Confinet® Client Reference Guide

Release 1.1.0.a

October 7, 2026



ABSI

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Confinet® Client Reference Guide
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Part I

Getting Started

Chapter 1

Confinet

The purpose of this document is to explain why Confinet exists, how Confinet works and how you can use Confinet to create, manage, share, and protect confidential information.

1.1 Why Confinet?

1.1.1 Security

The theft of intellectual property (IP) and confidential information is significantly worse now than in the past, both in scale and sophistication. Today, this criminal activity threatens the existence of many organizations, both large and small.

The Confinet product suite has been explicitly designed to combat this threat by providing an *effective* approach to improving an organization's cyber-security posture in regard to the protection of confidential information.

1.1.2 Productivity

Although the main focus of Confinet is on strengthening an organization's security posture in regard to the protection of sensitive information, Confinet also increases an organization's productivity as a *consequence* of strengthening its security posture.

For example, one of the requirements of the Confinet product suite is to allow users to dynamically update the information they create with Confinet, and the permissions that protect that information, *at any time*.

One consequence of this requirement is that you can dynamically update the content and permissions of your Confinet messages at any time, *even after you have sent them.* You can even add and remove message recipients at any time.

In fact, Confinet will give you *many* new capabilities in regard to managing and protecting your information that would have been inconceivable before.

Did you make a mistake or a typo in a message? Just update and save the message; the next time the message is viewed, the recipients will see the corrected message. There is no need to send another message.

Did you accidentally send the message to the wrong user? Just remove the user from the recipients of the message. Did you forget to include a user? Just add the user to the recipients of the message.

These are just a few of the ways in which Confinet improves the productivity of users while strengthening their cyber-security posture at the same time.

1.2 What is Confinet?

Confinet is a software product suite that provides the members of an organization with everything they need in order to create, manage, protect, and share confidential information and intellectual property.

In addition, Confinet can be used to securely share information with individuals who are *external* to an organization, including the organization's partners, customers, consultants, vendors, distributors, attorneys, auditors, etc.

1.3 What does Confinet allow you to do?

Confinet allows you to create Confinet *documents* and *messages* that can be shared with others via the use of access controls that give you precise control over *who* information is shared with, *how* it is shared, and *when* it is shared.

1.4 Security-related objectives

Confinet has a number of security-related objectives, including the following:

1.4.1 Elimination of spam

By definition, *spam* consists of useless, unsolicited, and unwanted messages. Since time must be spent examining and then deleting spam, it is a drain on the productivity of any organization.

In addition, spam is commonly employed in *phishing attacks*, a form of cyber attack in which an email with a malicious link is sent to a victim. With the increasing use of AI by bad actors to generate malicious emails that appear to be genuine and legitimate, this problem will only get worse.

Confinet combats spam by providing an organization and its associates with a confidential network. Only individuals with a Confinet account are able to communicate with the members of an organization via Confinet. This is in contrast to traditional email, which allows *anyone* to inundate an organization with spam from *anywhere*.

1.4.2 Reduced exposure to malware

In addition to sabotage and ransomware, one of the main goals of malware is to facilitate the theft of personal, financial, or business information (including customer data) for nefarious purposes.

Email is one of the most common attack vectors used by cyber-criminals to infect a user's computer with malware. In fact, email-based phishing attacks are frequently cited as the most common attack vector for malware.

One report, the Barracuda 2025 Email Threats Report, stated directly that "Email remains the most common attack vector for cyber threats because it provides an easy entry point into corporate networks. One in four email messages today are either malicious or unwanted spam."
Confinet greatly reduces exposure to this form of attack because it does not rely on the use of traditional email to create, manage, and share confidential information. As a result, Confinet allows the members and affiliates of an organization to communicate with messages that will not expose them to the most common source of malware.

1.4.3 Comprehensive information security

If confidential information is handled by several applications, the security of the information will be no greater than that provided by the *least* secure application that handles the information.

Thus, if the least secure application that handles confidential information fails to protect it, this may render the security features of the other applications that handle the information a moot point.

Confinet is a *self-contained* product suite that does not require the use of *any* untrusted, third-party applications to create, manage, protect, and share confidential information and intellectual property. The result is consistent and comprehensive coverage for the protection of information, from its initial inception and creation to its dissemination to authorized users.

1.4.4 Protection of information on networks

The Confinet product suite encrypts all transmitted information with standard cryptographic protocols on both public and private networks. This *always-on* encryption provides your information with protection on any network over which it is transmitted.

Chapter 2

Installation

2.1 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.

2.1.1 Windows

The Confinet Client can be installed on the following versions of the Windows operating system:

- Windows 10 on x86_64
- Windows 11 on x86_64

2.1.2 macOS

The Confinet Client can be installed on the following versions of the macOS operating system:

- macOS Sonoma on Intel-based Macs
- macOS Sequoia on Intel-based Macs and Apple Silicon Macs
- macOS Tahoe on Intel-based Macs and Apple Silicon Macs
- macOS Golden Gate on Apple Silicon Macs

2.1.3 Linux

The Confinet Client can be installed on the following versions of the Linux operating system:

- Red Hat Enterprise Linux 10 on x86_64 and ARM64
- Oracle Linux 10 on x86_64 and ARM64
- AlmaLinux 10 on x86_64 and ARM64
- Ubuntu 24.04 on x86_64 and ARM64
- Ubuntu 26.04 on x86_64 and ARM64

We can build the Confinet product suite on *any* modern version of Linux, including *custom* versions of Linux. If you need support for a version of Linux that has not been listed, please contact us so that we can accommodate your needs.

2.2 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).

2.3 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.

2.3.1 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.

2.3.2 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.

2.3.3 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.

2.4 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.

2.5 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).

2.6 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]

2.7 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]

[1] Use the command **sudo apt install *./client.deb*** to install the DEB package from the command line.
[2] Use the command **sudo dnf install *./client.rpm*** to install the RPM package from the command line.

Chapter 3

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).

3.1 Confinet account creation notification

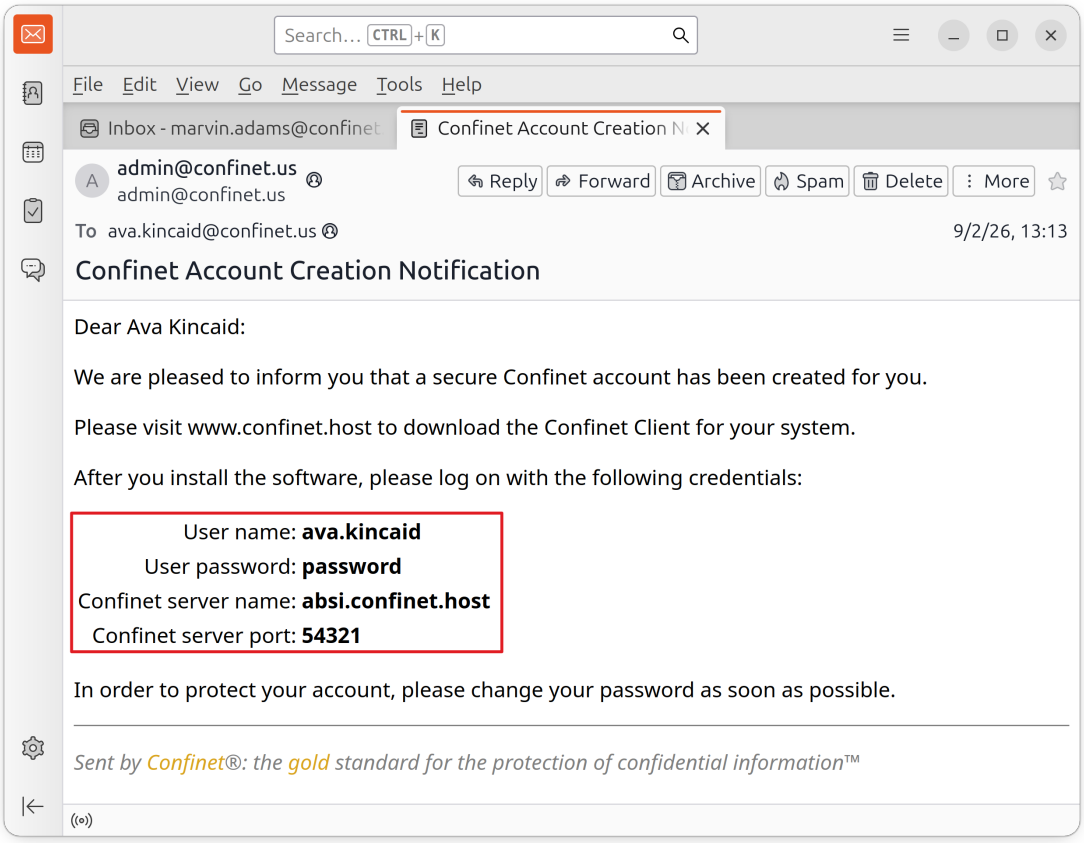


Figure 3.1: Confinet Account Creation Notification

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

This notification will resemble the one shown in Figure 3.1.

(See Figure 3.1)

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

- *User name*

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

Table 3.1 provides a short description of these settings and their usage.

Table 3.1: 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

[1]For your security, please change the password *immediately* after your first logon. See Section 3.5.

3.2 Network settings

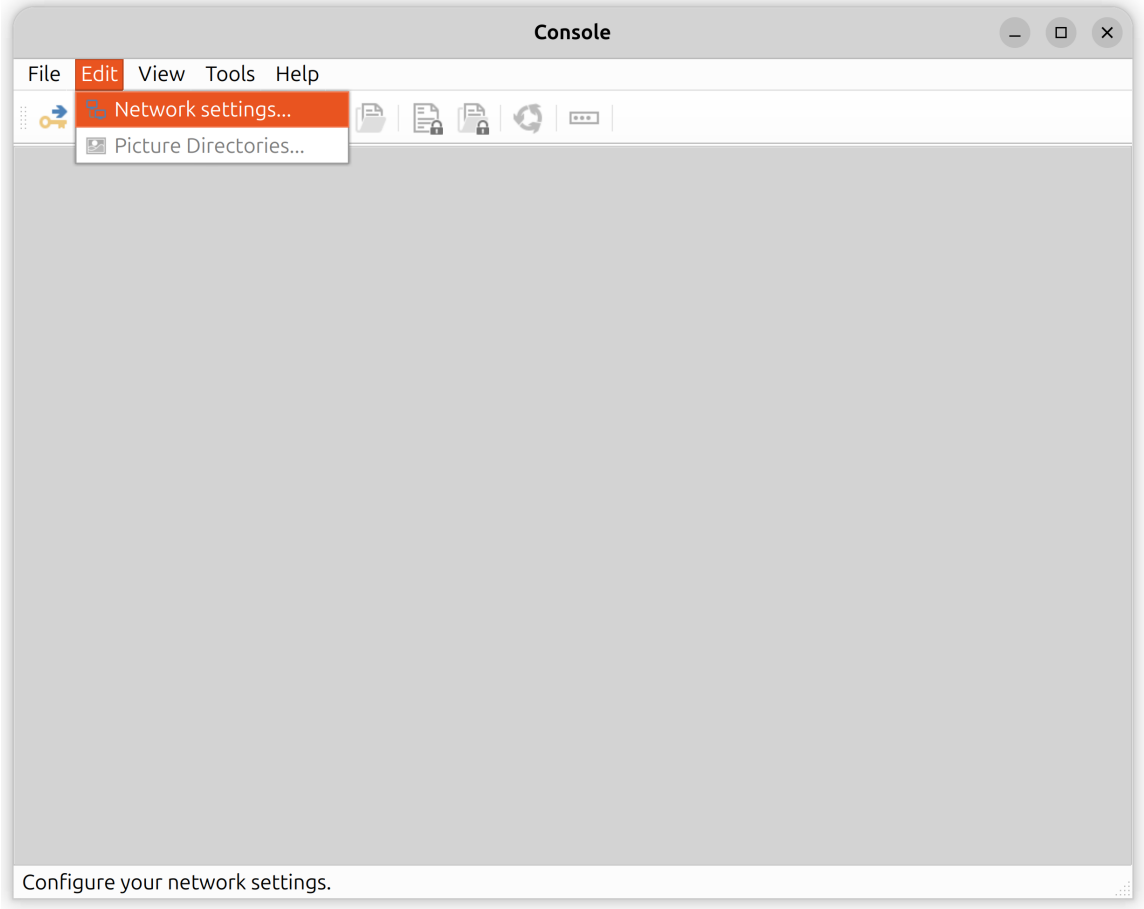


Figure 3.2: Console window Edit Network Settings

(See Figures 3.1, 3.2, 3.3)

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

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

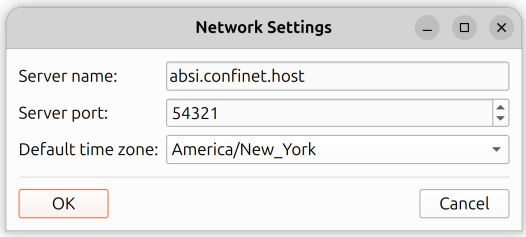


Figure 3.3: Network Settings dialog

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.

3.3 Log on to Confinet

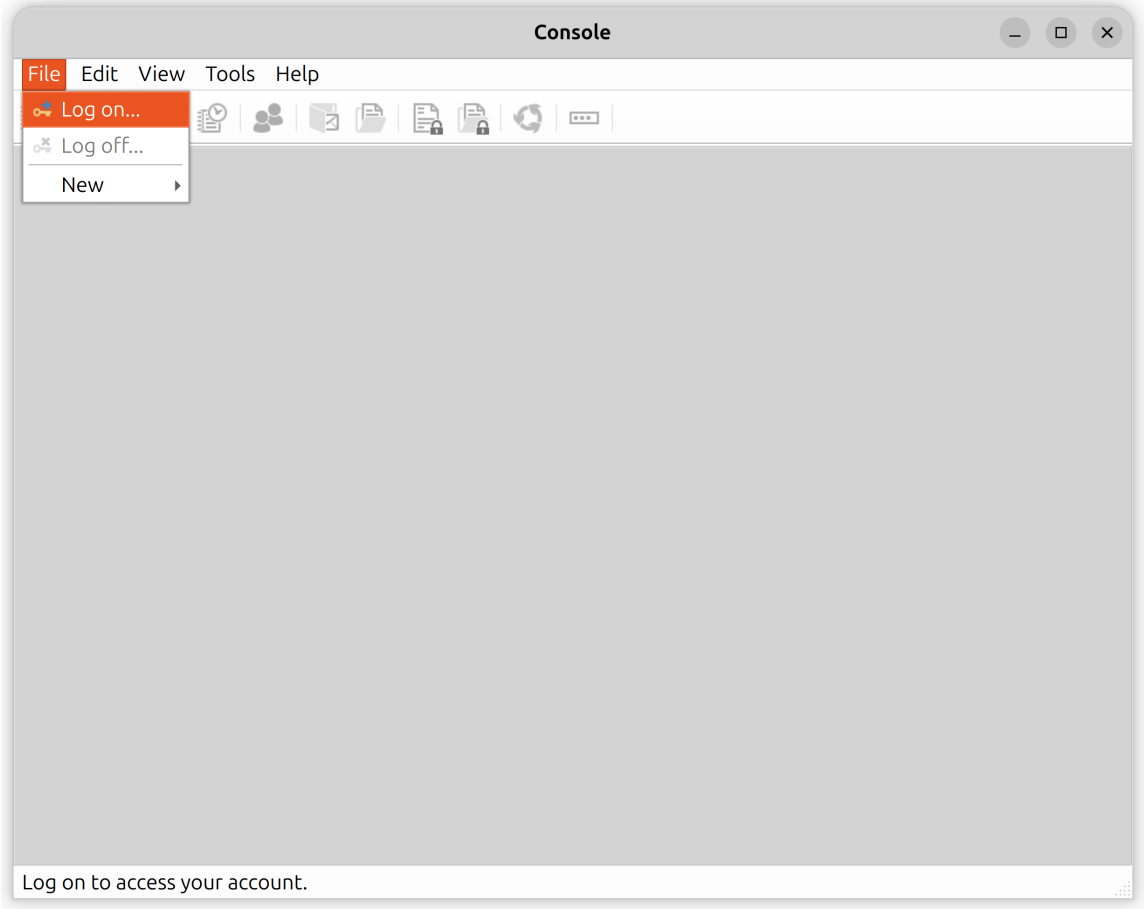


Figure 3.4: Console window File Log On

(See Figures 3.4, 3.5)

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.

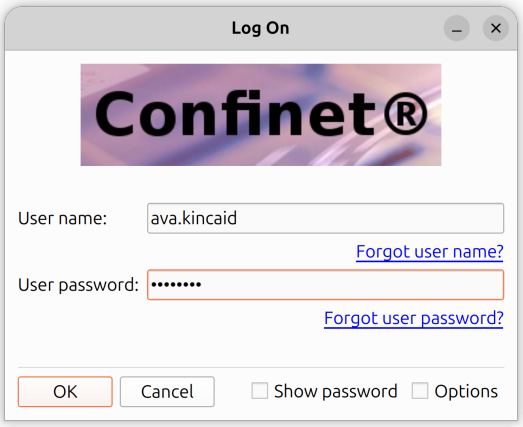


Figure 3.5: Log On dialog

4. Enter the User password you were given in your account creation notification.[3]
5. Click the **OK** button.

3.4 User options

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

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

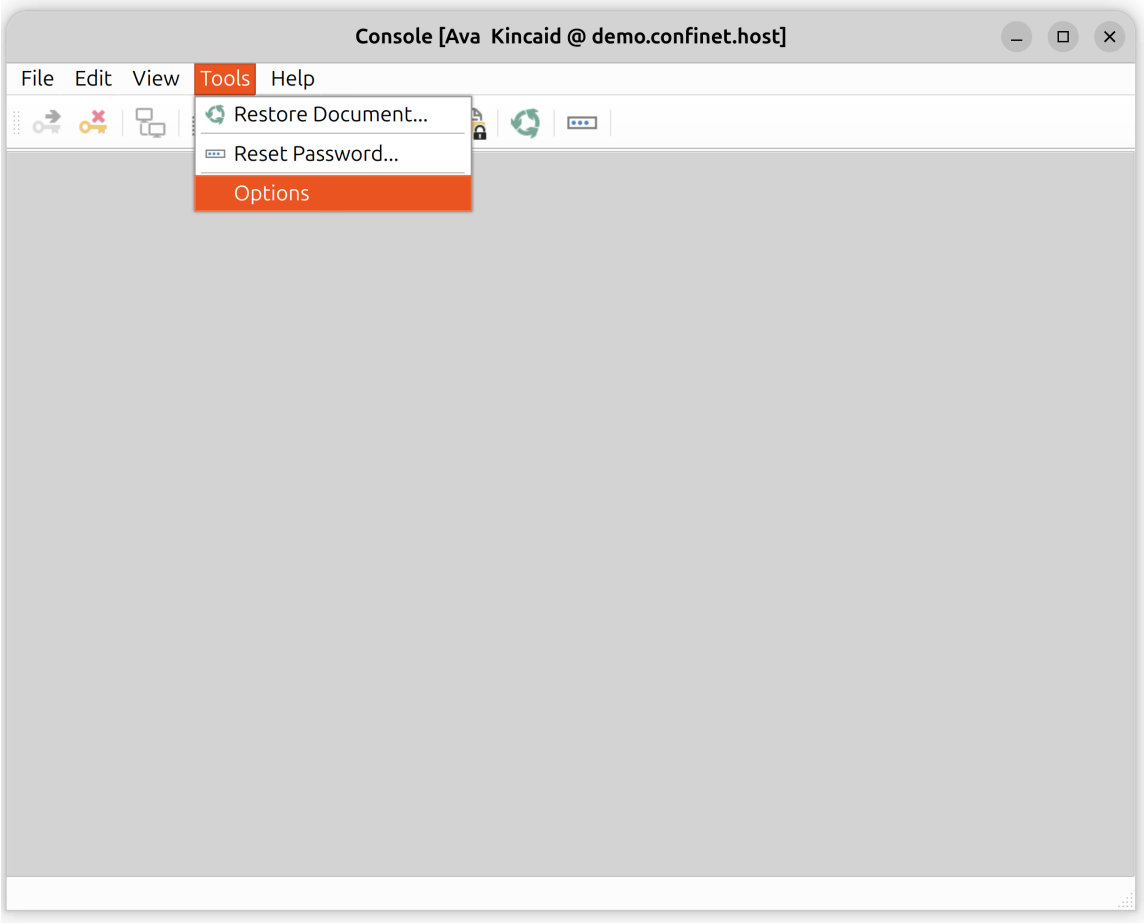


Figure 3.6: Console window Tools Options

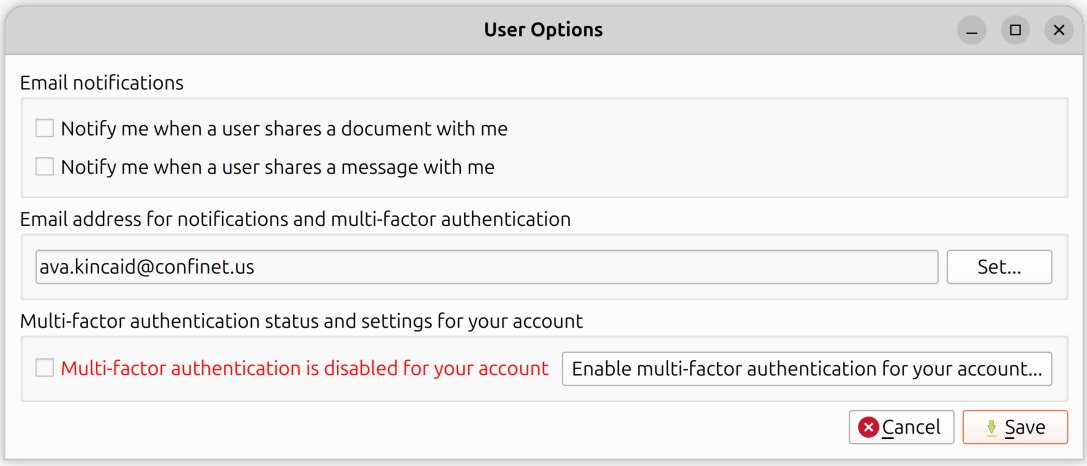


Figure 3.7: User Options dialog before configuration

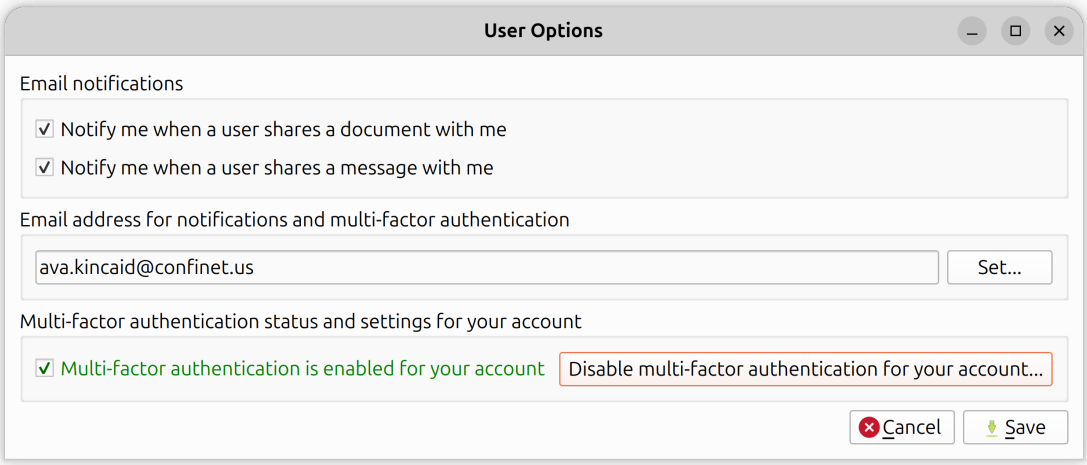


Figure 3.8: User Options dialog after configuration

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

3.4.1 Email notifications

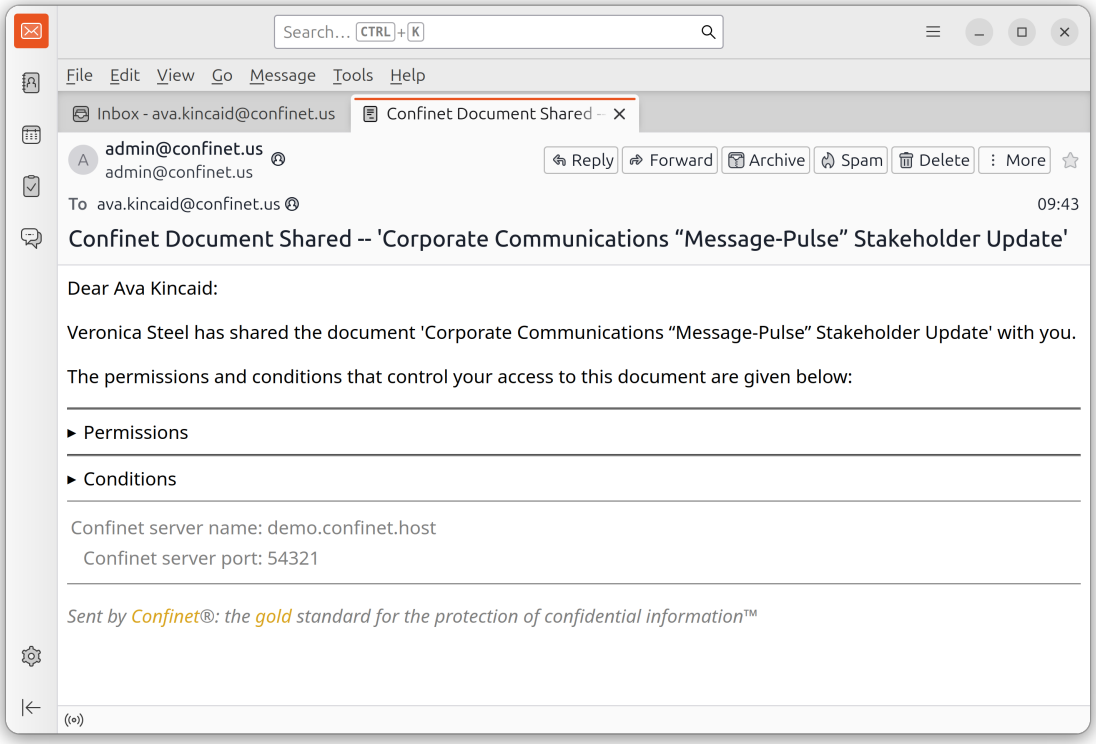


Figure 3.9: Confinet document shared email notification

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

See Figure 3.8 for an example.

After you enable this option, you will receive email notifications like the one in figure 3.9.

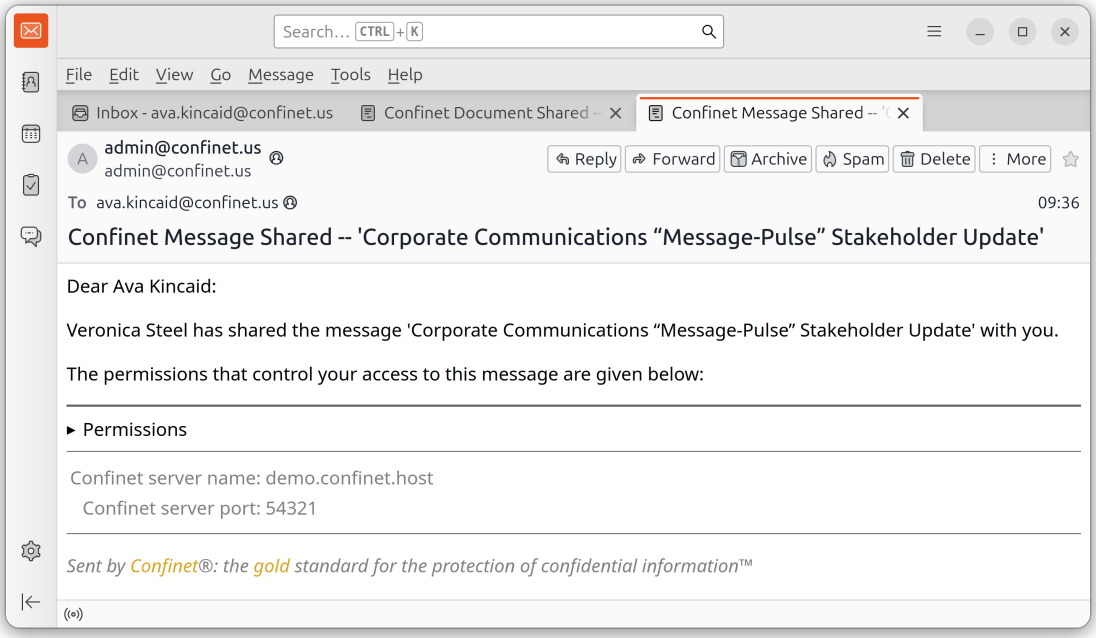


Figure 3.10: Confinet message shared email notification

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

See Figure 3.8 for an example.

After you enable this option, you will receive email notifications like the one in figure 3.10.

Click **Save** to save your settings.

3.4.2 Email address for notifications

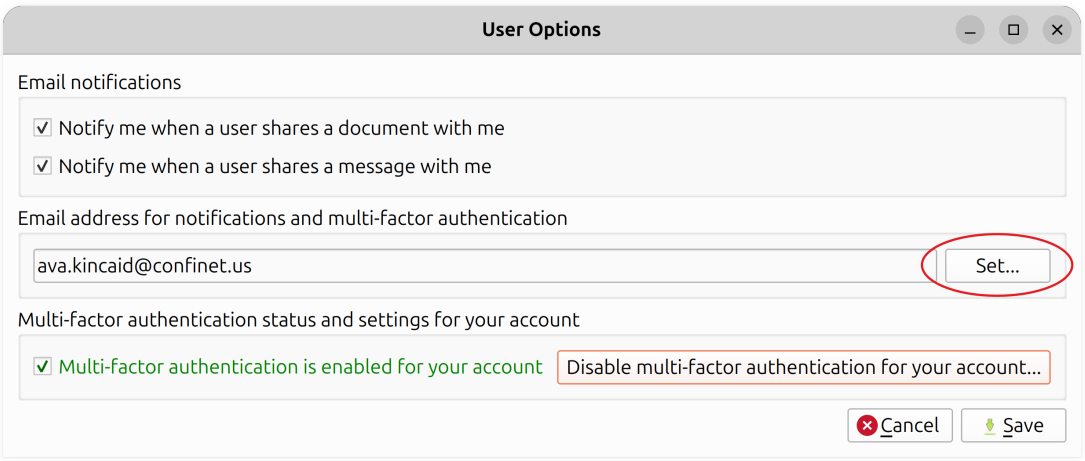


Figure 3.11: User Options dialog **Set...** button

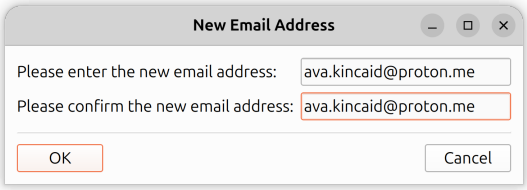


Figure 3.12: New Email Address dialog

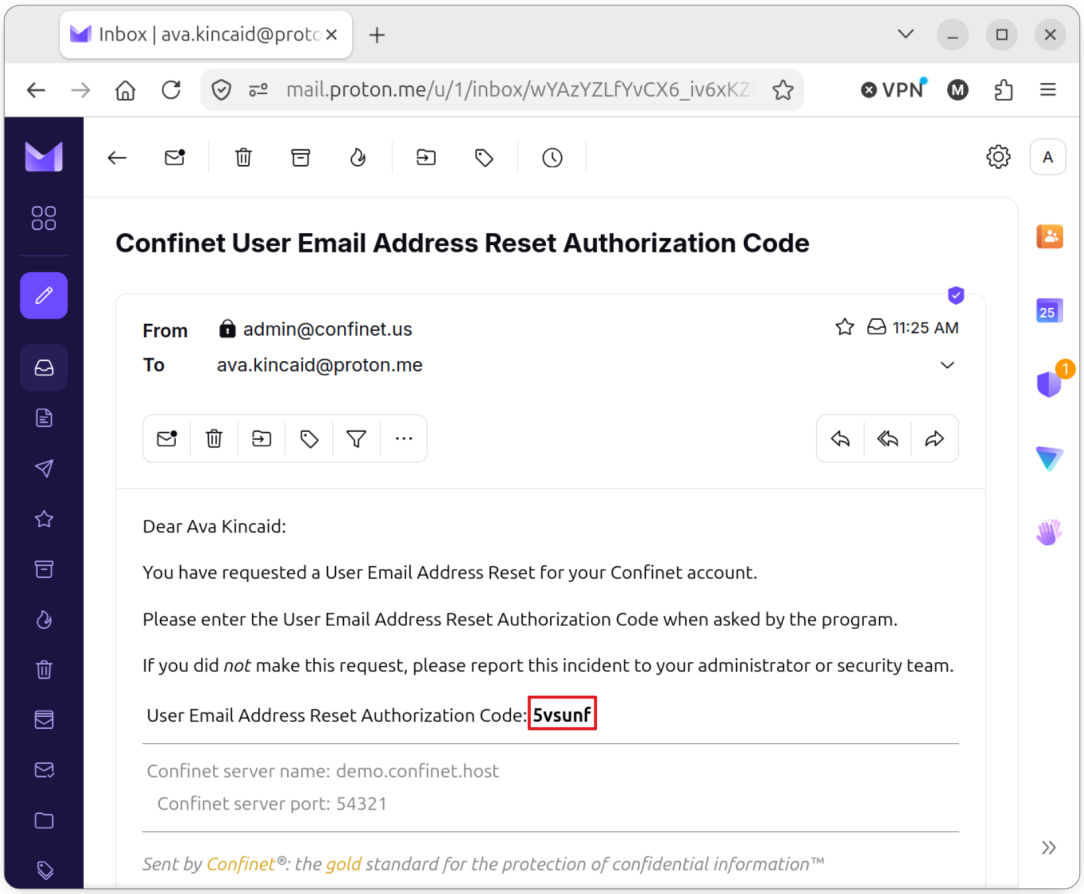


Figure 3.13: Confinet User Email Address Reset Authorization Code

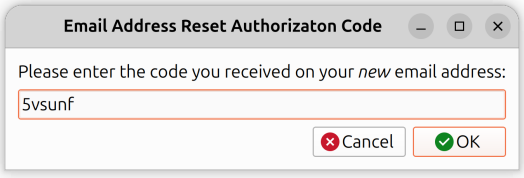


Figure 3.14: Email Address Reset Authorization Code Dialog

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.

(See Figures 3.11, 3.12, 3.13, 3.14)

To change the email address associated with your account:

1. Click the **Set...** button.

   ↪ The system displays the New Email Address dialog

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.

3.4.3 Multi-factor authentication

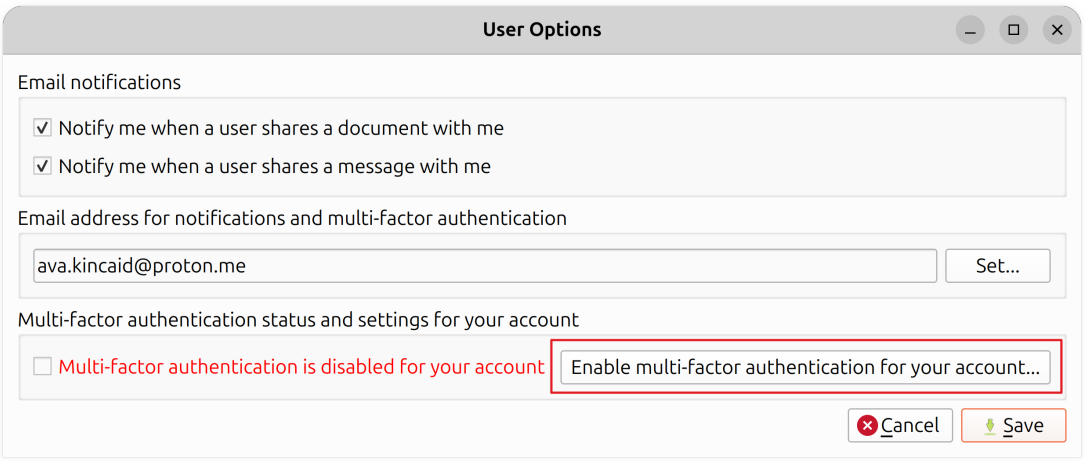


Figure 3.15: **Enable multi-factor authentication for your account...**

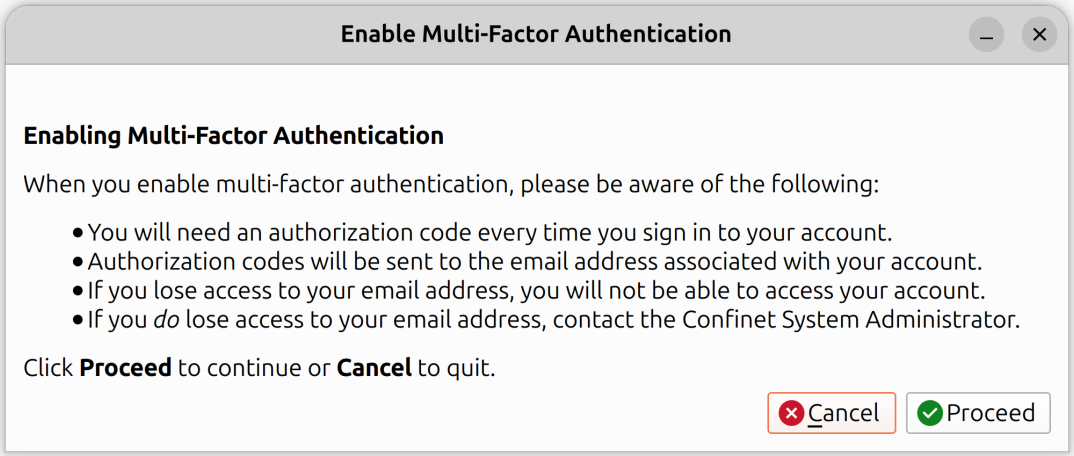


Figure 3.16: Enable Multi-Factor Authentication dialog

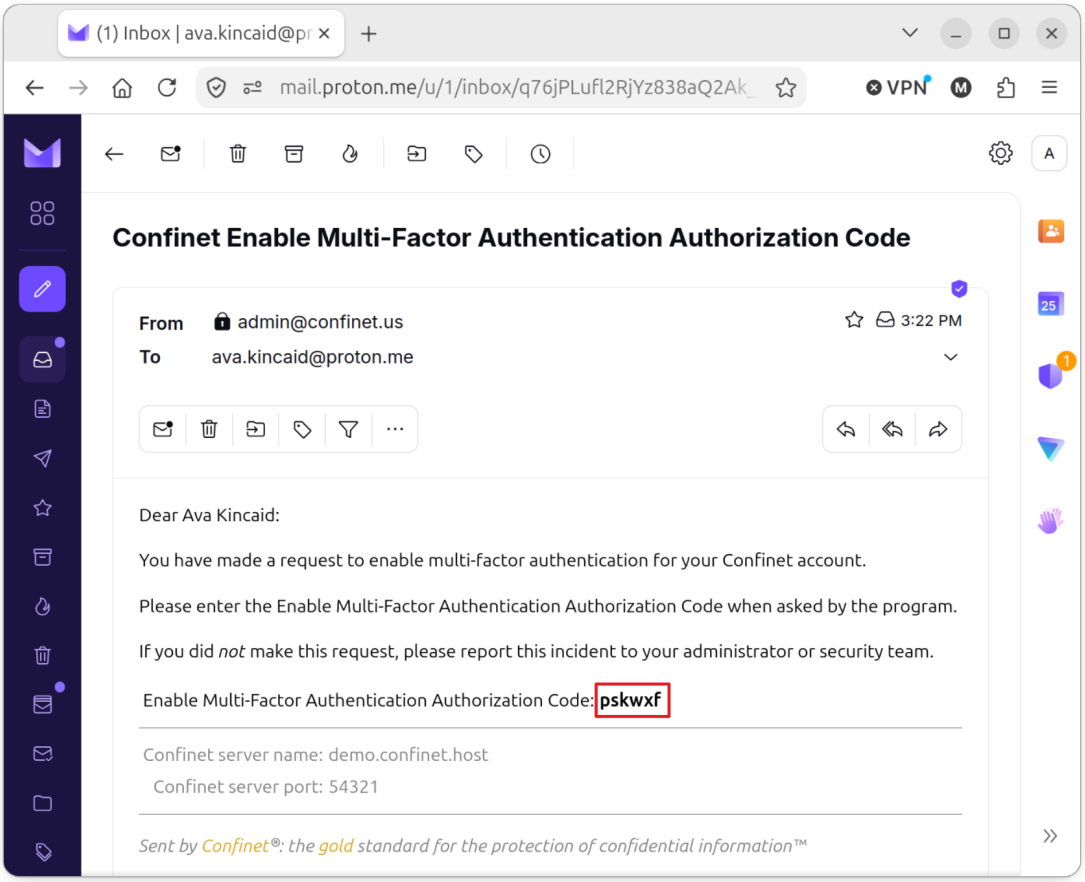


Figure 3.17: Confinet Enable Multi-Factor Authentication Authorization Code

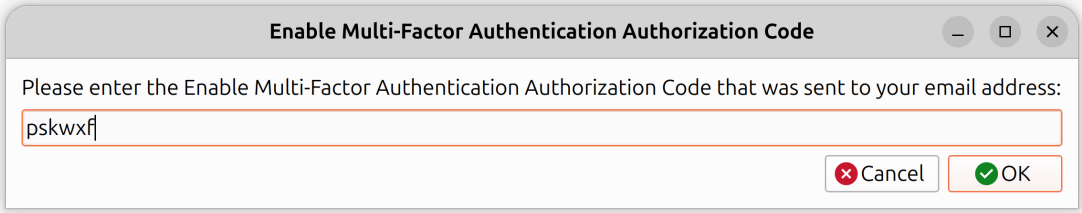


Figure 3.18: Enable Multi-Factor Authentication Authorization Code dialog

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: *(See Figures 3.15, 3.16, 3.17, 3.18)*

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.

3.5 Password reset

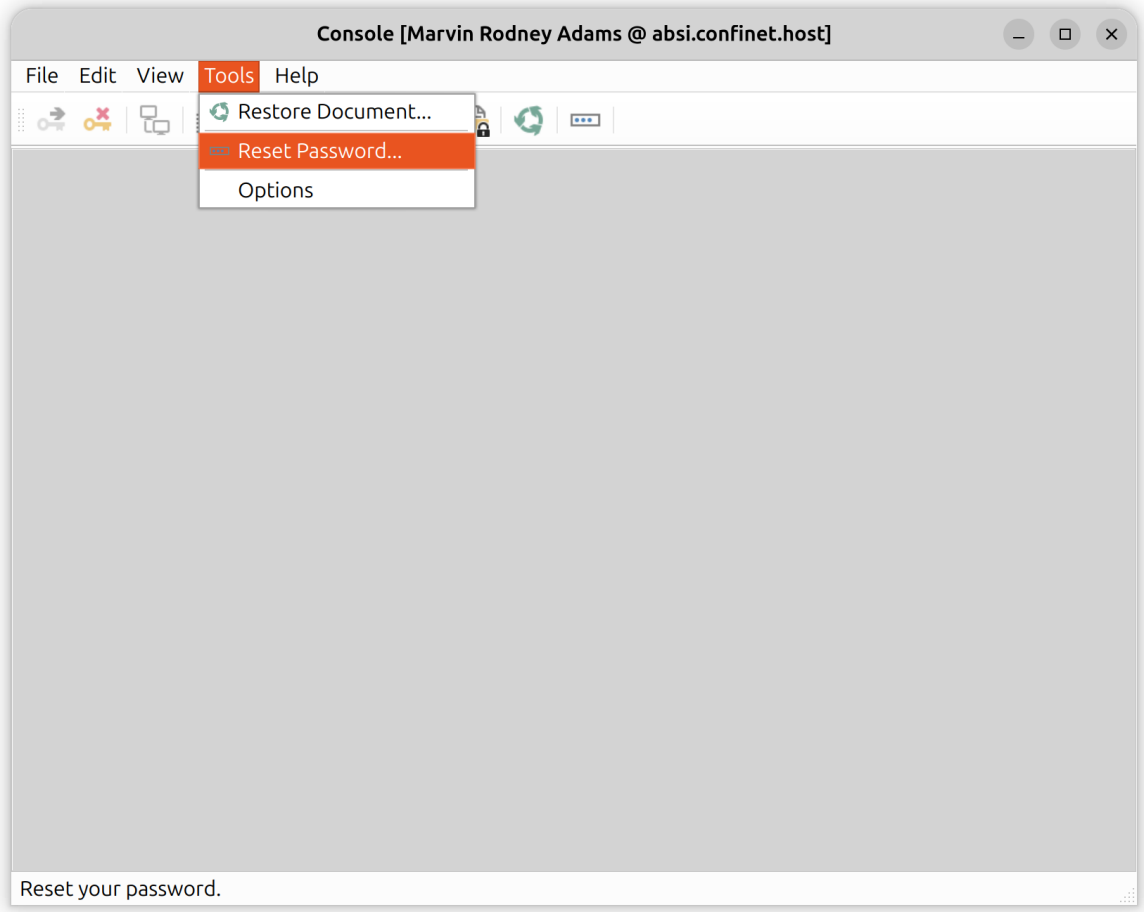


Figure 3.19: Console window **Reset Password...**

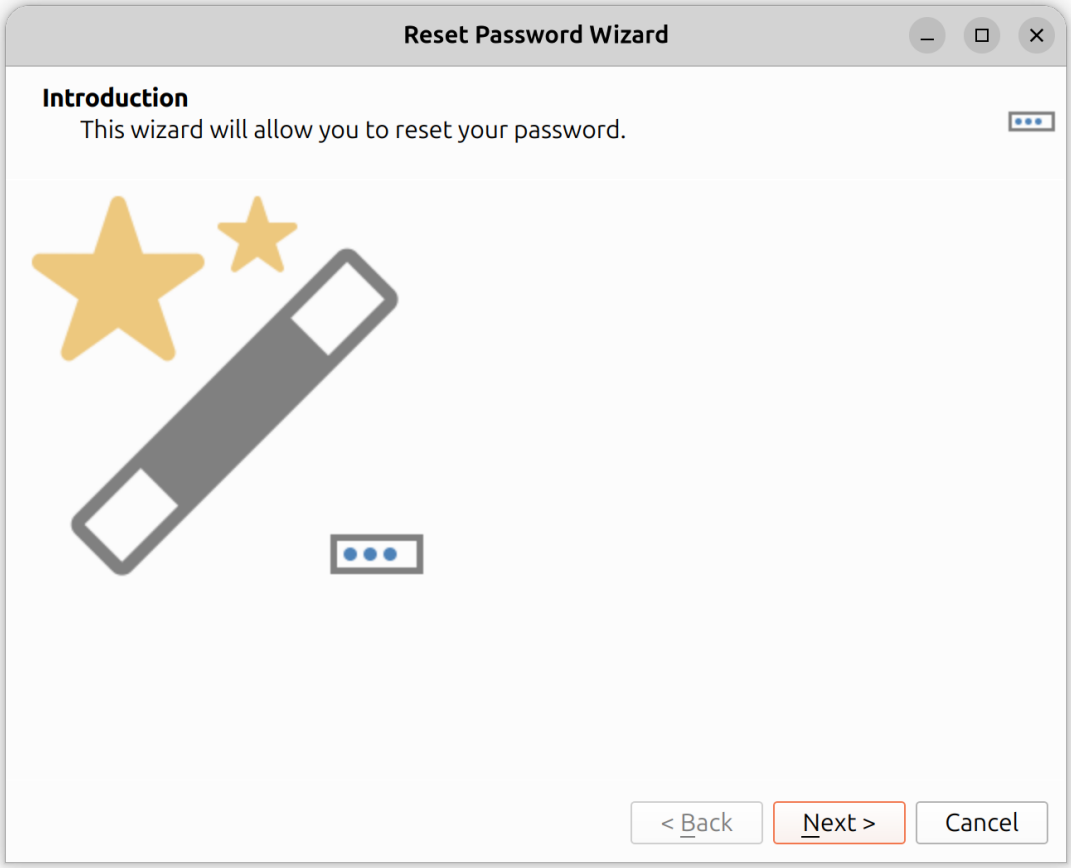


Figure 3.20: Reset Password Wizard Introduction

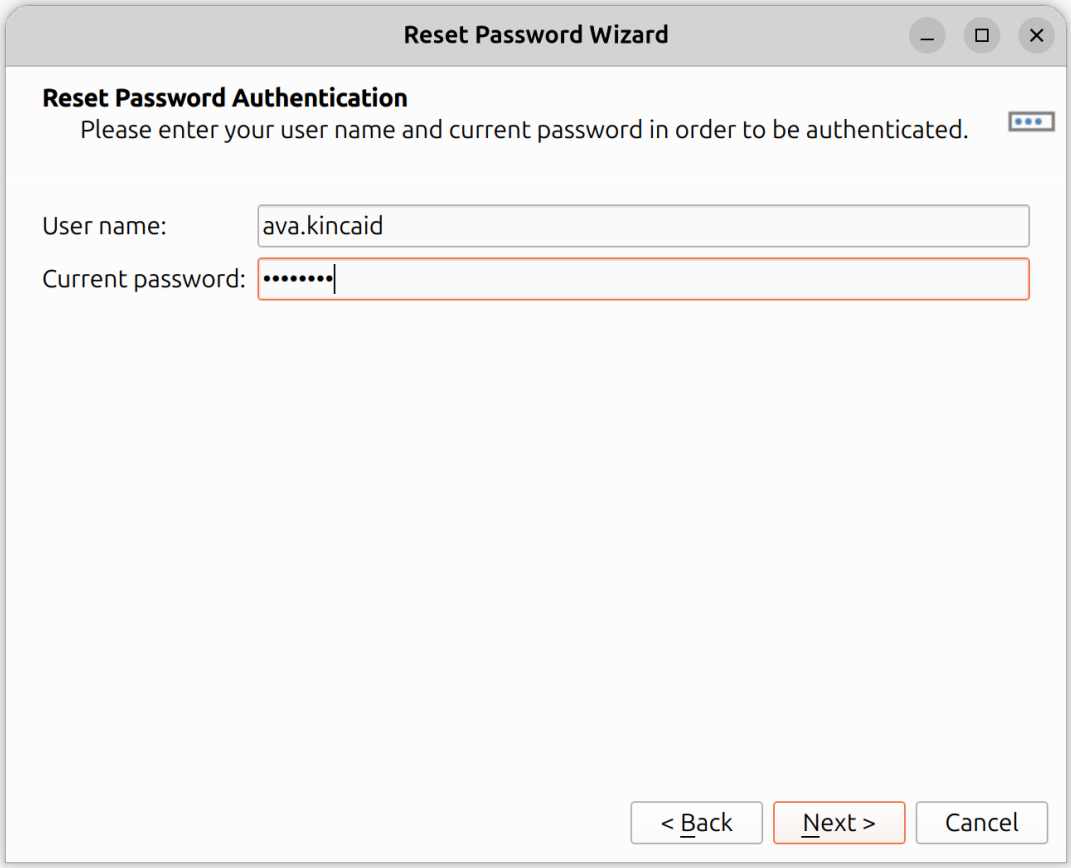


Figure 3.21: Reset Password Wizard Reset Password Authentication

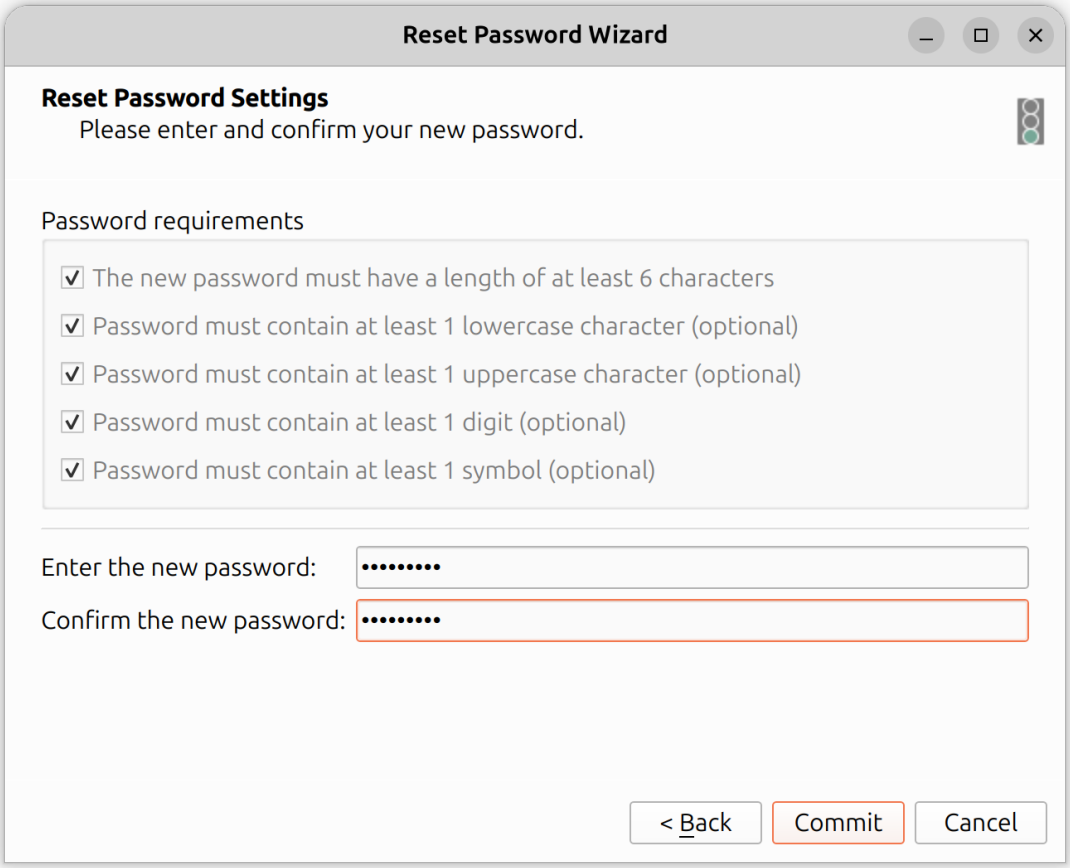


Figure 3.22: Reset Password Wizard Reset Password Settings

(See Figures 3.19, 3.20, 3.21, 3.22)

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 4

Confinet Security Model

4.1 Principles

The Confinet Security Model is based upon the following core principles:

1. Information is never shared by default
2. Information content can be dynamically updated at any time
3. Information security permissions can be dynamically updated at any time
4. Information is never automatically stored on a user's device
5. Information in transit is encrypted in accordance with standard cryptographic protocols
6. Information can be created, managed, shared, and protected within a single product suite

The rationale and implications of these principles are discussed below.

Information is never shared by default.

The rationale for this principle in a system designed to protect confidential information and intellectual property is *accountability*. When individuals in an organization create confidential information which can be shared without their knowledge or consent, they cannot be held accountable for the security of the information they create for the organization.

Since Confinet was designed in accordance with this principle, the Confinet Client never *automatically* shares information created by Confinet users with other Confinet users. In other words, in order for Confinet users to share information with other Confinet users, they must *explicitly*

share the information they have created with Confinet.

In addition, the Confinet Administrator program does *not* give Confinet Administrators access to information created by Confinet users; its only purpose is to administer Confinet groups and users.

Information content can be dynamically updated at any time.

The rationale for this principle in a system designed to protect confidential information and intellectual property is the ability to update information that is incorrect or out of date.

This is a necessary feature, since acting on information that is incorrect, or out of date, can have security ramifications. In short, preventing or controlling access to information that is incorrect or out of date is of little value to an organization.

Since Confinet was designed in accordance with this principle, the Confinet Client allows Confinet users to dynamically update their documents *and* messages at any time. For example, if a Confinet user updates the contents of a message, the new content will be seen the next time the recipients of the message open it.

Information security permissions can be dynamically updated at any time.

The rationale for this principle in a system designed to protect confidential information and intellectual property is the *dynamic* nature of privileged information concerning its classification and the nature of the roles individuals play in regard to its handling.

In many cases, the security classification of information is, for the most part, a function of time. For example, information that was considered confidential yesterday may be considered non-confidential today; or, information that was considered non-confidential yesterday may be considered confidential today.

Likewise, the nature of the roles that individuals play in regard to the handling of confidential information is also usually a function of time. For example, individuals may be granted or denied access to sensitive information based upon their job titles, or the projects they participate in.[1]

In recognition of this, the Confinet Client allows Confinet users to dynamically update the permissions of their documents and messages. For example, if a Confinet user disables the view permission of a message, the message will *not* be seen the next time the recipients open a Mes-

[1] All of which can, and often do, change over time.

sage Browser window (or refresh the contents of an existing Message Browser window). [2]

Information is never automatically stored on a user's device.

A system designed to protect confidential information and intellectual property must protect against the loss or theft of user devices. Thus, the Confinet Client never *automatically* stores information created by users on their devices.

A Confinet user may elect to export one of their documents or messages to a file on a persistent storage device; however, the Confinet Client itself will not automatically store or cache user information on a persistent storage device.

Information in transit is encrypted in accordance with standard cryptographic protocols.

With more and more people working remotely, it is imperative that sensitive information be protected whenever it is transmitted over public networks.

It is also essential that information be protected whenever it is transmitted over an organization's private networks since it is possible that an organization's private network could be compromised by an insider.[3]

The Confinet product suite features *always-on* encryption; information in transit is always encrypted, regardless of whether information is transmitted over a public or a private network.

Information can be created, managed, shared, and protected within a single product suite.

Since Confinet is based upon this principle, the Confinet product suite allows the members of an organization to create, manage, protect, and share confidential information without recourse to *any* third-party applications.

The creation, management, protection, and sharing of confidential information within a single, *managed* environment is the most effective way to uniformly enforce security constraints placed upon confidential information.

If information is created, managed, and shared by separate applications, the security of the information will only be as strong as the security afforded it by the *least* secure of the applications

[2] This will be true *wherever* the message is displayed, even if it is a part of a message thread.

[3] In fact, this is exactly what happened when a data-analyst contractor for Brightly Software abused his internal access in 2023 to steal sensitive corporate and employee data, then used that stolen data to threaten and extort the organization for financial gain.

handling the information.

The Confinet product suite eliminates this "weakest link" liability in the handling of sensitive information by providing a single environment wherein security constraints are uniformly applied to the handling of confidential information.[4]

4.2 Concepts

Unlike many security models, the Confinet Security Model employs *familiar* metaphors and was designed to be used by *everyone* in an organization, not just those with a technical background.

The Confinet Security Model employs just eight basic concepts that can be easily understood and applied to the protection of confidential information and intellectual property.

The basic concepts employed by the Confinet Security Model are listed below:

1. User
2. Group
3. Document
4. Message
5. Folder
6. Document key
7. Folder key
8. Group key

These basic concepts, as employed by the Confinet Security Model, are described in the following sections.

4.2.1 Users

A *user* is an individual with a Confinet account, created by a Confinet Administrator.

- Users have a *user name* and a *user password*.

[4] This design also significantly reduces the cost of handling confidential information, since only a single product suite is needed for this task.

- Users can reset their passwords at any time.
- Users cannot reset their user names.[5]
- User data is never stored or cached on a user device.
- User data is stored in a database on a secure server.

4.2.2 Groups

A *group* is a collection of Confinet users.

- Groups are created by a Confinet Administrator.
- Group data is never stored or cached on a user device.
- Group data is stored in a database on a secure server.

4.2.3 Documents

A *document* contains information that can be shared with one or more users.

- Document data is never *automatically* stored or cached on a user device.
- Document data is stored in a database on a secure server.
- History tables record all changes to document records.

4.2.4 Messages

A *message* contains information that can be *sent* to a group of Confinet users.

- Message permissions control what can be done with the contents of a message.
- Message permissions can be dynamically updated at any time.
- Message recipients can be dynamically updated at any time.
- Message content can be dynamically updated at any time.
- Message data is never *automatically* stored or cached on a user device.
- Message data is stored in a database on a secure server.

[5] A Confinet Administrator can reset a user name upon request.

- History tables record all changes to message records.

Messages are normally sent to other users; however, this is not always the case.[6]

4.2.5 Folders

A *folder* contains documents and subfolders.

- Every user has a *Home Folder*.
- Folder data is never stored or cached on a user device.
- Folder data is stored in a database on a secure server.

4.2.6 Document keys

A *document key* allows the owner of a document to grant access to another user.

- Document keys control *who* can access a document.
- Document keys control *how* a document can be accessed.
- Document keys control *when* a document can be accessed.
- Document keys can be inactivated, updated, or deleted at any time.
- Document key data is never stored or cached on a user device.
- Document key data is stored in a database on a secure server.

A *document keyring* is the collection of all document keys for a particular document.

4.2.7 Folder keys

A *folder key* allows the owner of a folder to grant access to another user.

- Folder keys control *who* can access a folder.
- Folder keys control *how* a folder can be accessed.
- Folder keys control *when* a folder can be accessed.

[6] For example, messages can be used as notes or a means by which you can bind together an arbitrary collection of documents.

- Folder keys can be inactivated, updated, or deleted at any time.
- Folder key data is never stored or cached on a user device.
- Folder key data is stored in a database on a secure server.

A *folder keyring* is the collection of all folder keys for a particular folder.

4.2.8 Group keys

A *group key* grants a user access to the users that are members of the group. The Confinet Administrator creates, manages, and administers group keys.

A Home Group is a group for which a user has a group key.

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

Chapter 5

Functional Overview

The Confinet Client provides the members of an organization with everything they need to create, manage, protect, and share confidential information and intellectual property.

In order to accomplish this, the Confinet Client is composed of a set of components that allow the members of an organization to accomplish these tasks.

The main components of the Confinet Client are listed below:

- Console window
- My Groups window
- Message Browser window
- Message Editor window
- Message Reader window
- Document Browser window
- Document Editor window
- Document Reader window
- Document Keyring window
- Folder Keyring window
- My Document Keyring window
- My Folder Keyring window

The following sections provide a functional overview of these components.

