



# Egress Administration Panel User Guide

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# Egress Administration Panel

## User Guide

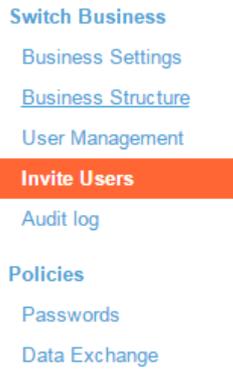
This guide provides instructions for using the Egress Administration Panel, which helps business administrators set up and manage their users. The following administrative functions can be performed at <https://switch.egress.com>.

Egress business account administrators, like standard users, can use the Egress Administration Panel to manage their own account settings, passwords, and packages, as well as use Egress Web Access. This guide focusses though on the business account and user management aspects of the administration panel.

# Inviting users

If Active Directory Federation Services (ADFS) is not set up to enable Single Sign-On, you will need to invite users to set up their accounts before they can join your business account.

- Sign in to your Egress account at <https://switch.egress.com> and on the left-hand menu select **Invite Users**.



*Note: To learn how to enable ADFS, please see the [Egress ADFS Configuration Guide](#).*

## Invite a single user

1. Select **Invite Users** then select **Invite Single User** to open the invitation form.



2. Complete the required name and email address fields.

First name:*	<input type="text"/>
Middle name:	<input type="text"/>
Last name:*	<input type="text"/>
Email address:*	<input type="text"/>

3. It is possible to organise users into directories to more easily manage them and apply settings to groups of users. After filling in their name and email address, specify the directory location where the user will be added. See [Creating a business structure](#) for more details on organizing your business directory.
4. Assign the user a role. Default roles are described in the table below.

Role	Description
Read-only	Can access existing packages
Author	Can access existing and create new packages
Limited Author	Cannot send to Free Subscribers
Auditor	Can see other users and their packages

Power User	Can see other users and modify their packages
Administrator	Unrestricted access

- Set the user's password, or leave the password fields blank so that the user can create their own.

Password:   
 Confirm password:   
Minimum 8 characters, with at least 1 UPPER case or number

- Add a personalized note to the invitation email, for example linking to your intranet site where further documentation about Egress is available. This step is optional.
- Press **Invite** to send the invitation.
  - Reminders are automatically sent out once a week if the user has not activated their account. After one month, the invitation expires and will need to be resent.

## Invite multiple users

- Select **Invite Users** then click **Invite Multiple Users**.



- Enter the details of the users you wish to invite. The format is **first name, middle name, last name, and email address**. Make sure you separate each value with a comma and note that the middle name field can be left blank and comma separated, e.g. *John, , Smith, johnsmith@egress.com*.

**Invite multiple users** ✕

Please enter a comma-separated list of users to invite below.

Choose data format:

Michael, W., Smith, [michaels@egress.com](mailto:michaels@egress.com)  
 Marcel, , Rose, [mruzicka@egress.com](mailto:mruzicka@egress.com)  
 Matthew, Thomas, Williams, [matthew.t.williams@egress.com](mailto:matthew.t.williams@egress.com)

Import from a CSV file:  No file chosen

Choose a role to be assigned to the users when they join.

Directory location:

Role:

Invited users will receive an email with an activation code. You may want to include a brief personalized message in this email.

Send emails now

- Alternatively, add multiple users simultaneously by importing a CSV file. Click the **Choose File** button to do this. The default format for this file is the same; *first name,*

middle name, last name, and email address. The CSV data is parsed and displayed in the box provided.

4. Define the users' directory location and role. Include a note with the invitations if you wish, and press **Invite** to confirm the invitation.

## Creating a business structure

Creating a business structure within your Egress business account provides a useful way to organise and manage your users.

1. Sign in to your Egress account at <https://switch.egress.com>.
2. Select **Business Structure** on the left-hand pane. Select **New Organizational Unit (OU)** to add a new group.
3. Give the OU a name and provide a directory location. The new unit will always appear under the location you select. Press **Create** to generate the OU.

