



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 and items:

- Account Summary**
- My account**
 - Account Settings
 - Change Password
 - Access Settings
- Sent Packages**
- Web Access**
 - New Secure Email
- Business Account**
 - Business Settings
 - Business Structure
 - User Management
 - Invite Users** (highlighted with a callout box)
 - SSO Configuration
 - Audit log
 - Reporting
- Policies**
 - Passwords

The main content area displays a 'Welcome, Jane Doe!' message and three sections:

- My Account:** Egress ID: jane.doe@company.com, Display name: Jane Doe, Account type: Business, Roles: Administrator, Billing manager, Previous sign-in: 24 Oct 2018 10:11 AM. Buttons: Account Settings, Change Password.
- Business account:** Company name: Company Inc., Company ID: SDX-001037, Support contact: Support for Company (support@company.com), tel: +1 800 777 1234. Button: Change Settings.
- Payment Settings:** Account type: Business, Secure Email with Switch Gateway: 100000 Licenses.

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.

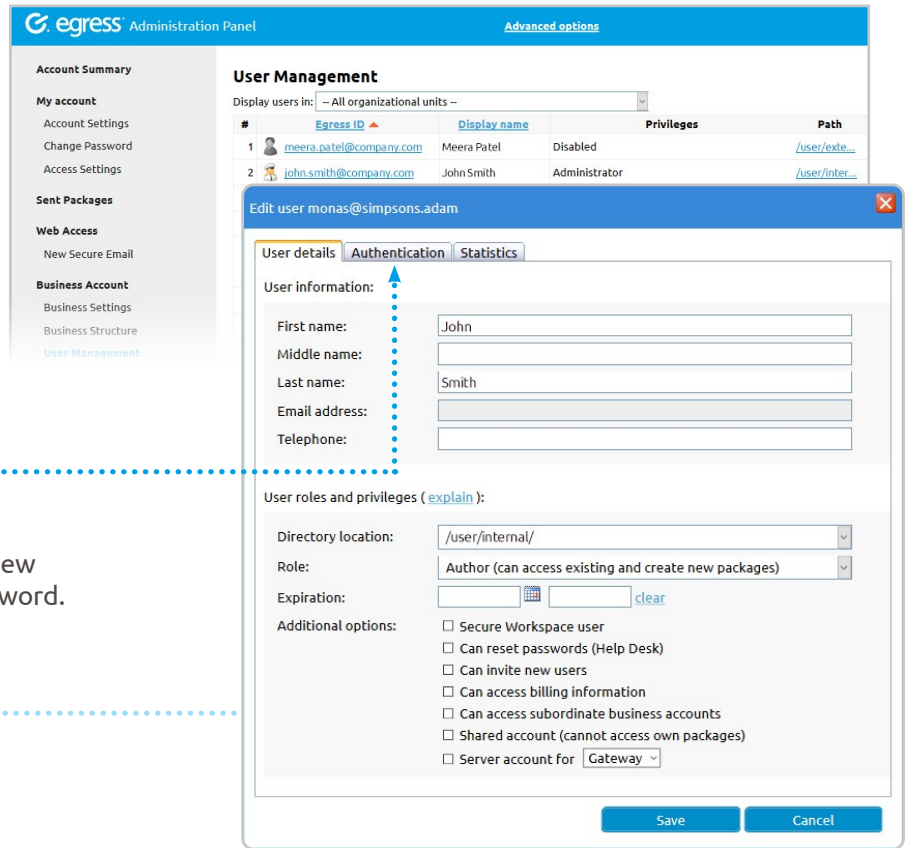
7. Pending invitations of users that have not yet accepted will also be listed on this page.

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

	A	B	C	D
1	First Name	Middle Name (leave blank if N/A)	Last Name	Email Address
2	Bob	Andy	Smith	bob.smith@egress.com
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 for video tutorials on using Egress Protect, 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 Egress Protect or have any technical questions, please get in touch with your Egress Technical Engineer or contact Egress Support at www.egress.com/support.

www.egress.com | info@egress.com | 0844 800 0172 | [@EgressSoftware](https://twitter.com/EgressSoftware)