5.1 Console window

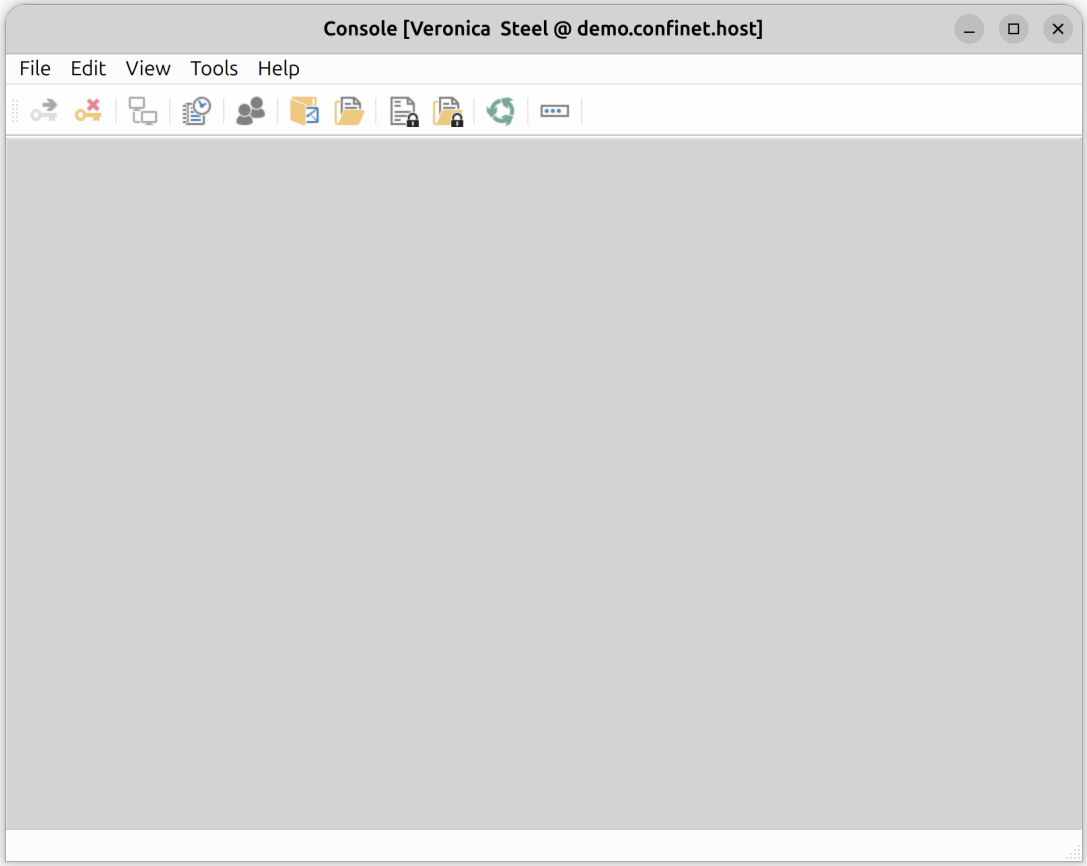


Figure 5.1: Console window

(See Figure 5.1)

The Console window allows you to perform the following tasks:

- Log on with the Log On dialog
- Set network settings with the Network Settings dialog
- Set picture directories with the Picture Directories dialog
- Set user options with the User Options dialog

- Create a My Groups window to manage your personal groups
- Create a Message Browser window to manage your messages
- Create a Document Browser window to manage your folders and documents
- Create a My Document Keyring window to view document keys created *for* you
- Create a My Folder Keyring window to view folder keys created *for* you
- Use the Restore Document wizard to restore a document you have deleted
- Use the Reset Password wizard to reset your password

5.2 My Groups window

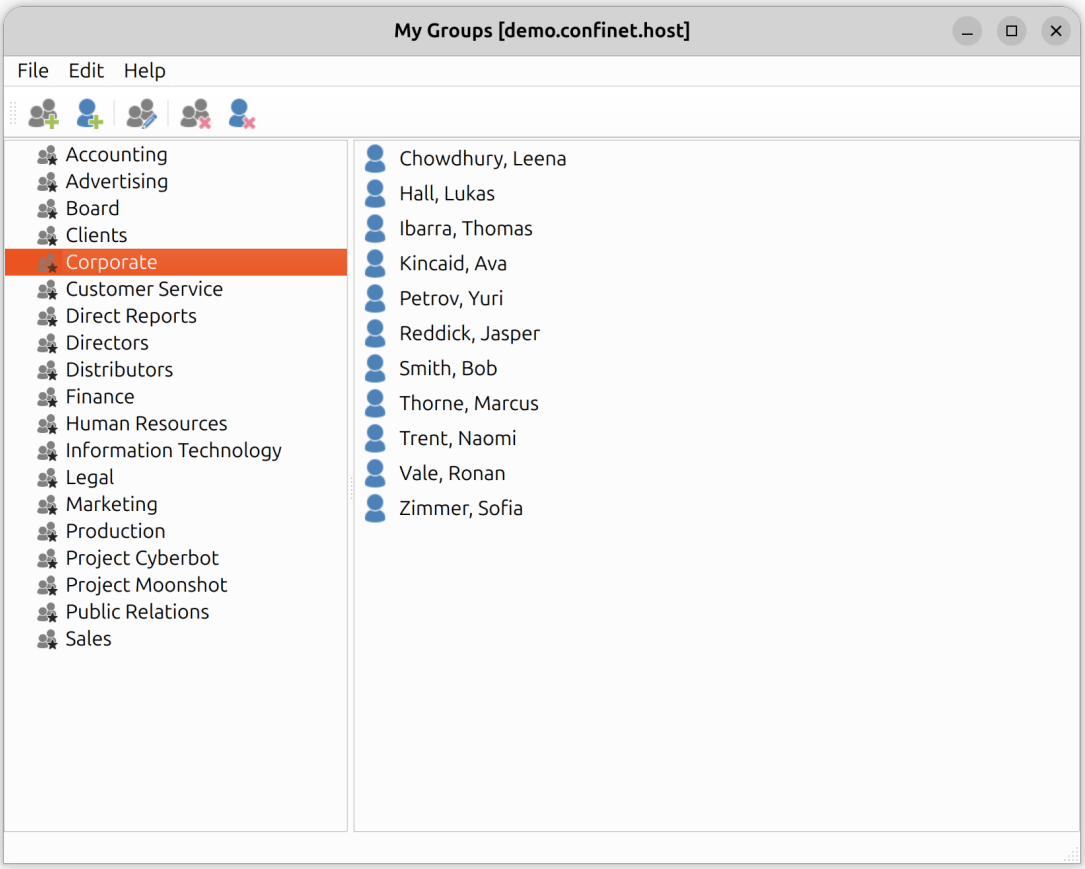


Figure 5.2: My Groups window

(See Figure 5.2)

A My Groups window allows you to perform the following tasks:

- Create a personal group for distribution of documents and messages
- Add a user to a personal group
- Remove a user from a personal group
- Delete a personal group

5.3 Message Browser window

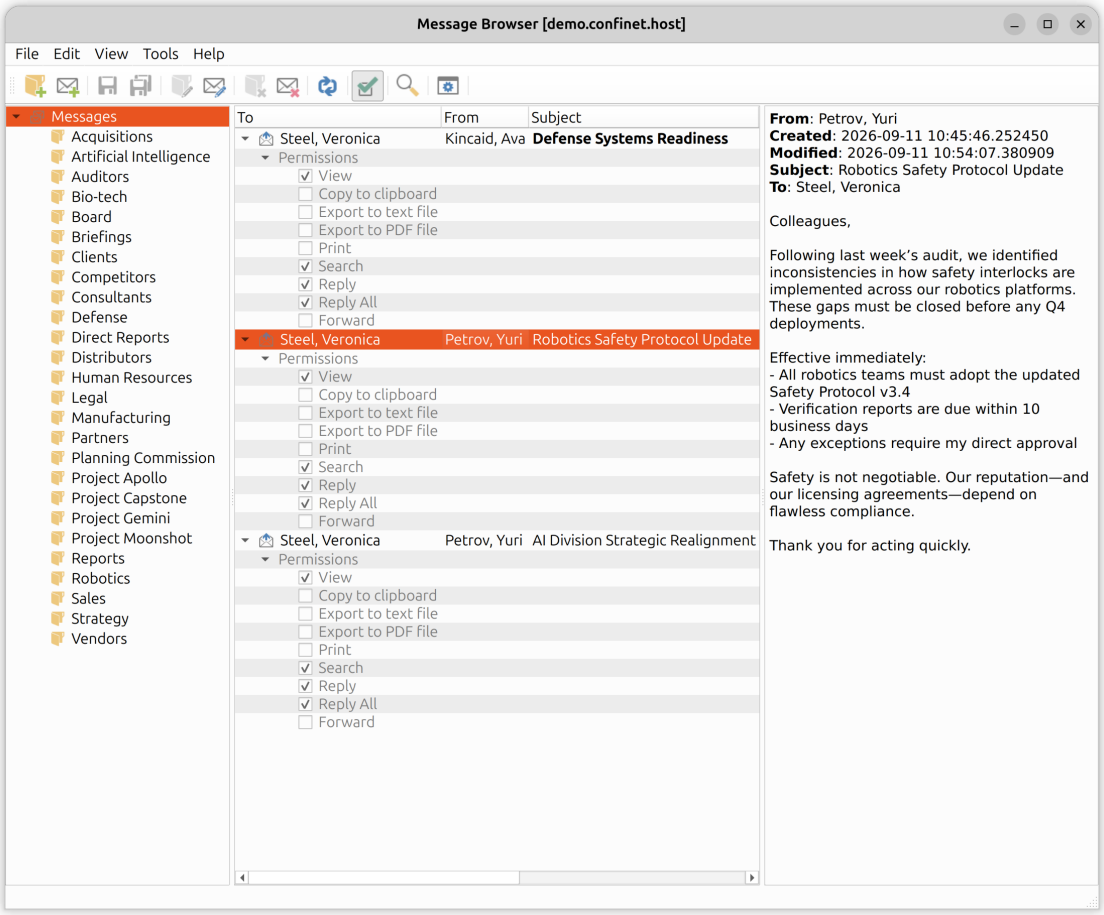


Figure 5.3: Message Browser window

A Message Browser window allows you to perform the following tasks: *(See Figure 5.3)*

- Create a message folder
- Rename a message folder
- Delete a message folder

- Open a message
- Create a message
- Edit a message
- Delete a message
- Update the permissions of a message
- Search for messages using multiple criteria

5.4 Message Editor window

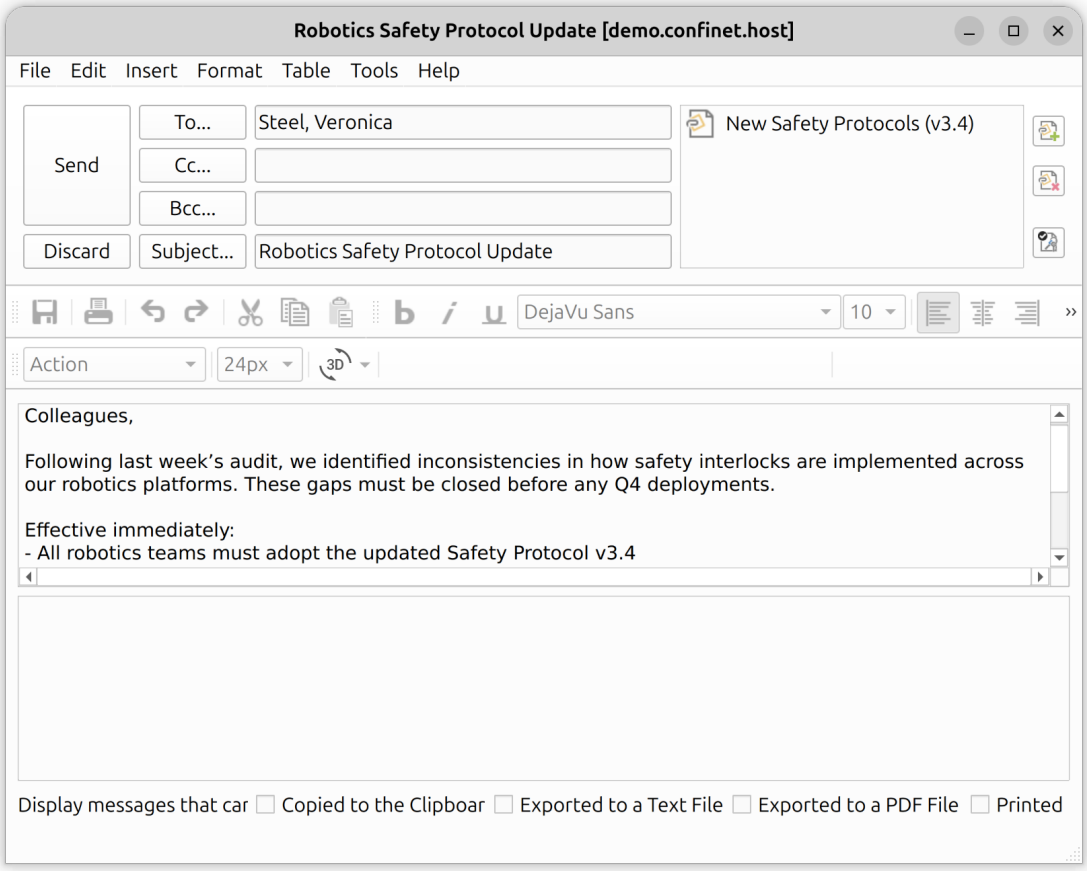


Figure 5.4: Message Editor window

A Message Editor window allows you to perform the following message-related tasks: *(See Figure 5.4)*

- Select the recipients of a message
- Attach documents to a message
- Edit or update the contents of a message
- Verify document keys for message recipients for any attached documents

5.5 Message Reader window

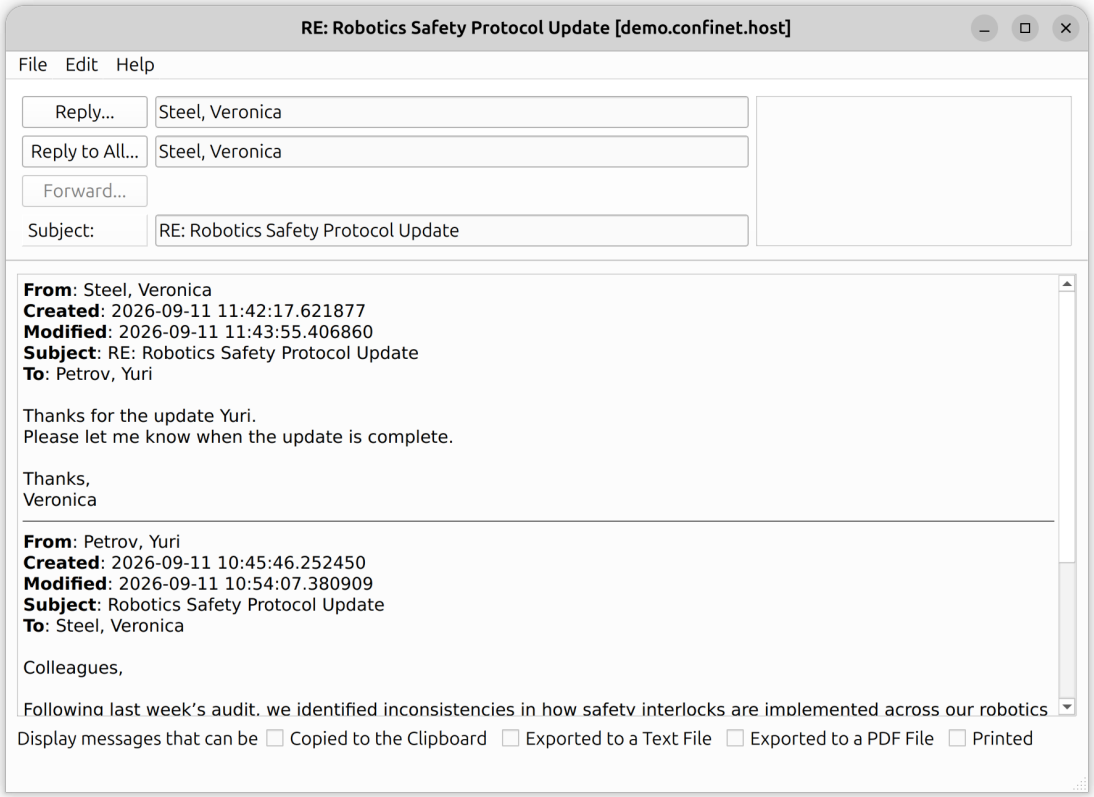


Figure 5.5: Message Reader window

(See Figure 5.5)

A Message Reader window allows you to perform the following message-related tasks:

- *Conditional*: View the contents of a message[1]
- *Conditional*: Export the contents of a message to a text file[2]
- *Conditional*: Export the contents of a message to a PDF file[3]

[1] Depends upon message permissions.
[2] See note 1.
[3] See note 1.

- *Conditional*: Print the contents of a message[4]
- *Conditional*: Copy the contents of a message to the clipboard[5]
- *Conditional*: Reply to the sender (**Reply**)[6]
- *Conditional*: Reply to the sender and all the recipients (**Reply to All**)[7]
- *Conditional*: Forward a message to other users (**Forward**)[8]
- *Conditional*: Open a document attachment[9]

[4]See note 1.
[5]See note 1.
[6]See note 1.
[7]See note 1.
[8]See note 1.
[9]Message recipient must have an active document key for the attached document.

5.6 Document Browser window

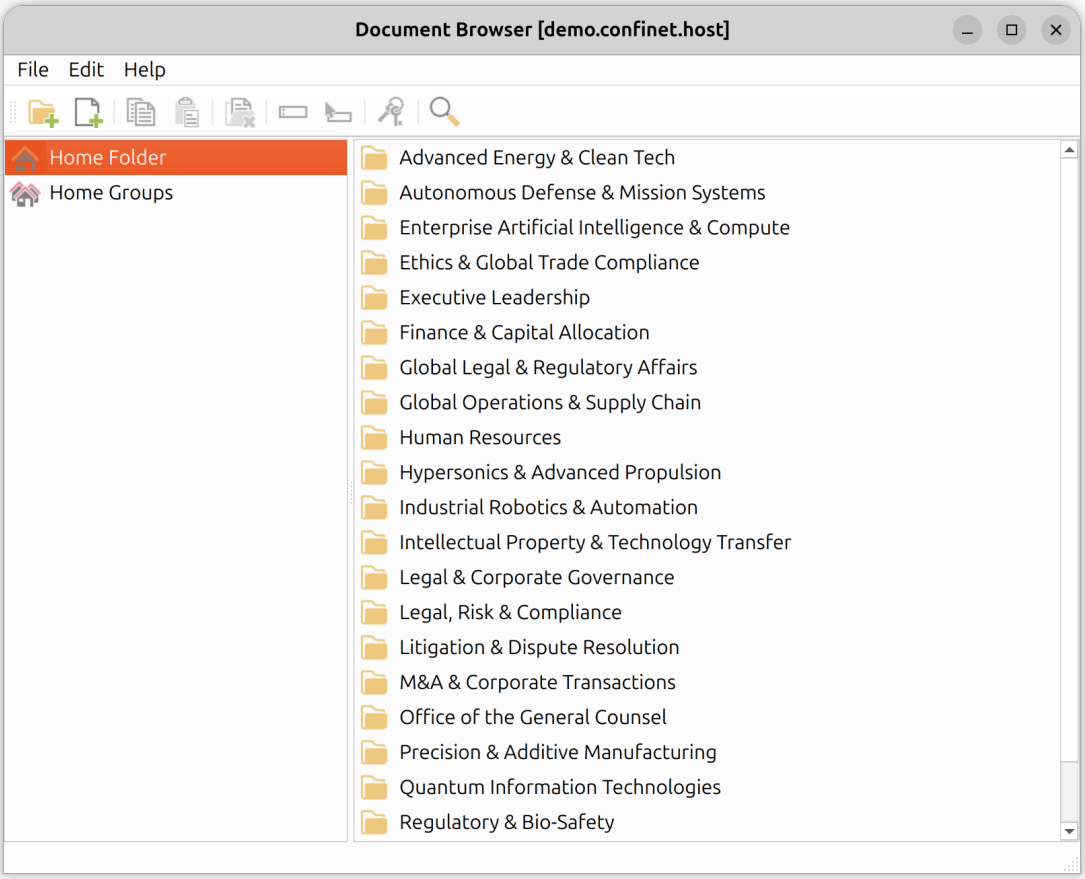


Figure 5.6: Document Browser window

(See Figure 5.6)

A Document Browser window allows you to perform the following tasks:

- Open your Home Folder
- Open your Home Groups
- Create a folder
- Create a document

- Open a folder
- Open a document
- Rename a folder
- Rename a document
- Delete a folder
- Delete a document
- Open a folder keyring
- Open a document keyring
- Search for documents using multiple criteria

5.7 Document Editor window

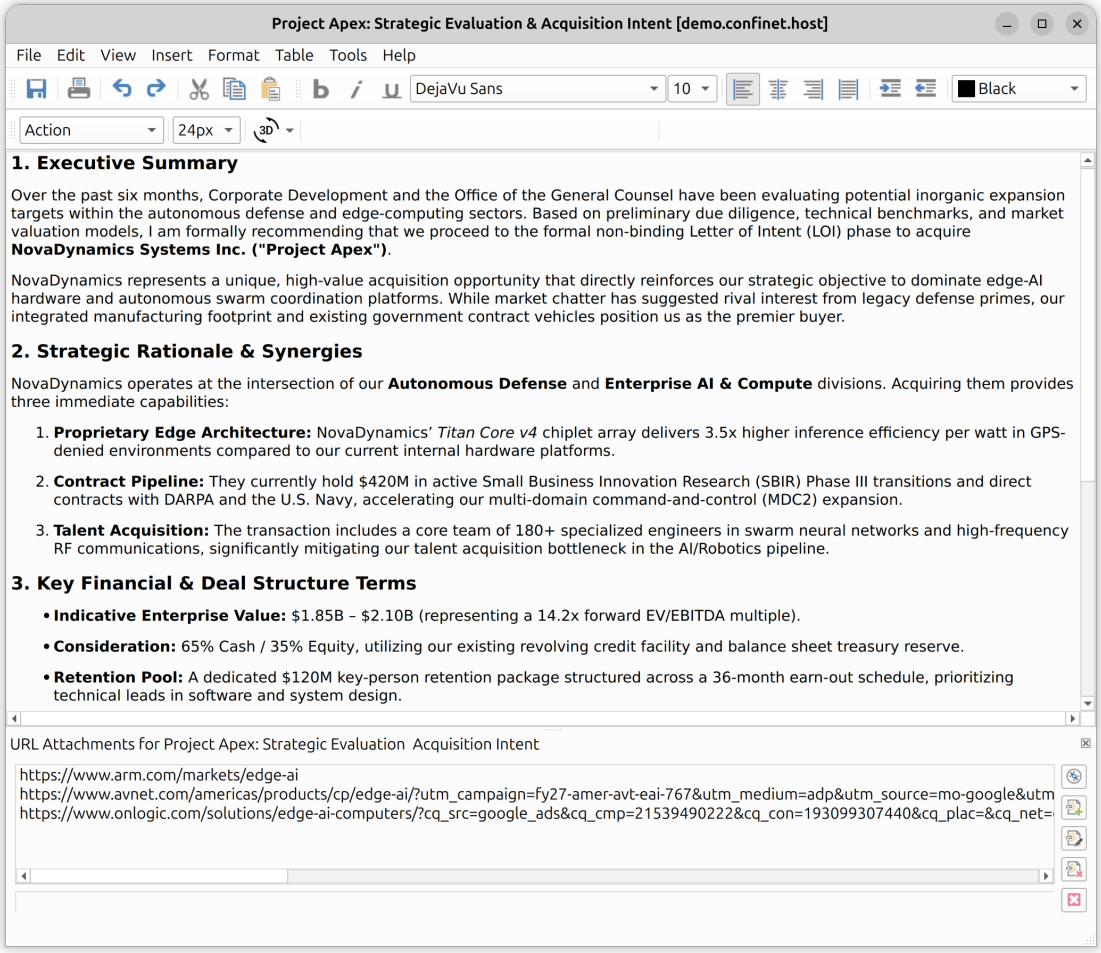


Figure 5.7: Document Editor window

(See Figure 5.7) A Document Editor window allows you to perform the following tasks:

- View the contents of a document
- Edit and save the contents of a document
- Format the contents of a document

- Insert an itemized list into a document
- Insert an enumerated list into a document
- Insert a table into a document
- Insert a picture reference into a document
- Insert an icon into a document[10]
- Find text in a document
- Find and replace text in a document
- Check the spelling of the text in a document
- Add words to a personal dictionary[11]
- Export the contents of a document to a text file
- Export the contents of a document to a PDF file
- Print the contents of a document
- View previous revisions of a document

[10] Select an icon from standard icon sets (actions, alerts, audiovisual, etc.) that include many selections.

[11] The personal dictionaries of users are *not* stored or cached on their devices. User-defined words, especially acronyms and abbreviations, could provide an adversary with information that could be analyzed to infer sensitive information (for example, the names or nature of classified projects or products).

5.8 Document Reader window

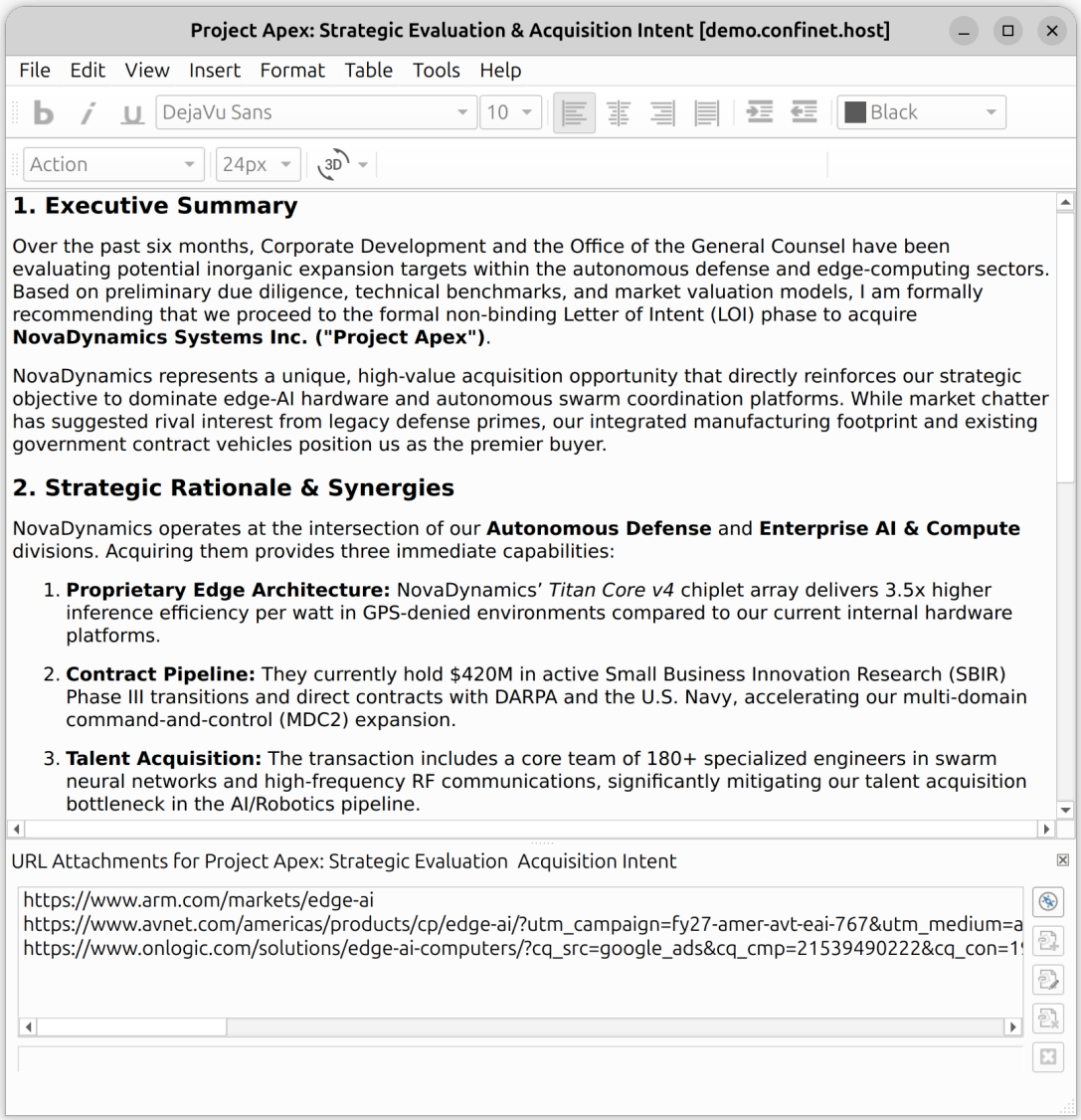


Figure 5.8: Document Reader window

If you have a document key for a document created by another user, a Document Reader window can allow you to perform the following tasks: *(See Figure 5.8)*

- *Conditional*: View the contents of the document[12]
- *Conditional*: Update the contents of the document[13]
- *Conditional*: Copy the contents of the clipboard to the document[14]
- *Conditional*: Copy the contents of the document to the clipboard[15]
- *Conditional*: Export the contents of the document to a text file[16]
- *Conditional*: Export the contents of the document to a PDF file[17]
- *Conditional*: Print the contents of the document[18]
- *Conditional*: Search the contents of the document[19]

[12] Depends upon the permissions of the document key.
[13] See footnote 12.
[14] See footnote 12.
[15] See footnote 12.
[16] See footnote 12.
[17] See footnote 12.
[18] See footnote 12.
[19] See footnote 12.

5.9 Document Keyring window

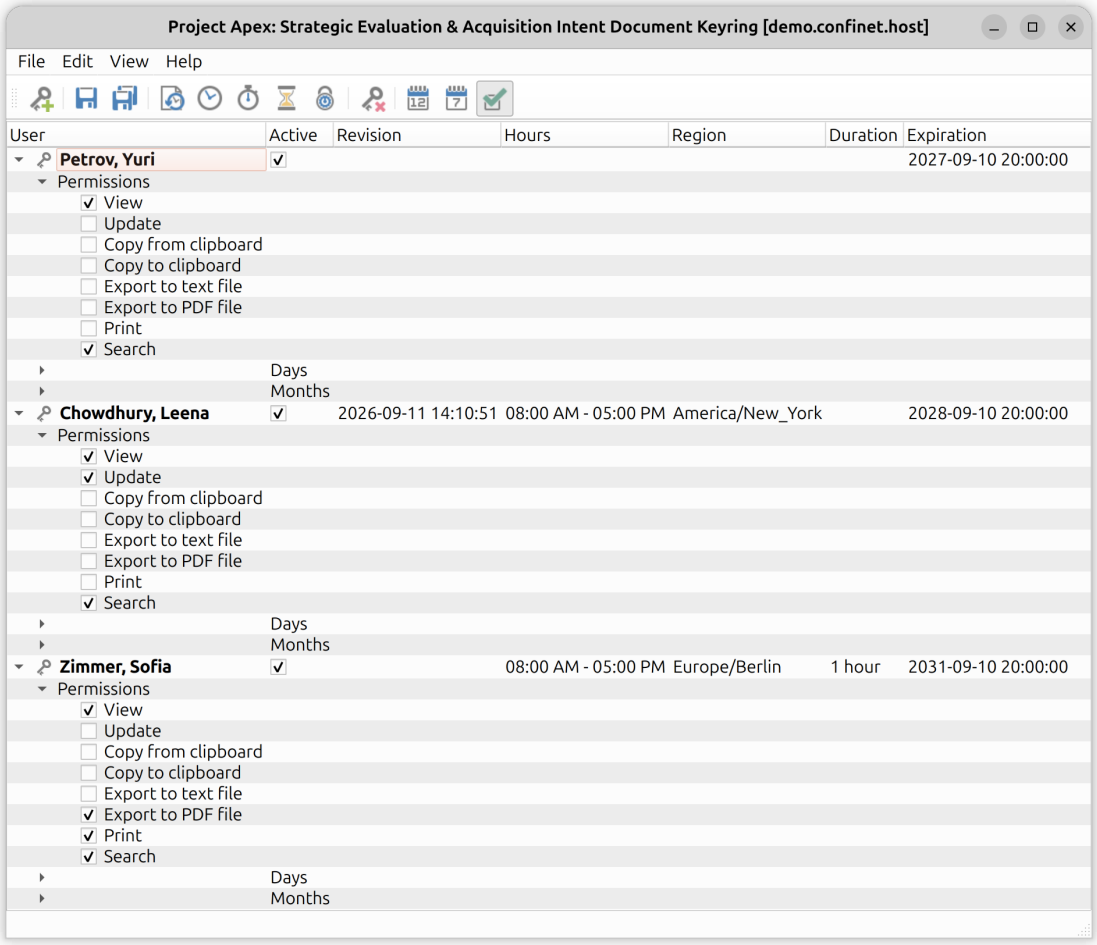


Figure 5.9: Document Keyring window

Every document you create has an associated *document keyring* which can have zero or more document keys. A document keyring is the collection of all document keys for a particular document.

(See Figure 5.9) A Document Keyring window allows you to perform the following tasks:

- View the document keyring for a particular document

- Create a document key for a user
- Delete a document key
- Edit the permissions for a document key
- Set the *active* status for a document key
- Set the months of the year during which a document key is active
- Set the days of the week on which a document key is active
- Set the hours of the day during which a document key is active
- Set the session duration associated with a document key
- Set the expiration date of a document key
- Set the revision of the document associated with a document key
- Set a passcode for a document key

5.10 Folder Keyring window

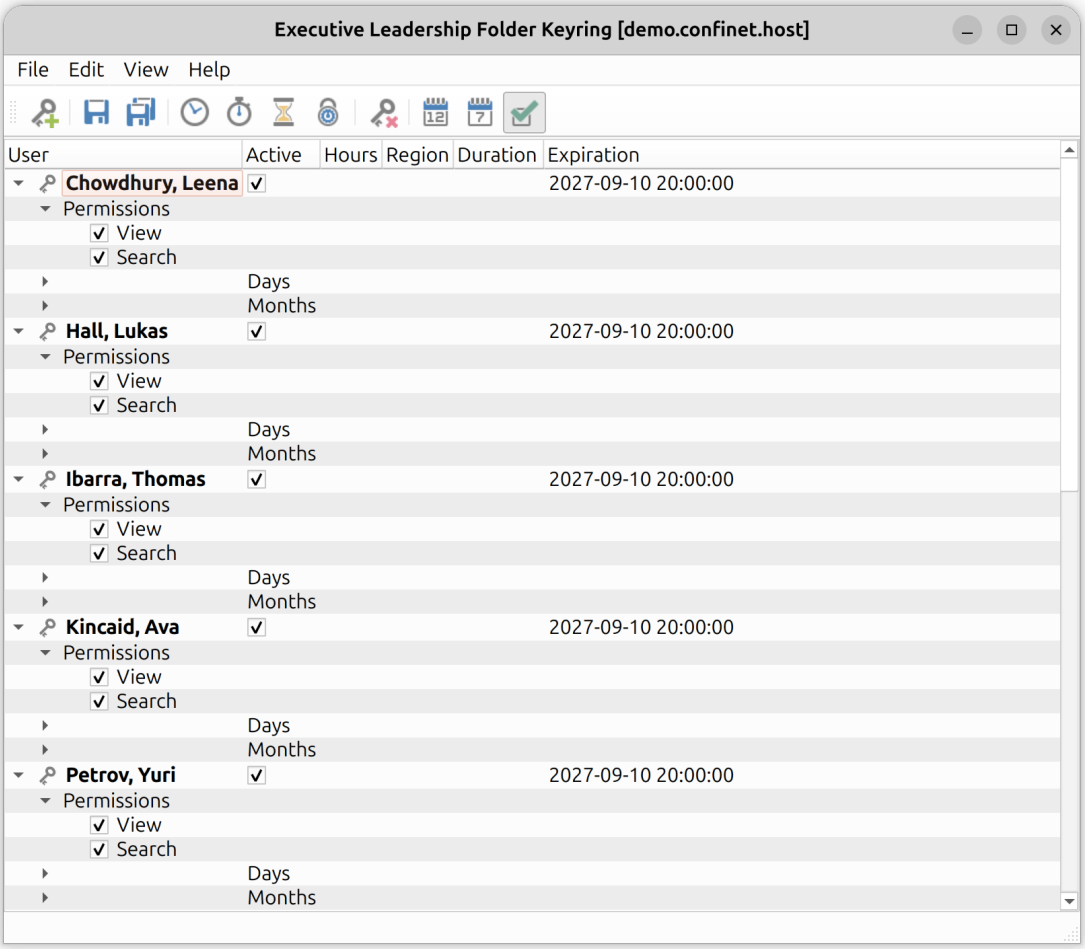


Figure 5.10: Folder Keyring window

Every folder you create has an associated *folder keyring*. A folder keyring is the collection of all folder keys for a particular folder.

(See Figure 5.10) A Folder Keyring window allows you to perform the following tasks:

- View the folder keyring for a particular folder

- Create a folder key for a particular user
- Delete a folder key
- Set the permissions of a folder key
- Set the *active* status for a folder key
- Set the months of the year during which a folder key is active
- Set the days of the week on which a folder key is active
- Set the hours of the day during which a folder key is active
- Set the session duration associated with a folder key
- Set the expiration date of a folder key
- Set a passcode for a folder key

5.11 My Document Keyring window

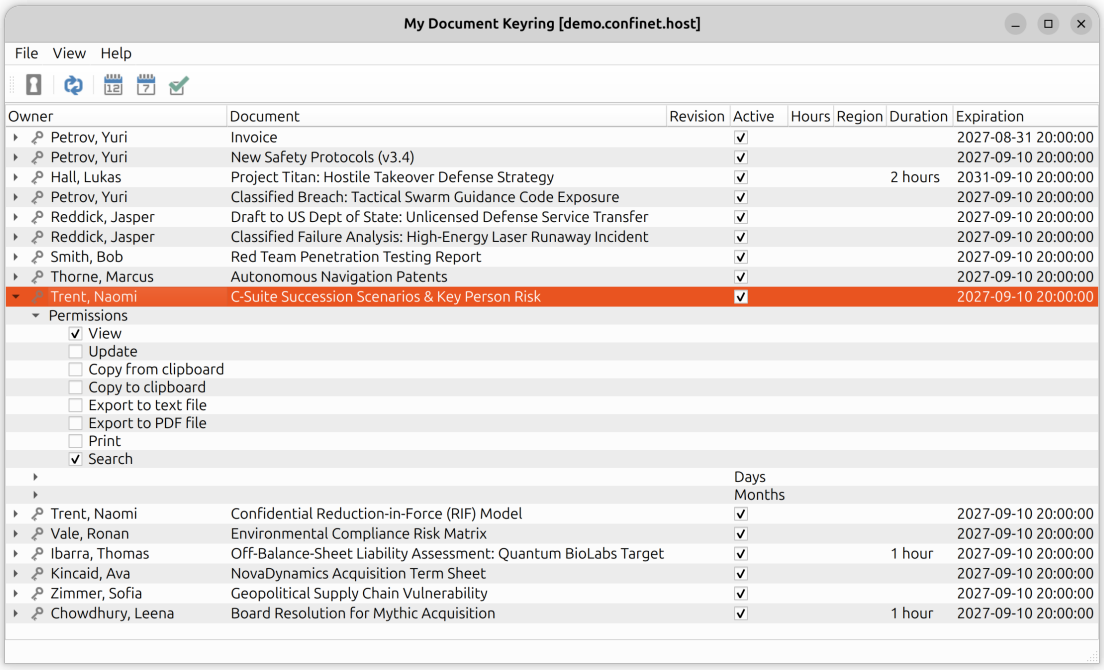


Figure 5.11: My Document Keyring window

The My Document Keyring window allows you to view the document keys created *for you*.

(See Figure 5.11) The My Document Keyring window allows you to perform the following tasks:

- View the name of the document associated with a document key
- View the owner associated with a document key
- View the revision of the document associated with a document key
- View the active status of a document key
- View the months of the year during which a document key is active
- View the days of the week on which a document key is active

- View the hours of the day during which a document key is active
- View the permissions of a document key
- *Conditional*: Open the document associated with a document key[20]

5.12 My Folder Keyring window

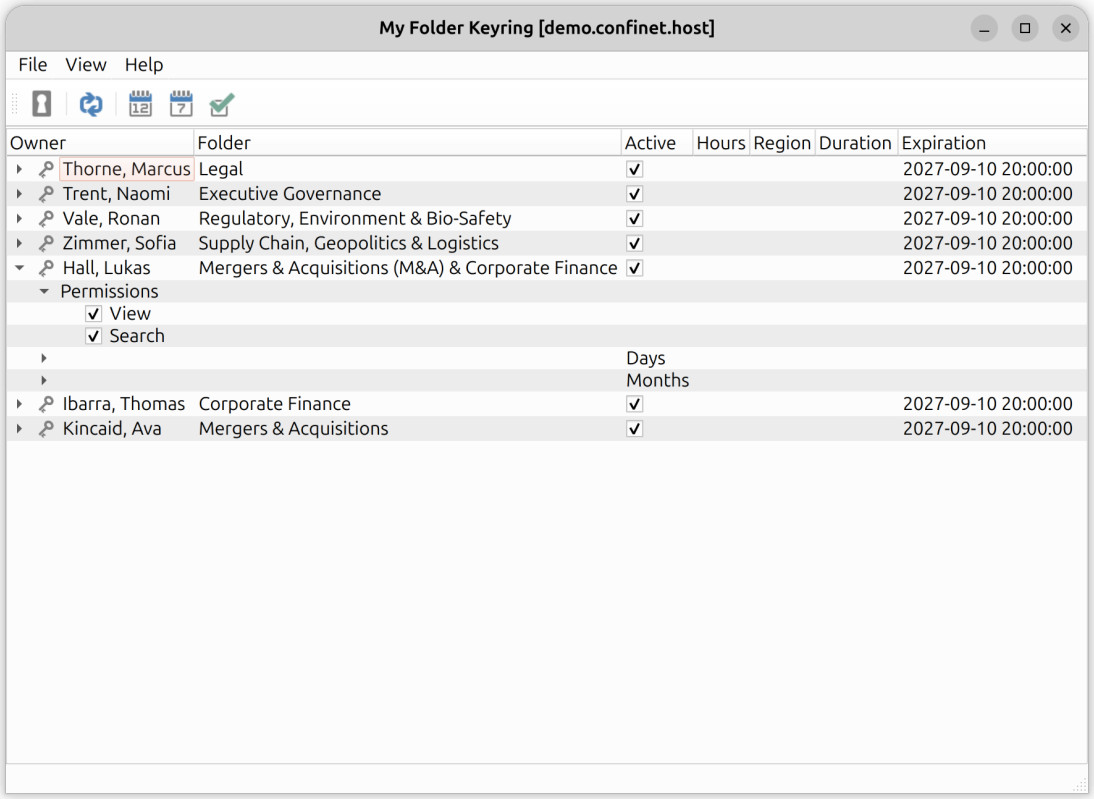


Figure 5.12: My Folder Keyring window

A My Folder Keyring window allows you to view the folder keys created *for you*.

A My Folder Keyring window allows you to perform the following tasks: *(See Figure 5.12)*

[20] Depends upon the active status and permissions of the document key.

- View the name of the folder associated with a folder key
- View the owner associated with a folder key
- View the active status of a folder key
- View the months of the year during which a folder key is active
- View the days of the week on which a folder key is active
- View the hours of the day during which a folder key is active
- View the permissions of a folder key
- *Conditional*: Open the folder associated with a folder key[21]

[21] Depends upon the active status and permissions of the folder key.

Part II

Documents, Folders, and Messages

Chapter 6

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

6.1 Creating documents

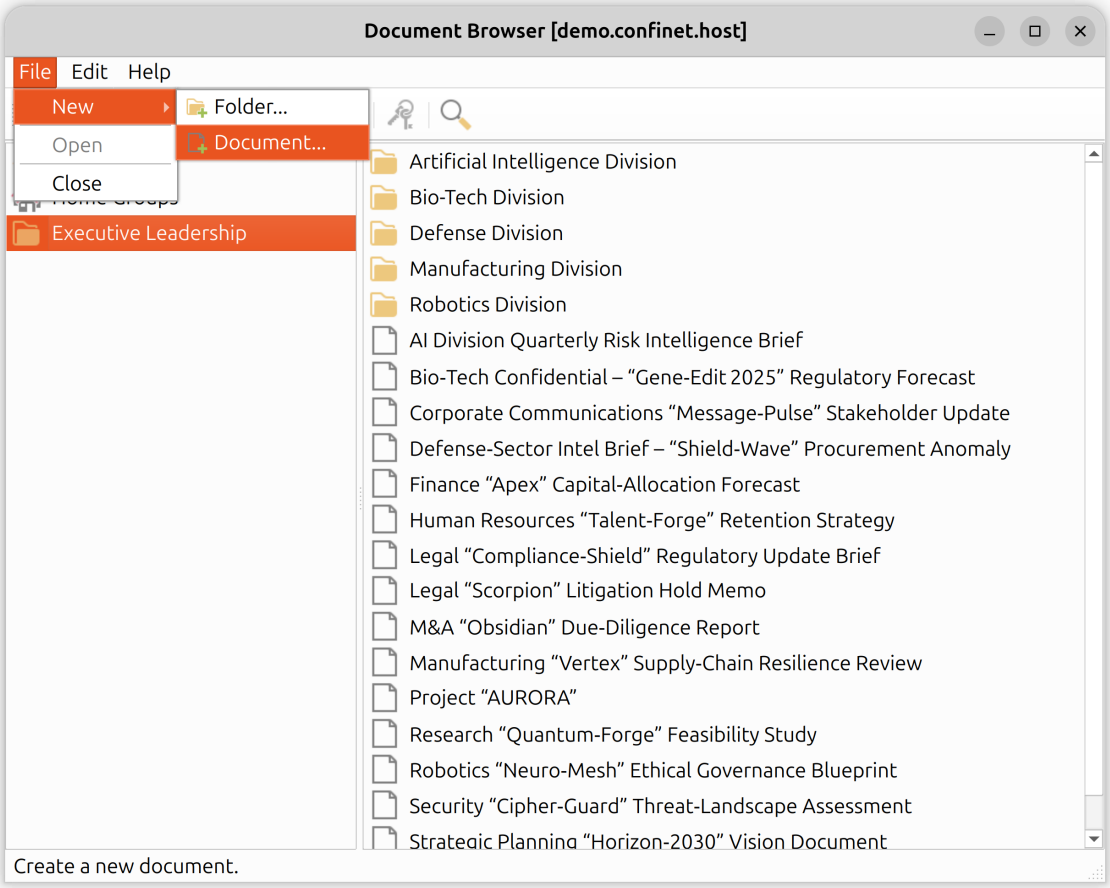


Figure 6.1: Creating a new document

(See Figures 6.1, 6.2)

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]

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

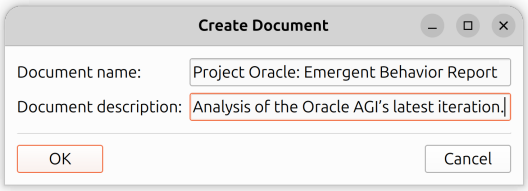


Figure 6.2: Create Document dialog

4. Click **OK** to create the new document.

6.2 Renaming documents

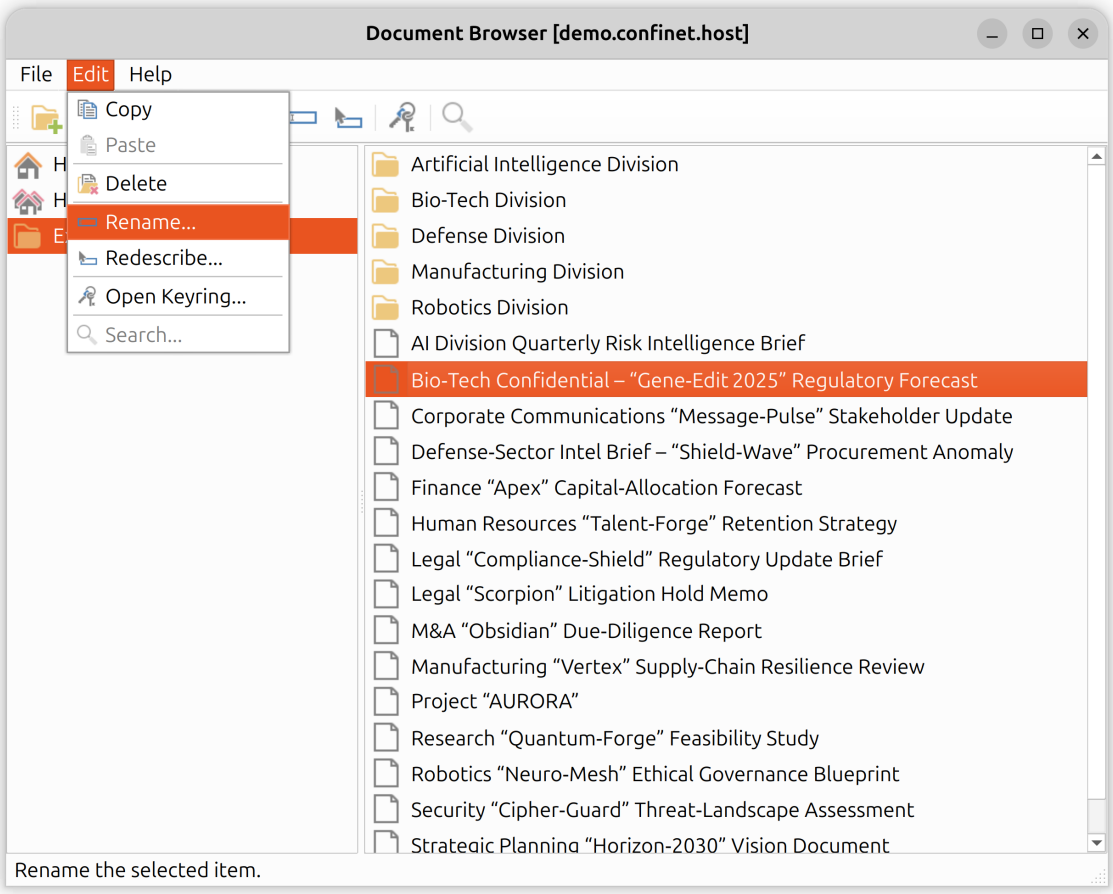


Figure 6.3: Renaming a document

(See Figures 6.3, 6.4)

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.

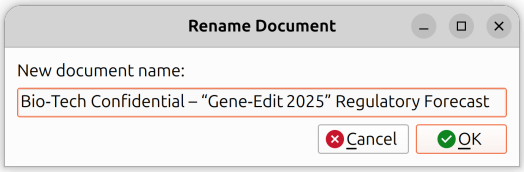


Figure 6.4: Rename Document dialog

6.3 Deleting documents

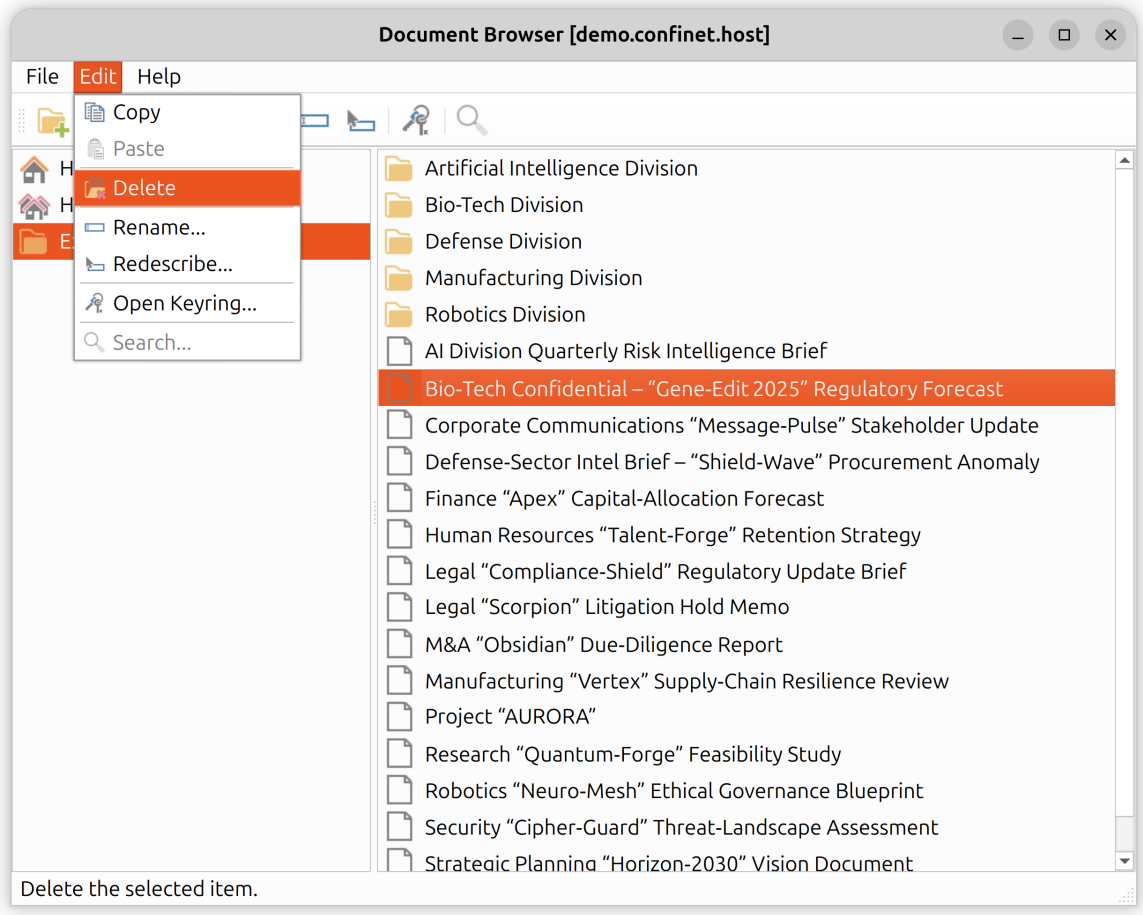


Figure 6.5: Deleting a document

(See Figures 6.5, 6.6)

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.

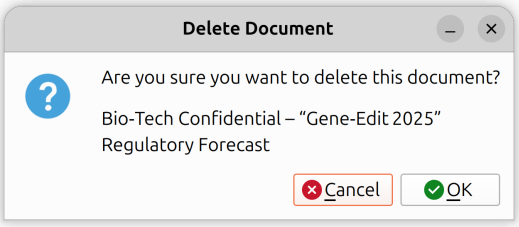


Figure 6.6: Delete Document confirmation

6.4 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.

6.4.1 Basic editing tasks

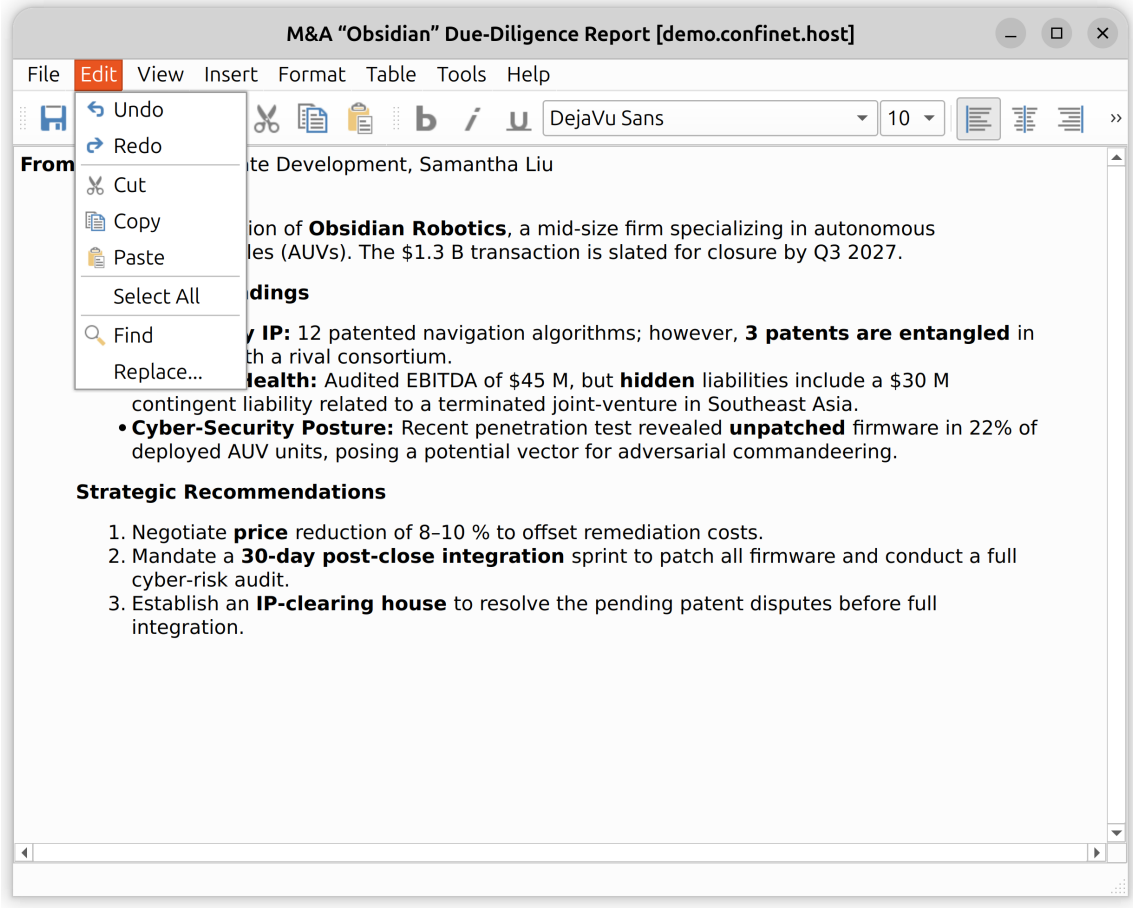


Figure 6.7: **Edit** menu

(See Figure 6.7)

6.4.1.1 Undoing an edit

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

6.4.1.2 Redoing an edit

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

6.4.1.3 Delete the selection and copy it to the clipboard

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

6.4.1.4 Copy the selection to the clipboard

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

6.4.1.5 Insert text you have copied to the clipboard

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

6.4.1.6 Select all text in the document

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

6.4.2 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.

6.4.3 Font name

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

6.4.4 Font size

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

6.4.5 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.

6.4.6 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.

6.4.7 Text color

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

6.4.8 Inserting lists

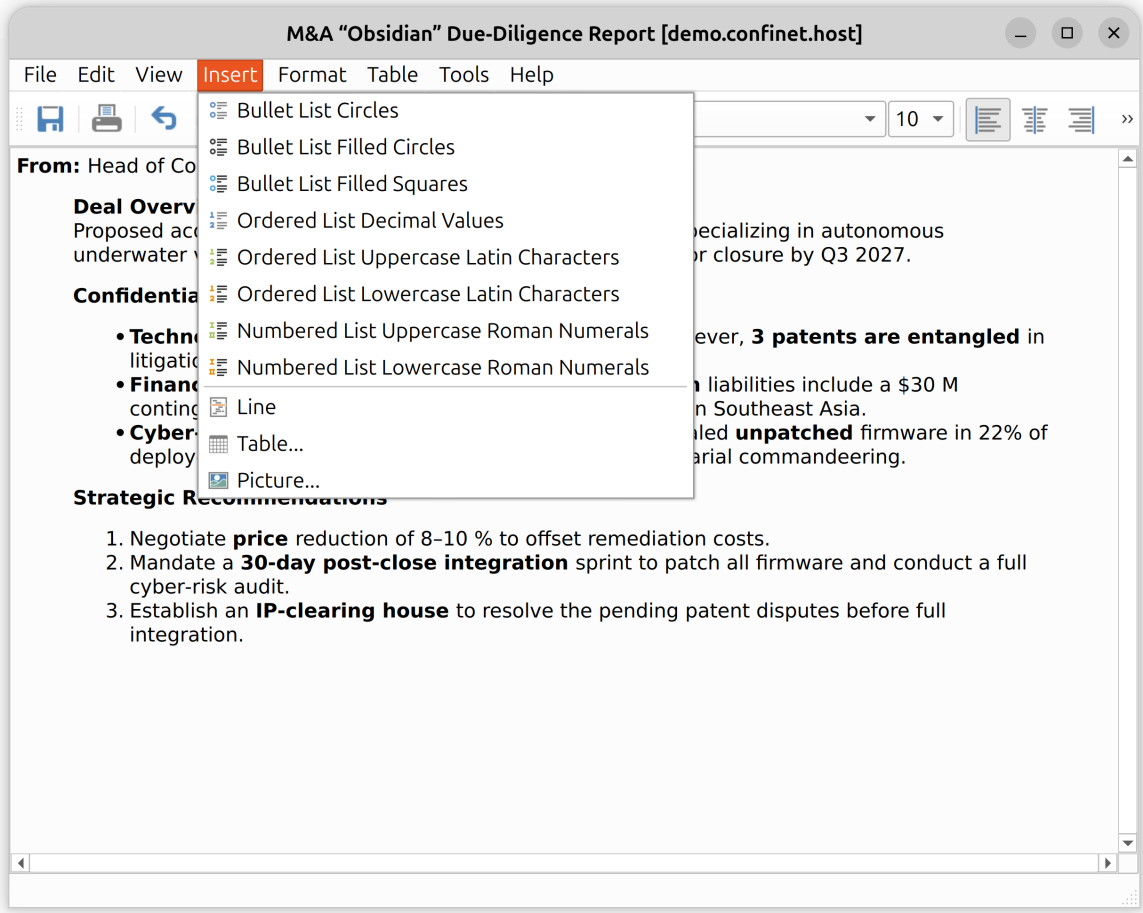


Figure 6.8: **Insert** menu

From the **Insert** menu, you can insert lists with one of the following styles: *(See Figure 6.8)*

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

6.4.9 Inserting lines

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

6.4.10 Inserting tables

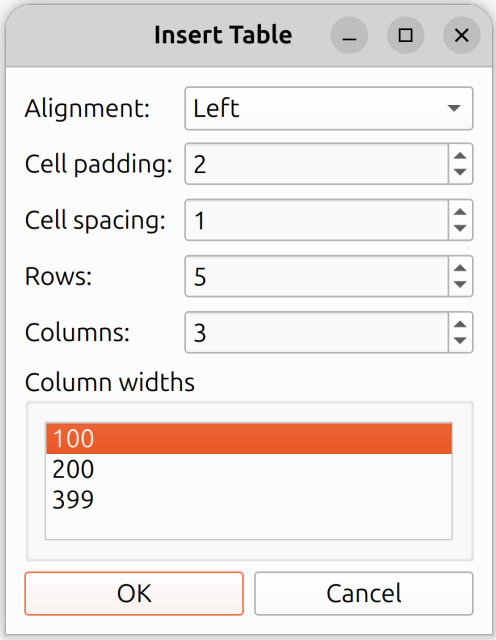


Figure 6.9: Insert Table dialog

(See Figure 6.9) 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.

6.4.11 Inserting icons

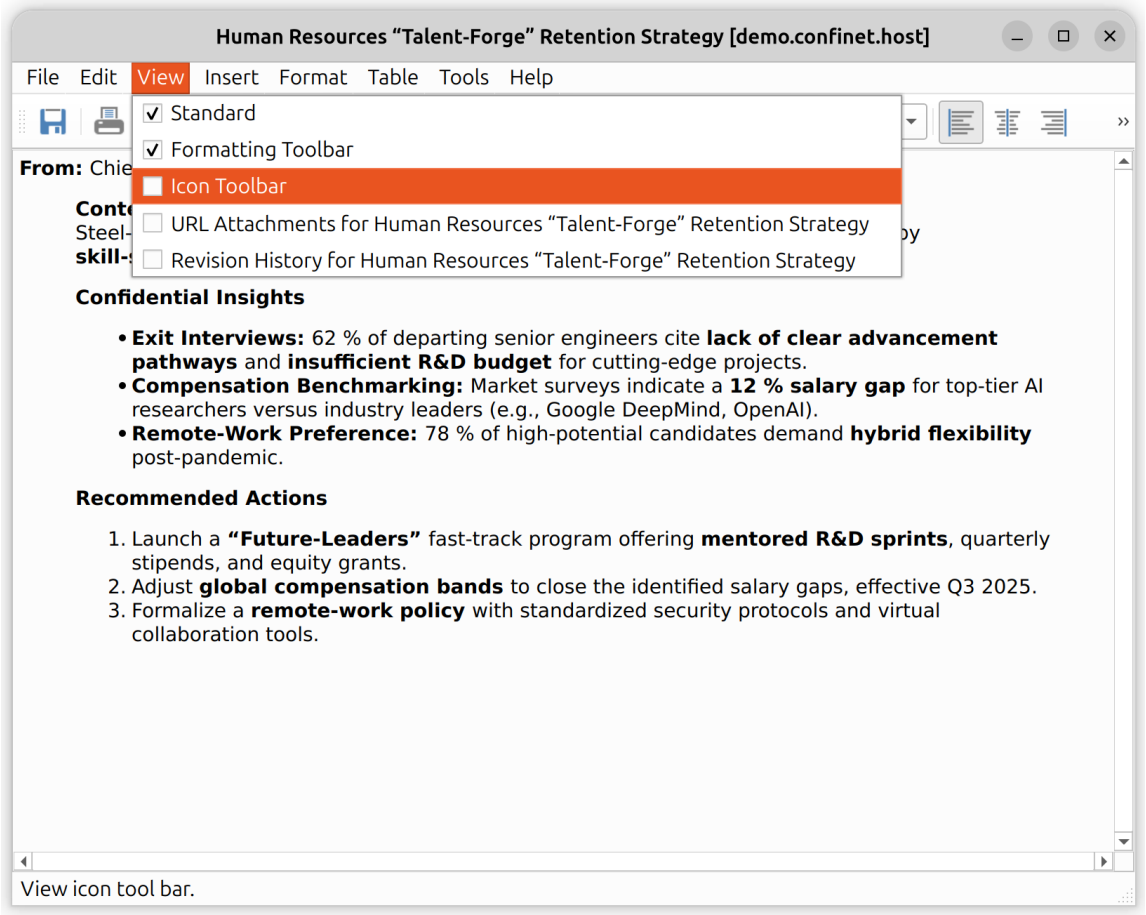


Figure 6.10: Viewing the Icon Toolbar

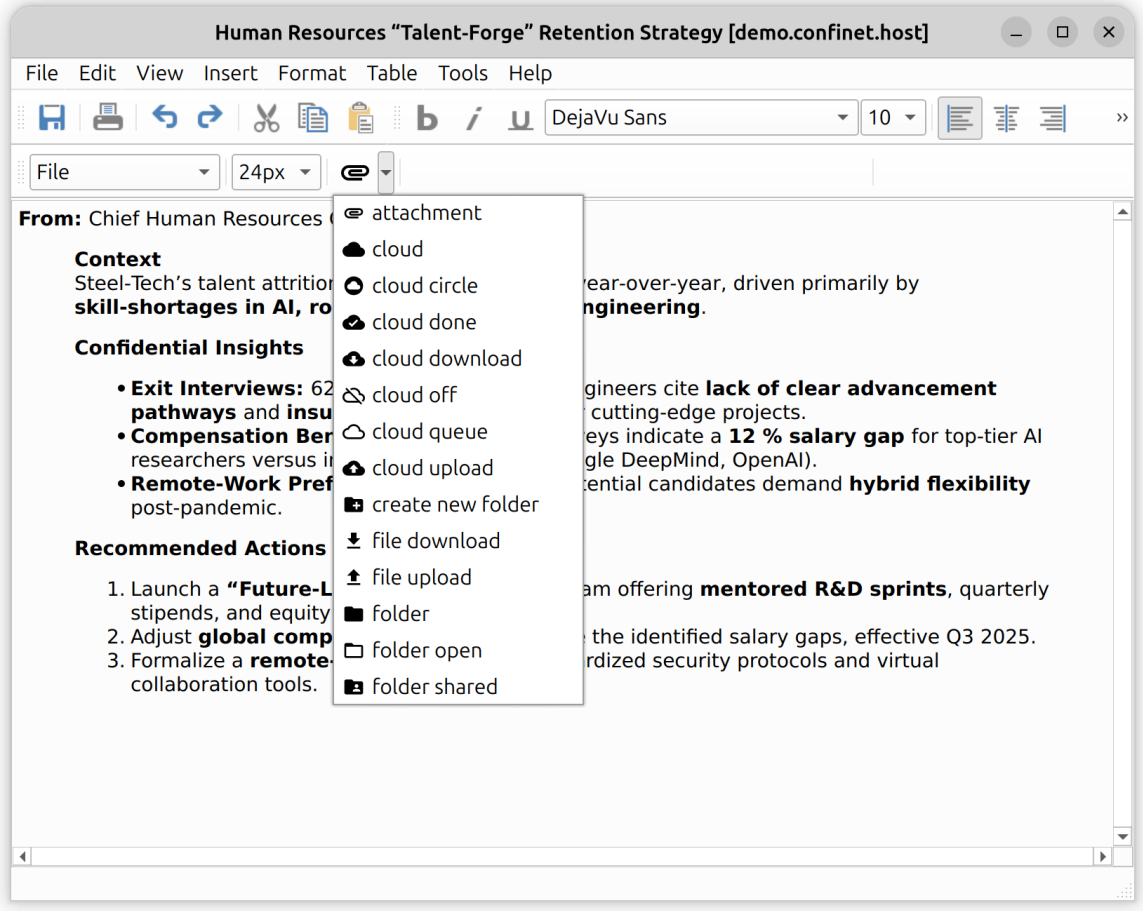


Figure 6.11: Icon Toolbar

To insert an icon:

(See Figures 6.10, 6.11)

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.

