

eM⁴



Central Office Portal User Manual

For Version 1.0

Revision History

Revision	Comment	Author	Date
A	Initial Draft	Pvj	1/11/2007
B	Portal	DMB	07/4/2008

Contents

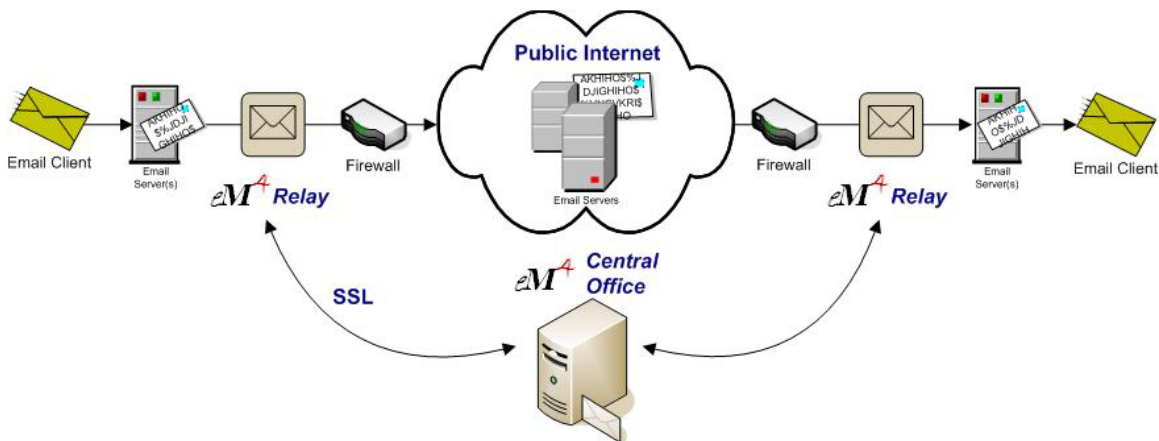
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PaperClip eM4 Compliant Email

PaperClip eM4 Compliant Email (eM4) is an Internet based electronic email encryption and D3P Level auditing service. It's "many to many" architecture allows simple connectivity and secure your confidential information effortless.

The eM⁴ approach resolves the many problems created in a diverse compliant industry:

- ✓ Encrypts Emails and their attachments firewall to firewall.
- ✓ Disinterested third party recording of Email transactions for auditing access.
- ✓ Email infrastructure independent, multiple deployment options.
- ✓ Ease of use accomplished, Subscriber's users don't have to learn something new.
- ✓ Commodity pricing, affordable by any size organization.



The following reference material refers to the Subscriber Portal.

The eM4 Subscriber Portal

The eM4 Portal web interface is designed to manage your subscription metrics, rules and reports.

The Portal is organized in several categories, Subscriber Administration, Current Status, Portal Users, Non Subscribers, Relay Server or Desktop Clients. The Portal is a secure site enforcing a SSL connection with three values required to login.

Logon starts with the unique Subscription ID, User Name and Password provided at time of registration. The Password provided by PaperClip will require changing upon initial logon. Passwords are assigned by the rules below:

Password Rules:

- ✓ Must be six or more characters.
- ✓ Password is case sensitive.
- ✓ Must have two special characters.
- ✓ Must be different from name.
- ✓ Cannot be the same as any of the six previous passwords.
- ✓ The hint cannot contain the password.

Example: #Yes&reaDY

Log In

PaperClip, Inc. eM⁴ Central Office Portal

Subscriber: ACME
Username: Scott Smith
Password: ●●●●●●

Log In

Forgot Password?

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Forgot Password will require your Subscriber ID and User Name. You are then challenged with your secret question where you reply with your answer. Success will email you, your password.

Forgot Your Password?

Enter your Subscriber Code and Username to reset your password.

Subscriber: ACME
Username: Scott Smith

Submit

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Identity Confirmation

Answer the following question to receive your password.