You can also create subordinate OUs, producing a branched structure:

### Business Structure

Organization unit deleted successfully.

Please define organization structure of your business account below:

Name	Full path	Users count	
<a href="#">Demonstration Account</a>	/	10	
<a href="#">Adult Services</a>	/Adult Services	0	
<a href="#">Team 2</a>	/Adult Services/Team 2	0	✘
<a href="#">CS</a>	/CS	0	
<a href="#">Child Services</a>	/CS/Child Services	0	✘

The user's position in the organizational directory will be displayed next to their entry as a path.

## Automatic account creation

When your Egress business account is created, your Egress Technical Account Manager will collect a list of internal domains from you. Users with these domains who sign up without an invitation will have an account created for them automatically. This typically occurs when a user receives an encrypted email from a paying subscriber and signs up as a free user in order to open it. These users will be moved into your business account automatically. As before, you can

specify the group they are moved into and the role they are assigned. If you like, you can create a group for these users, for example **Self-Registered Users**.

### Invite Users

There are currently [12 user\(s\)](#) associated with this Switch Business account.

#### Automatic account creation

Users with email addresses `*@demonstration.com` will be automatically added to this business account, without explicit invitations, with the following settings:

Directory location:	<input type="text" value="/Self-Registered Users"/>
Role:	<input type="text" value="Author (can access existing and create new packages)"/>

[Change](#)

# Managing user settings

The Egress Administration Panel lets you view and manage the users in the business account under your administrative control. This includes resetting user passwords, updating user details and viewing user statistics. Find much of this user management functionality in the **User Management** window.

- After signing in to the Administration Panel, press **User Management** on the side-bar menu to open a list of the users currently associated with the business account under your administration.



Each user entry includes:

- Egress ID (email address and name)
- Role level e.g. Administrator
- User path (see here for details)
- Three option icons:
  - **View packages** – view a list of packages created and sent by the user 
  - **Edit user properties** – opens the **Edit user** window 
  - **Delete user** – Remove the user from your business account 

## Search

You can search for a specific user with the Search bar.

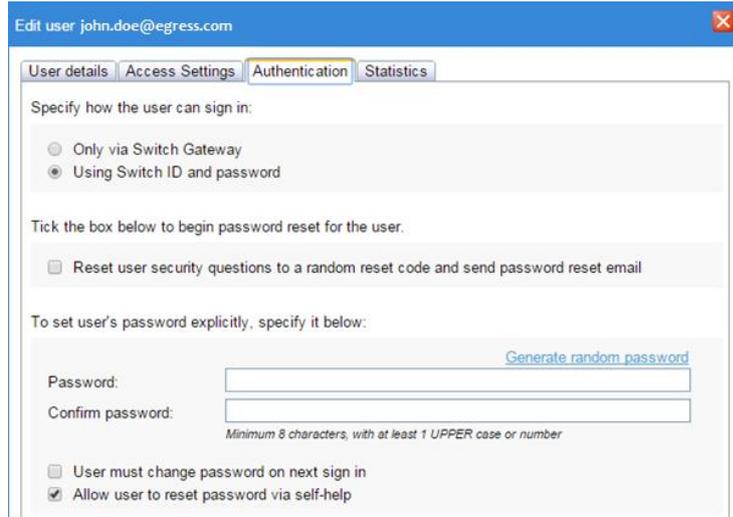
Search:

- The search feature is very specific. Searching for “john” will return only the accounts beginning with “john.” Hence, use asterisks in the search term to search for any users containing that search term. E.g. searching for “\*john\*” will return the user “jim.john@egress.com” whereas searching for “john” would not.

