do, degrade the quality of the data to which they are applied; likewise, *lossy* permissions can, and often do, degrade the security of the information to which they are applied.

³However, you should be aware that nothing can prevent a criminal from utilizing screen capture utilities to steal confidential information. When handling confidential information, measures should be taken to make it impossible (or a violation of policy) for the members of an organization to install or use such utilities.

The various document key permissions are described in detail below.⁴

Allow the contents of the document to be *viewed*. If this permission is enabled, the document key holder can view the contents of the document. Note: Unless this permission is enabled, any other permission will be irrelevant and ignored.

Allow the contents of the document to be *updated*. If this permission is enabled, the document key holder will be allowed to update the contents of the document. Note: Unless this permission is enabled, any other permission that would allow the contents of the document to be updated in any way will be ignored.

Allow the contents of the document to be *copied from the clipboard*. If this permission is enabled, the document key holder will be allowed to modify the document by pasting the contents of the clipboard into the document at a desired location.

Allow the contents of the document to be *copied to the clipboard*. If this lossy permission is enabled, the document key holder will be allowed to copy the contents of the document to the clipboard. **CAUTION: The owner of the document should take care when enabling this permission, since it could allow the document key holder to use the clipboard to copy the contents of the document to a file or third-party application (for example, an email client) for distribution to others without authorization.**

Allow the contents of the document to be *exported to a text file*. If this lossy permission is enabled, the document key holder will be allowed to export the contents of the document to a text file. **CAUTION: The owner of the document should take care when enabling this permission, since it could allow the document key holder to export the contents of the document to an editable text file for distribution to others without authorization.**

Allow the contents of the document to be *exported to a PDF file*. If this lossy permission is enabled, the document key holder will be allowed to export the contents of the document to a PDF file. **CAUTION: The owner of the document should take care when enabling this permission, since it could allow the document key holder to export the contents of the document to a PDF file for distribution to others without authorization.**

Allow the contents of the document to be *printed*. If this lossy permission is enabled, the document key holder will be allowed to print the contents of the document. **CAUTION: The owner of the document should take care when enabling this permission, since it could allow the document key holder to print the contents of the document and then distribute the**

⁴Remember that you can enable or *disable* these permissions at *any* time.

printed material to others without authorization.

Allow the contents of the document to be searched. If this permission is enabled, the document key holder will be allowed to search the contents of the document using full-text search capabilities.⁵

4.1.2 Document key attributes

The attributes of a document key determine *when* and *how* a document key can be accessed by the document key holder. A document key has the following attributes:

Active status	optional
Active months of the year	optional
Active days of the week	optional
Active hours of the day	optional
Session duration	optional
Expiration date	mandatory
Passcode	optional
Document revision	optional

Table 4.2: Document key attributes

Of these attributes, only the document key expiration date is mandatory.

These attributes are described below.

Active status. This attribute allows the owner of the document to specify the active status of the document key. This attribute overrides any other attribute that affects the status of the document key.

Active months of the year. This attribute allows the owner of the document to specify the months of the year during which the document key is active.

Active days of the week. This attribute allows the owner of the document to specify the days of the week on which the document key is active.

Active hours of the day. This attribute allows the owner of the document to specify the hours of the day during which the document key is active.

⁵This assumes the document key holder also has a folder key for the folder containing the document and the *search* permission of the folder key has been enabled. See Chapter 6.

Session duration. This attribute allows the owner of the document to specify a session duration for the document key. A session duration is specified in minutes or seconds and controls the amount of time the document can be displayed after it has been opened by the document key holder. Once the session duration expires, the document will be *automatically* closed.

Expiration date. Every document key *must* have an expiration date. After the expiration date of a document key has been reached, the document key will become inactive.⁶

Passcode. The owner of a document can associate a passcode with a document key. If this is done, the document key holder will need to enter the passcode before he or she can open the document that is associated with the document key.

Document revision. By default, the current revision of a document is associated with a document key. However, the owner of a document can associate a previous revision of a document with a document key. In this case, since a previous revision of a document cannot be changed, any permissions that would allow the document key holder to update the contents of the document will be ignored.

4.2 Viewing document keys created for you

This section will discuss how you can view document keys created *for you* by others.

The My Document Keyring window allows you to view the permissions and attributes associated with document keys created for you by *other users*.

To view document keys created for you by other users:

1. Set the focus to the Console window.
2. From the **File** menu, click **New** and then click **My Document Keyring**.
 ↪ The system displays the My Document Keyring window
3. From the **View** menu, click **View Months** to view the months during which the document keys are active.
4. From the **View** menu, click **View Days** to view the days of the week on which the document keys are active.

⁶However, the owner of the document can reset the expiration date of a document key to a later date at any time.

5. From the **View** menu, click **View Permissions** to view the permissions of the document keys.

If a document key has *restricted hours*, you will see the restricted hours in the **Hours** column and the associated time zone in the **Region** column.

Click on the column headers to sort the document keys by any of the following:

- Document name
- Document owner
- Document key creation date
- Document key expiration date

From the **File** menu, click **Open Document** to open the document associated with the currently selected document key.

4.3 Creating document keys for others

This section will discuss how you can create document keys *for others*.

Creating a document key for a document involves the following steps:

1. Opening the document keyring for the document.
2. Starting the Create Document Key wizard.
3. Selecting the revision of the document associated with the document key.⁷
4. Selecting the permissions associated with the document key.⁸
5. Enabling or disabling the active status of the document key.⁹
6. Selecting the months of the year during which the document key will be active.¹⁰
7. Selecting the days of the week on which the document key will be active.¹¹

⁷By default, the document key will be associated with the *latest* revision of the document.

