



VITRIUM.COM



WHITE PAPER:

Document Security and DRM for Associations

An introduction to protecting and controlling your association's publications, documents, and content.

1.604.677.1500 (direct)
1.866.403.1500 (toll-free)

sales@vitrium.com
www.vitrium.com





Table of Contents

Ensuring Resources are Protected	3
Protecting and Controlling Files	4
Managing an Audience of Members and Customers	4
Distributing Content to Authorized Members & Customers	5
Document Protection and DRM: Common Use Cases for Associations.....	6
Online Training Materials.....	6
National and global codes and standards.....	6
Collected intelligence and industry reports and publications.....	7
Certifications and Accreditations	7
Board, committee, and confidential documents.....	7
Integration with Identity, Contacts, and Document Management Systems	8
Association Management Systems - Personify	8
Integration with other systems: CRM, LMS, ECM, DMS, eCommerce, Website, Email.....	10
Introducing: Distribute Secured Publications Through Vitrium's User Portal.....	10
About Vitrium Security	11
Benefits of Vitrium Security.....	11
How Vitrium Security works.....	12
Start Your Free 7 Day Trial of Vitrium Security	12



Ensuring Resources are Protected

An association, or member-based organization, such as institutes, foundations, councils, and societies, provide valuable services and knowledge to members and customers. This is done through training, certifications and accreditations, events and workshops, market reports, as well as standards and codes. For these services, they make considerable investments to create and distribute content and publications, and incorporate selling access to content to the core business model, aimed at increasing new member enrollment and current member satisfaction.

Associations provide documents and publications related to:

- **Training and Education**
- **Certification and Accreditations**
- **Events and Workshops**
- **Intelligence, Market, and Industry Reports**
- **Standards and Guidelines**
- **News and Communications**
- **General Resources**

The investment that associations make to create and distribute documents and publications is considerable. To protect investments, an association must develop a document security strategy that outlines how the content will be protected from theft, piracy, and illegal distribution.

Associations need a simple solution that empowers them to control how content is accessed, used, and distributed. A software solution that ensures that publications are sold in a personal and non-transferable manner, through a workflow that assigns publications to the appropriate user, while protecting access to these materials from unauthorized users. This is where document protection and digital rights management (DRM) comes in.



Time for a change.

Be proactive to establish your association's strategy to secure vital information

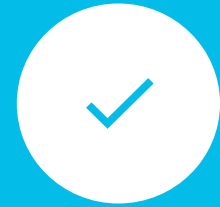




Protecting and Controlling Files

To start, a document protection solution encrypts and adds password protection to files. This protection happens at the file-level, meaning that even when the file is downloaded and taken offline, the protection still applies, and authorized users can still rightfully access the files. If the file is delivered via a secured weblink, where the contents of the document are accessed via a browser on any device, the same security settings apply.

In addition, an association's administrator can use the DRM solution to control how users interact with the file. Adding dynamic watermarks (those that include personal information to identify who is accessing the document) and restricting copying, printing, commenting, annotations, as well as setting printers and device limits, or even IP address limits, lets organizations determine how their files are used and distributed. All these controls can be applied at the file level, at the user level, or set generally for all materials used by the association – in other words, DRM protection and controls are highly customizable and adaptable to any business model.



Document Controls

- ✓ Set printing, copying, highlighting & annotations controls
- ✓ Customize watermarks and apply dynamic data to them
- ✓ Customize login forms, settings, policies, and more
- ✓ Set document expiry dates or revoke at any time

Managing an Audience of Members and Customers

The audience of the content, in this case the association's members or customers, are defined as 'users'. Users are managed individually or in batches, using the admin dashboard of the DRM application. In many cases users are managed from the existing Association Management System (AMS) or other identity and contact management system, like Customer Relationship Management (CRM), Active Directory, or another database.

For example, if your association currently stores member contacts in an AMS like Personify, integrating your AMS system with a DRM solution like Vitrium Security allows you to control which members have access to which files within the AMS system that you are already familiar with. Should you use the AMS online marketplace functionality, you can sell Vitrium secured files through the AMS system. If you do not have a system like this, you can upload a batch of users from a simple Excel sheet into the Vitrium Security administrative dashboard and apply the access and security settings to the documents for each and all users.