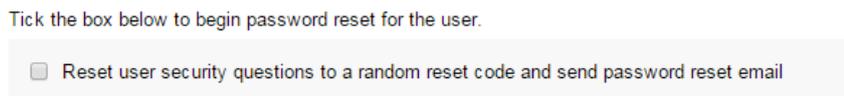
## How to reset user passwords

Users in your business account can reset their own passwords if they remember the answers to the security questions they provided when creating their Egress account. They can do this by visiting <https://switch.egress.com> and selecting **Forgot Your Password?**. If the user does not remember their security answers a business administrator or help-desk staff member can reset it for them or set it explicitly.

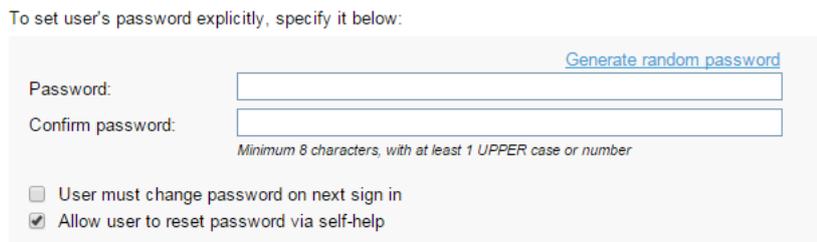
1. Click on **User Management** on the sidebar and navigate to the user whose password you wish to reset.
2. Click on the relevant user within the **User Management** panel and select the **Authentication** tab in the **Edit user** window.



3. There are different ways to reset a user’s password:
  - a. Tick the box to **Reset user security questions** to a reset code and send a password reset email. The user receives the password reset email asking them to follow a link. The business account administrator receives a reset code and provides this to the user so that they can enter it when prompted. They will need to create a new password and set new security questions.



- b. Explicitly create a new password for the user, or generate a random password. This method also includes the options to force the user to change their password after their next sign in and allowing the user to reset their password via self-help (clicking **Forgot your Password?** Before sign-in and following instructions).



4. After choosing which method to use to reset their password press **Save** to confirm the action. The user will receive an email either notifying them of the password change or prompting them to enter the reset code and choose a new password and security.

## Specifying user sign-in options

In the **Authentication** tab of an **Edit User** menu, it is possible to specify how the user can sign in.

- **Only via Egress Gateway:** Prevent signing in on both the Egress Client and the Web UI. Useful for avoiding situations where someone signs in with personal email address, encrypts a group mailbox email and Egress Gateway processes it under the group mailbox Egress ID, preventing it from being signed into, apart from an admin managing their packages.

- **Using Egress ID and password** is the default sign-in method.

Specify how the user can sign in:

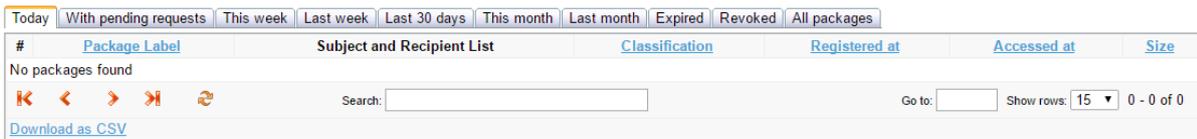
Only via Switch Gateway  
 Using Switch ID and password

If Single-Sign-On is configured, there are further options:

- **None:** Gateway can send on behalf of the user but that is all. Knowing a user's password isn't enough to sign in.
- **Password:** User can sign in with password. Useful for management accounts so that if the ADFS/AD password and Exchange mailbox are compromised the rogue admin still cannot read encrypted mail.
- **SSO:** User can only sign in with SSO, but not with password.
- **SSO + Password.** Either SSO or Password.

## Editing user packages

Administrators within a business account can modify and edit user packages. To do this, navigate to **Sent Packages** in the side-bar menu. The Sent Packages window by default shows details for a user's own packages, with the various tabs showing various time ranges.



However, administrators can view and modify the packages of other users, as well as their own. This can be done by selecting All users from the dropdown option, or choosing a specific user to view only packages under this Egress ID.