⁸By default, the document key will have the *view* and *search* permissions.

⁹By default, the document key will have an *active* status.

¹⁰By default, the document key will be active on *every month of the year*.

¹¹By default, the document key will be active on *every day of the week*.

8. Selecting the hours of the day during which the document key will be active.¹²
9. Selecting the session duration that will be associated with the document key.¹³
10. Selecting the expiration date that will be associated with the document key.¹⁴
11. Selecting a passcode for the document key.¹⁵
12. Selecting the users for whom a copy of the document key will be created.
13. Confirming your choices and selections.

Most of these steps are *optional* and have reasonable default values.

The following sections describe each of these steps.

4.3.1 Opening a document keyring

In order to create a document key for a document, you must first open the document keyring associated with the document.

To open the document keyring associated with a document:

1. In a Document Browser window, open the folder containing the document.
2. Select the document.
3. From the **Edit** menu, click **Open Keyring**.

↔ The system displays the Document Keyring window

4.3.2 Starting the Create Document Key wizard

To start the Create Document Key wizard:

1. From the **File** menu, click **New**.

↔ The system displays the Create Document Key wizard

2. To proceed to the next step, click **Next**.

¹²By default, the document key will be active during *every hour of the day*.

¹³By default, viewing the document will *not* be limited to a session duration.

¹⁴By default, the expiration date will be *one year from the current date*; however, you can select any date after the *current* date.

¹⁵By default, the document key will have *no* passcode.

4.3.3 Document key document revision

This page of the Create Document Key wizard allows you to select the revision of the document to be associated with the document key.

To associate the document key with the current (latest) revision of the document, click **Current revision**.

To associate a previous revision of the document with the document key, click **Previous revision**, and then select the previous revision of the document you want to associate with the document key.

To proceed to the next step, click **Next**.

4.3.4 Document key permissions

This page of the Create Document Key wizard allows you to select the permissions that will be granted to the document key holder.

These permissions allow the contents of the document to be *viewed, updated, copied from the clipboard, copied to the clipboard, exported to a text file, exported to a PDF file, printed, or searched*.

To proceed to the next step, click **Next**.

4.3.5 Document key active status

This page of the Create Document Key wizard allows you to select the *active status* of the document key.

A document key can be *active* or *inactive*; however, only an active document key will grant the document key holder access to the document associated with the document key.

To create an active document key, select **Enable active status**; to create a document key that is initially inactive, clear **Enable active status**.

To proceed to the next step, click **Next**.

4.3.6 Document key active months

This page of the Create Document Key wizard allows you to select the months of the year during which the document key will be active.

To proceed to the next step, click **Next**.

4.3.7 Document key active days

This page of the Create Document Key wizard allows you to select the days of the week on which the document key will be active.

To proceed to the next step, click **Next**.

4.3.8 Document key active hours

This page of the Create Document Key wizard allows you to select the hours of the day during which the document key will be active.

To proceed to the next step, click **Next**.

4.3.9 Document key session duration

This page of the Create Document Key wizard allows you to specify a session duration for the document key.

A session duration determines the amount of time the document may be viewed during one session (a session begins immediately after the document has been opened).

After the session duration has elapsed, the document will be *automatically* closed.

To proceed to the next step, click **Next**.

4.3.10 Document key expiration date

This page of the Create Document Key wizard allows you to select an expiration date for the document key.

After the expiration date of a document key has been reached, the document key becomes inactive.

To proceed to the next step, click **Next**.

4.3.11 Document key passcode

This page of the Create Document Key wizard allows you to specify a passcode¹⁶ for the document key.

If you specify a passcode for a document key, the document key holder will need to enter the passcode before the document associated with the document key can be accessed.

To proceed to the next step, click **Next**.

4.3.12 Document key users

This page of the Create Document Key wizard allows you to select the users for whom a copy of the document key will be created.

You can select users from your Home Groups or your personal groups.

To proceed to the next step, click **Next**.

4.3.13 Document key confirmation

This page of the Create Document Key wizard allows you to confirm your selections.

If you have selected one user, click **Finish** to create a document key for the user based upon your selections.

If you have selected more than one user, click **Finish** to create a document key for *each* user based upon your selections.

The new document keys will be displayed in the Document Keyring window.

4.4 Updating document keys

You can update the permissions and attributes of document keys at any time.

Specifically, you can update any of the following whenever required:

- The document revision associated with a document key

¹⁶Passcodes provide a defense against covert key logging (and key loggers) since passcodes are not entered via a keyboard.

- The permissions of a document key
- The active status of a document key
- The active months associated with a document key
- The active days associated with a document key
- The active hours associated with a document key
- The session duration associated with a document key
- The expiration date associated with a document key
- The passcode associated with a document key

4.4.1 Updating the document revision of a document key

There may be scenarios where you do not want to share the *current* revision of a document with a user.

For example, you may not want to share the latest revision of a report that you are in the process of updating. In this case, you have the ability to associate a *previous* revision of the report with the document key. After you update the report, you can then set the revision associated with the document key to the current revision; this would allow the user to see the updated revision of the report.