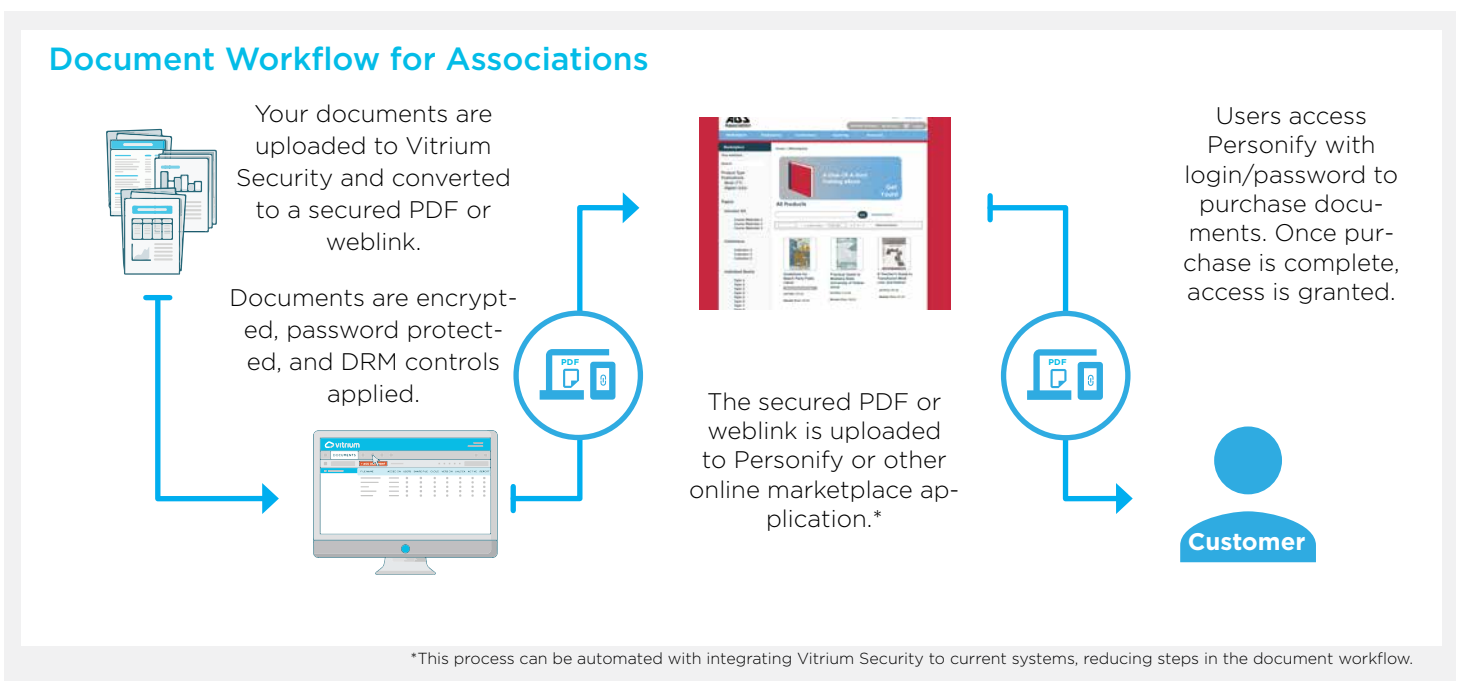




Distributing Content to Authorized Members & Customers

As your content is uploaded to Vitrium Security and protection applied to files, they are ready to be distributed to users without fears that they may be forwarded or shared with unauthorized individuals. The process of uploading files to Vitrium Security can also be automated through integration with your current workflow for content distribution or document management system (DMS). If presently you are uploading content to a Web Portal, eCommerce application, Shopping Car system, or simply your website, Vitrium Security becomes the security pitstop your file takes to be equipped with protection and control layers before being uploaded to your digital marketplace. Through integration, this process can be automated to the point that Vitrium Security operated in the background of your document workflow process, nearly invisible.

If a new member or customer comes to your website, registers or subscribes for paid access to a file, their login and password credentials are added to your contact management system, and access to the secure file granted. In many cases, the components of document security take place in the background, and audience members will only be aware of the security measures in place should they breach the security policies your administrator has set up for the materials.





Document Protection and DRM: Common Use Cases for Associations

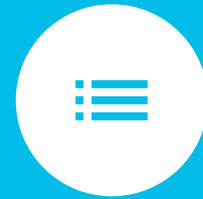
Online Training Materials

Educational materials such as books, guides, case studies or other types of documents are key instruments in providing members and customers online training and education services, and important revenue sources for associations. Document security and DRM solutions like Vitrium Security empowers associations to confidently upload their materials online and market them individually or through a subscription model. With such a solution in place, document security is simplified and association administrators can be confident that investments made in creating or acquiring educational materials are protected, as these solutions prevent materials from being forwarded, shared, or copied.

