



zixselect™
for Outlook 2003

Version 3.5

zixcorp.®

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ZixVPM Version 4.0

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Acknowledgements

The ZixVPM product uses software provided under license from dtSearch (www.dtsearch.com) to provide the content pattern matching functionality.

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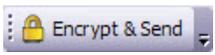
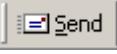
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Protecting Confidentiality with ZixSelect

If you work with personal information such as health, financial or other confidential information, you can protect its confidentiality and privacy by using an encrypted email service. The ZixSelect™ client that you install on the **New Mail Message** tool bar of Microsoft Outlook 2003 allows you to protect personal information. The feature allows you to send messages encrypted or unencrypted when used in conjunction with a ZixVPM® appliance. It is dependent upon policy configuration choices made by your system administrator.

Your system administrator sets policies related to the Health Insurance Portability and Accountability Act (HIPAA) and the Gramm-Leach-Bliley Act (GLBA) that encrypts email messages that contain personal health or personal finance information. As an added measure, you can use ZixSelect to ensure that specific messages are sent encrypted or unencrypted.

The ZixSelect client works with the ZixVPM appliances installed in your corporate network. This version of ZixSelect gives you two options when sending email messages, in addition to the standard **Microsoft Outlook Send** button:

Icon	Button Name	Description
	Encrypt & Send	To encrypt and send messages containing personal or confidential information.
	Send Unencrypted	To send unencrypted (plaintext) messages that contain personal or confidential information but do not violate corporate confidentiality rules regarding HIPAA or GLBA.
	Send	To send messages that do not contain personal or confidential information.

Note: If you have an older version of the ZixSelect buttons on your tool bar, installing the new ZixSelect Outlook Setup client replaces it with the newer version and buttons.

Installing ZixSelect for Outlook 2003

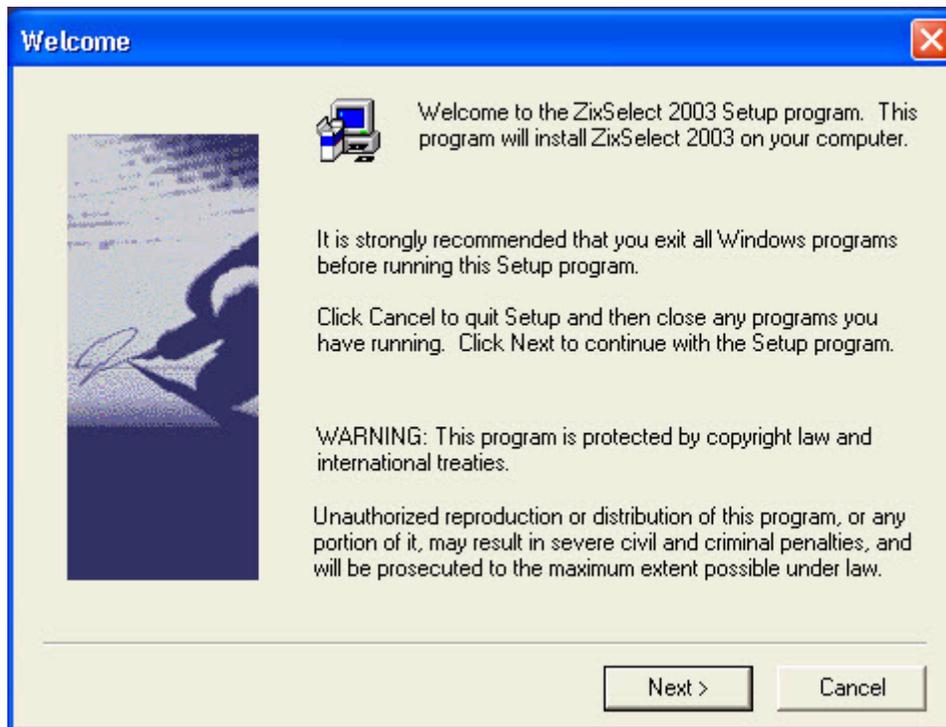
Before you begin, open a new email message in Microsoft Outlook to see if your system administrator has automatically installed the ZixSelect **Encrypt & Send** and **Send Unencrypted** buttons. If one or both of the ZixSelect padlock buttons are present on the **New Mail Message** tool bar, ZixSelect is already installed and you can skip this section.

Note: ZixSelect for Outlook 2003 is supported on Windows XP, Windows Vista and Windows 7.

