Egress Workspace

User Guide

VERSION 2

egress

Contents

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1 Introduction

Egress 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 and integrates with existing document management systems.

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

2 Getting Started

2.1 MFA (Multi-factor authentication)

Multi-factor authentication (MFA) ensures that digital users are who they say they are by requiring at least two pieces of evidence to prove their identity.

If it is your first time logging into Workspace, and MFA is enabled, you will be asked to confirm your chosen verification method. The following options are recommended:

- Authentication App (Recommended)
- SMS
- Email

If you select SMS, please be aware of the following limitations:

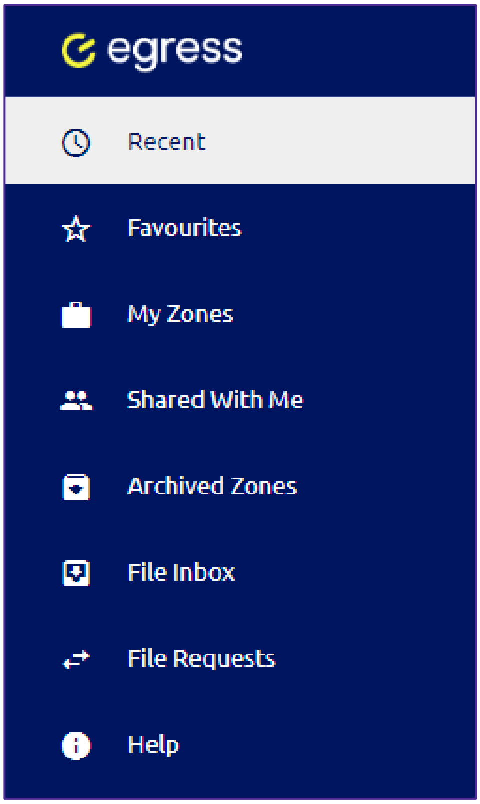
- UK-hosted Workspaces use alphanumeric text messages that are not accepted in all countries and therefore, SMS MFA may not be suitable for you.
- SMS MFA will be unsuccessful for any UK users trying to access US Workspaces. This is because long codes are used which are blocked in the UK.

Note: Once you have chosen your preferred authentication method you cannot change it yourself. To change your authentication method, or the phone number you are using for your authentication, contact your administrator.

2.2 Using the dashboard and sidebar

The homepage is displayed upon signing into Workspace. On the dashboard, recent activity and account information is displayed.

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.



Recent – view a list of recent zones you have accessed.

Favourites – view a list of favourited zones.

My Zones - access your zones and create a new zone.

Shared With Me – view zones that have been shared with you.

Archived Zones – view a list of archived zones.

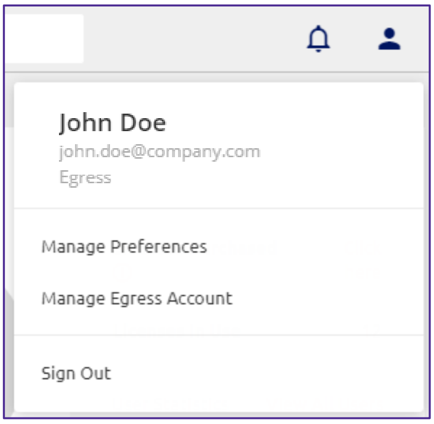
File Inbox - stores files that are emailed to your account. See the File Inbox section for more details.

Help - view support documents and information about Secure Workspace.

