Egress

# Secure Workspace
## User Guide

## https://collaborate.actuaries.org.uk

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# Contents

# Egress Switch Secure Workspace
# User 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. It ensures that data is kept secure both at rest and in transit, integrates seamlessly with existing document management systems, and does all of this while maintaining Switch's award-winning ease of use.

Switch Secure Workspace makes managing complex projects easier and more efficient, bringing together file sharing, online document editing and messaging functionality and enabling multiple stakeholders to organise workflow and stay on track. Fine-grained control of user permissions and extensive auditing features mean that administrators retain full control of their files and folders, even while sharing with and external partners.

This user guide explains how to share files and collaborate on projects using Switch Secure Workspace.

# Getting started

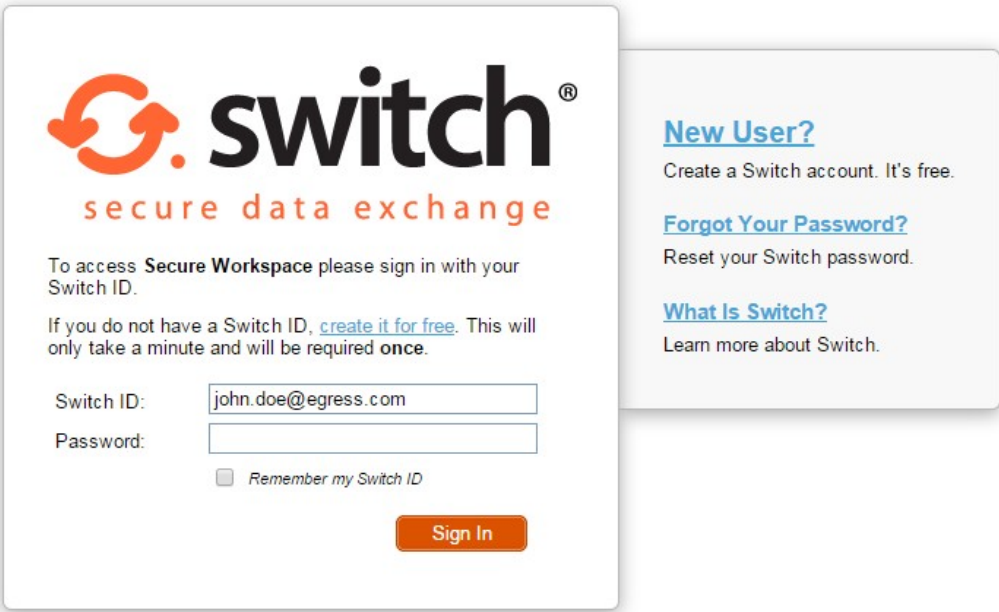Switch Secure Workspace requires sign-in using a Switch ID.

## Signing in to Switch Secure Workspace

**New Users**

When someone shares a zone, file or folder with you or invites you via email to join a zone, you will be prompted to create a Switch ID at the Switch sign-in screen. Select **New User?** to create an account.

**Existing Users**

Access Switch Secure Workspace by going straight to the zone webpage, which will be of the form: example.egresscloud.com. Alternatively, another user might share a zone by emailing a web link, in which case simply follow the link and sign in. Egress Switch supports single-sign-on so it may be possible to sign in using your usual system username and password. Once signed in with your Switch ID, you arrive at the Switch Secure Workspace dashboard.



Users are assigned a **user role** in Switch Secure Workspace, which defines the actions they are permitted to perform. These user roles are split into **System Roles** and **Zone Roles**. System roles define the core system permissions users have, such as whether they have access to administration and auditing tools. Zone roles define the capabilities users have on a per-zone basis, for example the ability to create and delete files and folders. For more details on user roles please see the User roles section of this guide.

## Using Switch Secure Workspace for the first time

On first arriving at Switch Secure Workspace you can start creating zones and sharing with users straight away. The basic steps involved to start sharing and collaborating are:

1. Join a zone
2. Add files to the zone
3. Share zones, files and folders with other users
4. View and edit files
5. Collaborate

Not all user roles are able to perform all of these steps but all roles allow joining a zone and viewing its files.

## Using the dashboard and sidebar

The dashboard is displayed upon signing in to Switch Secure Workspace. On the dashboard find recent activity and account information.

