

# Egress Switch Administration Panel

## User Guide

July 2015

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## Introduction

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

## Creating a business structure

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

1. Sign in to your Switch 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.

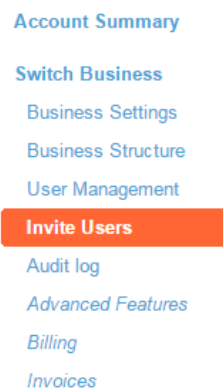
Please define organization structure of your business account below:

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	

## 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.

- On the left-hand pane, select **Invite Users**.



*Note: To learn how to enable ADFS, please see the Egress Switch ADFS Configuration Guide.*

### Invite a single user

1. Select **Invite Single User** and complete the required fields of the invitation form.
  2. Specify the directory location to which the user is being invited.
  3. Assign the user a role, for example **Author** or **Limited User**. Limited users will not take up an active license, so will have read-only rights.
- You can leave the password boxes blank so that the user can create their own password.
  - You can also add a personalised note to the invitation email, for example linking to your intranet site where further documentation about Switch is available.

**Invite a single user** ✕

Please specify details of the user you wish to invite below. Leave email address blank to preview the invitation email.

First name:\*

Middle name:

Last name:\*

Email address:\*

Directory location:

Role:

If you leave the password field blank the user will be asked to enter their own password and answer password reset security questions.

Password:

Confirm password:

Minimum 8 characters, with at 1 lower case and UPPER case / number

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

Note:

Send email now

4. Confirm the invitation by pressing **Invite**. Upon returning to the **Invite Users** page, you will see the invitation under **Pending Invitations**. Once the user has followed the link and set up their account, the invitation is cleared from this section.
  - Reminders are automatically sent out once a week if the user has not activated their account. After one month, the invitation will expire and will need to be resent.

**Pending invitations**

#	<a href="#">Switch ID</a>	<a href="#">User name</a>	<a href="#">Last email at</a>	<a href="#">Expires at</a>	<a href="#">Role</a>	
1 <input checked="" type="checkbox"/>	inviteuser@egress.com	John Smith	31 Mar 2014 09:44	30 Apr 2014 09:44	Author	

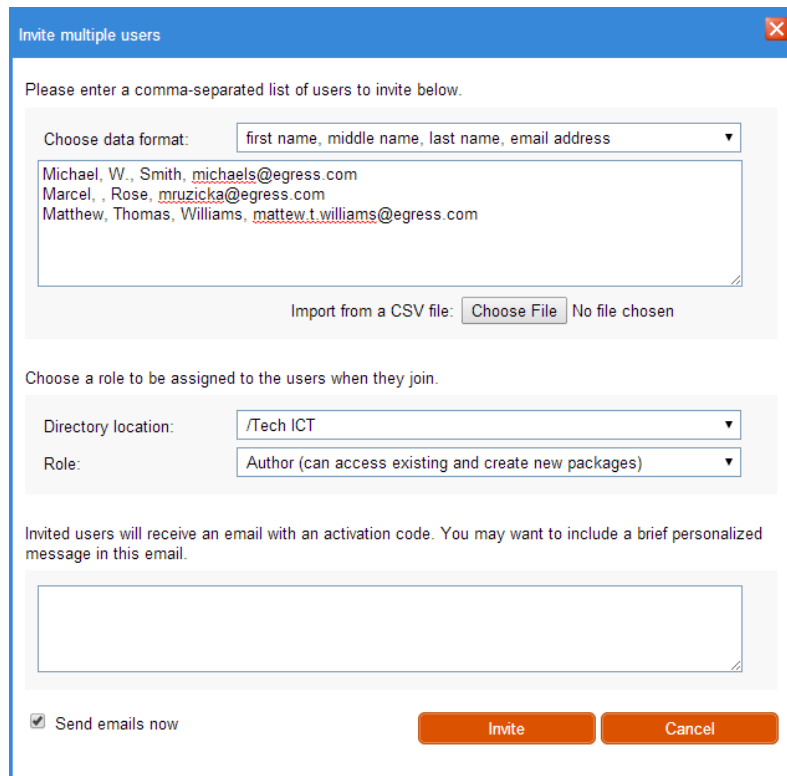
Ctrl

Go to:  Show rows: 15  1 - 1 of 1

[Download as CSV](#)

## Invite multiple users

1. Select **Invite Users** then click **Invite Multiple Users**.
2. Enter the details of the users you wish to invite. Make sure you separate each value with a comma.



