Egress Switch Secure Workspace quick start guide

What is Egress Switch Secure Workspace?

Egress Switch Secure Workspace is a secure, cloud-based collaboration platform designed to help users share files and collaborate effectively, both internally and externally. It ensures that data is kept secure both at rest and in transit, and integrates seamlessly with existing document management systems. It does all of this whilst maintaining Switch's award-winning ease of use.

Stage one: Accessing Switch Secure Workspace

1. Navigate to your Switch Secure Workspace web address using any internet browser. This should have been issued to you by your Egress Support representative.

2. At the Egress Switch sign-in page, sign in with your Switch ID. Alternatively, since Egress Switch supports single sign-on, you may be able to sign in using your usual system ID.

You will have been assigned a specific user role which determines the actions you can perform on Switch Secure Workspace. Some of the features in this guide may not be available to you if you do not have the required permissions.

Stage two: Creating a new zone

A zone is a secure area for uploading files to share with internal and external recipients.

1. To create a new zone, select **My Zones** on the sidebar, then press **New Zone**. Choose a zone template and then select **Create**.
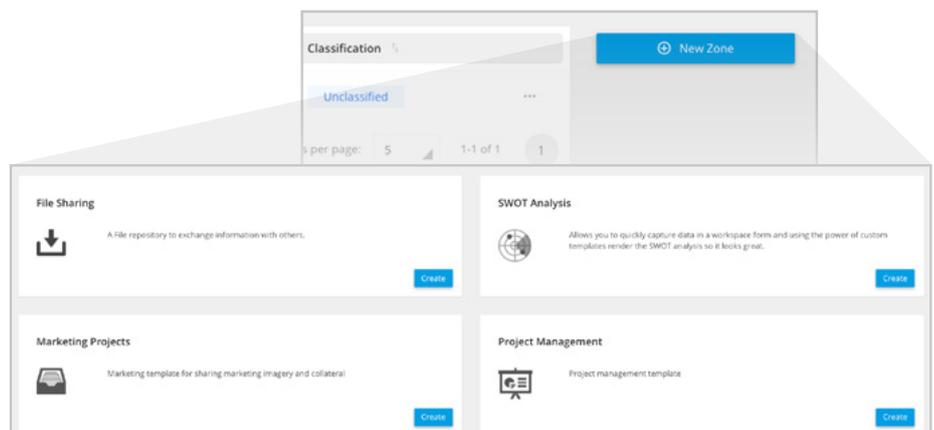
2. Give the new zone a title and a description. Use the dropdown menu to specify the security classification of the zone.

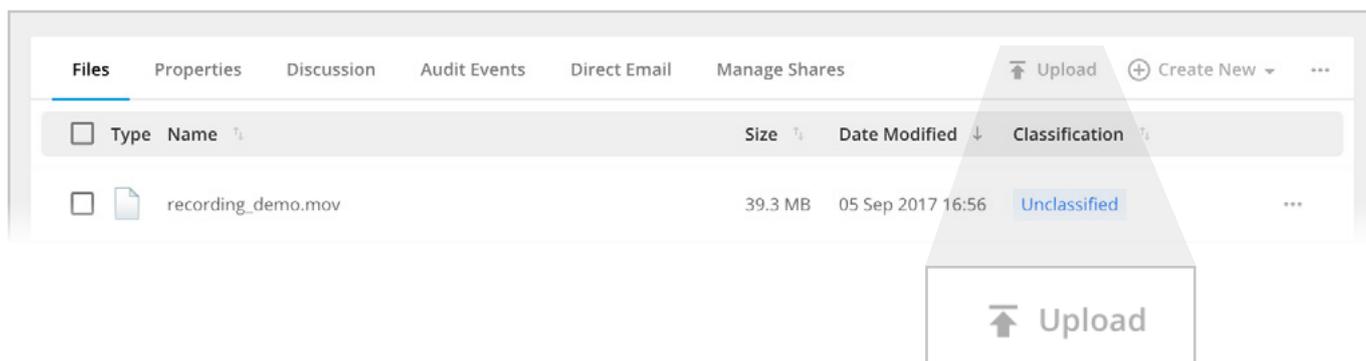**3.** Make the zone active using the tick box at the bottom of the page.

☑ Active

4. Press **Create Zone** to create the zone.

Create New Zone

Title

| Title |

Our Ref

WKS-JCS-3101180912

Description

Classification

Unclassified

Watch Status
☑ Users watch by default

Status
☑ Active

Cancel   Create Zone

Stage three: Adding files to a zone

1. To add files to a zone, navigate to the zone using **My Zones**. Select the zone you wish to add files to, and then press the **Upload** button.