Return to the dashboard at any time by selecting the **Egress** logo on the top toolbar. The navigation sidebar contains all the tools required to create and access zones.
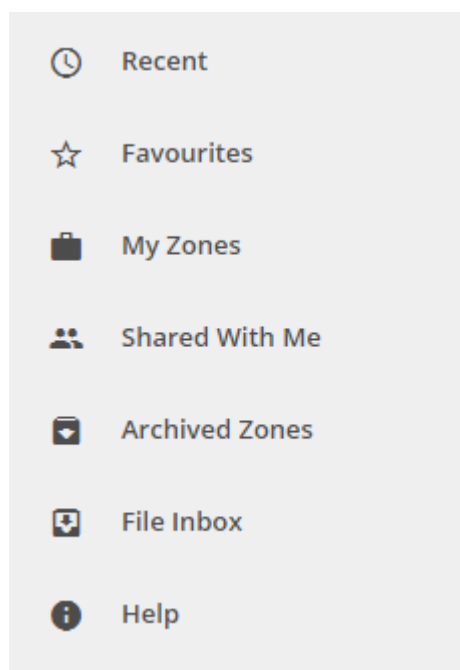
| | |
|---|---|
| (clock) Recent | **Recent -** view a list of recent zones you have accessed. |
| ☆ Favourites | **Favourites -** view a list of favourited zones. |
| 💼 My Zones | **My Zones -** access your zones and create a new zone. |
| 👥 Shared With Me | **Shared With Me -** view zones that have been shared with you |
| 📥 Archived Zones | **Archived Zones -** view a list of archived zones. |
| 📥 File Inbox | **File Inbox -** stores files that are emailed to your account. See the File Inbox section for more details. |
| ❶ Help | **Help -** view support documents and information about Switch Secure Workspace. |

## The user panel

Select the user icon on the top right of the toolbar to access the user panel, which contains the following options:

- o Manage Switch Secure Workspace preferences
- o Go to your Switch account page at http://switch.egress.com/
- o Sign out of Switch Secure Workspace
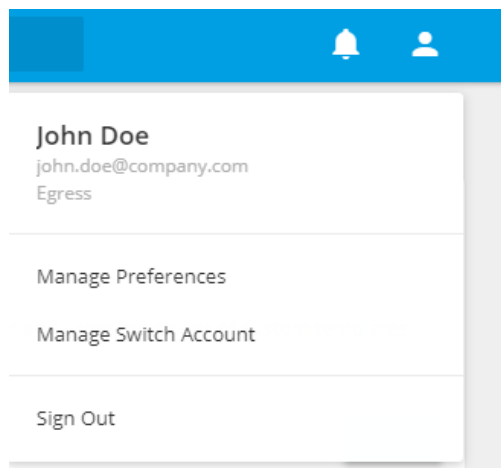
Use the notification icon to view and manage access requests to your zone. See Reviewing pending access requests section for more details.



## User roles

The business account administrator assigns users in their account a specific user role when registering them or inviting them to a shared zone. This role determines the actions which they are allowed perform on Switch Secure Workspace. Depending on a user's assigned role, they may not be able to perform all of the actions described in this user guide.

There are **System Roles** and **Zone Roles**. System roles define the core system permissions a user has, such as whether they have access to administration and auditing tools. Zone roles define the capabilities a user has on a per-zone basis. For example, a user may be a **Guest User** in the overall system, but may have an **Administrator** role in a particular zone. They would not be able to create zones or perform other administrative or auditing functions but would have full control over the functionality of the specific zone they administrate. If you have an **Administrator** system role, please see the *Switch Secure Workspace Administration Guide* for details on how to use the administrative and auditing functions in Switch Secure Workspace.

View your system role on the zone dashboard in the **My Account** section.

View your zone role by going to a zone and looking at the **Zone Permissions** section to see the role under which you are listed.
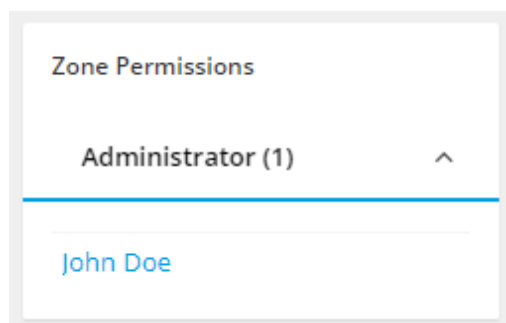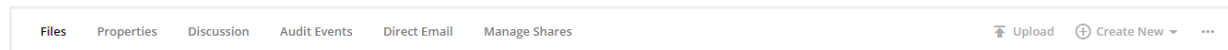
# Zones

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

## Zone options

All zones have a toolbar containing various option tabs:



**Files -** display a list of the files and folders currently in the zone.

**Properties -** edit the zone title, description and classification level (if you have permission).

**Discussion -** a simple messaging system for discussing projects. Can be enabled or disabled.

**Audit Events -** view the events history of the zone. Every action that occurs in the zone, such as the creation or deletion of files, is recorded here.
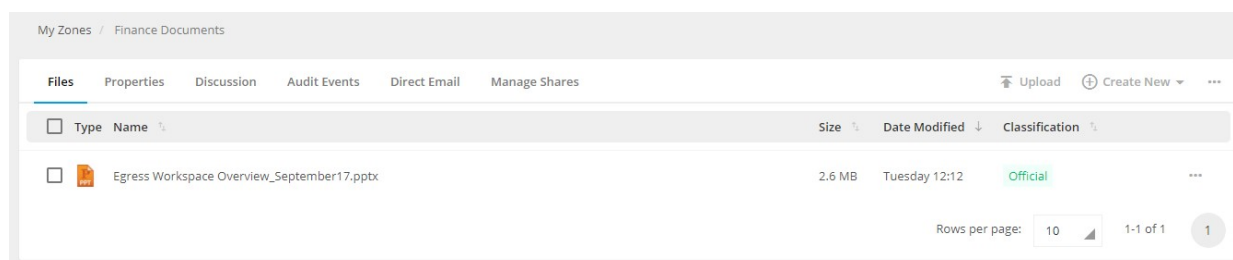
**Direct Email -** set up an inbound email address to remotely add files to the zone. See Emailing files into a zone for further details.

