Important Information

**Latest Software**
We recommend that you install the most recent software release to stay up-to-date with the latest functional improvements, stability fixes, security enhancements and protection against new and evolving attacks.

**Latest Documentation**
The latest version of this document is at: [http://supportcontent.checkpoint.com/documentation_download?ID=36190](http://supportcontent.checkpoint.com/documentation_download?ID=36190)

To learn more, visit the Check Point Support Center ([http://supportcenter.checkpoint.com](http://supportcenter.checkpoint.com)).

For more about this release, see the E80.60 home page ([http://supportcontent.checkpoint.com/solutions?id=sk102651](http://supportcontent.checkpoint.com/solutions?id=sk102651)).

**Revision History**

<table>
<thead>
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<th>Date</th>
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<tr>
<td>05 November 2014</td>
<td>Improved formatting and document layout</td>
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<tr>
<td>28 October 2014</td>
<td>First release of this document</td>
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**Feedback**
Check Point is engaged in a continuous effort to improve its documentation.
Please help us by sending your comments ([mailto:cp_techpub_feedback@checkpoint.com?subject=Feedback on Capsule Docs Plugin E80.60 User Guide](mailto:cp_techpub_feedback@checkpoint.com?subject=Feedback on Capsule Docs Plugin E80.60 User Guide)).
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Chapter 1

Introduction to Capsule Docs Plugin

The Capsule Docs Plugin lets you create and edit protected documents using the Capsule Docs supported Windows applications. It can be installed on your computer on its own or as part of the Endpoint Security client.

Based on the permissions that your administrator gives you, you can:

- Assign classifications to documents
- Decide who can view a document

This document describes how to use the plugin.

Installing the Plugin

To install the Capsule Docs plugin, you must be logged into your computer as an administrator, and no other Capsule Docs users can be logged in during the installation. The Capsule Docs plugin is available for Windows.

To download and install the Capsule Docs plugin:
1. In a web browser, go to the Capsule Docs website (https://ds.checkpoint.com/ds-portal/desktop).
2. In the Also available on section, click Windows Editor.
   The CPDS.exe file downloads to your computer.
3. Double-click CPDS.exe to start the installation.
4. Follow the steps of the installation wizard.

Uninstalling the Plugin

If necessary, uninstall your Capsule Docs plugin through the Add or Remove Programs tool on your computer.

Using the Plugin

After it is installed, the Capsule Docs plugin is enabled in all supported applications.

The supported applications are:

- Microsoft Office 2013 32/64-bit
- Microsoft Office 2010 32/64-bit
- Microsoft Office 2003 - 2007 32-bit
- Adobe Reader 8 - 11
- Adobe Acrobat Pro 8 and 9

If you use Capsule Docs with MS Office 2010 32-bit or lower: Changes that you make in the Capsule Docs menu are automatically applied when you click outside of the Capsule Docs menu.

If you use Capsule Docs with MS Office 2010 64-bit or MS Office 2013: You must click Apply for changes to apply to the document.
Using the Plugin

Creating a Protected Document

When you create a new document in a supported application, the protection settings of your default Capsule Docs community are applied to the document. You can change the settings through the Capsule Docs menu.

In some MS Office versions, the menu shows in the upper-right corner of documents. In others it shows in the Home tab.

Based on the permissions that your administrator gives you, you can:

- Change Classification
- Change Community
- Remove protection
- Add or remove users and groups
- Create Favorites lists of users and groups.

**Note** - the Favorites lists can be used across the supported applications, to share the documents with different sets of users.

Changing Classification

Each community has a set of classifications. The community administrator defines permissions for each classification. You can change the Classification of the document, if the applicable permission is set.

**To change the classification:**

1. In the Capsule Docs menu, click the arrow next to the current classification name.
   
   The drop-down list of classifications shows. You can hover over the names of the classifications to see the associated permissions.
2. Select a classification.

Changing Community

You can change the community association of the document to any community in which you are a member.

**To change the community:**

1. In the Capsule Docs menu, click the Settings icon.
   
   The drop-down list shows all the communities of which you are a member or the administrator.
2. Select a community.

Removing Protection

**To remove protection:**

Do one of these:

- Click the lock icon in the Capsule Docs menu - markings of the latest applied classification are not removed
- Apply **Personal** classification to the document - all classification markings are removed

Adding or Removing Users

To share a document with others, you can add them to the list of authorized users. You can add as many users or groups as your security permissions allow. The added groups can be internal or external. The added users can be categorized as one of these:

- **Internal** - User from one of the internal domains, as defined by the administrator
- **External** - User from a domain other than the internal domains
Using the Client Console

- **New** - User that was invited to view a document but did not register yet
- **Unknown** - User for which the state cannot be verified (can happen when an error in communication, or on a server, occurs)

**To add a user or a group:**
1. In the **Add group or people** field of the Capsule Docs plugin, enter the name of the group or the email address of a user.
   - **Note** - You can also select a user from the list of users imported from your Outlook address book.
2. Click the plus sign, or hit Enter.