National and global codes and standards

A digital rights management solution allows associations to control how documents containing codes and standards are accessed, distributed, and used. It empowers an organization to monetize the distribution of publications, to offset publication costs, and to reinvest in the development of updated standards for processes and operations within an industry. As standards make it easier and cheaper for organizations to access new markets and technologies, they benefit not only consumers, but also companies, and are valuable documents that merit protection and control by those that own it.

Legislative and government bodies also access codes and standards documents to evaluate best-practices that drive policy and economic decisions. With a varied audience, the page and user-level analytics of content



User Controls

- ✓ Add, modify or delete users & groups
- ✓ Define DRM policies at user, group or global level
- ✓ Assign, change or revoke permissions at any time
- ✓ Set device, browser & IP limits
- ✓ Track user activity & export reports





usage present in DRM solutions like Vitrium Security can be used as intelligence to determine not only what goes on future publications, but also which direction the industry should be heading.

Collected intelligence and industry reports and publications

Whether it collects data and information to compile its own reports, or it hires costly external consultants to provide expertise as market reports and intelligence for members, an association investments in valuable documents warrant some control as to who can access these. Vitrium Security empowers associations to protect their investment in intelligence report as well as control and track the way it is distributed within its member base.

Certifications and Accreditations

Certification and accreditation course materials involve a large investment by associations. A digital rights management solution can help protect that investment by preventing leaks and ensuring that only paying individuals have access to course materials. With easy integration for Vitrium Security into existing systems, and easy access to secured materials for members of the association (since Vitrium protected files can be accessed on any device with no plug-in), your accreditation program course materials and investments protection is simplified.

Board, committee, and confidential information

A document security and DRM solution simplifies the way associations control exactly which members can access each confidential or sensitive document. Within a single account, administrators can manage sub-groups of users and determine which documents are accessible, for how long, and what type of interactions are allowed with the content. A sub-committee working to determine pricing strategies, or a charter examining information that is sensitive to its operations can confidently share that information knowing that it will only reach those that have clearance. Important financial data and strategies compiled into documents can be tracked and traced, and access to them monitored and recorded in real-time.