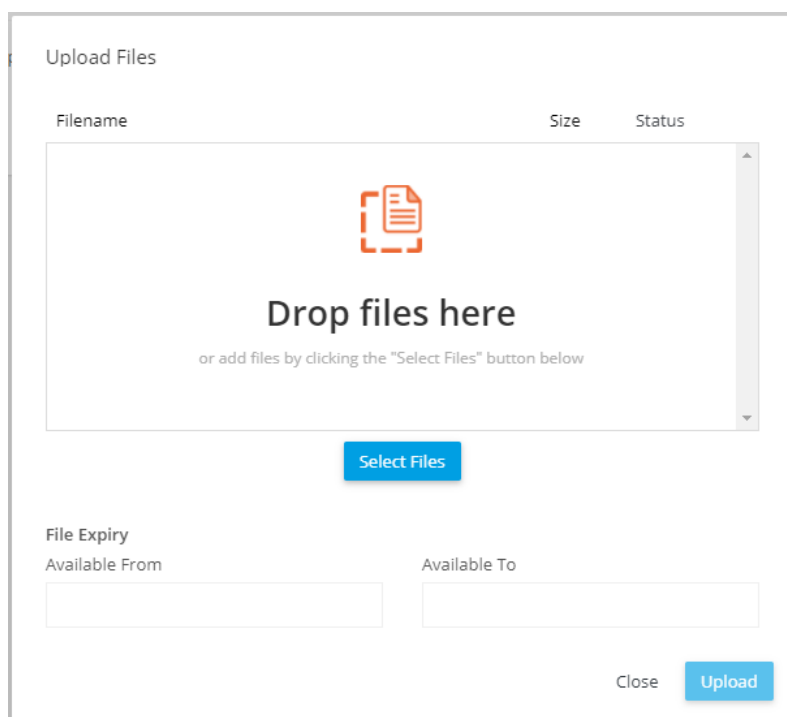**Manage Shares -** view and manage shared folders in the zone.

*Note: Some of these options may not be available, depending on the user role you have been assigned by the business account administrator. Direct Email is also an optional feature and so may not be available.*

# Uploading 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.

2. Press the **Upload** button. Alternatively, press the **More** button and select **Upload Archives** if you are uploading an archive file.

| My Zones / Finance Documents | | | | | | |
|---|---|---|---|---|---|---|
| **Files** Properties Discussion Audit Events Direct Email Manage Shares | | | | ⬆ Upload | ⊕ Create New ▾ | ⋯ |
| ☐ Type Name ↑↓ | | | Size ↑↓ | Date Modified ↓ | Classification ↑↓ | |
| ☐ 📄 Egress Workspace Overview_September17.pptx | | | 2.6 MB | Tuesday 12:12 | Official | ⋯ |
| | | | | Rows per page: 10 ◢ | 1-1 of 1 | 1 |

3. Press **Select Files** to browse for files, or simply drag and drop them into the window.

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**

4. Set time restrictions on the files if you wish by using the drop-down menus under **File Expiry** to choose dates and times for file availability and expiry. See Setting file expiry dates for more details.

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

Your Switch Secure Workspace administrator may have put file restrictions in place to prevent users uploading certain file format.

# Setting file expiry dates

When you upload a file or an [archive](#) to Switch Secure Workspace, you can set file availability and expiry dates. The files will only be accessible to zone users between the two dates chosen.

**File Expiry**
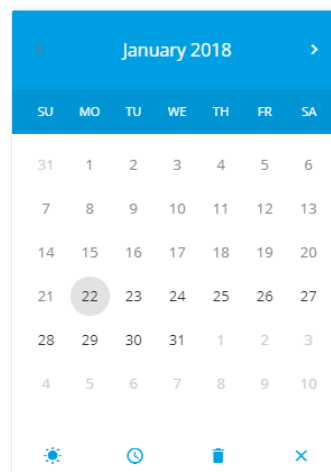
| Available From | Available To |
|---|---|
| 22-01-2018 09:00 | 29-01-2018 00:01 |

- Change a file's availability dates at any time by selecting the **More** icon next to the file in question and choosing **Properties**. Alter the availability and expiration dates and then press **Save** to confirm. Expired files still appear in the zone, but they will be greyed out and unavailable for viewing and editing.

| | Size | Date Modified ↓ | Classification |
|---|---|---|---|
| Expired 22 January 2018 16:40 | | | |
| 🕑 | 4.9 MB | Today 16:44 | Official |

- To make an expired file available again simply go to the file **Properties** menu again and set the expiry date to a future date, or clear the expiry date field completely by pressing the waste bin icon. Press **Save** to confirm.

|  | January 2018 | > |
|---|---|---|
| SU | MO | TU | WE | TH | FR | SA |

| SU | MO | TU | WE | TH | FR | SA |
|---|---|---|---|---|---|---|
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |

- You can delete all of the expired files in a zone simultaneously by going to **Delete Expired Files**. Confirm the deletion using the message box that appears.