6.4.12 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**.

6.4.13 Formatting lists

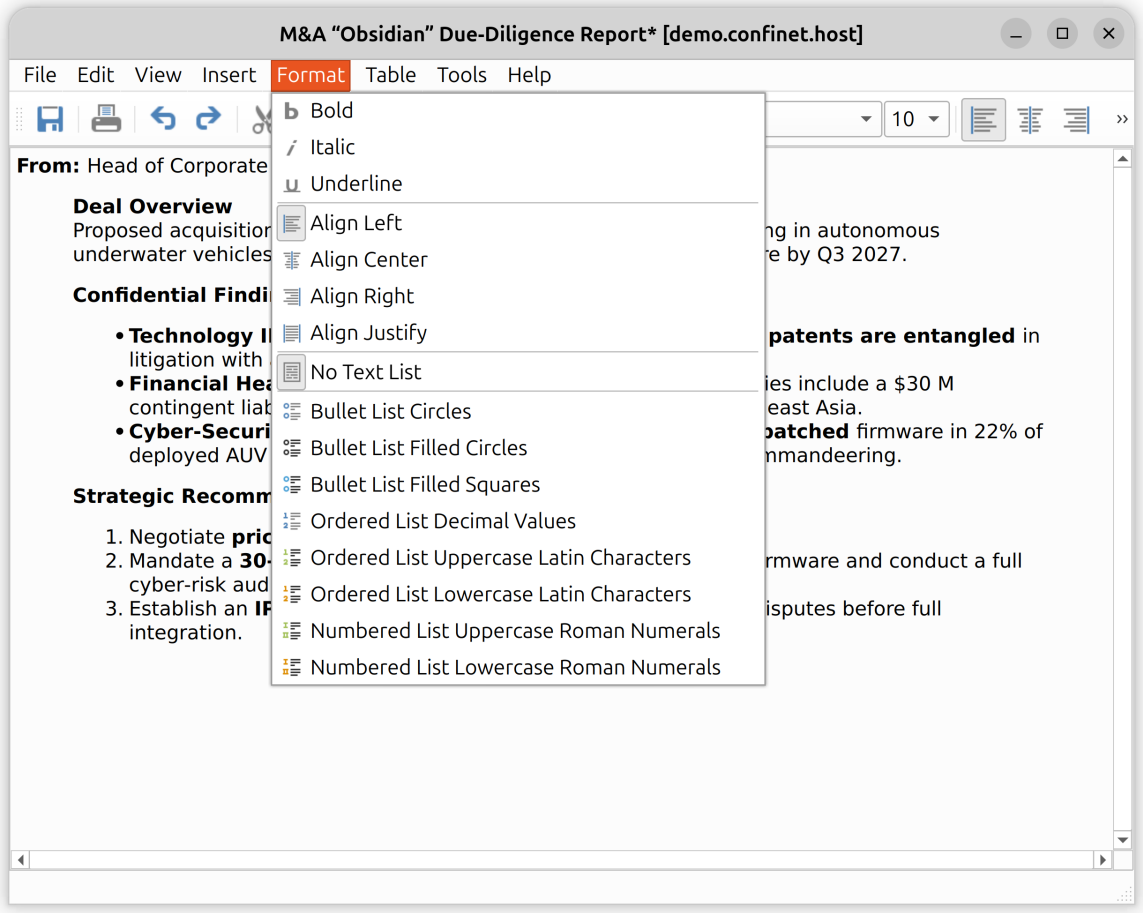


Figure 6.12: Document Editor window **Format** menu

From the **Format** menu, you can format text as one of the following lists: *(See Figure 6.12)*

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**.

6.4.14 Formatting tables

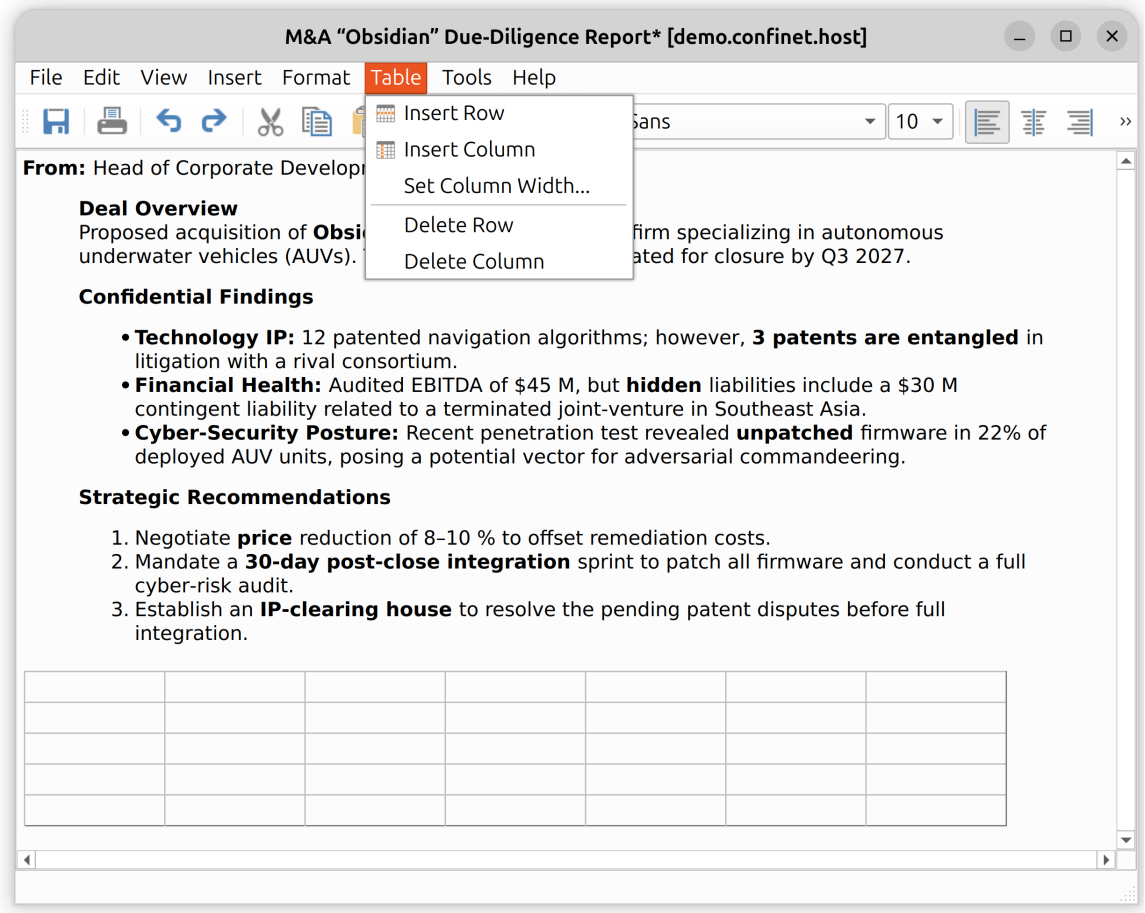


Figure 6.13: Document Editor window **Table** menu

The Document Editor window **Table** menu allows you to perform the following operations: *(See Figure 6.13)*

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

6.4.15 Finding text

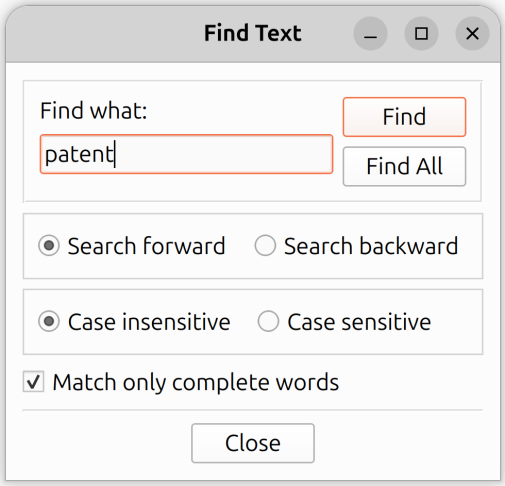


Figure 6.14: Find Text dialog

To search for text in a document: *(See Figure 6.14)*

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**.

6.4.16 Replacing text

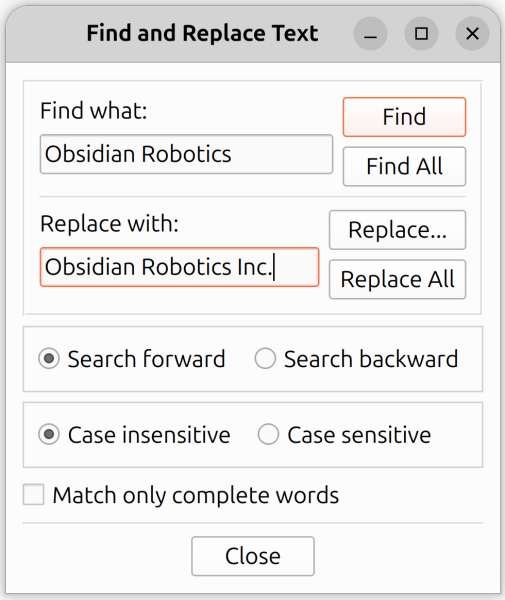


Figure 6.15: Find and Replace Text dialog

(See Figure 6.15) 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**.

6.5 Document spelling

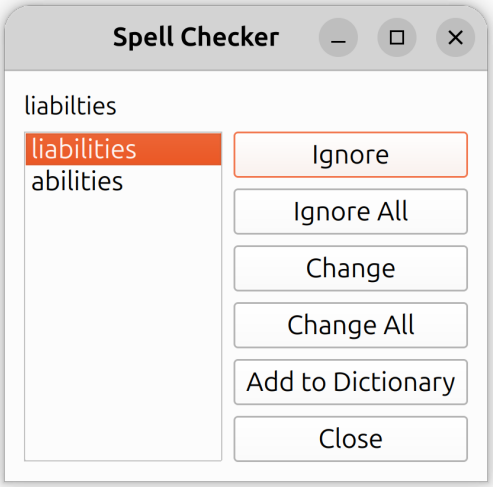


Figure 6.16: Spell Checker dialog

To check and correct spelling errors in a document: *(See Figure 6.16)*

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**.

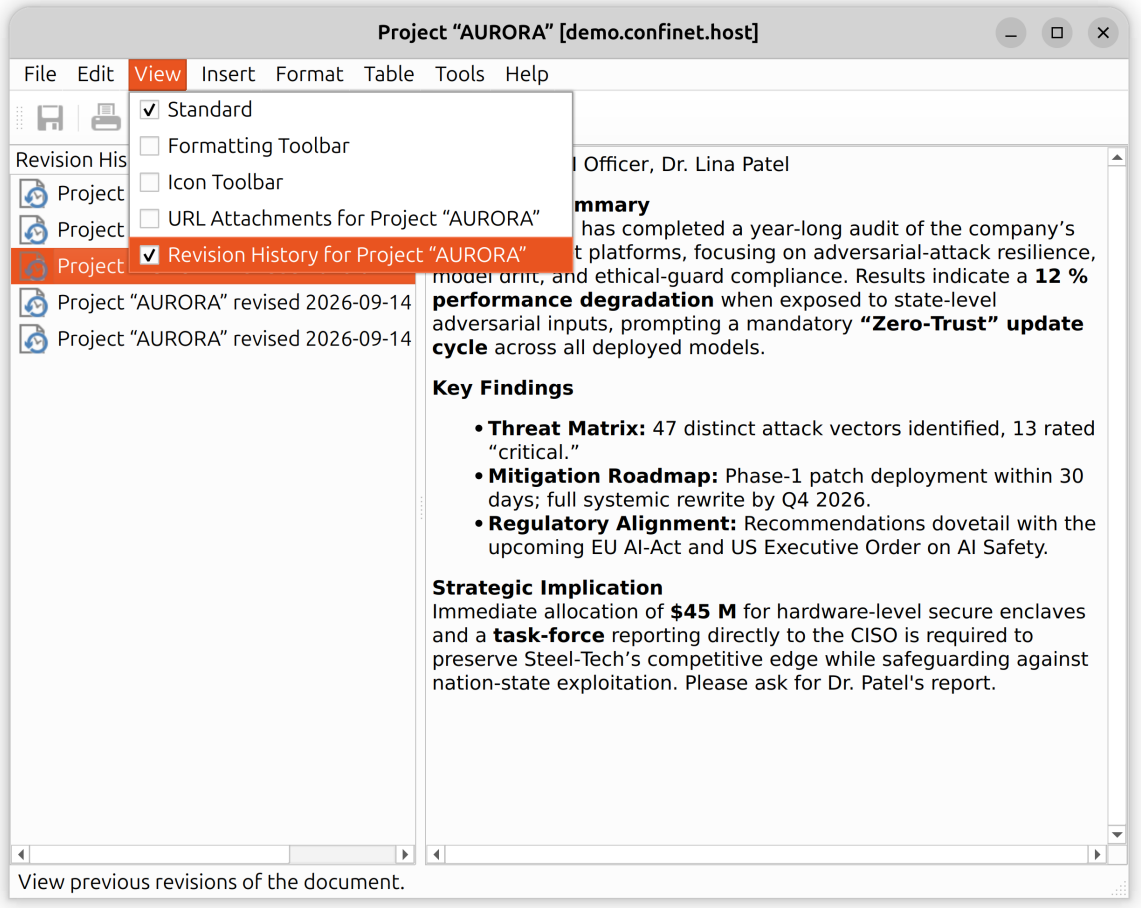


Figure 6.17: Viewing document revisions

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**.

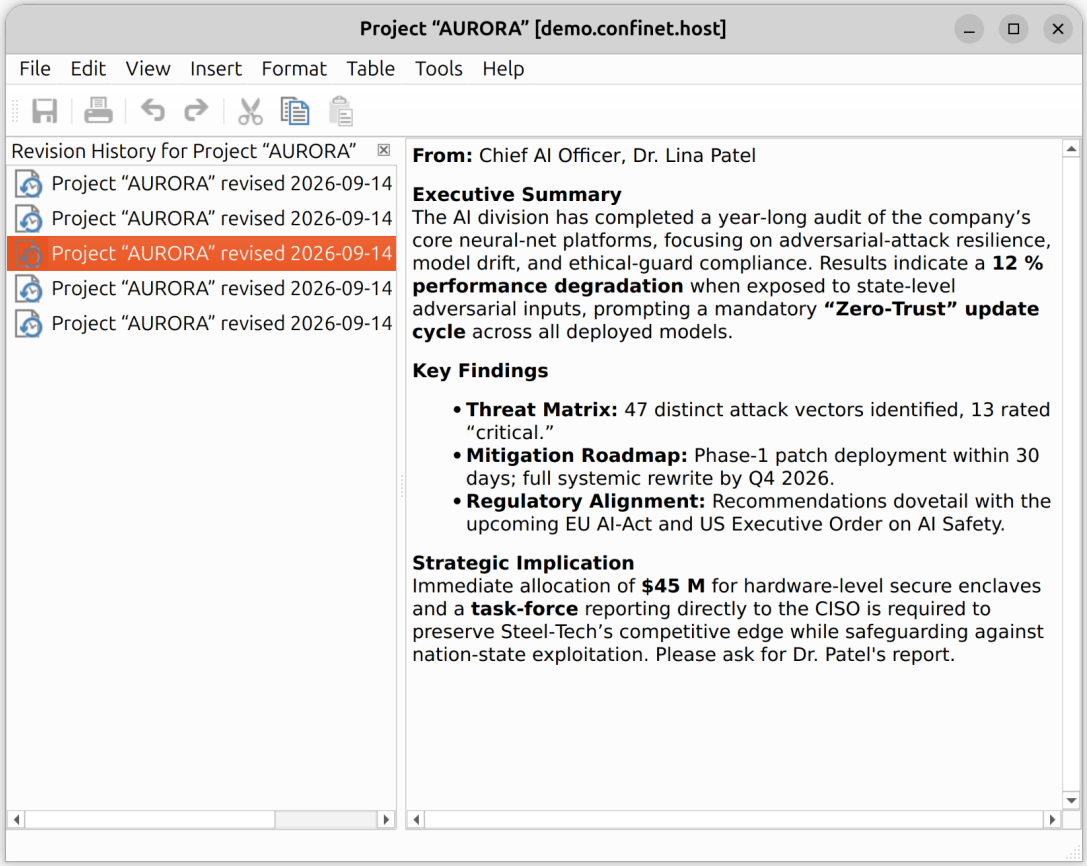


Figure 6.18: Revision History

6.6 Document revisions

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

(See Figures 6.17, 6.18)

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.

6.7 Printing documents

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

6.7.1 Printing a document

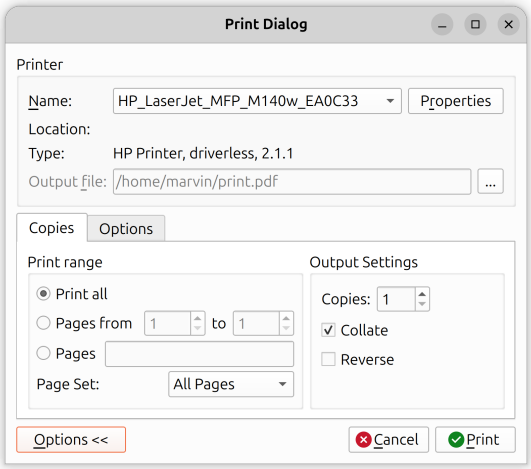


Figure 6.19: Print dialog

(See Figure 6.19)

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**.

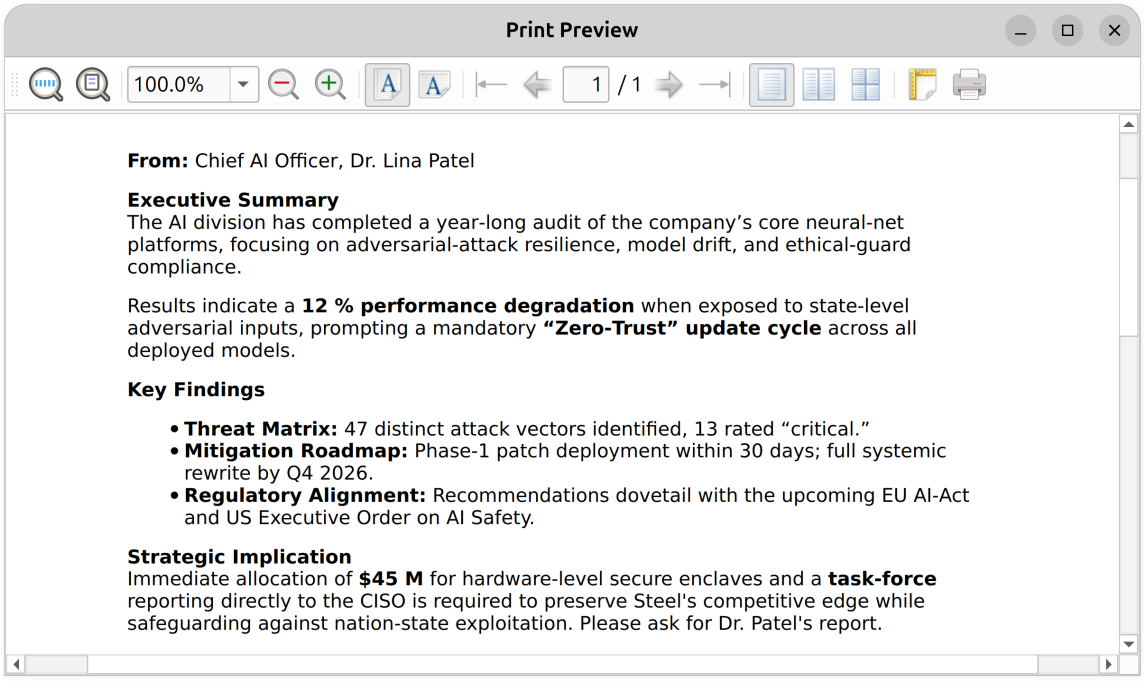


Figure 6.20: Print Preview dialog

6.7.2 Previewing a document

To preview the contents of a document: *(See Figure 6.20)*

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** .

6.8 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.

6.8.1 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**.

6.8.2 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**.

6.9 Restoring documents

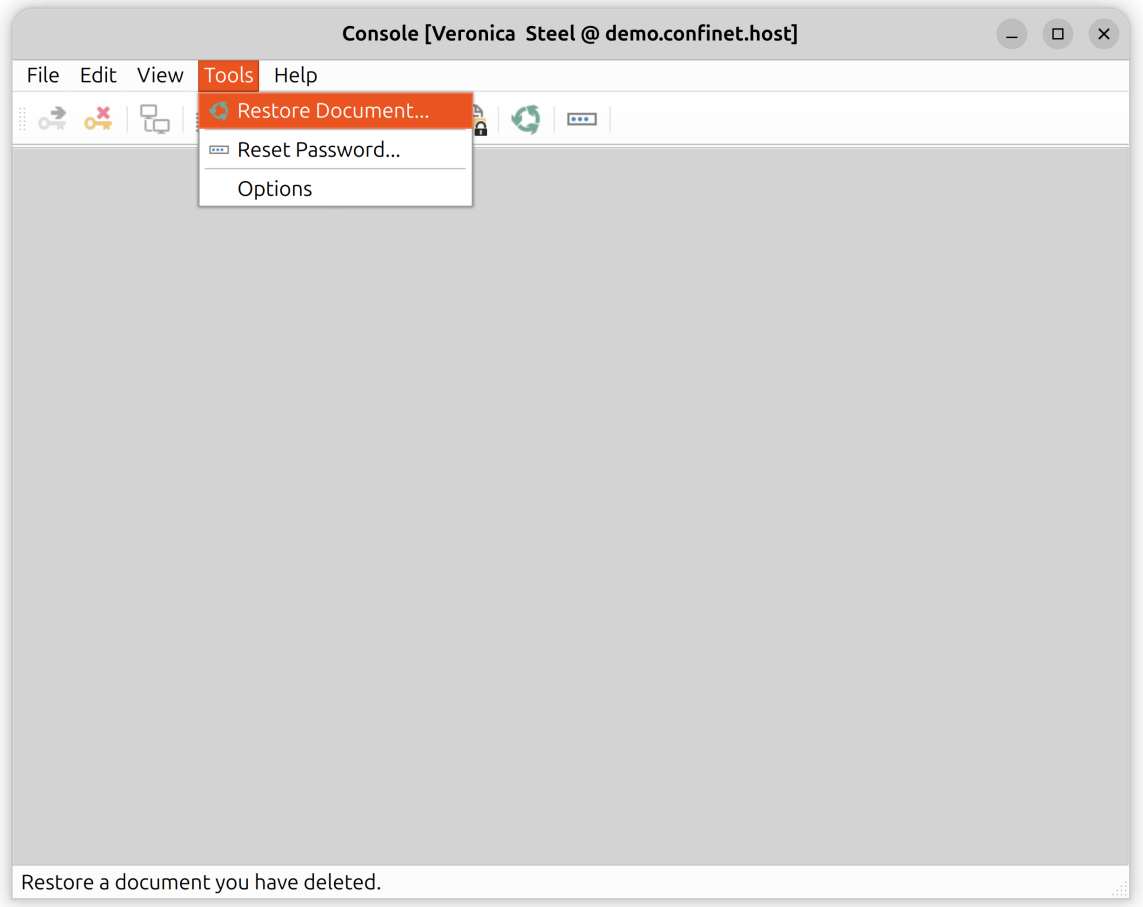


Figure 6.21: Restoring a document

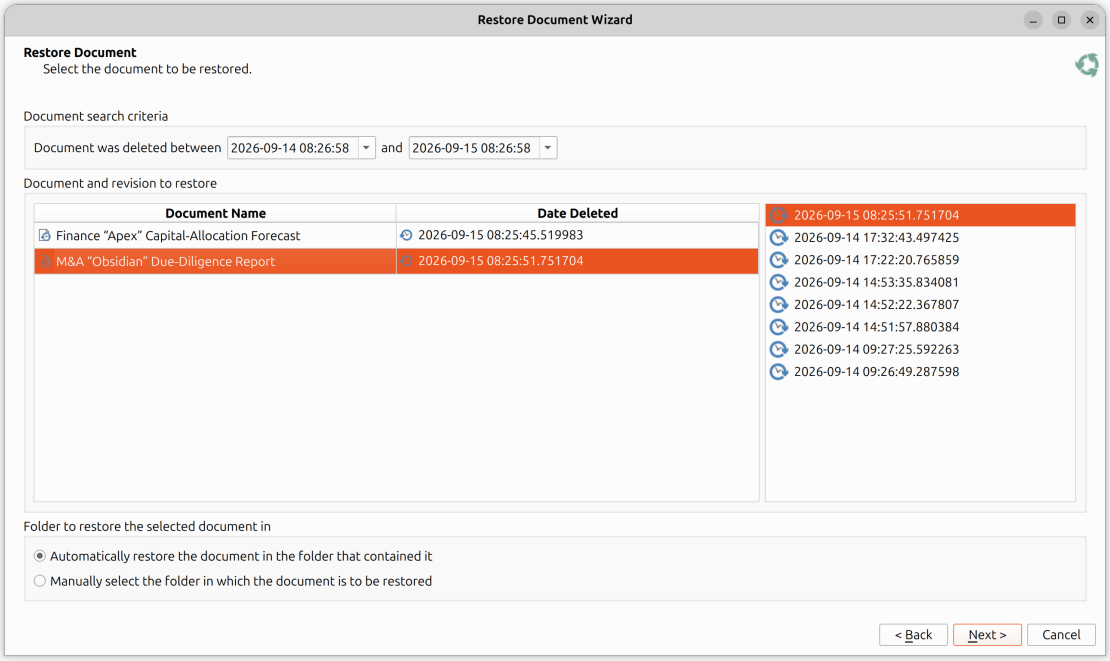


Figure 6.22: Restore Document wizard

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

(See Figures 6.21, 6.22)

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**.

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

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.

6.10 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
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.

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

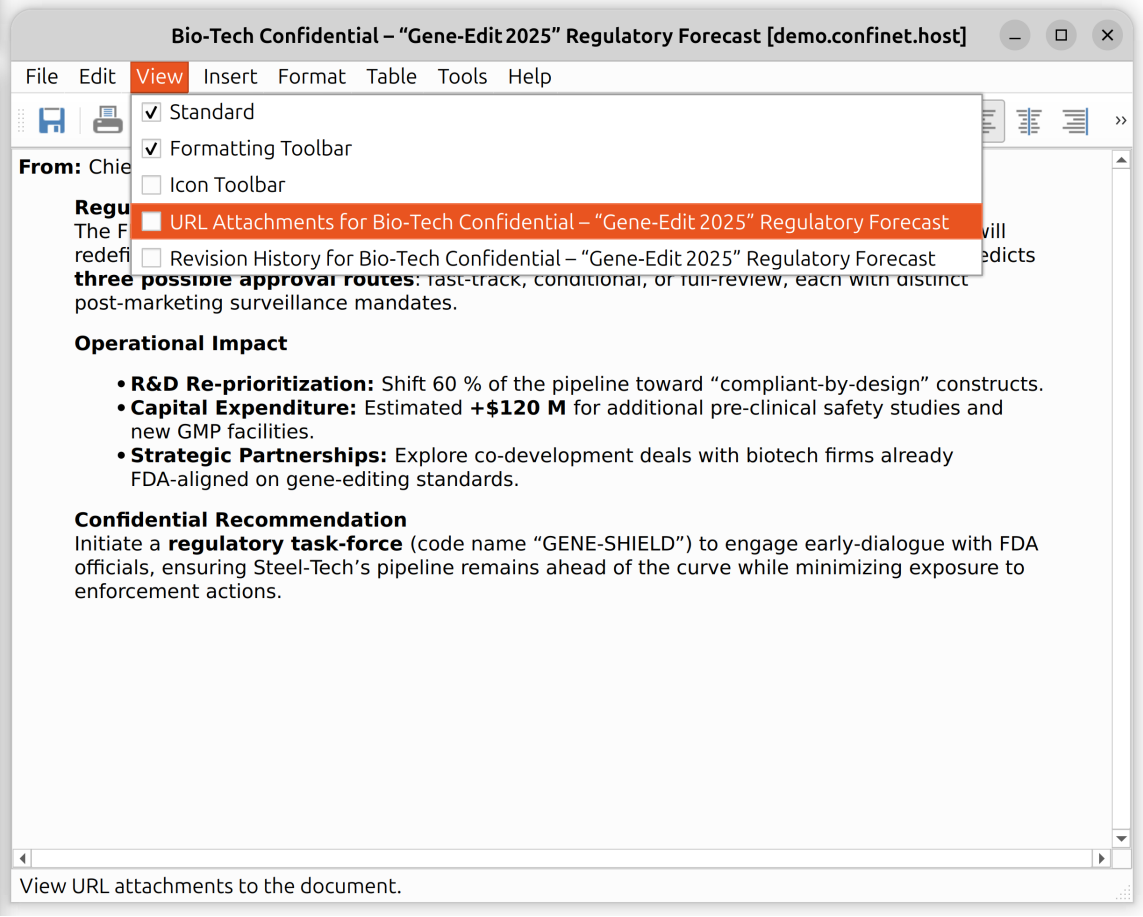


Figure 6.23: Viewing document URL attachments

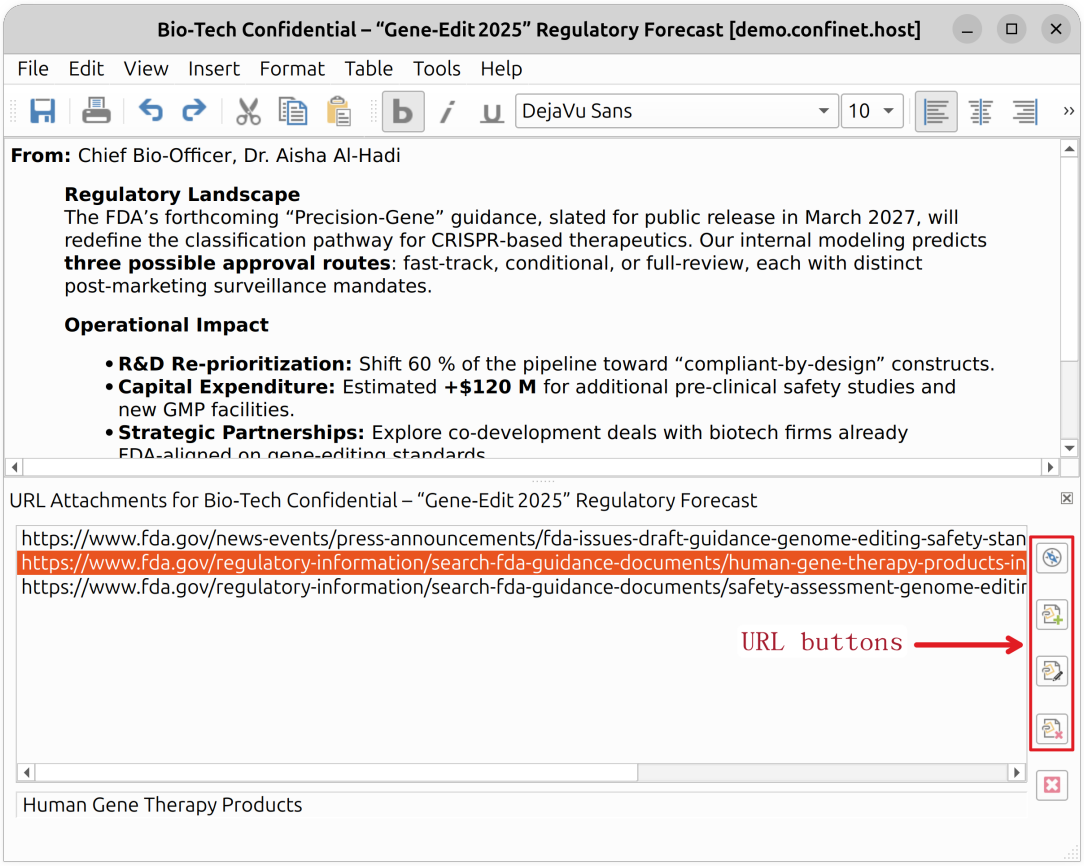


Figure 6.24: Document URL attachments

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. *(See Figures 6.23, 6.24)*

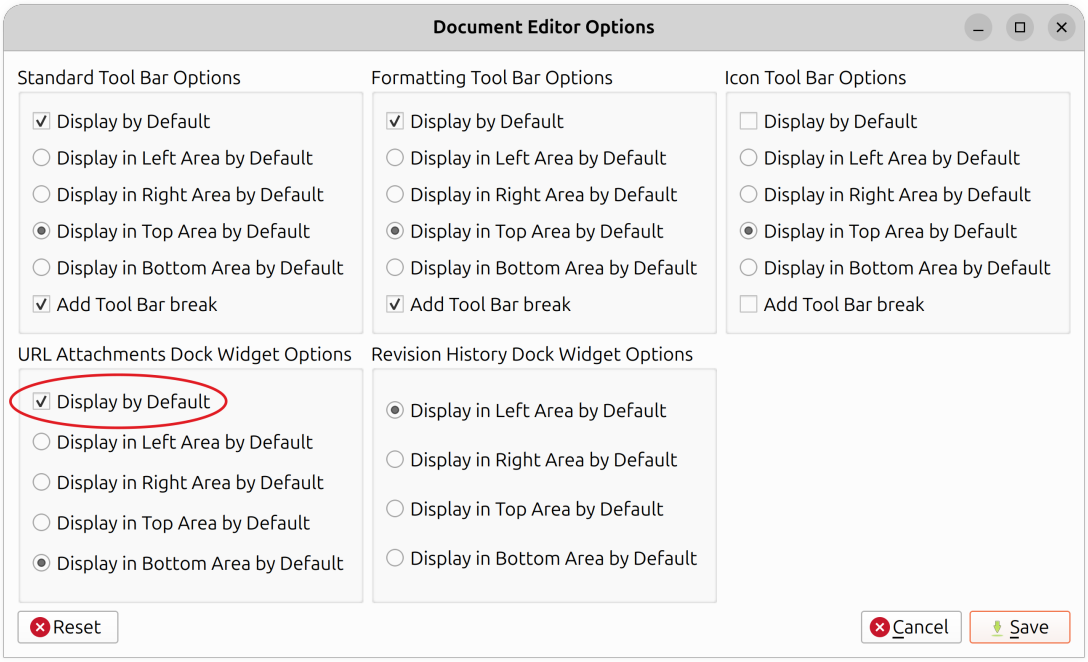


Figure 6.25: URL attachments Dock Widget Options

(See Figure 6.25) 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**.

(See Figure 6.26) 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.

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

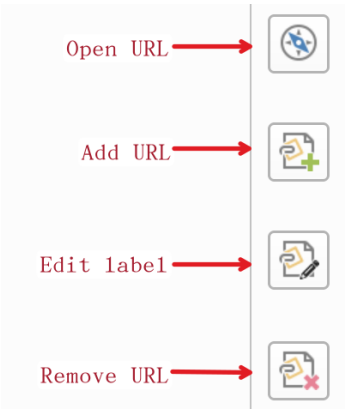


Figure 6.26: URL Attachments for *document name* window buttons

Chapter 7

Sharing Documents

7.1 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]

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

7.1.1 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 *viewed*	lossless
Allow the contents of the document to be *updated*	lossless
Allow the contents of the document to be *copied from the clipboard*	lossless
Allow the contents of the document to be *copied to the clipboard*	**lossy**
Allow the contents of the document to be *exported to a text file*	**lossy**
Allow the contents of the document to be *exported to a PDF file*	**lossy**
Allow the contents of the document to be *printed*	**lossy**
Allow the contents of the document to be *searched*	lossless

Table 7.1: 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]

[2] These 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.

[3] However, 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**

[4] Remember 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]

7.1.2 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 7.2: 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.

[5] This 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 9.

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.

7.2 Viewing document keys created for you

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

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

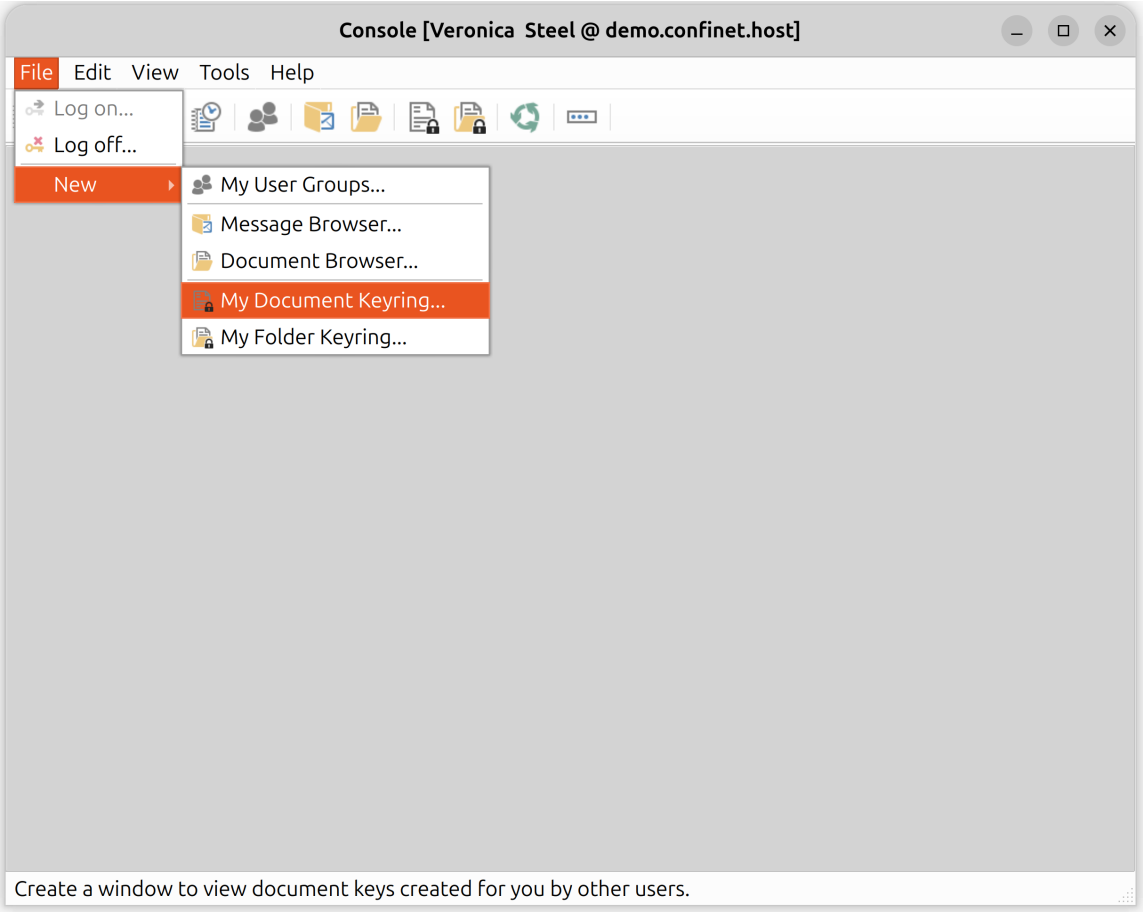


Figure 7.1: Opening My Document Keyring window

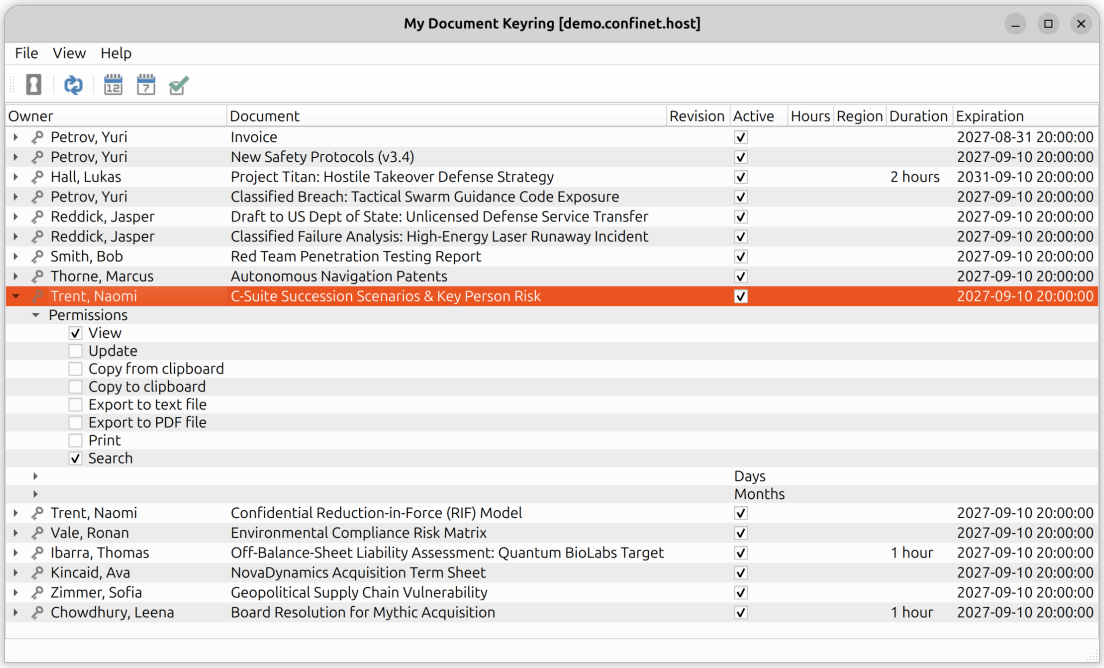


Figure 7.2: My Document Keyring window

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: *(See Figures 7.1, 7.2)*

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.
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.

7.3 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]
8. Selecting the hours of the day during which the document key will be active.[12]

[7] By default, the document key will be associated with the *latest* revision of the document.
[8] By default, the document key will have the *view* and *search* permissions.
[9] By default, the document key will have an *active* status.
[10] By default, the document key will be active on *every month of the year*.
[11] By default, the document key will be active on *every day of the week*.
[12] By default, the document key will be active during *every hour of the day*.

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.

7.3.1 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.

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

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

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

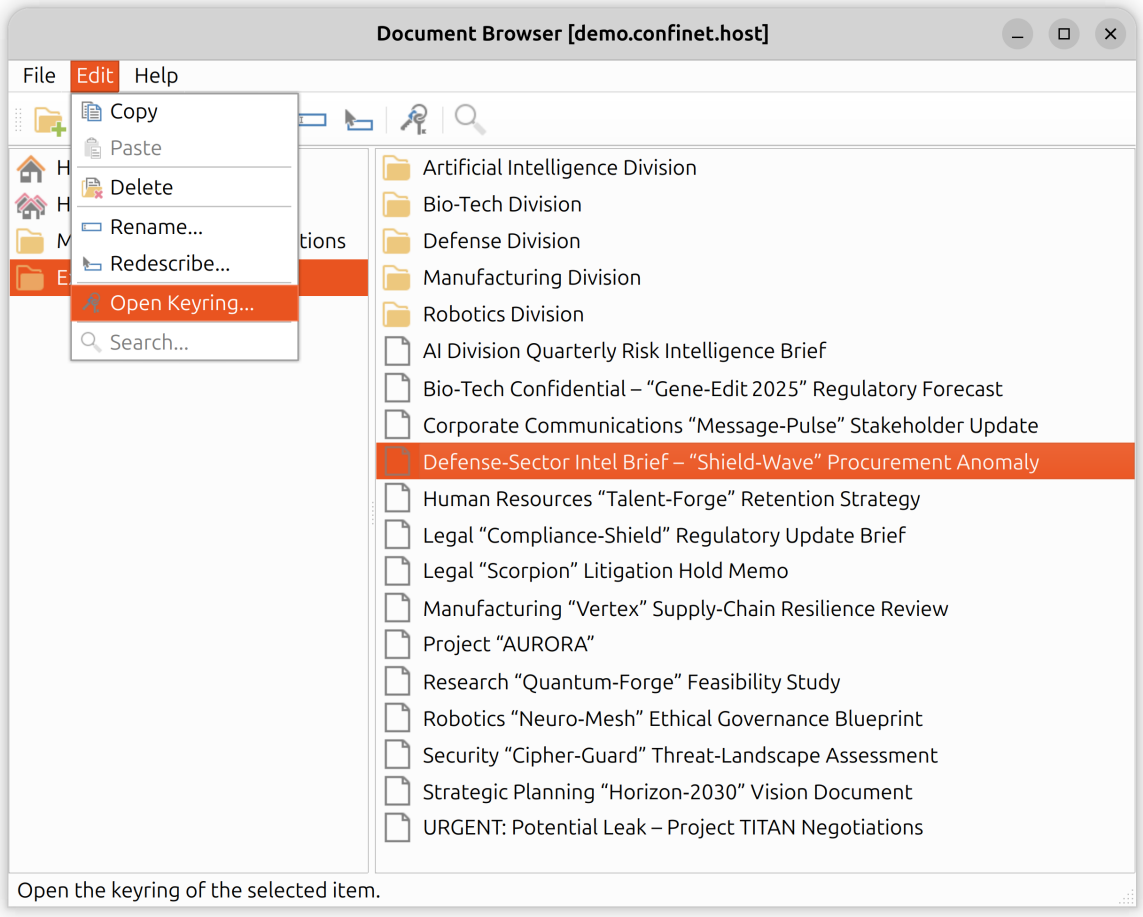


Figure 7.3: Opening a document keyring

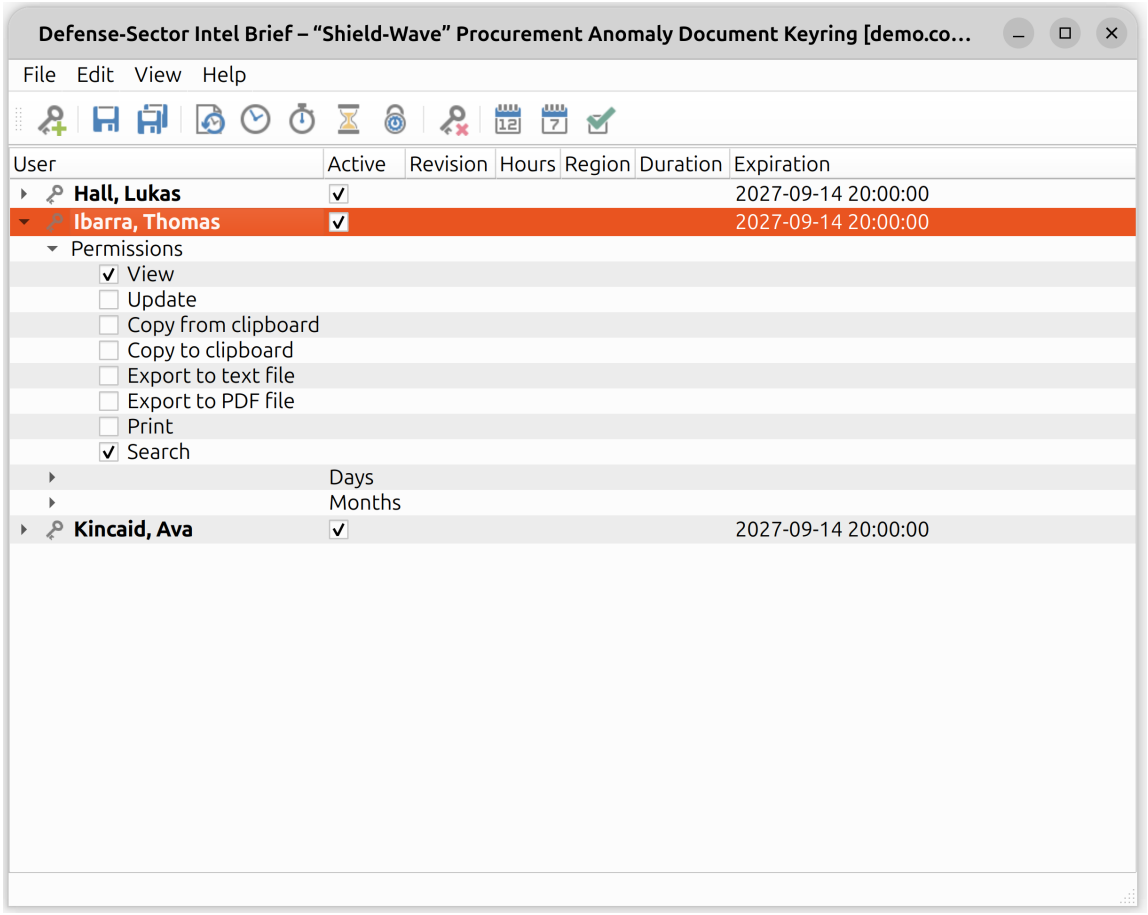


Figure 7.4: Document keys

To open the document keyring associated with a document:

(See Figures 7.3, 7.4)

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

7.3.2 Starting the Create Document Key wizard

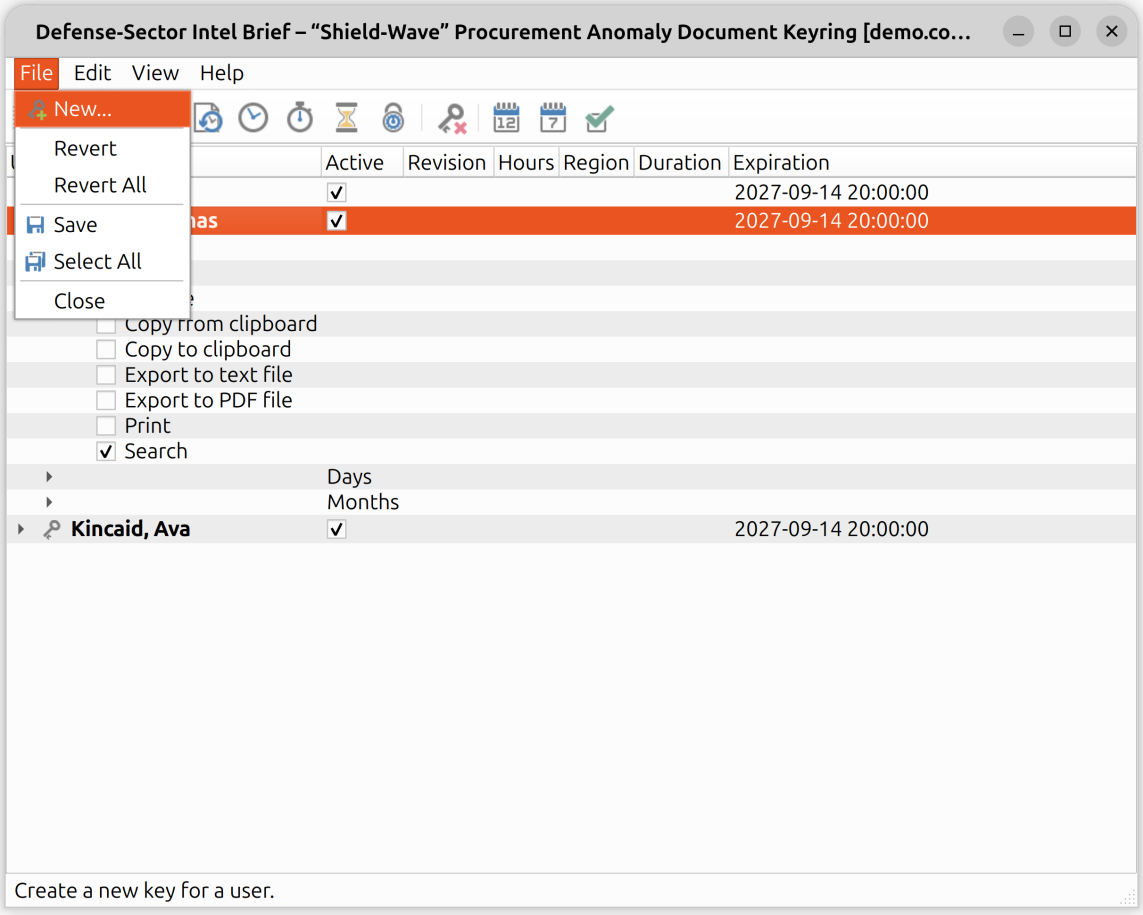


Figure 7.5: Creating a new document key

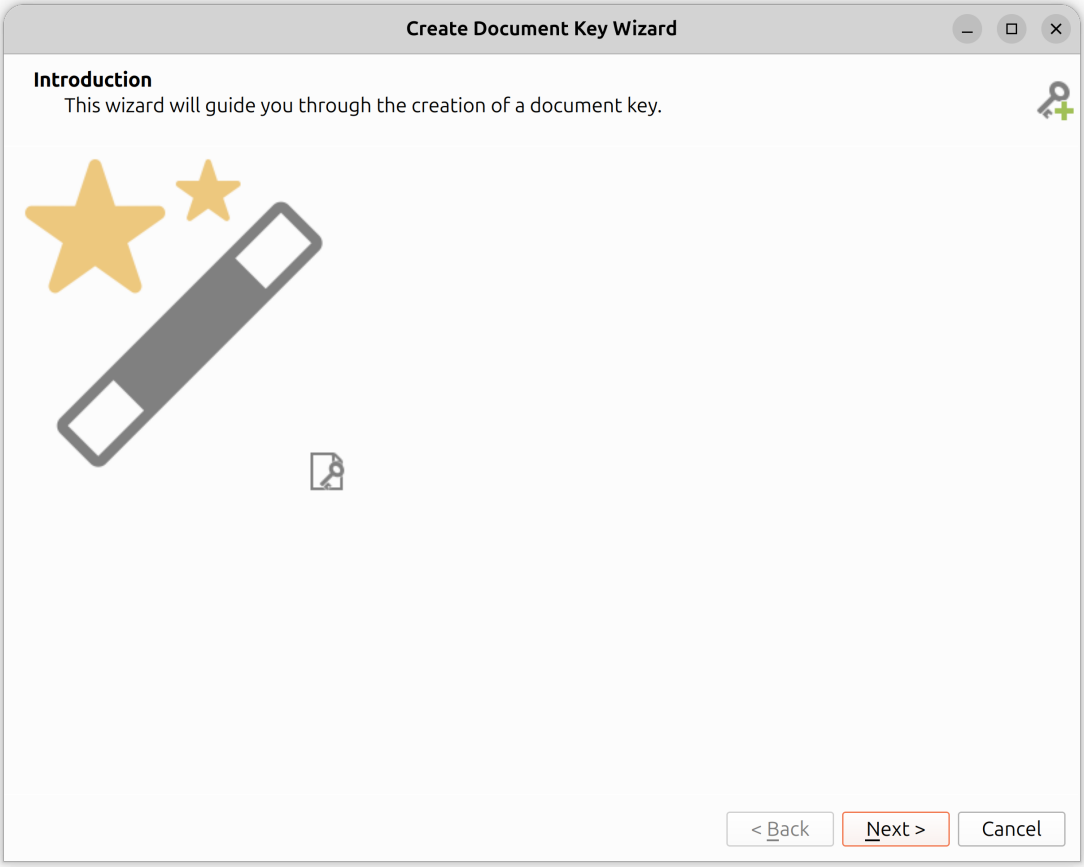


Figure 7.6: Create Document Key wizard

To start the Create Document Key wizard: *(See Figures 7.5, 7.6)*

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

   ↪ The system displays the Create Document Key wizard

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

7.3.3 Document key document revision

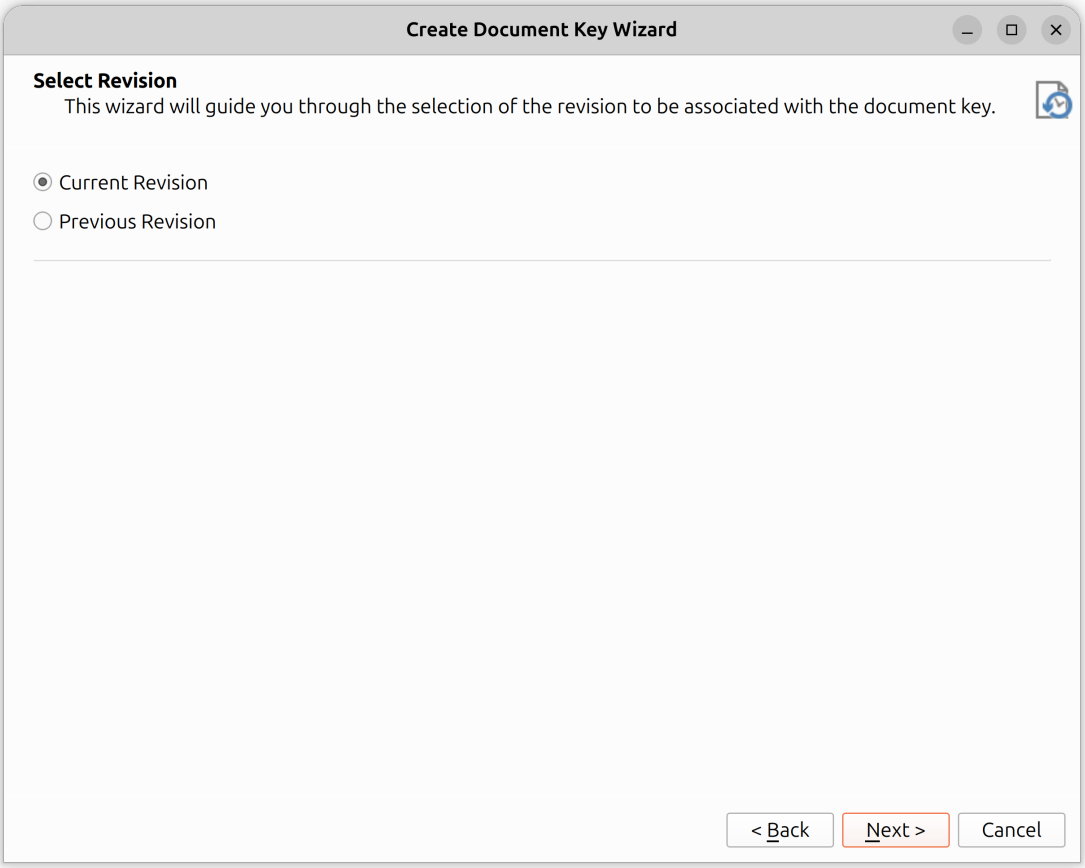


Figure 7.7: Selecting the document revision associated with the document key

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**.

(See Figure 7.7)

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**.

7.3.4 Document key permissions

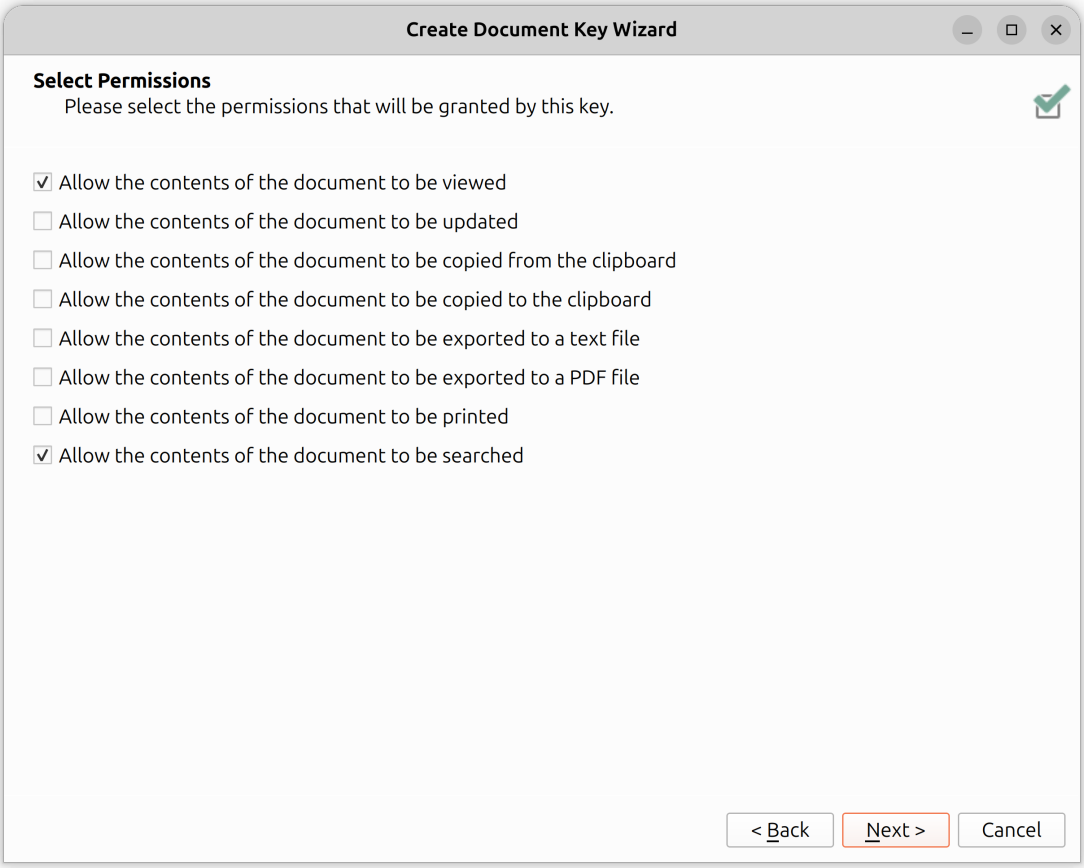


Figure 7.8: Selecting the permissions of a document key

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

(See Figure 7.8)

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**.