To update the document revision associated with a document key:

1. Select the document key.
2. From the **Edit** menu, click **Set Document Revision**.
↪ The system displays the Set Document Revision wizard
3. To continue, click **Next**.
 - To associate the current revision of the document with the document key, click **Current revision**.
 - To associate a previous revision of the document with the document key, click **Previous revision** and select the revision of the document that you want to associate with the document key.
4. To continue, click **Next**.
5. To confirm your selection and update the document key, click **Finish**.

4.4.2 Updating the permissions of a document key

To update the permissions associated with a document key:

1. Select and expand the document key.
2. Expand **Permissions**.
3. Select or clear the check boxes of the permissions you want to update.
4. To save your changes, from the **File** menu, click **Save**.

4.4.3 Updating the active status of a document key

To update the active status of a document key:

1. Select the document key.
2. Select or clear the check box in the **Active** column for the document key.
3. To save your changes, from the **File** menu, click **Save**.

4.4.4 Updating the active months of a document key

To update the active months of a document key:

1. From the **View** menu, select **View Months**.
2. Select the document key.
3. Select or clear the check boxes in the *month* columns for the document key.
4. To save your changes, from the **File** menu, click **Save**.

4.4.5 Updating the active days of a document key

To update the active days of a document key:

1. From the **View** menu, select **View Days**.
2. Select the document key.
3. Select or clear the check boxes in the *day* columns for the document key.
4. To save your changes, from the **File** menu, click **Save**.

4.4.6 Updating the active hours of a document key

To update the active hours of a document key:

1. Select the document key.
2. From the **Edit** menu, click **Set Active Hours**.
↔ The system displays the Set Active Hours wizard
3. Click **Next**.
4. Update the active hours of the day and then click **Next**.
5. To save your changes, click **Finish**.

4.4.7 Updating the session duration of a document key

To update the session duration of a document key:

1. Select the document key.
2. From the **Edit** menu, click **Set Session Duration**.
↔ The system displays the Set Session Duration wizard
3. Click **Next**.
4. Update the session duration and then click **Next**.
5. To save your changes, click **Finish**.

4.4.8 Updating the expiration date of a document key

To update the expiration date of a document key:

1. Select the document key.
2. From the **Edit** menu, click **Set Expiration Date**.
↔ The system displays the Set Expiration Date wizard
3. Click **Next**.
4. Update the expiration date and then click **Next**.
5. To save your changes, click **Finish**.

4.4.9 Updating the passcode of a document key

To update the passcode of a document key:

1. Select the document key.
2. From the **Edit** menu, click **Set Passcode**.
↔ The system displays the Set Passcode wizard
3. Click **Next**.
4. Update the passcode and then click **Next**.
5. To save your changes, click **Finish**.

4.5 Deleting document keys

To delete a document key:

1. Select the document key.
2. From the **Edit** menu, click **Delete**.
↔ The system displays the Delete Document Key confirmation
3. To delete the document key, click **OK**.

Note: You cannot undo this operation.

Chapter 5

Folders

Folders can be used to create a hierarchical organization for your documents.

5.1 Creating folders

To create a folder:

1. From the **File** menu in a Document Browser window, click **New** and then click **Folder**.
↔ The system displays the Create Folder dialog
2. In the **Folder name** field, enter a name for the folder.
3. In the **Folder description** field, enter a description for the folder.
4. To create the new folder, click **OK**.

5.2 Renaming folders

To rename a folder:

1. In a Document Browser window, select the folder.
2. From the **Edit** menu in a Document Browser window, click **Rename**.
↔ The system displays the Rename Folder dialog
3. In the **New folder name** field, enter a new name for the folder.
4. To rename the folder, click **OK**.

5.3 Deleting folders

To delete a folder:

1. In a Document Browser window, select the folder.
2. From the **Edit** menu in a Document Browser window, click **Delete**.
↔ The system displays the Delete Folder confirmation
3. To delete the folder, click **OK** in the Delete Folder confirmation dialog.

5.4 Searching folders

To search for documents in a folder:

1. In a Document Browser window, open the folder.
2. In the left pane, select the folder.
3. From the **Edit** menu, click **Search**.
↔ The system displays the Search for documents in *folder name* dialog
4. To match *all* of the search criteria, click **All of the following**; to match *any* of the search criteria, click **Any of the following**.
5. To search all of the subfolders, click the **Search subfolders** check box.¹
6. Add your search criteria.
7. To search for documents, click **Search**.
8. To open a found document, select the document and then click **Open**.

¹The entire folder hierarchy, starting with the folder, will be recursively searched.

Chapter 6

Sharing Folders

6.1 Folder keys

The purpose of a folder key is to allow users to share their folders with other users in a secure manner.

A folder key is associated with the following:

- A folder
- A folder key holder
- A set of permissions
- A set of attributes
- A status which is either *active* or *inactive*

The owner of a folder creates a folder key for the folder in order to share the contents of the folder with another user: the *folder key holder*. At any given point in time, the status of a folder key is either *active* or *inactive*.

If a folder key is active, the folder can be opened by the folder key holder. If the folder key holder opens the folder, the folder key holder will be able to view any documents for which the folder key holder has a document key and any subfolders for which the folder key holder has a folder key.¹

¹This assumes the folder keys and document keys have their *view* permissions enabled.

If a folder key is active, the folder can be searched by the folder key holder. If the folder key holder searches the folder, the folder key holder will be able to view matching documents for which the folder key holder has a document key and, when searching subfolders, the matching documents in any subfolders for which the folder key holder has a folder key.²

6.1.1 Folder key permissions

The permissions associated with a folder key determine what the folder key holder is allowed to do with the contents of the folder associated with the folder key.