Username: ACME\Scott Smith
Question: What is your favorite sports team
Answer: _____

Submit

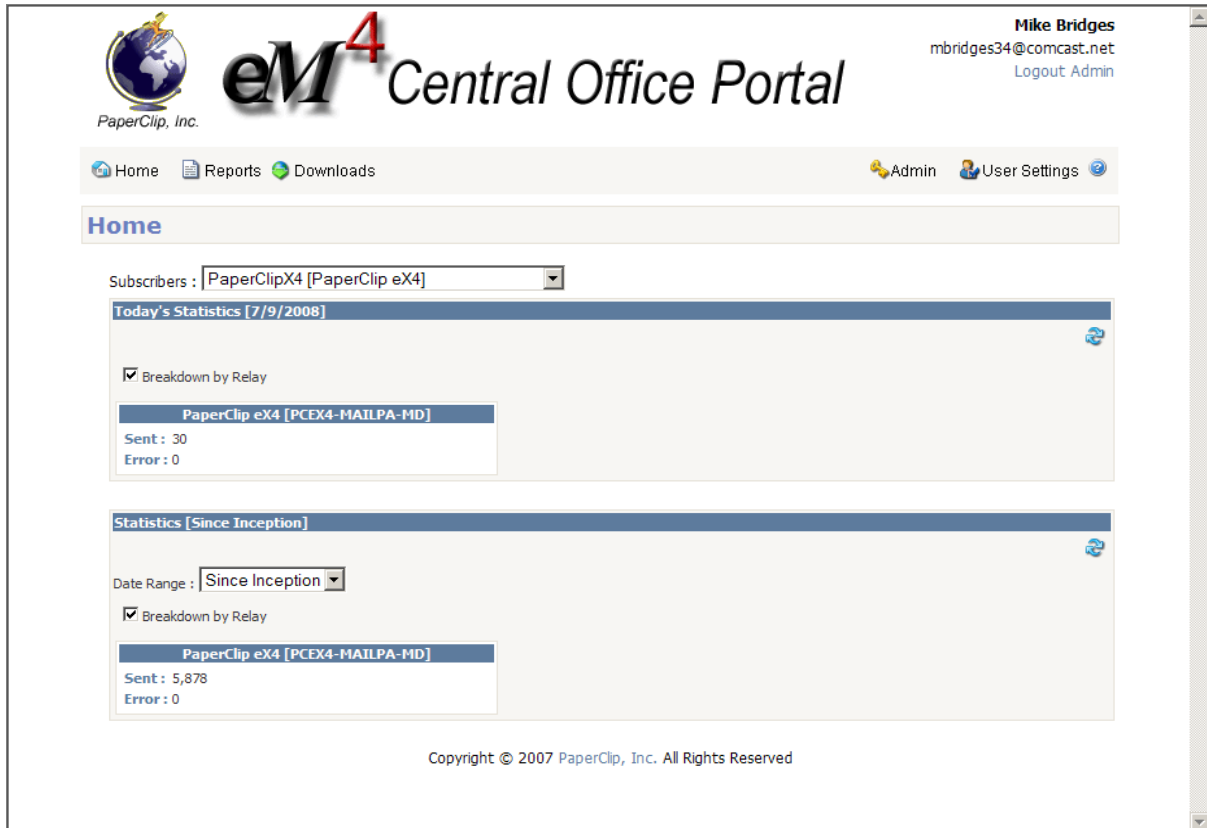
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Home Page

The eM4 Home Page is divided into three sections **Home**, **Reports** and **Downloads**. The Home page has three functions, **Statistics**, **Admin** and **User Settings**.

Statistics

Displays Today's and a user selected range of time options (10, 30, 90, Year and Since Inception).



The screenshot displays the eM4 Central Office Portal interface. At the top left is the PaperClip logo and the text "PaperClip, Inc.". To its right is the "eM4 Central Office Portal" title. In the top right corner, the user "Mike Bridges" is logged in, with the email "mbridges34@comcast.net" and links for "Logout" and "Admin". Below the title bar is a navigation menu with "Home", "Reports", and "Downloads" (all with icons), and "Admin" and "User Settings" (with icons). The main content area is titled "Home" and features a "Subscribers" dropdown menu set to "PaperClipX4 [PaperClip eX4]". There are two statistics sections:

- Today's Statistics [7/9/2008]**: Includes a checked "Breakdown by Relay" option. A table shows "PaperClip eX4 [PCEX4-MAILPA-MD]" with "Sent : 30" and "Error : 0".
- Statistics [Since Inception]**: Includes a "Date Range" dropdown set to "Since Inception" and a checked "Breakdown by Relay" option. A table shows "PaperClip eX4 [PCEX4-MAILPA-MD]" with "Sent : 5,878" and "Error : 0".