Invite multiple users

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

Choose data format: first name, middle name, last name, email address

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: Choose File No file chosen

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

Directory location: /Tech ICT

Role: Author (can access existing and create new packages)

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

Invite Cancel

3. Here you can add multiple users simultaneously by importing a CSV file. The default format for this file is: *first name, middle name, last name and email address*. The CSV data is parsed and displayed in the box provided.

*Note: the middle name field can be left blank and comma separated, e.g. John, , Smith, johnsmith@egress.com.*

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



## Automatic account creation

When your Switch 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](#)

## Password complexity

When you send an invitation email and the user sets up a Switch 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.

- Select **Passwords** from the left-hand menu. Here you can change the complexity requirements and modify the list of security questions available for users to choose from when setting up their account. You can also set the number of questions users are required to answer.

## Passwords

Specify password policy requirements:

Min. password length:	<input type="text" value="8"/>
Additional options:	<input checked="" type="checkbox"/> Require lowercase characters <input type="checkbox"/> Require uppercase characters <input type="checkbox"/> Require numeric characters <input checked="" type="checkbox"/> Require upper case OR numeric characters <input type="checkbox"/> Require special characters
Note to users:	<input type="text" value="Minimum 8 characters, with at 1 lower case and UPPER case / numt"/>

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:	<input type="text" value="What high school did you attend?"/> <input type="text" value="In what city do you work?"/> <input type="text" value="What is your mother's maiden name?"/> <input type="text" value="Where were you born?"/> <input type="text" value="What was the name of your first friend?"/> <input type="text" value="What was the surname of your favourite teacher?"/> <input type="text" value="What was the name of your first pet?"/> <input type="text" value="What was the surname of your first boss?"/> <input type="text" value="What make was your first car?"/> <input type="text" value="What was your worst subject at school?"/> <input type="text" value="What is your father's middle name?"/> <input type="text" value="What is the name of your eldest cousin?"/> <input type="text" value="Where was your least favourite job?"/> <input type="text" value="Where did you go for your first holiday?"/> <input type="text" value="What is the first name of your favourite aunt?"/>
Questions to answer:	<input type="text" value="2 (recommended)"/> <input checked="" type="checkbox"/> Show questions in random order

## User management

User management enables you to view and manage all users within your business account. Common functions include resetting user passwords, updating user details or viewing user statistics.

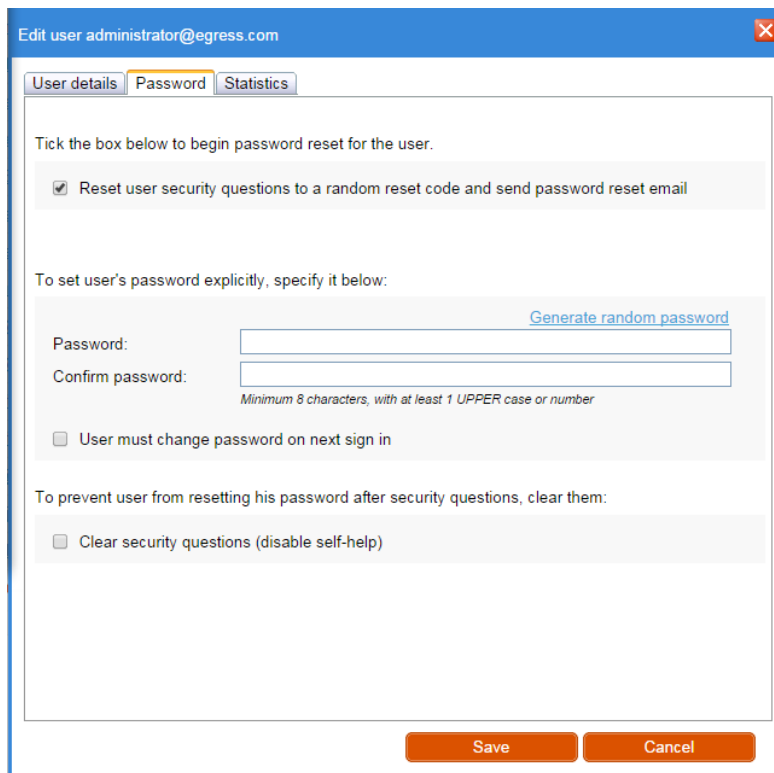
### Password resets

Users in your business account can reset their own passwords if they remember the answers to the security questions they provided when creating their Switch account.