Folder keys grant (or deny) the following permissions in regard to the contents of the folder associated with a folder key:

Permission	Group
Allow the contents of the folder to be <i>viewed</i>	lossless
Allow the contents of the folder to be <i>searched</i>	lossless

Table 6.1: Folder key permissions

The various folder key permissions are described in detail below.

Allow the contents of the folder to be *viewed*. If this permission is enabled, the folder key holder can view the contents of the folder.³

Allow the contents of the folder to be *searched*. If this permission is enabled, the folder key holder will be allowed to search the contents of the folder for documents⁴ using full-text search capabilities.

6.1.2 Folder key attributes

The attributes of a folder key determine when and how a folder key can be accessed by the folder key holder. A folder key can have the following attributes:

²This assumes the folder keys and document keys have their *search* permissions enabled.

³The folder key holder can only view documents for which the folder key holder has a corresponding document key (and the view permission of the document key must be enabled). The folder key holder can only view subfolders for which the folder key holder has a corresponding folder key (and the view permission of the folder key must be enabled).

⁴The folder key holder can only search documents for which the folder key holder has a corresponding document key (and the search permission of the document key must be enabled).

Active status	optional
Active months of the year	optional
Active days of the week	optional
Active hours of the day	optional
Session duration	optional
Expiration date	mandatory
Passcode	optional

Table 6.2: Folder key attributes

Of these attributes, only the folder key expiration date is mandatory.

The folder key attributes are described below.

Active status. This attribute allows the owner of the folder to specify the active status of the folder key. This attribute overrides any other attribute that affects the status of the folder key.

Active months of the year. This attribute allows the owner of the folder to specify the months of the year during which the folder key is active.

Active days of the week. This attribute allows the owner of the folder to specify the days of the week on which the folder key is active.

Active hours of the day. This attribute allows the owner of the folder to specify the hours of the day during which the folder key is active.

Session duration. This attribute allows the owner of the folder to specify a session duration for the folder key. A session duration is specified in minutes or seconds and controls the amount of time the folder can be displayed after it has been opened by the folder key holder. Once the session duration expires, the folder will be *automatically* closed.

Expiration date. Every folder key *must* have an expiration date. After the expiration date of a folder key has been reached, the folder key will become inactive.⁵

Passcode. The owner of a folder can associate a passcode with a folder key. If this is done, the folder key holder will need to enter the passcode before he or she can open the folder that is associated with the folder key.

⁵However, the owner of the folder can reset the expiration date of a folder key to a later date at any time.

6.2 Viewing folder keys created for you

This section will discuss how you can view folder keys created *for you* by others.

The My Folder Keyring window allows you to view the permissions and attributes associated with the folder keys created for you by others.

To view the folder keys created for you by others:

1. Set the focus to the Console window.
2. From the **File** menu, click **New** and then click **My Folder Keyring**.
↪ The system displays the My Folder Keyring window
3. From the **View** menu, click **View Months** to view the months during which the folder keys are active.
4. From the **View** menu, click **View Days** to view the days of the week on which the folder keys are active.
5. From the **View** menu, click **View Permissions** to view the permissions of the folder keys.

If a folder key has *restricted hours*, you will see the restricted hours in the **HOURS** column and the associated time zone in the **Region** column.

Click on the column headers to sort the folder keys by any of the following:

- Folder name
- Folder owner
- Folder key creation date
- Folder key expiration date

From the **File** menu, click **Open Folder** to open the folder associated with the currently selected folder key.

6.3 Creating folder keys for others

This section will discuss how you can create folder keys *for others*.

Creating a folder key for a folder involves the following steps:

1. Opening the folder keyring of the folder.
2. Starting the Create Folder Key wizard.
3. Selecting the permissions associated with the folder key.⁶
4. Enabling or disabling the active status of the folder key.⁷
5. Selecting the months of the year during which the folder key will be active.⁸
6. Selecting the days of the week on which the folder key will be active.⁹
7. Selecting the hours of the day during which the folder key will be active.¹⁰
8. Selecting the session duration that will be associated with the folder key.¹¹
9. Selecting the expiration date that will be associated with the folder key.¹²
10. Selecting a passcode for the folder key.¹³
11. Selecting the users for whom a copy of the folder key will be created.
12. Confirming your choices and selections.

Most of these steps are optional and have reasonable default values.

The following sections describe each of these steps.

6.3.1 Opening a folder keyring

In order to create a folder key for a folder, you must first open the folder keyring associated with the folder.

To open the folder keyring associated with a folder:

1. In a Document Browser window, select the folder.

⁶By default, the folder key will have the *view* and *search* permissions.

⁷By default, the folder key will have an *active* status.

⁸By default, the folder key will be active on *every month of the year*.

⁹By default, the folder key will be active on *every day of the week*.

¹⁰By default, the folder key will be active during *every hour of the day*.

¹¹By default, viewing the folder will *not* be limited to a session duration.

¹²By default, the expiration date will be *one year from the current date*; however, you can select any date after the *current* date.

¹³By default, the folder key will have *no* passcode.

2. From the **Edit** menu, click **Open Keyring**.

↪ The system displays the Folder Keyring window

6.3.2 Starting the Create Folder Key wizard

To start the Create Folder Key wizard:

1. From the **File** menu in the Folder Keyring window, click **New**.

↪ The system displays the Create Folder Key wizard

2. To proceed to the next step, click **Next**.

6.3.3 Folder key permissions

This page of the Create Folder Key wizard allows you to select the permissions that will be granted by the folder key.