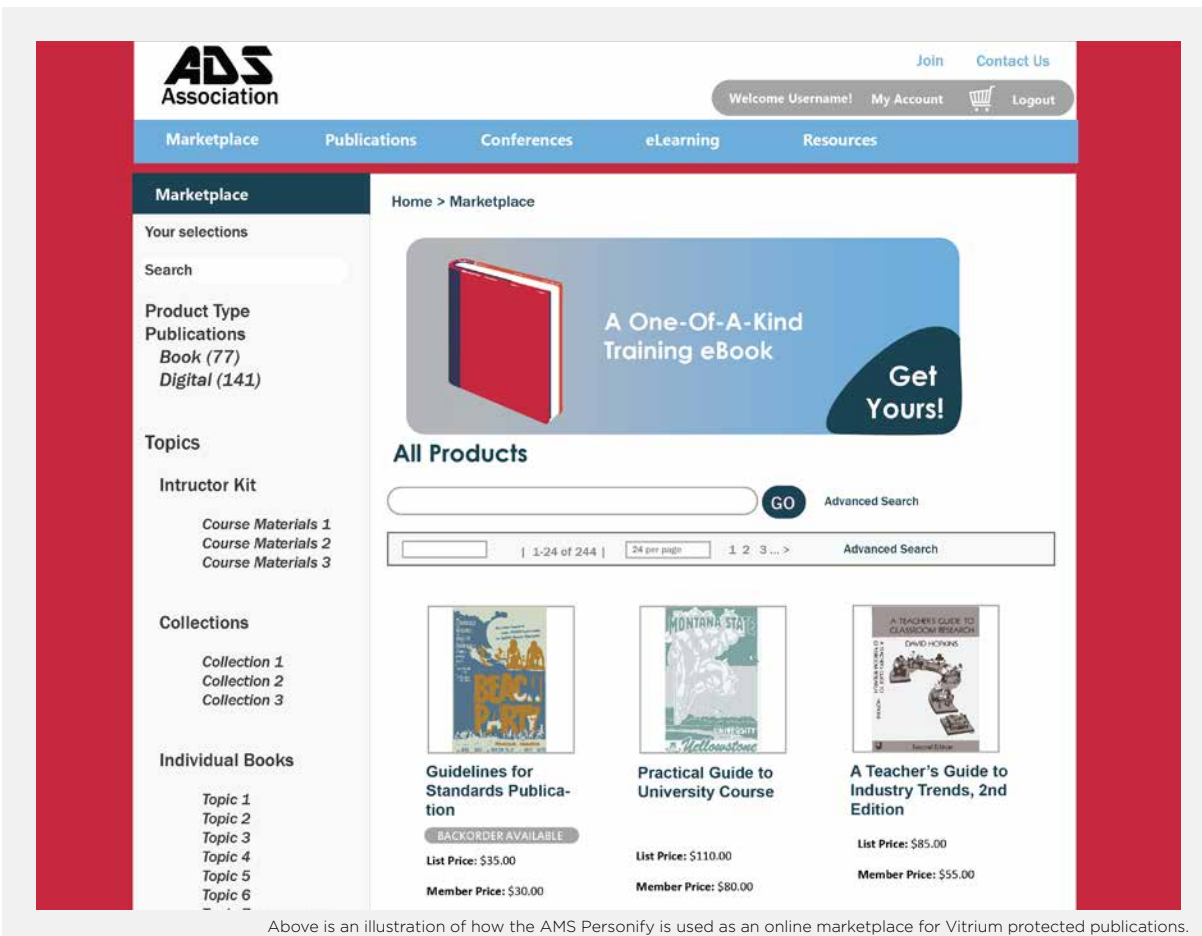


Integration with Identity, Contacts, and Document Management Systems

Association Management Systems – Personify

The use cases explored so far – be it online training, publishing codes and standards, distributing intelligence and market reports, enabling a certification program, or protecting sensitive board documents – all involve similar aspects of document workflows. In each scenario, documents are published, protected, and distributed to a specific audience. In the case of an association, the audience is members or customers that pay to access publications prepared or sourced by the organization.

An Association Management System empowers member-based organizations to manage the relationship with constituents on multiple levels. Through these systems, associations not only keep an updated database of member data, but deploy an online marketplace and user portal for the various services and activities the organization promotes.



Above is an illustration of how the AMS Personify is used as an online marketplace for Vitrium protected publications.



Meetings can be arranged, committees organized, and communications delivered. In addition, an AMS system like the popular solution Personify, provides membership summary information and serves as an online portal where publications, conferences, eLearning, and resources can be accessed and purchased by members. Other transactions like donations and membership fees can also be managed through its payment processing functionality.

A document security and DRM solution like Vitrium Security integrates directly with AMS systems such as Personify. Digital publications and documents are secured with Vitrium and the PDF file or Secured Weblink uploaded to Personify's marketplace. When a member logs in to their Personify account and access the association's digital content marketplace to purchase publications, their login credentials automatically register with Vitrium and access is granted.

Through Vitrium's easy integration with AMS systems, true single sign-on functionality is achieved, where a user just needs to log in to one portion of the authentication process and those credentials apply to all files related to the account. All this is done without the user being aware that a document security and DRM solution like Vitrium is part of the process. For as long as the association gives access to the files and the user is logged in, they will be able to access their content.



Seamless Access

- ✓ No plug-ins or apps required for users to access content
- ✓ Publish and share secured content via a customizable user portal
- ✓ Web & mobile-friendly access with Vitrium's HTML5 web viewer
- ✓ Compatibility with Adobe Reader & Acrobat PDF viewers
- ✓ Easy to use administrator interface





Integration with other systems: CRM, LMS, ECM, DMS, eCommerce, Website, Email

Similar integrations as those done with AMS systems are available for other types of solutions. Companies using software solutions like Customer Relationship Management (CRM), Learning Management System (LMS), Enterprise Content Management (ECM), Document Management Systems (DMS), to manage their document processing and audience data are also able to integrate a DRM solution like Vitrium Security as part of their document workflow. This is easily done either through using our RESTful APIs or engaging Vitrium's implementation team.

Other types of integration are also available for commonly used methods of distributing content online. If an association or member-based organization is distributing content through emails, an eCommerce platform, or any other form of web portal, a document security solution can integrate to match and automate those processes.

Introducing: Distribute Secured Publications Through Vitrium's User Portal

For associations starting out on the training, certification, or publishing materials, administrating a large volume of documents and users can be cumbersome. Vitrium has developed a built-in user portal that offers small associations and member-based organizations a secured online space to distribute protected documents. Your members or customers simply log in to the user portal and access all secured documents associated with their account. Instead of having to login to each individual document with their credentials, users benefit of single sign-on functionality. It functions much the same way that a web portal or digital publication portal of an AMS system.

The portal is highly customizable allowing associations to choose their own colors, add logos, and create a custom URL. Easy to manage and update, as well as offering your audience and easy place to track and access their purchases, the portal facilitates document distribution and use. All analytics and reporting functionality of the secured files and weblinks are still tracked.