### Sent Packages

Manage, sort, filter, and track the information you share in real-time. You can also change security and access settings for the packages you share, even after it has left your physical control.

Switch user:

Emails can be revoked and details such as the selected Classification can be edited in this view.

**Subject:**   
**Classification:**   
**Tags:**   
**Status:**   
**Valid from:**   [clear](#)  
**Valid until:**   [clear](#)  
**To:**

**Status** can be modified to revoke an email immediately, or set a Revoked package to **Active**. In addition, the list of recipients can be modified in this view, allowing administrators to selectively ensure access to secure content is given only to those who require it.

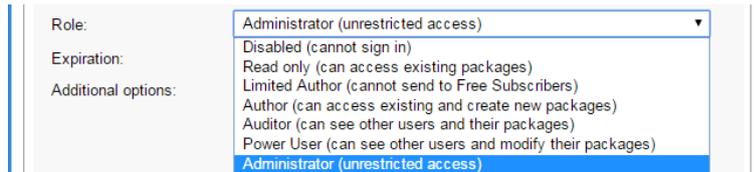
## Changing user roles and privileges

User roles are applied during the invitation process but can be changed at a later date.

1. Go to **User Management** and select the relevant user.



2. In the **User details** tab choose the appropriate role from the drop-down menu.



3. Press **Save** to confirm the role change.

## Index of user roles

- **Disabled** — the user cannot sign-in to the Client, and so cannot send or receive packages.
- **Read-only** — the user can only access secure packages that have been associated to them. They cannot create their own packages and send them to others.
- **Limited Author** —the user can access secure packages that have been associated to them. They can only create and send secure packages to other paying subscribers. They cannot send packages to free users.
- **Author** — the user can create and share secure packages using the Egress Client. First-time users are given a number of credits for free, so every user that signs up for an Egress ID is automatically an Author until these credits are used. Authors in an Egress business account can create and share unlimited packages.
- **Auditor** — the user can create and share Egress Packages. They can view packages created by another Egress user account listed in the same organisation.
- **Power User** — the users can create and share Egress packages. They can view and modify packages created by any other Egress user account listed in the same organisation.
- **Administrator** — the user has full unrestricted access to Egress packages and users listed under the same organisation. A Egress Administrator also can also modify existing individual roles as well as remove legacy user accounts from the system.

## Additional privileges

You can grant additional privileges to users without giving them a higher role. After selecting the user from the **User Management** panel, the options for additional privileges are available in the **User details** tab:

- **Can Reset Passwords** – the user can reset user passwords.
- **Can Invite New Users** – the user can invite new users into your business account.

- **Can Access Subordinate business accounts** – the user can access and change the settings of any business accounts linked to their own.
- **Shared account** – the user shares their account with others and does not want the other users to access contents of packages made using the account.
- **Server account** – the user gains some permissions to manage gateway issues, such as decrypting on the domains in the wildcards.

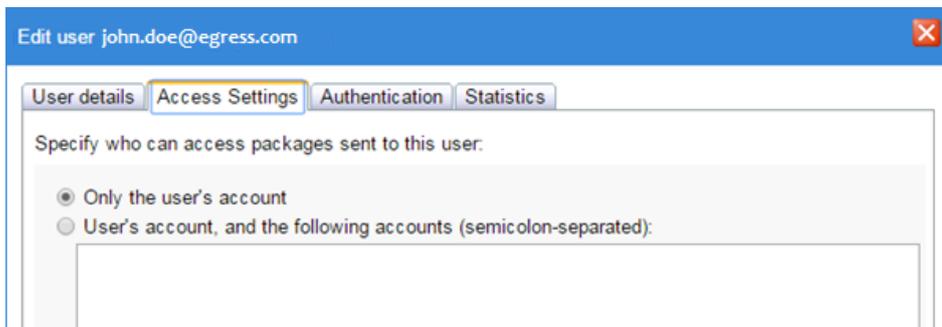
Additional options:

