Secure E-mail and File Transfer Service User Guide

Version 3.0

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Logging In to/Registration for the Secure E-mail and File Transfer Service

Go to: https://secureemail.nih.gov/bds/Main.do
Result: The Secure E-mail and File Transfer Logon page will display. (fig. 1)

1. **Enter your Username (1).**
   NIH users should use only their NIH domain and login name (ex. nih\doej). Non-NIH users should use the email address to which they were first sent a secure package. Upon initial login this email address will become your username.

2. **Enter your Password (2).**
   NIH users will use their NIH login password.
   2a. If you have forgotten your password you can reset your NIH login password by clicking the 'Forgot your password?' link on the logon page and following the instructions.
   2b. If you are a new user you can request a password by clicking the "New User – Request your Password…" link on the logon page.
   Note: For non-NIH users, your password must contain at least one upper-case letter, one lower-case letter, one number and one special character. For further guidance see Section 8, Changing Your Password.

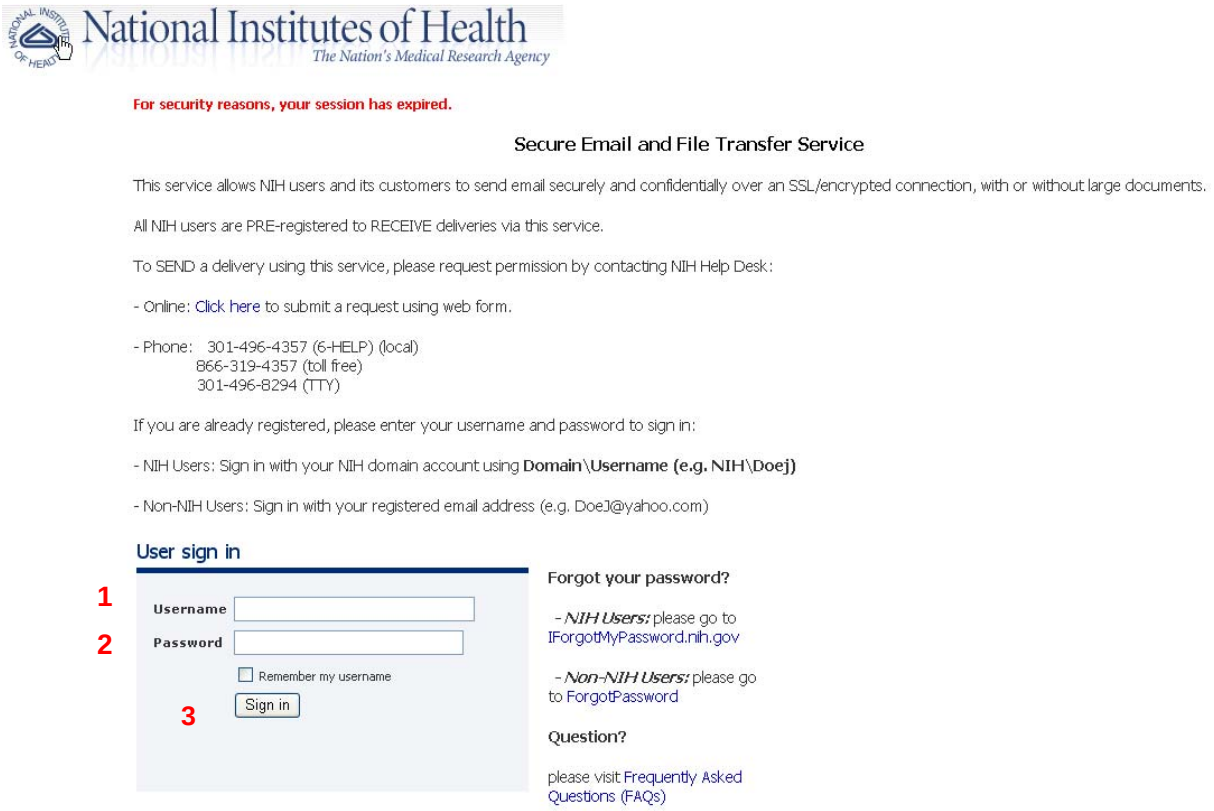


Fig. 1 - Secure E-mail and File Transfer Service log in page

3. **Click on the 'Sign in' button (3).**
   Result: You are now logged into the Secure Email system. Non-NIH users will be taken to the User Registration area.

Registration

4. **Non-NIH User Registration.**
   Non-NIH users will have to register (**4**) upon first accessing the application.

5. **Completing the Non-NIH User Registration**
   Once you have decided on a password, and entered it a second time (**5**), you will need to select and answer your security questions.

Fig. 2 – Non-NIH User registration page

6. **Click on the 'Register' button (6).**
   Result: You are now registered for and logged into the Secure Email system. Non-NIH users will be taken to the User Registration area (fig. 2).
   Note: NIH users that require the ability to send as well as receive secure email packages will need to request permission by contacting the NIH Help Desk, requesting "Send" capability be added to their Secure Email and File Transfer Service account or online using web form found on the logon page.

Your Secure E-mail and File Transfer Service Home page

7. Your Secure Email Home page.

From here you will be able to access the Secure Email and File Transfer functions permitted by your level of access; either as a "Receive only" user, or as a "Send & Receive" user.

7a. Receive ONLY users will see the basic Home page (fig. 3). From here you can only access packages you have Received, your Contacts page, and the Help menu. These are each explained more in-depth later in this guide.

Fig. 3 – Receive ONLY Users Home page

Your Secure E-mail and File Transfer Home page (continued)

7b. In addition to those capabilities, Send and Receive users will also be able to view from their Home page (fig. 4) the Sent packages, Create a Secure Message, Manage Packages, and View Reports pages. These are explained more in depth in subsequent sections.