These permissions allow the contents of the folder to be *viewed* or *searched*.

To proceed to the next step, click **Next**.

6.3.4 Folder key active status

This page of the Create Folder Key wizard allows you to select the *status* of the folder key.

A folder key can be *active* or *inactive*; however, only an active folder key can be used to grant access to a folder.

To create an active folder key, select **Enable active status**. (If you want to create a folder key that is initially inactive, clear **Enable active status**.)

To proceed to the next step, click **Next**.

6.3.5 Folder key active months

This page of the Create Folder Key wizard allows you to select the months of the year during which the folder key will be active.

To proceed to the next step, click **Next**.

6.3.6 Folder key active days

This page of the Create Folder Key wizard allows you to select the days of the week on which the folder key will be active.

To proceed to the next step, click **Next**.

6.3.7 Folder key active hours

This page of the Create Folder Key wizard allows you to select the hours of the day during which the folder key will be active.

To proceed to the next step, click **Next**.

6.3.8 Folder key session duration

This page of the Create Folder Key wizard allows you to specify a session duration for the folder key.

A session duration determines the amount of time the folder may be viewed during one session (a session begins immediately after the folder has been opened).

After the session duration has elapsed, the folder will be *automatically* closed.

To proceed to the next step, click **Next**.

6.3.9 Folder key expiration date

This page of the Create Folder Key wizard allows you to select an expiration date for the folder key.

After the expiration date of a folder key has been reached, the folder key becomes inactive.

To proceed to the next step, click **Next**.

6.3.10 Folder key passcode

This page of the Create Folder Key wizard allows you to specify a passcode for the folder key.¹⁴

¹⁴As mentioned previously, passcodes provide a defense against covert key logging (and key loggers) since passcodes are not entered via a keyboard.

If you specify a passcode for a folder key, the folder key holder will need to enter the passcode before the folder associated with the folder key can be accessed.

To proceed to the next step, click **Next**.

6.3.11 Folder key users

This page of the Create Folder Key wizard allows you to select the users for whom a copy of the folder key will be created.

To proceed to the next step, click **Next**.

6.3.12 Folder key confirmation

This page of the Create Folder Key wizard allows you to confirm your selections.

To create the folder key (or folder keys), click **Finish**.

After the folder keys have been created, they will be displayed in the Folder Keyring window.

6.4 Updating folder keys

You can update the permissions and attributes of folder keys at any time.

Specifically, you can update any of the following:

- The permissions of a folder key
- The active status of a folder key
- The active months associated with a folder key
- The active days associated with a folder key
- The active hours associated with a folder key
- The session duration associated with a folder key
- The expiration date associated with a folder key
- The passcode associated with a folder key

6.4.1 Updating the permissions of a folder key

To update the permissions associated with a folder key:

1. Select and expand the folder key.
2. Expand **Permissions**.
3. Select or clear the check boxes of the permissions you want to update.
4. To save your changes, from the **File** menu, click **Save**.

6.4.2 Updating the active status of a folder key

To update the active status of a folder key:

1. Select the folder key.
2. Select or clear the check box in the **Active** column of the folder key.
3. To save your changes, from the **File** menu, click **Save**.

6.4.3 Updating the active months of a folder key

To update the active months of a folder key:

1. From the **View** menu, select **View Months**.
2. Select the folder key.
3. Select or clear the check boxes in the *month* columns of the folder key.
4. To save your changes, from the **File** menu, click **Save**.

6.4.4 Updating the active days of a folder key

To update the active days of a folder key:

1. From the **View** menu, select **View Days**.
2. Select the folder key.
3. Select or clear the check boxes in the *day* columns of the folder key.
4. To save your changes, from the **File** menu, click **Save**.

6.4.5 Updating the active hours of a folder key

To update the active hours of a folder key:

1. Select the folder key.
2. From the **Edit** menu, click **Set Active Hours**.
↔ The system displays the Set Active Hours wizard
3. Click **Next**.
4. Update the active hours of the day and then click **Next**.
5. To save your changes, click **Finish**.

6.4.6 Updating the session duration of a folder key

To update the session duration of a folder key:

1. Select the folder key.
2. From the **Edit** menu, click **Set Session Duration**.
↔ The system displays the Set Session Duration wizard
3. Click **Next**.
4. Update the session duration and then click **Next**.
5. To save your changes, click **Finish**.

6.4.7 Updating the expiration date of a folder key

To update the expiration date of a folder key:

1. Select the folder key.
2. From the **Edit** menu, click **Set Expiration Date**.
↔ The system displays the Set Expiration Date wizard
3. Click **Next**.
4. Update the expiration date and then click **Next**.
5. To save your changes, click **Finish**.

6.4.8 Updating the passcode of a folder key

To update the passcode of a folder key:

1. Select the folder key.
2. From the **Edit** menu, click **Set Passcode**.
↔ The system displays the Set Passcode wizard
3. Click **Next**.
4. Update the passcode and then click **Next**.
5. To save your changes, click **Finish**.

6.5 Deleting folder keys

To delete a folder key:

1. Select the folder key.
2. From the **Edit** menu, click **Delete**.
↔ The system displays the Delete Folder Key confirmation
3. To delete the folder key, click **OK**.

Note: You cannot undo this operation.

Chapter 7

Messages

Confinet lets you create messages that can display formatted text, tables, bullet lists, pictures, and more.