7.3.5 Document key active status

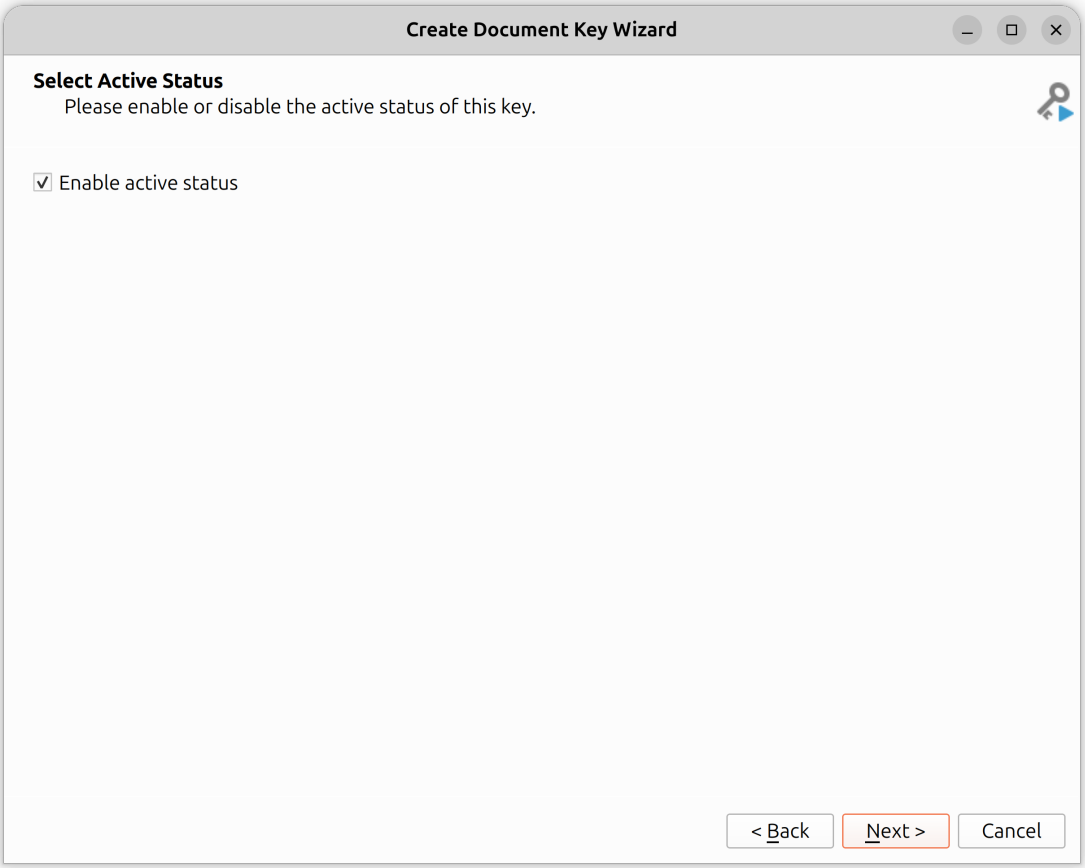


Figure 7.9: Selecting the active status of a document key

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

(See Figure 7.9)

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**.

7.3.6 Document key active months

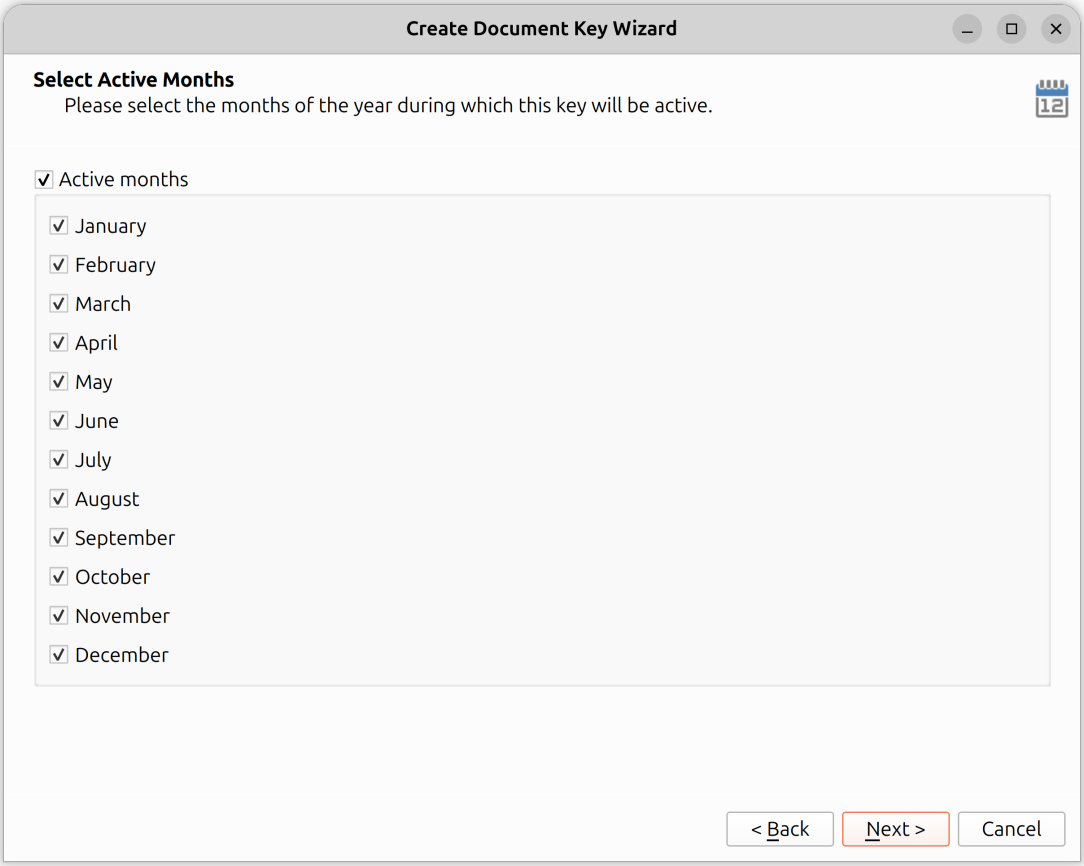


Figure 7.10: Selecting the active months of a document key

(See Figure 7.10)

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**.

7.3.7 Document key active days

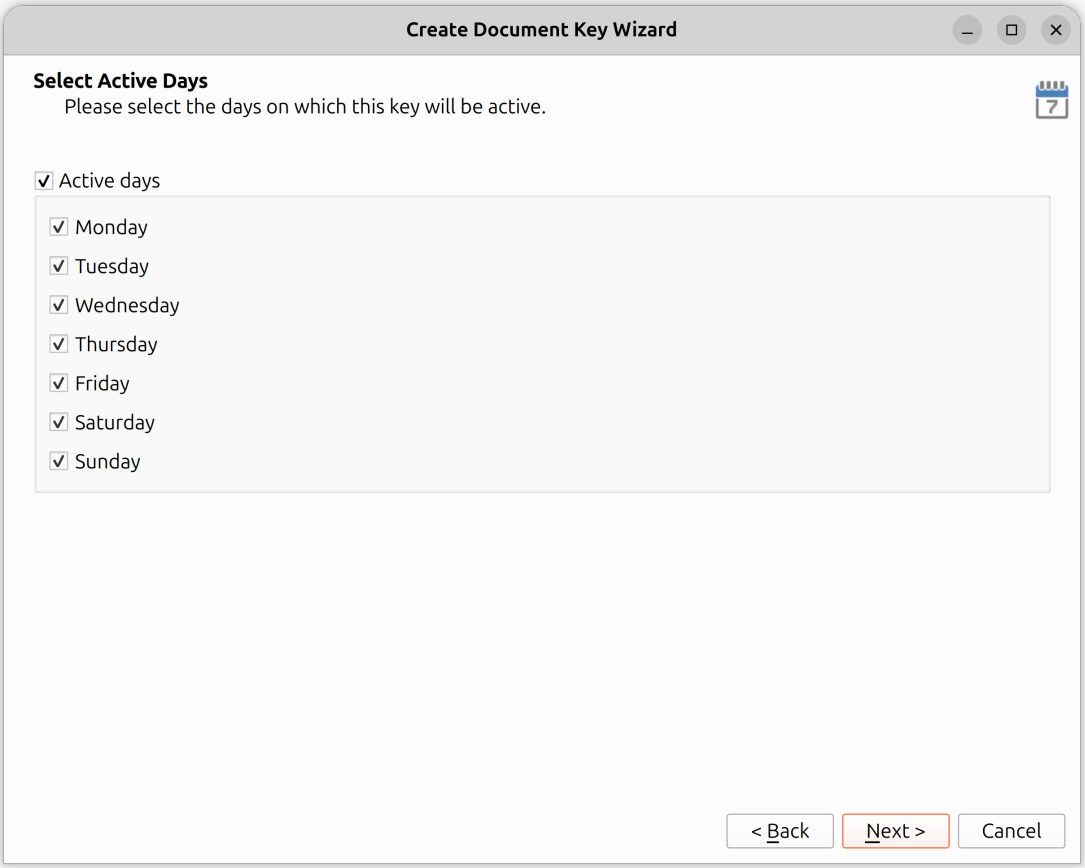


Figure 7.11: Selecting the active days of a document key

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.

(See Figure 7.11)

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

7.3.8 Document key active hours

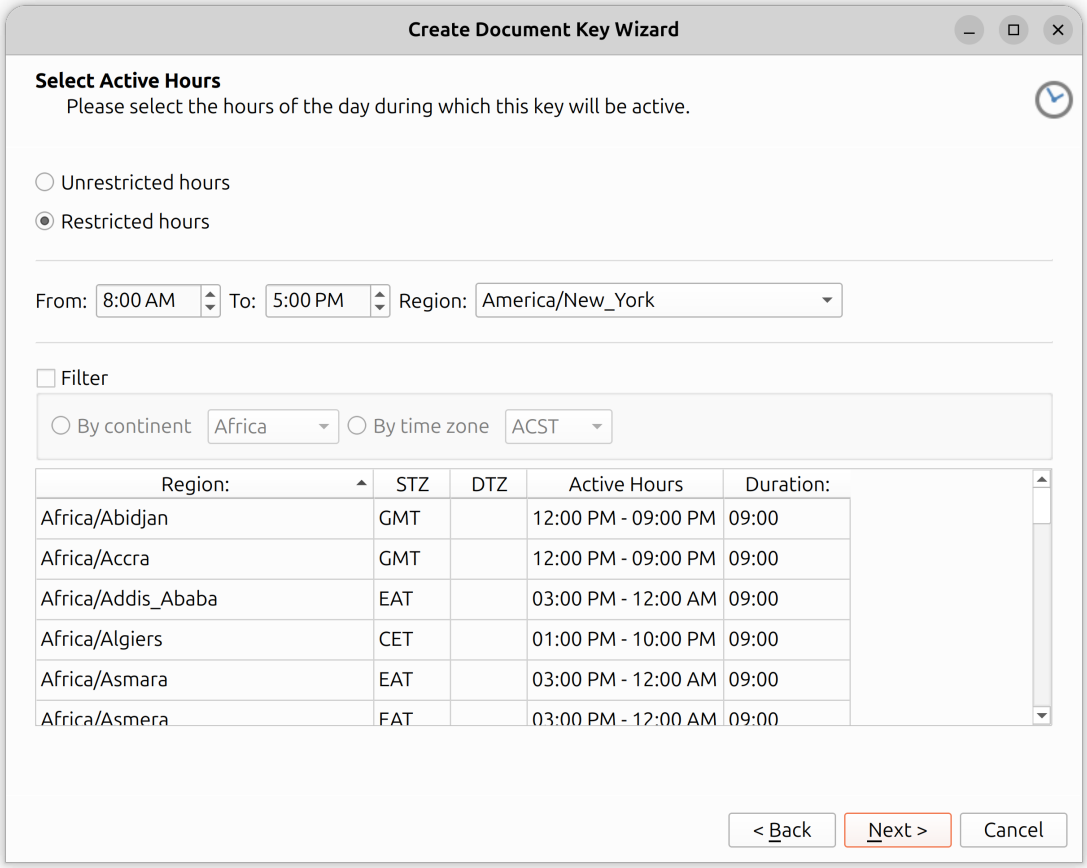


Figure 7.12: Selecting the active hours of a document key

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.

(See Figure 7.12)

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

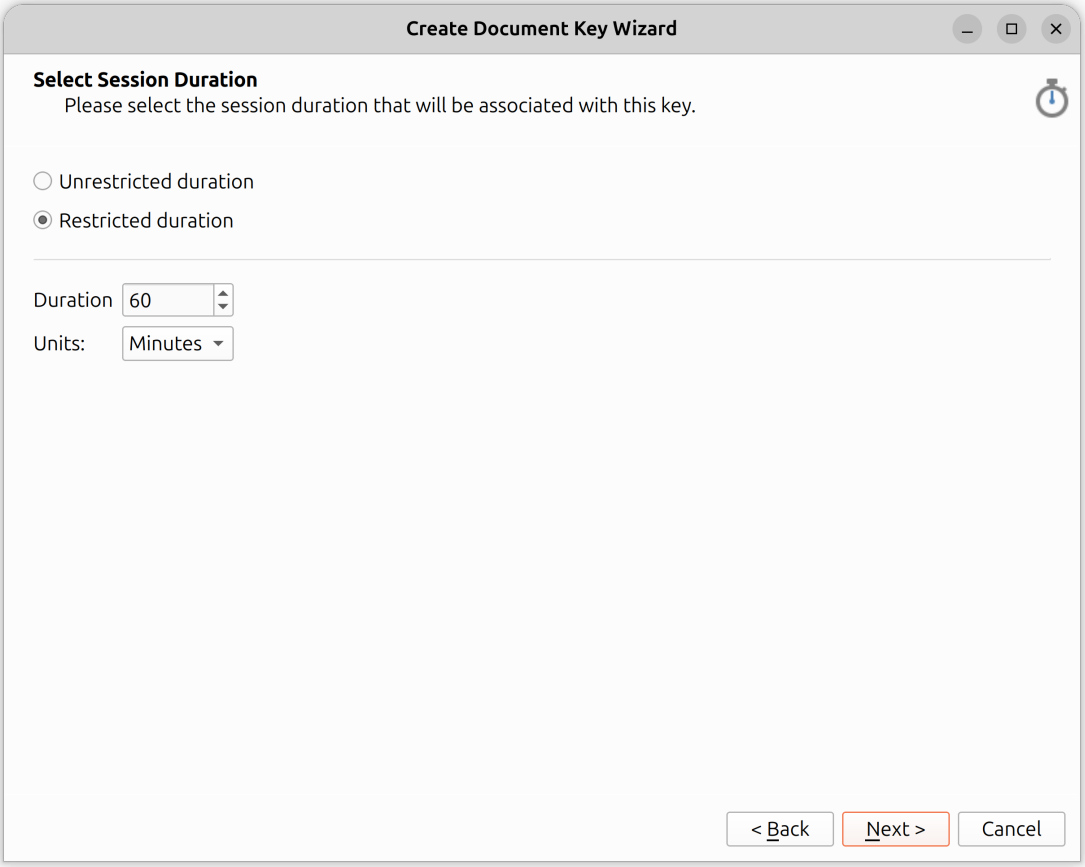


Figure 7.13: Selecting the session duration of a document key

7.3.9 Document key session duration

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

(See Figure 7.13)

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**.

7.3.10 Document key expiration date

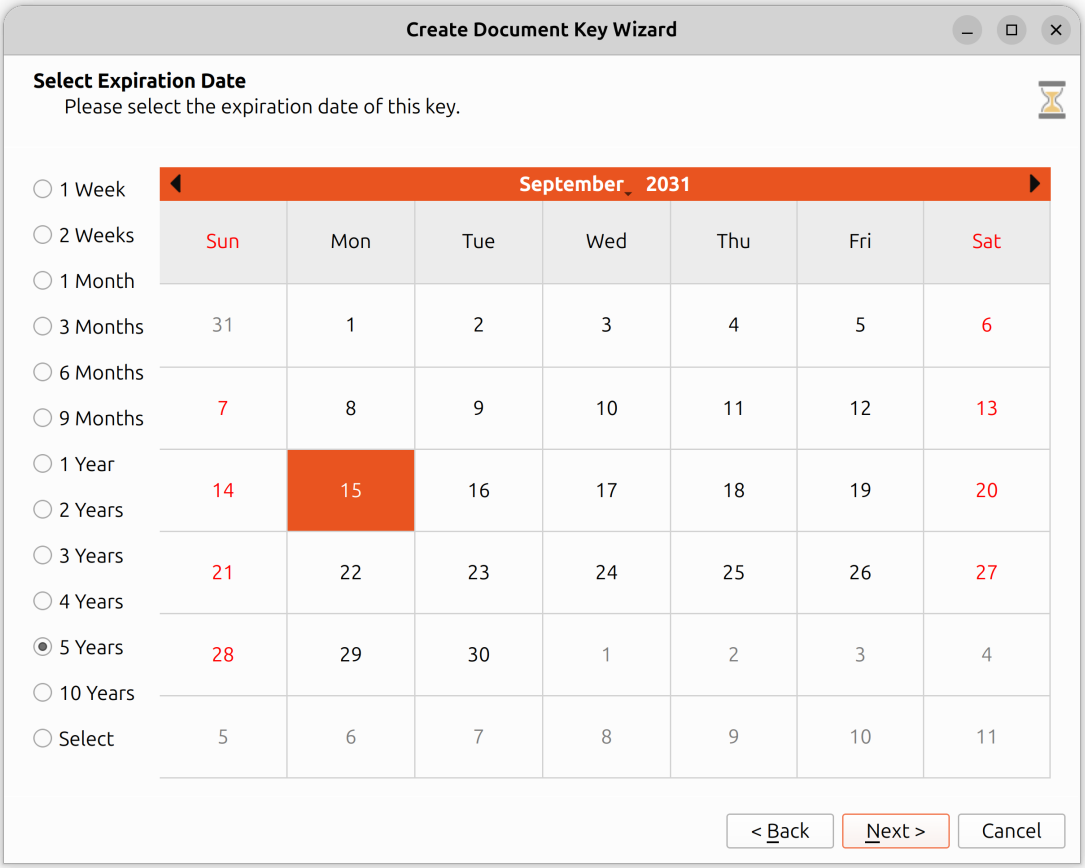


Figure 7.14: Selecting the expiration date of a document key

(See Figure 7.14)

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**.

7.3.11 Document key passcode

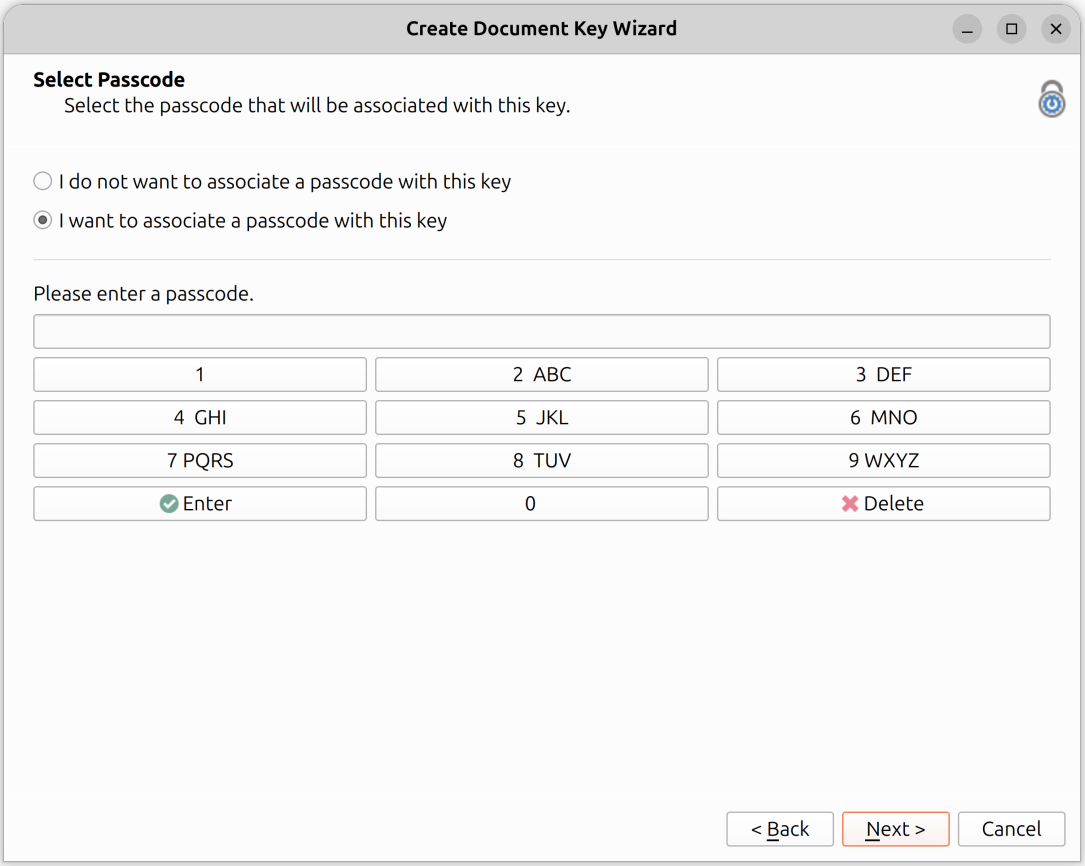


Figure 7.15: Selecting a passcode for a document key

This page of the Create Document Key wizard allows you to specify a passcode[16] for the document key.

(See Figure 7.15)

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.

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

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

7.3.12 Document key users

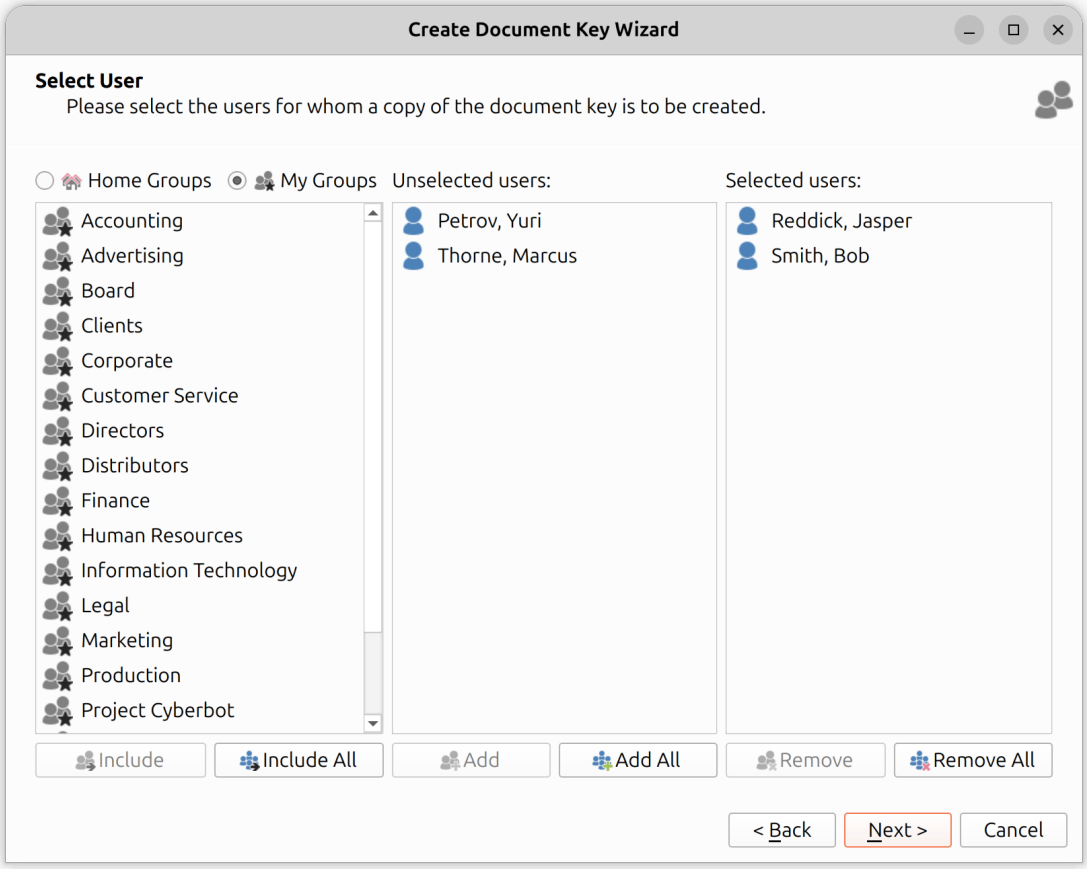


Figure 7.16: Selecting users

(See Figure 7.16)

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**.

7.3.13 Document key confirmation

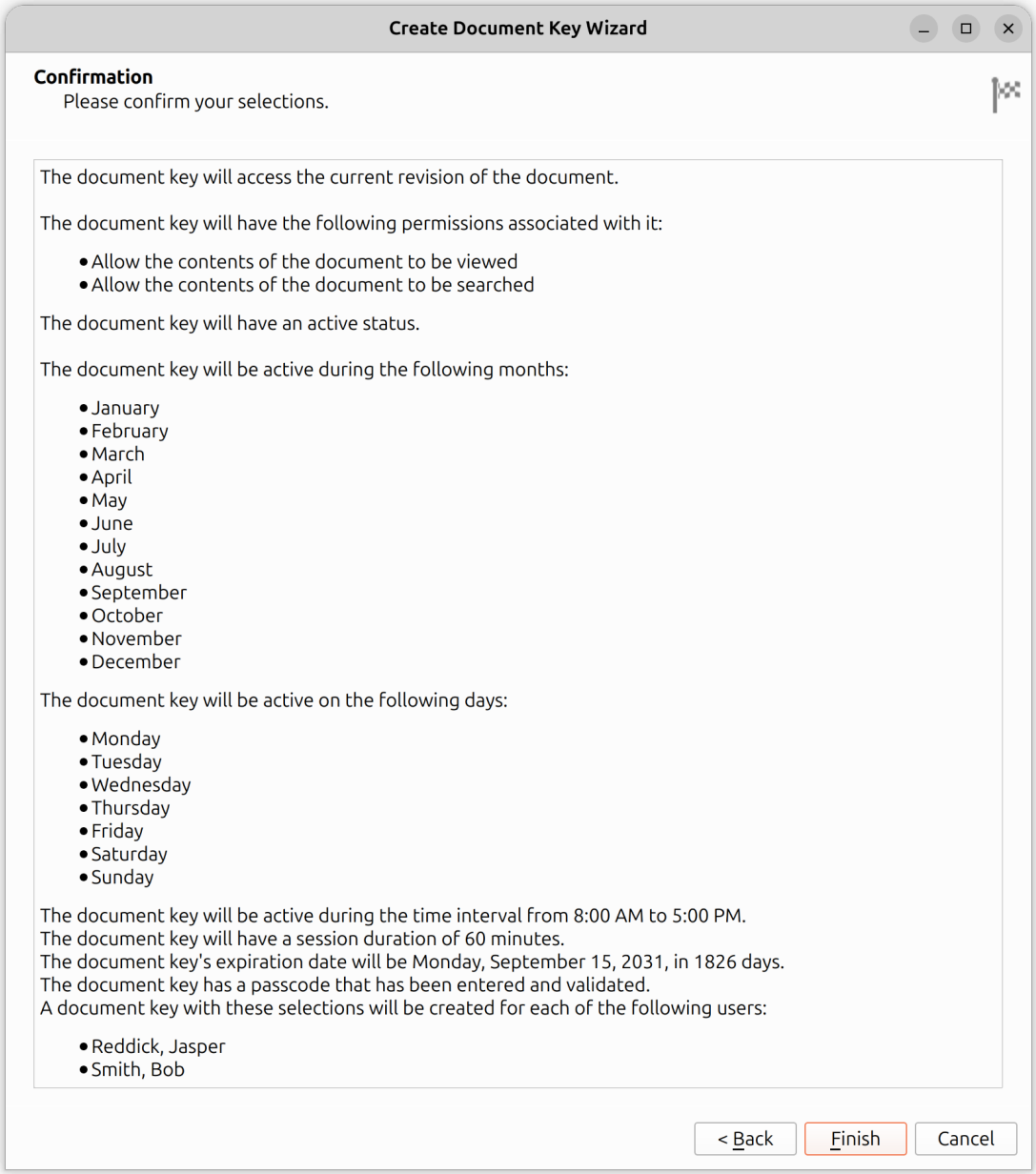


Figure 7.17: Confirming the creation of the document key

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

(See Figure 7.17)

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.

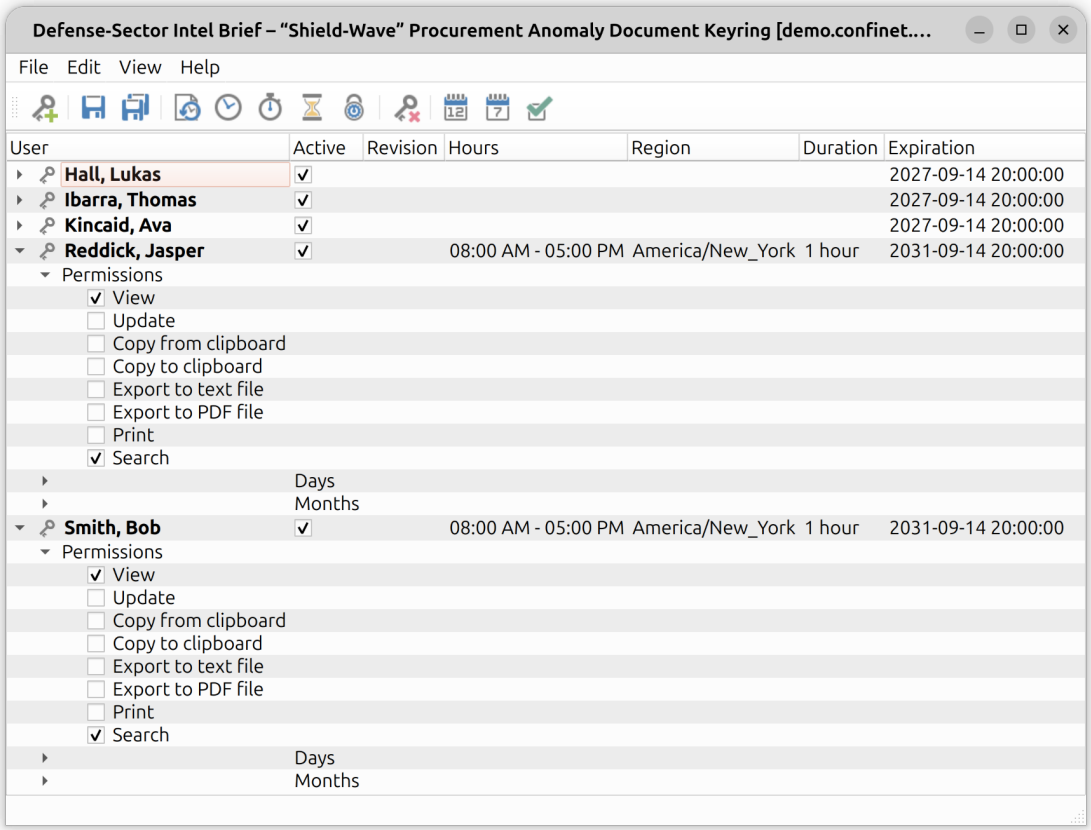


Figure 7.18: New document keys displayed

7.4 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
- 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

7.4.1 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.

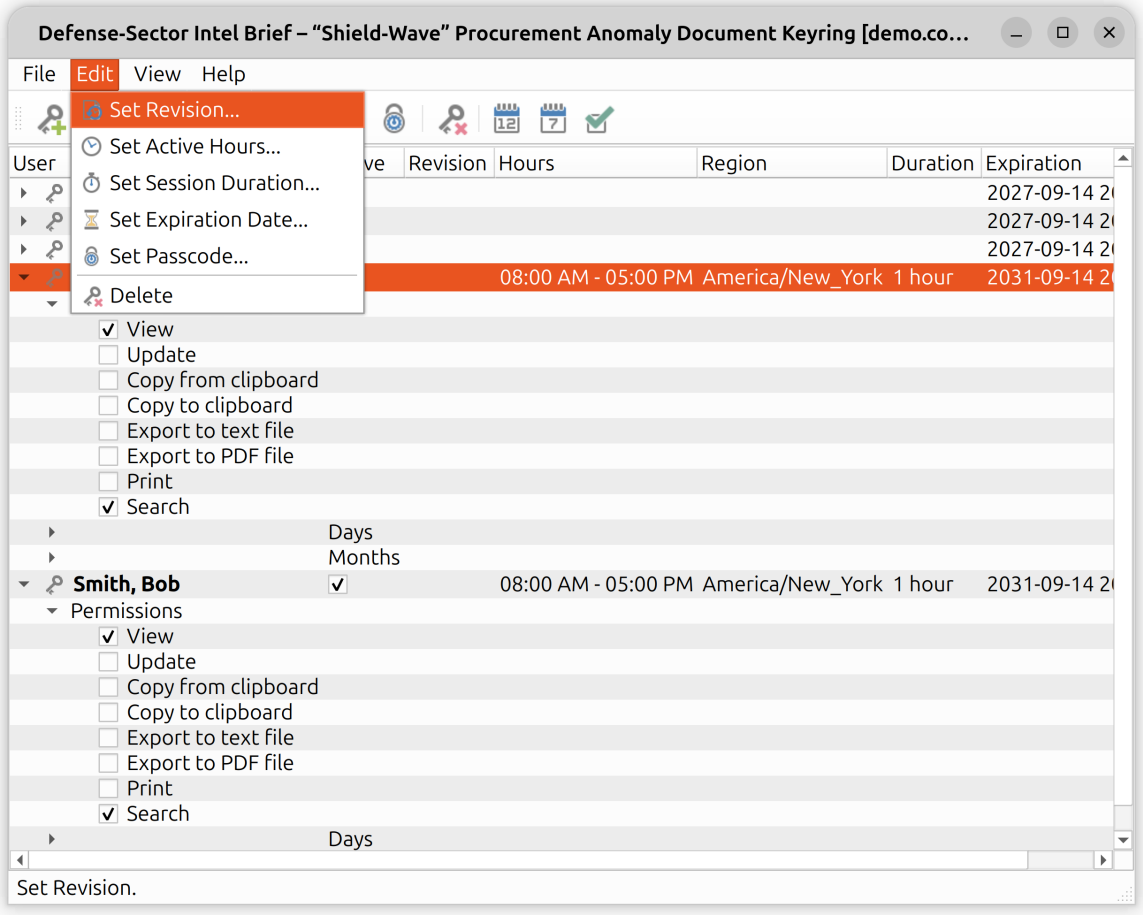


Figure 7.19: Editing the document revision associated with a document key

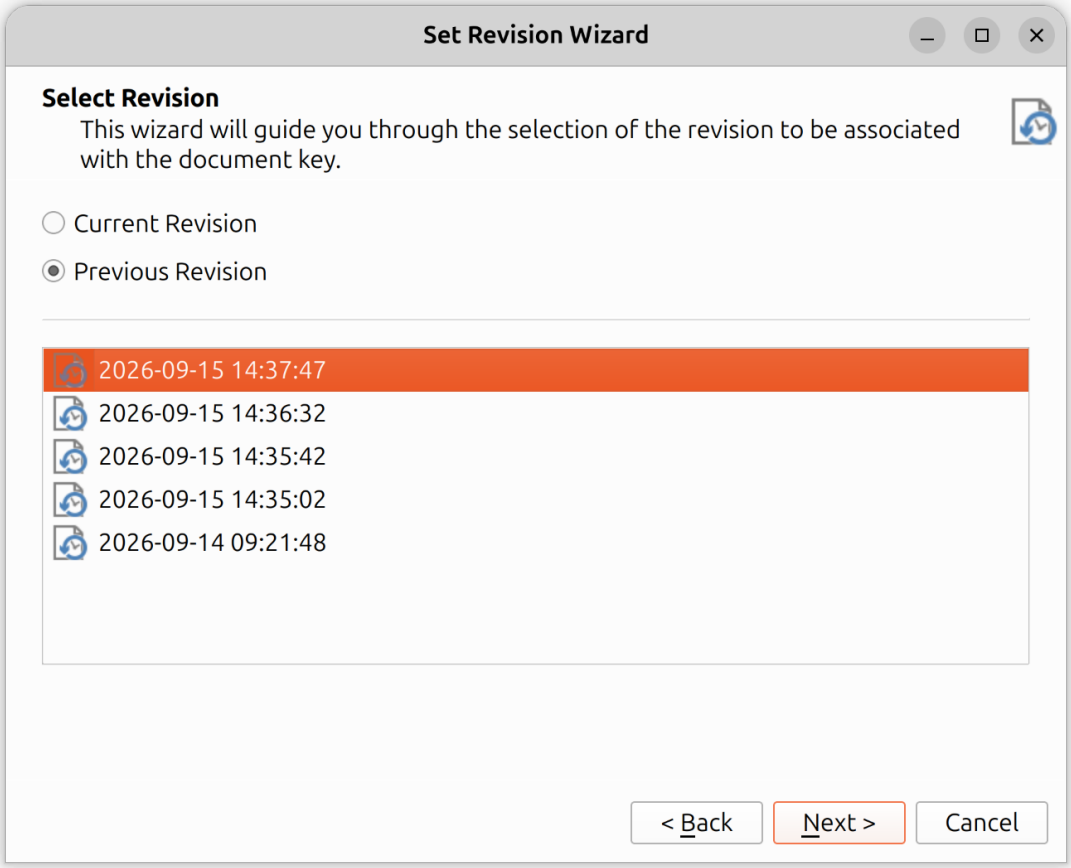


Figure 7.20: Updating the document revision of a document key

To update the document revision associated with a document key: *(See Figures 7.19, 7.20)*

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**.

7.4.2 Updating the permissions of a document key

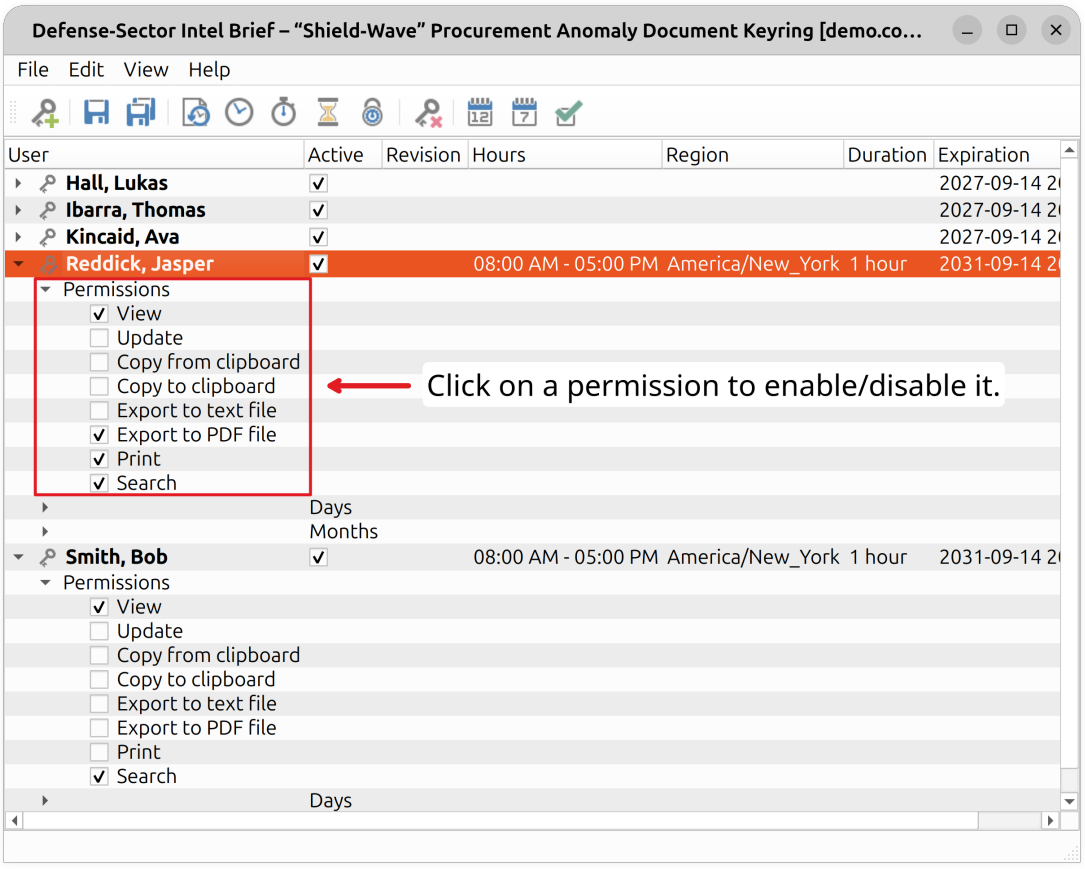


Figure 7.21: Updating the permissions of a document key

(See Figure 7.21) 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**.

7.4.3 Updating the active status of a document key

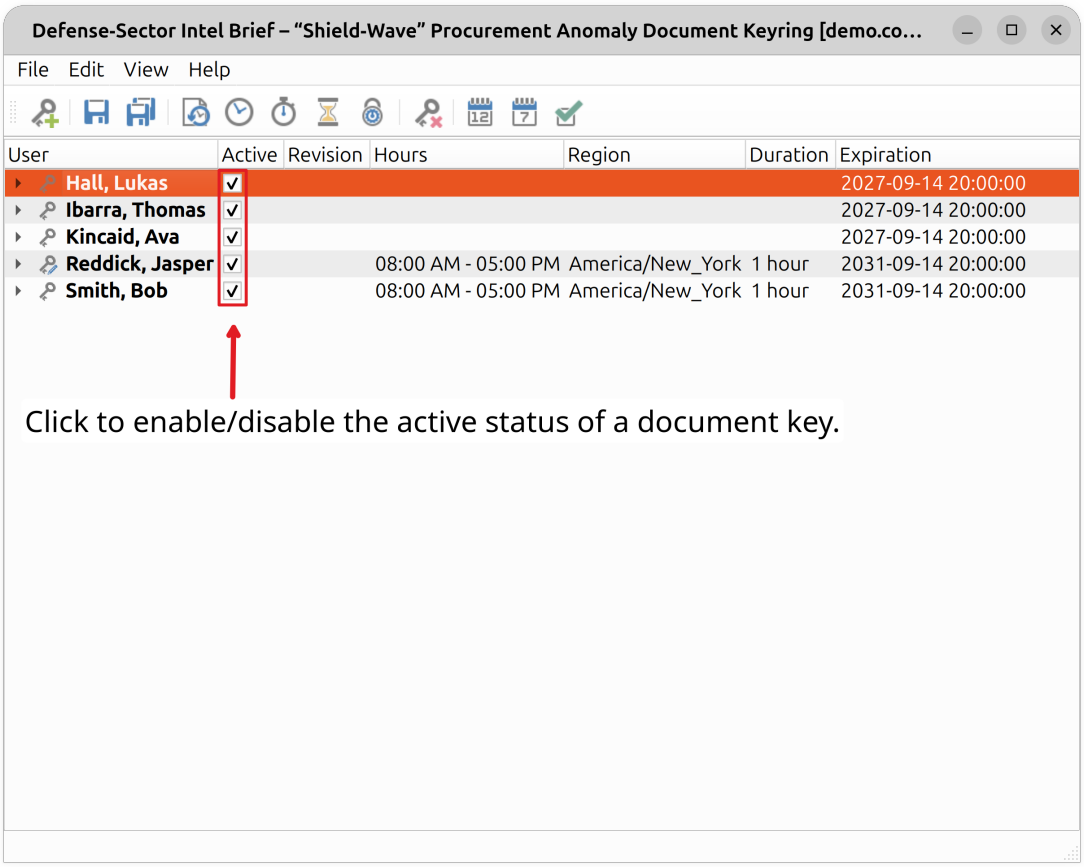


Figure 7.22: Updating the active status of a document key

To update the active status of a document key: *(See Figure 7.22)*

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**.

7.4.4 Updating the active months of a document key

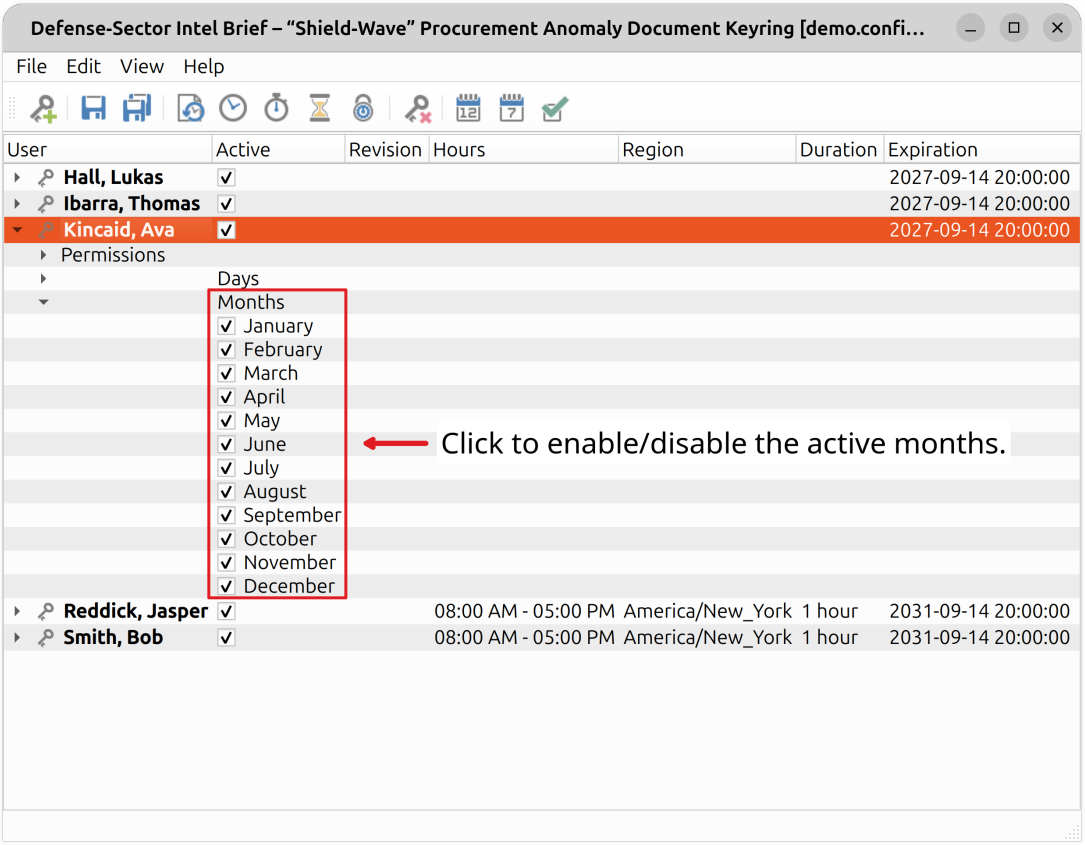


Figure 7.23: Updating the active months of a document key

(See Figure 7.23) 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**.

7.4.5 Updating the active days of a document key

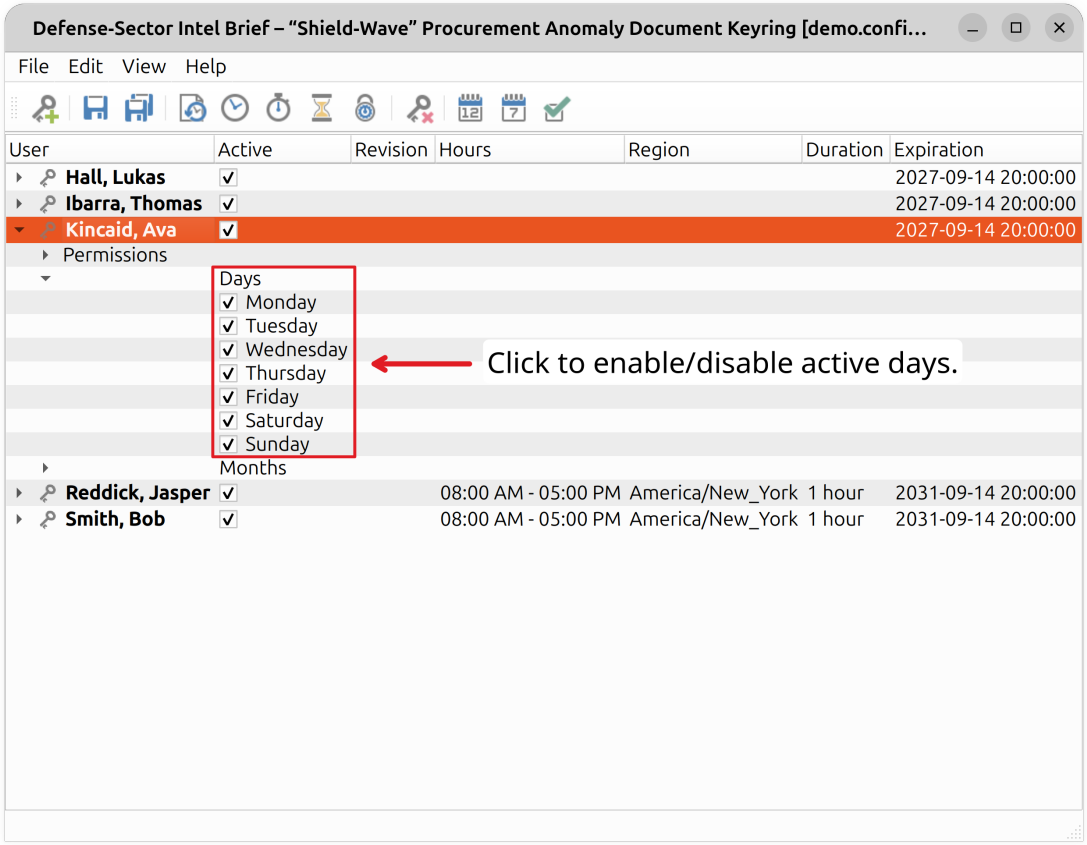


Figure 7.24: Updating the active days of a document key

To update the active days of a document key: *(See Figure 7.24)*

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**.

7.4.6 Updating the active hours of a document key

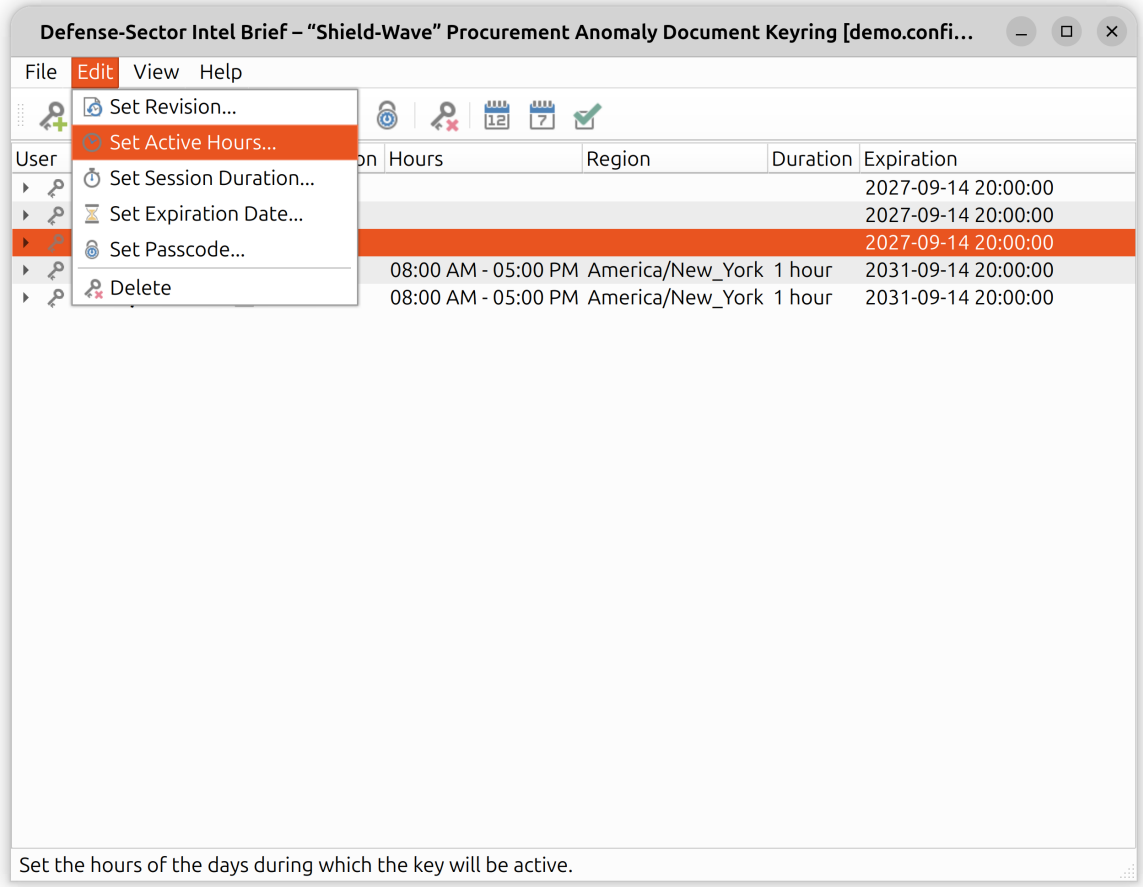


Figure 7.25: Editing the active hours of a document key

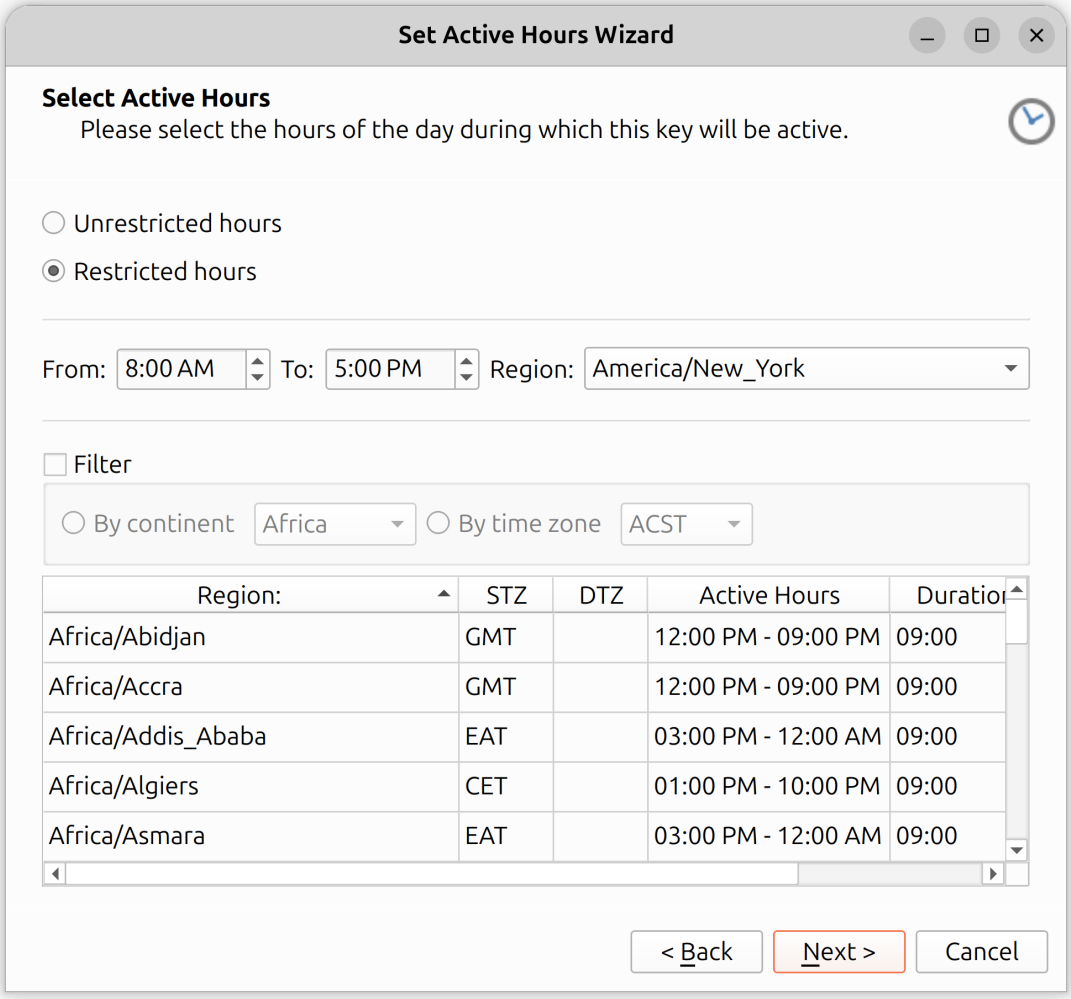


Figure 7.26: Updating the active hours of a document key

To update the active hours of a document key: *(See Figures 7.25, 7.26)*

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**.

7.4.7 Updating the session duration of a document key

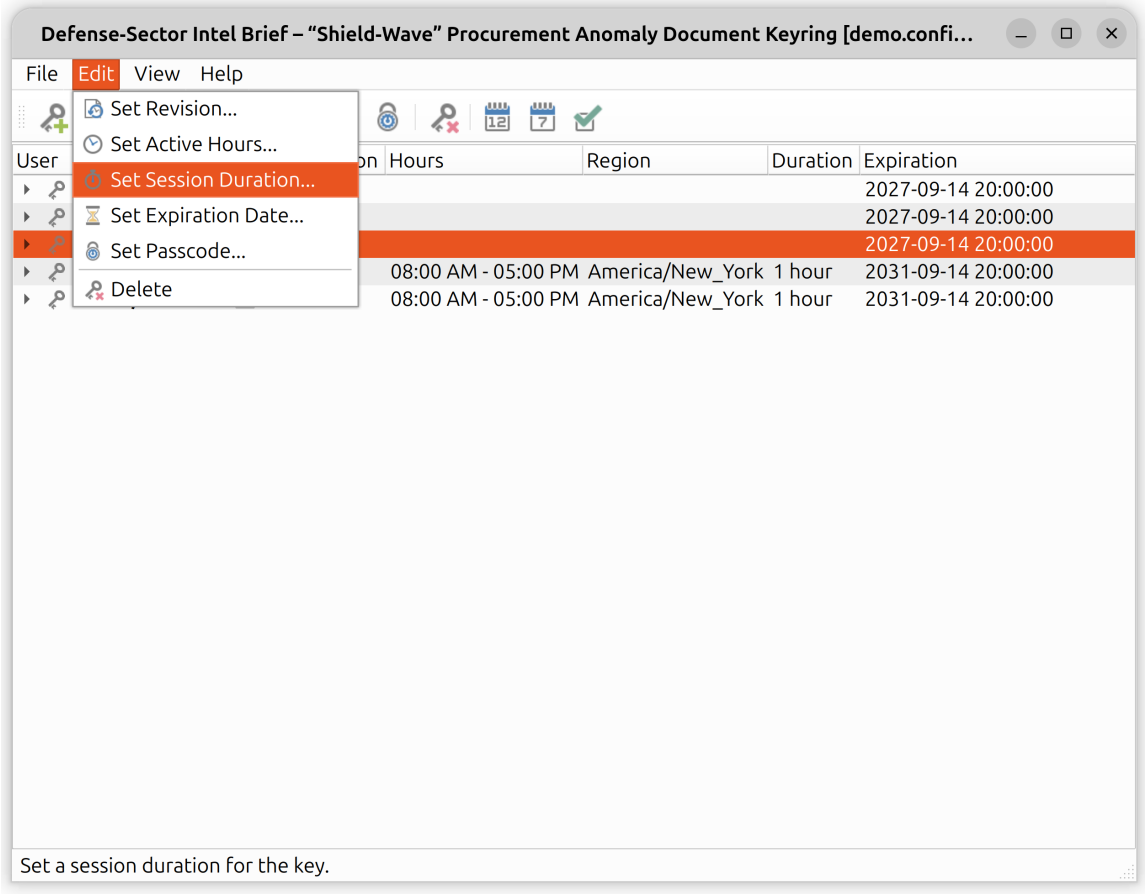


Figure 7.27: Editing the session duration of a document key

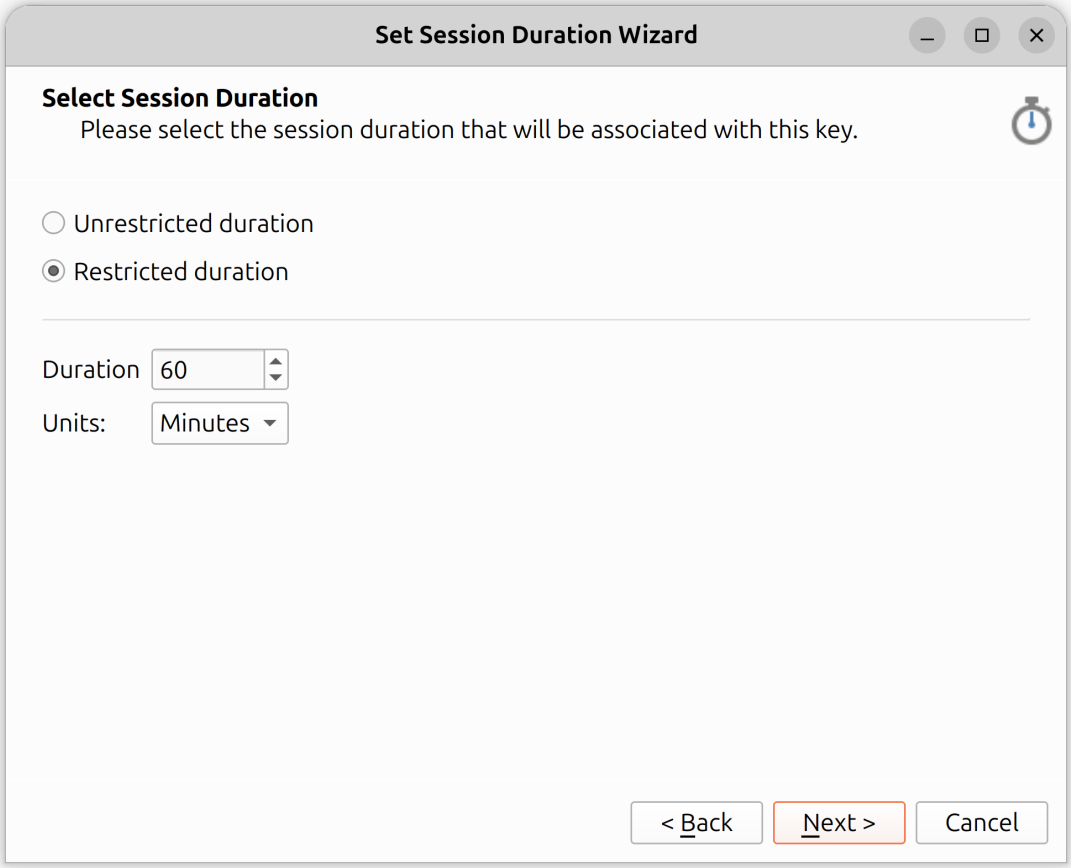


Figure 7.28: Updating the session duration of a document key

To update the session duration of a document key: *(See Figures 7.27, 7.28)*

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**.