2.3 User Panel

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

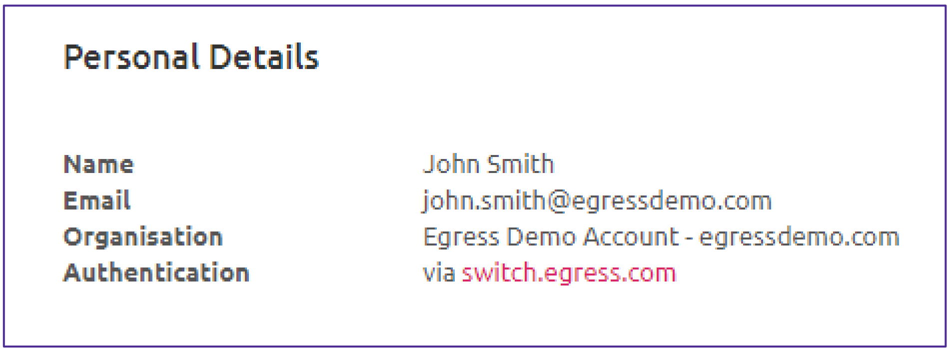
- Manage Secure Workspace preferences.
- Go to your Egress account page at [http://switch.egress.com/.](http://switch.egress.com/)
- Sign out of Secure Workspace.



Use the bell icon to view and manage access requests to your zone. See the [Zone access requests]() section for more details.

2.3.1 Manage Preferences

The preferences page allows you to change certain settings on your account as well as allowing you to view and end sessions. The top of the page displays your details.



2.3.1.1 Communication preferences

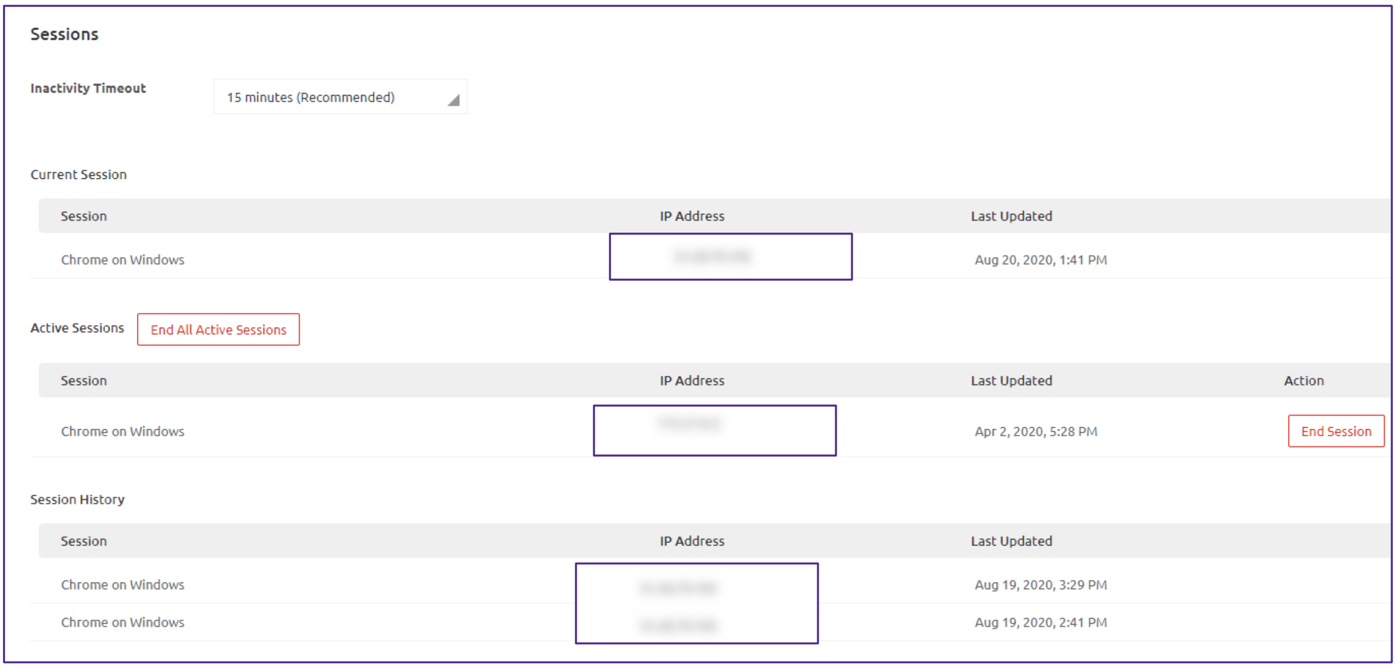
You can opt-in or out of receiving recent activity emails from Workspace by using the Recent Activity Emails checkbox. You can also change your Default Watch Status using the drop-down menu and choose between Watching, Not Watching, and No Preference.