**Creating a Favorites List**

You can create Favorites lists to save sets of users with the associated classification settings.

**To create a Favorites list:**
1. In the Capsule Docs plugin, click the star icon.
   - The **Favorites** pop-up window opens.
2. Enter a name for the new list.
   - The new Favorites list includes the users and groups currently listed in the plugin, with their classification settings.

You can also remove unused Favorites lists.

**To remove a Favorites list:**
In the **Favorites** pop-up window, click the remove icon next to the list name.

**Changing Your Password**

To change your password, click the Settings icon from the Capsule Docs menu and select **Change Password**.

This option is only for users who are not logged in with their Active Directory credentials or with Single Sign-On.

**Viewing a Protected Document**

You must have the Capsule Docs plugin installed to open the protected documents in their native applications. Otherwise, you can view them in the Capsule Docs Viewer.

**Using the Client Console**

To change the behavior and settings of your Capsule Docs plugin, make configuration changes through the Client Console.

**To open the Client Console:**
From the Windows Start menu, go to **All Programs > Check Point > Capsule Docs > Check Point Capsule Docs**.
The **Capsule Docs - Client Console** window opens.

From the **Client Console** you can:
- Change logged in user
- View classifications of Capsule Docs communities, in which you are a member
- Enable or disable the Capsule Docs plugin
• Configure the proxy settings
• Collect diagnostics for troubleshooting

After you make changes, click Close to exit the Capsule Docs Client Console.

Logging in as a Different User

When you install the plugin, your sign-up credentials are used for your default user configuration. You can switch users, if necessary.

To switch users:
1. In the Classification Service tab of the Client Console, click Switch User. Authentication Credentials window opens.
2. Enter the email and password of a different user.
3. Click OK.

Viewing Classifications from Other Communities

To view classifications from a community other than the current default one:
1. In the Classification Service tab of the Client Console, select a Community from the Show Classifications From drop-down list.
   The classifications of the selected community are shown in the table view below.
2. Select which classifications you want to see:
   • All - includes classifications that are configured in the Community, but are not available to you
   • Selectable in menu - includes only classifications that are available to you
   To view permissions set for a specific classification, select that classification from the table. The permissions show in the Your Rights section below.

Updating Capsule Docs Settings

Settings for the Capsule Docs communities are configured by the administrator.

When you run an update, all the classifications, security settings, users, and groups are updated.

To run an update:
1. In the Classification Service tab of the Client Console, click Update Now. The update progress window opens.
2. Click Close, when the update is complete.

Enabling and Disabling the Plugin

When you install the Capsule Docs plugin, it is enabled by default and lets you create and view protected documents. You can disable the plugin for troubleshooting purposes.

To temporarily disable the Capsule Docs plugin:
In the Client State tab of the Client Console, click Standby. The client will get enabled after the computer is rebooted.

To completely disable the Capsule Docs plugin:
In the Client State tab of the Client Console, click Disable. The client must be manually enabled.

To enable the Capsule Docs plugin:
In the Client State tab of the Client Console, click Enable.
Note - If you disabled the client through the Disable button, you must restart the computer after you enable it again.

Configuring Proxy Settings
Proxy settings are used when connecting to the Capsule Docs Cloud.
By default, the proxy is set to *Automatically Detected*. You can change the proxy configuration as necessary.

**To change proxy configuration:**
1. In the **Configuration** tab of the Client Console, click **Configure**. **Proxy Settings** window opens.
2. Select a setting:
   - **Use Direct Connection** - no-proxy configuration
   - **Auto-detect Proxy Settings** - automatic proxy configuration
   - **Manual Proxy Configuration** - you must specify the hostname and the port of the proxy server
3. Select **Use Proxy only if Direct Connection Fails**, if you want to use the proxy only as a backup method.
4. Click **OK**.

Collecting Diagnostics
You can collect some diagnostics data for troubleshooting purposes.

**To collect diagnostics data:**
In the **Diagnostics** tab of the Client Console, do one of these procedures:

| To collect only essential system logs: | 1. Click **Save Diagnostics**.  
Collect Diagnostic Output window opens.  
2. Choose a location where you want to save the logs.  
3. Click **Save**.  
   The diagnostic output files get collected and saved in a **.cab** archive.  
4. Click **OK**. |
| To collect a complete set of system logs: | 1. Click **Start**.  
The data starts collecting in a set of logs.  
2. Click **Stop**.  
Collect Diagnostic Output window opens.  
3. Choose a location where you want to save the logs.  
4. Click **Save**.  
The diagnostic output files get collected and saved in a **.cab** archive.  
5. Click **OK**. |
To collect a detailed log for a specific process:

1. Click **Dump Process**.
2. Select a process in the window that opens.
3. Click **OK**.
   
   The process memory dump is generated.
4. Click **OK**.
   
   **Collect Diagnostic Output** window opens.
5. Choose a location where you want to save the log.
6. Click **Save**.
   
   The diagnostic output files get collected and saved in a \*.cab archive.
7. Click **OK**.