Encrypt. Manage Documents. Collaborate.
CipherShare Secure Document Management

CipherShare

User's Quick Reference Guide

Proven Security Solutions Incorporated

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Introduction

The CipherShare QuickReference is designed to provide a brief overview of each feature offered by CipherShare. More complete descriptions of these functions and their use can be found in the "CipherShare User's Guide" available through the Proven Security Solutions Incorporated web site at:

http://www.provensecuritysolutions.com/CipherShare/OnlineDocuments/UsersGuide3.0.htm

CipherShare was designed from the ground up to offer secured, "end-to-end" encrypted collaborative services including optimized file sharing, secure chat, secure messaging, full versioning, auto-notification, notes tasks, etc. The application is quite simple to use, once the following key concepts have been learned:

1) **Logging in**: CipherShare requires a user to have a valid account within a workspace to log in to the application. As well, the user must know the following information:

   a. Username
   b. Passphrase
   c. Office Name (workspace)

   If any of these elements are incorrect, CipherShare will not allow you to login.

2) **Trust**: CipherShare uses and displays three levels of trust within a workspace:

   a. "**Untrusted**" users are those users within the workspace whose identity has not yet been verified by you or a security officer.
   b. "**Trusted**" users are those users whose identify has been verified by you.
   c. "**Indirectly Trusted**" users are those users whose identity has been verified by another trusted user – either a local or global security officer.

   Verifying a user's identity is done through a process called "Key Signing" which is explained in detail in the CipherShare User's Guide.

3) **Editing and Check-in / Check-out**: When a user wants to edit a document, he/she must "check-out" the document. Once checked out, no other user can modify the document until it is checked back in. Checking a document back in uploads the changes to the CipherShare server, so that other members with whom the document has been shared can see the new version.

4) **Versioning**: All changes to documents or files are kept by CipherShare in a version history. This history shows how the document has evolved and can be accessed by anyone with whom the document is shared.

5) **Sharing**: Documents can be shared with all, or only some, members of a workspace. If a person is not on the share list for a specific document or file, he/she will not see it, or know that it exists.

6) **Roles**: For each document or file, a user can have one of three roles:

   a. **M**anager: Managers can delete, move, modify and change the share lists of documents or files
   b. Author: Authors can modify a document or file
   c. Reader: Readers can view a document of file

7) **Synchronization**: When a document or file is shared with a user, that user must synchronize (download) the document or file before being able to view, edit, or access it off-line. Synchronization can be on a per document or file basis, or be applied to all unsynchronized documents or files.

"System" Menu

Item	Description
Connect	Enables the user to login to CipherShare and connect to a CipherShare server. (Disabled when CipherShare is already connected to a server)
Disconnect	Logs a user out of CipherShare and disconnects the client from a CipherShare server. (Disabled when CipherShare is already unconnected to a server)
Lockout (Inactivity Lockout)	"Locks" the CipherShare client so that the application cannot be used and no data is visible. Requires the user to login to begin using the CipherShare application. When invoked, lockout shows the user as "Away" to other CipherShare users.
Back	Returns the user to the previous application view.(Disabled if first view)
Forward	Brings the user to the next application view (user must already have seen this view).(Disabled if last view)
Change my Status	Allows a user to set their on-line visible status (e.g. "On-line", "Busy", etc.). This status is shown to all other CipherShare users within the workspace through CipherShare's presence management functions.
Edit my Details	Allows a user to self-manage and change personal details within their user profile.
Change Password	Allows a user to change their password and regenerate their public and private keys.
Manage Keys	Allows a user to create new public signing, public encryption and secret keys. This should be done occasionally as part of a comprehensive security policy.
Key Signing	Allows a user to formally sign (verify) the authenticity of a specific user's key within CipherShare. Key signing or verification is usually done "out of band". Once a key is signed, the user owning that key shows as "Trusted" within the trust list.
Key Recovery	**Documents menu item containing the following sub-menus -** Allows a user to coordinate a key or account recovery session (Root or Local Security Officers only) or to participate in an account recovery session (potentially any user)
Enroll in Password Reset	Allows the user to enroll in password reset so that a password can be reset if forgotten or lost
Coordinate Password Reset	Allows a Root or Local Security Officer to coordinate and achieve a password reset by working directly with a user.
Enroll in Account Recovery	Allows the user to enroll in account recovery so that an account can be recovered if required by accident/death or other causes.
Participate in Account Recovery	Allows a user who has been designated as a Key Recovery Agent for another user to participate in an Account Recovery process.
Coordinate Password Reset	Allows a Root or Local Security Officer to coordinate and achieve account recovery by working directly with user designated as Key Recovery Agents for the account.
User Manager	Allows a security officer (Root or Local) to add and edit users, disable or re-enable CipherShare accounts, add and edit user group sections
Share Groups	Allows a security officer (Root or Local) to add, edit and remove share groups (a share group streamlines document sharing by creating a collection users under one name)
View Security Policy	Allows a user to review the existing security policy for the office currently logged in to
Edit Security Policy	Allows a Root Security Officer only to change the security policy settings for the office currently logged into
Options	Allows the user to specify their usage preferences with respect to CipherShare including documents, notifications, messages, chats, security (e.g. length of inactivity timeout), extensions and so on.
Exit	Closes the CipherShare application.