2.3.1.2 Sessions

In this section, you can alter the Inactivity Timeout from 5 minutes up to a maximum of 120 minutes using the drop-down options, the default (recommended) is 15 minutes.

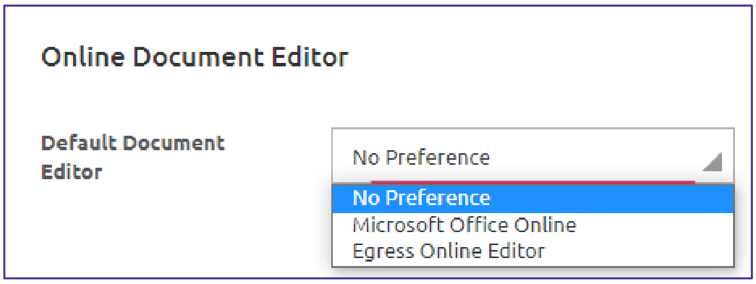
This section also allows you to view the IP address and date and time of your current, active, and past sessions:

- 'Current Session' displays the details of your present session.
- 'Active Sessions' displays details of all sessions currently active using your account.
    - If you see any active sessions that you believe to be suspicious you can End All Active Sessions or click End Session against an individual occurrence.
- 'Session History' displays the details of all your past account sessions.



2.3.1.3 Online Document Editor

The drop-down menu allows you to choose a specific document editor. No Preference will result in you choosing which editor to use every time you open a file.



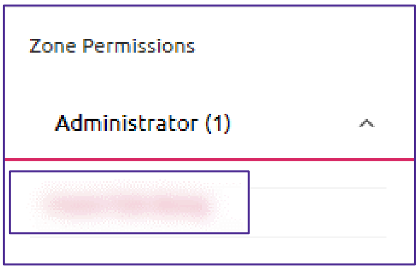
2.4 User roles

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 they are allowed to perform in Workspace. Depending on a user's assigned role, they may not be able to perform all the actions described in this user guide.

There are two types of roles:

- System Roles: Define the core system permissions a user has, such as whether they have access to administration and auditing tools.
- Zone Roles: Zone roles define the capabilities a user has on a per-zone basis.

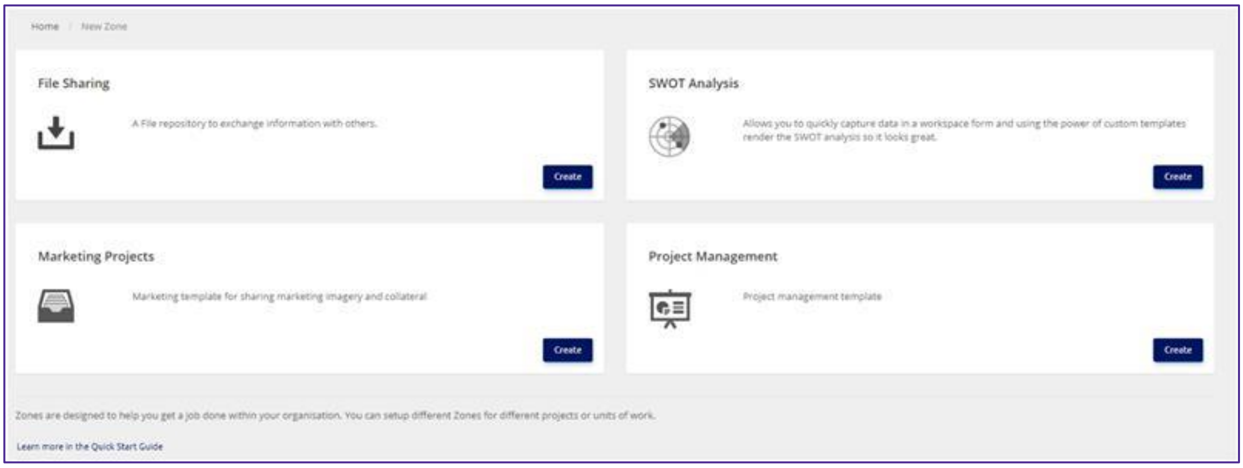
View your system role on the zone dashboard in the My Account section. View your zone role by going to a zone and looking at the Zone Permissions section to see the role under which you are listed