About Vitrium Security

We invite you to explore some of the benefits of using Vitrium Security. Our popular document protection software can help you limit the risk of your content being copied, leaked, shared, or stolen. Your PDF and Office files are instantly protected, ready to be distributed, and easily viewed by your audience. You can choose to publish the secured content to a user portal, send via email, or post to your own website, document management system, learning management system (LMS), eCommerce site, or other portal. Whatever method you choose, the files always remain secured no matter where they go.



Vitrium Security is trusted by hundreds of companies around the world to protect their documents and millions of readers have accessed our secure documents.

Benefits of Vitrium Security



Easy to use, for you and your audience. Vitrium's intuitive software lets you manage your files, set up users and groups (this can also be managed through a separate system or database), define DRM policies, choose your distribution method, and access real-time analytical reports. Your audience easily accesses your content on any device, without the need for plug-ins or apps.



Distribute your files with confidence. Your files are secured with Vitrium's **military grade 256-bit AES encryption**, and the layers of protection travel with your file, online or offline, so that even in case of theft or leak, your content remains secured. After uploading your files to Vitrium Security, you will have access to a secured PDF or a secured Weblink to share with your audience.



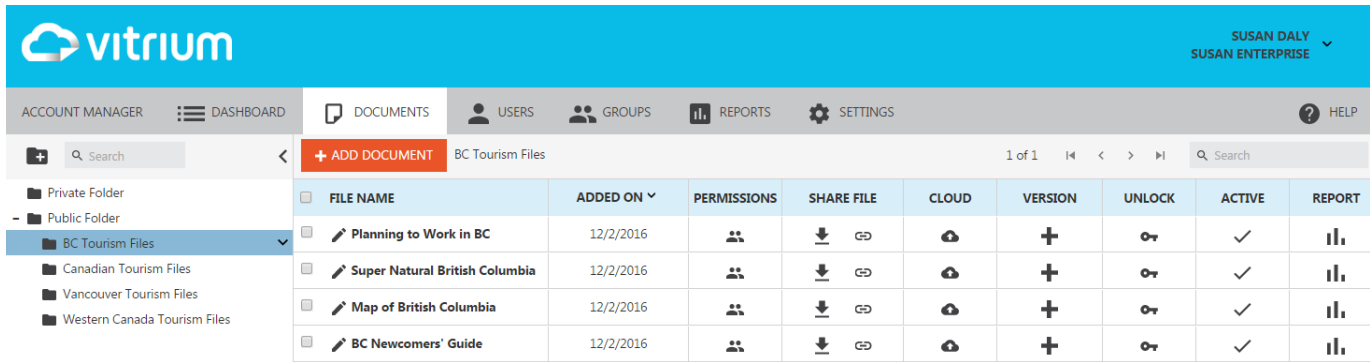
Your content, your power to decide. Vitrium Security gives you **full control** over your content - you can block printing & copying, set browser limits, apply dynamic watermarks, set expiry dates, and more. You can also retain this control after the content has been distributed as you can revoke a document at any time, replace the content, or deactivate a user - all within the Vitrium admin panel.



Set up your own customizable content portal. Securely distribute your documents via Vitrium Security's customizable user portal, where authorized audience accesses all documents associated with their account in one place. Provide the best experience to by customizing with your colors and logo, and a customizable URL.



Improve the way you do business. With Vitrium Security's **dashboard and analytical reports**, you can track the activity of your users and their behaviors, providing you insight into your business. Know which files are being accessed, what pages are being read, and which users are truly engaged. With Vitrium's new User Portal, your document store is instantly created and tracked.



How Vitrium Security Works



Add Files

Add your files to Vitrium's cloud-based content security software. We also offer an installed, on-premise version. Acceptable file formats include PDF, Word, Excel and PowerPoint. Video and images to come in 2017.



Add Users & Groups

Select the audience for your content. Decide who can access your secured files, place them in user groups, or leave them as individual recipients. Vitrium can also be integrated with your own user credential system.



Apply Security & Controls

Protect your files with military-grade 256-bit AES encryption and control access by setting various limits - viewing, browser, date, IP address limits and more. Block printing & copying, and insert dynamic watermarks.



Share With Users

Publish and share secured content as attachments or secured weblinks in a customizable user portal, through your own web portal, eCommerce site, or any other system such as document management system, association management, ECM, LMS, or via email.

We can help you integrate Vitrium Security with any system you might be using.



Next Steps

To learn more about Vitrium Security visit www.vitrium.com and **start using Vitrium Security today.**

Start a Free Trial

www.vitrium.com/start-free-trial

Schedule a Demo

Visit www.vitrium.com/demo