At the bottom of the page, it says "Copyright © 2007 PaperClip, Inc. All Rights Reserved".

Administration

The Administration functions provides for Subscription and Users management.

Subscribers

The screenshot shows the eM4 Central Office Portal interface. At the top left is the PaperClip, Inc. logo. To its right is the text "eM⁴ Central Office Portal". On the top right, the user "Mike Bridges" is logged in, with email "mbridges34@comcast.net" and a "Logout Admin" link. Below the header is a navigation bar with "Home", "Reports", and "Downloads" on the left, and "Admin" and "User Settings" on the right. A blue "Administration" banner is below the navigation. Underneath, there are two tabs: "Subscribers" (selected) and "Users". The "Subscribers" tab displays a table with the following data:

Subscriber	Users	
ACME	3	Manage

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Users

The screenshot shows the eM4 Central Office Portal interface. At the top left is the PaperClip, Inc. logo. To its right is the text "eM⁴ Central Office Portal". On the top right, the user "Mike Bridges" is logged in, with email "mbridges34@comcast.net" and a "Logout Admin" link. Below the header is a navigation bar with "Home", "Reports", and "Downloads" on the left, and "Admin" and "User Settings" on the right. A blue "Administration" banner is below the navigation. Underneath, there are two tabs: "Subscribers" and "Users" (selected). The "Users" tab displays a table with the following data:

Name	Username	
Bridges, Mike	ACME\ Admin	Manage
Smith, Scott	ACME\ Scott Smith	Manage
Sydner, Kevin	ACME\ Sydner	Manage

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Select Manage to edit.

Manage Subscriber

Properties Tab

Complete all information for Company and point of Contact.

Email - the address for the support group.

Reply Email - the address to reply to.

Active – *View only*. Relay can communicate to Central Office.

Publish – *View only*. List domains to other Relays.

Sponsored Web Mail User Message View Action –

Allow Unregistered

This does not require the receiver of a Web Mail to authenticate.

Require Registration

Requires the receiver to register themselves and maintain a login and password to view Web Mail.

Sponsored Web Mail User Limit –

The total number of Sponsorships acquired for a giving year.

Sponsored Web Mail Users Expiration Date -

Date the Sponsored Subscription expires.

Sponsored User List Load Mode -

Auto Load

This will assign every Non-Subscriber receiver automatically as a Sponsored Subscriber.

Managed

Can Import a list of email addresses or Add Sponsored Subscriber as required.

The screenshot displays the eM4 Central Office Portal interface. At the top, there is a navigation bar with links for Home, Reports, and Downloads. The user is logged in as Mike Bridges (mbridges34@comcast.net). The main content area is titled "Administration" and shows a "Subscribers" tab with a table listing subscribers. The "Manage Subscriber" form is open, showing the "Acme Company Properties" for subscriber code "ACME". The form includes fields for Name, Address, City, State, Zip Code, Contact Name, Contact Phone, Contact Fax, Contact Email, Email, and Reply Email. There are also checkboxes for "Active" and "Publish", and dropdown menus for "Sponsored Web Mail User Message View Action" (set to "Allow Unregistered"), "Sponsored Web Mail User Limit" (set to 100), "Sponsored Web Mail Users Expiration Date" (set to 7/8/2008), and "Sponsored User List Load Mode" (set to "AutoLoad"). A "Save" button is located at the bottom right of the form.