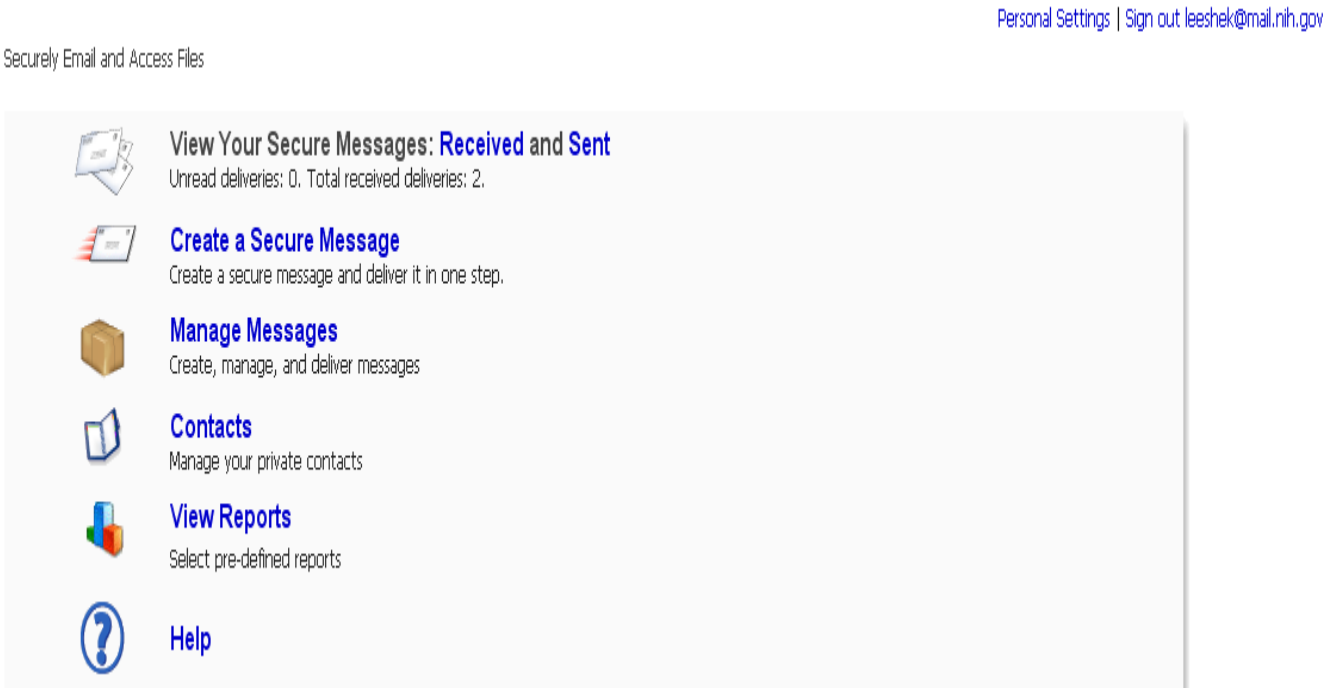


Fig. 4 – Send and Receive Home page

Your Secure E-mail and File Transfer Service Profile

8. Updating Your Profile/Personal Settings.

The Personal Settings link in the upper right-hand corner of every screen with take you to the Update Profile page (fig. 5). This page contains information on your profile within the SEFT application. NIH users will not be able to update any information on this page as it is pulled directly from the NIH Employee Directory (NED). Non-NIH users have the ability to update this information as it relates to their profile. Those wishing to change/update their Password Reset Question, Answer, and Hint can do so from this page.

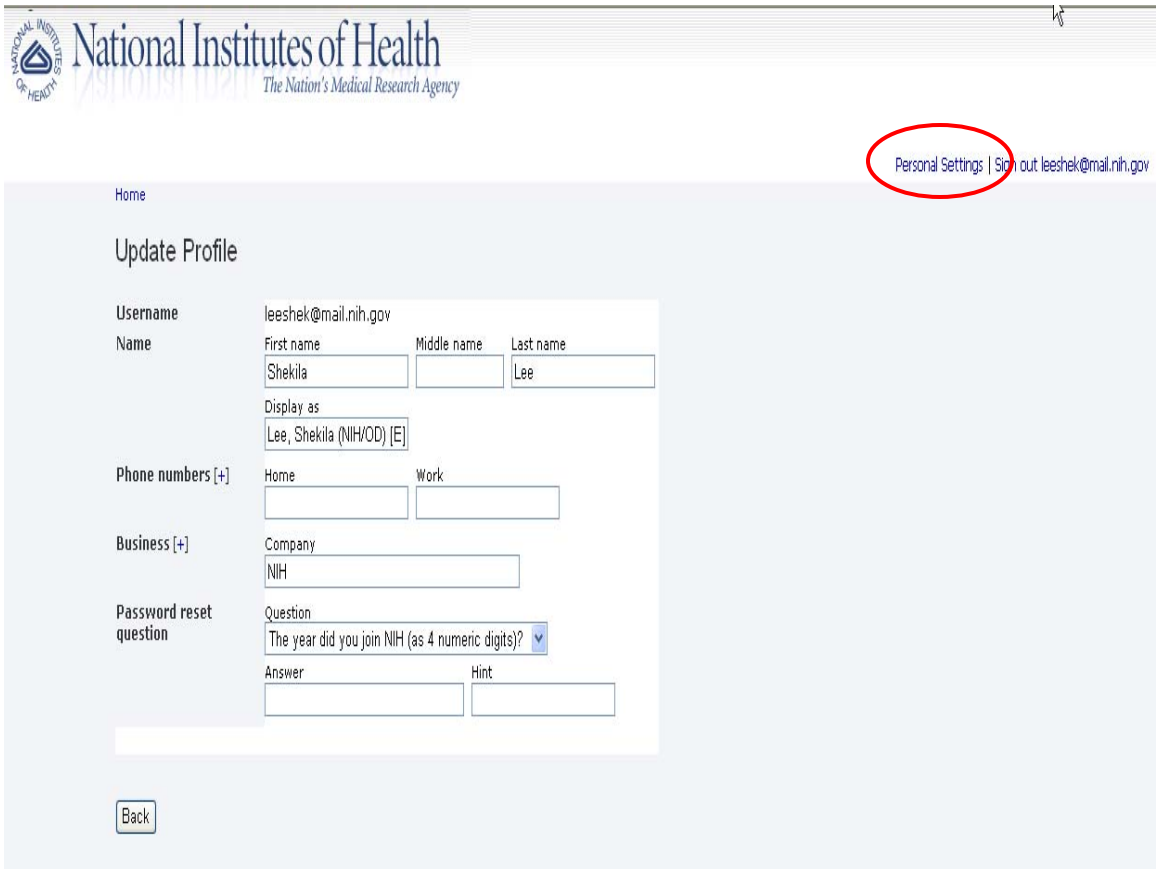


Fig. 5 – Personal Settings/Profile Update

Note: Due to NIH users passwords being managed by the network and not the Secure Email application, NIH users are not permitted access to this functionality.