	Files	Properties	Discussion	Audit Events	Direct Email	Manage Shares	⬆ Upload	⊕ Create New ▾	⋯
☐ Type Name ⬍						Size ⬍	Date Modified ↓	Classification ⬍
☐ 📄 recording_demo.mov						39.3 MB	05 Sep 2017 16:56	Unclassified ⋯

⬆ Upload

2. Press **Select Files** to browse for files, or simply drag and drop them into the window. Use the **File Expiry** options to set availability and expiry dates for your files, restricting when others users can access them.

3. Press **Upload** to upload the files. Once uploaded, files appear in the main zone window.

• Click on a file to view it in-browser using the built-in Document Viewer.

Upload

Upload Files

Filename   Size   Status

📄

Drop files here

or add files by clicking the "Select Files" button below

Select Files

File Expiry
Available From   Available To

Close   Upload

Stage four: Sharing a zone

1. To share a zone with other users, click the **Share** button on the right hand side of the zone.

2. This opens the share dialog box. To share with other users:

- Enter their email address(es).
- Select the access level you wish to give them.
- Select whether they should receive an invitation email.

3. Press **Share**. The new users will be automatically granted access to the zone and sent an invitation email if specified.
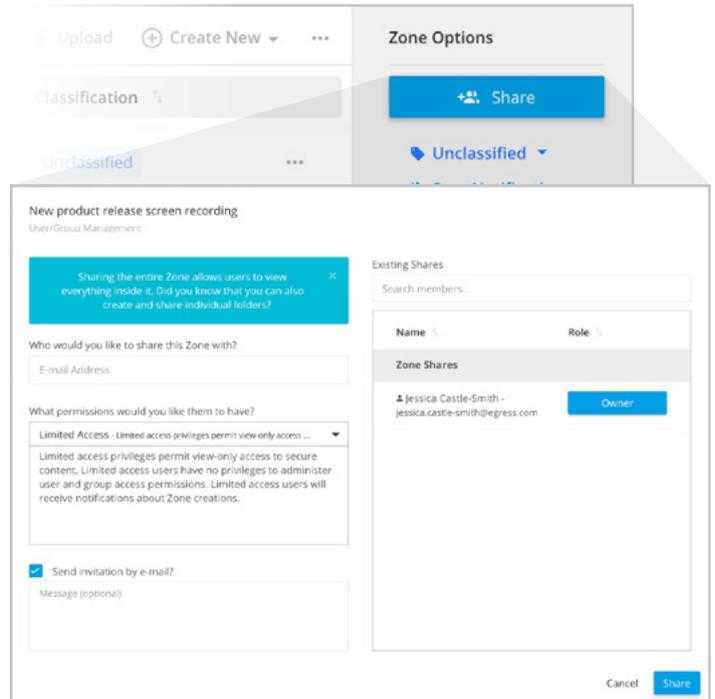
Stage five: Sharing a file

Rather than share access to an entire zone, you may want to share a link to an individual file.