Subscriber	Users	Manage
ACME	3	

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Home Reports Downloads

Manage Subscriber

Properties Users Relays Sponsored Users Desktop Users

Acme Company Properties

Subscriber Code : ACME

Name : Acme Company

Address : 1 Long Street

Address 2 :

City : Any City

State : NJ

Zip Code : 08753

Contact Name : John Doe

Contact Phone : 732-555-1212

Contact Fax : 732-555-1313

Contact Email : mbridges@paperclip.com

Email : NB@Acme.com

Reply Email : NB@Acme.com

Active :

Publish :

Sponsored Web Mail User Message View Action : Allow Unregistered

Sponsored Web Mail User Limit : 100

Sponsored Web Mail Users Expiration Date : 7/8/2008

Sponsored User List Load Mode : AutoLoad

Save

Users Tab

The screenshot shows the 'Users Tab' interface for the eM4 Central Office Portal. At the top left is the PaperClip, Inc. logo. The main title is 'eM4 Central Office Portal'. On the top right, the user 'Mike Bridges' is logged in, with email 'mbridges34@comcast.net' and a 'Logout Admin' link. A navigation bar includes 'Home', 'Reports', 'Downloads', 'Admin', and 'User Settings'. The main content area is titled 'Manage Subscriber' and has tabs for 'Properties', 'Users', 'Relays', 'Sponsored Users', and 'Desktop Users'. The 'Users' tab is active, showing a table of 'Acme Company Users' with columns for 'Name', 'Username', and 'Remove'. The table lists three users: Mike Bridges (Admin), Scott Smith (Scott Smith), and Kevin Sydner (Sydner). A 'Users Not In Subscriber' section shows 'No Items to display'. A 'Done' button is at the bottom right. Copyright information for 2007 PaperClip, Inc. is at the bottom center.

Mike Bridges
mbridges34@comcast.net
Logout Admin

Home Reports Downloads Admin User Settings

Manage Subscriber

Properties **Users** Relays Sponsored Users Desktop Users

Acme Company Users		
Subscriber Users		Users Not In Subscriber
Name	Username	No Items to display
Bridges, Mike	Admin Remove	
Smith, Scott	Scott Smith Remove	
Sydner, Kevin	Sydner Remove	

Done

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Administrator can only remove User from Portal access. This does not delete the User.

Relay Tab

The Relay screen is where your Subscription is defined by PaperClip.

Note - All values are Read Only.

Subscriber – Unique Subscription ID.

Relay Name - A Subscriber can have more than one relay installed. Each Relay must be uniquely named.

Type – Subscriber is default. The other option is to deploy a completely branded Web Mail Server to support the subscriber exclusively.

Web Mail Relay – The Web Mail Server assigned to support Non Subscribers.

Mode – PaperClip support controls the operations of your service.

Production

Your Relay will be published to only the Production Relays and Desktops.

Test

Your Relay will be published to only the Test Relays and Desktops.

Both

Your Relay will be published to all the Production and Test Relays and Desktops.

Domains – All the supported domains for encryption rules.

Connection File – Required for eM4 Relay Server installation.