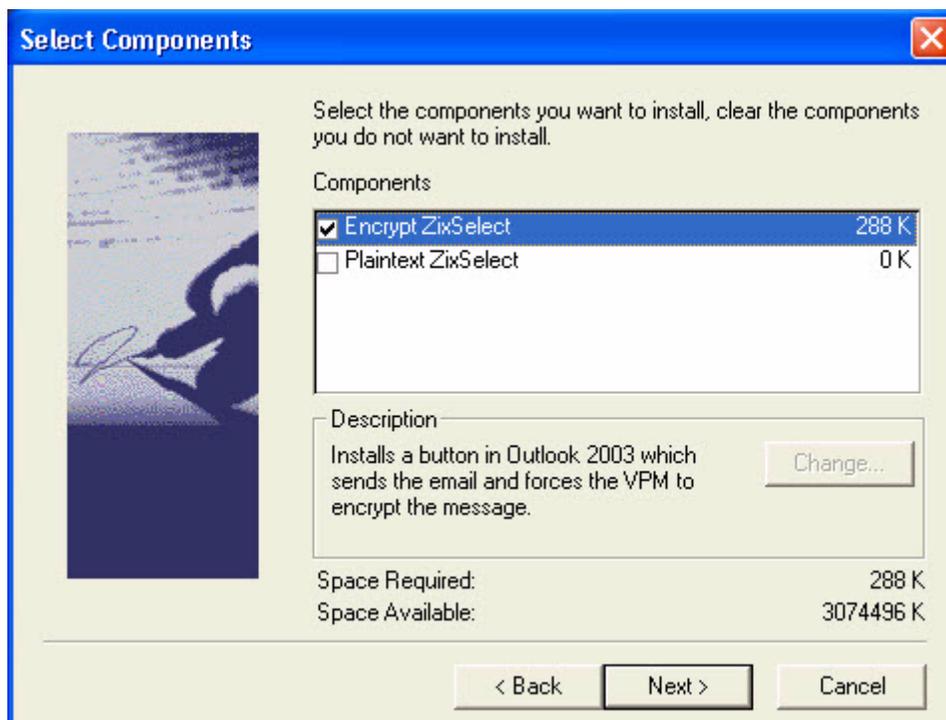
To install the tool bar buttons:

1. Close any Windows based applications.
2. Download the **ZixSelect for Outlook 2003** installer to a location that you can easily remember.
3. Browse to the location where you placed the file, and double-click **ZixSelect2003Setup_3.5.exe**

ZixSelect for Outlook opens and displays the Welcome page.



4. Click **Next**.
5. Accept the default destination folder by clicking **Next**.
6. On the **Select Components** screen, click **Next** to have only the ZixSelect **Encrypt & Send** button installed.



Note: Select the **Plaintext ZixSelect** check box if you want to install both the ZixSelect **Encrypt & Send** and ZixSelect **Send Unencrypted** buttons. Check with your system administrator if you are unsure.

7. On the **Setup Complete** screen, click **Finish** to close the ZixSelect installer.

You can now open Microsoft Outlook and begin using the ZixSelect **Encrypt & Send** and ZixSelect **Send Unencrypted** buttons.

Silently Installing ZixSelect for Outlook 2003

The following instructions outline how ZixSelect for Outlook 2003 can be installed silently using InstallShield. The InstallShield silent installation requires a response file that will be used to automate user responses. This file can be generated as follows:

1. In a DOS command shell, go to the directory containing the installation package.
2. Run the following command and perform the desired installation:

```
ZixSelect2003Setup_3.5.exe -a -r
```

Explanation of flags:

- **-a** Instructs the self-extraction process to pass the remaining arguments to setup.exe. Note that the first step of the installation is performed by a self-extracting executable that extracts setup.exe before running it.
- **-r** Record the user input.

The resulting response file can be found in **C:\Windows** and is called **setup.iss**.

The setup.iss file can be moved to any directory. The silent installation can now be performed. The following sample command assumes that the self-extracting executable and response file are in the same directory.

1. In a DOS command shell, enter the following single command:

```
C:\zixselect\ZixSelect2003Setup_3.5.exe -s -a -s -f1C:\zixselect\setup.iss
```