1. Select the share icon next to a file in a zone.

2. Enter the email address(es) of the people you wish to share with.

3. If you wish, choose a custom message and a link expiration date.

4. Use the drop down menu under **Link Permission** to choose the recipients access level.

5. Press **Save** to send the invitation.
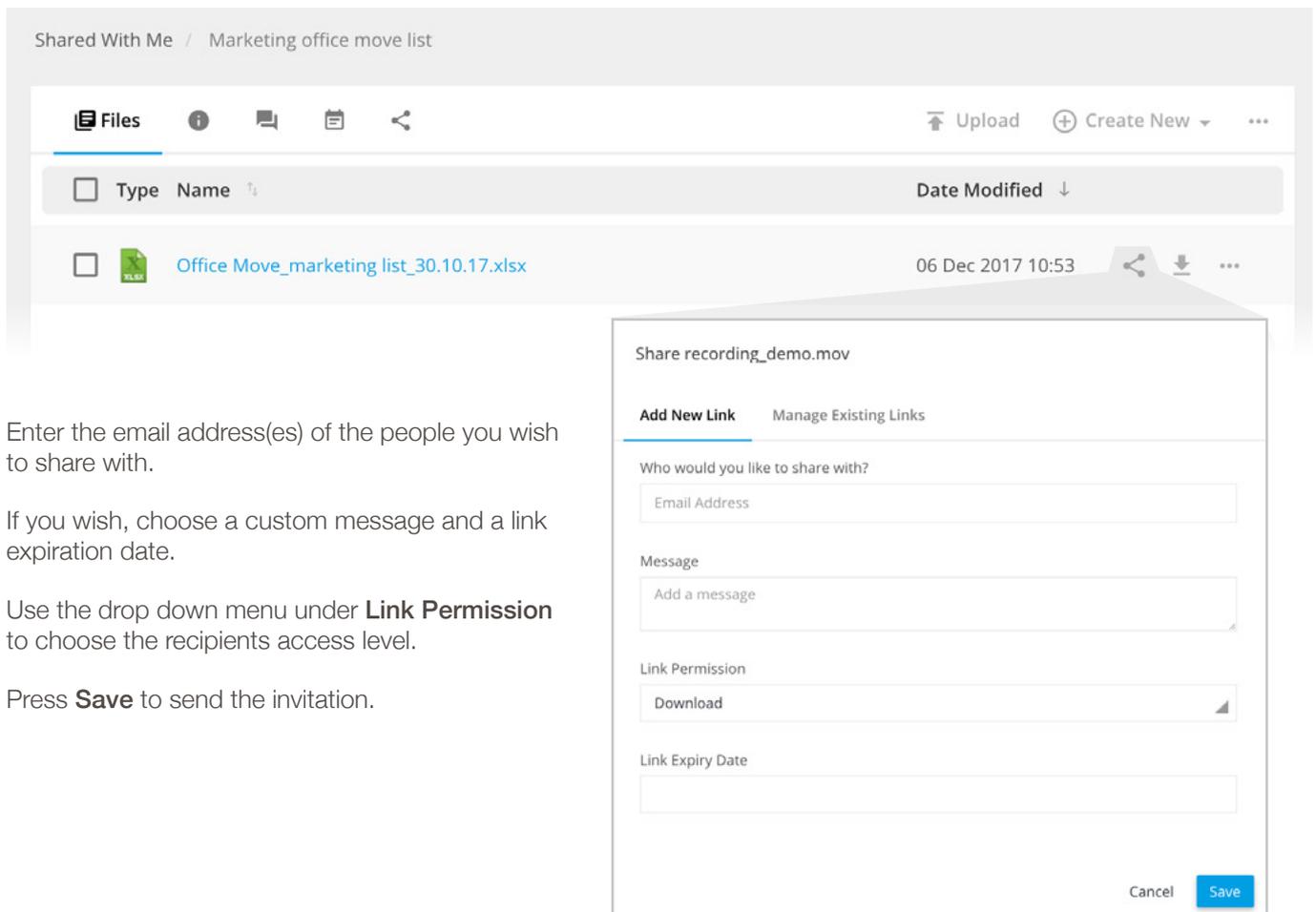
Stage six: Editing a document

Switch Secure Workspace features inline document editing of Microsoft Office documents including real-time updating and tracked changes. Documents can be edited collaboratively or exclusively. To start editing a document:

1. In a zone, select the document you wish to edit. This enters Preview mode.

2. Press the edit button to choose **Exclusive Edit** or **Team Edit**.
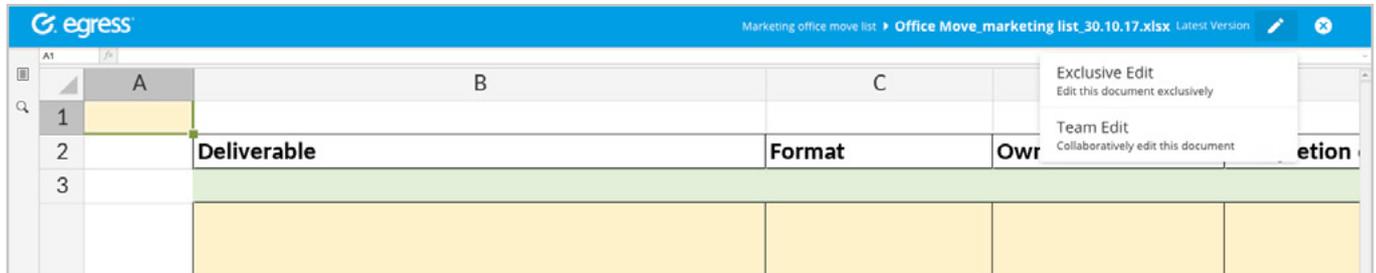
Learn more about Egress Switch

Visit www.egress.com/online-tutorials for video tutorials on using Switch Secure Workspace, including how to:

- Access content
- Share files and folders
- Edit documents and annotate PDFs
- Manage user and group permissions

Technical support

Should you encounter any problems using Switch Secure Workspace or have any technical questions, please contact Egress Support at www.egress.com/support.