**Zone Options**

**Share**

🏷 Official ▾

Stop Notifications

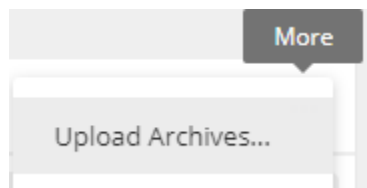Archive Zone

Delete Expired Files
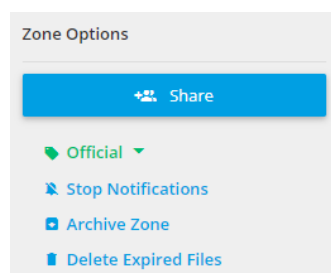
# Uploading archives

It is easy to upload archive files to a zone. The archives can be in .zip, tar.gz or .switch format, and will extract into the zone when uploaded, providing an easy method for uploading lots of files at the same time.

To upload an archive:

1.  In the zone you wish to upload the archive file into, select the **More** icon and choose **Upload Archives.**



*Note: selecting Upload Information here displays a list of the file types allowed in this specific zone.*

2.  Select the archive files you wish to upload in the same way you would upload a normal file. Drag and drop the file or press **Select Files** and choose them from the file menu.

3.  Set the **File Expiry** dates for the extracted archive files. You can choose the date and time when the files become available to other users, and when this access expires.

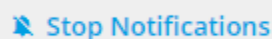4.  Press **Archive upload information** to display a list of supported archive file types.



5.  Press **Upload** to upload the archive. The files should extract into the zone and be available for editing, sharing and downloading. Please note this process may take some time for large archives.

# Watching a zone

As a user you can configure whether you would like to receive event notifications for a particular zone you have access to. The type of events you can be notified are configurable by a system administrator but includes things like, file upload/download, sharing files etc.
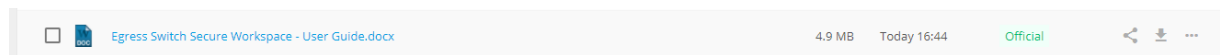
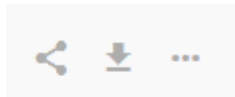•   To toggle notifications on or off use the Notifications button in the **Zone Options** sidebar.

# Managing files and folders

When added to a zone files appear in the file list, displaying the following details:

**File name, file size, classification and date of last modification.**

| ☐ 📄 Egress Switch Secure Workspace - User Guide.docx | 4.9 MB | Today 16:44 | Official | ≺ ⬇ ⋯ |
|---|---|---|---|---|

There are also file options icons next to each file:

Use these icons to:

≺     Share a link to the file

⬇     Download the file

⋯     Find more file options

Press the **Options** icon to see the following options list:

- **Preview -** open the file viewer to preview the file.

- **Lock -** prevent the file being accessed and edited by other users.

- **Exclusive Edit -** edit the document exclusively. Document will be locked while you are editing.

- **Team Edit -** edit the document in collaboration with other users.

- **Move -** Move the file to another folder within the current zone, or to a different zone entirely.

- **Copy -** make a copy of the file in the same zone or in a different zone.

- **Rename -** Change the file name.

- **Delete -** Delete the file.

- **Properties -** View file properties.


If the file is a PDF document, you will see the following options:

- **Public Annotate -** add annotations to the document visible to others.

- **Private Annotate -** add annotations visible only to you.

# Creating folders

In a zone, press the **Create New** button and select **New Folder** in the drop-down to create a folder. Give the folder a name in the **New Folder** message box. Place files in the new folder by selecting the tick boxes next to the required files, then using the **Options** icon to choose **Move Selected** and choose the new folder.

# Moving files

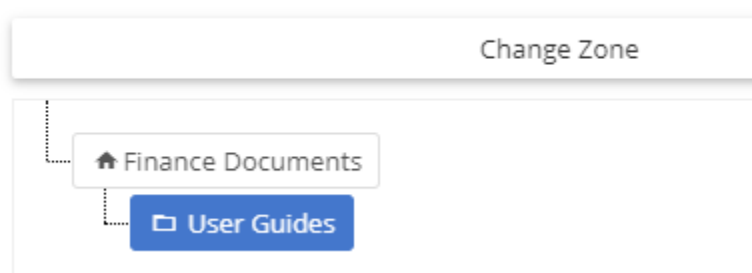1. To move one or more files to a folder, check the tick boxes next to each file you wish to move.