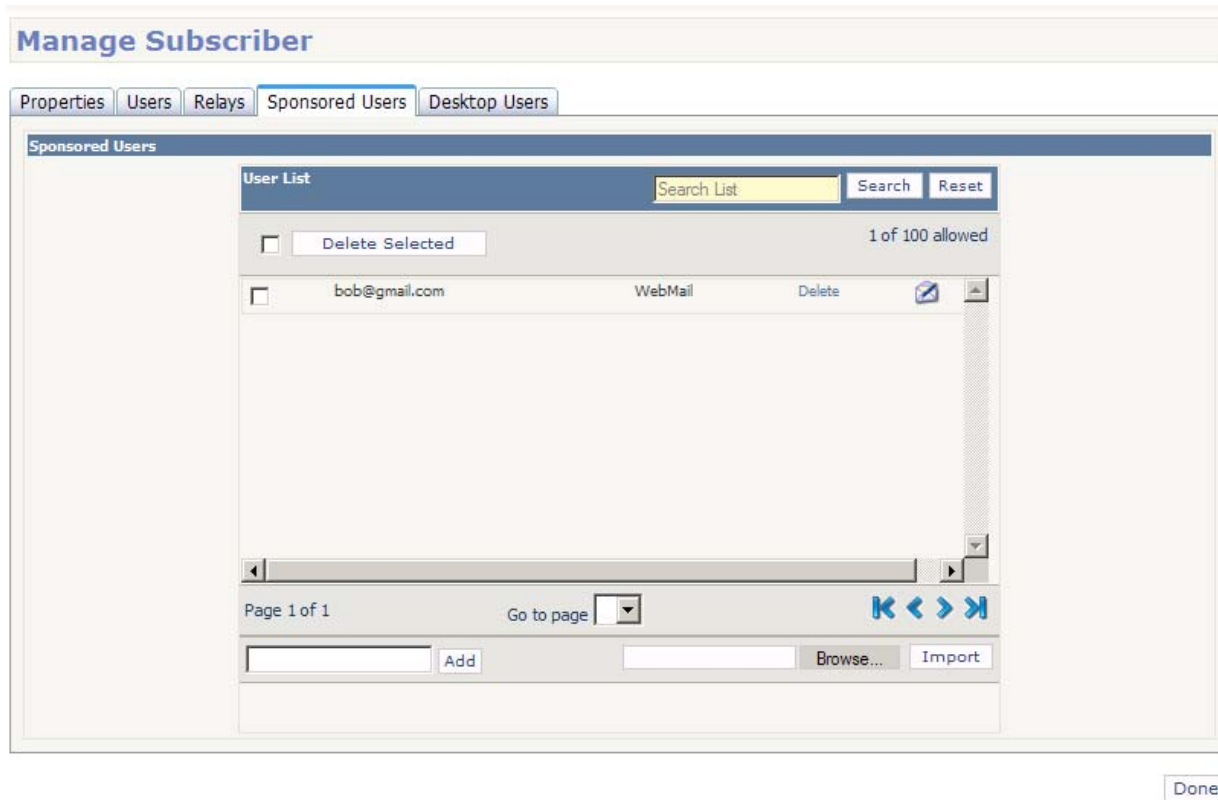
The screenshot shows the 'eM4 Central Office Portal' interface. At the top, there is a navigation bar with 'Home', 'Reports', and 'Downloads' links, and a user profile for 'Mike Bridges' with email 'mbridges34@comcast.net' and 'Logout Admin' link. Below this is a 'Manage Subscriber' section with tabs for 'Properties', 'Users', 'Relays', 'Sponsored Users', and 'Desktop Users'. The 'Relays' tab is active, showing a table with one entry. A modal window titled 'Edit Relay' is open, displaying the following fields: 'Subscriber' (PaperClipX4), 'Relay Name' (PCEX4-MAILPA-MD), 'Type' (Subscriber), 'Web Mail Relay' (pcWebMail), and 'Mode' (Production). There is a 'Download Connection File' button and a 'Domains' table with one entry: 'pclipex4.net' with 'Edit Delete' links. At the bottom of the modal are 'Ok' and 'Cancel' buttons.

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Sponsored Users Tab

A Sponsored User or eM4Lite User has special features allowing them access to Desktop deployment and Web Mail. In addition they can initiate an encrypted email to their Sponsor only. An eM4Lite user can have more than one sponsor.

Administrator can manage email address via three options, Sponsored User List Load Mode set to Auto Load, Import a list of email address and by keying in email addresses.



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Import List Format

```
<email address one><CR>  
<email address two><CR>  
<email address three><CR>  
<email address four><CR>
```

Browse – Windows file browse to locate Import text file.