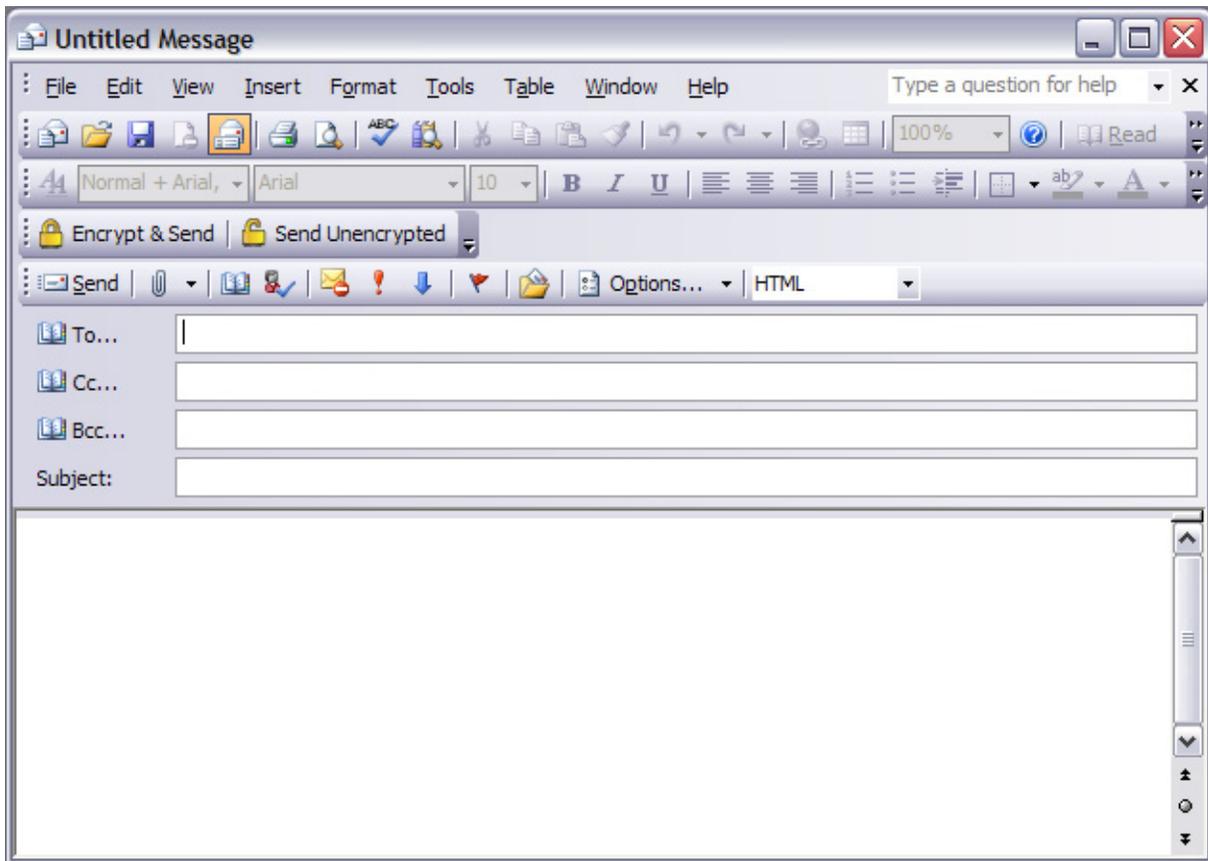
Explanation of flags:

- **-s** Instructs the self-extracting executable to run silently.
- **-a** Pass the remaining arguments on to setup.exe.
- **-s** Instructs setup.exe to run silently.
- **-f1** Tells InstallShield where it can find the response file.

A log file (**setup.log**) will be created in the same directory as the setup.iss file.

Using the Encrypt & Send Button

When you open a new email message in Microsoft Outlook 2003, you will see the **Encrypt & Send** and **Send Unencrypted** button on your tool bar.



Note: If you are a ZixMail user, the ZixMail for Outlook 2003 button may also be on your Microsoft Outlook tool bar.

The ZixVPM encryption policies are based on lists of health or finance-related terms, personal identifiers, family-relationship identifiers, and Boolean logic (AND, NOT, OR) combinations. ZixSelect offers supplementary controls to the encryption policies defined at the corporate level for your ZixVPM.

- When you want to send a message containing personal information as defined by HIPAA or GLBA, use the ZixSelect **Encrypt & Send** button.
- For messages that do not contain personal information, use the standard Microsoft Outlook **Send** button.
- If your message contains health- or financial-related language, but does not violate HIPAA or GLBA, use the ZixSelect Send Unencrypted button.

Using the Send Unencrypted Button

The ZixSelect Send Unencrypted button is optional and is installed depending on your corporate policies. It can be particularly useful for email users in the health care or financial industries. Messages may contain terms that need to be protected according to HIPAA or GLBA, but you may be sending them to a general audience or in a way that does not violate anyone's confidentiality.

Examples include:

- Marketing and sales information
- Educational information
- Mailing list discussions

Using ZixSelect from Microsoft Word 2003

To send an email message and/or document using ZixSelect from Microsoft Word 2003:

1. Open Microsoft Word, and:
 - Click the **E-mail** button on the **Standard** tool bar
 - Select **File > Send To > Mail Recipient**
 - Select **File > Send To > Mail Recipient (For Review)**
 - Select **File > Send To > Mail Recipient (As Attachment)**
2. Enter at least one recipient and any other information, such as a subject or body text for the email message.
3. Click the **Encrypt & Send** or **Send Unencrypted** button displayed on the Microsoft Office tool bar.