Secure E-mail Password Resets

9. Password Resets.

NIH users are unable to reset their access password via the SEFT application.
For non-NIH users: Clicking the "Forgot Password" link from the login page will bring you to **Forgot Password** page (fig. 6) where you must enter the email address through which you have registered to access SEFTS and click the "submit" button.

Fig. 6 – Password Reset

Result: You will be taken to the **Reset Password** page (fig. 7) where you will be able to create your new password.

Secure E-mail password Resets (continued)

10. Answer your reset question (10).
Correctly answer your reset question then enter and confirm your new password; then click the "submit" button.

Fig. 7 – Password Reset

Result: You will be taken back to the login page (fig. 1 – pg. 3) where you will be able to login in with your new password.

Note: To reset your password you must have previously selected a password reset question and answer. If you managed to complete the registration process without doing so, or, have forgotten the answer to your security question, your only recourse is to email the Secure Email and File Transfer Systems Admin (NIHSecureFileDeliveryAdmin@mail.nih.gov) requesting to have your password manually reset.

Received and Sent Deliveries

11. Viewing your Delivered packages.

When a secure email or file "package" is delivered to your account you will receive an email notification to the inbox of the email account associated with your access to the SEFT application. This email notification will include a link through which you can access the SEFT application and view the package and any attachments. If you have received multiple packages available the deliveries received page will help you determine which packages contents you wish to view.

From your home page (see: sec. 7, fig. 3) all users can select Received deliveries to view a history of secure packages you have received (fig. 8).

Fig. 8 – Received Deliveries

Each Received package will display the subject, received date, last activity date, and the package expiration date.

Received and Sent deliveries (continued)

12. Viewing your Sent Deliveries.

When you create an Express Delivery (see Express Deliveries, sec. 13), or Create a Package (sec. 14) for future delivery, the package is tracked within your account from the deliveries sent page.

From your home page (see: sec. 7, fig. 4) NIH users with Send capability can select Sent deliveries to view a history of secure packages you have sent (fig. 9).

Recipients	Subject	Sent	Last activity	Expires
Toomey, Laura (NIH/OD) [E]	asfdg	07/02/2008 11:39 AM	07/02/2008 11:42 AM	07/09/2008 11:38 AM
toomeyl@gmail.com	aefgae	07/02/2008 11:38 AM	07/02/2008 11:38 AM	07/09/2008 11:37 AM
lmtoomey@gmail.com	test 2	07/02/2008 11:35 AM	07/02/2008 11:35 AM	07/09/2008 11:35 AM
Toomey, Laura (NIH/OD) [E]	Test e-mail	07/02/2008 11:33 AM	07/02/2008 11:33 AM	07/09/2008 11:30 AM
grimesca@mail.nih.gov	Test e-mail-checked box	07/02/2008 09:58 AM	07/02/2008 09:58 AM	07/09/2008 09:57 AM
shekila.lee@gmail.com	Test e-mail 2	07/02/2008 09:46 AM	07/02/2008 09:46 AM	07/09/2008 09:44 AM
Troy Patterson	OD-box checked	07/02/2008 09:43 AM	07/02/2008 09:46 AM	07/09/2008 09:37 AM
shekila.lee@gmail.com	Test e-mail	07/02/2008 09:34 AM	07/02/2008 09:48 AM	07/09/2008 09:28 AM
Troy Patterson	Document attached	07/02/2008 09:28 AM	07/02/2008 09:29 AM	07/09/2008 09:27 AM
patterson2@od.nih.gov	Document attached	07/02/2008 09:27 AM	07/02/2008 09:27 AM	07/09/2008 09:25 AM
Troy Patterson	Please review	07/02/2008 09:25 AM	07/02/2008 09:26 AM	07/09/2008 09:22 AM
Jones, Antoine (NIH/OD) [E]	Test	07/01/2008 11:46 AM	07/01/2008 11:58 AM	07/08/2008 11:40 AM

Fig. 9 – Sent Deliveries

Each package will display the recipients, subject, sent date, last activity date, and the package expiration date.

Note: Only NIH users; and, only those NIH users who have specifically requested Send capability through the Secure Email and File Transfer Systems Administrators will be able to see/utilize this function. If you require Send capability for your job function you can easily request this via email to the Secure Email and File Transfer Systems Administrators at: NIHSecureFileDeliveryAdmin@mail.nih.gov with a subject line of: Secure Email Account Request, and state your request to have this added to your account.

Secure Message

13. Secure Message.

NIH users with "send" capabilities will have the option to select **Secure Message** (fig. 10) from their home page, once they have logged in (sec. 7b, fig. 4). Addressing your secure package is the same as any normal email application; "To," "Cc," "Bcc," and "Subject" all function as expected.

Information typed into the "Secure Message" box (**13a**) will NOT display in the recipients' message notification email. If you only need to convey static information, without attachments, this would be the ideal place to include such data.

Information placed in the "Message Notification" box (**13b**) WILL display as a part of the message recipients' notification email. A basic notification message will display. You can use the default message, or craft one of your own.

Note: You should NEVER put "sensitive" information in the message notification box as it will not be sent in a secure manner.