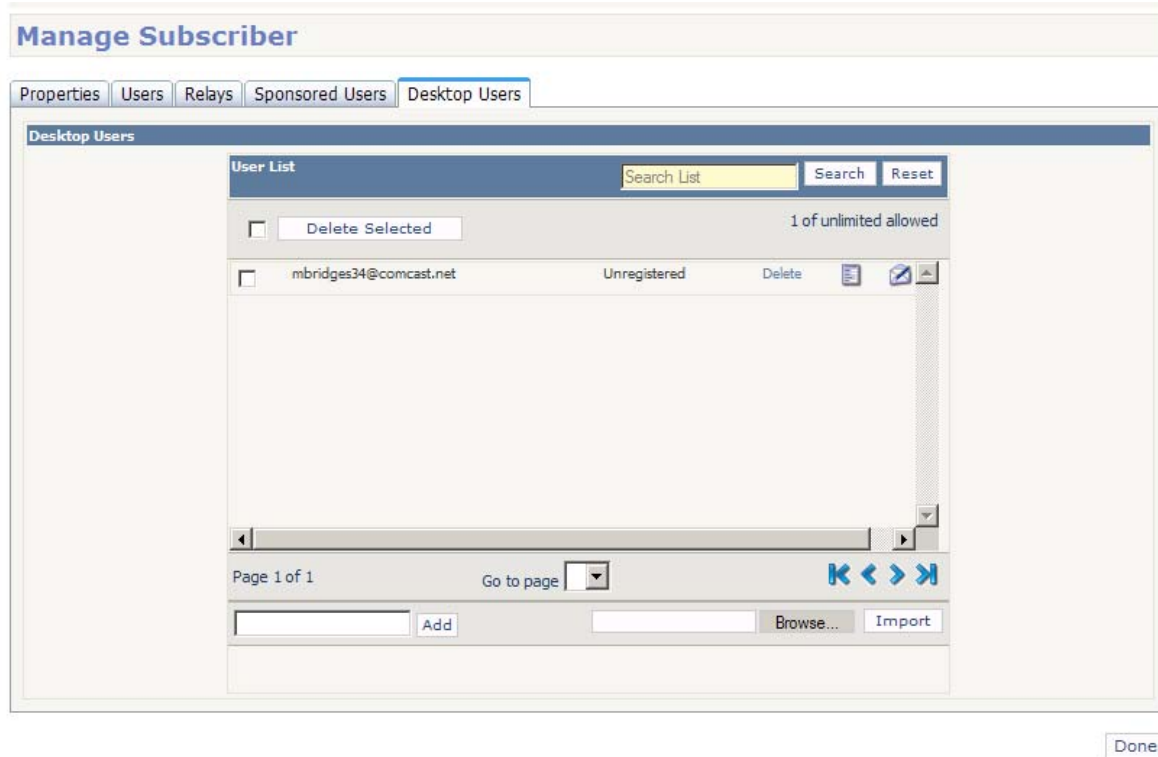
Import – Read list and update Sponsor's Subscribers.

Add – Enter one Email address.

Desktop Users Tab

Desktop Users is a list of Email Addresses associated with a Subscription.

Note – A Subscriber can deploy an eM4 Relay Server or Desktop Clients. You cannot mix Relay Servers with Desktop Clients.



Import List Format

```
<email address one><CR>  
<email address two><CR>  
<email address three><CR>  
<email address four><CR>
```

Browse – Windows file browse to locate Import text file.

Import – Read list and update Sponsor's Subscribers.

Add – Enter one Email address.

User Settings

User Settings allow you to manage your current login information.

Account Settings

The screenshot shows the eM4 Central Office Portal interface. At the top left is the PaperClip, Inc. logo. To its right is the text "eM4 Central Office Portal". On the top right, the user's name "Mike Bridges" is displayed, along with the email "mbridges34@comcast.net" and a "Logout Admin" link. Below the header is a navigation bar with links for "Home", "Reports", "Downloads", "Admin", and "User Settings". The "User Settings" section is active, showing two tabs: "Account Settings" and "Display Settings". Under "Account Settings", the following information is displayed: Subscriber: ACME, Username: Admin, Last Name: Bridges, and First Name: Mike. There are two buttons: "Edit Profile" and "Change Password". At the bottom of the page, the copyright notice "Copyright © 2007 PaperClip, Inc. All Rights Reserved" is visible.

Edit Profile

Fields not grayed out can be updated.

Edit Profile

The "Edit Your Profile" dialog box contains the following fields: Subscriber (grayed out, value: ACME), Username (value: Admin), E-mail (value: mbridges34@comcast.net), First Name (value: Mike), Last Name (value: Bridges), Security Question (dropdown menu with value: What is the model of your first car), and Security Answer (value: Corvette). There are "Ok" and "Cancel" buttons at the bottom.

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Change Password

To change your password you'll need your current password.

Change Password

The "Change Your Password" dialog box contains three password input fields: "Password:", "New Password:", and "Confirm New Password:". There are "Change Password" and "Cancel" buttons at the bottom.