7.4.8 Updating the expiration date of a document key

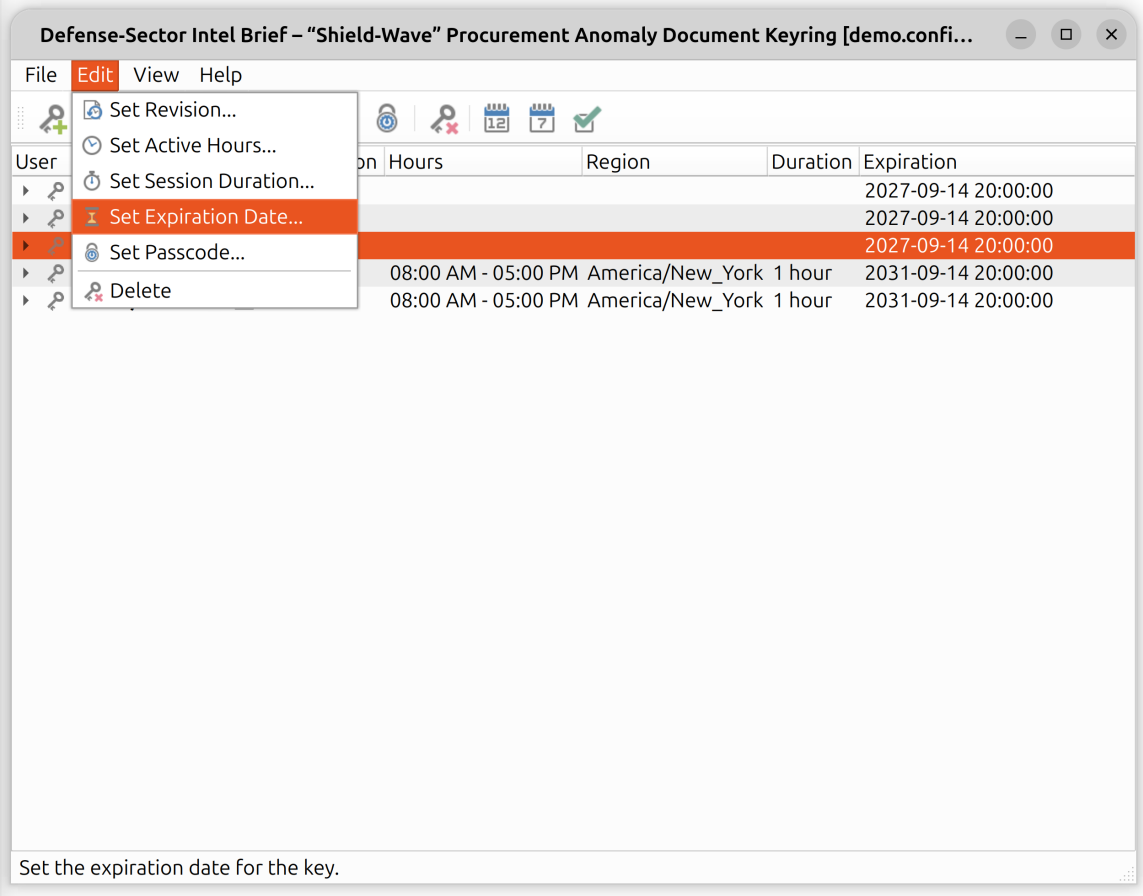


Figure 7.29: Editing the expiration date of a document key

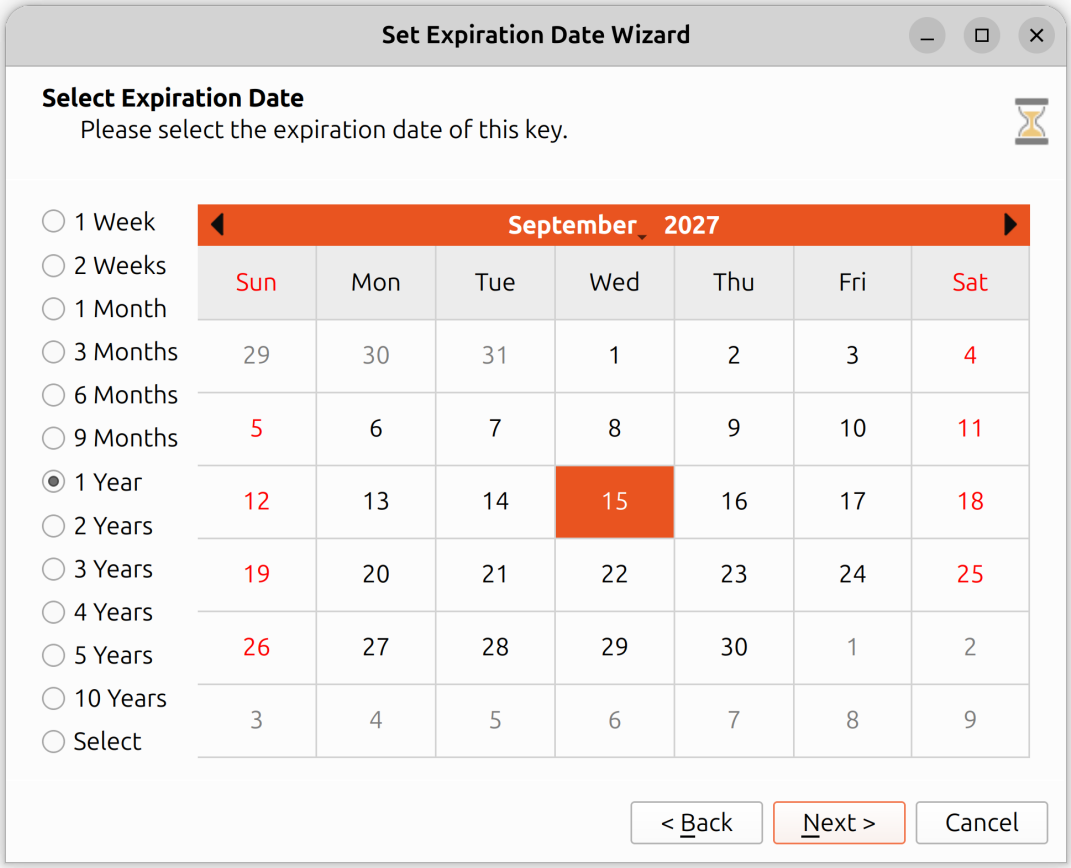


Figure 7.30: Updating the expiration date of a document key

To update the expiration date of a document key:

(See Figures 7.29, 7.30)

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**.

7.4.9 Updating the passcode of a document key

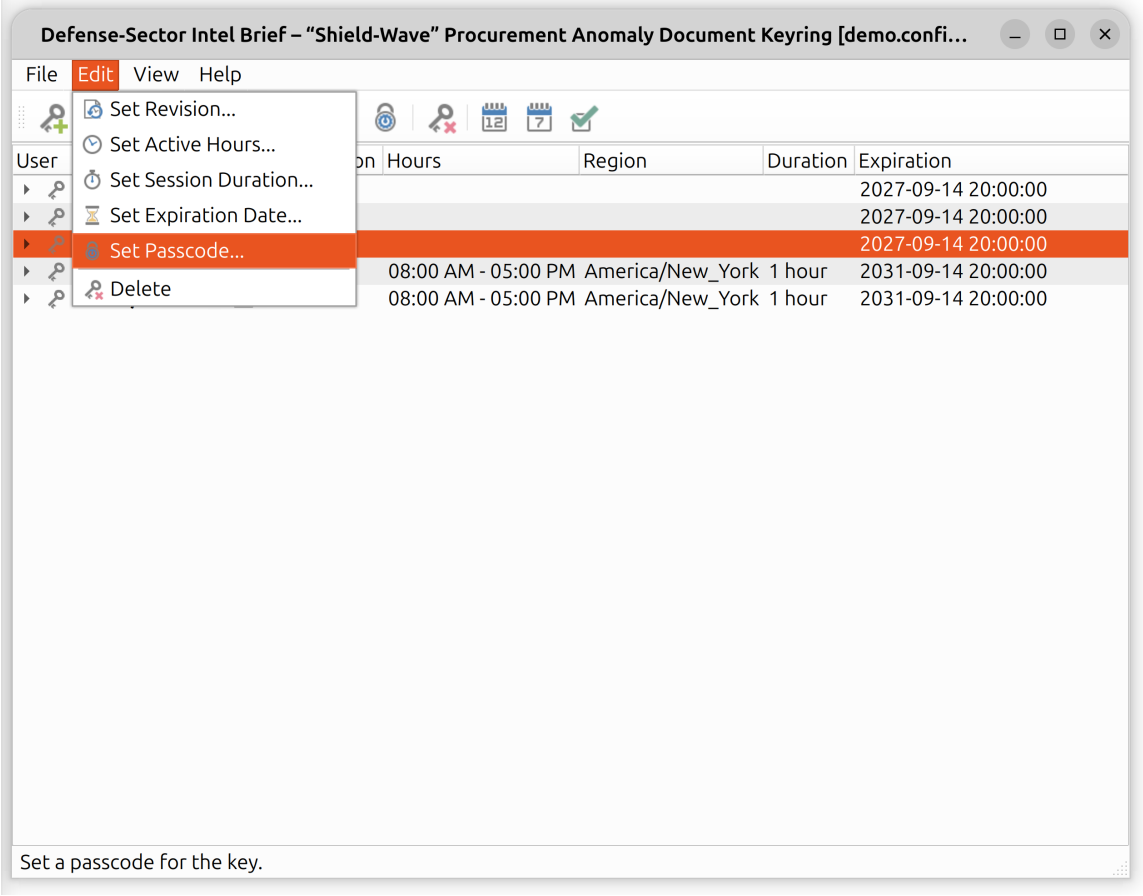


Figure 7.31: Editing the passcode of a document key

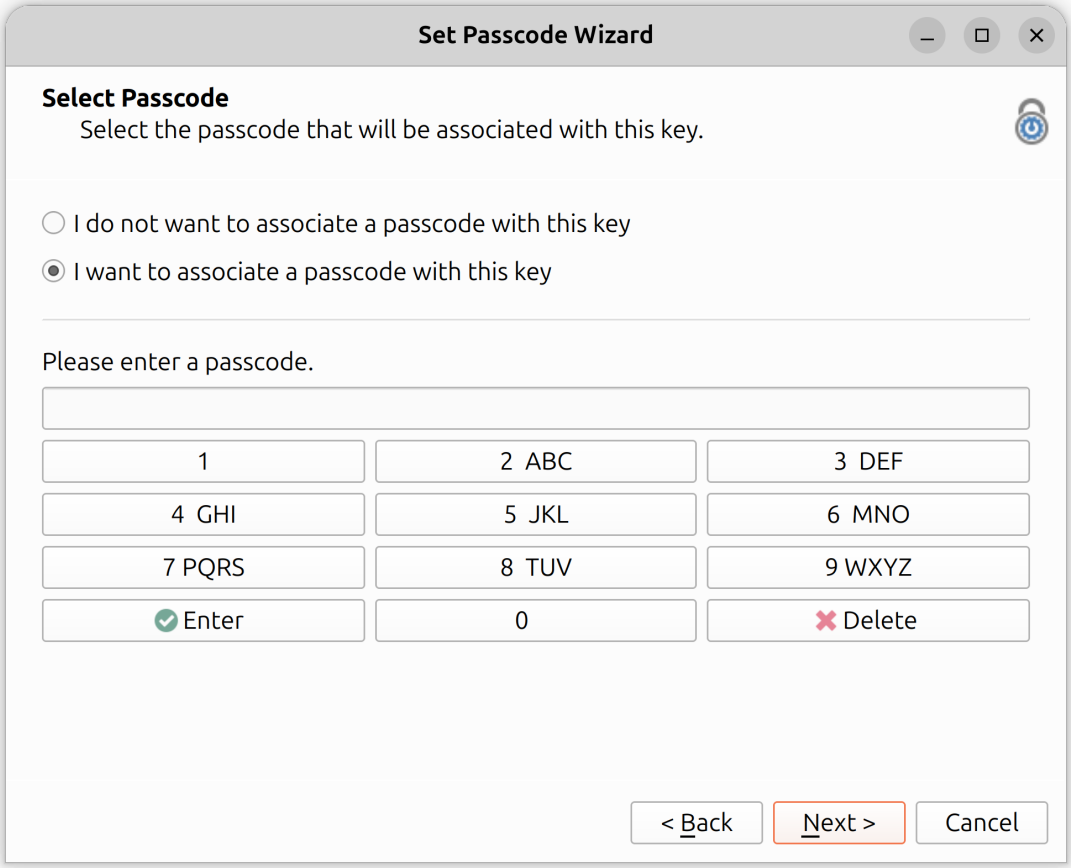


Figure 7.32: Updating the passcode of a document key

To update the passcode of a document key:

(See Figures 7.31, 7.32)

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**.

7.5 Deleting document keys

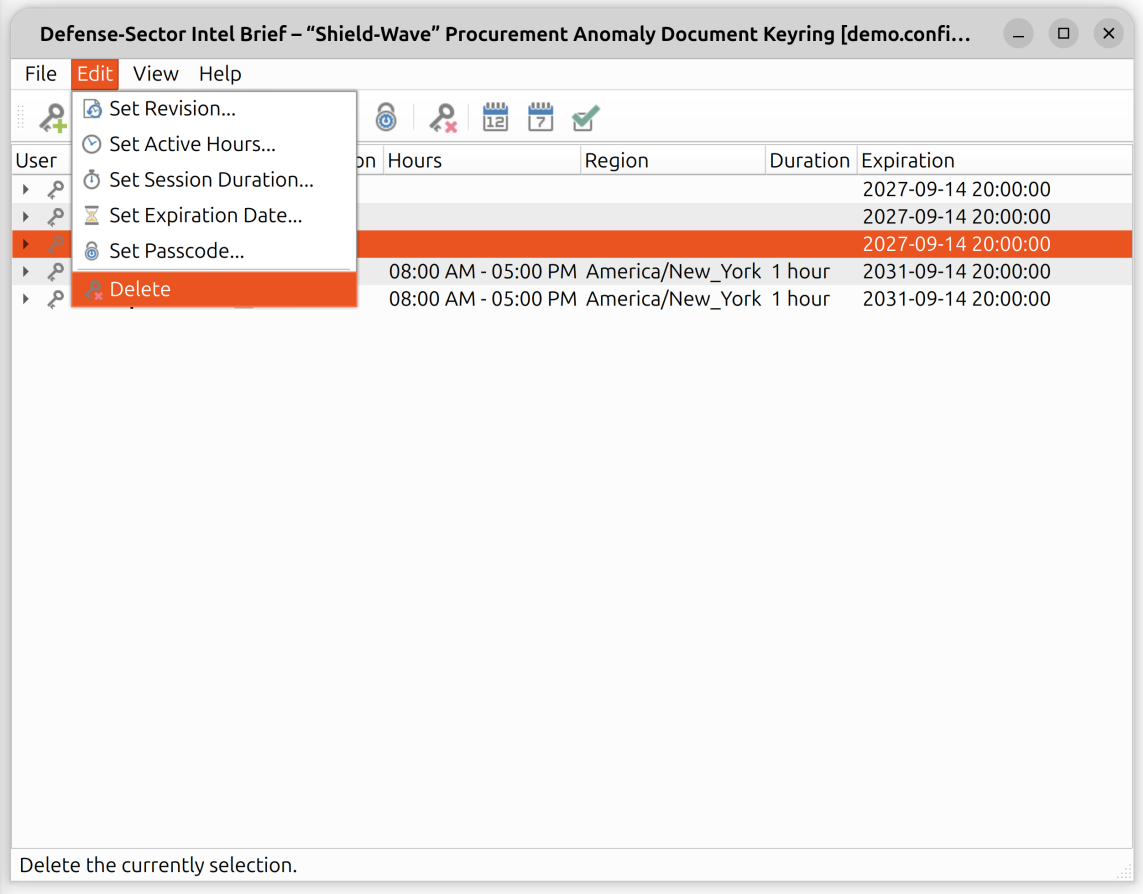


Figure 7.33: Deleting a document key

(See Figure 7.33)

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 8

Folders

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

8.1 Creating folders

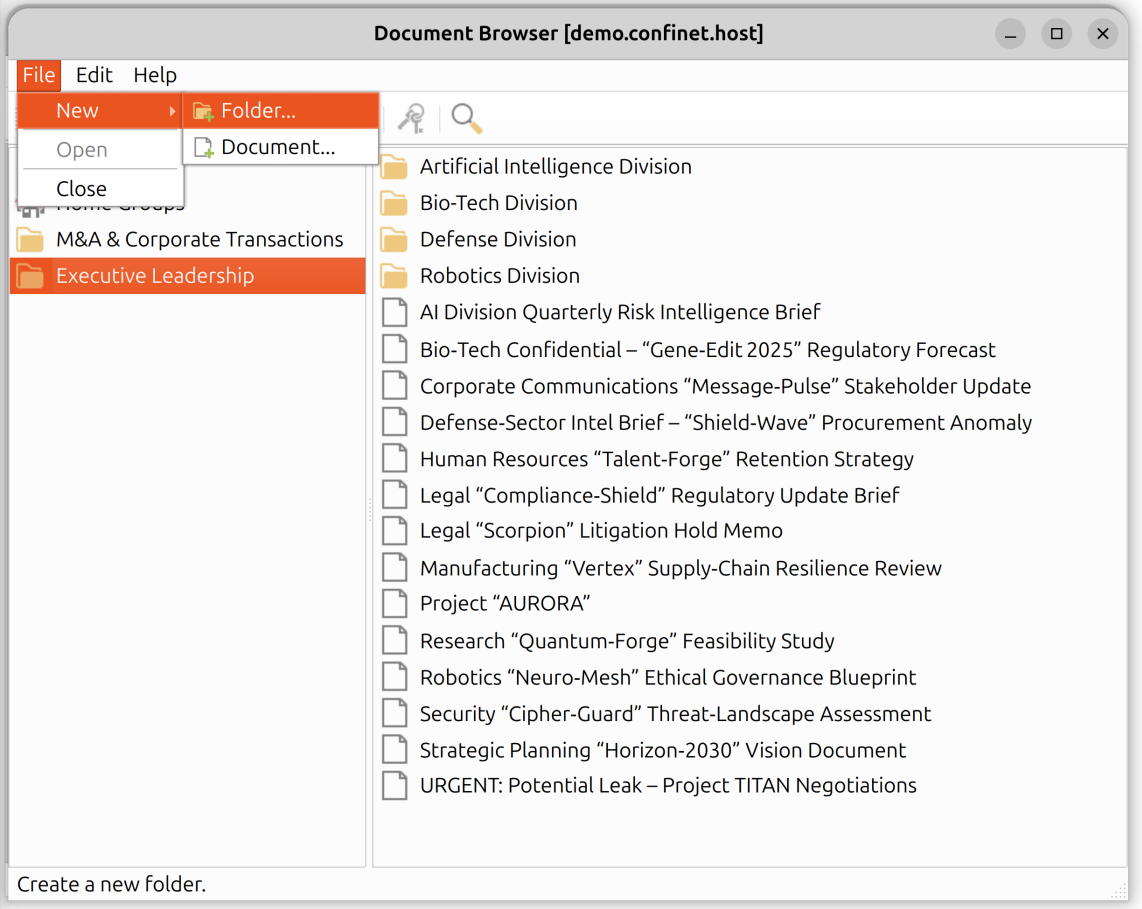


Figure 8.1: Creating a folder

(See Figures 8.1, 8.2)

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**.

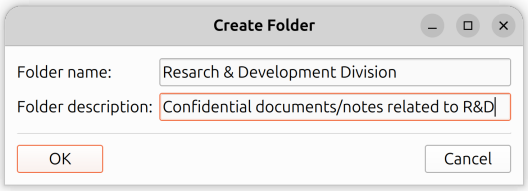


Figure 8.2: Create Folder dialog

8.2 Renaming folders

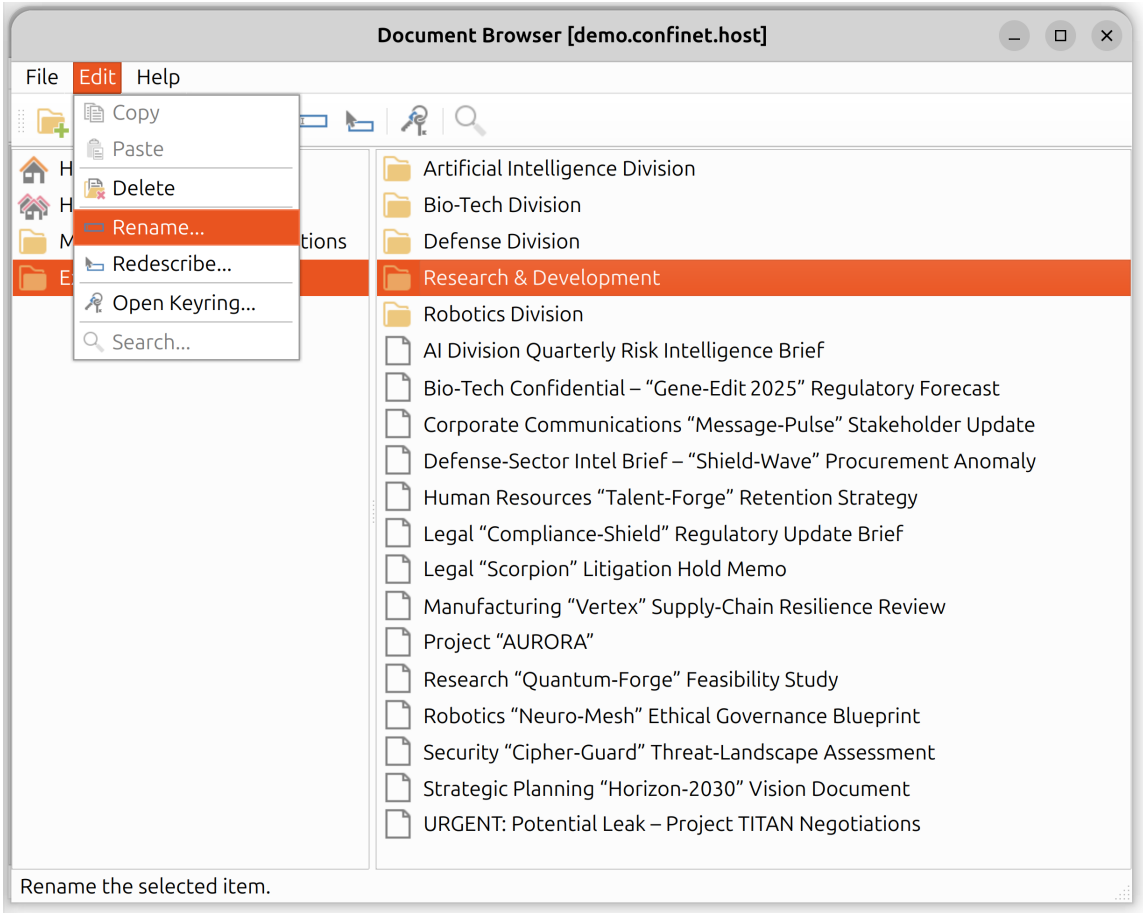


Figure 8.3: Renaming a folder

(See Figures 8.3, 8.4)

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**.

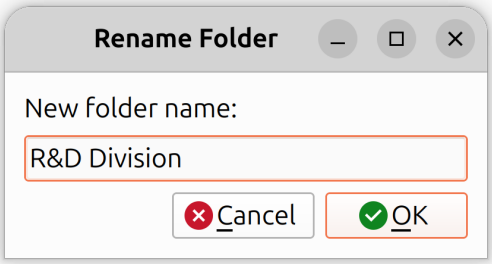


Figure 8.4: Rename Folder dialog

8.3 Deleting folders

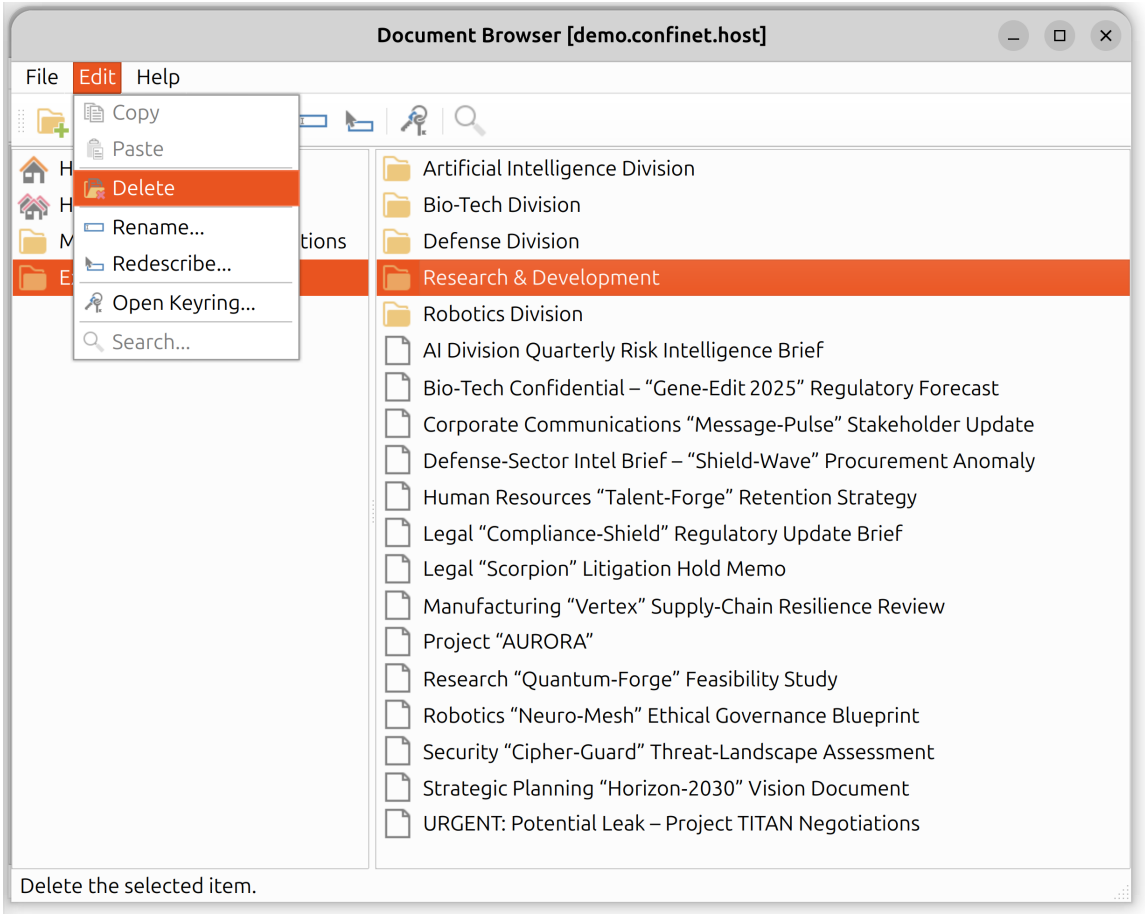


Figure 8.5: Deleting a folder

(See Figure 8.5)

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.

8.4 Searching folders

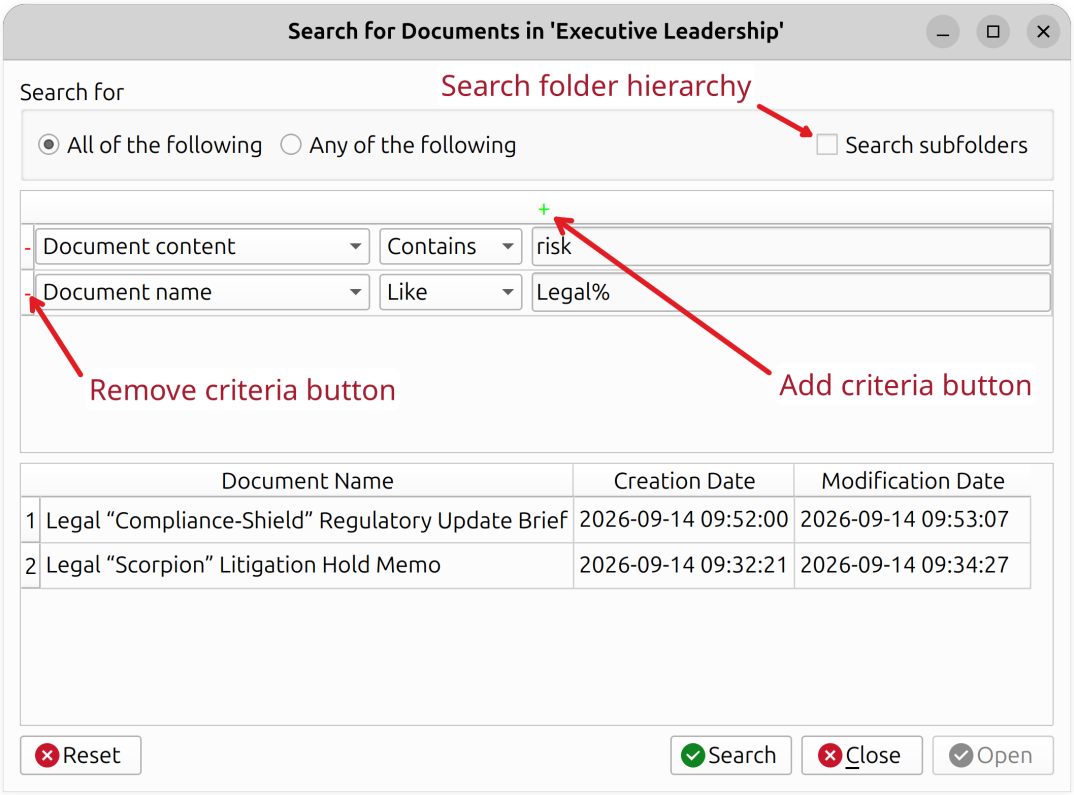


Figure 8.6: Search for documents in *folder name* dialog

To search for documents in a folder: *(See Figure 8.6)*

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**.

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

Chapter 9

Sharing Folders

9.1 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]

[1] This 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]

9.1.1 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 *viewed*	lossless
Allow the contents of the folder to be *searched*	lossless

Table 9.1: 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 documents[4] using full-text search capabilities.

9.1.2 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:

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

[3] The 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).

[4] The 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 9.2: 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.

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

9.2 Viewing folder keys created for you

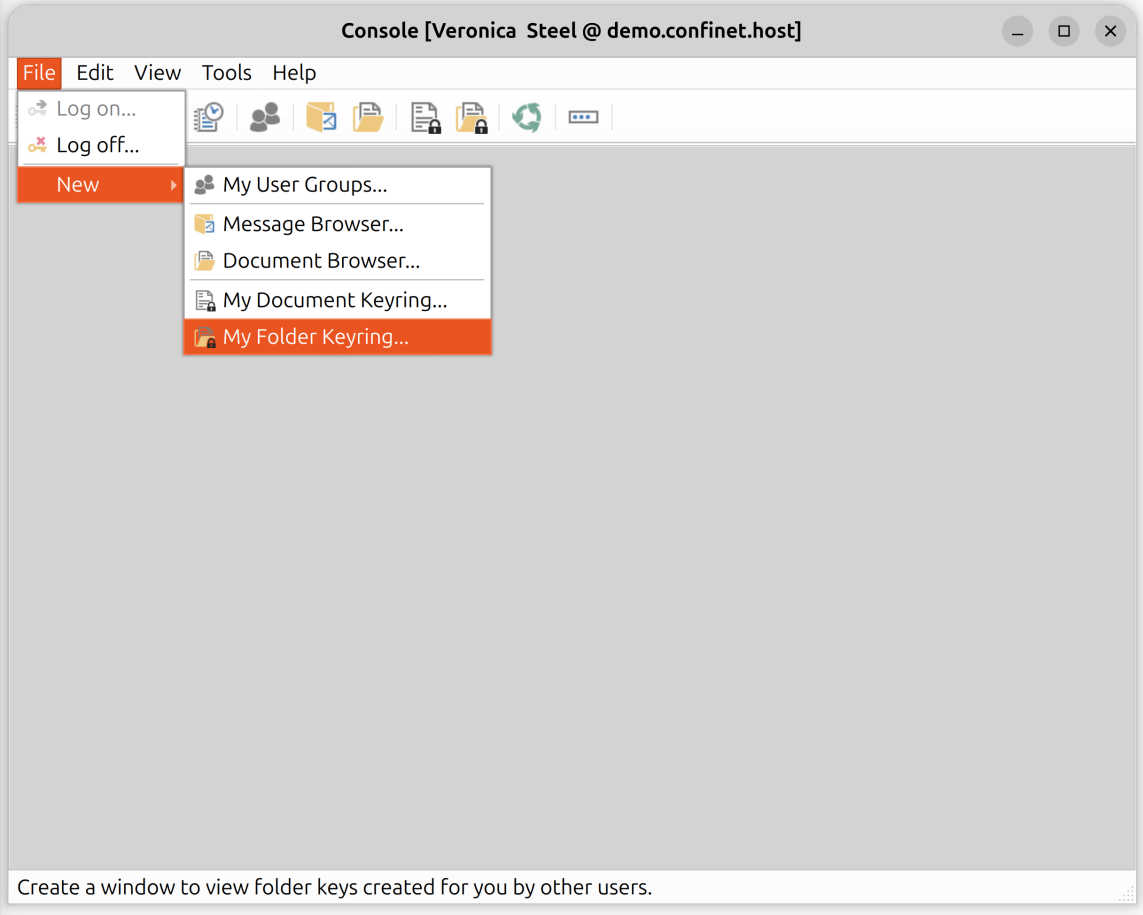


Figure 9.1: Opening My Folder Keyring window

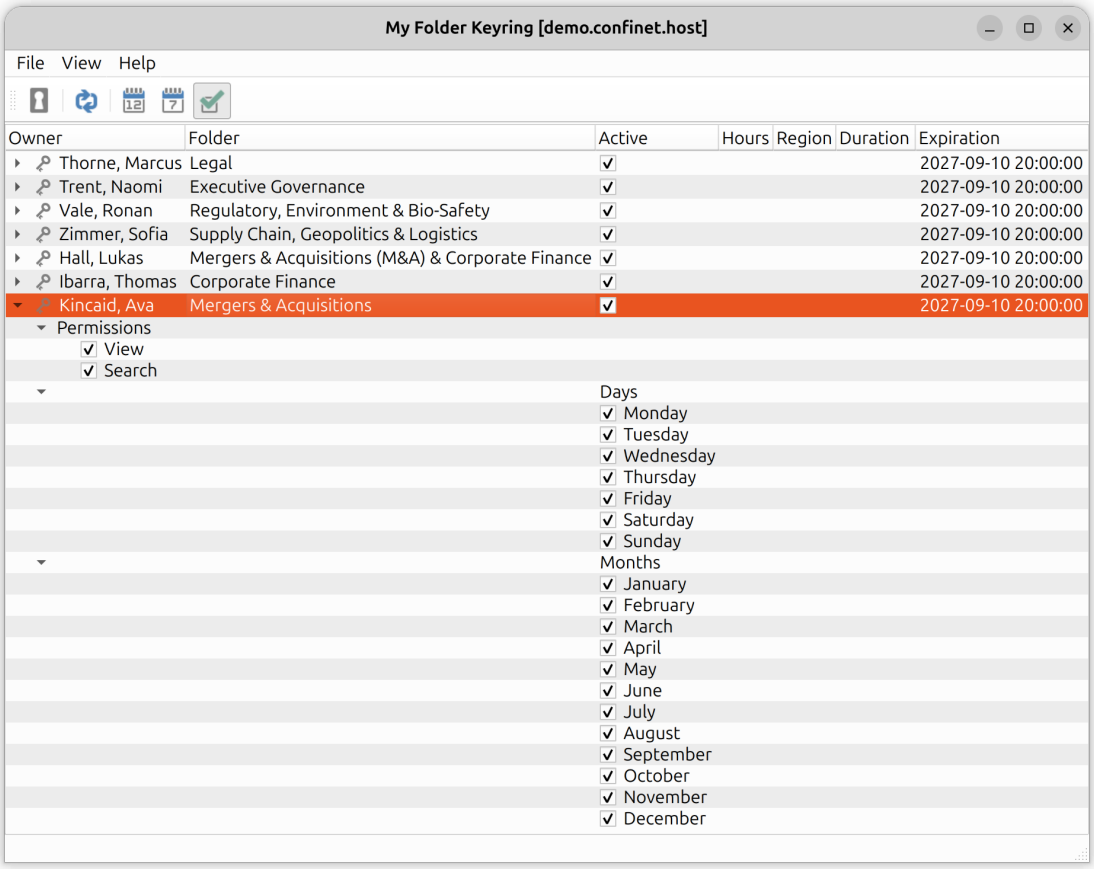


Figure 9.2: Viewing My Folder Keyring window

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: *(See Figures 9.1, 9.2)*

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.

9.3 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]

[6] By default, the folder key will have the *view* and *search* permissions.
[7] By default, the folder key will have an *active* status.
[8] By default, the folder key will be active on *every month of the year*.
[9] By default, the folder key will be active on *every day of the week*.
[10] By default, the folder key will be active during *every hour of the day*.

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.

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

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

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

9.3.1 Opening a folder keyring

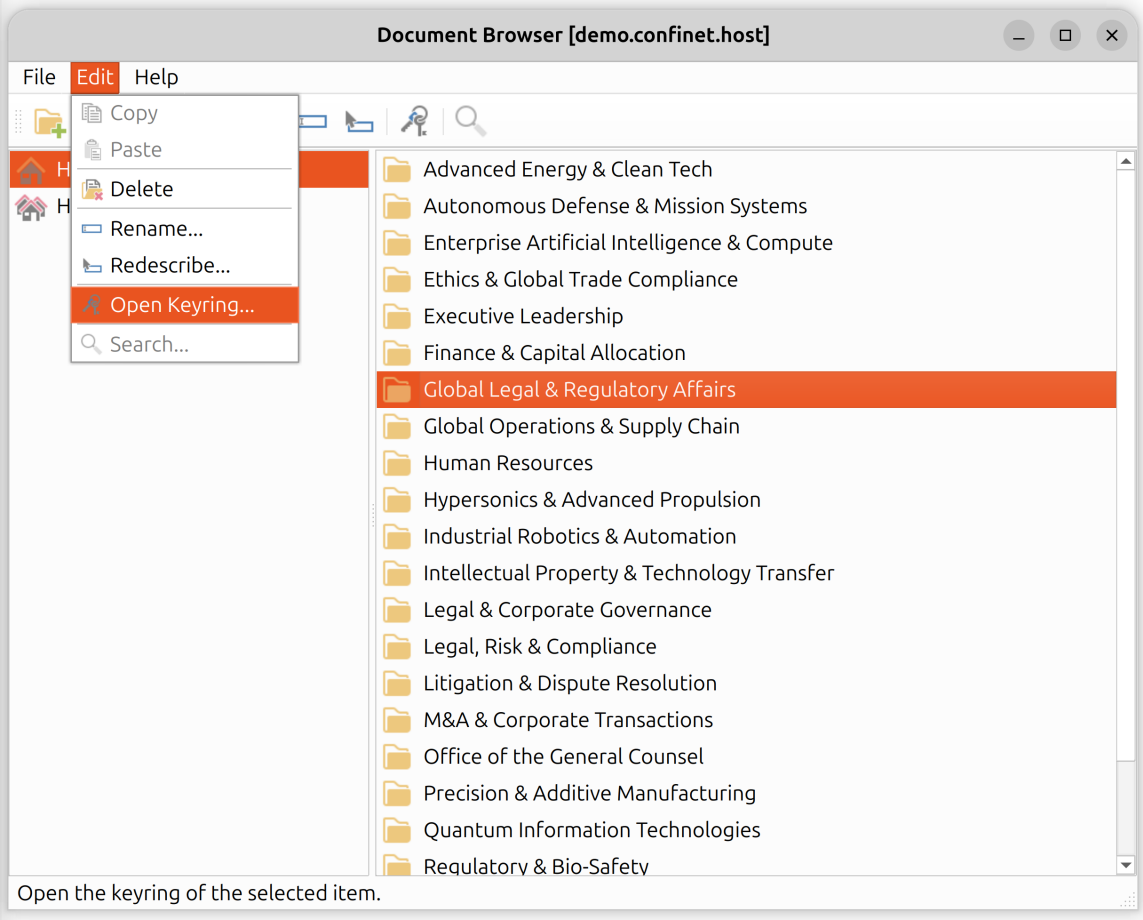


Figure 9.3: Opening a folder keyring

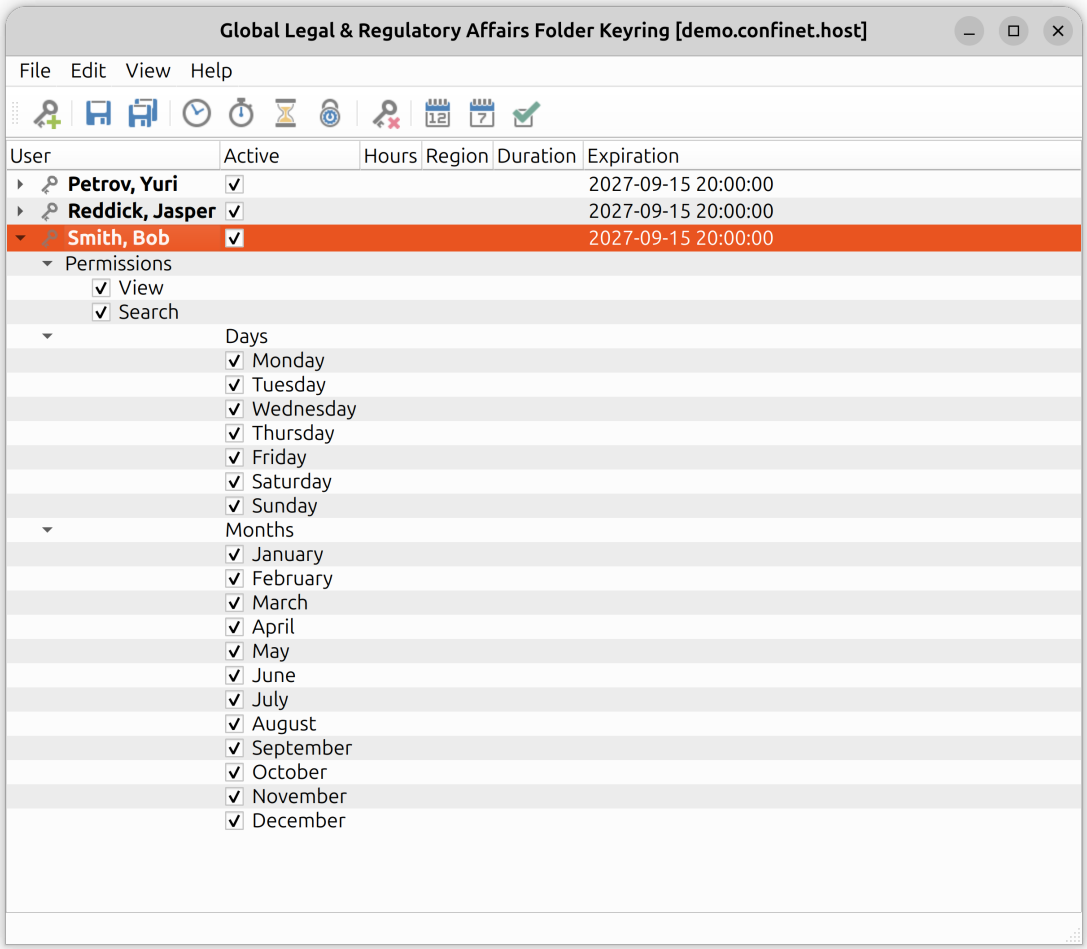


Figure 9.4: Folder Keyring window

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: *(See Figures 9.3, 9.4)*

1. In a Document Browser window, select the folder.
2. From the **Edit** menu, click **Open Keyring**.

   ↪ The system displays the Folder Keyring window

9.3.2 Starting the Create Folder Key wizard

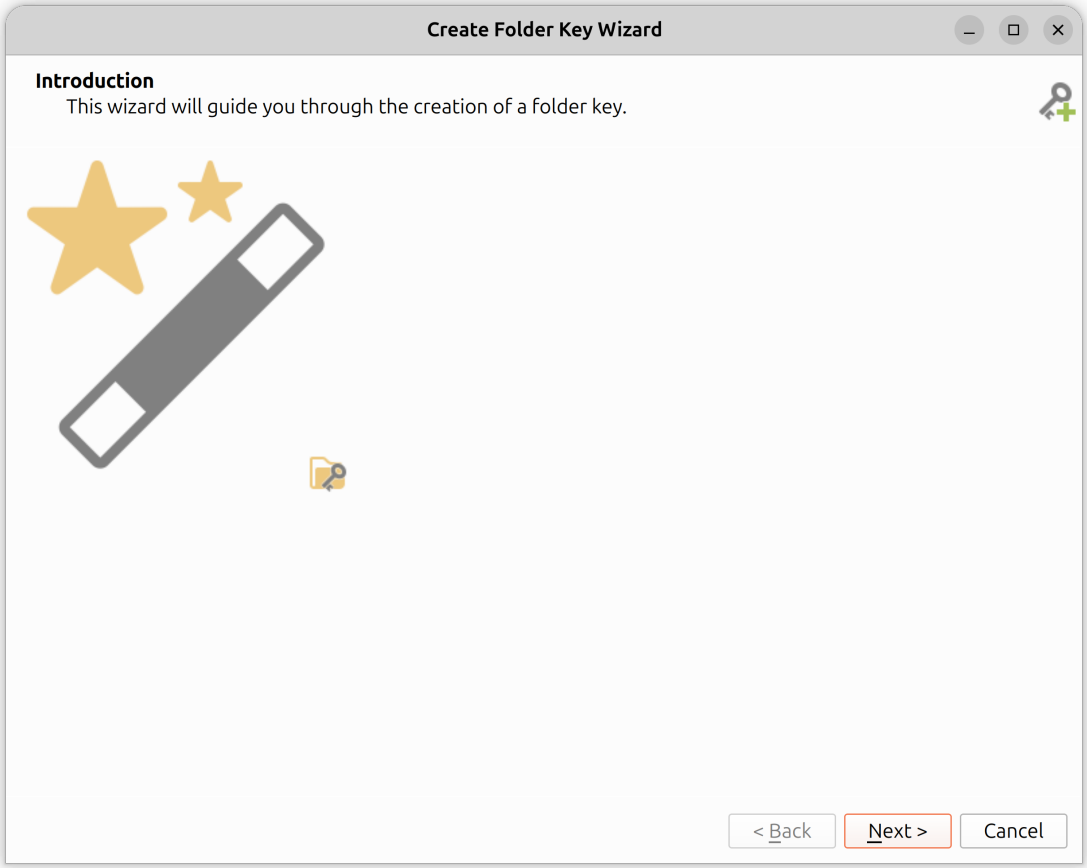


Figure 9.5: Create Folder Key wizard

(See Figure 9.5) 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**.

9.3.3 Folder key permissions

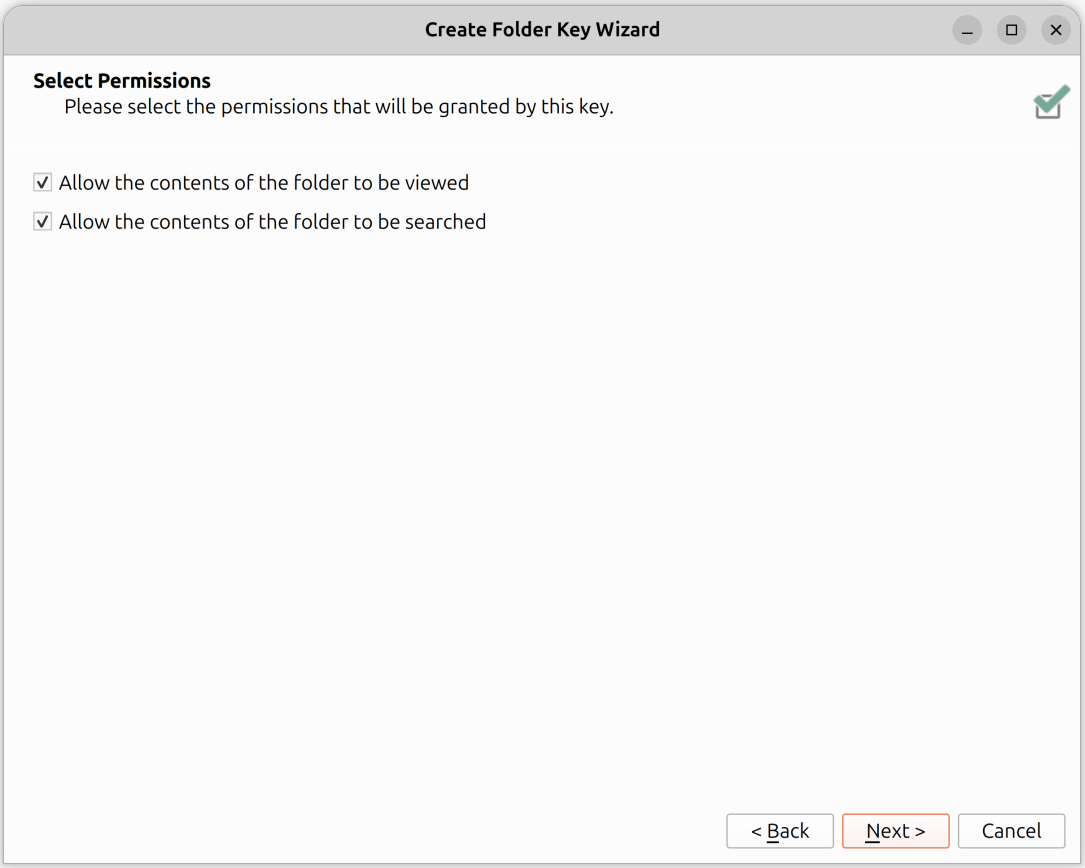


Figure 9.6: Selecting the permissions of a folder key

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

(See Figure 9.6)

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

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

9.3.4 Folder key active status

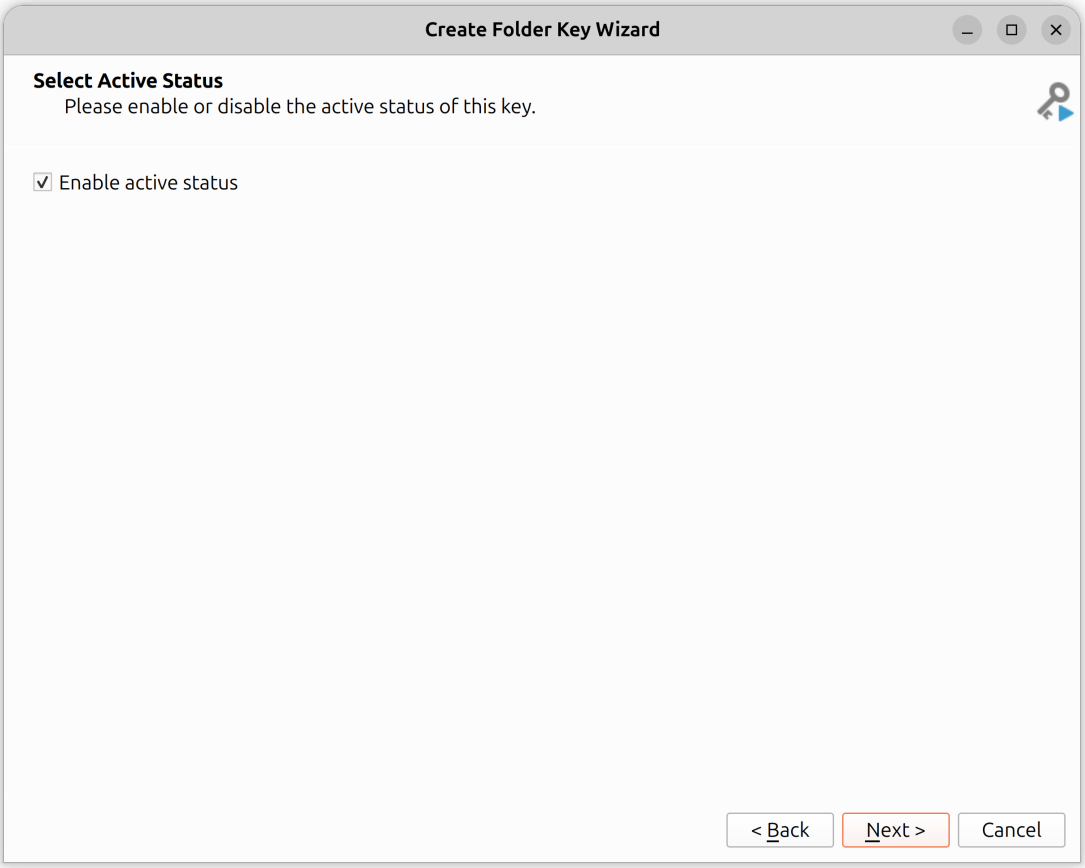


Figure 9.7: Selecting the active status of a folder key

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

(See Figure 9.7)

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**.

9.3.5 Folder key active months

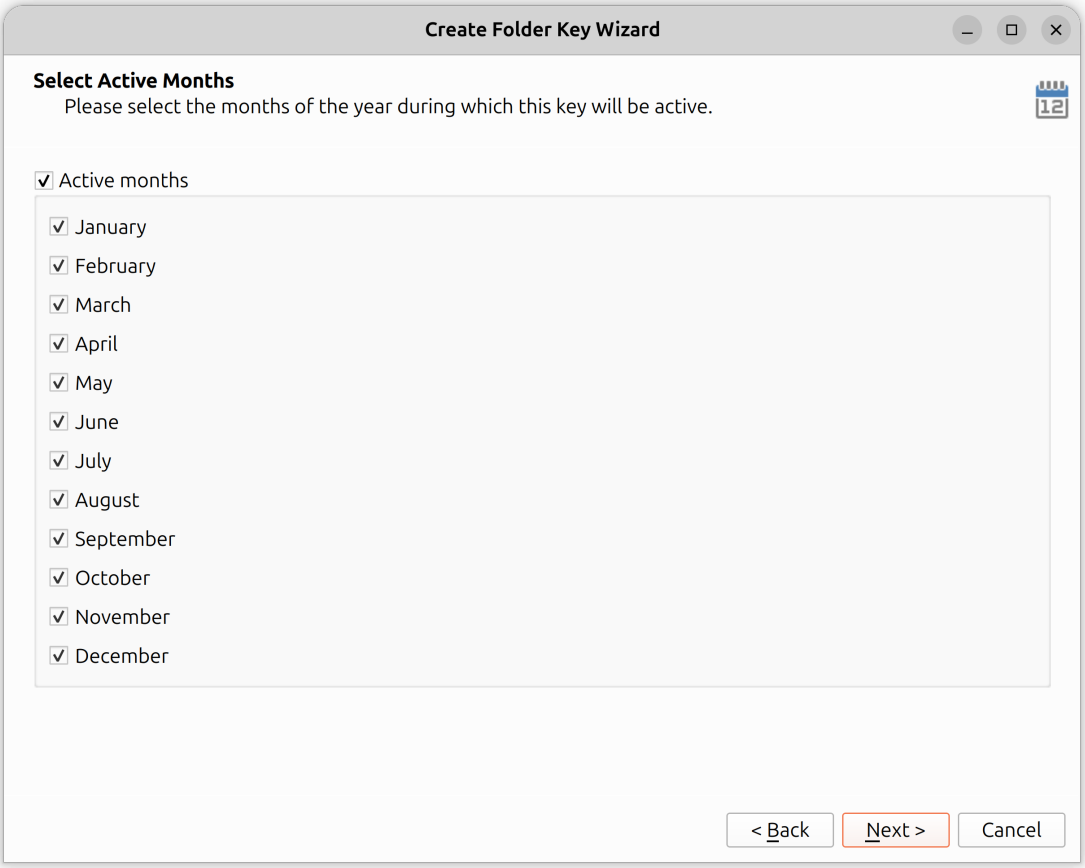


Figure 9.8: Selecting the active months of a folder key

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.

(See Figure 9.8)

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

9.3.6 Folder key active days

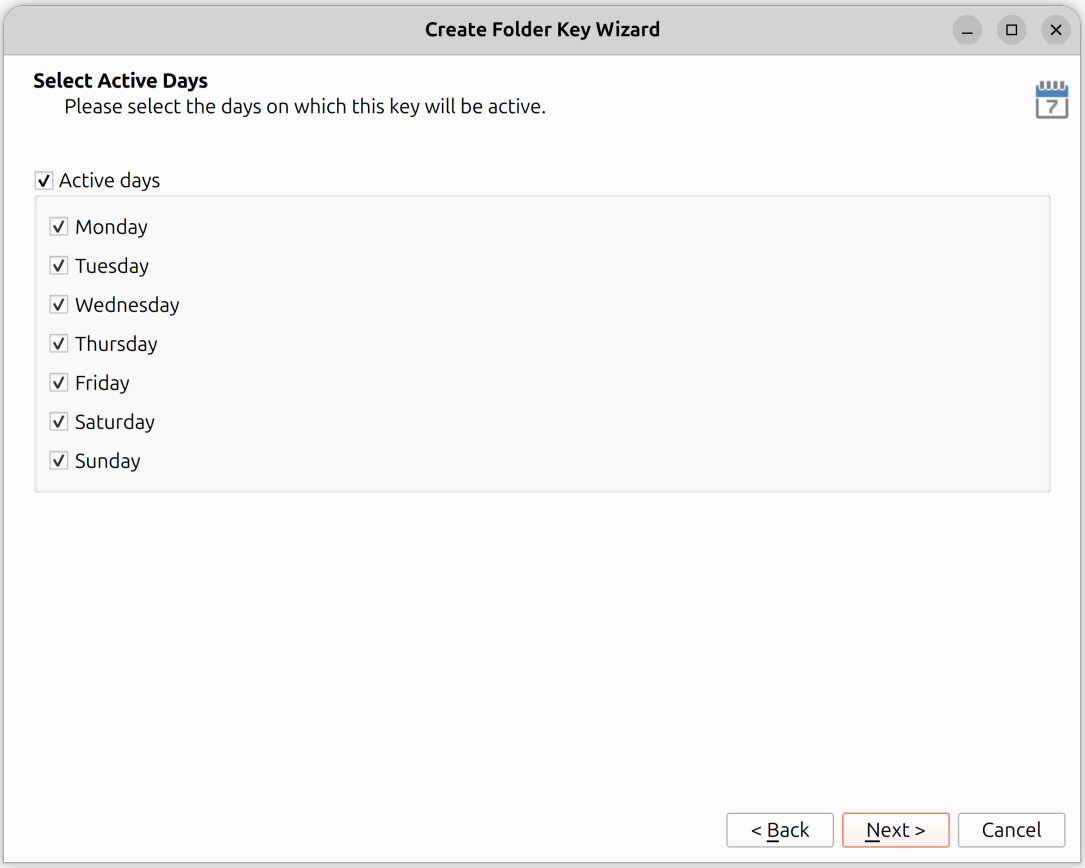


Figure 9.9: Selecting the active days of a folder key

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.

(See Figure 9.9)

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

9.3.7 Folder key active hours

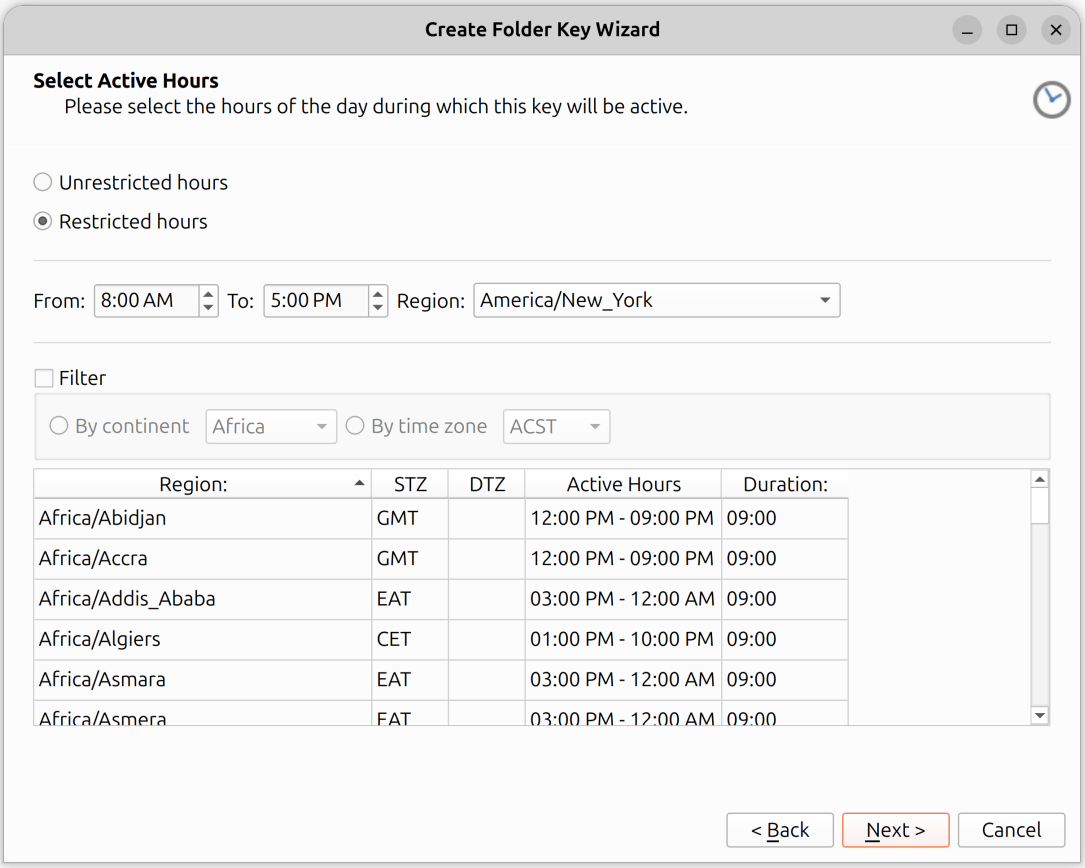


Figure 9.10: Selecting the active hours of a folder key

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.

(See Figure 9.10)

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

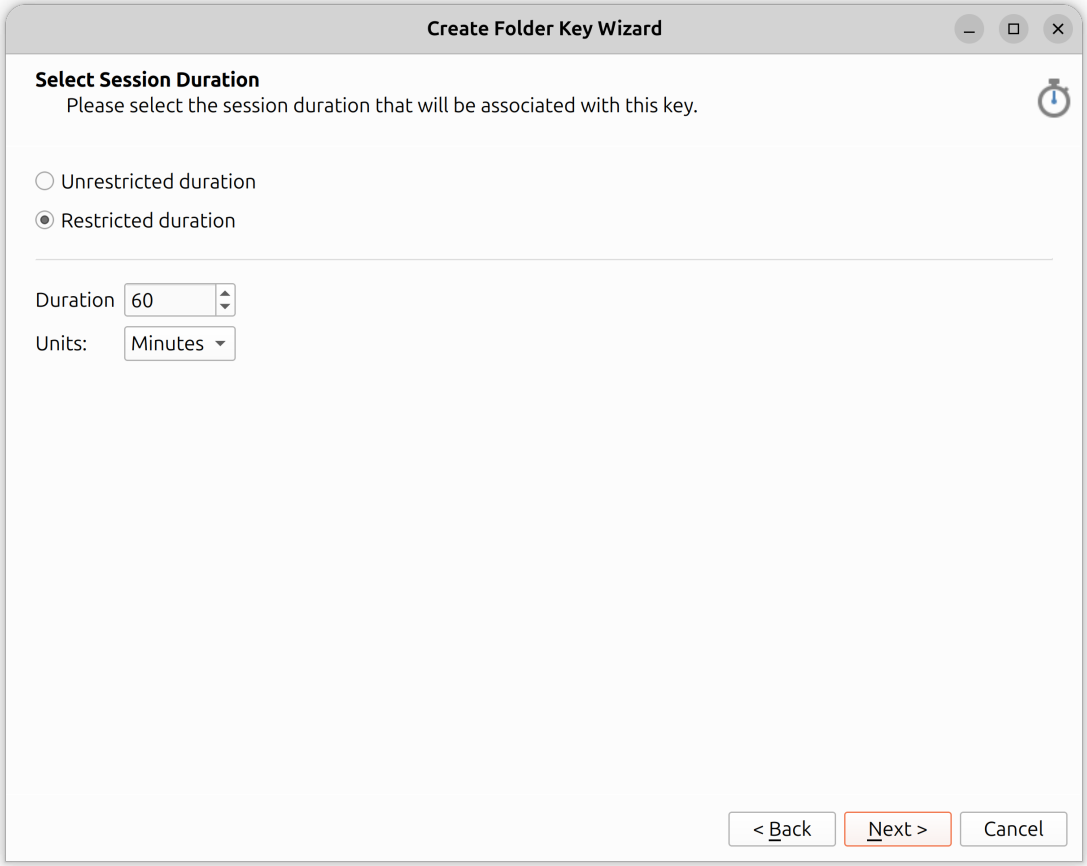


Figure 9.11: Selecting the session duration of a folder key

9.3.8 Folder key session duration

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

(See Figure 9.11)

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**.