- They can do this by visiting <https://switch.egress.com> and selecting **Forgot Your Password**.

If, however, the user does not remember their security answers, then a business administrator or help-desk staff member can reset it for them.

- Click on the relevant user within the **User Management** panel and select the **Password** tab.



Here you can either reset the user's security questions to a reset code and send the code in an email, or explicitly create a new password for them.

It is advisable to reset the user's security questions and send a reset email so that they can choose a new password and new answers to security questions.

- Select the relevant tick box and press **Save** to display a reset code.

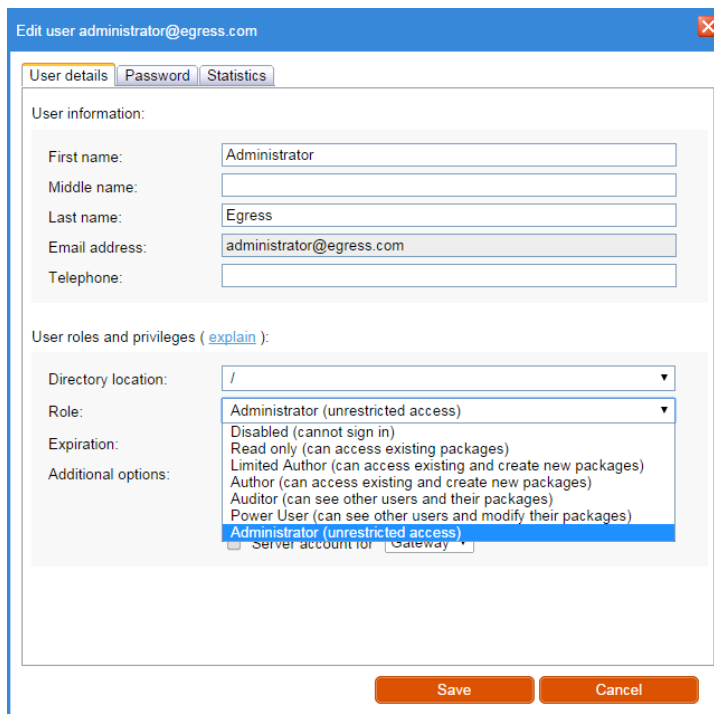
Account **administrator@egress.com** has been updated successfully. Password reset has been initiated. Reset code: **55AAE5**

The user will receive an email with a web link to follow. Upon following the link they will be prompted to enter the reset code and reset both their password and security answers.

## Roles and permissions

User roles are applied during the invitation process but you may wish to update them at a later date.

- Select the relevant user within the **User Management** panel and choose the appropriate role from the drop-down menu in the **User details** tab.



## 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 Switch Client. First-time users are given a number of credits for free, so every user that signs up for a Switch ID is automatically an Author until these credits are used. Authors in a Switch Business Account can create and share unlimited packages.
- **Auditor** — The user can create and share Switch Packages. They can view packages created by another Switch user account listed in the same organisation.
- **Power User** — The users can create and share Switch packages. They can view and modify packages created by any other Switch user account listed in the same organisation.
- **Administrator** — The user has full unrestricted access to Switch packages and users listed under the same organisation. A Switch 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 Billing Information** – The user can access payment plans and billing history.
- **Can Access Subordinate Business Accounts** – The user can access and change the settings of any business accounts linked to their own.











## Data exchange

Using the Switch 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.

### Data Exchange

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

Display policy assigned to: /

<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 checked="" type="checkbox"/>  <b>Internet server</b> Create and manage your own FTP and HTTP connection bookmarks
<input type="checkbox"/>  <b>PriCloud</b> Upload to private cloud	<input type="checkbox"/>  <b>New Server</b> Create a new server

Simply tick the relevant options and press **Save** to apply the changes.

*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.*

## Switch support centre

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

### Useful contact information:

Egress Europe:	+44-844-8000-172
Egress North America:	1-888-505-8318
Egress Australia:	1-800-768-043
Egress Singapore:	800-130-2208

Egress Website Address:	<a href="http://www.egress.com">http://www.egress.com</a>
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Egress Sales:	<a href="mailto:sales@egress.com">sales@egress.com</a>
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Account Services:	<a href="mailto:accountservices@egress.com">accountservices@egress.com</a>
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Support:	<a href="mailto:support@egress.com">support@egress.com</a>
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