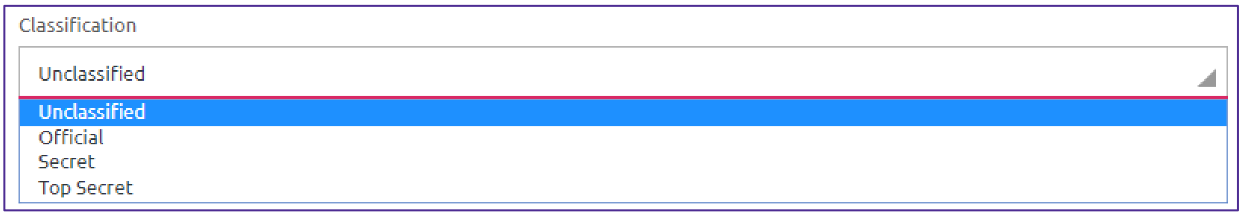
3 Creating Zones

A zone is a secure area for uploading files to share and collaborate with internal and external recipients. To create a new zone:

1. Select My Zones and click New Zone.
2. Select a zone template and click Create.



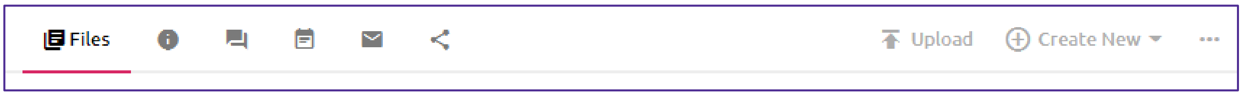
3. A dialog box appears. Give the new zone a title and a description.
4. Use the dropdown menu to choose the classification of the zone, for example Unclassified, Official, Secret, or Top Secret. Classifications can be customized as required by your organization's dedicated Egress account manager.



5. Use the tick box under Watch Status to set whether users watch the zone by default.
6. Make the zone active using the tick box at the bottom of the page. Leaving this option unchecked will place the zone in the archive. Archiving a zone is a way of preserving the zone in a read-only state.
7. To complete the zone creation, click Create Zone. To cancel the creation of the zone, click Cancel.

3.1 Zone options

All zones have a toolbar containing various 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 event 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.

3.2 Uploading files to a zone

To add files to a zone:

1. Navigate to the zone using My Zones. Select the zone you wish to add files to.

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

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

4. Select a Classification level for the file.

5. 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.