Password must be at least 6 characters long and it must contain at least 2 special character(s)

User Settings Tab

User Setting allows the logged in user to customize their background color and the length of their report displays.

The screenshot shows the eM4 Central Office Portal interface. At the top left is the PaperClip, Inc. logo. The main header features the eM4 logo and the text "Central Office Portal". On the top right, the user's name "Mike Bridges" is displayed along with the email "mbridges34@comcast.net" and a "Logout Admin" link. Below the header is a navigation bar with links for "Home", "Reports", and "Downloads", and buttons for "Admin" and "User Settings". The "User Settings" section is active, showing two tabs: "Account Settings" and "Display Settings". Under "Display Settings", there is a "Theme" dropdown set to "Default". Below this are three sections: "Reports Display Settings" with a "Reports Page Size" dropdown set to "10"; "Admin Display Settings" with three dropdowns for "Subscriber User List Page Size", "User List Page Size", and "Sponsored Web User List Page Size", all set to "10" entries. At the bottom of the settings area are "Ok" and "Cancel" buttons. A copyright notice "Copyright © 2007 PaperClip, Inc. All Rights Reserved" is located at the bottom center of the page.

Manage Users

List all the configured Users in the portal. Select manage to edit User information.



The screenshot shows the eM4 Central Office Portal Administration interface. At the top, there is a logo for PaperClip, Inc. and the text "eM4 Central Office Portal". The user "Mike Bridges" is logged in, with the email "mbridges34@comcast.net" and a "Logout Admin" link. The navigation bar includes "Home", "Reports", "Downloads", "Admin", and "User Settings". The "Administration" section is active, with "Subscribers" and "Users" tabs. The "Users" tab is selected, showing a table of users:

Name	Username	Manage
Bridges, Mike	ACME\ Admin	Manage
Smith, Scott	ACME\ Scott Smith	Manage
Sydney, Kevin	ACME\ Sydney	Manage

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The screenshot shows the eM4 Central Office Portal "Manage User" interface. At the top, there is a logo for PaperClip, Inc. and the text "eM4 Central Office Portal". The user "Mike Bridges" is logged in, with the email "mbridges34@comcast.net" and a "Logout Admin" link. The navigation bar includes "Home", "Reports", "Downloads", "Admin", and "User Settings". The "Manage User" section is active, showing a form to edit user information:

Edit User Delete User

Subscriber:

Username:

E-mail:

First Name:

Last Name:

Password: !

Confirm Password:

Security Question:

Security Answer:

Roles:

- Admin
- Audit
- SubscriberAdmin
- User

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Reports

eM4 traffic is stored at the Relay or Desktop and at different times in the day, pushes the email metadata to the Central Office for auditing purposes. The metadata captured includes:

- ✓ From Address
- ✓ To, CC, BC Addresses
- ✓ Subject line
- ✓ Attachment file names
- ✓ Various Unique IDs
- ✓ Various Date/Time stamps

This metadata is made available for Subscribers' use. Access to Reports is limited to a configured user role called "Audit". Audit is a special user role designed to only view reports. This feature creates a use case where Third Party Auditors could gather information but not have access to any other portal features. Administrator role does have access to Subscriber's Report which list all the active Subscriber IDs. User Smith has User and Audit roles enabled but not Admin, therefore there is not Admin button displayed.



eM⁴ Central Office Portal

Scott Smith
ssmith@comcast.net
[Logout Scott Smith](#)

[Home](#) [Reports](#) [Downloads](#)

[User Settings](#)

Reports

Report

Relay Audit Report	Build usage report based on dates, email addresses, subject, and type
Monthly Relay Usage Report	Monthly report on sent activity for all relays for subscriber
Subscriber List	List of all Subscribers and their domains

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Relay Audit Report

This report allows drilling in on specific elements of the metadata for a focused search. Result list can be further detailed by selecting the page icon on the far left of the list item documenting date & time stamps for change of custody.

Relay Audit Report

Report Builder
(Hide...)

