






ZixSelect for Microsoft Outlook


1.0 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 toolbar of Microsoft Outlook enables you to protect personal information. The feature empowers you to send messages encrypted or plaintext (unencrypted) when used in conjunction with a ZixVPM® server. 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 will encrypt messages that contain personal health or personal finance information. As an added measure, you can use the ZixSelect features to ensure that specific messages are sent encrypted or plaintext.

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

- **Encrypt ZixSelect** 
To encrypt and send messages containing personal or confidential information
- **Plaintext ZixSelect** 
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.

If you have the blue ZixSelect icon on your toolbar, , installing the new ZixSelect Outlook Setup client replaces it with the open and closed red padlock buttons.

1.1 Installing ZixSelect

Before you begin, open a New Mail Message in Outlook to see if your System Administrator has automatically installed the red Encrypt ZixSelect and Plaintext ZixSelect buttons on your desktop. If the red open and closed padlock buttons are present on the New Mail Message toolbar, ZixSelect is already installed and you may skip this section.

To install the toolbar buttons, follow the steps below.

1. Exit all Microsoft Windows programs, including Outlook.

2. Download the appropriate ZixSelect for Outlook client to your desktop.

The file for Outlook 2000 or Outlook 2002 is named:

ZixSelectOutlookSetup_English_2_2_1503.exe

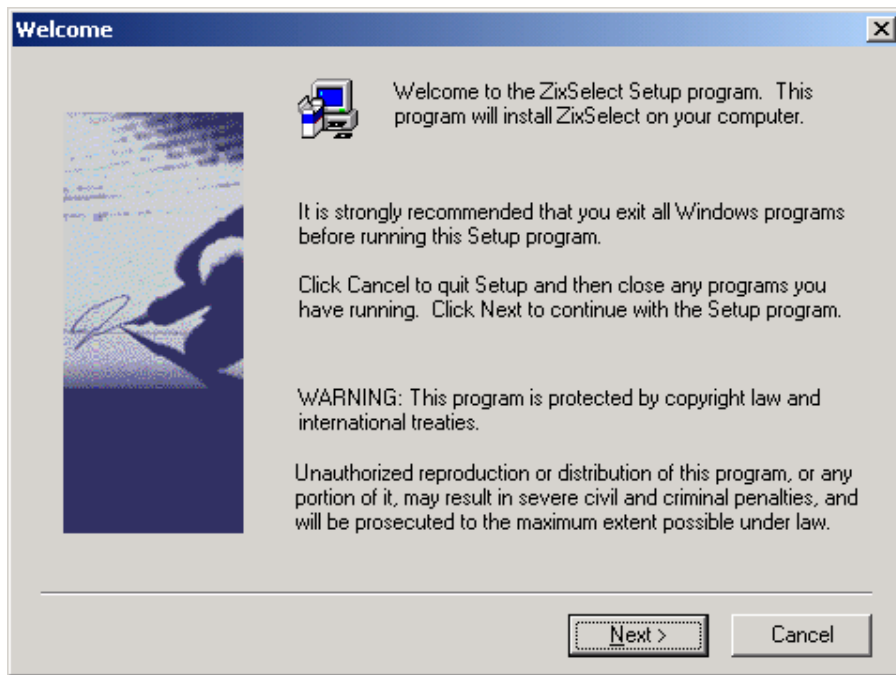
The file for Outlook 2003 is named:

ZixSelect2003Setup_English_3_1_1822.exe

Your System Administrator will email you this file or provide you with the appropriate location to download it from.