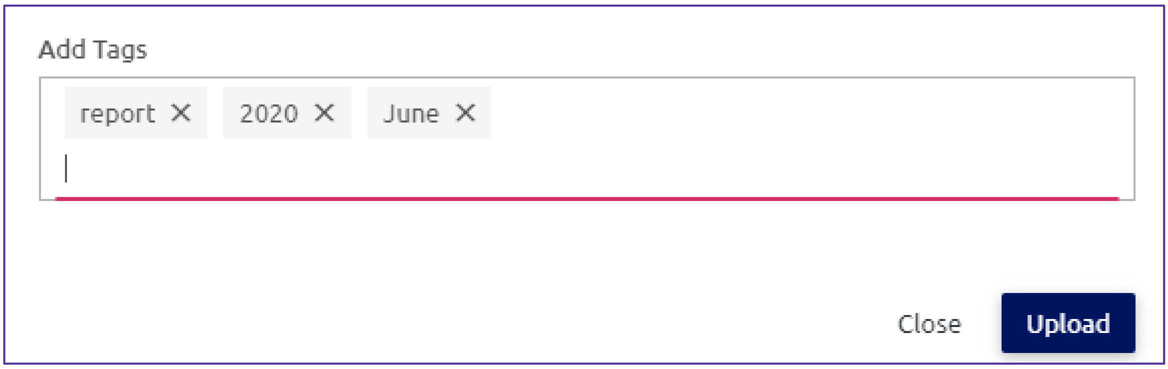
6. Click Upload to upload the files. Click Close to close the upload window. Once uploaded, the files appear in the main zone window.

Note: Your Secure Workspace administrator may have put file restrictions in place to prevent users from uploading certain formats.

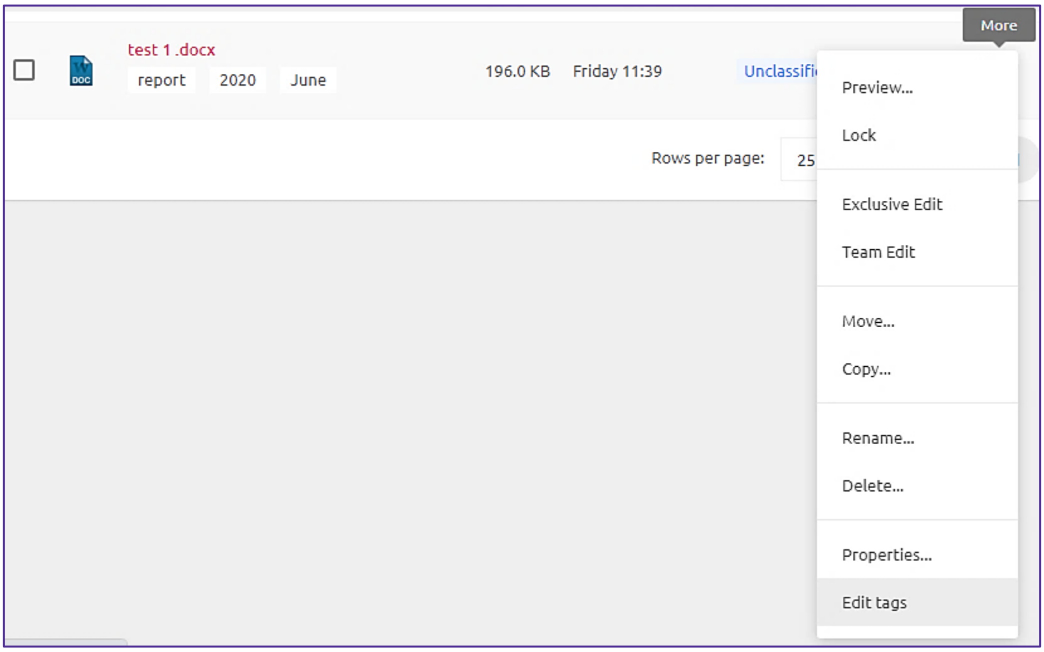
3.2.1 Tagging files

When you upload a file to Secure Workspace, you can add tags to it. Tagging makes it quicker and easier to find information or specific files.

- To tag a file, simply type your keyword(s) into the Add Tags box at the bottom of the upload window.



- Tags will be displayed beneath the filename once the file has been uploaded.
- You can add or change tags at any time by clicking the More icon next to your file. This will open the document properties and allow you to make changes.