7.1 Message permissions

Every message has a set of message permissions associated with it.

Message permissions allow you to control what the recipients of a message are allowed to do with the contents of a message and how they can respond to a message.

As in the case of document key permissions, message permissions are divided into two groups: *lossy* and *lossless*. In this context, the terms *lossy* and *lossless* refer to the potential disclosure of information to unauthorized parties.

If you enable *lossy* permissions for a message, you explicitly give the recipients of a message a means by which they can easily convey the contents of the message to others without your authorization.¹

By contrast, enabling *lossless* permissions does not give the recipients of a message an *explicit* means by which they can easily convey information to unauthorized parties.

Furthermore, there are two types of message permissions: message *content* permissions and message *user* permissions; both of these types of permissions are described in the following sections.

¹Selecting the **Message read-only** check box when creating a message will disable *all* *lossy* permissions by default.

7.1.1 Message content permissions

Message content permissions determine what the recipients of a message are allowed to do with the contents of a message.

The following message content permissions can be enabled or disabled:

Permission	Group
Allow the contents of the message to be <i>viewed</i>	lossless
Allow the contents of the message to be <i>copied to the clipboard</i>	lossy
Allow the contents of the message to be <i>exported to a text file</i>	lossy
Allow the contents of the message to be <i>exported to a PDF file</i>	lossy
Allow the contents of the message to be <i>printed</i>	lossy
Allow the contents of the message to be <i>searched</i>	lossless

Table 7.1: Message content permissions

Message content permissions are described in detail below.

Allow the contents of the message to be *viewed*. If this permission is enabled, the recipients of the message can view its contents. Note: Unless this permission is enabled, any other permission will be irrelevant and ignored.

Allow the contents of the message to be *copied to the clipboard*. If this lossy permission is enabled, the recipients of the message will be allowed to copy the contents of the message to the clipboard. **CAUTION: The creator of a message should take care when enabling this permission, since it could allow message recipients to use the clipboard to copy the contents of the message to a file or third-party application (for example, an email client) for distribution to others without authorization.**

Allow the contents of the message to be *exported to a text file*. If this lossy permission is enabled, message recipients will be allowed to export the contents of the message to a text file. **CAUTION: The creator of a message should take care when enabling this permission, since it could allow message recipients to export the contents of the message to a text file for distribution to others without authorization.**

Allow the contents of the message to be *exported to a PDF file*. If this lossy permission is enabled, message recipients will be allowed to export the contents of the message to a PDF file. **CAUTION: The creator of a message should take care when enabling this permission, since it could allow message recipients to export the contents of the message to a PDF file for**

distribution to others without authorization.

Allow the contents of the message to be *printed*. If this lossy permission is enabled, message recipients will be allowed to print the contents of the message. **CAUTION: The creator of a message should take care when enabling this permission, since it could allow message recipients to print the contents of the message and then distribute the printed material to others without authorization.**

Allow the contents of the message to be *searched*. If this permission is enabled, message recipients will be allowed to search the contents of the message using full-text search capabilities.

7.1.2 Message user permissions

Message user permissions determine how message recipients are allowed to reply to a message.

The following message user permissions can be enabled or disabled:

Permission	Group
Allow Reply	lossless
Allow Reply to All	lossless
Allow Forward	lossy

Table 7.2: Message user permissions

Message user permissions are described as follows.

Allow **Reply**. If this permission is enabled, the recipients of the message will be allowed to reply *directly* to the sender of the message.

Allow **Reply to All**. If this permission is enabled, the recipients of the message will be allowed to reply *directly* to all of the recipients of the message.

Allow **Forward**. If this lossy permission is enabled, the recipients of the message will be allowed to forward the message to other users who were *not* the original recipients of the message.

7.2 Creating messages

You can create a message in a Message Browser window.

To create a new message:

1. From the **File** menu, click **New** and then click **Message**.
↔ The system displays the Create Message dialog
2. In the **Message subject** field, type the subject of the message.
3. In the **Message Content Permissions** tab, select or clear message content permissions.
4. In the **Message User Permissions** tab, select or clear message user permissions.
5. To create the message, click **OK**.

After you create a new message, you will be given the opportunity to add message content, recipients, and document attachments.

7.2.1 Message content

The Message Editor window has all of the features of the Document Editor window and is similar in terms of functionality.

See the section [Editing documents](#) for information on general editing tasks when composing the contents of a message.

See the section [Document spelling](#) for information on spell checking the contents of a message.²

7.2.2 Message recipients

To select the *direct* recipients of a message, click **To**.

To select the *copied* recipients of a message, click **Cc**.

To select the *blind-copied* recipients of a message, click **Bcc**.

7.2.3 Message attachments

When you create a message, you can attach any of your documents to the message.

²You can add words to your personal dictionary when spell-checking messages, just as you can when spell-checking documents.

To attach a document to a message, click **Add Document**.

To remove a document attachment, click **Remove Document**.

To verify that your message recipients have document keys for the attached documents, click **Verify Documents**.

The recipients of your message must have document keys in order to access the attached documents. However, if a message recipient does not have a document key for an attached document, you will be automatically prompted to create a document key that can be used for any users that lack one.

7.3 Viewing and replying to messages

7.3.1 Viewing a message

In a Message Reader window, you can view messages created *for you* by other users.

To view a message created for you:

1. In a Message Browser window, select the message.
2. Double-click the message.

↔ The system displays the Message Reader window

7.3.2 Replying to a message

Depending upon the permissions given the recipients of a message by the creator of the message, you may be able to reply to a message.