"Documents" Menu

Item	Description
New	Allows the user to create a new document folder or a new file within CipherShare (files and documents can also be "dragged" into CipherShare).
Import	Allows the user to import (bring into) files and documents into CipherShare's secured collaboration environment. Documents and files that are imported can optionally be securely deleted from the source directory.
Import Directory	Allows the user to import an entire directory (and optionally all sub-directories) into CipherShare's secured collaboration environment. Documents and files that are imported can optionally be securely deleted from the source directory.
Document	**Documents menu item containing the following sub-menus**
Move	Allows the user to move a file to another existing – or new - folder location. Mangers only.
Copy	Allows the user to copy an existing CipherShare file, creating a new CipherShare file,
Delete	Allows the user to delete a selected document or file. Once deleted, the document or file will appear in the "Deleted Documents" area and can be fully deleted from the system. Managers only.
Properties	Displays, and allows editing of, the properties of the selected document or file (e.g. name, folder, etc.). Properties can be viewed by everyone on the share list but can only be changed by document/file managers.
Sharing	Displays, and allows editing of, the share list of the selected folder or document/file. Share lists can be viewed by everyone on the share list but can only be changed by document / file managers.
Versions	Displays the full version history for the selected document/file. Version lists can be viewed by everyone on the share list but only Authors or Managers of document/files can view a previous version. As well, only Managers can "roll-back" a document/file to a previous version (all subsequent versions are lost).
Audit	Displays the full audit history for the selected document/file. The audit history displays the list of actions taken against a document, the identify of the user taking the action and the digital signature applied to the action. Any user's digital signature can be viewed and verified through the Audit function.
Notes	Allows the user to create - or reply to - a "Note" associated with the selected document/file. A Note is a fully threaded discussion forum attached to the document or file through which all authors and managers within the share list for the selected document can communicate.
Tasks	Allows the user to create – or mark as completed - "Tasks" associated with the selected document/file. A task is a description of an action with a due date assigned to specific members of the share list for the selected document/file. Users can view their assigned tasks through the "Incomplete Tasks" document filter.
Flag	Allows the user to create – or clear – flags associated with the selected document or file. A flag is a visual identifier coupled with a description. Once created, flagged documents can be viewed by a user through the "Flagged Documents" filter.
Mark as Read	Allows the user to mark as read (unbold) selected documents that have been modified and not viewed. By default, all modified documents that have not been viewed appear as unread (bolded) within document lists. This action also removes the document from the "Unread Documents" filter list.
Mark all as Read	Allows the user to mark as read (unbold) all selected documents that have been modified and not viewed. By default, all modified documents that have not been viewed appear as unread (bolded) within document lists. This action also removes the document from the "Unread Documents" filter list.