3. Double-click the filename.
4. ZixSelect for Outlook opens and displays the Welcome page.
5. Click **Next**.

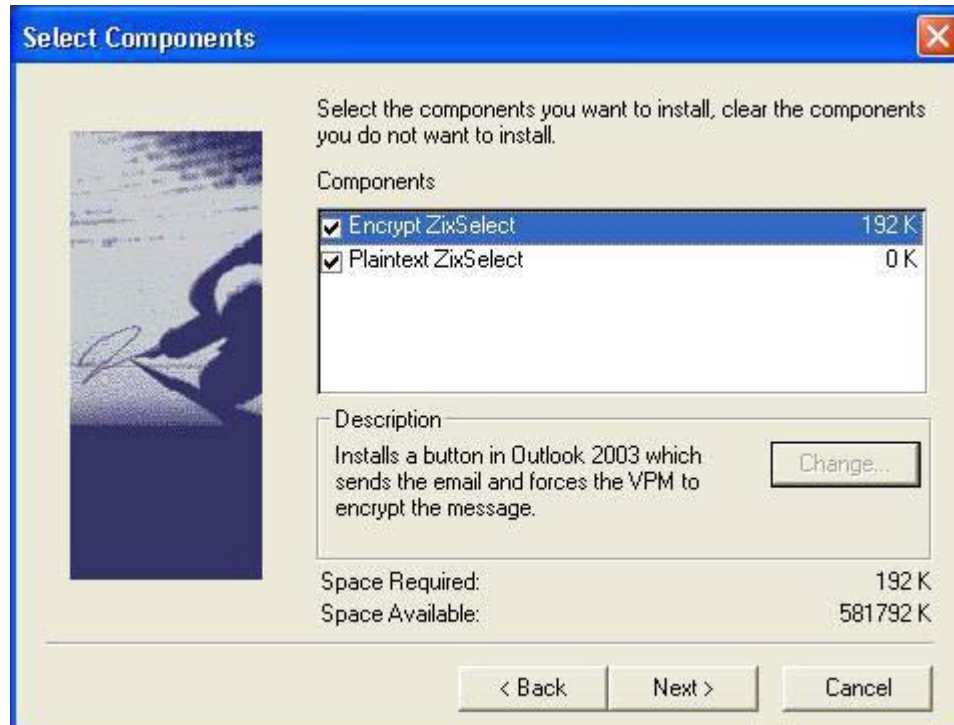
ZixSelect Setup Program



6. Accept the default destination folder by clicking **Next**.

7. On the Select Components screen, click **Next** to accept the default for both components.

NOTE: Click the check box for Zix Force Plaintext if you will be using this option. Check with your System Administrator if you are unsure.



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

You may now open Microsoft Outlook and use the Encrypt ZixSelect and Plaintext ZixSelect buttons.

Notes on using ZixSelect for Outlook 2003:



- ZixSelect for Microsoft Outlook 2003 is supported on Windows 2000 and Windows XP.
- Using Microsoft Word as the editor is supported.
- If you are using Outlook and Word simultaneously, you must open Outlook first. If not, the ZixSelect buttons will not display.

Notes on using ZixSelect for Outlook 2000:

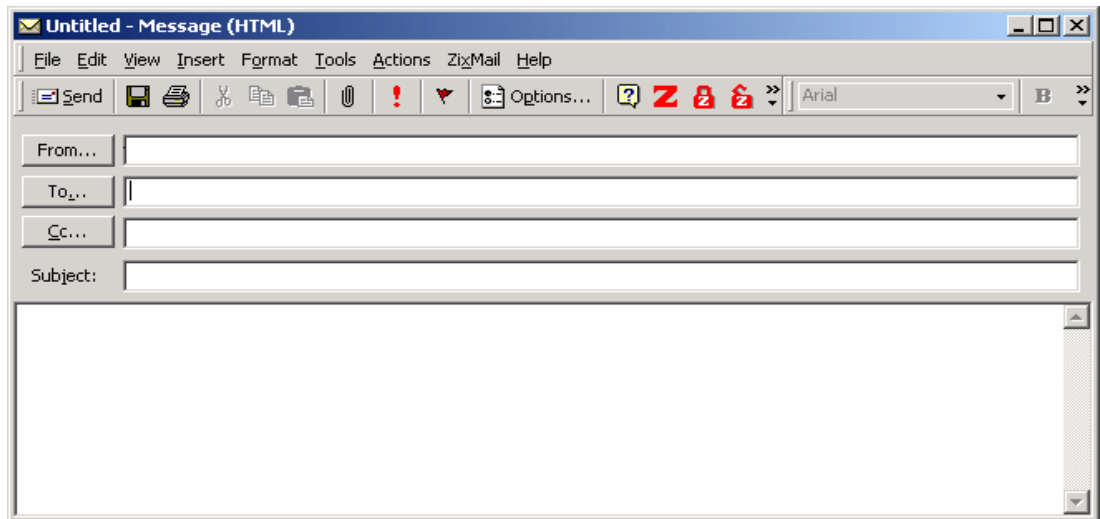
- ZixSelect for Microsoft Outlook 2000 is supported on Windows 2000 and Windows XP.