- Can reset passwords (Help Desk)
- Can invite new users
- Can access subordinate business accounts
- Shared account (cannot access own packages)
- Server account for

## Configuring user access settings

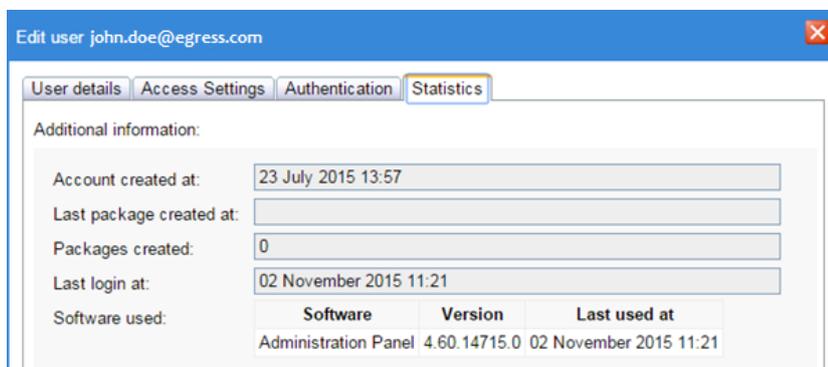
The **Access Settings** tab allows you to choose additional user accounts that are also able to access packages sent to the selected user.

1. Select the user from the **User Management** menu then go to the **Access Settings** tab.
2. Check the box **User’s account, and the following accounts** and then add the other user accounts you wish to have access to the received packages. With semicolons, separate the accounts added.
3. Press **Save** to confirm.



## Viewing user statistics and audit logs

The **User Management** menu lets you view statistics of users in your business account.



Press the **Audit log** button on the sidebar to view all events in your business account in the last 30 days, including the date, time and description of each event. Descriptions list the user involved and the action they performed.



There is also the option to download the log as a CSV file.

### Audit log

Events for the last 30 days are displayed.

#	Time	Description
1	17 Nov 2015 14:39	Security questions changed for user <i>john.doe@company.com</i>
2	17 Nov 2015 14:39	User <i>john.doe@company.com</i> changed password

# Managing policies

## Ensuring password complexity

When you send an invitation email and the user sets up an Egress account, they will be required to enter a password with a minimum of eight characters (including one upper case or numeric character). This complexity requirement can be adjusted to suit your requirements.

1. In the **Policies** section of the sidebar menu, select **Passwords**. In the Passwords window, there are three tabs:
  - **Password Policy** – Manage the complexity requirements of the passwords.

Password Policy | Security questions | Advanced

Specify password policy requirements:

Min. password length:

Additional options:

- Require lowercase characters
- Require uppercase characters
- Require numeric characters
- Require upper case OR numeric characters
- Require special characters

Note to users:

Expiration, days:

Restore Defaults | Save

- **Security questions** - Modify the list of security questions available for users to choose from when setting up their account.

Password Policy | Security questions | Advanced

Users associated with this Switch Business account may be allowed to reset their own password, if their answers to the security questions match the answers specified during registration.

You may customize the list of questions offered, by typing your own questions into the list below, one question per line.

List of questions:

What high school did you attend?  
In what city do you work?  
What is your favourite vacation spot?  
What is your favourite movie?  
What colour was your first car?  
What is your favourite sports team?  
On what street did you grow up?  
What is your favourite book?  
What is your mother's maiden name?  
Where were you born?  
What was the name of your first friend?  
What is your favourite activity?  
What is your favourite colour?  
What was the name of your first pet?

Questions to answer:

Show questions in random order

Restore Defaults | Save

- **Advanced** – Specify the IP addresses from where users can sign in, divided into **All Users, Privileged accounts, and Gateways**. Also, specify consequences for privileged users (e.g. Power Users or Administrators) who try to sign in from IP addresses not in the **Privileged accounts** IP range.