Item	Description
Working	Documents menu item containing the following sub-menus
Edit	Allows the user to download (if necessary) and edit a document or file. While a file is being edited by a user, it is "locked" or "checked-out" by that user and cannot be edited by any other user within the workspace.
Edit With	Functions the same as Edit, but allows the user to select the application used to view and edit the file.
View	Allows the user to download (if necessary) and view a document or file as "Read Only". Viewed files are not "locked" and cannot be edited by the user.
View With	Functions the same as View, but allows the user to select the application used to view the file.
Work with Latest Version	Allows the user to download the latest version of a file or document to his/her computer. Once downloaded, the content is synchronized and can be accessed off-line.
Remove Local Copy	Removes the local copy (desynchronize) of the file from the user's computer, leaving a copy only on the CipherShare server. Any desynchronized document must be resynchronized prior to being viewed or edited, or for off-line access.
Download	Allows the user to download (synchronize) the selected file from the server to the user's local CipherShare cache. Documents / files can only be edited and viewed after synchronization. Synchronized files are also available for off-line editing.
Download All	Allows the user to synchronize (download) all selected documents from the server to the user's local CipherShare cache. Documents / files can only be edited and viewed after synchronization. Synchronized files are also available for off-line editing.
Detect New Work Files	Displays a list of files that have been created within CipherShare's local work folder that are not currently within CipherShare's file list. These files can then be imported into CipherShare if desired.
Clear Work Files	Clears work files from CipherShare's local work folder for selected files. Only files that have been checked back into CipherShare will be cleared. Files that are checked-out remain in the work file folders. This is an important security feature since it allows a user to "zeroize" all temporary application files while working with CipherShare. Once cleared, work files cannot be compromised by malicious attackers on the network.
Clear All Work Files	Clears all work files within CipherShare's work folder for all checked-in documents and files.

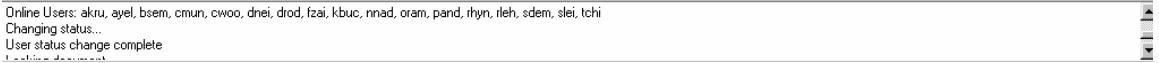| Item	Description
Locks	Documents menu item containing the following sub-menus
Check-Out	Allows the user to check-out ("lock") a document / file. When checked-out, a document cannot be edited by another author or manager on the document share list until the document is "checked-in". (Document "Manager", "Author" only)
Check-In	Allows the user to check-in ("unlock") a document/file. When a document is checked-in, it becomes available for editing by any author or manager on the share list. (Document "Manager", "Author" only)
Check-in All	Allows the user to check-in all checked-out documents and files. All documents/files must be closed in their native applications before check-in all can be successfully completed. (Document "Manager", "Author" only)
Undo Check-Out	Allows the user who has checked out a document/file to return the document to an "unlocked" state. Documents can only be unlocked when the document is closed within the application used to view or edit it. (Document "Manager", "Author" only)
Undo Check-Out All	Allows the user to undo checked-out documents and files. All documents/files must be closed in their native applications before check-in all can be successfully completed. (Document "Manager", "Author" only)
Override Check-Out	Allows the user to undo a check-out (unlock) a document which has been checked-out by another manager or author on the share list for that document. This function should only be used when absolutely necessary since it may prevent the user who initially locked the document from being able to add his / her modifications. (Document "Manager", "Author" only)
Lock Information	Shows the user details about who locked a document and when the lock was started.
Tools	**Documents menu item containing the following sub-menus**
Search	Allows the user to search for documents within CipherShare using a range of search criteria.
Jump to Folder	Allows the user to "jump" to the folder containing a document from a filtered view (e.g. from "Recent Documents" to the actual folder containing the document)
Compare Changes	Allows the user to select two versions of a file and compare the differences between them (Word format only).
Send Email Notification	Allows the user to send a message concerning a selected document through email to another member of the share list for that document. The message default alerts the user to the name of the file and its location, but the message can also be customized.
Restore Deleted Document	Allows the user to restore (undelete) a selected document within the "Deleted Documents" area. Restored documents are returned to their original location.
Empty Deleted Filter	Allows the user to empty the "Deleted Documents" area from any point in the application.
Export	**Documents menu item containing the following sub-menus**
Export	Allows the user to "export" a document or file from CipherShare to the user's local computer. Note that exported files are decrypted and placed within the user's Windows file system, and are therefore unsecured.
Archive	Allows the user to create a self-extracting, compressed and encrypted repository for all selected documents or files within the user's standard Windows file system. Each archive requires the creation of a pass phrase to enable decryption when viewed. This functionality is similar to WinZip with the additional benefits of strong encryption.
Email	Allows the user to send an unencrypted version of a selected file through his/her email client.
Export to Office	Allows the user to move a document or file in an encrypted state from one CipherShare workspace to another. Note that this command is only functional if more than one workspace has been logged into at the same time.
Export All to Office	Allows the user to move all selected files in an encrypted state from one CipherShare workspace to another. Note that this command is only functional if more than one workspace has been logged into at the same time.
Select All	Allows the user to select all displayed documents/files.