Conditional: To reply to the sender of a message, click **Reply**.³

Conditional: To reply to all the recipients of a message, click **Reply to All**.⁴

Conditional: To forward a message to others, click **Forward**.⁵

³This assumes the creator of the message has enabled Allow **Reply**.

⁴This assumes the creator of the message has enabled Allow **Reply to All**.

⁵This assumes the creator of the message has enabled Allow **Forward**.

7.3.3 Filtering a message thread by permissions

A message may be a reply to another message, which may itself be a reply to yet another message, and so forth, going back to the *initial* message. This list of messages, sorted in reverse chronological order, is a *message thread*.

Each message in a message thread has its *own* set of permissions. When viewing a message thread in a Message Reader window or a Message Editor window, the permissions of *each* message in a message thread must be respected.⁶

This could result in conflicts; for example, suppose you want to perform one of the following operations:

- Copy the contents of a message thread to the clipboard
- Export the contents of a message thread to a text file
- Export the contents of a message thread to a PDF file
- Print the contents of a message thread

For each of these operations, a message in the message thread may have a permission setting that causes a conflict.

For example, suppose you want to print the contents of a message thread; however, a particular message in the message thread has a disabled *print* permission. How should this conflict be resolved?

Confinet resolves this conflict by allowing you to filter the messages in a message thread by their permission settings.

For example, to print the contents of a message thread, select **Display messages that can be Printed**. This filters out any messages in the message thread that cannot be printed due to their *print* permission settings.

The following table displays permission-dependent operations and the filters that must be selected to enable these operations:

⁶The *view* permission of a message is *implicitly* respected; if it is disabled, the message will no longer be viewable by itself, or as a part of any message thread containing it.

Operation	Permission Filter
Copy the message to the clipboard	Copied to the Clipboard
Export the message to a text file	Exported to a Text File
Export the message to a PDF file	Exported to a PDF File
Print the message	Printed

Table 7.3: Permission-dependent operations and filters

To perform an operation in the left column, select the matching filter in the right column. These filters can be selected at the bottom of a Message Reader window (or a Message Editor window).

From this point on, for the sake of simplicity, we may use the terms message and message thread interchangeably.⁷

7.4 Editing messages

In a Message Editor window, you can edit and update messages created *by you* for other users. You may edit or update any of the following at any time, *even after you have sent the message*:

- message permissions
- message text
- message subject
- message recipients
- message attachments

Your updates will be seen the next time the recipients view the message.⁸

To edit a message created by you:

1. In a Message Browser window, select the message.
2. From the **Edit** menu, click **Edit Message**.

↔ The system displays the Message Editor window

⁷However, from a technical point of view, we define a message thread as a *list* of one or more messages that can be uniquely identified, sorted in reverse chronological order.

⁸The recipients will know the message text has been edited because the *modification date* will be shown in a bold font (until the recipient reads the updated message).

7.4.1 Editing message content

You can update the contents of a message you have created, even after you have already sent the message.⁹

After you update the contents of a message, the new contents will be displayed the next time the message is opened by one of the recipients of the message, even if the message is part of a message thread.

7.4.2 Editing message recipients

You can update the recipients of a message you have created, even after you have sent the message.

If you remove a recipient, the next time the recipient opens a Message Browser window, the message *will not* be displayed in the new Message Browser window.

By contrast, if you add a recipient, the next time the recipient opens a Message Browser window, the message *will* be displayed in the new Message Browser window.

7.4.3 Editing message permissions

You can update the permissions of a message you have created, even after you have sent the message.

After you update the permissions of a message, the new permissions will be applied the next time the message is opened by one of the recipients of the message.

7.4.4 Editing message attachments

You can update the document attachments of a message you have created, even after you have sent the message.

If you remove a document attachment, the next time a recipient views the message in a Message Reader window, the document attachment will *not* be displayed.

By contrast, if you add a document attachment to a message, the next time a recipient opens the message in a Message Reader window, the document attachment *will* be displayed.

⁹However, since Confinet keeps every version of a message, you cannot repudiate previous versions of a message you have sent to others.

7.5 Deleting messages

To delete a message:

1. In a Message Browser window, select the message.
2. From the **Edit** menu, click **Delete Message**.
↔ The system displays the Delete Message confirmation
3. To delete the message, click **OK**.

Note: You cannot undo this operation.

7.5.1 Referenced messages

If a message you have created is currently being referenced by another message, you will not be able to delete it because *it is still in use*.¹⁰

However, you can control the visibility of a message by enabling or disabling its *view* permission, regardless of whether the message is being referenced by other messages.

7.6 Searching messages

In a Message Browser window, you can search for messages using full-text search and several types of criteria.

If you want to search all of your messages, select **Messages** at the top of the message folder pane before you perform a search.

If you only want to search for messages in a particular message folder, select the message folder before you perform a search.

To search for messages:

1. From the **Edit** menu, click **Search Messages**.
↔ The system displays the Search for Messages dialog

¹⁰For example, the message may be referenced by a message you have created, or by a message created by another user in a message thread.

2. To match *all* of the search criteria, click **All of the following**; to match *any* of the search criteria, click **Any of the following**.
3. Add your search criteria.
4. To search for messages, click **Search**.
5. To open a found message, select the message and then click **Open**.

7.7 Message folders

In a Message Browser window, you can organize your messages in message folders.