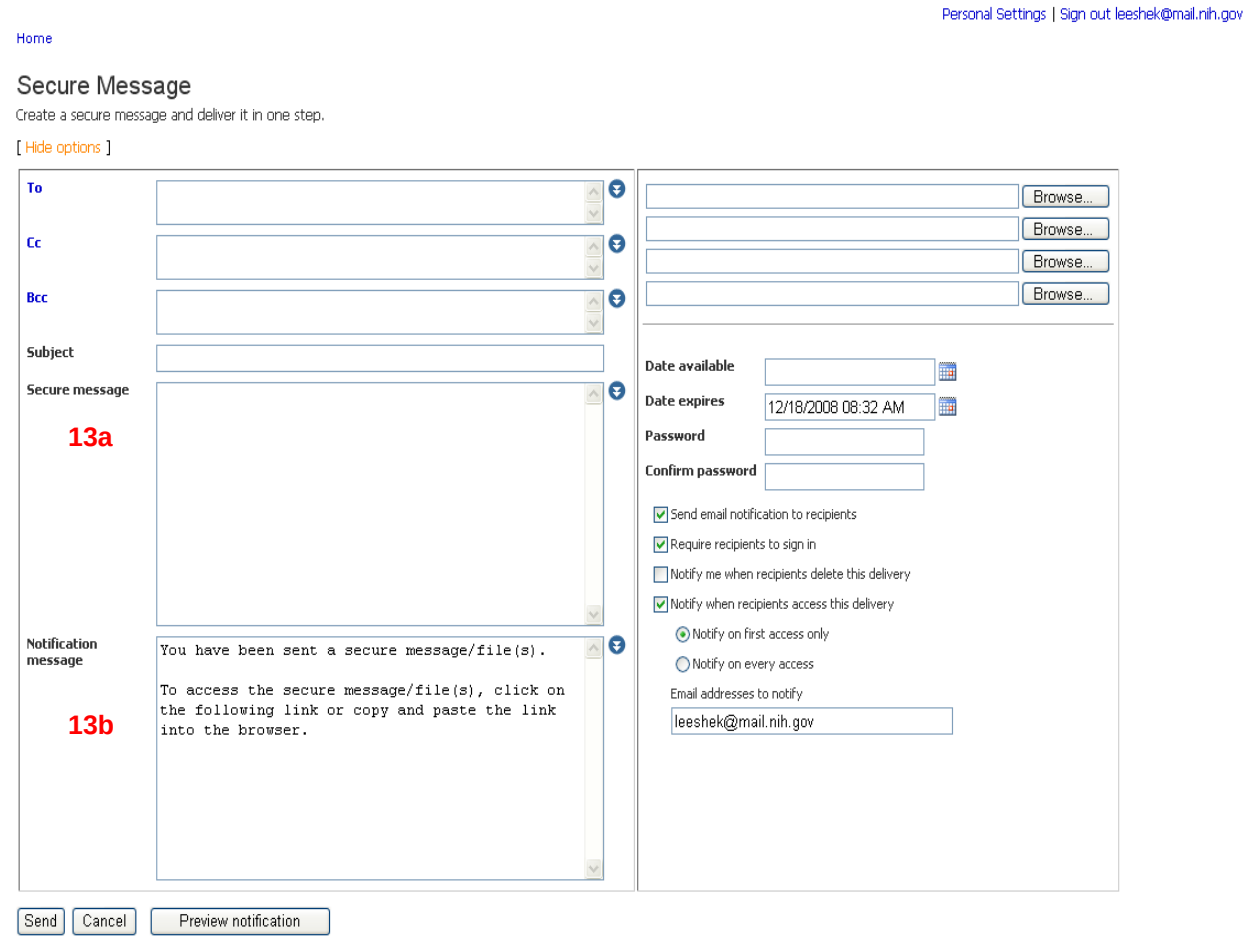


Fig. 10a – Secure Messages

Secure Message (continued)

To attach files to your secure package simply click on one of the “browse” buttons (**13c**) and navigate to the folder where the file is located

The “Date Available,” and “Date Expires” function (**13d**) allows you to define when and for how long access to the package will be granted.

Assigning a password to a package (**13e**) adds an extra level of security to package access, but you must convey the password to your recipients through a medium other than the SEFTS application.

The remaining default settings below the password confirmation box (**13f**) are self-explanatory, and would best be left as-is.

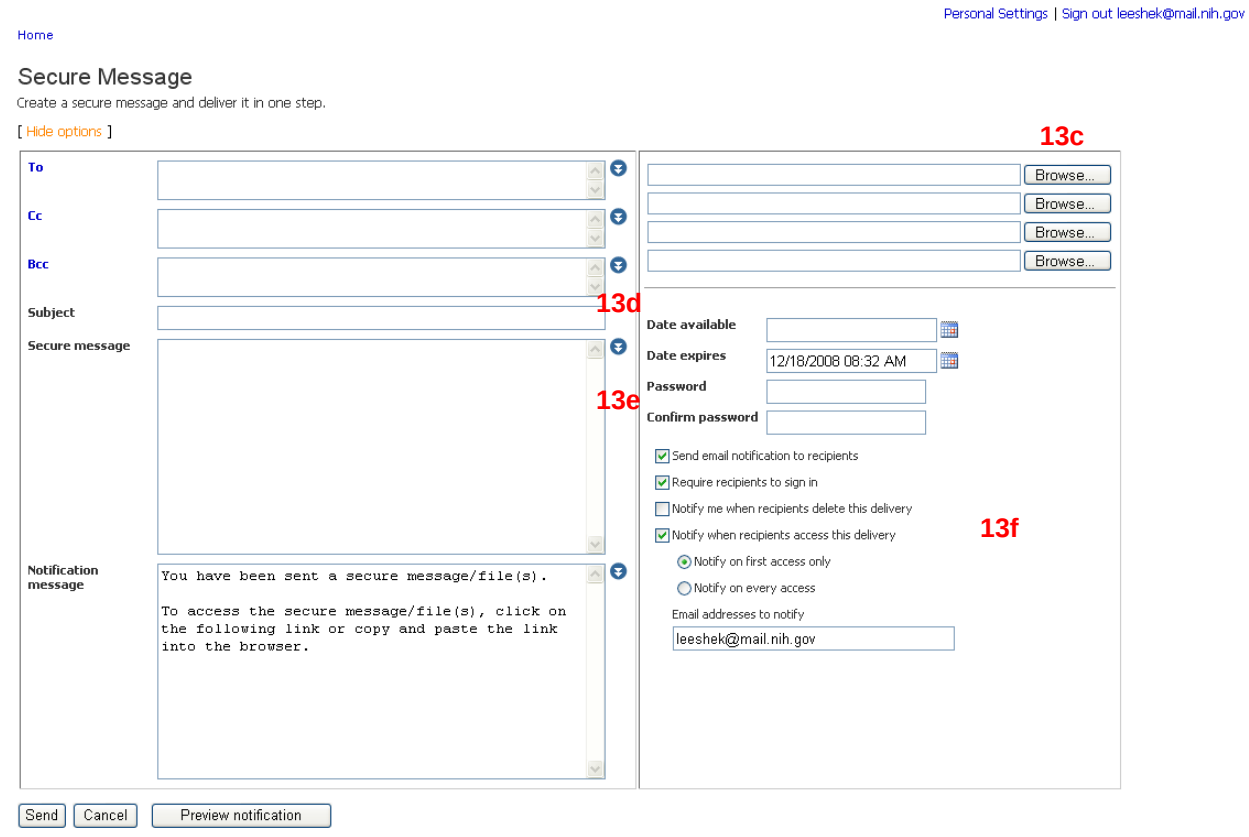


Fig. 10b – Secure Message (cont.)