"Messages" Menu

Item	Description
View	Allows the user to view a selected message.
New	Allows the user to create a new message.
Reply	Allows the user to reply to the author of a message.
Reply All	Allows the user to reply to all recipients of a message.
Forward	Allows the user to forward the message to another user.
Print	Allows the user to print the message from NotePad or another text editor.
Search	Allows the user to search for messages based on a range of criteria.
Delete	Allows the user to send a message to the "Deleted Messages" folder.
Empty Deleted Folder	Allows the user to permanently delete all messages within the "Deleted Messages" folder.
Restore Deleted Item	Allows the user to reinstate a message from within the "Deleted Messages" folder.
Mark as Read	Allows the user to mark as read (unbold) selected messages that have not yet been viewed. By default, all modified messages that have not been viewed appear as unread (bolded) within message lists.
Mark all as Read	Allows the user to mark as read (unbold) all selected messages that have been modified and not viewed. By default, all modified messages that have not been viewed appear as unread (bolded) within message lists.
Audit	Displays the full audit history for the selected message. The audit history displays the list of actions taken against a message, the identify of the user taking the action and the digital signature applied to the action. Any user's digital signature can be viewed and verified through the Audit function.
Flag	Allows the user to create – or clear – flags associated with the selected message. A flag is a visual identifier coupled with a description. Once created, flagged documents can be viewed by a user through the "Flagged Messages" filter.
Send Email Notification	Allows the user to send an email concerning a selected message to a another member of the share list for that document. The message default alerts the user to the name of the message and its subject, but the message can also be customized.
Archive	Allows the user to create a self-extracting, compressed and encrypted repository for all selected messages within the user's standard Windows file system. Each archive requires the creation of a pass phrase to enable decryption when viewed. This functionality is similar to WinZip with the additional benefits of strong encryption.
Synchronize	Allows the user to synchronize (download) the selected message from the server to the user's local CipherShare cache. Messages / messages can only be viewed after synchronization.
Select All	Allows the user to select all displayed messages.

"Chat" Menu

Item	Description
New	Allows the user to initiate a new chat session with other members within the workspace. If the user has already selected members of the worksafe within the "Users" directory, the chat session will already have them included as participants. New participants can still be added.

"View" Menu

Item	Description
	Allows the user to toggle on or toggle off the display of the following interface elements:
Toolbar	Located at the top of the CipherShare screen, the tool bar is a collection of buttons that provide one click access to specific functions such as connect, disconnect, import and check-in / check-out.
Status Bar	Located at the bottom of the CipherShare screen, the status bar provides information on the status of the current event, upload and download volumes and the current connections status.
Status Window	The status window is located immediately above the status bar and provides a list of CipherShare events that have happened during the current session.

"Help" Menu

Item	Description
Help Topics	Starts the CipherShare on-line help system.
User's Guide	Opens a browser with a pointer to the publicly available user guide.
Error Log	Opens and displays the error log kept by the local CipherShare client. This helps Kasten Chase resolve bugs if reported.
About CipherShare	Displays version and copyright information concerning the installed version of CipherShare.