Subscribers :

Email Types : Sent Received Error

From Date : To Date :

From Email :

To Email :

Subject :

Attachment List :

						Records 61 to 80 of 249
7/8/2008 12:45:15 PM	PaperClip eX4	ex4test@pclipex4.net	dkariberg@paperclip.com	Paperclip North NJ - Daily Document MetaData Report - For : 7/7/2008	Sent	
7/8/2008 12:45:14 PM	PaperClip eX4	ex4test@pclipex4.net	davek@warwick.net	Paperclip North NJ - Daily Document MetaData Report - For : 7/7/2008	Sent	
7/8/2008 12:45:05 PM	PaperClip eX4	ex4test@pclipex4.net				

Email Details

From Address : ex4test@pclipex4.net

To Address: scott@exit82.net

Accepted To Address: scott@exit82.net

Subject : PaperClip Testing South - Daily Document MetaData Report - For : 7/7/2008

Attachments : DailyErrorDocument.csv, DailyErrorDocument.pdf

Event History

Event	Enterprise Date	Internet Date	Relay	Relayed To List
Sent	7/8/2008 12:45:05 PM	7/8/2008 12:45:05 PM	PCEX4-MAILPA-MD	scott@exit82.net
Received	7/8/2008 12:44:51 PM	7/8/2008 12:44:50 PM	MDaemon-X82	scott@exit82.net
sent successfully				

Report can be exported as a PDF file format and stored locally.

Monthly Relay Usage Report

Reports the traffic for the selected month in chronological order.

Report can be exported as a PDF file format and stored locally.

Monthly Relay Usage Report

Report Parameters
(Hide...)

Subscribers :

Month : Year :

Date	Subscriber	From Address	To Address	Subject	Status	
7/9/2008 12:04:04 AM	PaperClip eX4	ex4test@pclipex4.net	davek@warwick.net	Paperclip North NJ - Daily Document MetaData Report - For : 7/8/2008	Sent	
7/9/2008 12:04:04 AM	PaperClip eX4	ex4test@pclipex4.net	dkarlberg@paperclip.com	Paperclip North NJ - Daily Document MetaData Report - For : 7/8/2008	Sent	
7/9/2008 12:03:56 AM	PaperClip eX4	ex4tes				
7/9/2008 12:03:55 AM	PaperClip eX4	ex4tes				
7/9/2008 12:03:29 AM	PaperClip eX4	pcex4		PaperClip Testing South - Daily Document MetaData Report - For : 7/8/2008		
7/9/2008 12:03:28 AM	PaperClip eX4	pcex4				
7/9/2008 12:03:28 AM	PaperClip eX4	pcex4				
7/9/2008 12:03:19 AM	PaperClip eX4	pcex4				

Email Details

From Address : ex4test@pclipex4.net

To Address: ssmith@paperclip.com

Accepted To Address: ssmith@paperclip.com

Subject : PaperClip Testing South - Daily Document MetaData Report - For : 7/8/2008

Attachments : DailyErrorDocument.csv, DailyErrorDocument.pdf

Event History

Event	Enterprise Date	Internet Date	Relay	Relayed To List
Sent	7/9/2008 12:03:56 AM	7/9/2008 12:03:58 AM	PCEX4-MAILPA-MD	ssmith@paperclip.com
Received	7/9/2008 12:06:17 AM	7/9/2008 12:03:41 AM	pcWebMail	ssmith@paperclip.com
sent successfully				

Subscriber List

List all the Subscriber Company names, Subscriber IDs and Domain(s).

Report can be exported as a PDF file format and stored locally.

Subscriber List

Export to PDF

Subscriber	Subscriber Code	Domain
PaperClip, Inc.	PaperClip	karlberg@us.paperclipem4.net
PaperClip, Inc.	PaperClip	suleski@us.paperclipem4.net

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Downloads

The Administrator can download the necessary software to install the eM4 Relay Server or the Desktop Client. Refer to their respective User Guides for installation detail.



eM⁴ Central Office Portal

Mike Bridges
mbridges34@comcast.net
[Logout Admin](#)

[Home](#) [Reports](#) [Downloads](#)

[Admin](#) [User Settings](#)

Downloads

File	
eM4 Relay Setup	Setup for installation of a new eM4 SMTP Relay (ver 1.0.0.43)
eM4 Outlook Add-in Setup	Setup for installation MS Outlook Add-in (Alpha build 105)

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