2. Press the **Options** icon..
3. To move the selected files, press **Move Selected.** Alternatively, delete them by pressing **Delete Selected.**
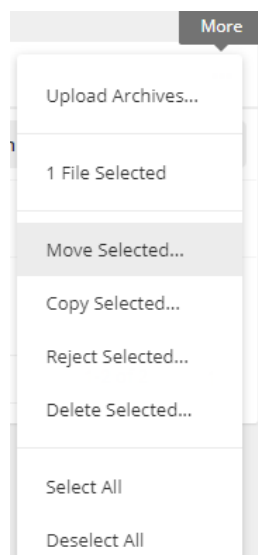


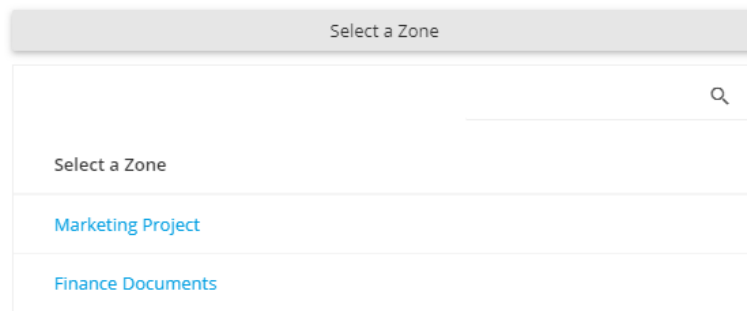4. In the **Move File** menu, choose the desired folder location.



5. Press **Move.**

**Note:** You can move files and folders between different zones. To do this:

1.  Click on the current zone at the top of the **Move File** menu.



2.  This brings up a list of accessible zones, either user-owned or zones that have been shared.

3.  Choose the zone in which to move the files and/or folders and press **Move.**

4.  In the next menu, choose a folder location within that zone then press **Move** again.

# Creating documents within a zone

Switch Secure Workspace features the ability to create Microsoft Office-compatible text documents, spreadsheets and presentations from scratch within a zone, as well as upload existing documents.

To create a new document within a zone:

1.  Press **Create New** and on the drop-down menu choose the type of document to create, either **Word Document, Excel Spreadsheet** or **PowerPoint Presentation.**
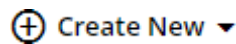
$$\oplus \text{ Create New } \blacktriangledown$$

2.  In the message box that appears, give the new document a name and choose its file extension. Each document type supports various file types

3.  Press **Create**. The new document will appear in the zone's file list and will automatically open in Team Edit mode so that you can start working on the document straightaway.

*Note: After closing the editing session of a document for the first time after creating it, it will be version 1 rather than 2.*

# Sharing zones
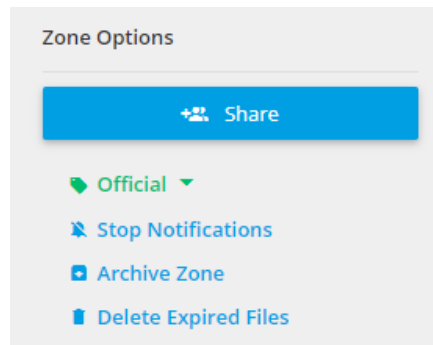


To share a zone with other users, press the **Share** button on the right-hand side of the zone. This opens the share dialog box, where you can add new users to the zone.

To share with one or more new users simply:

1. Press **Share** to open the share dialog box.

2. Type in the user's email address(es) if they are a new user and press enter to add them to the share list. Select their name from the drop-down menu if they are an existing user. You can also choose a user group here to share with multiple users at once.



3. Select the permissions to grant them.

4. Select whether they should receive an invitation email, with an optional message.

5. Press **Share**.

6. Rather than send an email invitation, you can also copy the URL link of the zone and paste it into an email or message to the invited users. This is useful if you wish to set up the zone ahead of time and then invite users at a later date.

New users are automatically granted access to the zone. It does not matter if they do not have a Switch account since they will be prompted to sign up when they are invited. The users which have access to the zone are listed under the **Share** button on the right-hand side of the page, under their corresponding zone role.

Amend or revoke zone permissions by pressing **Share,** then going to the **Existing Shares** section and clicking the cross or changing the access level next to the specific user's entry. Removing a user prevents any further access to the zone.
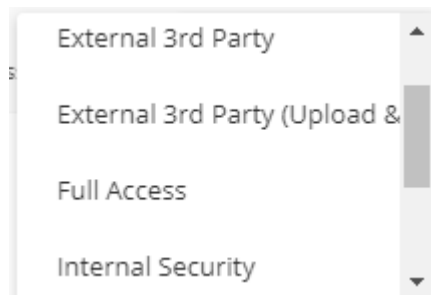
# Sharing a file

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 users to share with.

3. Choose a custom message (optional).

4. Use the drop-down menu under **Link Permission** to choose whether the recipient can view and download the file, or only view it.