7.7.1 Creating, renaming, and deleting message folders

To create a message folder:

1. From the **File** menu, click **New** and then click **Message Folder**.
↔ The system displays the New Message Folder dialog
2. In the **Message folder name** field, enter a name for the message folder.
3. To create the new message folder, click **OK**.

To rename a message folder:

1. Select the message folder you want to rename.
2. From the **Edit** menu, click **Edit Message Folder**.
↔ The system displays the Edit Message Folder dialog
3. Enter the new message folder name.
4. To rename the message folder, click **OK**.

To delete a message folder:

1. Select the message folder you want to delete.
2. From the **Edit** menu, click **Delete Message Folder**.
↔ The system displays the Delete Message Folder confirmation
3. To delete the message folder, click **OK**.

Note: You cannot delete a message folder unless it is empty.

Chapter 8

Home Groups and Personal Groups

A group is a collection of users with Confinet accounts.

8.1 Home Groups

A user must have a group key in order to have direct access to the users in a group. The Confinet Administrator creates group keys for a user.

A user's Home Groups are *all* of the groups for which the user has a group key.

8.2 Personal Groups

From a My Groups window, a user can create *personal groups* of users in order to make the distribution of documents and messages to other users more convenient.

8.2.1 Creating a personal group

You can create a personal group in a My Groups window.

To create a new personal group:

1. From the **File** menu, click **New** and then click **User Group**.
↔ The system displays the Create Group dialog
2. In the **Group name** field, enter a name for the new group.
3. In the **Group description** field, enter a description for the group.

4. To create the new group, click **OK**.

8.2.2 Adding a user to a personal group

To add users to a personal group:

1. In a My Groups window, select the group to which you want to add users.
2. From the **File** menu, click **New** and then click **User**.
↔ The system displays the Select Users dialog
3. In the Select Users dialog, select user candidates from either **Home Groups** or **My Groups**.¹
4. From your candidate user selections, select the users that you want to add to the group.
5. To add the selected users, click **OK**.

8.2.3 Removing a user from a personal group

To remove a user from a personal group:

1. In a My Groups window, select the user you want to remove.
2. From the **Edit** menu, click **Remove User**.
↔ The system displays the Remove User confirmation
3. To remove the selected user, click **OK**.

8.2.4 Deleting a personal group

To delete a personal group:

1. In a My Groups window, select the personal group you want to delete.
2. From the **Edit** menu, click **Delete User Group**.
↔ The system displays the Delete User Group confirmation
3. To delete the selected personal group, click **OK**.

¹This candidate-selection model allows you to conveniently select *candidate* users from multiple user groups from which you can make your *actual* user selections.

Chapter 9

Picture Directories

This chapter will discuss the display of pictures and images in your Confinet documents and messages.

When you embed a picture in a document or a message, you are essentially embedding the *name* of a file containing the image in the document or message.

The pathname of the directory containing the image file is *not* embedded with the name of the image file. Instead, the pathname of the directory containing the image file is *automatically* added to a list of directory path names that the Confinet Client searches for image files.

This can include *network shares*. In fact, if you want to share Confinet documents with pictures in them, one of the best ways to do this is to include pictures from network shares that are available to the Confinet users that you want to share your Confinet documents with. However, these users must have access to the network shares and they may need to add them to their picture directories in order to view the pictures in your Confinet documents.

If you move your pictures to a new directory, make sure the new directory is listed as one of your picture directories. If it is not listed, you should add it.

One advantage of this way of sharing pictures and images in your Confinet documents is that when you update your pictures and images, the Confinet users you share them with will see the updates the next time they view a shared Confinet document containing them.

Another advantage is that you do not need to specify a directory for *each* picture. For example, you could consolidate pictures from several directories into a new directory and then add the new directory as a picture directory. Confinet will then find *all* of the pictures that you moved to the new directory.

9.1 Picture formats

Confinet documents and messages can display the following types of images:

Description	Format
Windows Bitmap	BMP
Graphics Interchange Format	GIF
Joint Photographic Experts Group	JPG
Portable Network Graphics	PNG

Table 9.1: Supported image formats

9.2 Picture references

To embed a reference to a picture inside of a document:

1. In a Document Editor window, from the **Insert** menu, click **Picture**.
↪ The system displays the Open File dialog
2. Select a picture file.
3. To insert a reference to the picture file into the document, click **Open**.

To embed a reference to a picture inside of a message:

1. In a Message Editor window, from the **Insert** menu, click **Picture**.
↪ The system displays the Open File dialog
2. Select a picture file.
3. To insert a reference to the picture file into the message, click **Open**.

9.3 Picture directories

To add a directory to the list of directories searched for image files:

1. In the Console window, from the **Edit** menu, click **Picture Directories**.
↪ The system displays the Picture Directories dialog

2. To add a directory, click **Add**.
↪ The system displays the Select Picture Directory dialog
3. Select the directory you want to add.
4. Click **Open** to add the directory.

To edit the name of a directory in the list of directories searched for image files:

1. In the Console window, from the **Edit** menu, click **Picture Directories**.
↪ The system displays the Picture Directories dialog
2. Select the directory.
3. Click **Edit**.
↪ The system displays the Edit Directory Name dialog
4. Edit the directory name.
5. To save your changes, click **OK**.

To remove a directory from the list of directories searched for image files:

1. In the Console window, from the **Edit** menu, click **Picture Directories**.
↪ The system displays the Picture Directories dialog
2. Select the directory.
3. Click **Remove** to remove the directory.

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