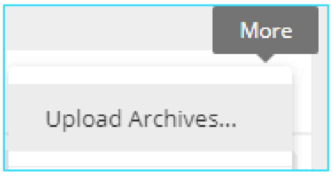


3.3 Uploading archives to a zone

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 select Upload Archives.

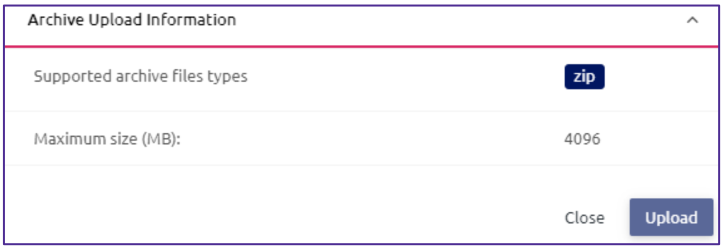


Note: selecting Upload Information here displays a list of the file types allowed in this specific zone.

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 click 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. Select Archive upload information to display a list of supported archive file types.



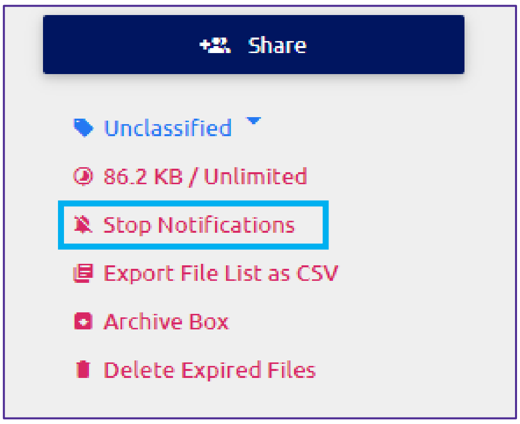
5. Press Upload to upload the archive. The files should extract into the zone and be available for editing, sharing, and downloading. Please note this process may take some time for large archives.

3.4 Watching Zones and Notification Settings

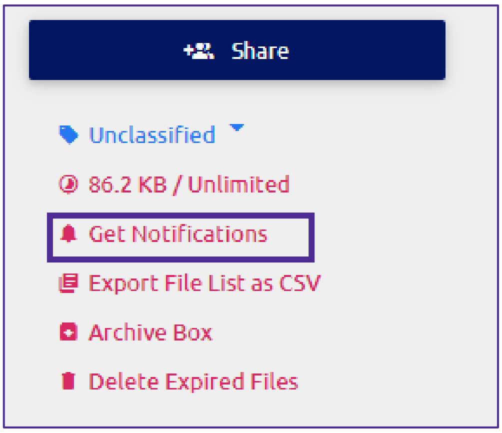
As a user, you can configure whether you would like to receive event notifications for a particular zone you have access to. The type of events you can be notified of are configurable by a system administrator but include functions such as file upload/download, sharing files, etc.

These notifications are linked to File/Folder permissions and subsequently linked to overall Zone permissions.

- To stop receiving notifications for a zone, select Stop Notifications.



- To receive hourly notifications set up for a zone, select Get Notifications.



3.4.1 Managing preferences

You can set your 'Default Watch Status' for your Zones and Zones that are shared with you by going to Manage Preferences and selecting your preferred choice under the Communication Preferences section.

Users are also able to turn off 'Recent Activity E-mails' by unchecking the tick box. If this box is unchecked, then the user will not receive 'Recent Activity Emails' regardless of any other settings that they have applied.