Advanced

Specify comma-separated list of addresses from where users can sign in, using CIDR notation. For example "172.16.0.0/24,10.12.0.0/16". Your IP address, as seen by this server, is 91.108.162.50.

All users:

Privileged accounts:

Gateways:

When a privileged user, such as Power User or Administrator, attempts to sign in from an IP address in the "All users" but not in "Privilege accounts" IP ranges:

Sign in option:  Reduce user's privileges to Author  
 Disallow sign in

Other options:

Options:  Enable user account lockout  
 Enable gateway account lockout  
 Require strong service passwords

Restore Defaults Save

## Allowed data exchange mechanisms

Using the Egress Client, users can transfer information securely through any form of electronic communication. This includes secure email, large file transfer, CDs, and USBs. Business administrators can define exactly which data exchange mechanisms are available to users in their business account. This can be applied across the account or to specific OUs.

- Press **Data Exchange** and tick the relevant options then press **Save** to apply the changes.

## Data Exchange

Please choose data exchange mechanisms that may be used by users in your Switch Business account.

<input checked="" type="checkbox"/>  <b>Secure CD/DVD</b> Create an encrypted CD/DVD that is only accessible to the intended recipients	<input checked="" type="checkbox"/>  <b>Normal CD/DVD</b> Burn a regular unencrypted CD or DVD
<input checked="" type="checkbox"/>  <b>Secure Email Attachment</b> Send email with attachments protected from unauthorized access	<input checked="" type="checkbox"/>  <b>Secure Email</b> Send email with text and attachments protected from unauthorized access
<input checked="" type="checkbox"/>  <b>Unprotected Email</b> Send email with attachments not protected from unauthorized access	<input checked="" type="checkbox"/>  <b>Switch Package</b> Create an encrypted package to store on a file server or USB stick
<input checked="" type="checkbox"/>  <b>Upload to Egress Cloud</b> Upload data securely to the cloud, and send recipients an address	<input type="checkbox"/>  <b>Internet server</b> Create and manage your own FTP and HTTP connection bookmarks
<input type="checkbox"/>  <b>New Server</b> Create a new server	

Save

*Note: It is also possible to add additional options here, for example pointing to your own FTP/HTTP server. Please ask your Egress Technical Account Manager for more details.*

## Editing business settings

From the Administration Panel, you can amend your business details.

- On the side-bar menu, press **Business Settings**. The **Business Settings** window contains three sets of details about your organisation:
  - Company details (company name and address)
  - VAT ID if the company is VAT-registered.
  - Details of the people in the organisation responsible for billing and support in the business account.
- Change the business details you wish to change. Note that if a specific field is greyed-out then the field is not amendable.
- Press **Update Account** to save the changes and update your Egress business settings.

# Egress support centre

Should you encounter any problems with Egress please visit the Egress Software Technologies Support Centre [www.egress.com/support](http://www.egress.com/support).

## Useful contact information

### Telephone numbers:

Egress Europe: +44-844-8000-172

Egress North America: 1-888-505-8318

Egress Australia: 1-800-768-043

Egress Singapore: 800-130-2208

### Website and email addresses:

Egress website address: [www.egress.com](http://www.egress.com)

Egress Sales: [sales@egress.com](mailto:sales@egress.com)

Account Services: [accountservices@egress.com](mailto:accountservices@egress.com)

Support: [support@egress.com](mailto:support@egress.com)

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LinkedIn: <https://www.linkedin.com/company/egress-software/>

Egress blog: <https://www.egress.com/blog/>

## Egress Software Technologies Ltd

Egress Software Technologies is the leading provider of information security services designed to secure shared data from start to finish using a single platform: Egress.

The Egress platform is made up of highly integrated and flexible service lines. These award-winning services include email and document classification, the only email and file encryption product to be CPA certified by NCSC, secure managed file transfer, secure online collaboration and secure archive.

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