- ZixSelect for MS Outlook 2000 works with Outlook 2000 or Outlook 2002.
- Using Microsoft Word as the editor is not supported. The ZixSelect buttons will either not appear or will not display properly.

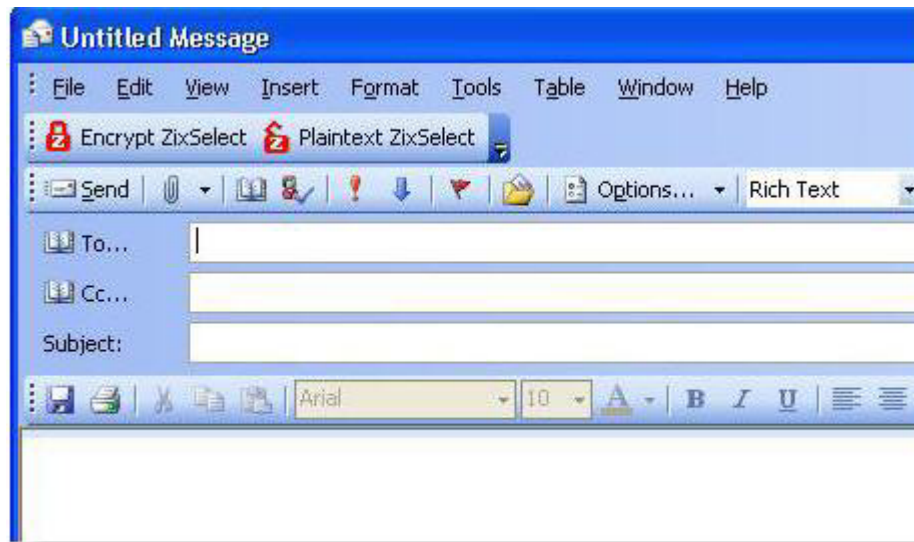
1.2 Using the Encrypt ZixSelect Button

When you open a New Mail Message in Microsoft Outlook, you will see the Encrypt ZixSelect button, , and the Plaintext ZixSelect button, , on your toolbar.

New Mail Message in Outlook 2000/2002



New Mail Message in Outlook 2003



Note: If you are a ZixMail user, the ZixMail buttons will also be on your Outlook toolbar.

ZixMail for MS Outlook 2000/2002



ZixMail for MS Outlook 2003




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 Encrypt ZixSelect button.
- For messages that do not contain personal information, use the standard Outlook Send button.
- If your message contains health- or financial-related language but does not violate HIPAA or GLBA, use the Plaintext ZixSelect button.

If you send a message containing personal information without encrypting it, the ZixVPM at the corporate level tests it against its defined encryption policies, the HIPAA and GLBA lexicons, and returns it to you with a notice that it contains information that must be encrypted.

1.3 Using the Plaintext ZixSelect Button

Plaintext ZixSelect, , is optional and is installed depending on your corporate policies. It can be particularly useful for email users in the healthcare 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

Summary

Protect the privacy of health and financial information in your email by using Encrypt ZixSelect to encrypt email messages, otherwise, use the Send button. Use Plaintext ZixSelect when your email contains financial or health-related terms, but does not violate HIPAA or GLBA.

The ZixVPM policies will protect you from sending personal information unencrypted by flagging a plaintext message containing it and returning it to you. You may then:

- Encrypt it with Zix Force Encryption, 
- Remove the personal information and resend it, 
- Verify the personal information does not violate HIPAA or GLBA, and send it with Plaintext ZixSelect, .