Create Packages

14. Create a Package.

NIH users with “send” capabilities have the option to Create, Manage and Deliver packages.

To create a package you must first click on the “Manage Packages” link from your SEFT home page (see: sec. 7b, fig. 4), then click the “Create Package” link from the Manage Packages page (fig. 11).

Fig. 11 – Create/Manage Packages

Create Packages (continued)

15. Create a Package.

At the Create Package page you must provide a name for your package (**15a**). Labels or additional description information is optional.

Adding "Additional Owners" (**15b**) gives these individuals equal rights (must be NIH users with "send" capabilities) with the ability to manipulate the package(s) you have created. Non-NIH users cannot be included as additional package owners.

Adding "Senders" (**15c**) means these names/email addresses will display as senders in the Package Notification Email that recipients receive. Non-NIH users cannot be included as additional senders.

As with Secure Messages, uploading files to a package (**15d**) is handled by clicking on the "Browse" button and surfing to any file-folder you currently have access to (including network- or shared-drives), followed by clicking on the file you wish to add. Much like you do with any common email application. You are limited to 4-attachments when creating a package, but can, when needed, go back into "manage a package" (see below) and add additional attachments.

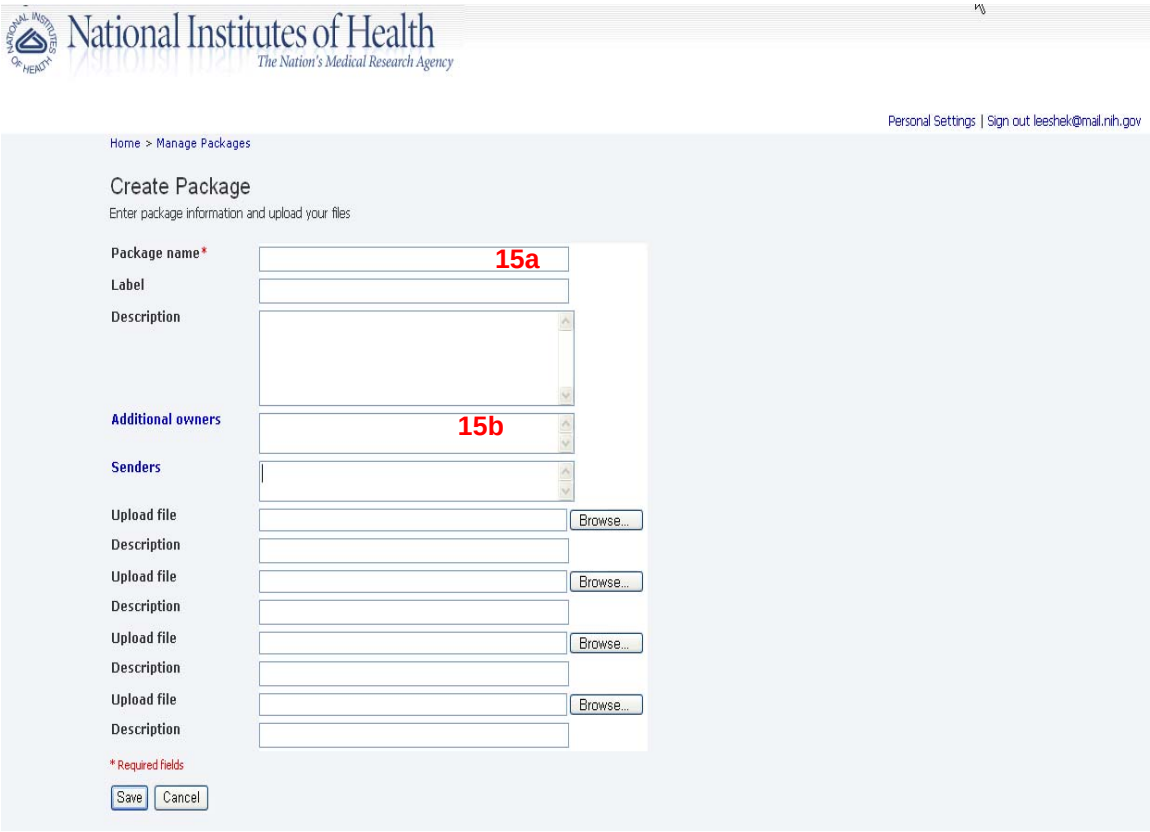


Fig. 12 – Create a Packages

Note: Unless added as "additional Owners," "Senders" will not have the ability to manipulate the package (i.e. change information/add-delete attachments/etc.) If you wish others to have the same level of package access as you, add them as an additional owner, as opposed to adding them as a sender.

Managing Packages

16. Manage a Package.

To manage an existing package you must click on the "Manage Packages" link from your SEFT home page (sec. 7b, fig. 4). This will bring you to the **Manage Packages** screen (sec. 14, fig. 11) where you will be able to select which package you wish to manage. Clicking on the appropriate package will bring you to the page for that package (fig. 13). Once here you can:

- **Edit** your package (see: sec. 17)
- **View** the package history (see: sec. 19)
- **Delete** the package altogether.
- If the package is complete, and ready to be delivered, you can click on the "**Deliver Package Now**" button (**16a**), and you will be taken to the package delivery page (sec. 20).

Clicking on the **Add** link (**16b**) within a package page allows you to add additional files (see: sec. 16).

This page also displays a list of Files attached to the package, as well as a list of deliveries/recipients for each package.