9.3.9 Folder key expiration date

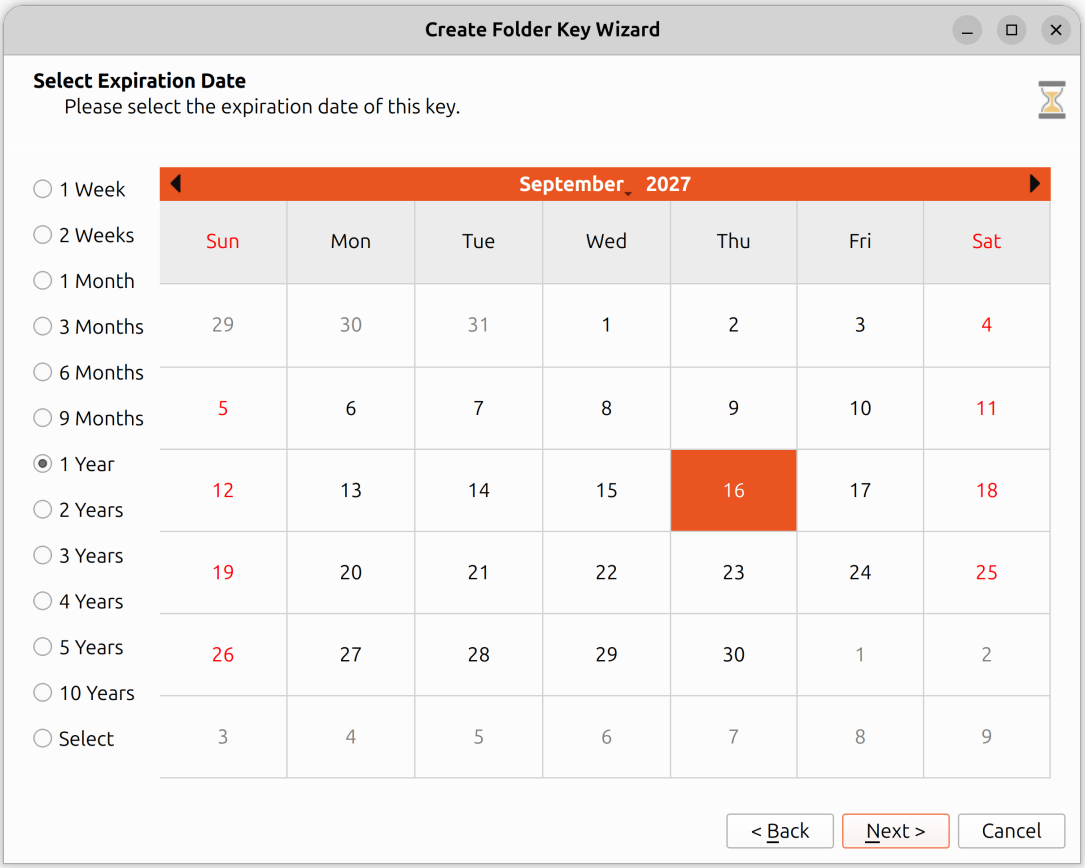


Figure 9.12: Selecting the expiration date of a folder key

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

(See Figure 9.12)

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

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

9.3.10 Folder key passcode

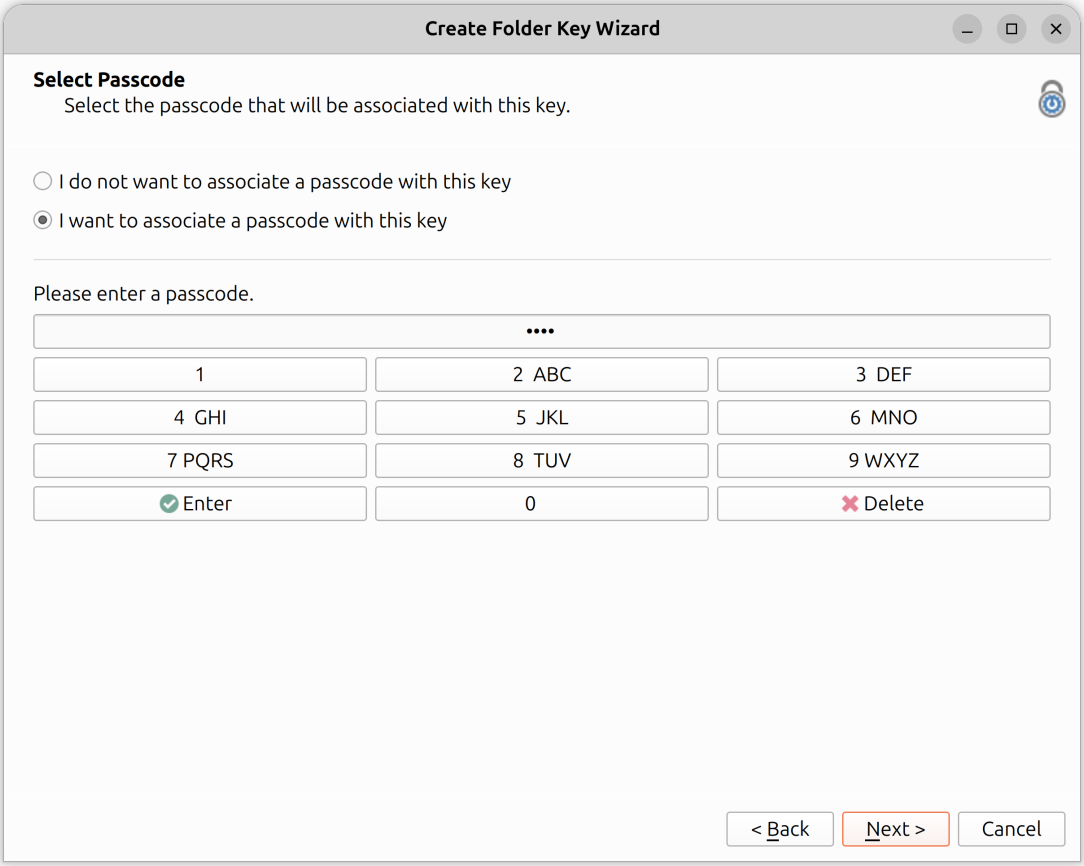


Figure 9.13: Selecting a passcode for a folder key

This page of the Create Folder Key wizard allows you to specify a passcode for the folder key.[14] *(See Figure 9.13)*

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**.

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

9.3.11 Folder key users

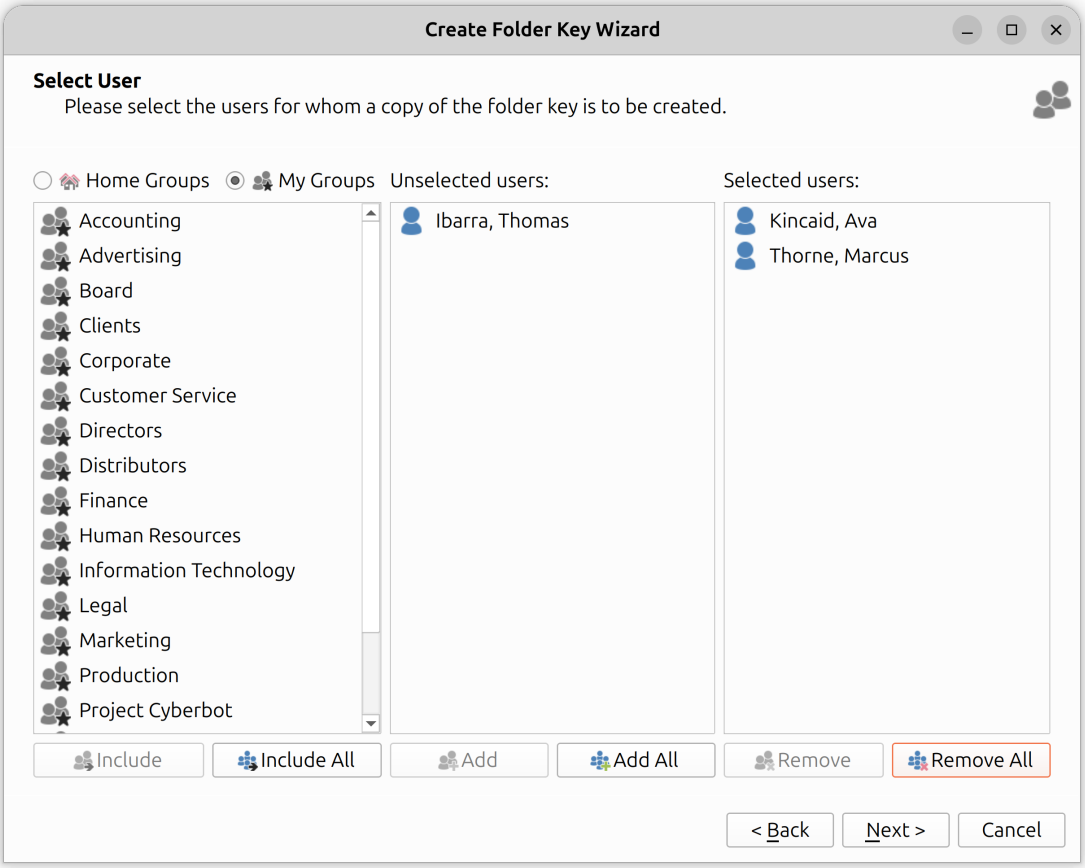


Figure 9.14: Selecting users

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.

(See Figure 9.14)

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

9.3.12 Folder key confirmation

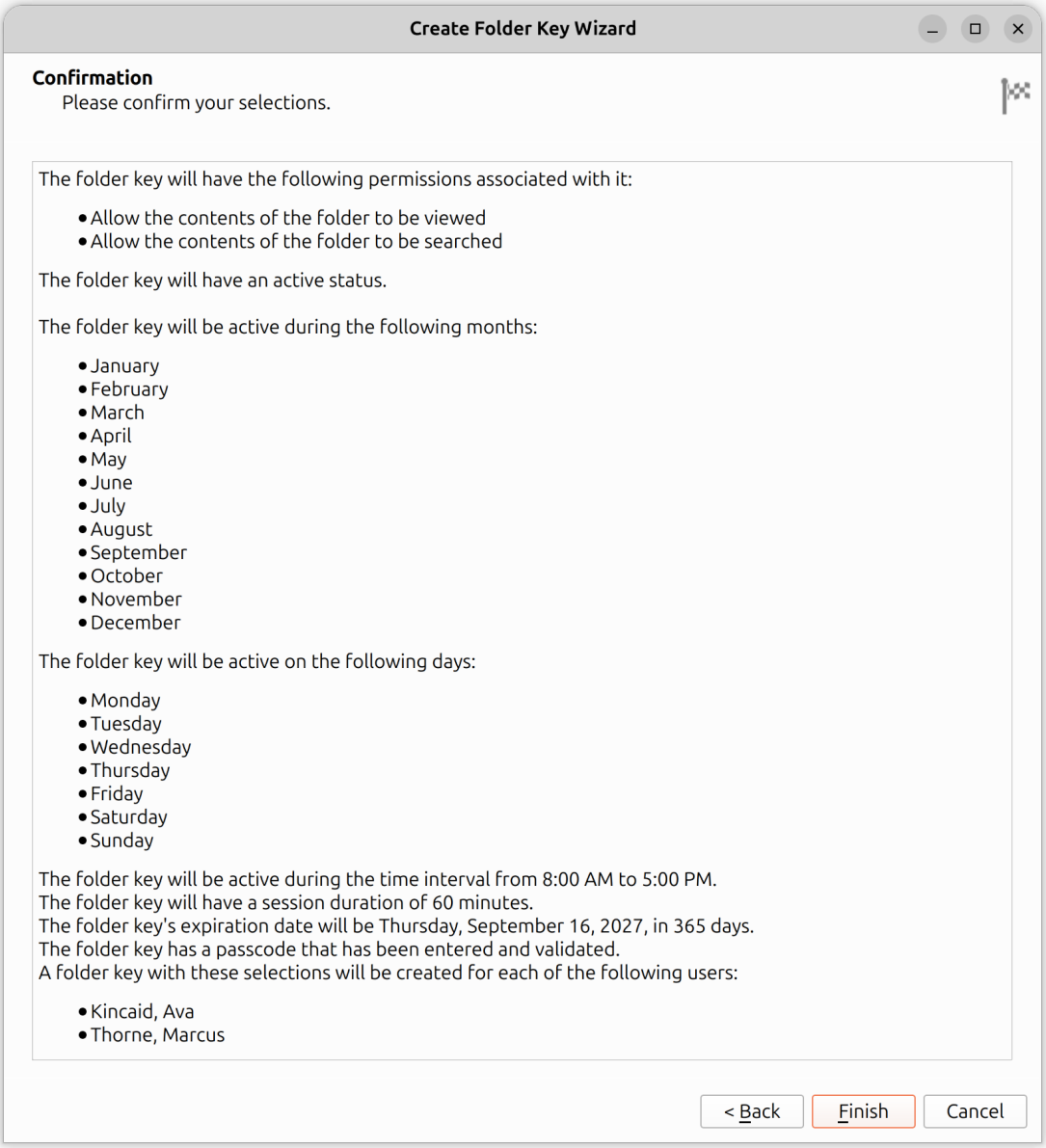


Figure 9.15: Confirming the creation of the folder key

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

(See Figures 9.15, 9.16)

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.

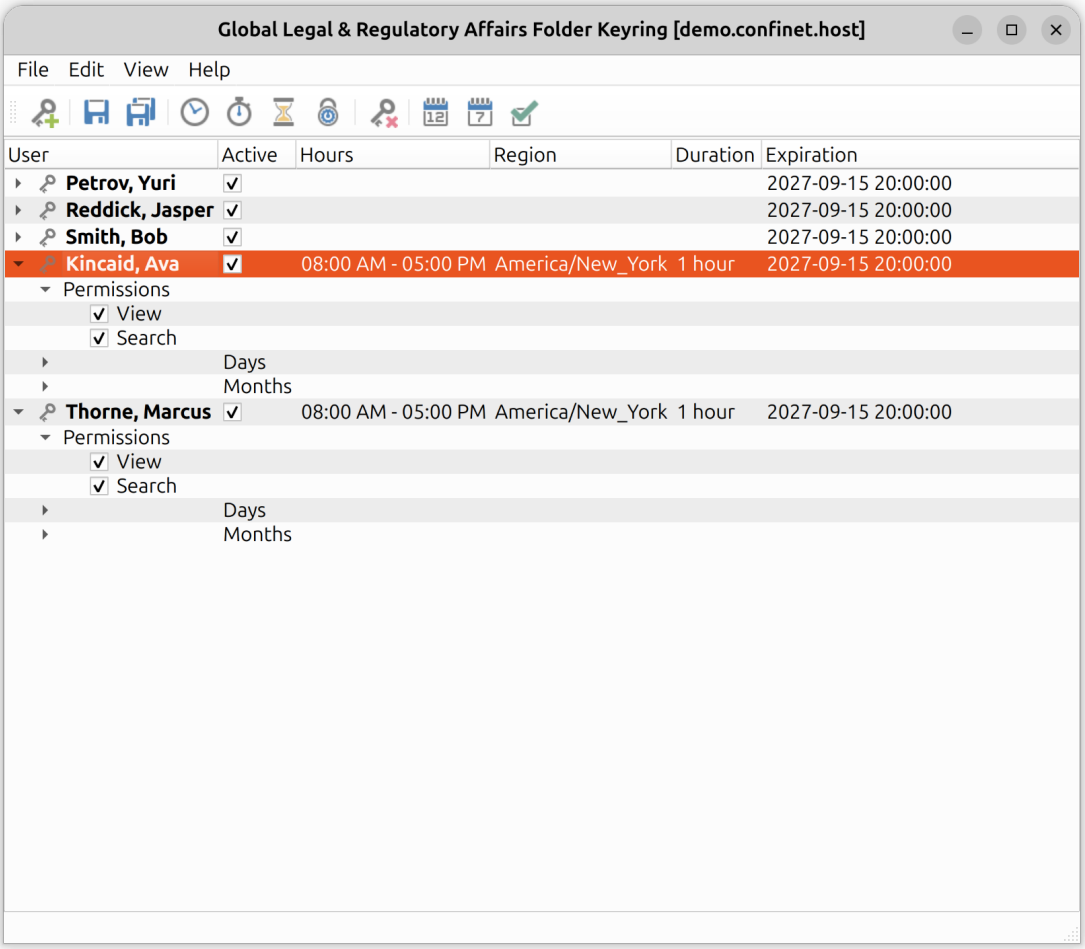


Figure 9.16: Updated Folder Keyring window

9.4 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

9.4.1 Updating the permissions of a folder key

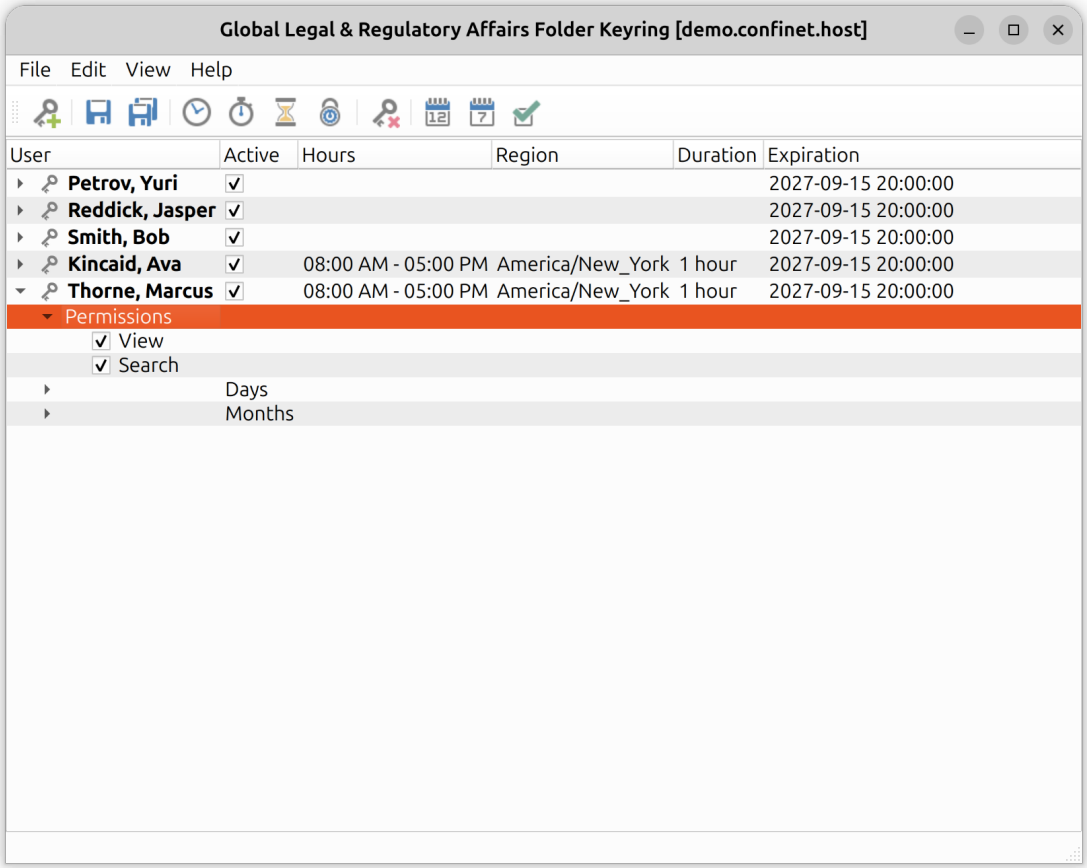


Figure 9.17: Updating the permissions of a folder key

(See Figure 9.17) 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**.

9.4.2 Updating the active status of a folder key

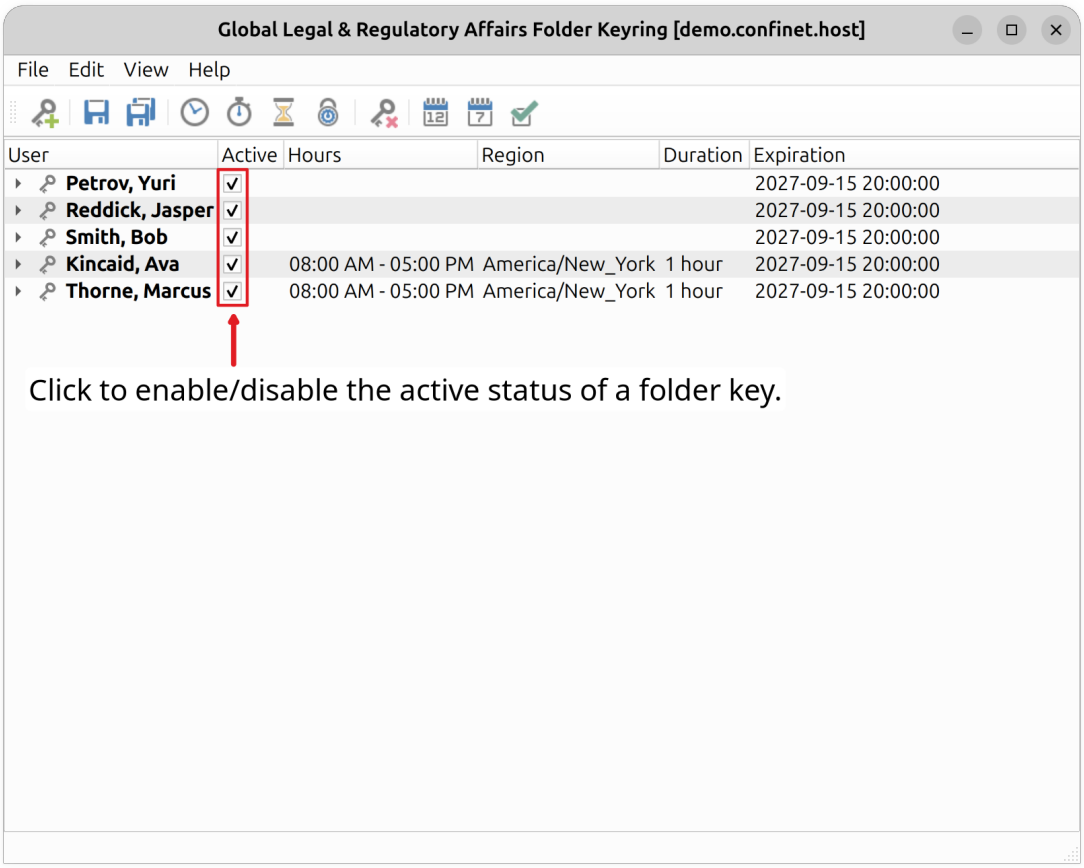


Figure 9.18: Updating the active status of a folder key

To update the active status of a folder key: *(See Figure 9.18)*

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**.

9.4.3 Updating the active months of a folder key

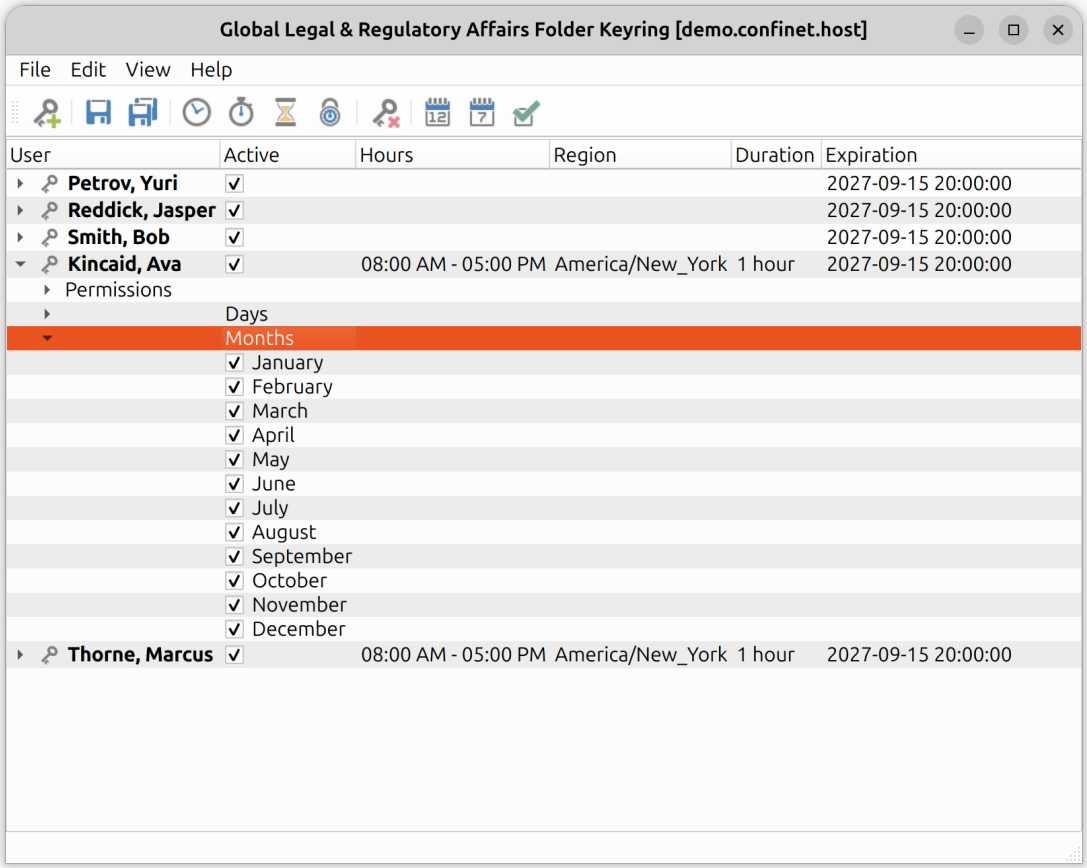


Figure 9.19: Updating the active months of a folder key

(See Figure 9.19) 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**.

9.4.4 Updating the active days of a folder key

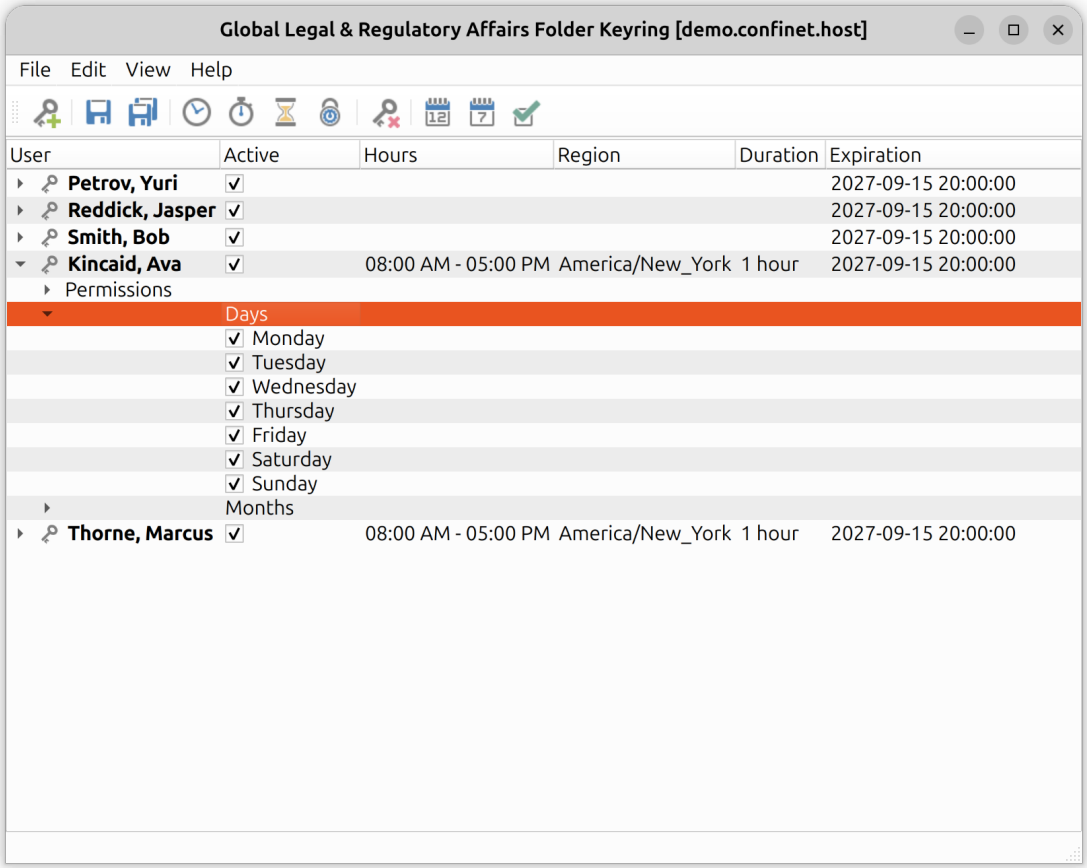


Figure 9.20: Updating the active days of a folder key

To update the active days of a folder key: *(See Figure 9.20)*

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**.

9.4.5 Updating the active hours of a folder key

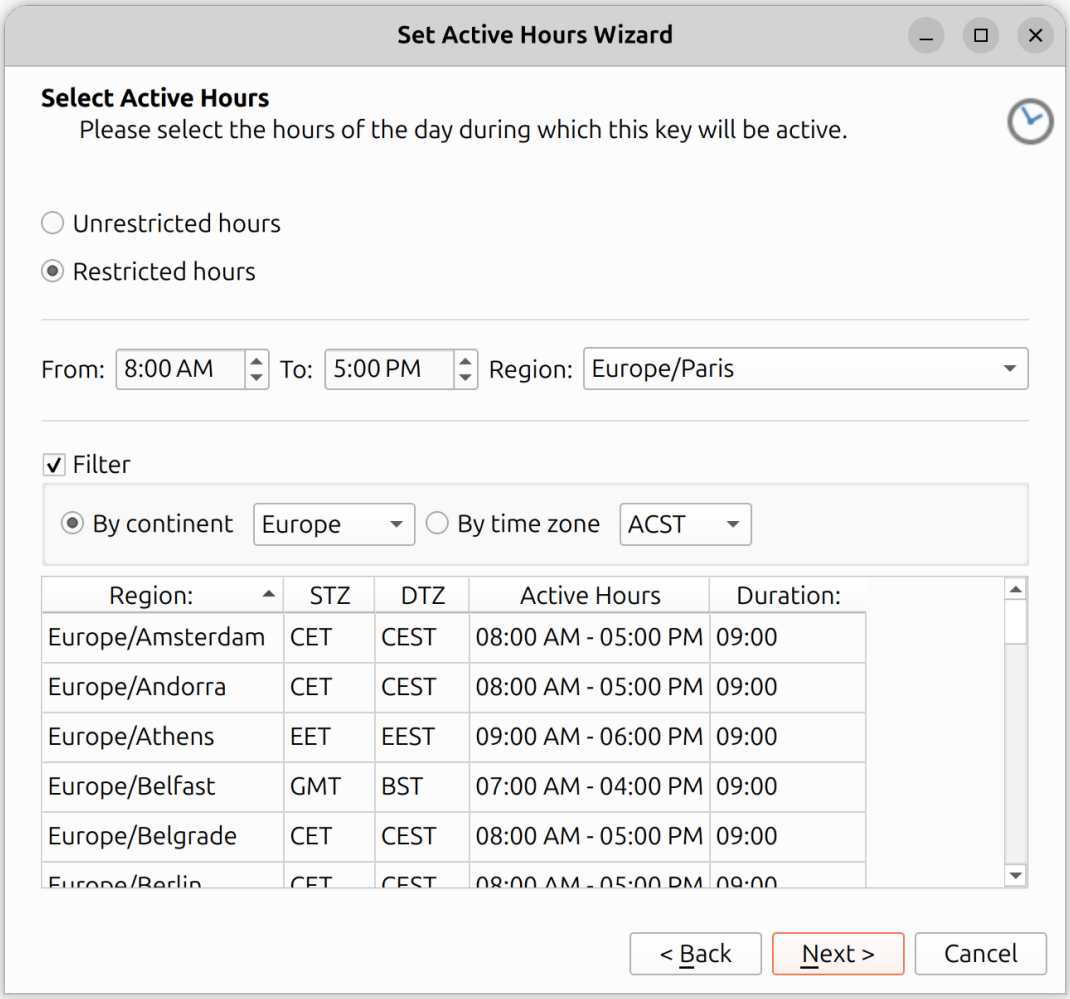


Figure 9.21: Updating the active hours of a folder key

(See Figure 9.21) 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**.

9.4.6 Updating the session duration of a folder key

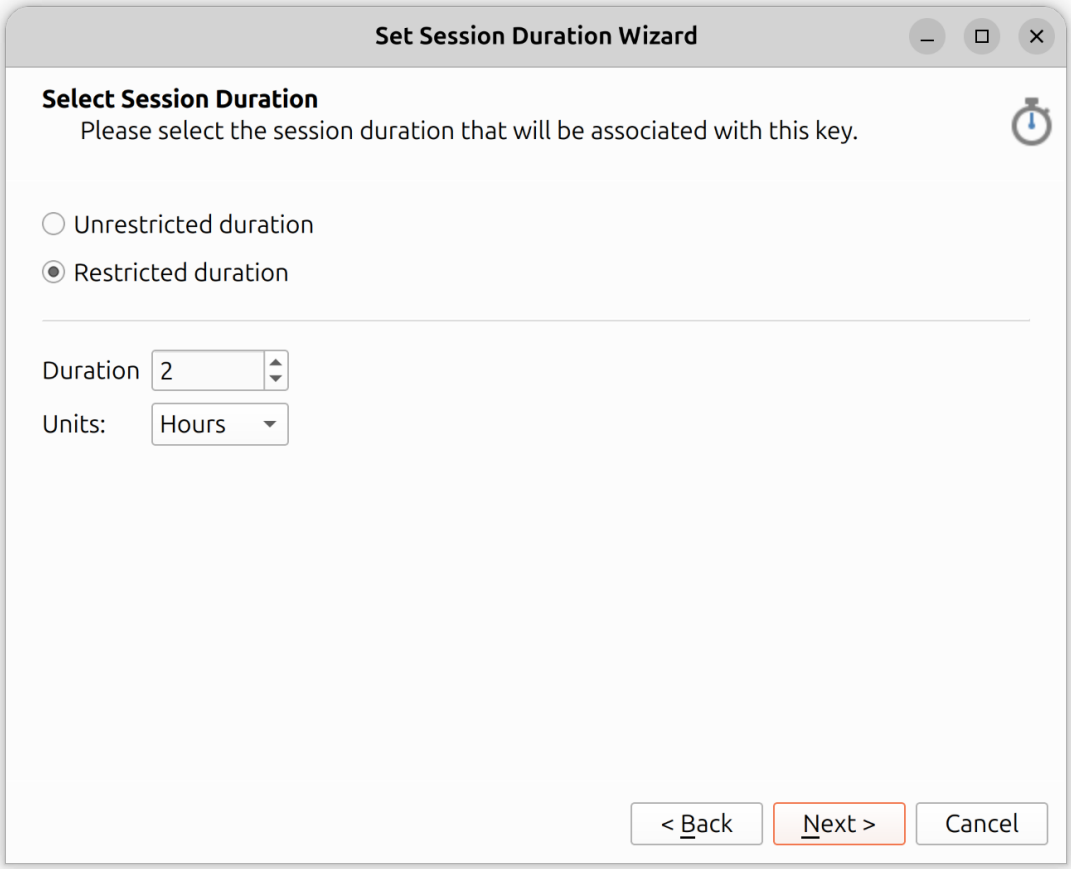


Figure 9.22: Updating the session duration of a folder key

To update the session duration of a folder key: *(See Figure 9.22)*

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**.

9.4.7 Updating the expiration date of a folder key

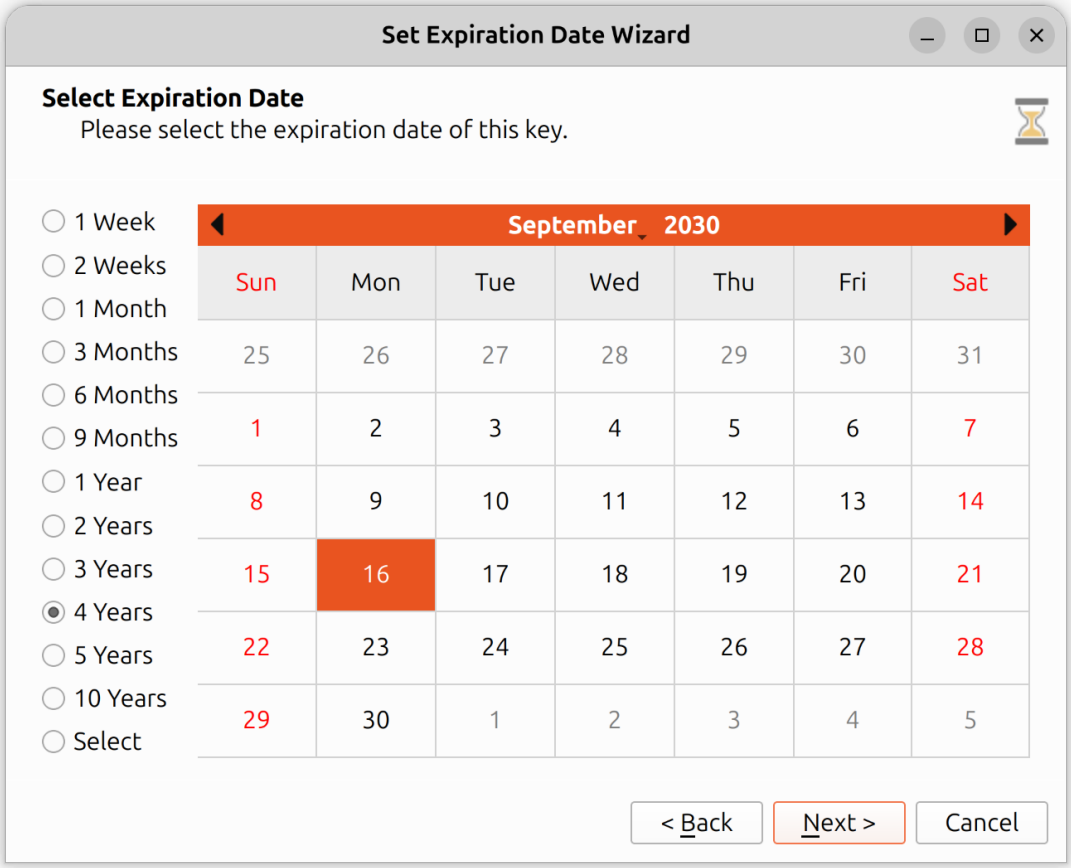


Figure 9.23: Updating the expiration date of a folder key

To update the expiration date of a folder key: *(See Figure 9.23)*

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**.

9.4.8 Updating the passcode of a folder key

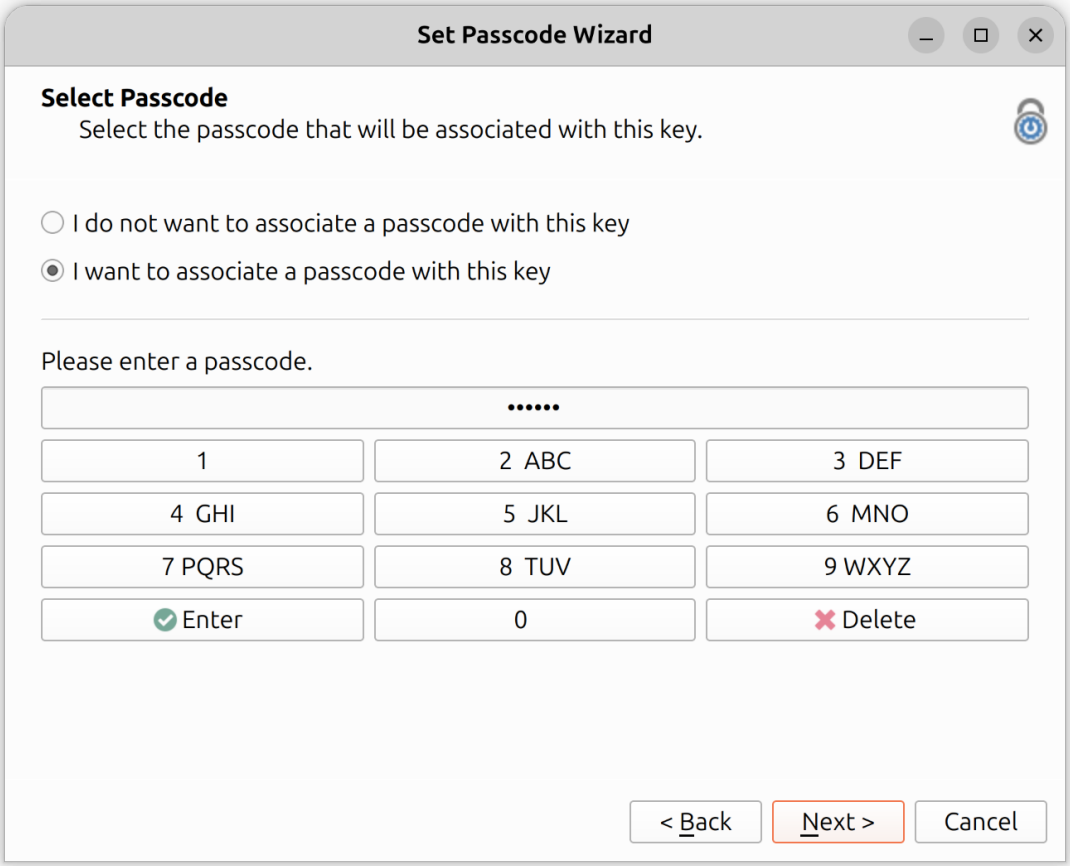


Figure 9.24: Updating the passcode of a folder key

(See Figure 9.24) 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**.

9.5 Deleting folder keys

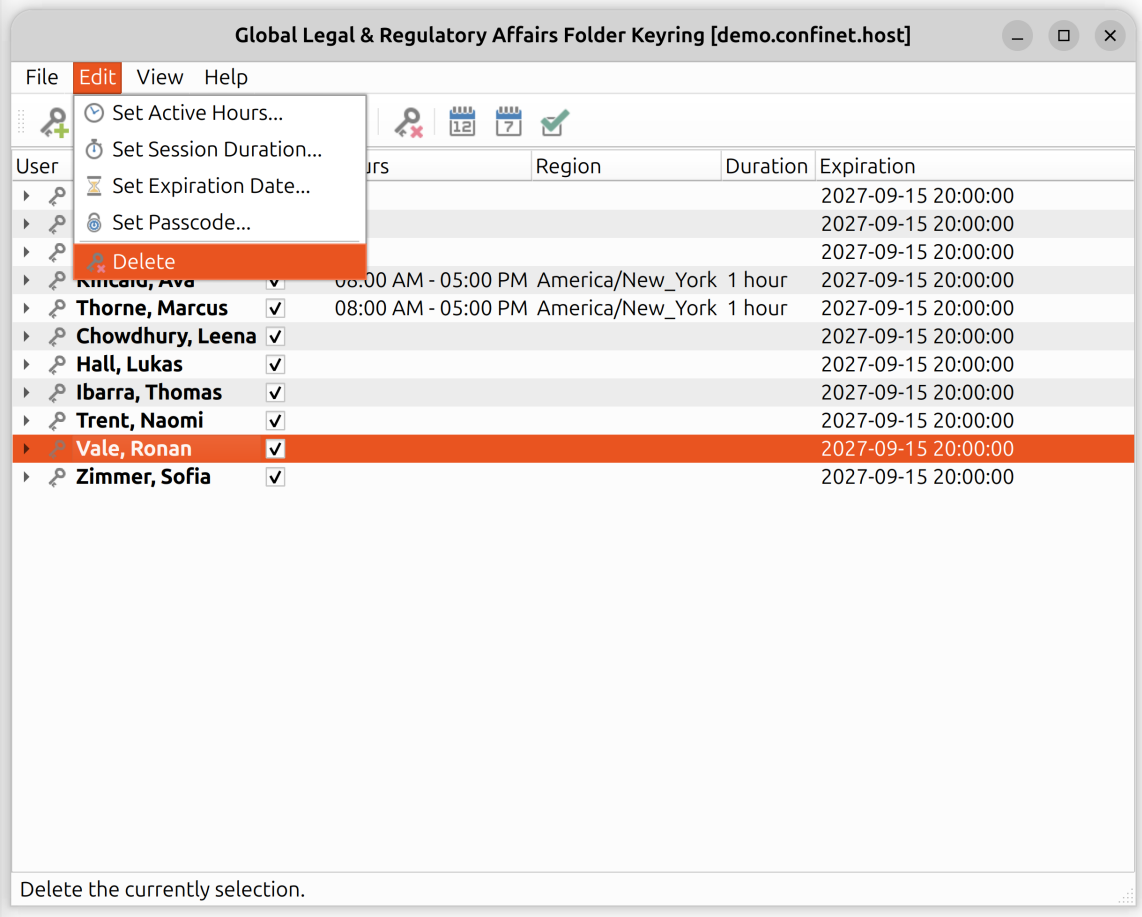


Figure 9.25: Deleting a folder key

(See Figure 9.25)

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 10

Messages

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

10.1 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.

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

10.1.1 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 *viewed*	lossless
Allow the contents of the message to be *copied to the clipboard*	**lossy**
Allow the contents of the message to be *exported to a text file*	**lossy**
Allow the contents of the message to be *exported to a PDF file*	**lossy**
Allow the contents of the message to be *printed*	**lossy**
Allow the contents of the message to be *searched*	lossless

Table 10.1: 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.

10.1.2 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 10.2: 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.

10.2 Creating messages

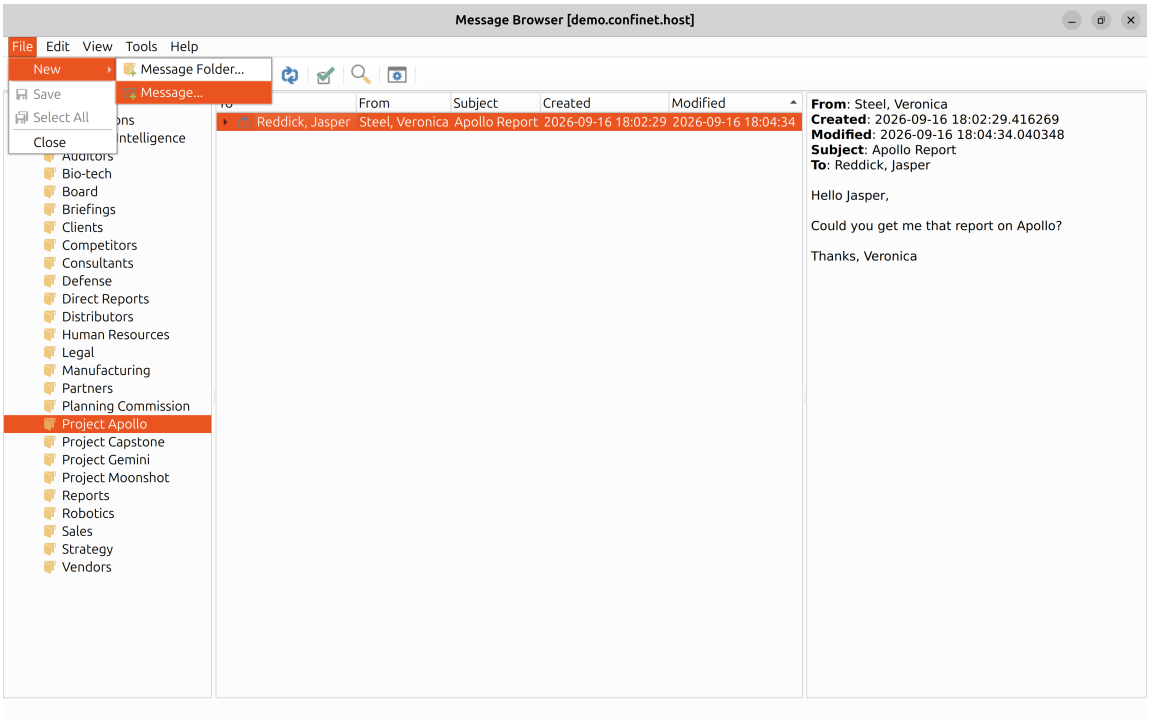


Figure 10.1: Creating a message

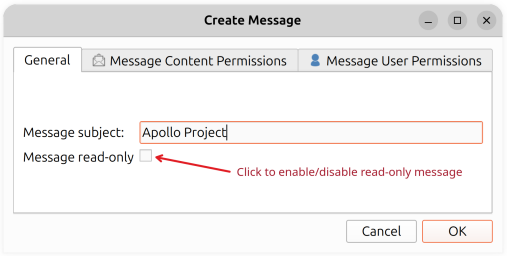


Figure 10.2: Create Message dialog

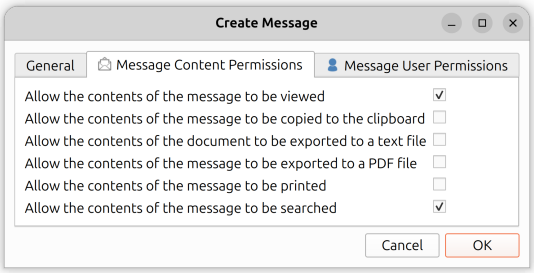


Figure 10.3: Message Content Permissions Tab

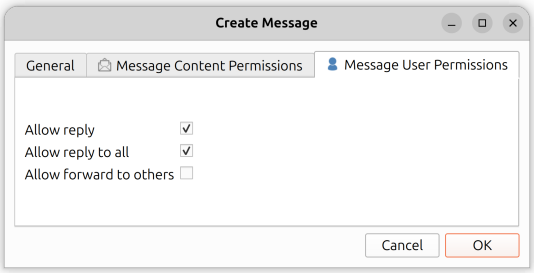


Figure 10.4: Message User Permissions Tab

You can create a message in a Message Browser window.

To create a new message:

(See Figures 10.1, 10.2, 10.3, 10.4, 10.7)

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.

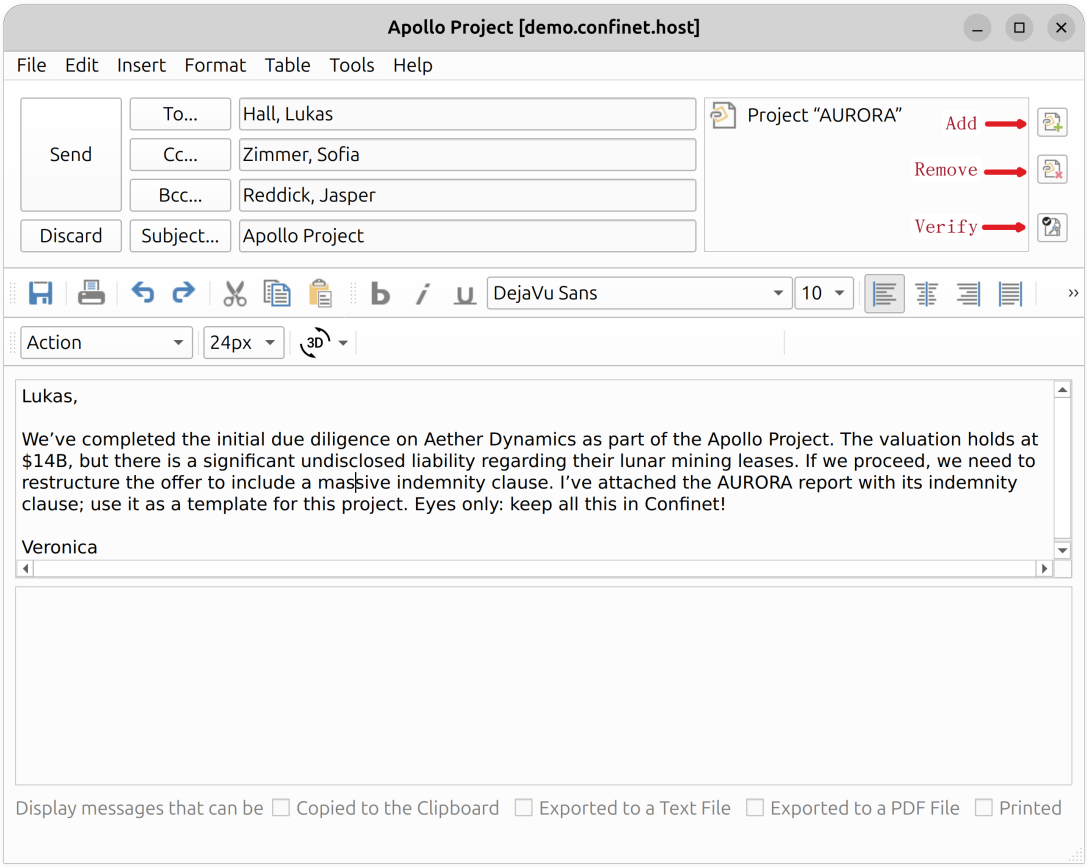


Figure 10.5: A new message

10.2.1 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]

10.2.2 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**.

10.2.3 Message attachments

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

(See Figure 10.5)

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.

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

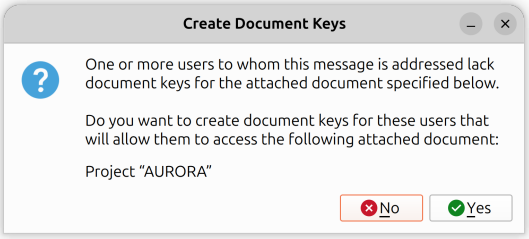


Figure 10.6: Create Document Keys dialog

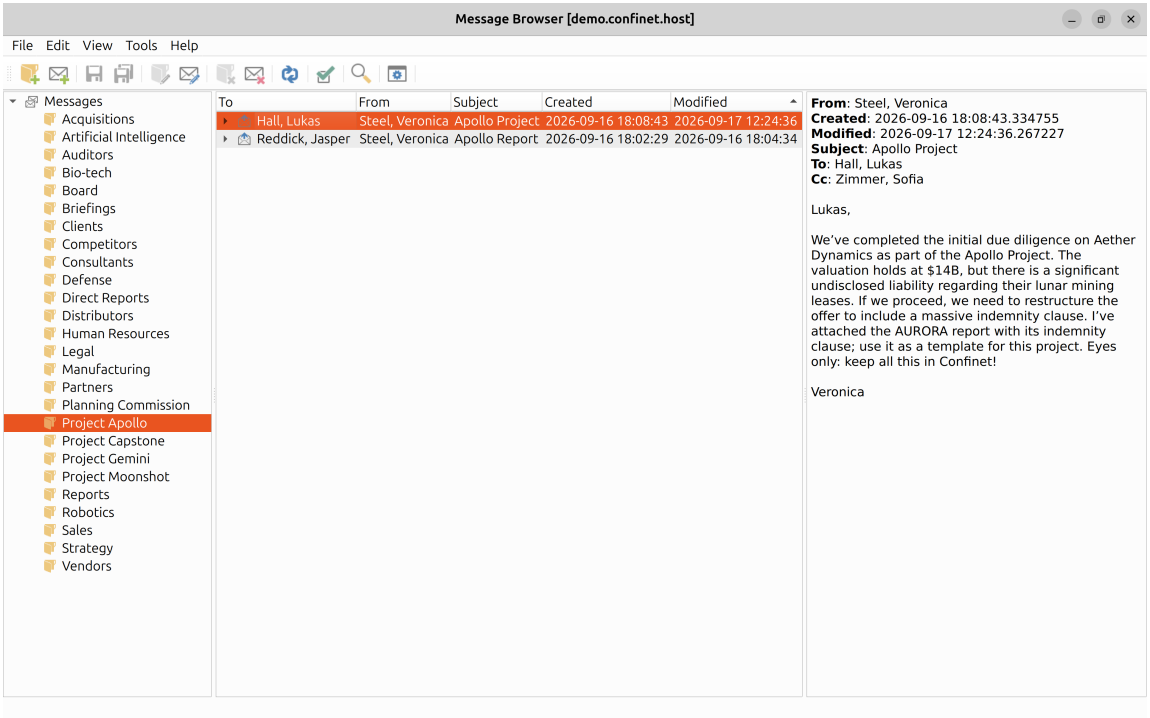


Figure 10.7: New message displayed in Message Browser window

10.3 Viewing and replying to messages

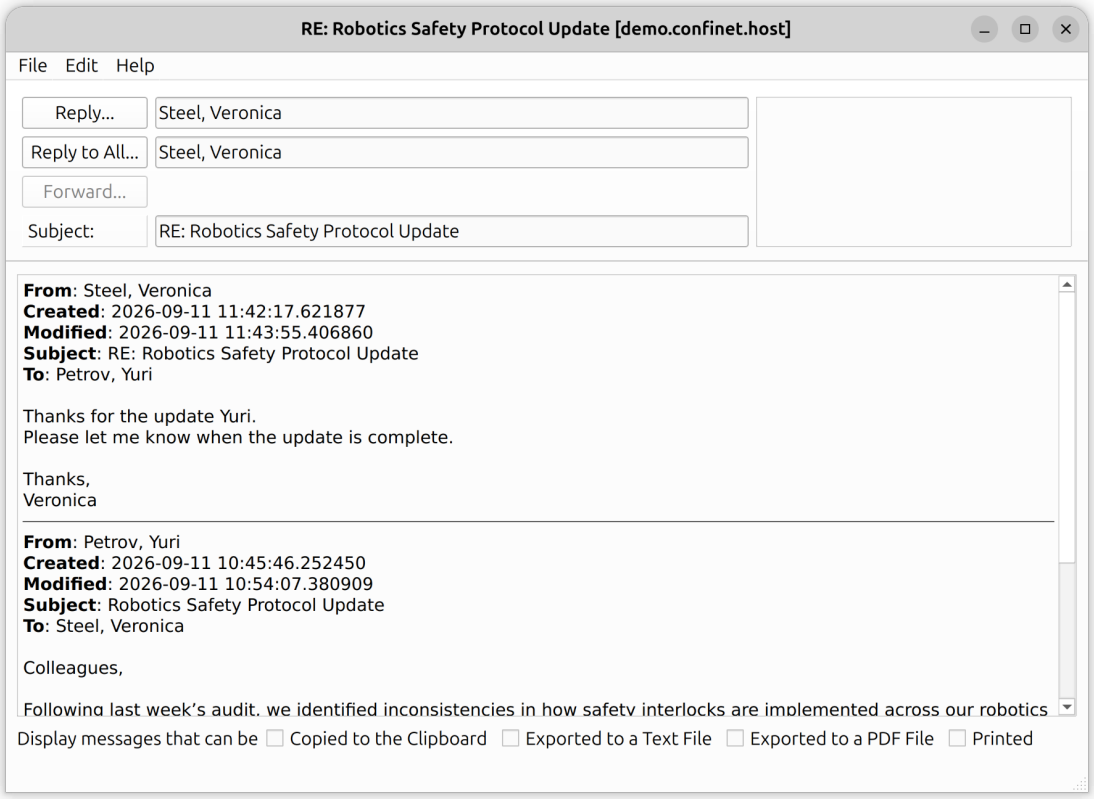


Figure 10.8: Message Reader window

10.3.1 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: *(See Figure 10.8)*

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

   ↪ The system displays the Message Reader window

10.3.2 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]

10.3.3 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.

---

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

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

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

[6] The *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.

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:

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 10.3: 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]However, 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.

10.4 Editing messages

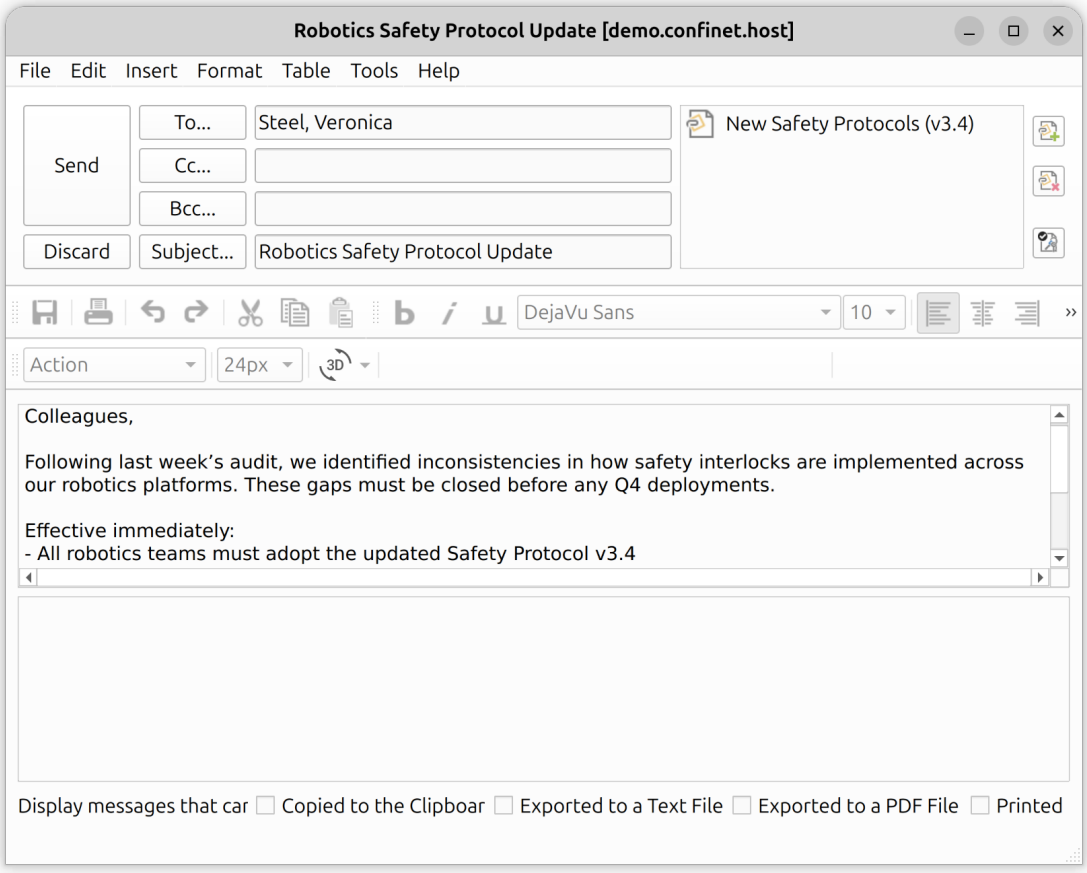


Figure 10.9: Message Editor window

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: *(See Figure 10.9)*

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

   ↪ The system displays the Message Editor window

10.4.1 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.

10.4.2 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.

10.4.3 Editing message permissions

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

[8] The 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).

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

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.

10.4.4 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.

10.5 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.

10.5.1 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.

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

10.6 Searching messages

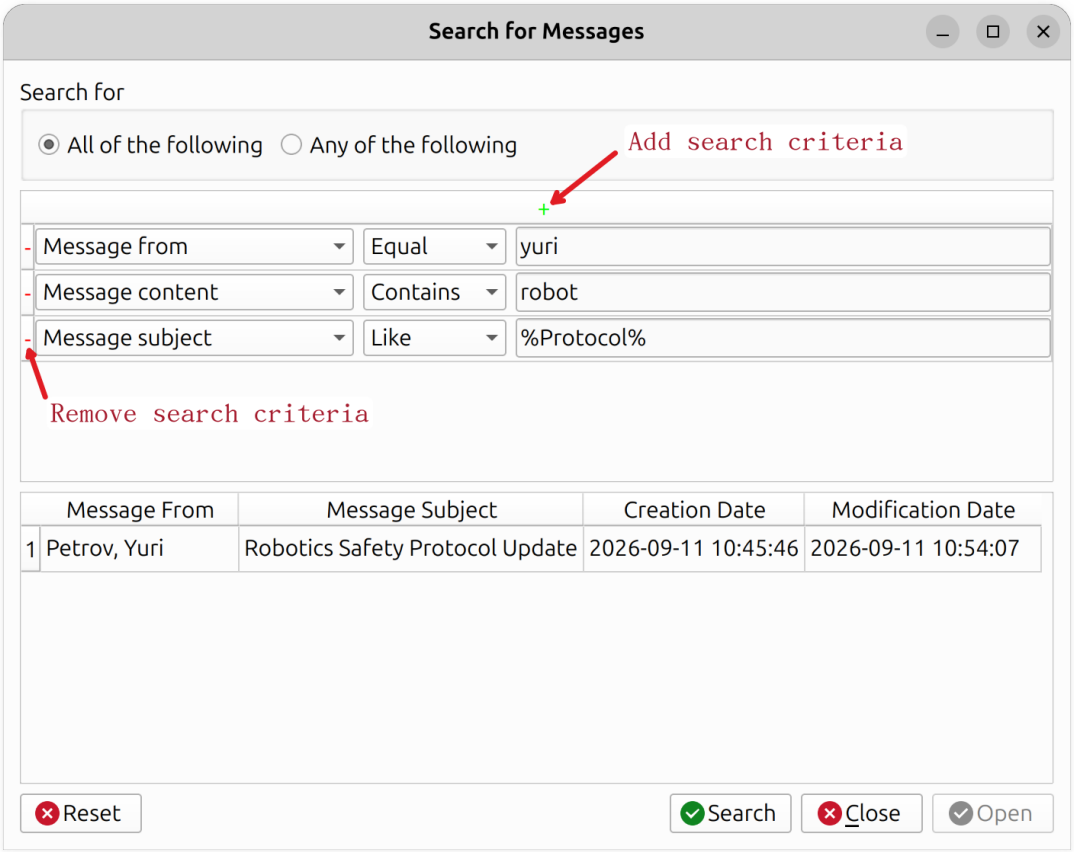


Figure 10.10: Search for Messages dialog

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.

(See Figure 10.10) To search for messages:

1. From the **Edit** menu, click **Search Messages**.

   ↪ The system displays the Search for Messages dialog

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**.

10.7 Message folders

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

10.7.1 Creating, renaming, and deleting message folders

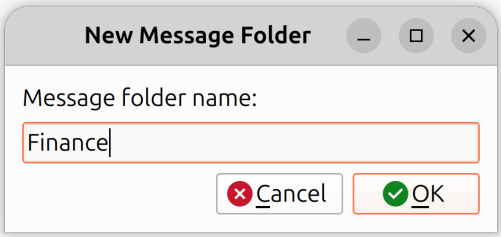


Figure 10.11: New Message Folder dialog

(See Figure 10.11) 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.

Part III

User Groups and Picture Directories

Chapter 11

Home Groups and Personal Groups

A group is a collection of users with Confinet accounts.

11.1 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.

11.2 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.