5. Set a link expiry date to make user access temporary (optional).

6. Press **Save Changes** to send the invitation.
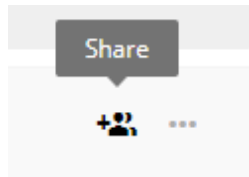
# Sharing folders

1. To share a folder within a zone, press the **Share** icon next to the folder.



2. Type in the name of the user(s) you want to share with, or search for them using the drop-down menu.
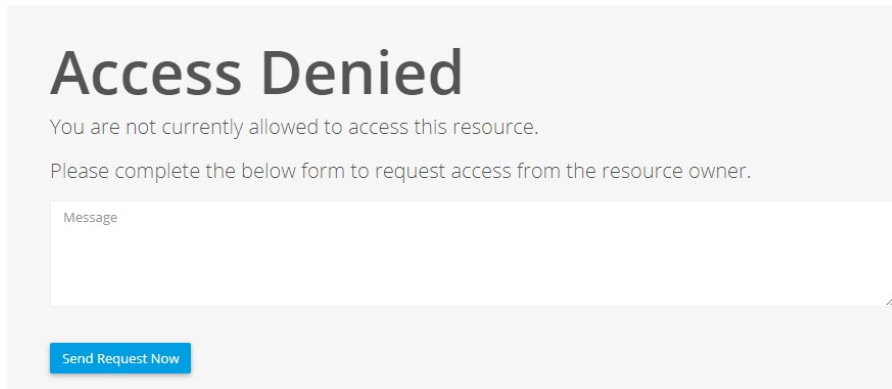


3. Choose the permissions level you wish to assign

4. Choose to send an optional

5. Select whether they should receive an invitation email, with an optional message.

6. Press **Share**.

7. To change folder shares at any time, go to the **Manage Shares** tab in the zone. The menu here lets you view and manage shared folders in this zone, also providing the ability to toggle between folder view and user view.

# Sending zone access requests

If a user follows a URL link to a zone without previously being invited to it they see an access denied page. Users can request access to zones which they do not yet have permission to view by filling out the message box on the access denied page and pressing **Send Request Now**. The zone owner receives the access request.



If a user requests access to one of your zones, you will see a notification by the user panel icon.

Select the notification icon and use the dropdown arrow to choose the zone for which you wish to review the request. Use the **Response** dropdown menu to either approve or deny the request.

# Revoking access to a zone

It is easy to revoke a user's access to a zone, though this capability is only available to users assigned the **Administrator** role. Most roles, like **Guest Users**, cannot change other users' permissions. To revoke access:

1.  Go to the zone to which you wish to revoke access.

2.  Under the **Share** button there is a list of users and groups with access to the zone, organised by role.
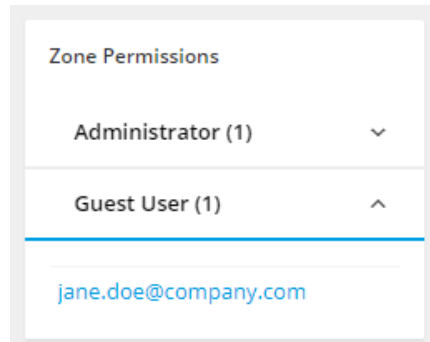


3.  Select the user or group whose access you want to revoke.

4.  In the **Existing Shares** dialog box use the drop down menu to choose **Revoke Access**. It is also possible to change the user's role here, rather than revoke access outright.
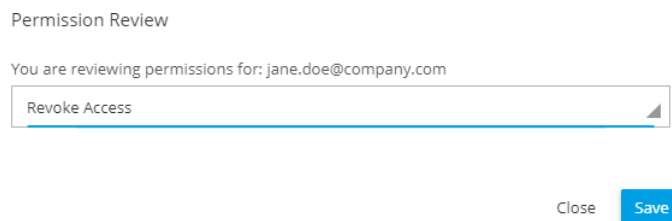


5.  Press **Save** to confirm the changes.

# Previewing files

Switch Secure Workspace features an inline document viewer, which supports the following file types:

| Document Conversion/Preview Supported File Types | |
|---|---|
| Documents | .doc, .docx, .pdf, .odt, .ods, .odp, .ppt, .pptx, .txt, .rtf, .vsd, .vsdx, .csv, .epub, mobi, .msg |
| Images | .png, .jpg, .jpeg, .gif, .bmp |
| Audio | .mp3, .ogg, .wav |
| Video | .webm, .mpeg, .mp4, .ogv |

Click on a file name to view a file in the document viewer. Alternatively, choose **Preview** from the file options menu. The viewer opens in a new tab.
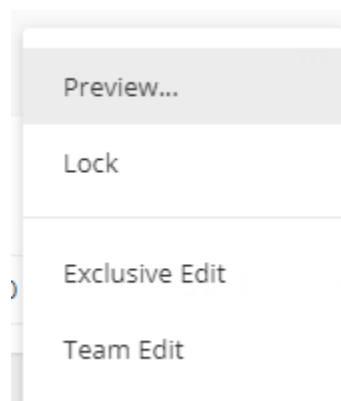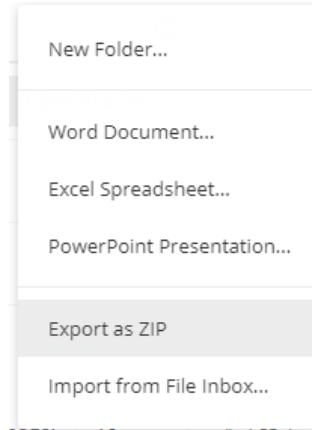


*Note:* The ability to view certain media types depends on browser, operating system and the availability of browser plugins.

# Exporting files

Switch Secure Workspace lets you export files in a zone as a zip file:

- In the zone you wish to export, press **New - Export as ZIP**. A notification appears telling you that you will receive an email when the zip file has finished generating.