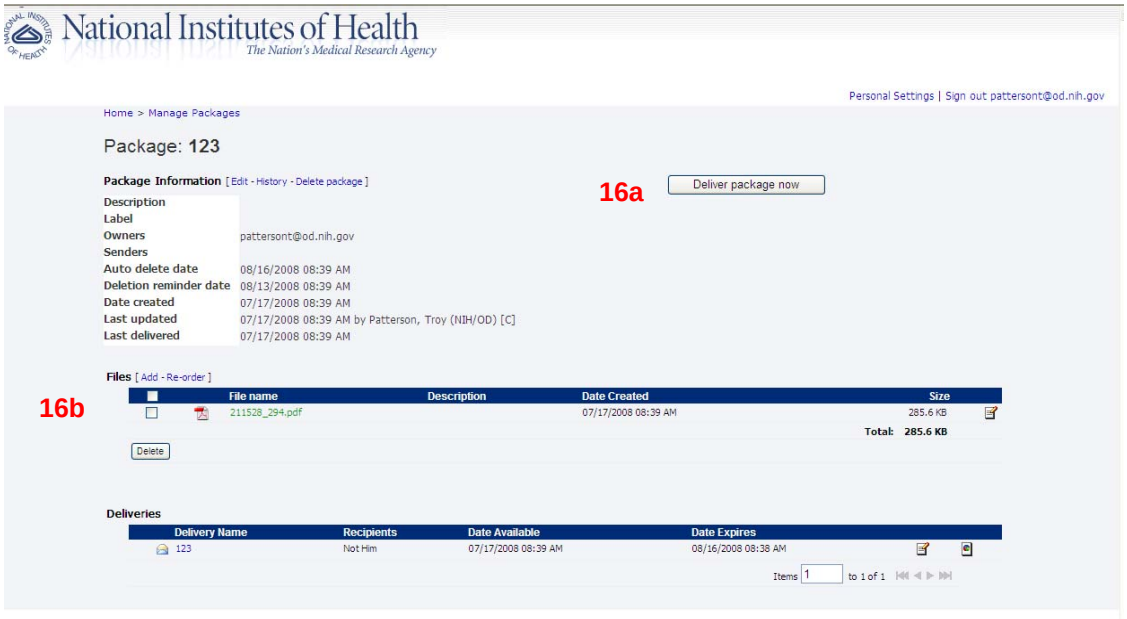


Fig. 13 – Manage a Package

Note: Clicking on the active link in the "**Files**" area also permits you to add additional attachments or move the order of attachments around to suit your needs.

Remember: "Delivering" a package simply sends out a notification email to your recipients with a link to where the package is securely stored. Your recipients must click the link and login to the SEFT application to access the secure package.

Managing Packages (continued)

17. Edit a Package.

The **Edit** function (fig. 14) for individual packages allows you to **Update Package Information** for the header information of a package as displayed in the **Create a Package** (fig. 12, above) area and has the same basic functionality. A packages name, label, description, owners, and senders can all be edited, for any given package.