11.2.1 Creating a personal group

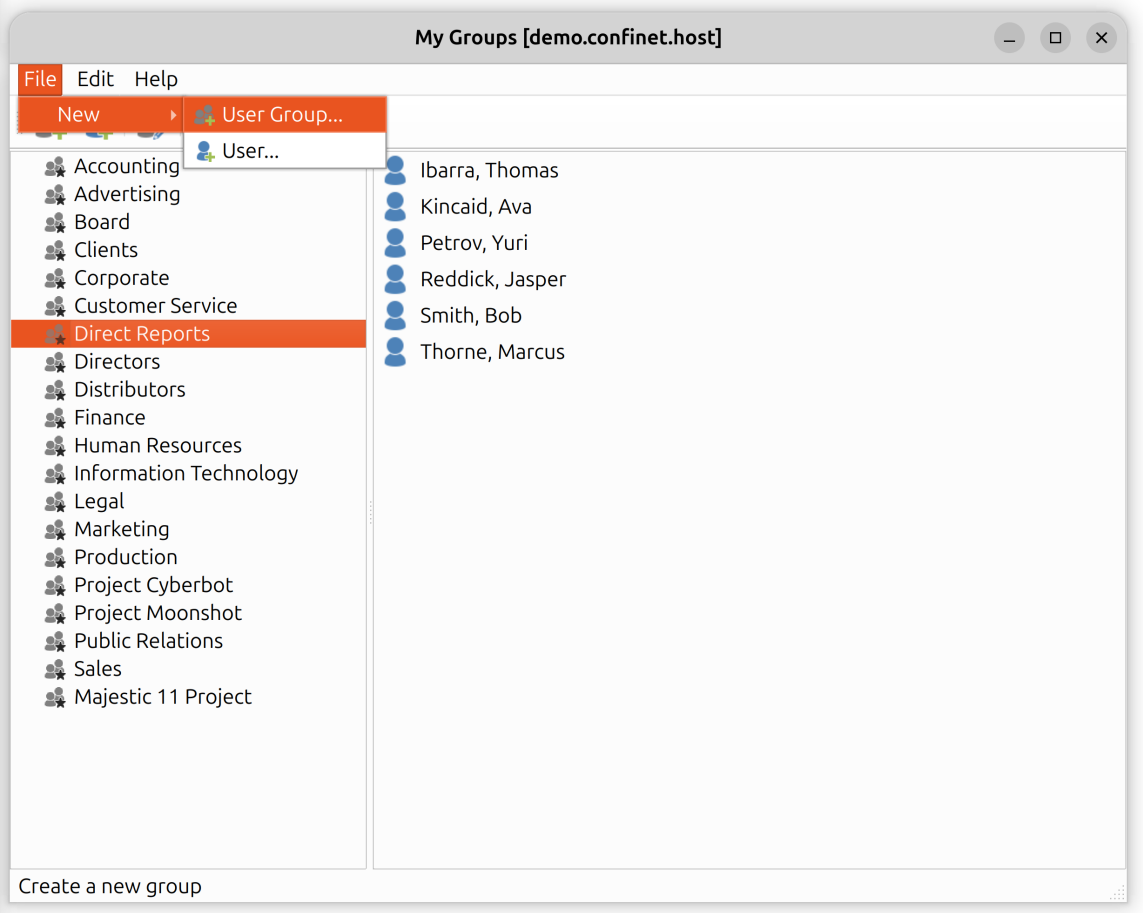


Figure 11.1: Creating a new group

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

(See Figures 11.1, 11.2)

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.

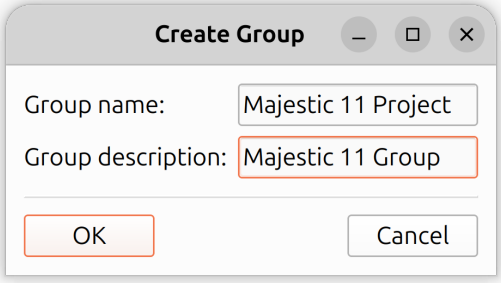


Figure 11.2: Create Group dialog

3. In the **Group description** field, enter a description for the group.
4. To create the new group, click **OK**.

11.2.2 Adding a user to a personal group

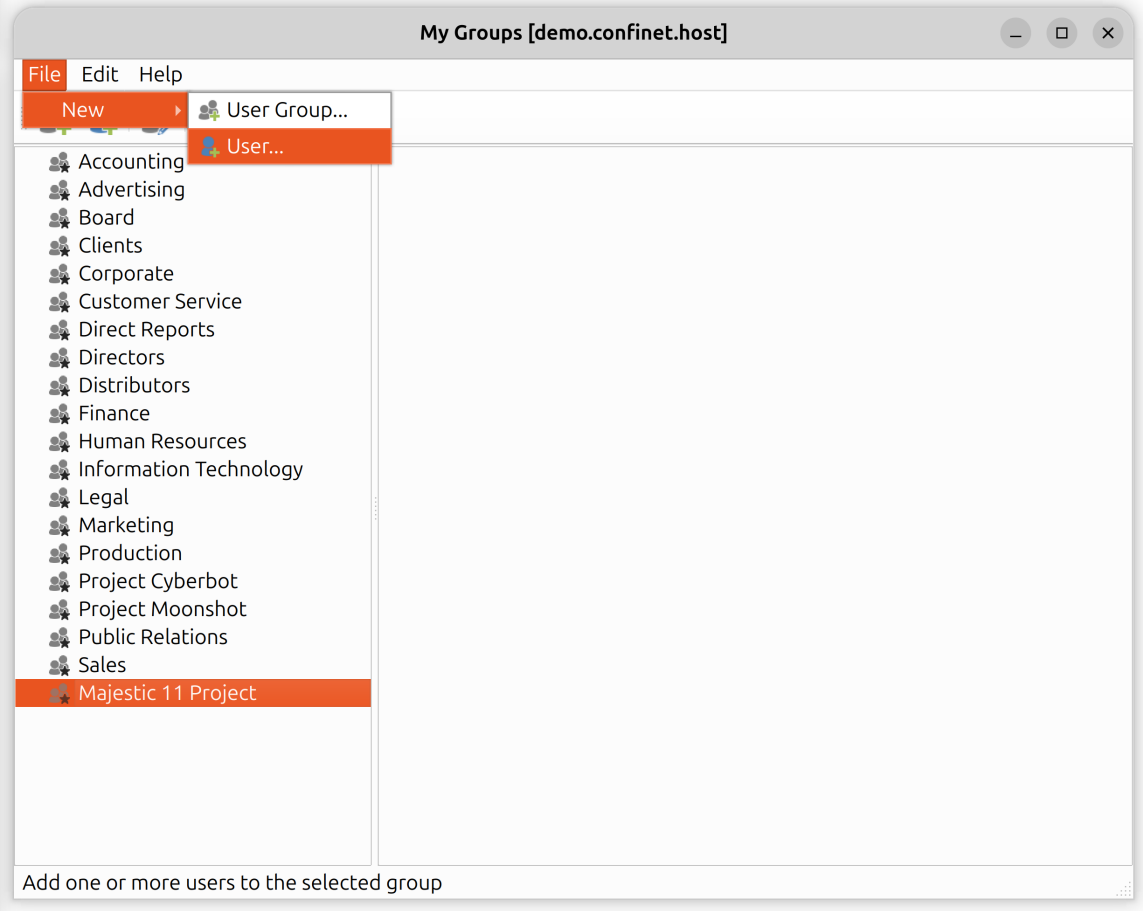


Figure 11.3: Creating a new group user

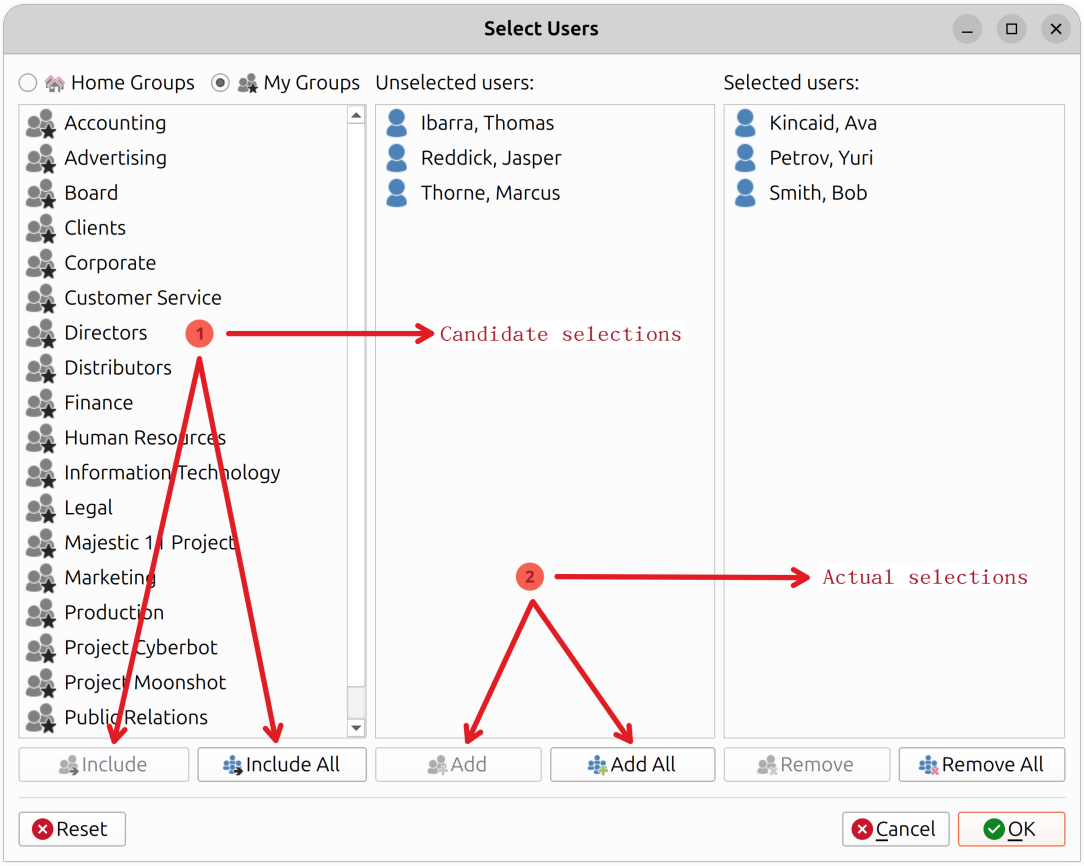


Figure 11.4: Select Users dialog

To add users to a personal group:

(See Figures 11.3, 11.4)

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]

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

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**.

11.2.3 Removing a user from a personal group

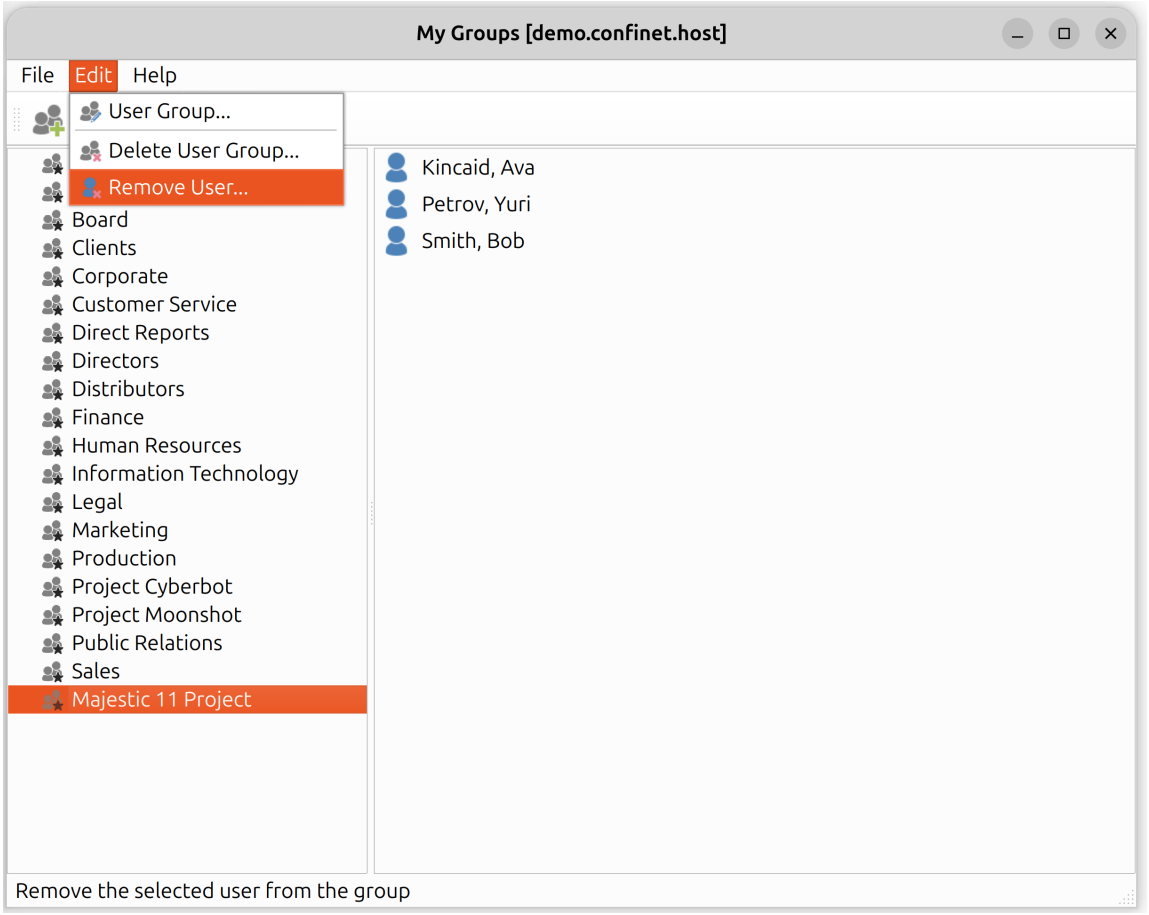


Figure 11.5: Removing a user

(See Figure 11.5) 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**.

11.2.4 Deleting a personal group

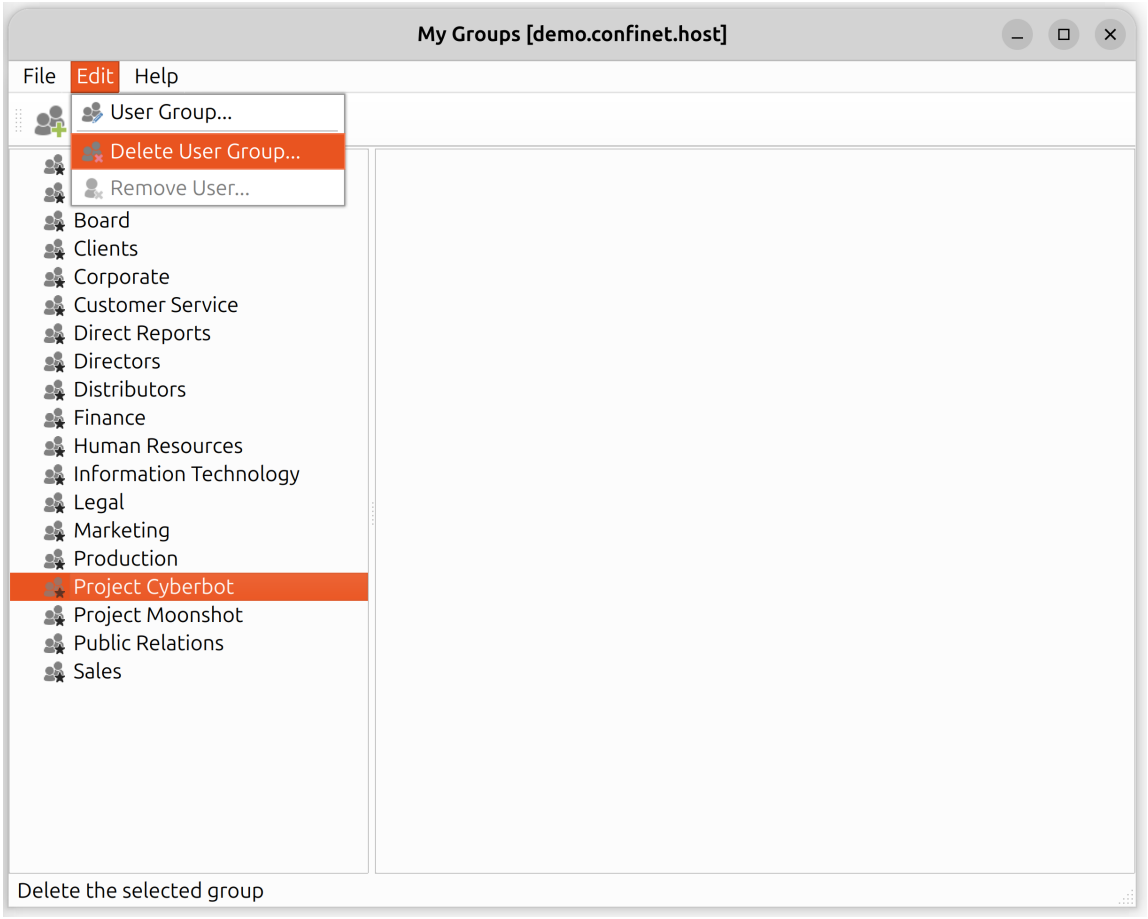


Figure 11.6: Deleting a personal group

To delete a personal group: *(See Figure 11.6)*

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**.

Chapter 12

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.

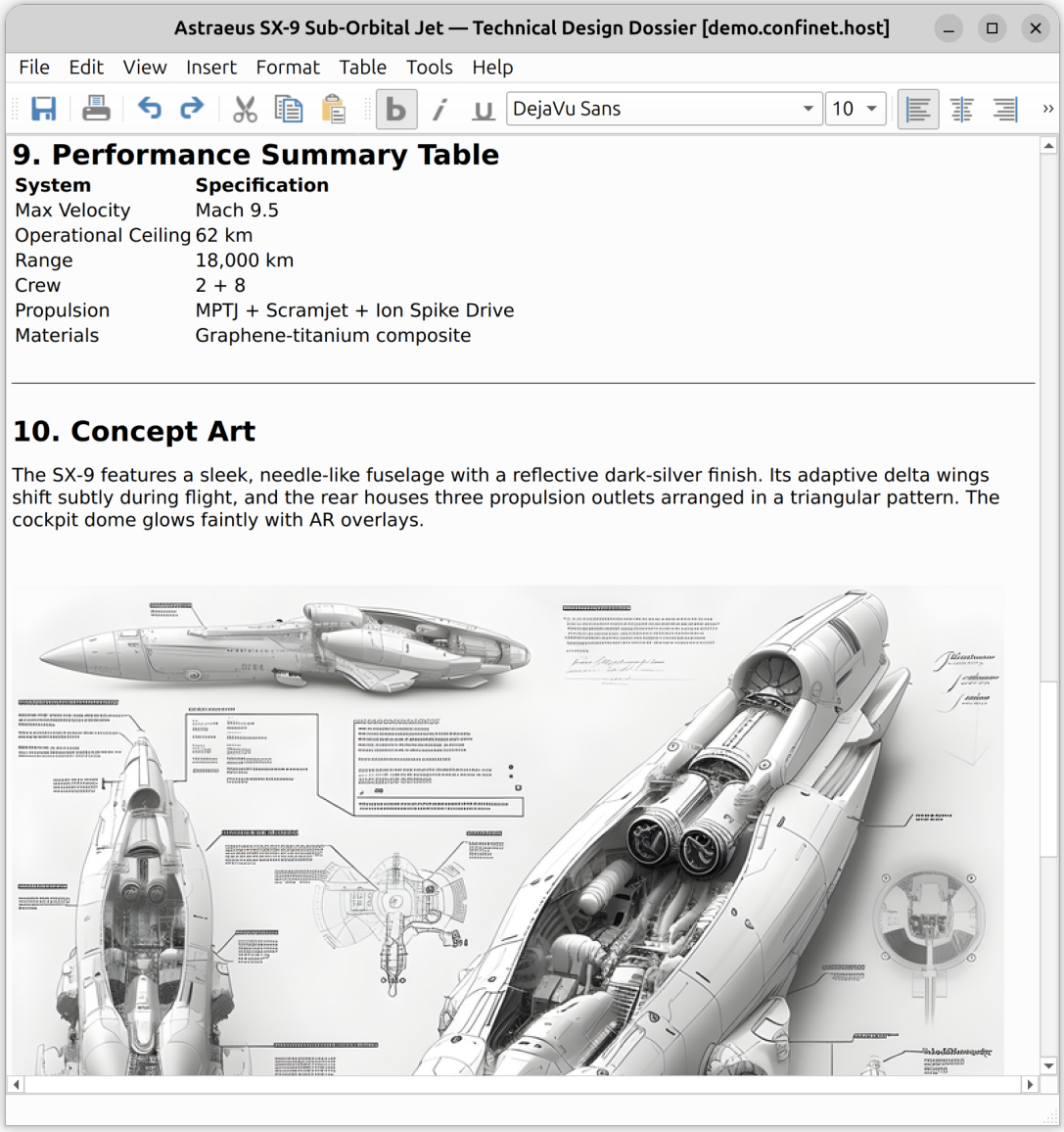


Figure 12.1: A document containing an image

12.1 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 12.1: Supported image formats

12.2 Picture references

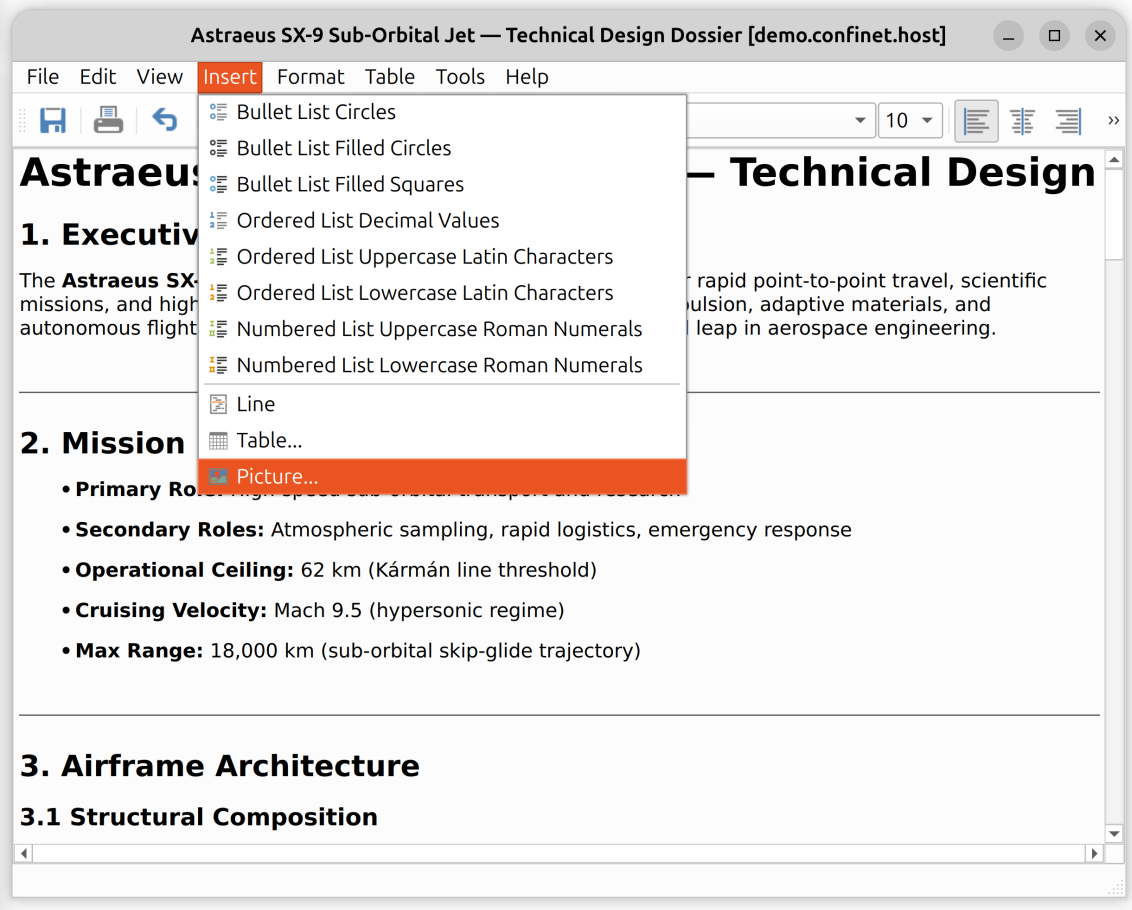


Figure 12.2: Inserting a picture

(See Figure 12.2)

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**.

12.3 Picture directories

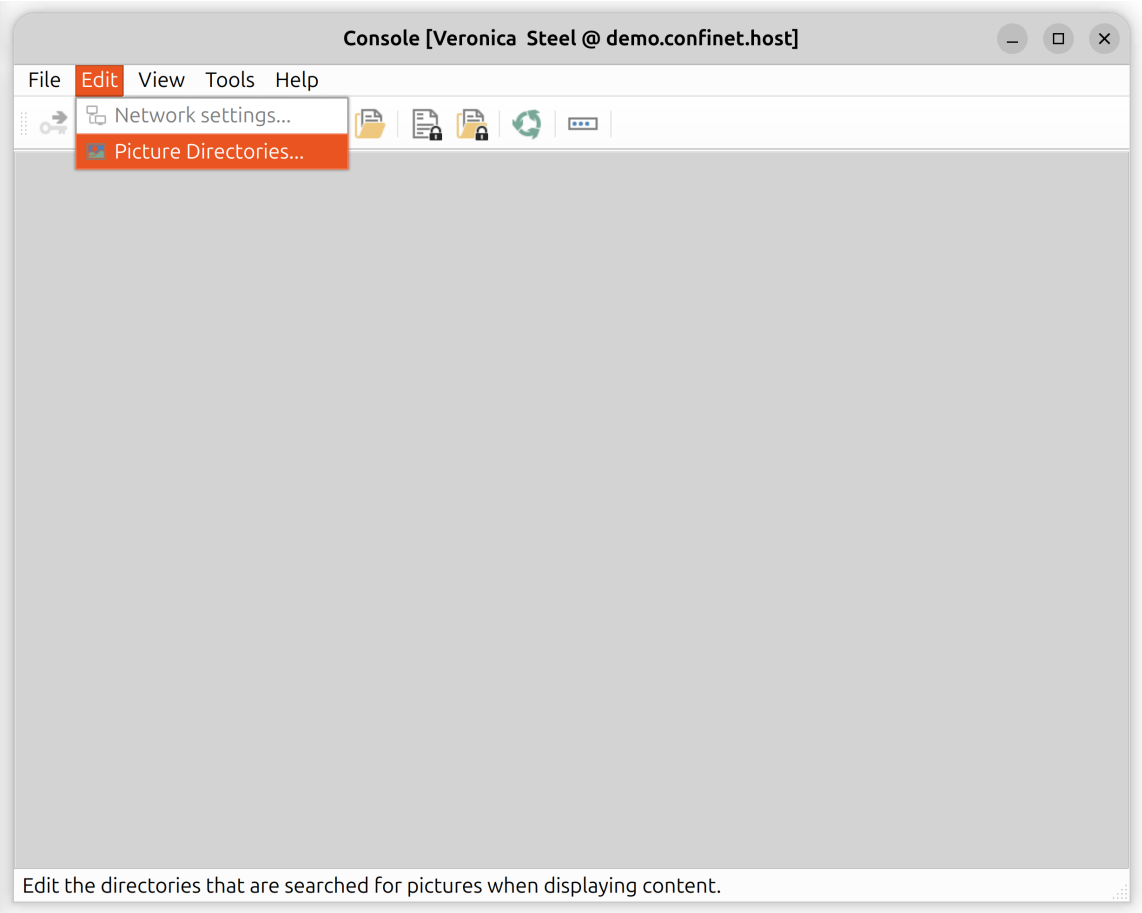


Figure 12.3: Displaying picture directories

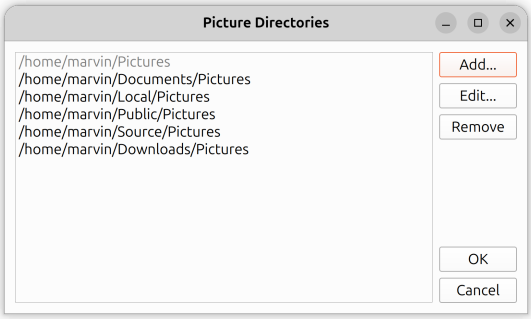


Figure 12.4: Picture Directories dialog

(See Figures 12.3, 12.4)

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.

Part IV

Appendix

Appendix A

FAQ

A.1 General

1. What is Confinet?

Confinet[1] is a software product suite that gives the members of an organization everything they need to create, manage, protect, and share confidential information and intellectual property. It can also be used to share information with individuals outside the organization, such as partners, clients, customers, consultants, vendors, distributors, attorneys, auditors, and anyone else you need to share sensitive information with.

2. What does Confinet let me do?

Confinet lets you create documents and messages that you can share via access controls. These controls give you precise control over *who* information is shared with, *how* it is shared, and *when* it is shared.

3. How does Confinet eliminate spam?

Confinet provides your organization with a confidential network. *Only individuals with a Confinet account can communicate with the members of your organization via Confinet.* Traditional email, by contrast, allows *anyone* to send you spam from *anywhere*.

4. How does Confinet protect me from malware that uses email as an attack vector?

[1] The name *Confinet* is a portmanteau of **confi**dential **net**work.

Email is one of the most common attack vectors used to infect computers with malware; however, Confinet does not rely on traditional email to create, manage, or share information.

5. Why does it matter that Confinet is a self-contained product suite?

Information is only as secure as the *least* secure application that handles it. Confinet does not require any untrusted, third-party applications, so information is protected consistently, from its creation to its dissemination to authorized users. This design also reduces cost, since only a single product suite is needed.

6. Is my information encrypted when it is sent over a network?

Yes. Confinet features *always-on* encryption using standard cryptographic protocols. This applies to both public and private networks, since a private network could be compromised by an insider.

7. How does Confinet improve productivity?

You can update the content and permissions of documents you have shared with others at any time. In addition, you can also update the content and permissions of a message at any time, even after you have sent it; you can even add or remove recipients at any time.

8. Are messages only for sending to other people?

Normally, yes, but not always. A message can also serve as a note, or as a means of binding together an arbitrary collection of documents.

A.2 Installation

9. Which operating systems are supported?

The Confinet Client can be installed on the following operating systems:

- **Windows:** Windows 10 and Windows 11.
- **macOS:** Sonoma, Sequoia, Tahoe, and Golden Gate.
- **Linux:** Red Hat Enterprise Linux, Oracle Linux, AlmaLinux, and Ubuntu.

10. My Linux distribution is not listed. Can I still use the Confinet Client?

Yes. The Confinet Client can be built and installed on any modern version of Linux, including custom versions. Contact us if you want us to build Confinet for the version of Linux that *you* use.

11. What if I need administrator privileges to install the Confinet Client?

Please seek the assistance of your System Administrator.

12. Where do I download the installation file?

Unless your organization has instructed you otherwise, download the latest version from the Confinet website (`www.confinet.us`).

13. How can I verify the integrity of a Confinet installation file?

Compute the SHA-256 hash value of the installation file and compare it with the value posted on the Confinet website.

A.3 Configuration and Logging On

14. What should I do first after installing the Confinet Client?

First configure your network settings, and then log on. After you log on, set your user options to enable email notifications and multi-factor authentication (MFA).

15. What is in the Confinet Account Creation Notification?

This email notification provides your user name, user password, Confinet server name, and Confinet server port. You enter the user name and password in the Log On dialog, and the server name and port in the Network Settings dialog.

16. How do I configure my network settings?

Follow these instructions:

1. In the Console window, open the **Edit** menu and click **Network Settings**.
2. Set the **Server name** and **Server port** to the values given in your account creation notification email.

3. Set the **Default time zone** to your time zone.
4. Click **OK**.

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

17. How do I log on?

Follow these instructions:

1. In the Console window, open the **File** menu and click **Log On**.
2. Enter your **User name** and **User password**.
3. Click **OK**.

18. Will Confinet remember my password?

No. For your security, Confinet will *not* save your password on your device.

19. How do I get an email notification when someone shares a document or message with me?

In the Console window, open the **Tools** menu and click **Options** to display the User Options dialog. Then select **Notify me when a user shares a document with me**, **Notify me when a user shares a message with me**, or both. Click **Save**.

20. How do I reset my password?

Use the Reset Password wizard, available from the Console window. You can reset your password at any time.

21. Can I change my user name?

Not yourself; however, a Confinet Administrator can reset your user name upon request.

A.4 The Confinet Security Model

22. What are the core principles of the Confinet Security Model?

They are the following:

1. Information is never shared by default.
2. Information content can be dynamically updated at any time.
3. Information security permissions can be dynamically updated at any time.
4. Information is never automatically stored on a user's device.
5. Information in transit is encrypted in accordance with standard cryptographic protocols.
6. Information can be created, managed, shared, and protected within a single product suite.

23. Will Confinet ever share my information automatically?

No. You must explicitly share any information you create. The rationale is accountability: individuals cannot be held accountable for the security of information that can be shared without their knowledge or consent.

24. What program do Confinet Administrators use to manage Confinet groups and users?

Confinet Administrators use the Confinet Administrator program to manage Confinet groups and users.

25. Can Confinet Administrators read my documents and messages?

No. The Confinet Administrator program does *not* give Confinet Administrators access to information created by Confinet users; its only purpose is to administer Confinet groups and users.

26. Is my data stored on my computer?

No. The Confinet Client never automatically stores or caches user information on persistent storage devices; this protects against the loss or theft of those devices. Your data is stored in a database on a secure server.

27. Why can permissions be changed after information has been shared?

Both the classification of information and the roles of the people who handle it change over time. Information that was confidential yesterday may be non-confidential today, and vice versa; likewise, access often depends on job titles and projects, which may also change.

28. What are the basic concepts of the Confinet Security Model?

There are eight: user, group, document, message, folder, document key, folder key, and group key.

29. What is a group key?

A group key grants a user access to the members of a group. The Confinet Administrator creates, manages, and administers group keys.

30. Are changes to documents and messages recorded?

Yes. History tables record all changes to document and message records. As a result, you cannot repudiate previous versions of a document or message you have shared with others.

A.5 Client Windows

31. What are the main windows of the Confinet Client?

- Console window
- My Groups window
- Message Browser window
- Message Editor window
- Message Reader window
- Document Browser window
- Document Editor window
- Document Reader window
- Document Keyring window
- Folder Keyring window
- My Document Keyring window
- My Folder Keyring window

32. What can I do from the Console window?

You can do the following:

- Log on.
- Set network settings and picture directories.
- Open the My Groups, Message Browser, Document Browser, My Document Keyring, and My Folder Keyring windows.
- Restore a deleted document with the Restore Document wizard.
- Reset your password with the Reset Password wizard.
- Set user options.

33. What is the difference between the Document Editor and the Document Reader?

The Document Editor window is where you view, edit, format, spell-check, export, print, and view the revisions of your own documents. The Document Reader window opens documents created by another user for which you hold a document key; every task it offers depends on the permissions of that document key.

34. What is the difference between the Message Editor and the Message Reader?

The Message Editor window is for messages you have created: you select recipients, attach documents, edit content, and verify document keys for recipients. The Message Reader window is for messages created for you: viewing, exporting, printing, copying, replying, forwarding, and opening attachments all depend on the message's permissions.

A.6 Documents

35. How do I create a document?

Follow these instructions:

1. In a Document Browser window, open the **File** menu, click **New**, and then click **Document**.

2. Enter a name in the **Document name** field and a description in the **Document description** field.
3. Click **OK**.

36. How do I rename or delete a document?

In a Document Browser window, select the document and open the **Edit** menu. Then either click **Rename**, enter the new name, and click **OK**; or click **Delete** and click **OK** to confirm.

37. What formatting options are available?

The Formatting toolbar lets you:

- apply bold, italic, and underlining
- set the font name, font size, and text color
- align text flush left, centered, flush right, or justified
- increase or decrease indentation

38. What list styles can I use?

Eight styles are available:

- bullet lists with circles, filled circles, or filled squares
- ordered lists with decimal values, uppercase Latin characters, or lowercase Latin characters
- numbered lists with uppercase or lowercase Roman numerals

Insert a list from the **Insert** menu, or format existing text from the **Format** menu. To remove list formatting, click **No Text List**.

39. How do I insert and modify a table?

From the **Insert** menu, click **Table**. Set the alignment, cell padding, cell spacing, rows, columns, and column widths, and then click **OK**. Afterward, use the **Table** menu to insert or delete rows and columns and to set column widths.

40. Can I insert lines, pictures, or icons?

Yes. From the **Insert** menu, click **Line** to insert a line, or **Picture** to insert a *reference* to a picture file. You can also insert icons selected from standard icon sets (actions, alerts, audiovisual, and so on).

41. How do I find or replace text?

From the **Edit** menu, click **Find** or **Replace**. You can search forward or backward, choose case-sensitive or case-insensitive matching, and optionally match only complete words. Then click **Find** or **Find All**, or **Replace** or **Replace All**.

42. How do I check spelling?

From the **Tools** menu, click **Check Spelling**. In the Spell Checker dialog, use **Ignore**, **Ignore All**, **Change**, **Change All**, or **Add to Dictionary**. Click **Close** when you are done. Add words to your personal dictionary if desired.

43. Is my personal dictionary stored on my device?

No. User-defined words, especially acronyms and abbreviations, could give an adversary information from which sensitive information could be inferred, such as the names or nature of classified projects or products.

44. How do I view previous revisions of a document?

From the **View** menu, click **Revision History for** *document name*, and then click a revision date to view that revision's contents. You can view any revision of any document you have created.

45. How do I print or preview a document?

From the **File** menu, click **Print**, select a printer, and click **Print**. To preview first, click **Print Preview** instead.

46. How do I export a document?

From the **File** menu, click **Export to Text File** or **Export to PDF File**.

47. I deleted a document by mistake. Can I get it back?

Yes. In the Console window, open the **Tools** menu and click **Restore Document**. In the Restore Document wizard:

1. Specify the date range during which the document was deleted.
2. Select the document and, optionally, the revision to restore.
3. Click **Finish** to restore the document.

By default, the latest revision of the document is restored to its original folder. If that folder has been deleted, you will be given the option to select an existing folder.

48. Can I attach web links to a document?

Yes, but only secure (`https`) URLs. For example, `http://foo.com` would not be allowed, while `https://foo.com` would be. Supported links include standard web pages; OneDrive, SharePoint, Google Docs, and Box cloud documents; media and video links; and image links.

49. How do I view and manage a document's URL attachments?

From the **View** menu, click **View URL Attachments for** *document name*. To display them by default: from the **Tools** menu, click **Options** and enable **Display by Default**. Use the **Open URL**, **Add URL**, **Edit label**, and **Remove URL** buttons to manage them; you can also drag and drop a URL into the URL attachments window pane.

A.7 Sharing Documents

50. What is a document key?

A document key allows the owner of a document to share it securely with another user, the *document key holder*. A document key is associated with:

- a document
- a document key holder
- a set of permissions
- a set of attributes
- a status, which is either active or inactive

51. What happens when a document key is inactive?

The document key holder cannot view the contents of the document (unless the holder had already opened the document before the key became inactive).

52. What permissions can a document key grant?

It can grant any of the following:

- **Lossless:** view, update, copy from the clipboard, and search
- **Lossy:** copy to the clipboard, export to a text file, export to a PDF file, and print

53. What is the difference between lossy and lossless permissions?

Lossy permissions give document key holders an *explicit* means of easily conveying the contents of a document to others without your knowledge or authorization. Lossless permissions do not.[2]

54. Can Confinet prevent screen captures?

No. Nothing can prevent a bad actor from using screen capture utilities to steal confidential information. When handling confidential information, measures should be taken to make it a violation of policy to install or use such utilities.

55. What happens if the view or update permission is disabled?

If the view permission is disabled, every other permission is irrelevant and ignored. If the update permission is disabled, any other permission that would allow the document to be modified is ignored.

56. What attributes does a document key have?

A document key has the following attributes:

- active status
- active months of the year
- active days of the week
- active hours of the day
- session duration

[2]The terms are borrowed from data encoding technology.

- expiration date
- passcode
- document revision

57. What is a session duration?

A session duration, specified in minutes or seconds, limits how long the document can be displayed after the key holder opens it. When the session duration elapses, the document is automatically closed.

58. What does a passcode do?

The document key holder must enter the passcode before opening the document. Passcodes provide a defense against covert key loggers, since they are not entered via a keyboard.

59. What happens when a document key reaches its expiration date? Can I extend it?

The document key becomes inactive. The owner of the document can reset the expiration date to a later date at any time.

60. Can I share an older revision of a document instead of the current one?

Yes. For example, you can share the previous revision of a report while you are still updating it, and then set the document key to the current revision when you are finished.

61. How do I create a document key?

Follow these instructions:

1. In a Document Browser window, open the folder containing the document and then select the document.
2. From the **Edit** menu, click **Open Keyring**.
3. In the Document Keyring window, from the **File** menu, click **New** to start the Create Document Key wizard.
4. Step through the wizard: document revision, permissions, active status, active months, days, and hours, session duration, expiration date, passcode, users, and confirmation.

You can select users from your Home Groups or your personal groups. If you select more than one user, a document key is created for each based upon your selections.

62. What are the default settings for a new document key?

They default to the following:

- The latest revision of the document.
- The view and search permissions.
- Active status.
- Active during every month, on every day, and during every hour.
- No session duration limit.
- An expiration date one year from the current date.
- No passcode.

63. How do I see the document keys other users have created for me?

Follow these instructions:

1. In the Console window, from the **File** menu, click **New** and then **My Document Keyring**.
2. Optional: from the **View** menu, click **View Months**, **View Days**, or **View Permissions**.
3. Click the column headers to sort by document name, document owner, key creation date, or key expiration date.
4. To open a document, select its key and, from the **File** menu, click **Open Document**.

64. How do I update a document key?

In the Document Keyring window, select the document key, and then:

- **Permissions:** expand the key, expand **Permissions**, and select or clear check boxes.
- **Active status:** select or clear the check box in the **Active** column.
- **Active months or days:** from the **View** menu, click **View Months** or **View Days**, and select or clear the check boxes.

- **Active hours, session duration, expiration date, passcode, or document revision:** from the **Edit** menu, click the corresponding **Set** command and complete the wizard.

From the **File** menu, click **Save** to save your changes.

65. Why can't a document key holder search my document, even though search is enabled?

Searching also requires the holder to have a folder key for the folder containing the document, with the folder key's search permission enabled.

A.8 Folders and Folder Keys

66. How do I create, rename, or delete a folder?

In a Document Browser window:

- **Create:** from the **File** menu, click **New** and then **Folder**; enter a name and description, and click **OK**.
- **Rename or delete:** select the folder and, from the **Edit** menu, click **Rename** or **Delete**.

67. How do I search for documents in a folder?

Follow these instructions:

1. In a Document Browser window, select the folder and, from the **Edit** menu, click **Search**.
2. Click **All of the following** or **Any of the following**.
3. Optional: select **Search subfolders** to search the entire folder hierarchy recursively.
4. Add your search criteria and click **Search**.

68. What does a folder key let the holder see?

The folder key holder can view only the documents in the folder for which the holder also has a document key, and the subfolders for which the holder has a folder key. The view permission of each of those keys must be enabled.

69. What permissions can a folder key grant?

Only two, both lossless: allow the contents of the folder to be viewed, and allow the contents of the folder to be searched.

70. How do I see the folder keys other users have created for me?

In the Console window, from the **File** menu, click **New** and then **My Folder Keyring**. The viewing and sorting options are the same as for document keys. To open a folder, select its key and, from the **File** menu, click **Open Folder**.

A.9 Messages

71. What message content permissions are there?

They are the following:

- **Lossless:** view and search.
- **Lossy:** copy to the clipboard, export to a text file, export to a PDF file, and print.

If the view permission is disabled, all other permissions are ignored.

72. What message user permissions are there?

They are the following:

- Allow **Reply** (lossless): recipients can reply to the sender.
- Allow **Reply to All** (lossless): recipients can reply to all recipients.
- Allow **Forward** (lossy): recipients can forward the message to users who were not original recipients.

73. What does the Message read-only check box do?

It disables all lossy permissions by default, including the message user permission that allows forwarding.

74. How do I create a message?

Follow these instructions:

1. In a Message Browser window, from the **File** menu, click **New** and then **Message**.
2. Type the subject in the **Message subject** field.
3. Select or clear permissions in the **Message Content Permissions** and **Message User Permissions** tabs; optionally, select **Message read-only**.
4. Click **OK**.

You can then add content, recipients, and document attachments. The Message Editor window has the same editing features as the Document Editor window.

75. How do I add recipients to a message?

Click **To** for direct recipients, **Cc** for copied recipients, or **Bcc** for blind-copied recipients.

76. How do document attachments work?

Click **Add Document** or **Remove Document** to manage attachments, and **Verify Documents** to check that your recipients have document keys for them.

Recipients need a document key to open an attachment; if any recipient lacks one, you will be automatically prompted to create a document key for them.

77. How do I view and reply to a message?

In a Message Browser window, double-click the message. **Reply**, **Reply to All**, and **Forward** are available only if the creator of the message has enabled them.

78. Why can't I print, export, or copy an entire message thread?

Each message in a thread keeps its own permissions, which can conflict. Resolve this by selecting the matching filter at the bottom of the Message Reader (or Message Editor) window, for example **Display messages that can be Printed**. The filter hides messages that do not allow the operation.

79. Can I change a message after I have sent it?

Yes. You can update the text, subject, recipients, attachments, and permissions at any time, and recipients will see your updates the next time they open the message. The modification date is shown in bold until the recipient reads the updated message.

80. What happens when I add or remove a recipient after sending?

A removed recipient will not see the message the next time they open a Message Browser window; an added recipient will.

81. Why can't I delete one of my messages?

The message is being referenced by another message, for example in a message thread, so it is still in use. You can still control its visibility by disabling its view permission. Note that deleting a message cannot be undone.

82. How do I search my messages?

Follow these instructions:

1. Select **Messages** at the top of the message folder pane to search all messages, or select a particular message folder.
2. From the **Edit** menu, click **Search Messages**.
3. Click **All of the following** or **Any of the following**, add your criteria, and click **Search**.

83. How do I create or delete a message folder?

To create one, from the **File** menu, click **New** and then **Message Folder**, enter a name, and click **OK**. To delete one, select it and, from the **Edit** menu, click **Delete Message Folder**. A message folder must be empty before it can be deleted.

A.10 User Groups and Picture Directories

84. Why can't I see the members of a group?

Direct access to the users in any group requires a group key created by the Confinet Administrator for you. When your account is created, the Confinet Administrator will normally create group keys for you based upon your needs and requirements.

85. How do I manage personal groups?

In a My Groups window:

- **Create a personal group:** from the **File** menu, click **New** and then **User Group**.
- **Add users:** select a group; from the **File** menu, click **New** and then **User**; then select the users to add to your personal group.
- **Remove a user:** select the user; from the **Edit** menu, click **Remove User**.
- **Delete a group:** select the group; from the **Edit** menu, click **Delete User Group**.

86. What image formats are supported?

BMP, GIF, JPG, and PNG.

87. Are pictures stored in the Confinet database?

No. Only the name of the picture file is embedded in the document or message (without its directory pathname). Confinet automatically adds the directory pathname containing the picture to the list of directories it searches for pictures. One of the best ways to share Confinet documents containing pictures is by inserting them from network shares that are accessible to the users you want to share your documents with (these users should have access to the network shares *and* they should add them to their list of picture directories).

88. I moved an image file and it no longer appears. What should I do?

Add the image file's new location to your picture directories.

Appendix B

Icon Sets

These icons are grouped into sixteen sets by subject. The set names reflect where each icon was first used, so the right icon for your document is sometimes in a set you wouldn't expect. Many of these symbols are widely recognized. Readers will usually understand them with little or no explanation, which makes them good for marking up, labeling, and illustrating documents.

When developing documents and messages, you can insert icons from the following categories:

- Action Icons
- Alert Icons
- Audiovisual Icons
- Communication Icons
- Content Icons
- Device Icons
- Editor Icons
- File Icons
- Hardware Icons
- Image Icons
- Maps Icons
- Navigation Icons
- Notification Icons

- Places Icons
- Social Icons
- Toggle Icons

Consult the table on the next page for examples and suggestions on the use of these icon sets.

Table B.1: Quick Reference: Finding the Right Icon

Document need	**Look in**	**Example icon**
Tip or helpful hint	Action	Lightbulb
General note or information	Action	Circled “i”
Caution or warning	Alert	Exclamation mark in a triangle
Error or critical problem	Alert	Exclamation mark in a circle
High-priority item	Notification	Priority mark
Item needing review	Content	Flag
Completed step or approved item	Action	Check mark
Security or confidential material	Action	Padlock
Time requirement or deadline	Action	Clock
Date or scheduled event	Action	Calendar
Availability (free, busy)	Notification	Calendar with check or ×
Telephone number	Communication	Telephone
Email address	Communication	Envelope
Street address or location	Maps	Map pin
Directions or means of travel	Maps	Car, bus, train, walking figure
Web address or cross-reference	Content	Chain link
Enclosure or attachment	File	Paper clip
Where a file is stored	File	Folder, cloud
Audio or video material	Audiovisual	Play symbol, microphone
Captioning available	Audiovisual	Closed-caption symbol
Figure, photograph	Image	Photograph, camera
Chart or data summary	Editor	Bar, line, or pie chart
Formula or calculation	Editor	Summation sign (Σ)
Financial figure	Editor	Currency symbol
Equipment or device list	Hardware	Computer, phone, keyboard
Power or connection status	Device	Battery, Wi-Fi, Bluetooth
Sequence, flow, or pointer	Navigation	Arrows, chevrons
Person, team, or organization	Social	Person, group, building
Celebration or invitation	Social	Cake, party hat
Satisfaction or feedback result	Social	Smiling or frowning face
Amenities offered at a location	Places	Pool, fitness center, spa
Restroom or seating signage	Notification	Restroom, airline seat
Checklist or form field	Toggle	Empty or checked box
Multiple-choice option	Toggle	Empty or filled circle
Rating	Toggle	Stars (empty, half, full)

B.1 Action Icons

This is the largest and most general-purpose set. It contains symbols for everyday activities and concepts, such as a house, magnifying glass, gear, trash can, check mark, padlock, bookmark, heart, clock, light bulb, wrench, eye, thumbs up and thumbs down, and shopping cart. Use these icons to represent common ideas in instructions, reports, and reference material. For example, a light bulb can mark a tip, a padlock a security note, a clock a time requirement, and a check mark a completed step. If you can't find an icon in a more specific set, look here first.

B.1.1 Action Icons Page 1

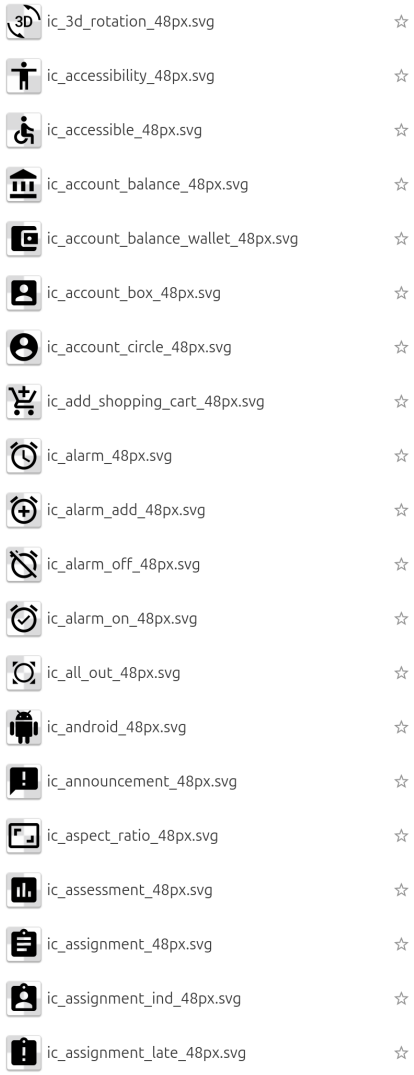


Figure B.1: Action Icons

B.1.2 Action Icons Page 2

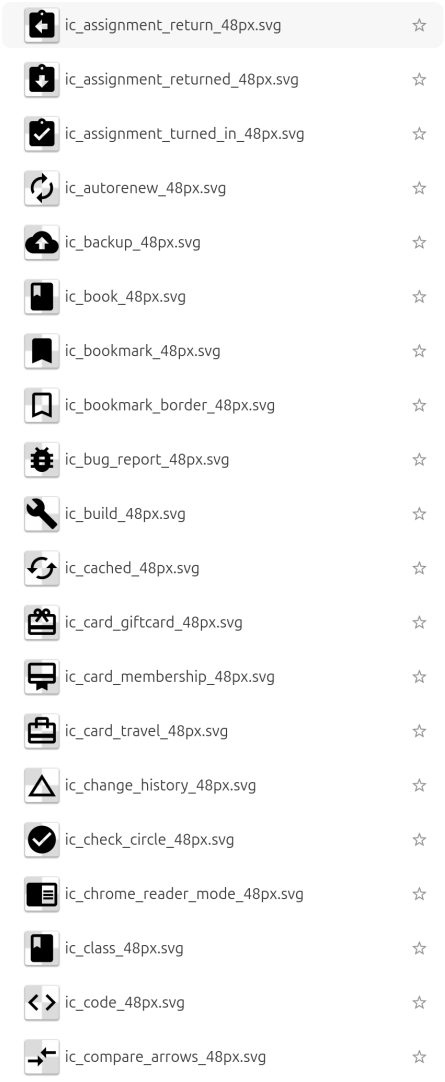


Figure B.2: Action Icons

B.1.3 Action Icons Page 3

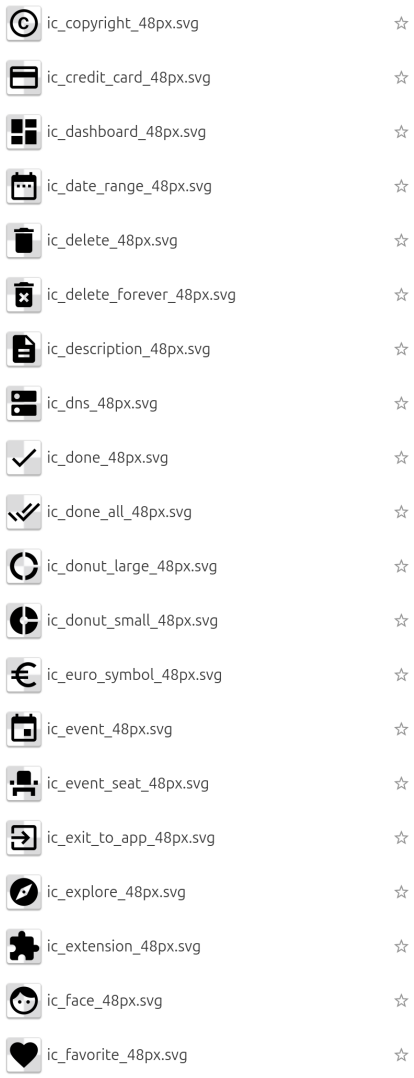


Figure B.3: Action Icons

B.1.4 Action Icons Page 4

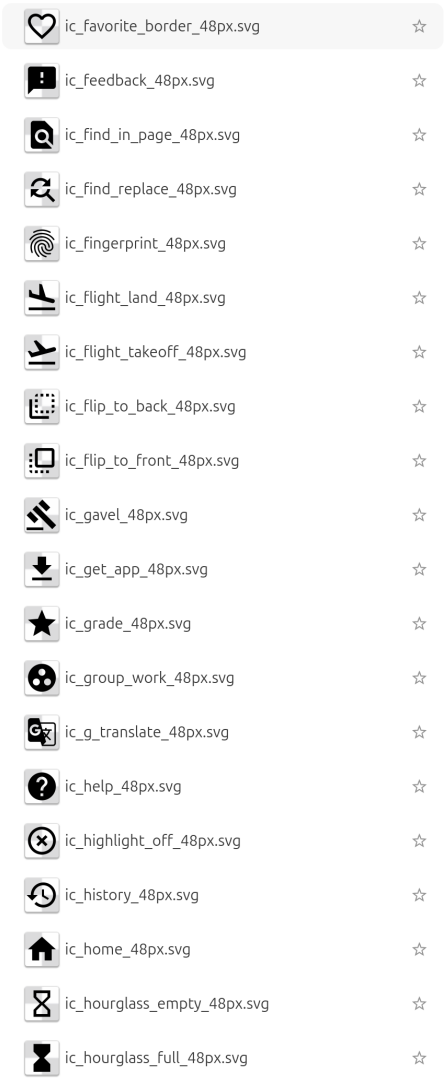


Figure B.4: Action Icons

B.1.5 Action Icons Page 5

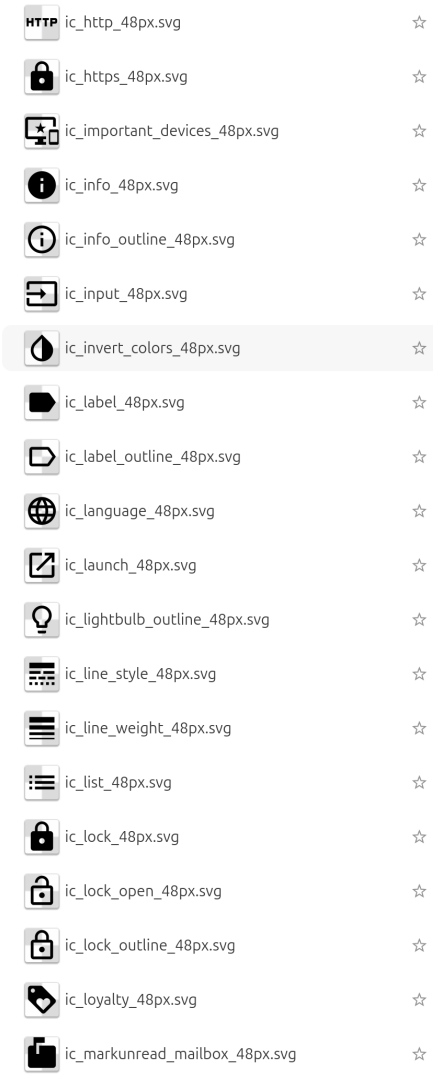


Figure B.5: Action Icons

B.1.6 Action Icons Page 6

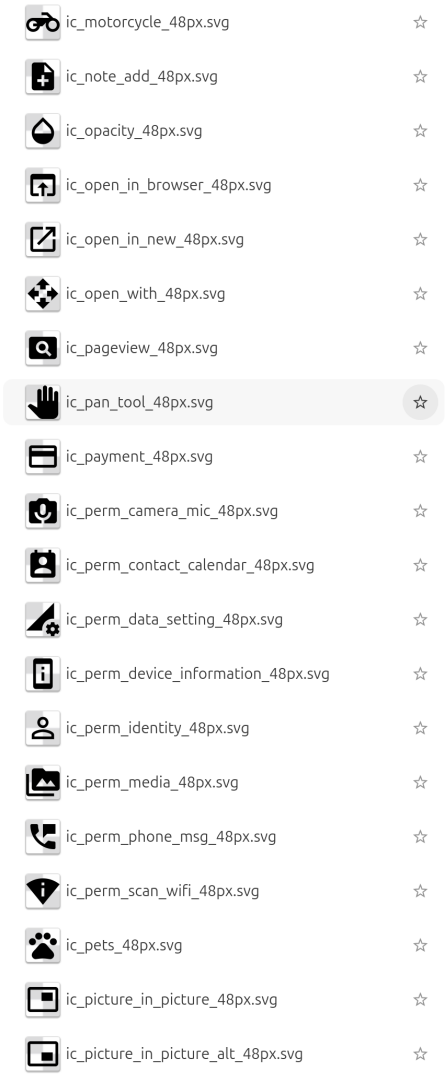


Figure B.6: Action Icons

B.1.7 Action Icons Page 7

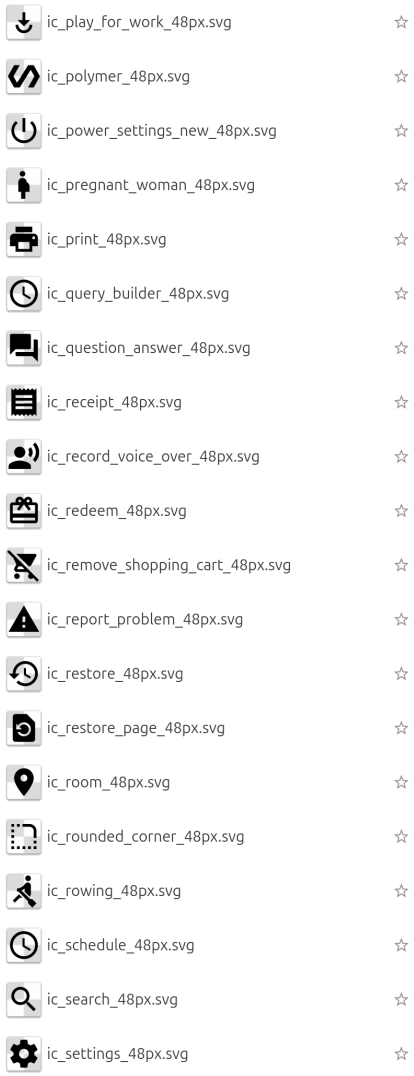


Figure B.7: Action Icons

B.1.8 Action Icons Page 8

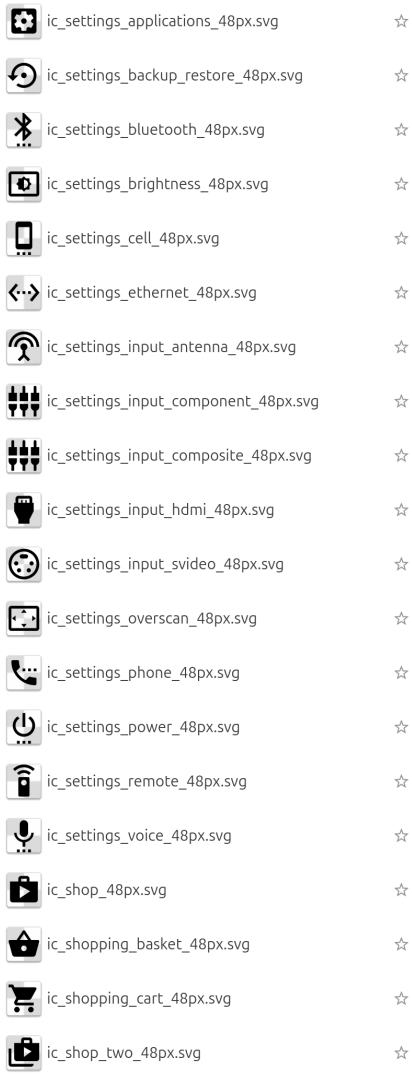


Figure B.8: Action Icons

B.1.9 Action Icons Page 9

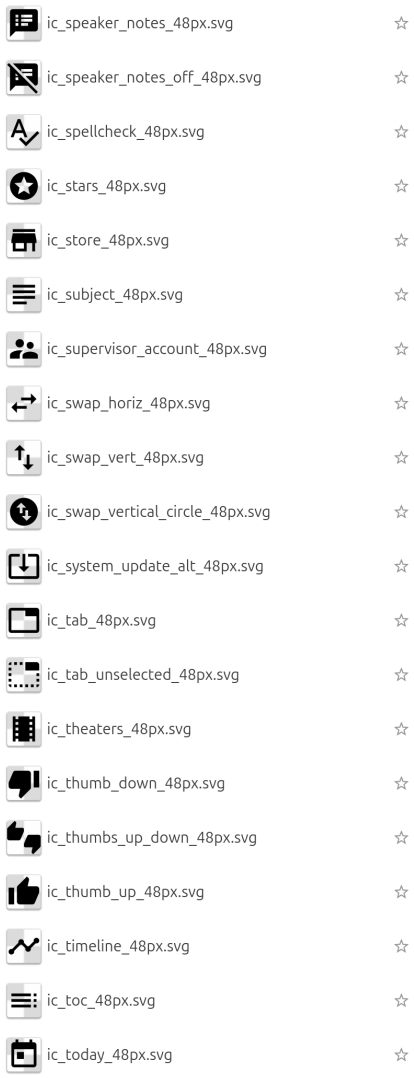


Figure B.9: Action Icons

B.1.10 Action Icons Page 10

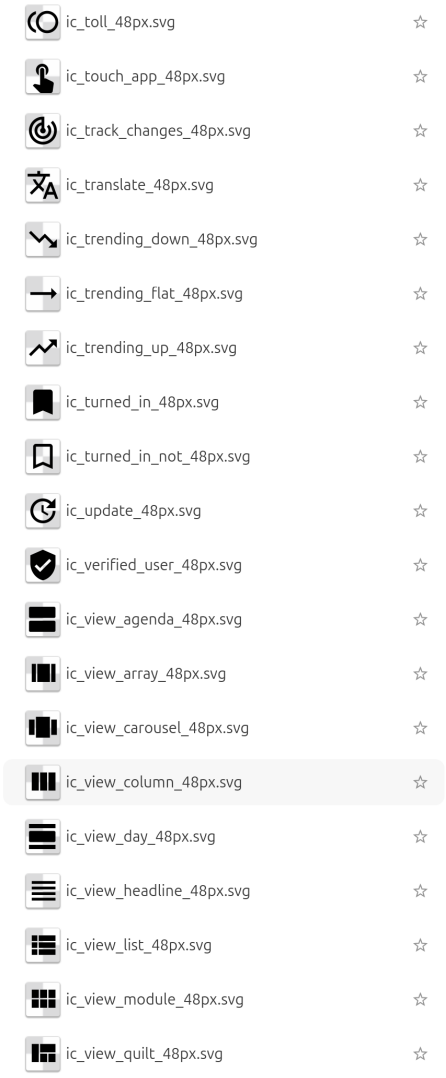


Figure B.10: Action Icons

B.1.11 Action Icons Page 11

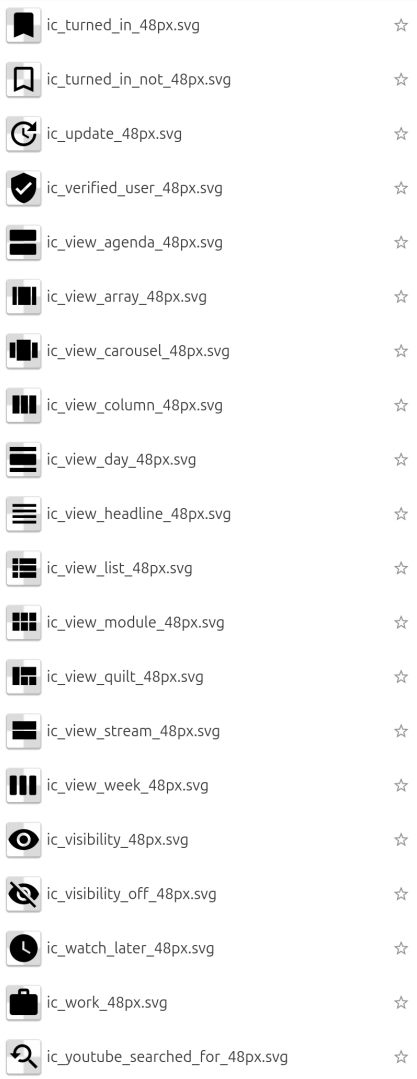


Figure B.11: Action Icons

B.2 Alert Icons

This is a small, focused set of warning and error symbols, including the exclamation mark in a triangle and the exclamation mark in a circle. Use these icons to draw attention to cautions, warnings, errors, and safety information. In procedures, place them beside steps where a mistake could cause damage, data loss, or injury. Use them sparingly, because readers learn to ignore warnings that appear too often.