3.4.2 Default Watch Status

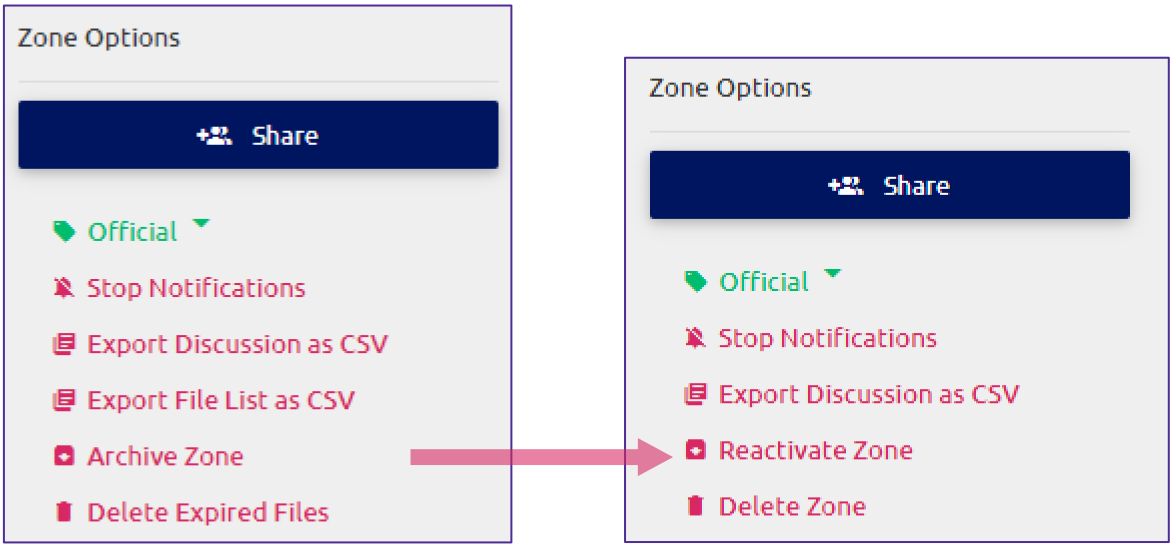
When a Zone is created, the Zone Admin can set the default watch status for all the users that they have shared the Zone with. This is within the Zone Properties.

If they tick the Watch Status box then by default, all users will receive the Recent Activity notifications for that Zone. The only exception to this will be if the user has changed their own 'Default Watch Status' or if they have opted to Stop Notifications for the zone.

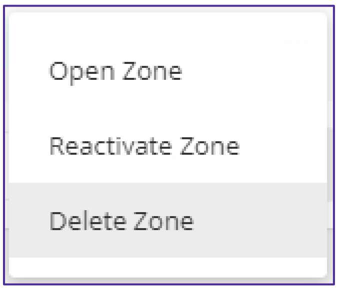
4 Deleting Zones

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. (You can also reactivate the zone from this same menu.) 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, click More 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.



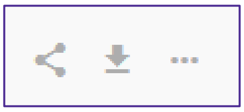
5 Managing Files and Folders

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

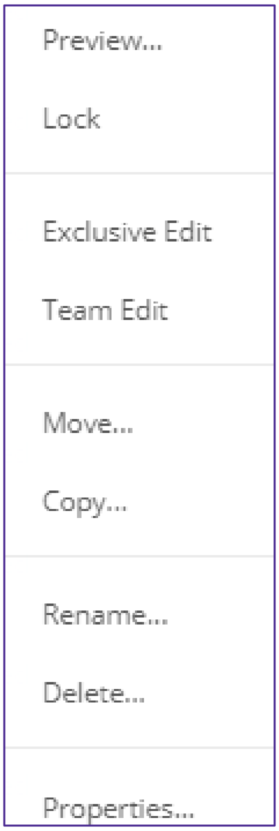
- File name
- File size
- Classification
- Date of last modification

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.



Click the More 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.