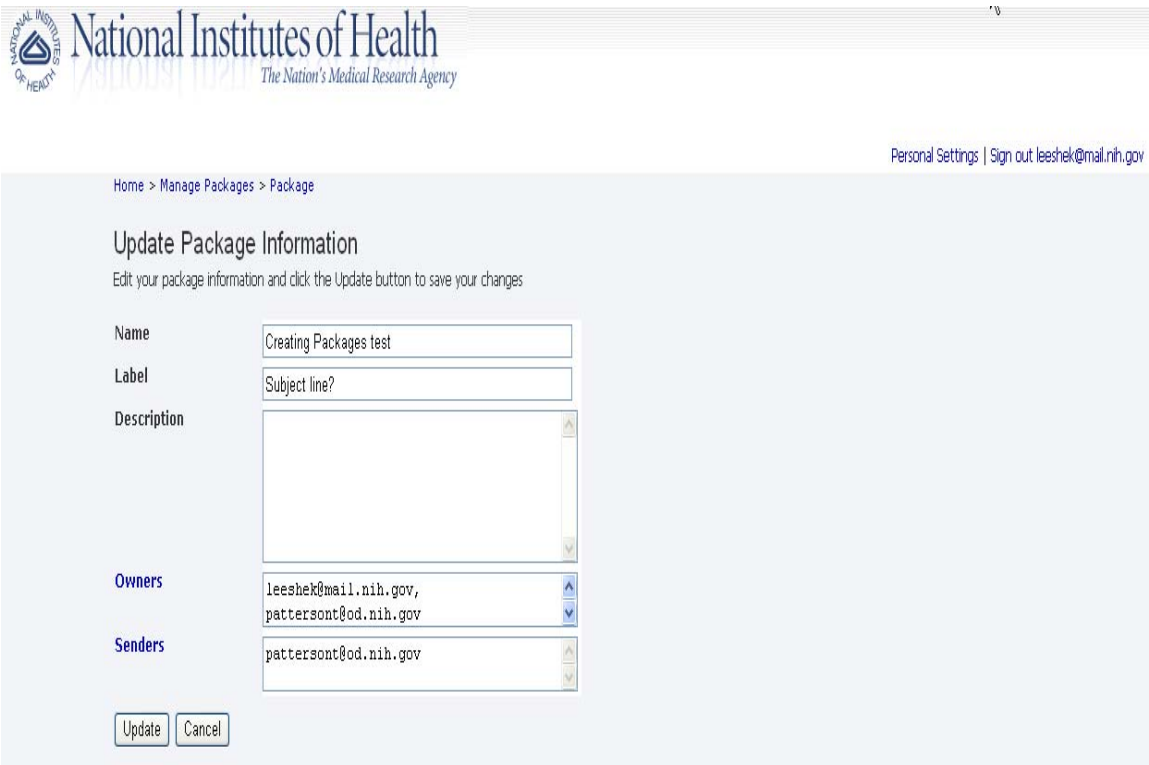


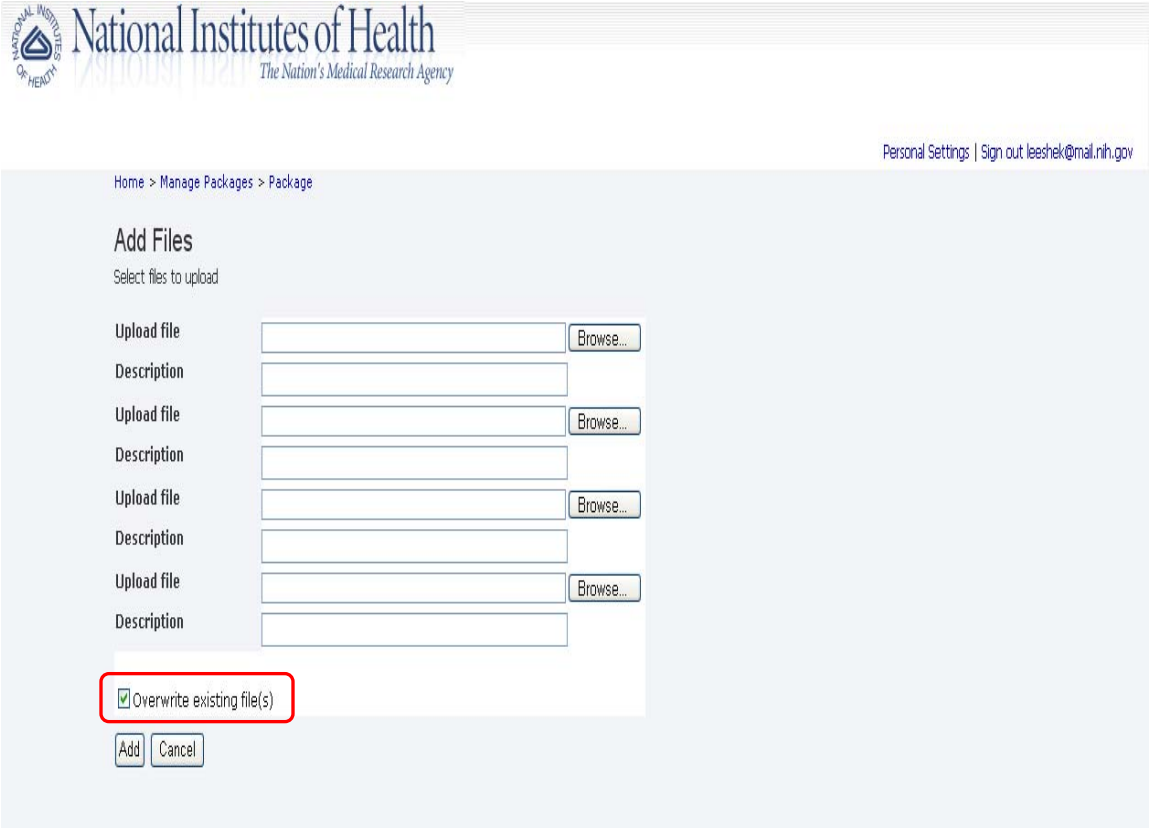
Fig. 14 – Edit a Package

Managing Packages (continued)

18. Adding Files.

Clicking on the **Add** link (sec. 16, fig. 13) within a package page allows you to include additional files; over and above the basic four permitted in the Create a Package page. As with adding from the Create page, clicking on the "Browse" button allows you to navigate to where the files are located.

Note: The "Overwrite Existing Files" checkbox will ONLY overwrite files that have the exact same name and file-extension as a file you have previously attached to your package. Un-checking this box permits files with the exact same name/extension to be attached to your package. It is recommended that this box remain checked, to avoid confusion with your intended recipients over which (name) file to open.



Managing Packages (continued)

19. Package History/Activity.

Clicking on the History link (sec. 16, fig. 13) on the package information line of a packages page will take you to the **Package Activity** page, which will display detailed information concerning the activity history of the package, with detail levels of: Critical | Major | Standard | Detail | Most Detail. Each level provides progressively more detail about activities related to your package(s) history. Click on each, when you visit the page, to see the various levels of detail afforded by each view.

Fig. 16 – Package History/Activity

Managing Packages (continued)

20. Delivering a Package

Once you have assembled your package, and are ready to share it with your intended recipients (sec. 16, fig. 13), simply navigate to the package from the **Manage Packages** page and click on the **Deliver Package Now** button (**16**).

This will take you to the **Delivering Package** page (fig. 17) which mimics the functionality of the Express Delivery (sec. 13, fig. 10a & b, above) page when adding emails addresses, including a secure message, notification message, availability dates, and additional password.

Note: The only difference between "Express" and a non-express delivery is that, once you decide to send the package by clicking on the **Deliver Package Now** button from the **Manage Packages** page, you will not have the ability to include any additional attachments from that point.

Once you have included your recipients email addresses (**20a**), composed your secure message (**20b**), your notification message (**20c**), set the availability dates and/or set an access password (**20d** & **e**), click the Send button at the bottom of the page (**20f**) to deliver your Secure Email or File.

