



# Administrator quick start guide

In this guide we have outlined some key administrative features to assist you in managing your business account.

## How to invite users

1. Sign in to the Administration Panel - <https://switch.egress.com>
2. Select **Invite Users** on the left hand side of the Administration Panel.

The screenshot shows the Egress Administration Panel. On the left, a navigation menu is visible with the following categories: Account Summary, My account, Sent Packages, Web Access, Business Account, and Policies. The 'Invite Users' option under the 'Business Account' category is highlighted with a grey callout box. The main content area displays a 'Welcome, Jane Doe!' message and account details for 'My Account', 'Business account', and 'Payment Settings'.

3. Select either **Single User** or **Multiple Users**.

4. If adding multiple users, then use the following template:

5. Select **Invite**.

6. The invited user will then receive an activation email to invite the user into the business account:

*It does not matter if the invited user already has a free Egress account.*

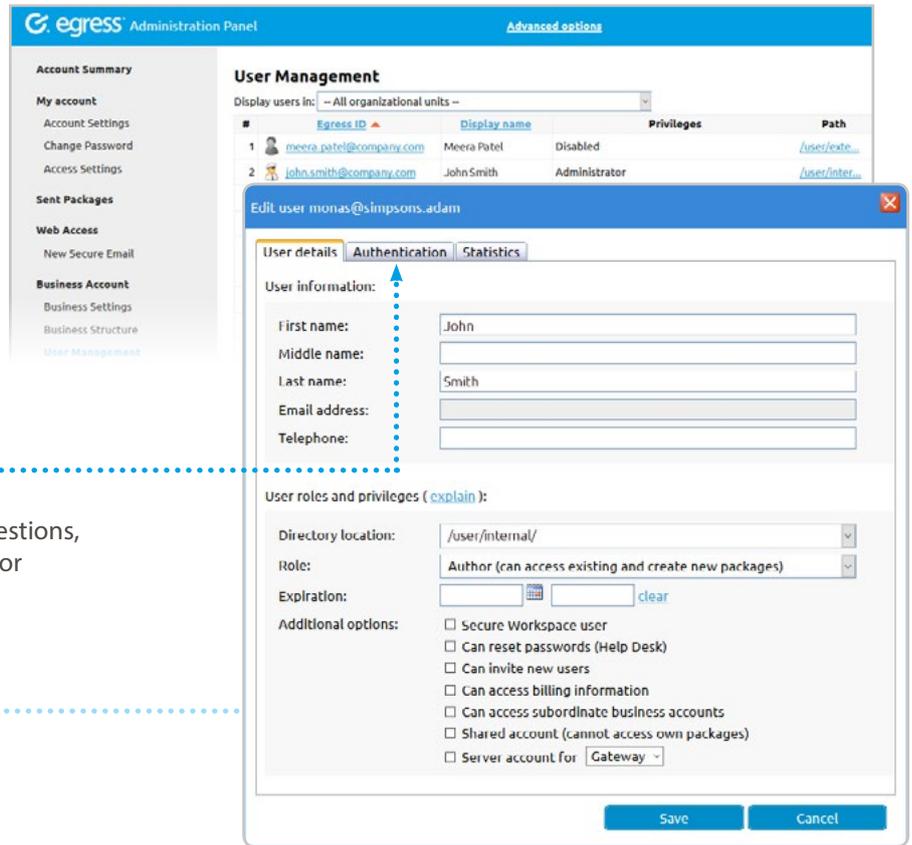
7. Pending invitations of users that have not yet accepted will also be listed on this page.

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D
1	<b>First Name</b>	<b>Middle Name ( leave blank if N/A)</b>	<b>Last Name</b>	<b>Email Address</b>
2	Bob	Andy	Smith	<a href="mailto:bob.smith@egress.com">bob.smith@egress.com</a>
3				
4				
5				
6				
7				
8				
9				

## How to reset a password

1. Sign in to the Administration Panel - <https://switch.egress.com>
2. Select **User Management** on the left hand side of the Administration Panel.
3. Select or search for the Egress ID you wish to reset.
4. Navigate to the **Authentication** tab displayed in the top banner.
5. Here you can: reset the user's security questions, notify the user to create a new password or explicitly set a user's password.
6. Select **Save**.



### User management

The main roles within Egress are:

- Administrator
- Author (standard user)
- Limited author (free user)
- Other roles are also configurable

You can find out more information about the various roles by visiting:

<https://supportcentre.egress.com/hc/en-gb/articles/203170511-Can-I-define-role-based-privileges->

## How to purchase additional licences

1. Sign in to the Administration Panel - <https://switch.egress.com>
2. Select **Purchase Add Ons** in the middle of the home screen.
3. Select the products you wish to purchase.
4. Complete the payment purchase.

## Learn more about Egress

Visit [www.egress.com/online-tutorials](http://www.egress.com/online-tutorials) for video tutorials on using Secure Email and File Transfer, including how to:

- Access a secure message
- Manage your messages and control access to them in real time
- Send large files securely
- Approve or deny access requests to secure messages

## Technical support

Should you encounter any problems using Secure Email and File Transfer or have any technical questions, please get in touch with your Egress Technical Engineer or contact Egress Support at [www.egress.com/support](http://www.egress.com/support).



© Egress Software Technologies Ltd 2018. 673-0419