New Folder...

Word Document...

Excel Spreadsheet...

PowerPoint Presentation...

Export as ZIP

Import from File Inbox...

# Editing and Collaborating

Switch Secure Workspace features online, real-time document editing of Microsoft Office documents, enabling you to work on documents within a zone together with other users.

There are two edit modes: **Team Edit** and **Exclusive Edit:**

- **Team Edit** enables inline collaboration with other users and includes real-time updating and track changes. You can view who is online in real-time and receive notifications of all team changes.

- **Exclusive Edit** prevents multiple users editing at the same time so when one person starts editing a document exclusively, other collaborators are locked out or only permitted to view. Some default zone roles do not allow the ability to exclusively edit a document.

## Online document editing

When you open a document for editing, there are two document editors available:

**Egress Online Editor -** The feature-rich document editor included with all Switch Secure Workspace subscriptions

**Microsoft Office Online -** browser-based versions of the Microsoft Office apps: Word, Excel and PowerPoint.

Note: a valid Office 365 for Business subscription is required to use Office Online

1.  Choose the editor you wish to use and mark the checkbox if you wish to use the same editor in future editing sessions.

2.  Press **View.**

View document with

( ● ) **Egress Online Editor**
Included with your Egress account.

( ○ ) **Microsoft Office Online**
You must have a valid Office 365 for Business subscription to edit files.
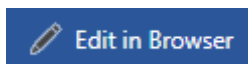
[ ] **Remember my selection**
You can change your settings any time in Workspace Preferences.
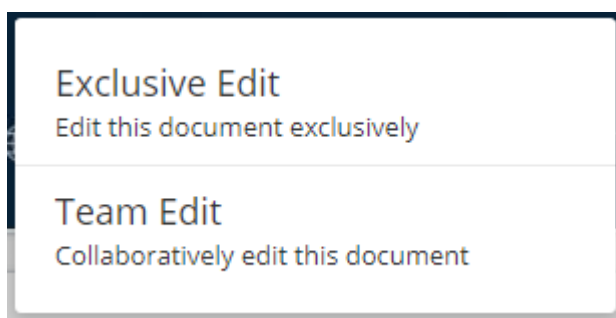
Cancel    View

# Using Office Online

1. After choosing to edit with Office Online, press the **Edit in Browser** button to start editing.



2. Choose whether to exclusive edit or team edit.



3. When the editing session starts, you have access to a fully featured Office editing suite, and can work on documents as you would using Office on the desktop.

# Using the Egress Online Editor

To start editing a document using the Egress Editor:

- Select the document to enter preview mode, and then use the Edit button to choose the edit mode, whether it is Team Edit or Exclusive Edit.

- Alternatively, right click on the document and choose Team Edit or Exclusive Edit.
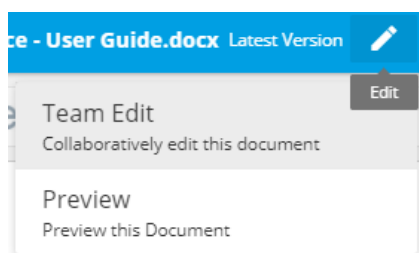


The Egress Editor features a full range of functionality for creating and editing text, spreadsheet and presentation documents.

When a document is being edited, the **Editing** icon is displayed next to the file name in the zone list, and other users are prevented from modifying it using any of the file options. If they have adequate role permissions, and if the current editor is in Team Edit mode they can start editing at the same time.
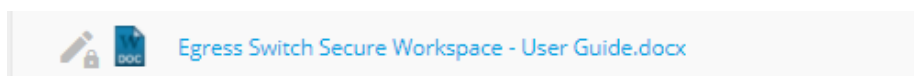
# PDF annotation

Switch Secure Workspace features the ability to annotate PDFs.

1. Navigate to the PDF you wish to annotate. Click the drop-down and choose **Public Annotate** or **Private Annotate.** Alternatively open the document in the document viewer and use the drop-down there to choose an annotation mode.

   o Public annotations are visible by all users who have access to the PDF or the zone in which the PDF is contained.

   o Private annotations are only visible to the user making the annotations.

2. Clicking on one of the options to annotate opens the PDF annotation window in a new tab.

3. There are multiple annotation modes available on the toolbar, including:

   o **Text -** attach text comments to specific sections of the PDF document

   o **Strikeout -** strikethrough specific sections of text

   o **Highlight -** highlight specific sections of text

4. Annotate the document using the modes available and press the save icon to save the annotations.

5. Alternatively, press the undo or reset buttons to undo an annotation or remove the annotations.

# Version control

After closing an editing session using the cross icon in the top right of the screen, the document version will update (please note this may take up to 30 seconds). See the version history of a document by pressing the file **Options** menu (or right clicking) and choosing **Properties** and then the **History** tab.



Uploading a file with the same name as a file that already exists in the zone updates the version number as well.