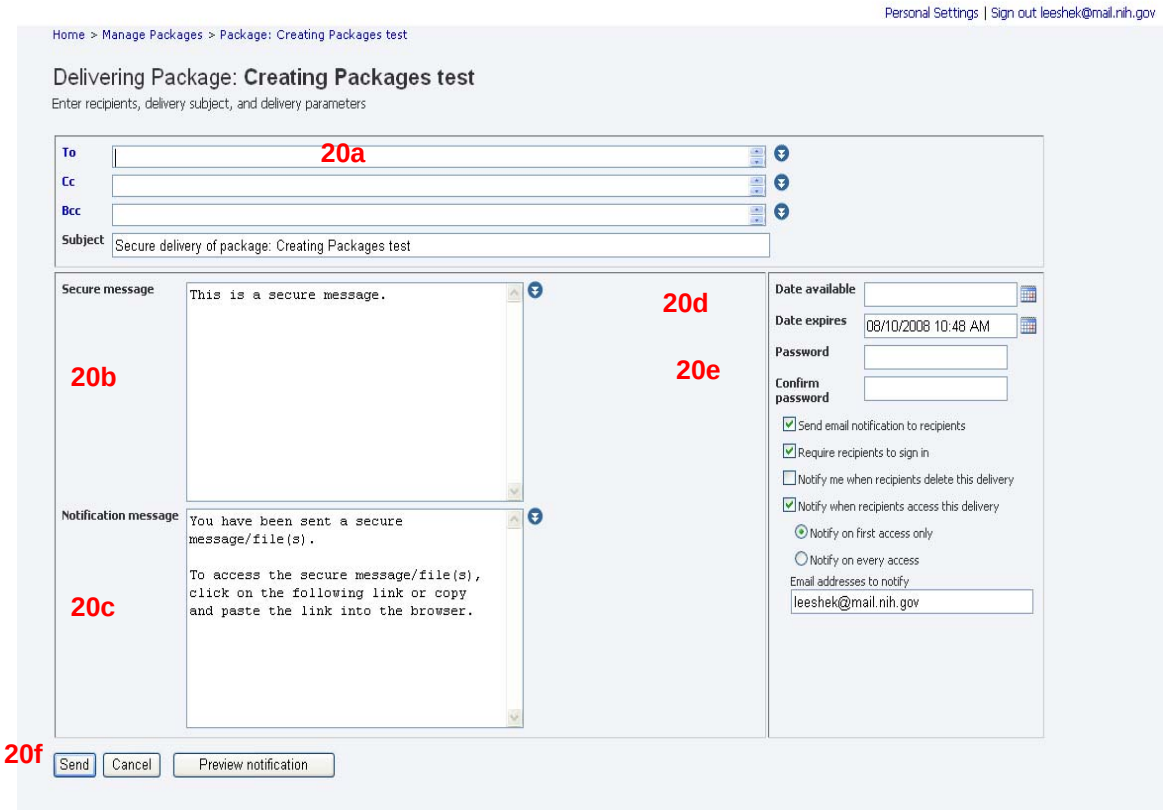


Fig. 17 – Delivering a Package

Notification/Delivery Message

21. Notification Message.
Once you have "sent" your package your recipient(s) will receive a Notification Message much like the one in Figure 18. Clicking the link within the message will take them to either the login or registration pages, as appropriate.

Secure delivery of package: Creating Packages test

Lee, Shekila (NIH/OD) [E]

To: Lee, Shekila (NIH/OD) [E]

```
You have been sent a secure message/file(s).

To access the secure message/file(s), click on the following link or copy and
paste the link into the browser.

Sender  :  Lee, Shekila (NIH/OD) [E]
Link    :  https://secureemail.nih.gov/bds/Login.do?id=A043974865&p1=953

Sent To :  Patterson, Troy (NIH/OD) [C]
Expires :  8/10/08 10:48:00 AM EDT


NIH SecureEmail Service, brought to you by the NIH Central Email Service.
*Proven*Trusted*
```

Fig. 18 – Notification Message

Notification/Delivery Message (continued)

22. Your Delivery.

Once registered and/or logged in the recipients will be taken to the **Your Delivery** page (fig. 18) where they will have access to any secure message you may have included in addition to any included attachment/files you added to your package

The delivery page displays all of the elements of the package you have created. The package' and recipients' name, the subject line and who the sender was can be seen in the header (**22a**).

The attendant messages (**22b** & **c**), as well as any attachments (**22d**) are displayed in the middle of the screen.

If you have send capabilities you will also see that there is the ability to compose a reply message (**22e**) and upload additional files (**22f**), prior to clicking the "**Reply**" (**22g**) button.

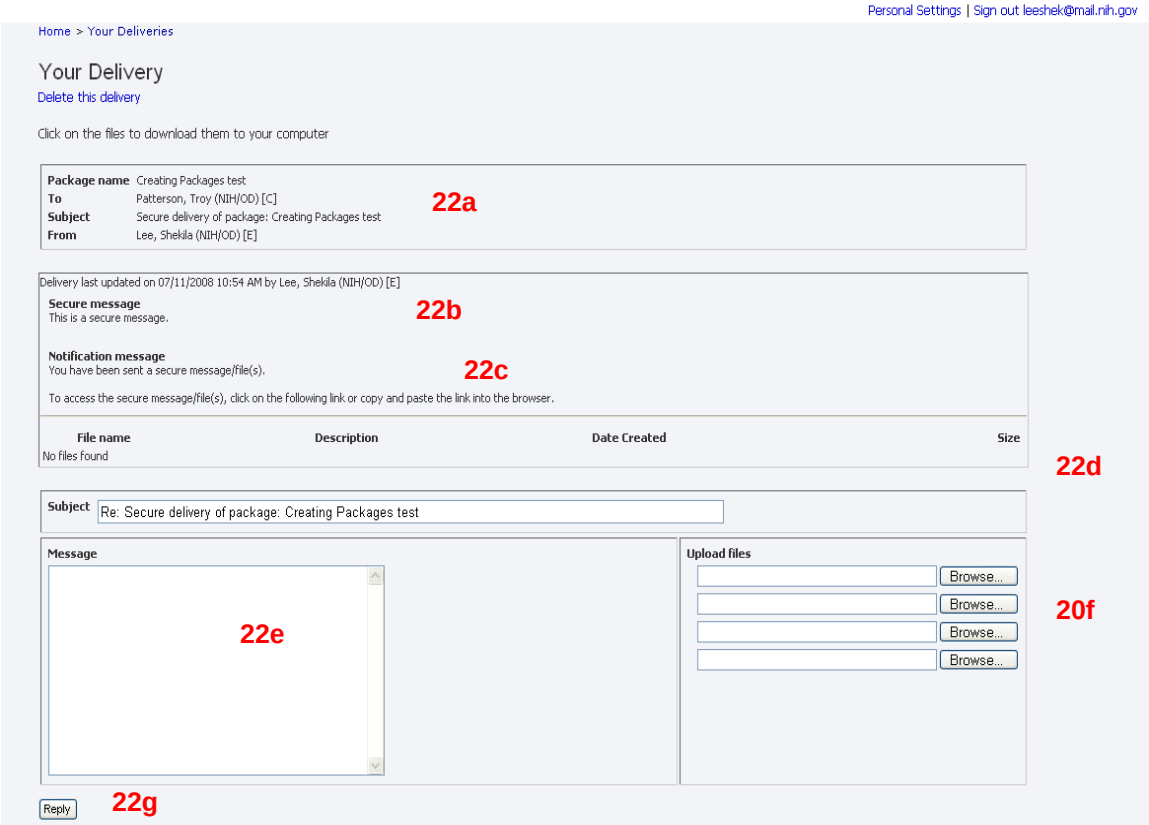


Fig. 19 – Your Delivery