B.2.1 Alert Icons Page 1



Figure B.12: Alert Icons

B.3 Audiovisual Icons

This set contains symbols related to sound, video, and media, such as play, pause, and stop symbols, microphones, video cameras, speakers and volume levels, film, albums, playlists, radio, and closed captioning. Use these icons to identify references to recordings, podcasts, videos, and music. They work well in event programs, course materials that point to video lessons, media catalogs, transcripts, and accessibility notes, such as where captions or audio descriptions are available.

B.3.1 Audiovisual Icons Page 1

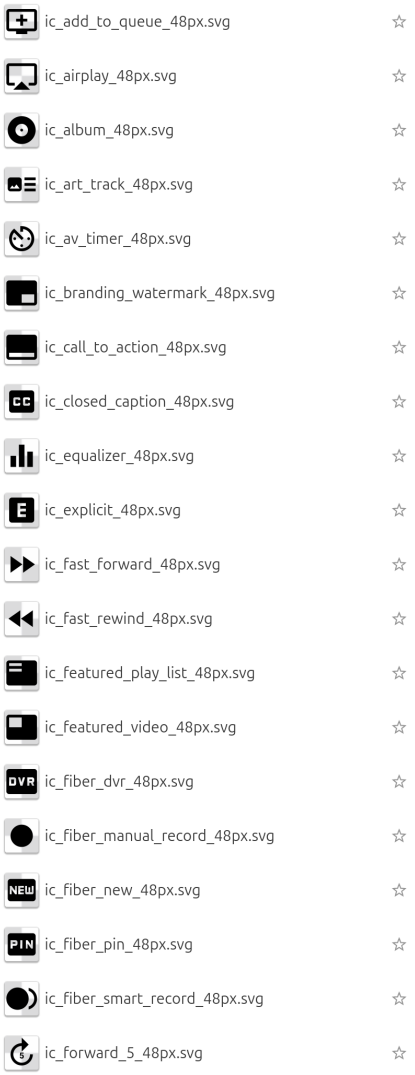


Figure B.13: Audiovisual Icons

B.3.2 Audiovisual Icons Page 2

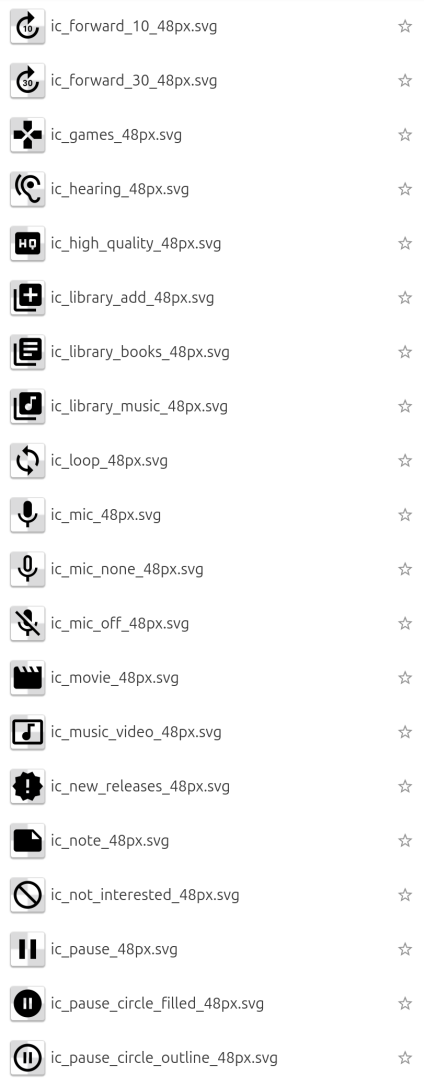


Figure B.14: Audiovisual Icons

B.3.3 Audiovisual Icons Page 3

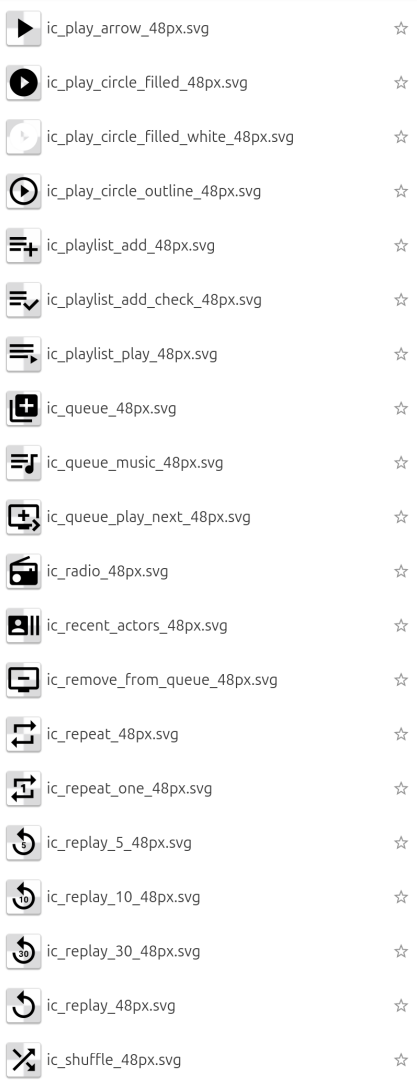


Figure B.15: Audiovisual Icons

B.3.4 Audiovisual Icons Page 4

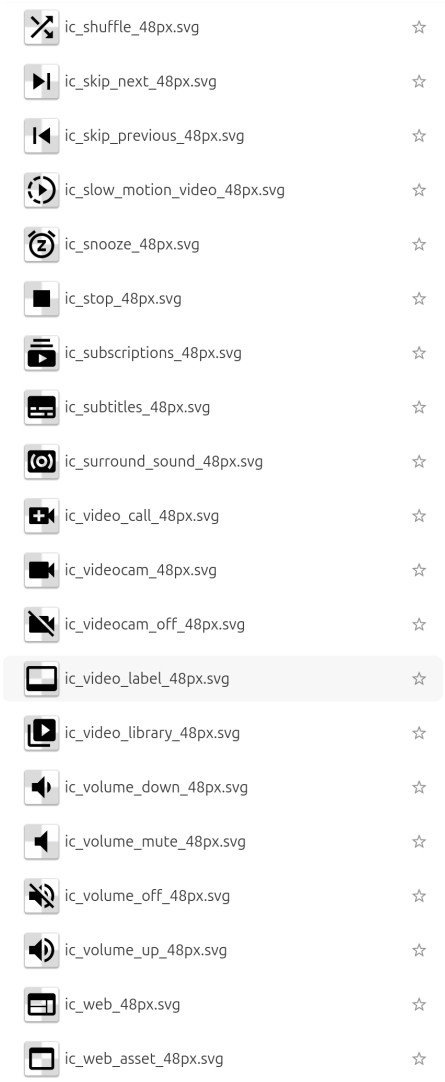


Figure B.16: Audiovisual Icons

B.4 Communication Icons

This set contains symbols for the ways people get in touch, such as telephones, envelopes, chat bubbles, contact cards, forums, dial pads, and the @ sign. Use these icons to mark contact information in letterheads, business cards, directories, brochures, and the “Contact Us” sections of documents. Pairing each contact method with its icon (a phone beside a phone number, an envelope beside an email address) makes the information quicker to scan.

B.4.1 Communication Icons Page 1

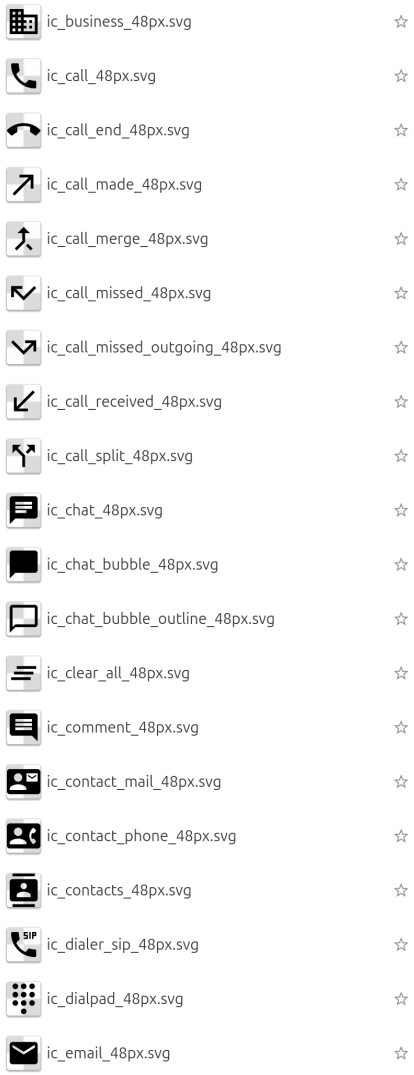


Figure B.17: Communication Icons

B.4.2 Communication Icons Page 2

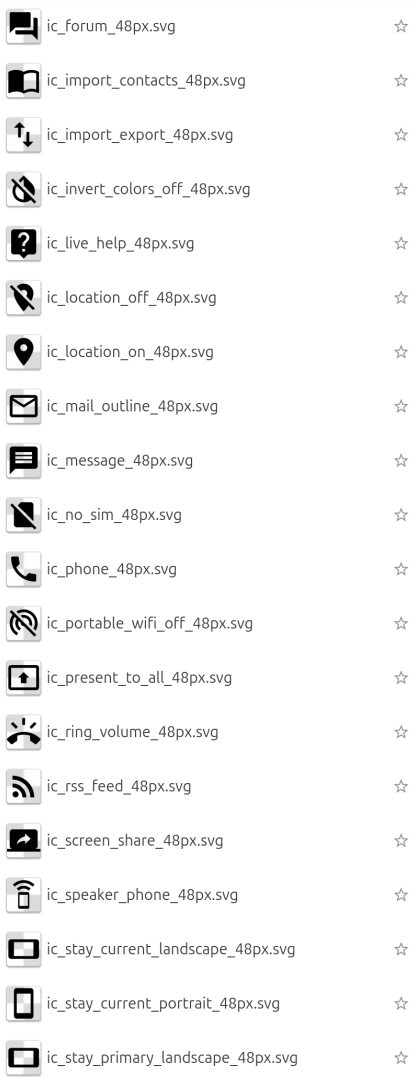


Figure B.18: Communication Icons

B.4.3 Communication Icons Page 3

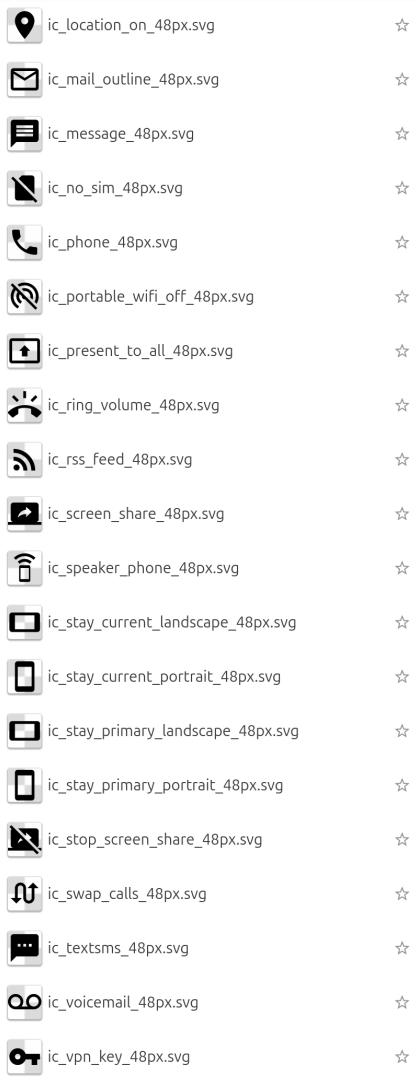


Figure B.19: Communication Icons

B.5 Content Icons

This set contains symbols for creating and handling material, such as add and remove signs, pencils, flags, links, archive boxes, inboxes, send arrows, filters, and sort indicators. Use these icons in editorial and administrative documents. A flag can mark items needing review, a link can mark cross-references or web addresses, a pencil can mark sections open for editing, and add and remove signs can show additions and deletions in change summaries.

B.5.1 Content Icons Page 1

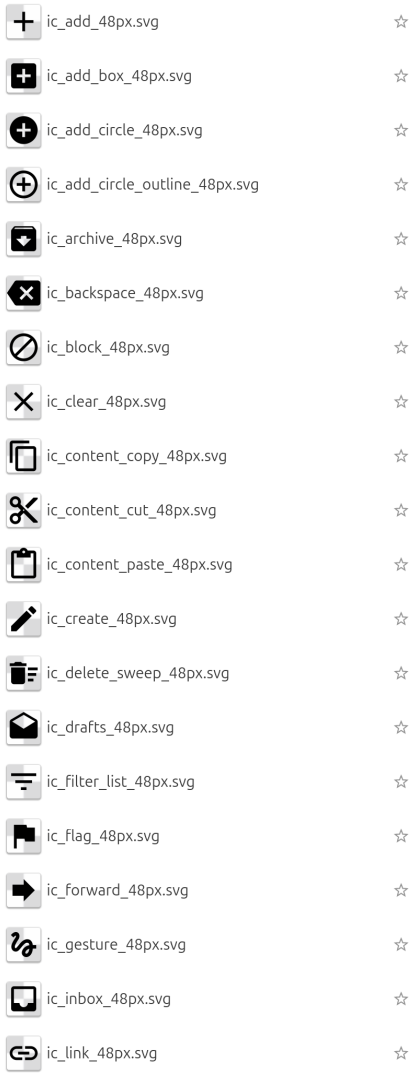


Figure B.20: Content Icons

B.5.2 Content Icons Page 2

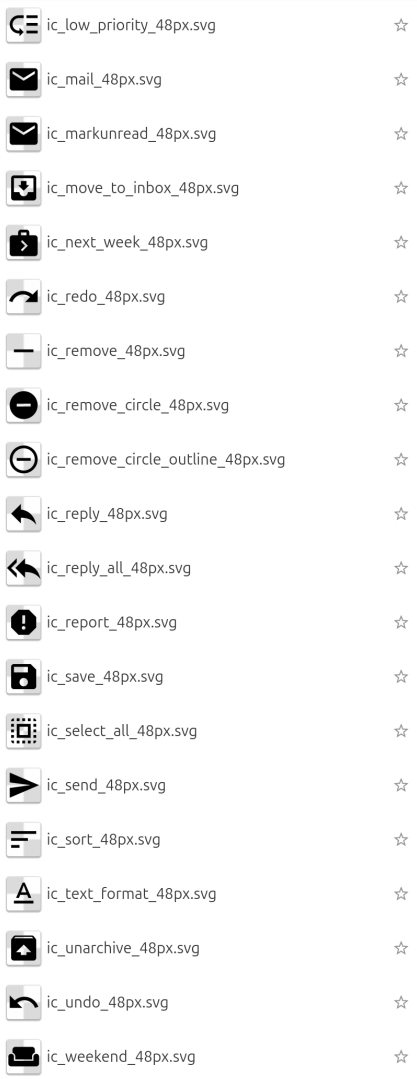


Figure B.21: Content Icons

B.6 Device Icons

This set contains symbols for the status and features of electronic devices, such as battery levels, Wi-Fi and cellular signal strength, Bluetooth, GPS, brightness, storage, USB, and airplane mode. Use these icons in technical documentation, IT guides, product specifications, and troubleshooting instructions. Their most common use is to show a connection, power state, or device capability.

B.6.1 Device Icons Page 1

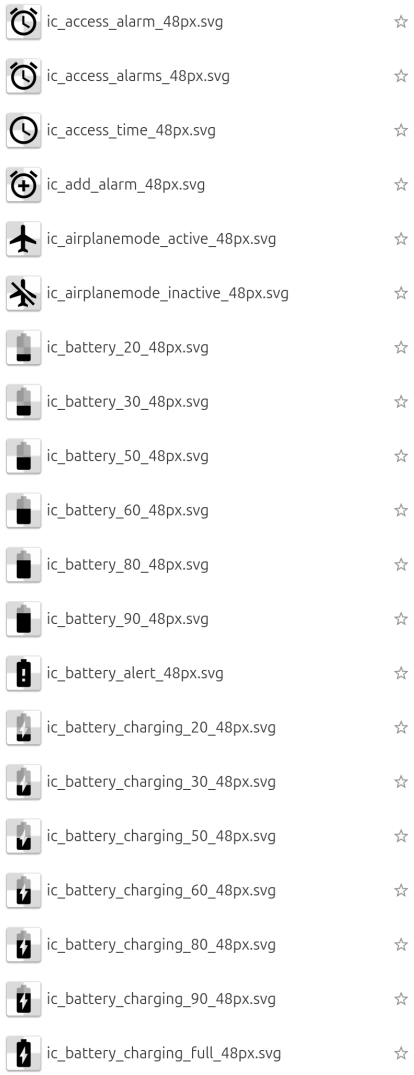


Figure B.22: Device Icons

B.6.2 Device Icons Page 2

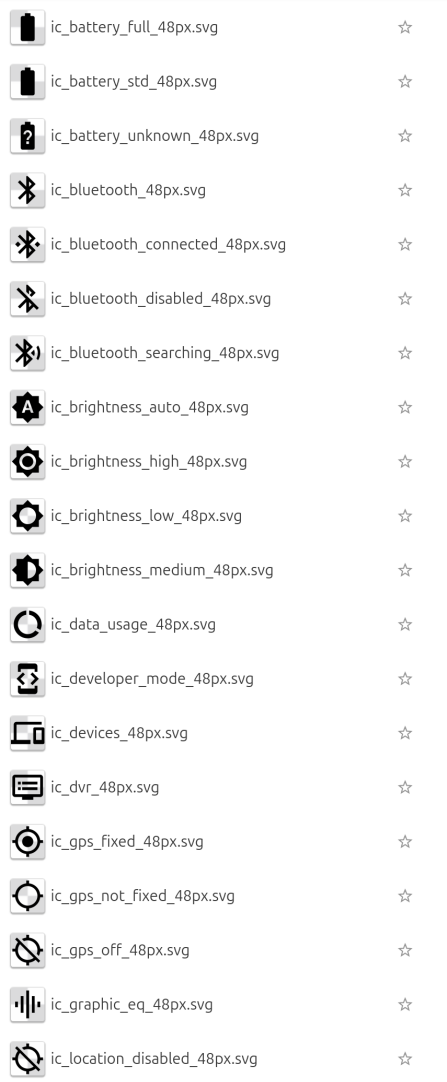


Figure B.23: Device Icons

B.6.3 Device Icons Page 3

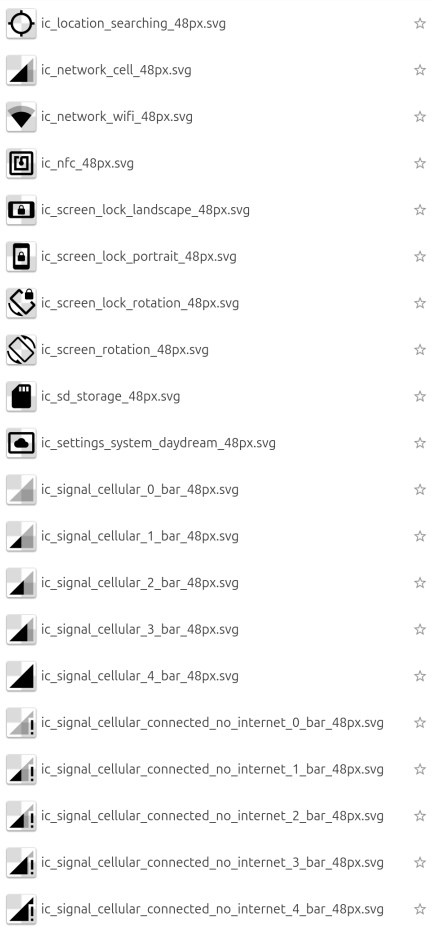


Figure B.24: Device Icons

B.6.4 Device Icons Page 4

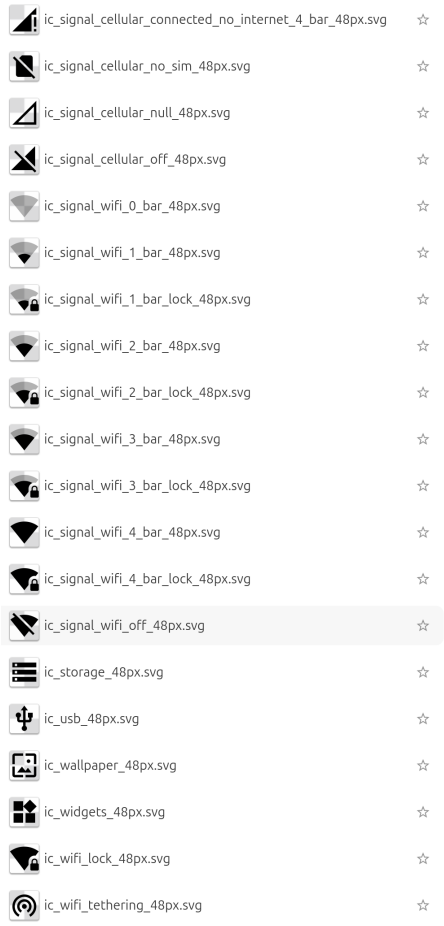


Figure B.25: Device Icons

B.7 Editor Icons

This set contains symbols for text formatting and document elements, such as bold, italic, and underline marks, alignment indicators, bulleted and numbered lists, quotation marks, tables, attachments, comments, currency symbols, and several types of chart (bar, line, pie, and bubble). Use these icons in style guides and writing instructions to refer to formatting, and in reports to label sections containing charts, tables, formulas, or financial figures.

B.7.1 Editor Icons Page 1

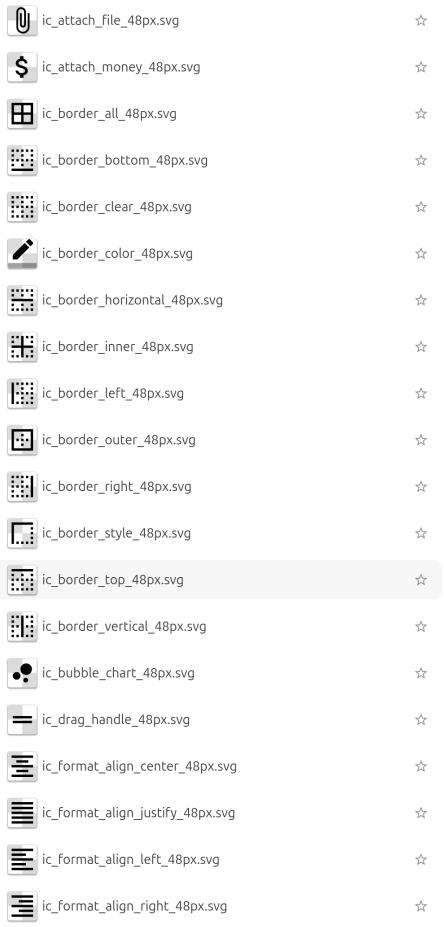


Figure B.26: Editor Icons

B.7.2 Editor Icons Page 2



Figure B.27: Editor Icons

B.7.3 Editor Icons Page 3

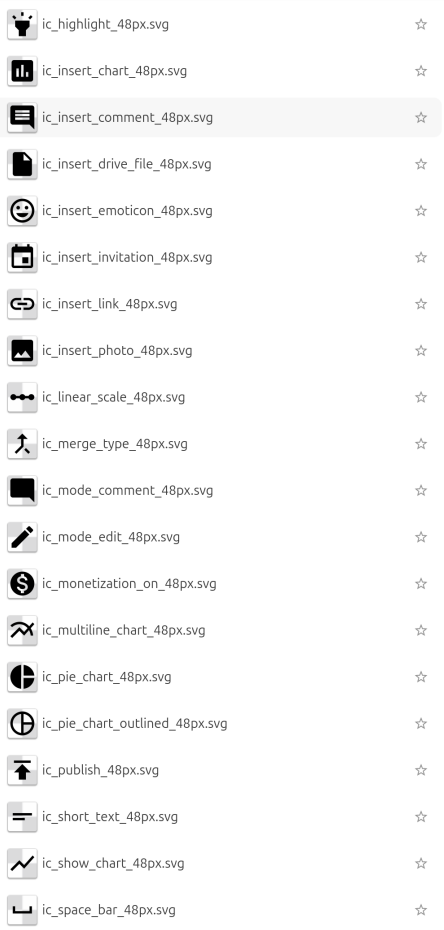


Figure B.28: Editor Icons

B.7.4 Editor Icons Page 4

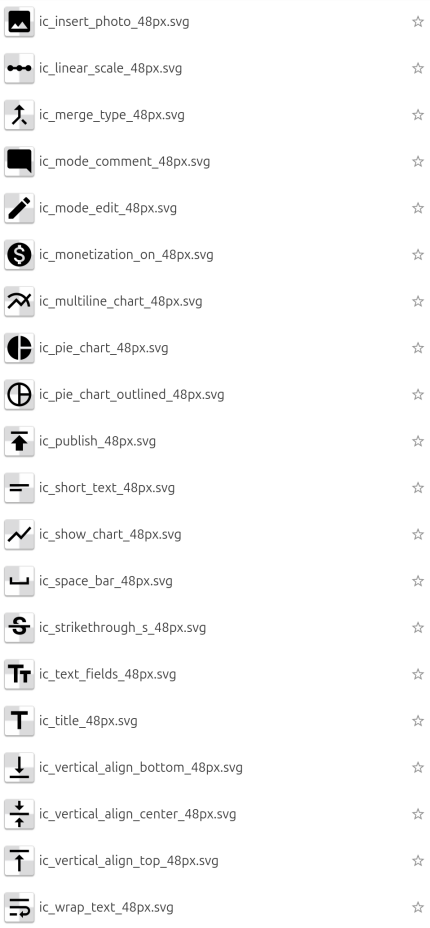


Figure B.29: Editor Icons

B.8 File Icons

This set contains symbols for files and storage, such as folders, shared folders, clouds, upload and download arrows, and paper clips. Use these icons in records-management procedures, filing instructions, and documents that refer to where material is stored or how it is exchanged. For example, a cloud can mark online storage, a folder a filing location, and a paper clip an enclosure or attachment.

B.8.1 File Icons Page 1

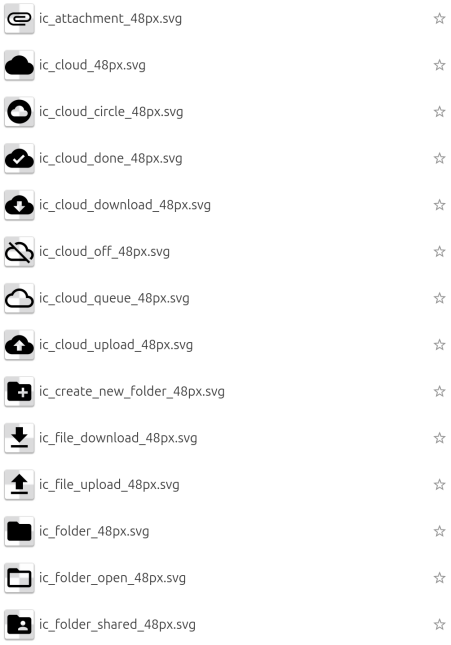


Figure B.30: File Icons

B.9 Hardware Icons

This set contains pictures of physical equipment, such as desktop and laptop computers, phones, tablets, keyboards, mice, headsets, speakers, televisions, watches, routers, memory chips, game controllers, and SIM cards. Use these icons in equipment lists, inventory records, setup and installation guides, network diagrams, and asset documentation. They can also identify which device a set of instructions applies to.

B.9.1 Hardware Icons Page 1

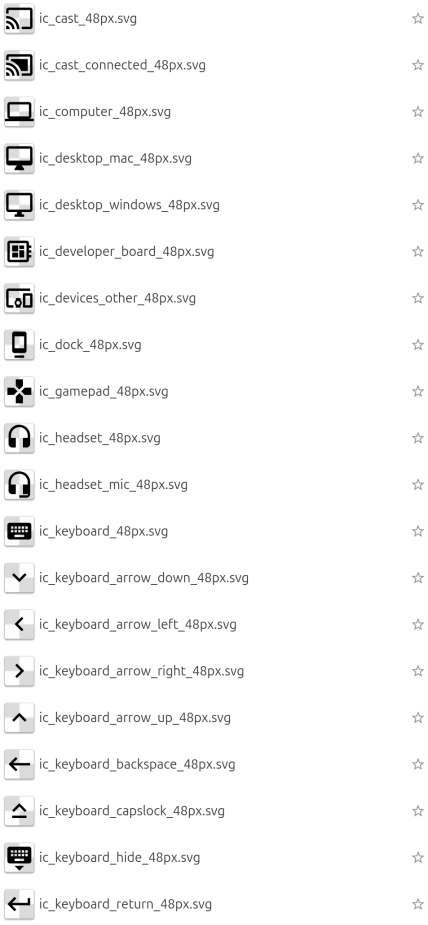


Figure B.31: Hardware Icons

B.9.2 Hardware Icons Page 2

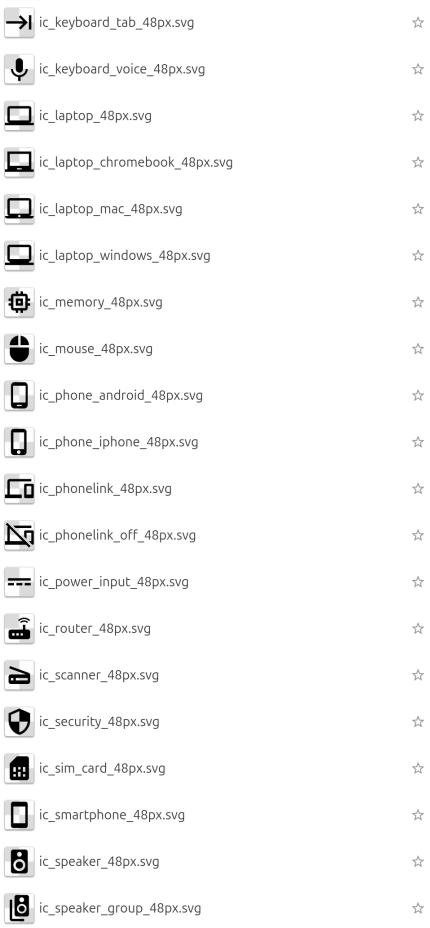


Figure B.32: Hardware Icons

B.9.3 Hardware Icons Page 3

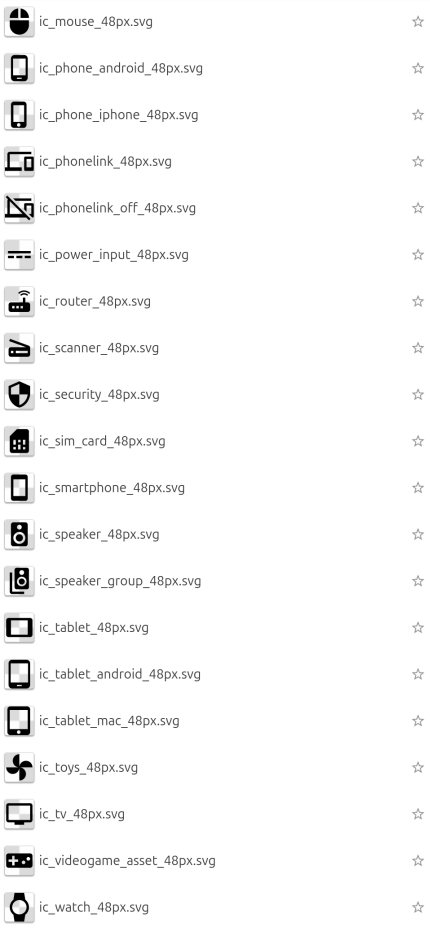


Figure B.33: Hardware Icons

B.10 Image Icons

This set contains symbols for photography and visual art, such as cameras, photographs, landscapes, crop and rotate symbols, color palettes, paintbrushes, filters, flash settings, and slideshows. It also includes a few miscellaneous symbols, including a musical note and some weather-like symbols such as the sun and clouds. Use these icons to mark figures and illustrations, image credits, photography and design briefs, art-related material, and picture galleries in documents.

B.10.1 Image Icons Page 1

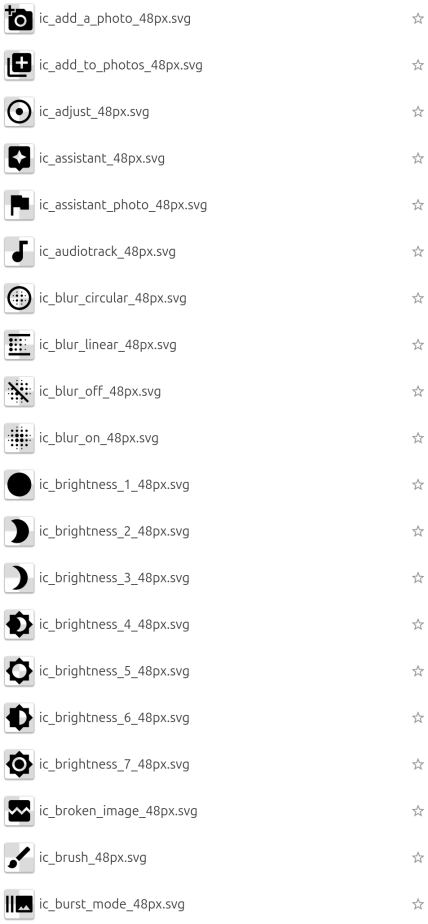


Figure B.34: Image Icons

B.10.2 Image Icons Page 2

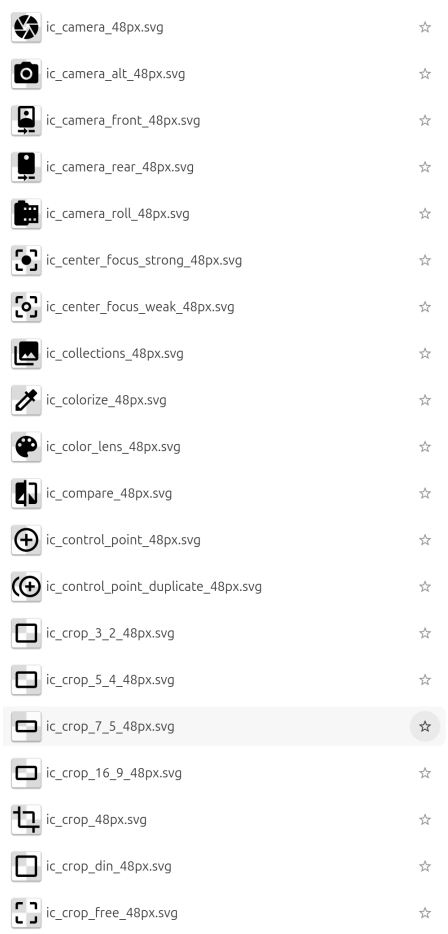


Figure B.35: Image Icons

B.10.3 Image Icons Page 3

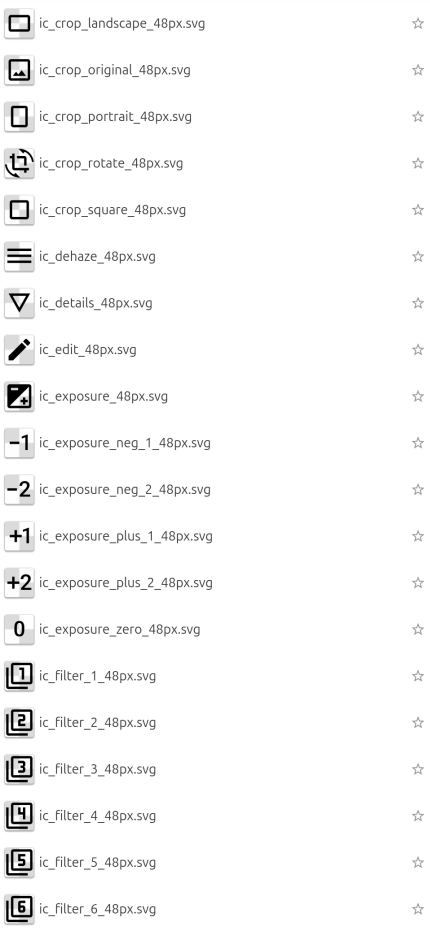


Figure B.36: Image Icons

B.10.4 Image Icons Page 4

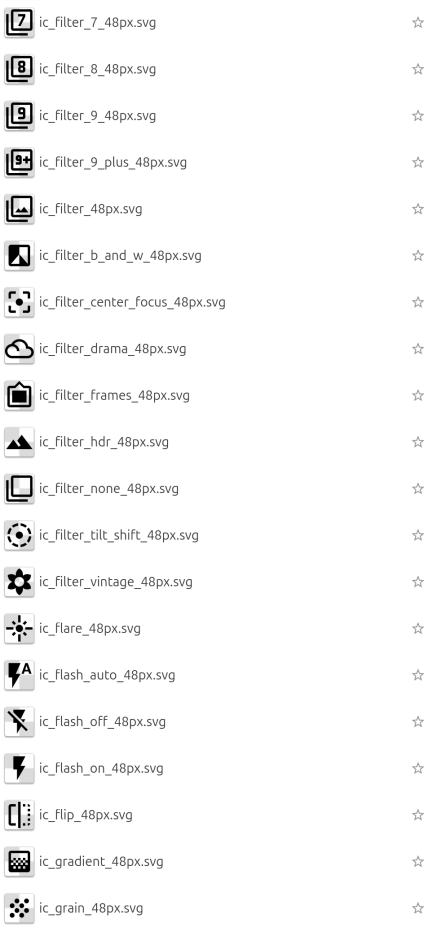


Figure B.37: Image Icons

B.10.5 Image Icons Page 5

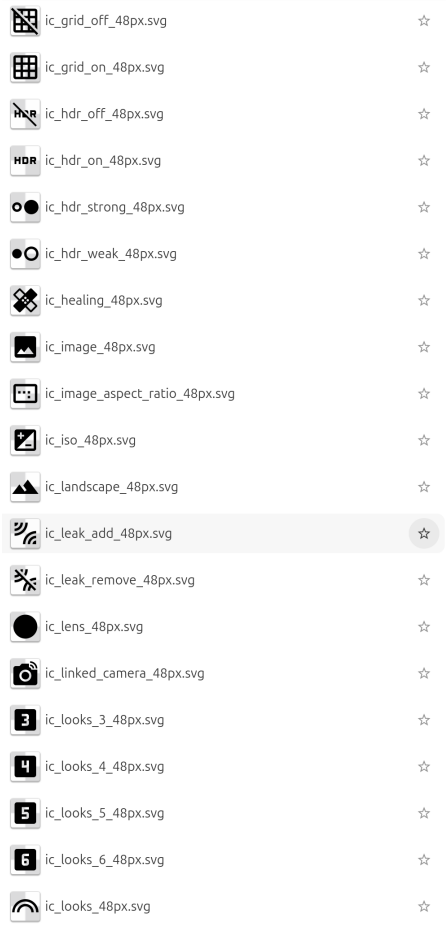


Figure B.38: Image Icons

B.10.6 Image Icons Page 6

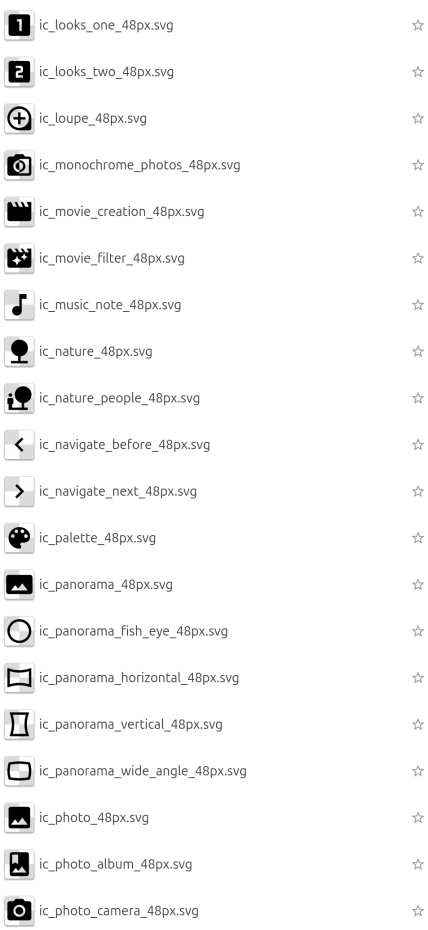


Figure B.39: Image Icons

B.10.7 Image Icons Page 7

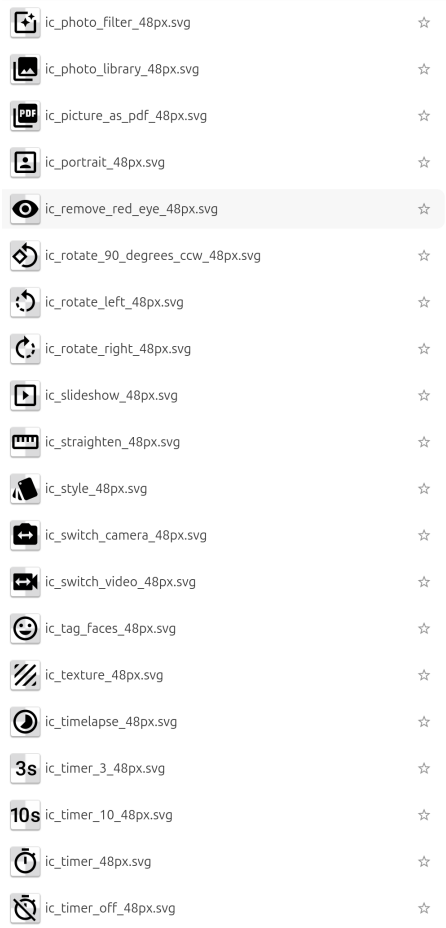


Figure B.40: Image Icons

B.10.8 Image Icons Page 8

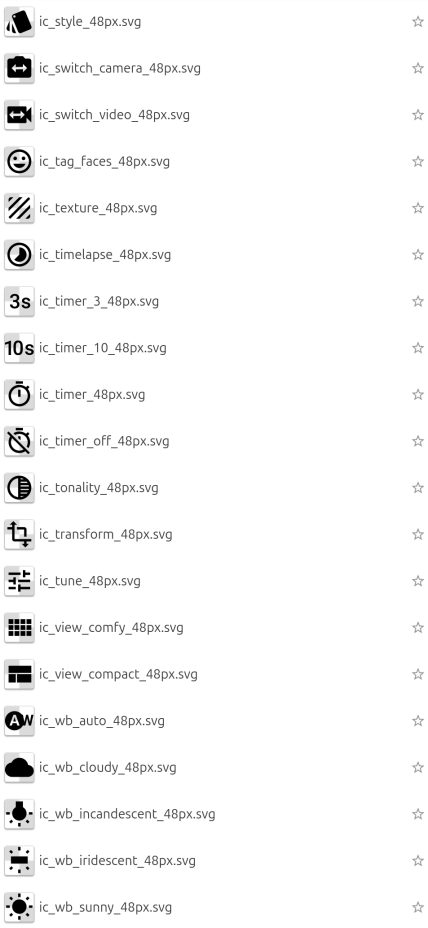


Figure B.41: Image Icons

B.11 Maps Icons

This set contains symbols for locations, travel, and local services, such as map pins, maps, directions, cars, buses, trains, subways, bicycles, walking figures, airplanes, and boats. It also includes many points of interest, such as restaurants, cafes, hotels, hospitals, pharmacies, gas stations, parking, and ATMs. Use these icons in travel itineraries, event directions, venue information, logistics and shipping documents, and map legends. For example, you can show the travel options to a venue by placing each transit icon beside its directions.

B.11.1 Maps Icons Page 1

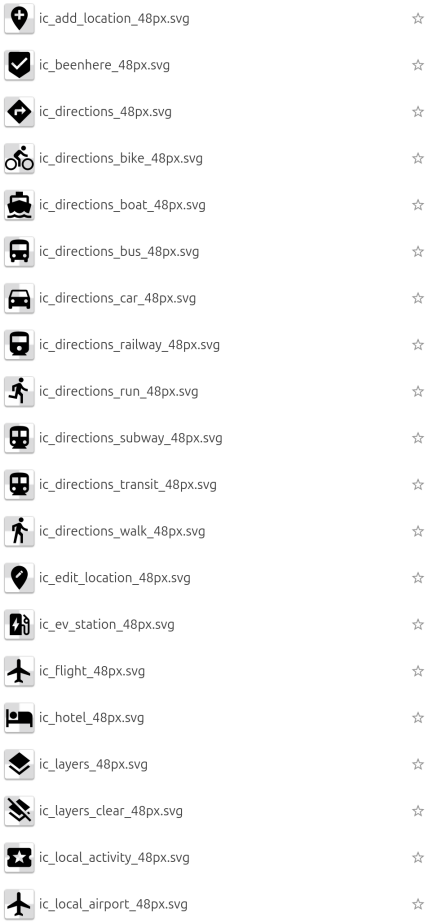


Figure B.42: Maps Icons

B.11.2 Maps Icons Page 2

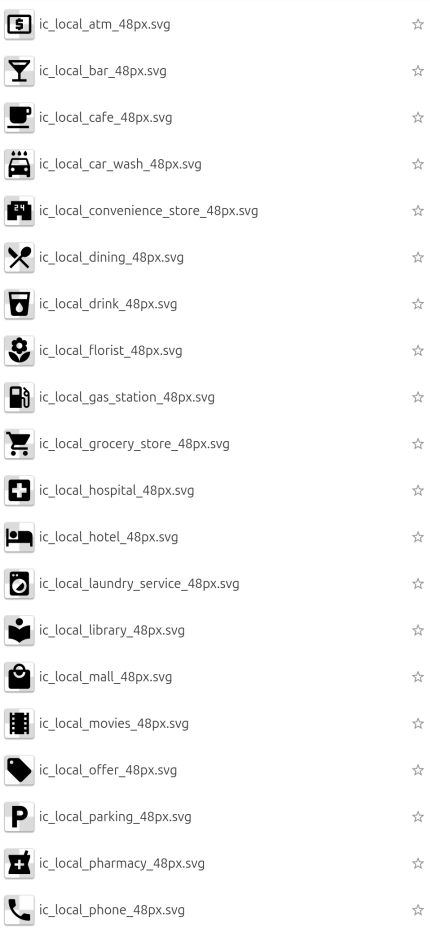


Figure B.43: Maps Icons

B.11.3 Maps Icons Page 3

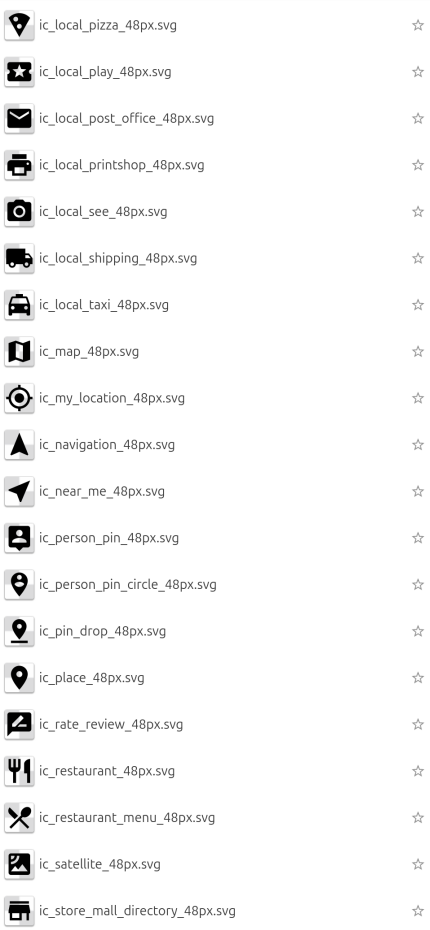


Figure B.44: Maps Icons

B.11.4 Maps Icons Page 4

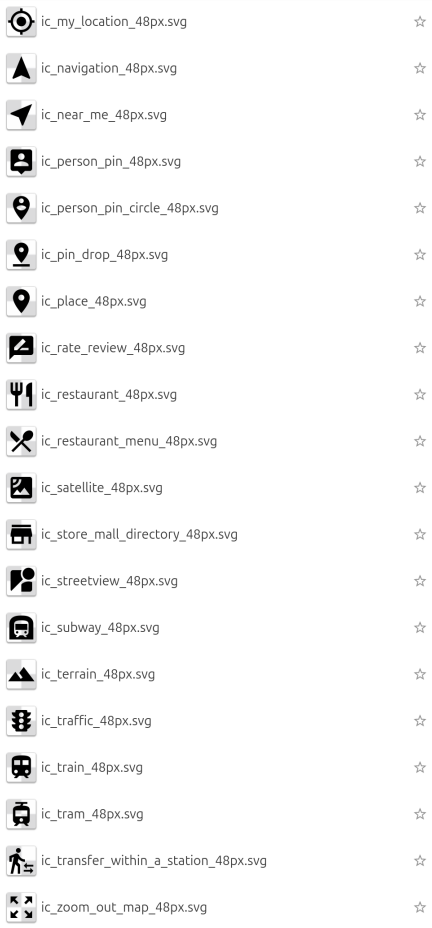


Figure B.45: Maps Icons

B.12 Navigation Icons

This set consists mainly of arrows and chevrons pointing in every direction, plus symbols such as check marks, close (×), refresh, and expand and collapse indicators. Outside an application interface, these icons are best used as pointers and connectors. Use them to show sequence and flow in diagrams, to lead the reader from one step to the next, to point to a feature in an illustration, or to signal a cross-reference.

B.12.1 Navigation Icons Page 1

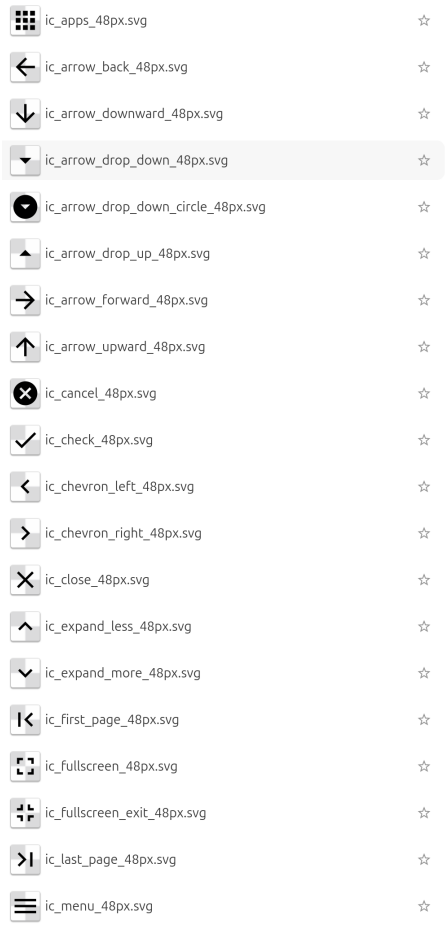


Figure B.46: Navigation Icons

B.12.2 Navigation Icons Page 2

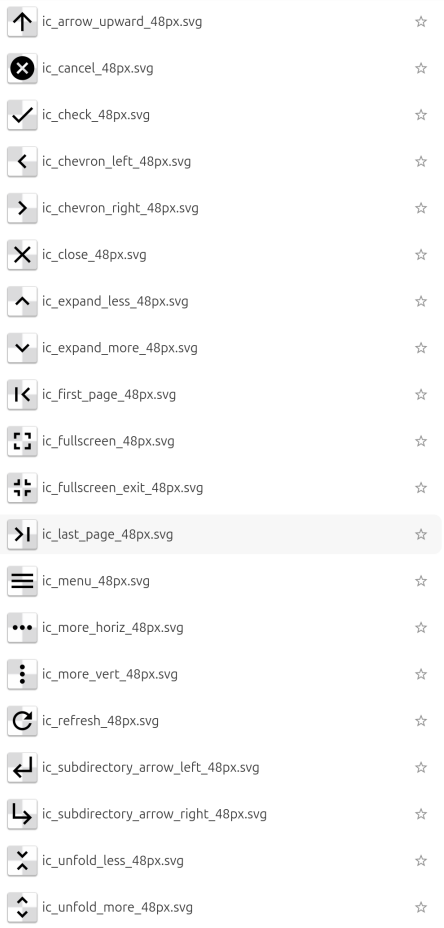


Figure B.47: Navigation Icons

B.13 Notification Icons

This set contains a varied group of status and facility symbols. These include calendar symbols for available, busy, and noted events, sync arrows, priority marks, phone call status (missed, in progress), voicemail, encryption locks, and "do not disturb." It also includes several symbols suitable for signs, such as restrooms, airline seating, and vehicles. Use these icons for scheduling and availability in calendars and rosters, for priority marks in task lists, and for facility signage and floor plans.

B.13.1 Notification Icons Page 1

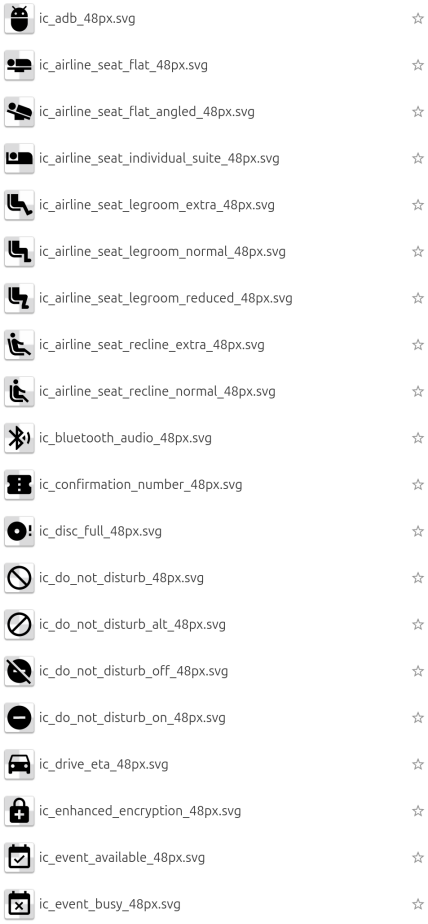


Figure B.48: Notification Icons

B.13.2 Notification Icons Page 2

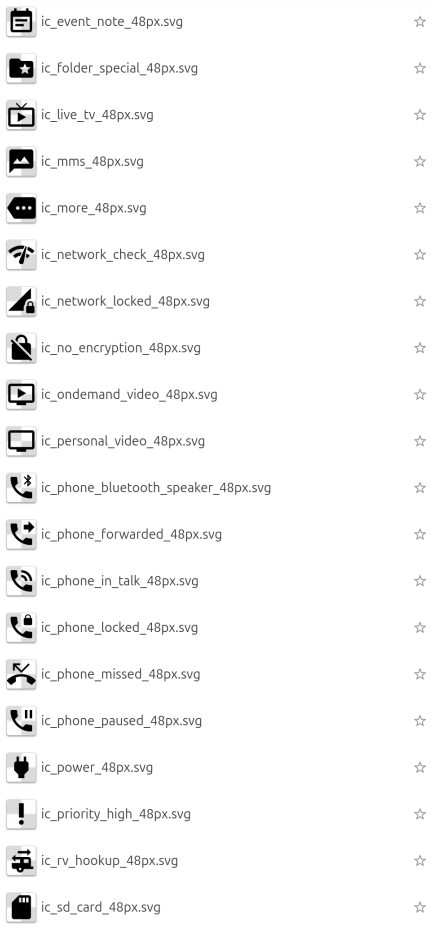


Figure B.49: Notification Icons

B.13.3 Notification Icons Page 3

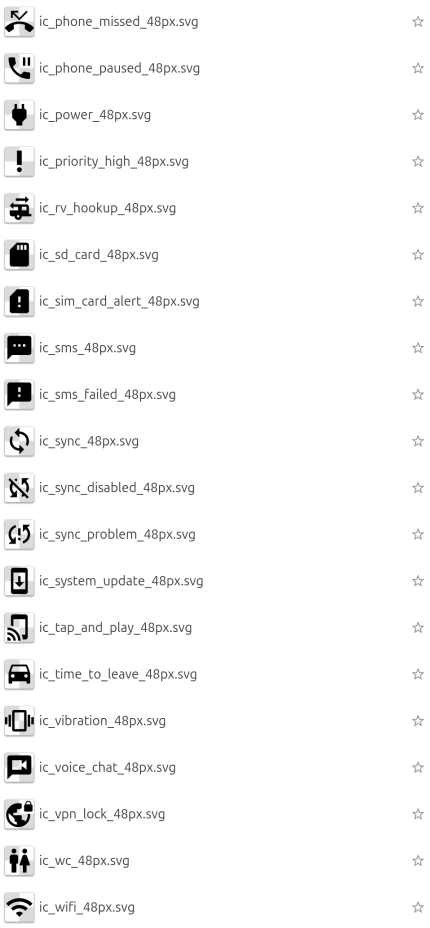


Figure B.50: Notification Icons

B.14 Places Icons

This set contains symbols for amenities and facilities, such as swimming pools, fitness centers, spas, hot tubs, beaches, golf courses, kitchens, room service, child care, air conditioning, business centers, and smoking and no-smoking areas. Use these icons to list what a location offers in hospitality brochures, real estate listings, event and conference guides, building directories, and travel documents.

B.14.1 Places Icons Page 1

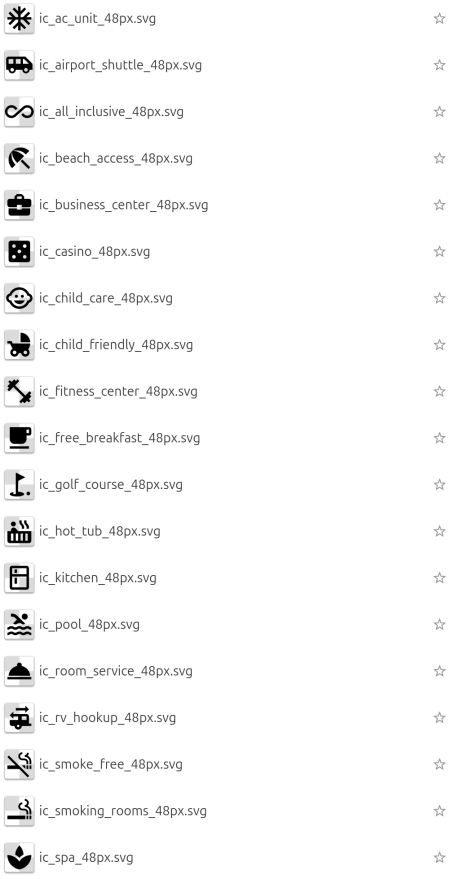


Figure B.51: Places Icons

B.15 Social Icons

This set contains symbols for people, groups, and community life, such as single persons, groups, adding a person, schools, buildings and cities, the globe, sharing, a notification bell, birthday cakes, party hats, smiling and frowning faces, polls, and sports. Use these icons in organization charts, team and staff pages, membership and demographic information, educational material, announcements and invitations, and survey or feedback results. The faces work well for showing satisfaction ratings.

B.15.1 Social Icons Page 1

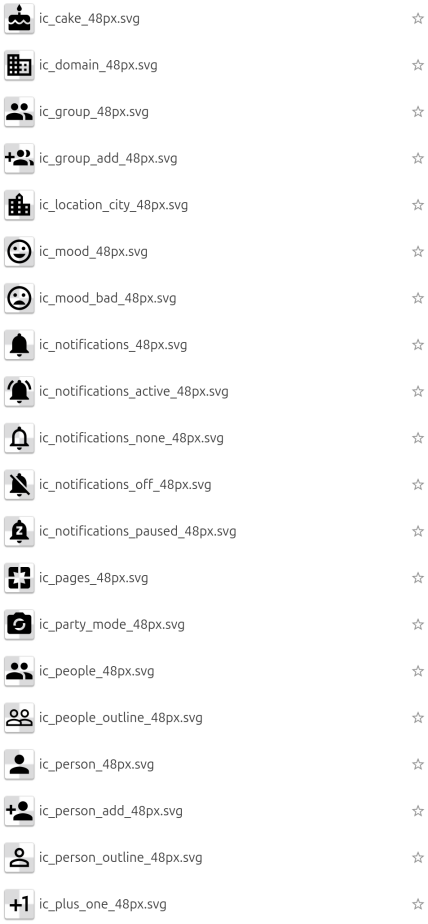


Figure B.52: Social Icons

B.15.2 Social Icons Page 2

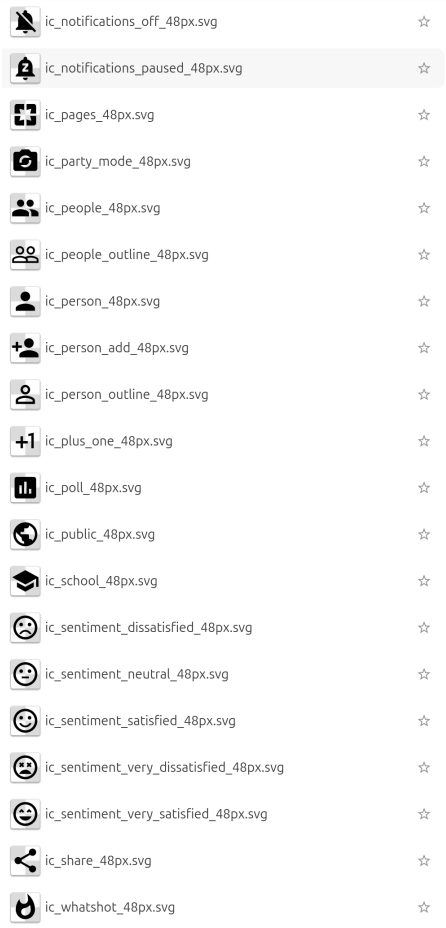


Figure B.53: Social Icons

B.16 Toggle Icons

This is a small set of selection symbols: empty and checked boxes, empty and filled round option buttons, on and off switches, and empty, half-filled, and full stars. Use these icons to build printable forms, checklists, ballots, and questionnaires. Empty boxes and circles give readers a place to mark their answers, and checked versions show completed examples. Stars are suited to ratings and reviews.

B.16.1 Toggle Icons Page 1

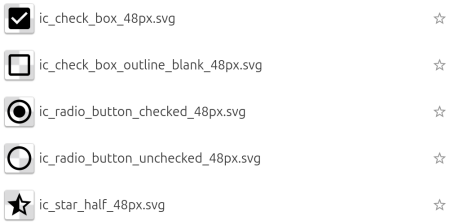


Figure B.54: Toggle Icons

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Adams Business Software Inc.
5910 Post Boulevard
STE 110258
Bradenton, FL 34211

Phone: (813) 400-0989
Mail: Sales@Confinet.US
Web: https://www.confinet.us

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