Previous versions of a document can be viewed from this window, but it is also possible to revert to a previous version and start editing it again. A new version of the file is created which corresponds to the previous version. To start editing a previous version of a file:

1. Go to the file in question's **Version History** menu by right-clicking on the file entry or using the **Options** menu**.**

2. Under the **History** tab, press the clock icon next to the version to which you wish to revert.



3. Confirm the creation of a new version of the file. The version number of the file increases by one and this latest version corresponds to the previous version. It can now be opened for editing.

# Viewing audit logs

After collaborating with multiple users on documents in zones, it is useful to be able to see who has been editing or downloading the files. Users and Administrators can view **Audit Events**, both for specific files and for zones as a whole.

## File audit logs

1. Find the file you wish to examine and either right-click and select **Properties** or use the **Options** menu and select **Properties** from there.

2. Go to the **File Audit Events** tab.

| Properties | History | File Audit Events | | |
|---|---|---|---|---|
| **Date** | | **Description** | **User** | **IP Address** |
| 23 Jan 2018 12:39 | | File Egress Switch Secure Workspace - User Guide.docx edited and saved | John Smith john.smith@egress.com | - |

The events log displays the following information:

- Date of event
- Event description (e.g. file viewed, opened for editing, edited and saved, downloaded)
- User (Name and Switch ID)
- IP Address.

## Zone audit logs

In a zone, go to the **Audit Events** tab to view the events log for the whole zone. This includes the same information as the log for individual files, but it displays the events for every file in the zone.

| Files | Properties | Discussion | Audit Events | Direct Email | Manage Shares |
|---|---|---|---|---|---|

In both events logs, selecting the file name in the events log opens the file in the document viewer.

# Deleting a zone

This process contains two distinct steps to reduce the risk of zones being deleted by accident.

1. Navigate to the zone you wish to delete and select **Archive Zone** in the sidebar. Sending a zone to the archive preserves it in a read-only state. No changes can be made to archived zones.
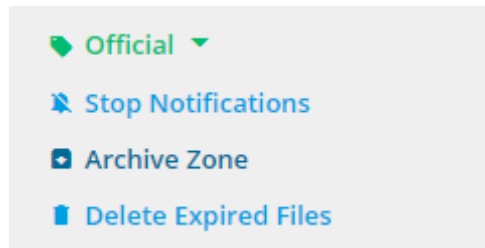


2. Go to the archive by selecting **Archived Zones** in the left-hand sidebar. Locate the zone to delete and select **Action** - **Open Zone.** In the archived zone press the **More** button to view options and choose **Delete Zone**. The zone will then be deleted. In the same drop-down menu you can **Reactivate** or **Share** the zone.
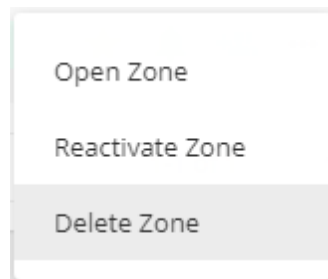
# Signing out of Switch Secure Workspace

For security reasons, Switch Secure Workspace automatically signs users out after 15 minutes (default time, customisable by administrators) of inactivity.

Sign out via the user icon in the top toolbar by selecting **Sign Out**.
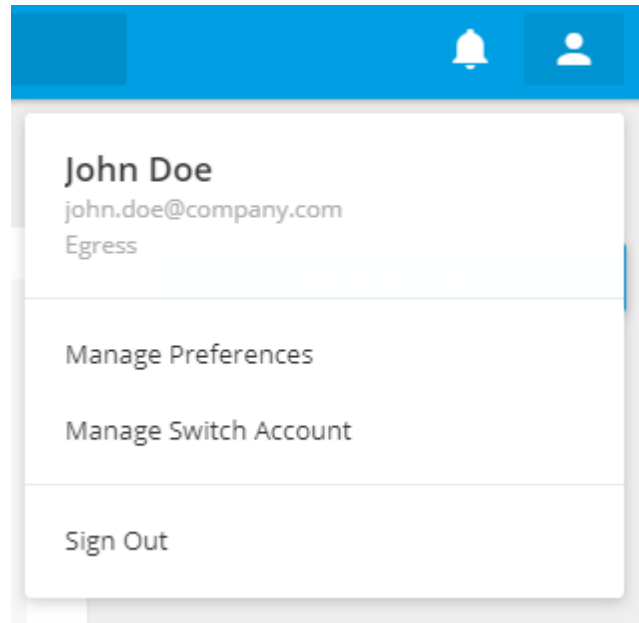


# Additional functionality

Egress Switch Secure Workspace is highly customisable and includes many additional workflow capabilities and features. Please contact your system administrator for additional information on the following:

- **Branding & Customisation**: Customise end user experience with custom branding and intuitive user interface controls.

- **Configurable Access Control**: Integrate with multiple authentication platforms including MS Active Directory SSO and SAML2 compliant Identity providers.

- **Reporting & User Statistics**: View detailed information regarding usage and security incidents.

- **Content Security Policies**: Control which file types and content are permitted to be uploaded to your Switch Secure Workspace.

# Egress **support centre**

Should you encounter any problems with Egress Switch please visit the Egress Software Technologies Support Centre 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

Egress Sales:                          sales@egress.com

Account Services:                   accountservices@egress.com

Support:                                   support@egress.com

## Follow Egress online

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