5.1 Creating Folders

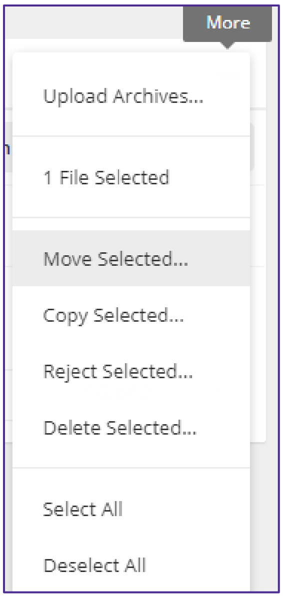
- In a zone, click Create New and select New Folder in the drop-down to create a folder.
- Give the folder a name in the New Folder message box.
- Place files in the new folder by selecting the tick boxes next to the required files, then click on the More options icon, Move Selected, and choose the new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

5.2 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. Click the Options icon.

3. To move the selected files, click Move Selected. Alternatively, delete them by pressing Delete Selected.



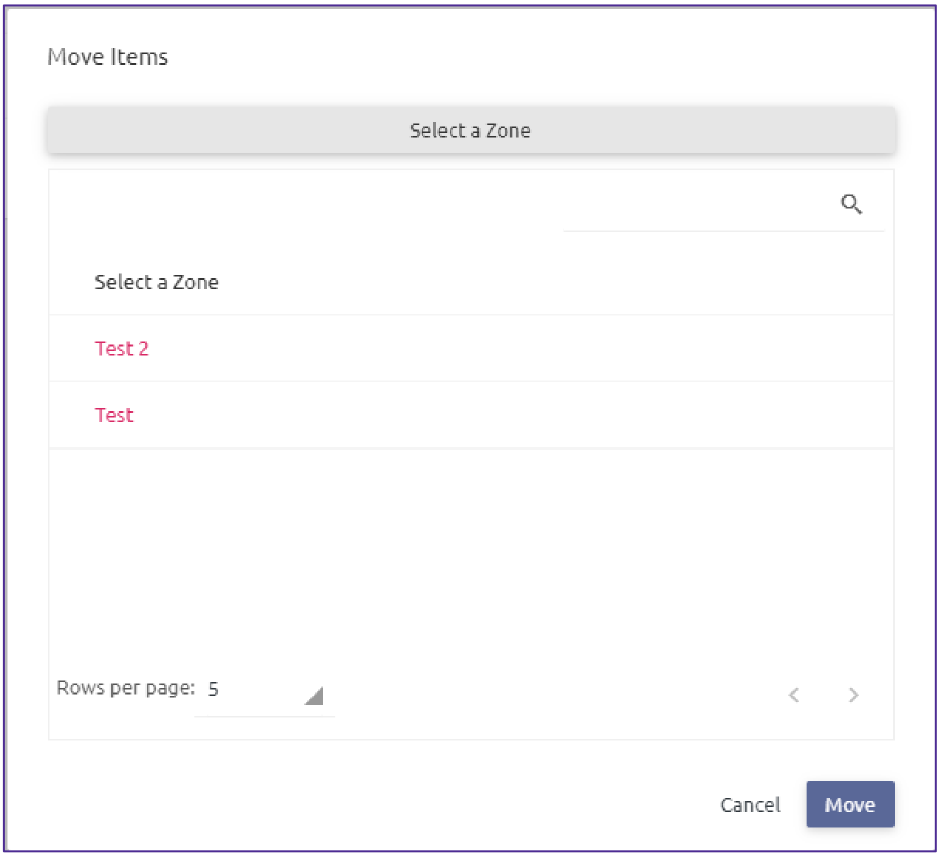
4. In the Move File menu, select the desired folder location.

5. Click 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 click Move.
4. In the next menu, choose a folder location within that zone then click Move.

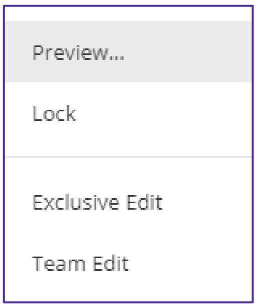


5.3 Previewing Files

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
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, select Preview from the file options menu. The viewer opens in a new tab.



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

5.4 Exporting Files

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

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

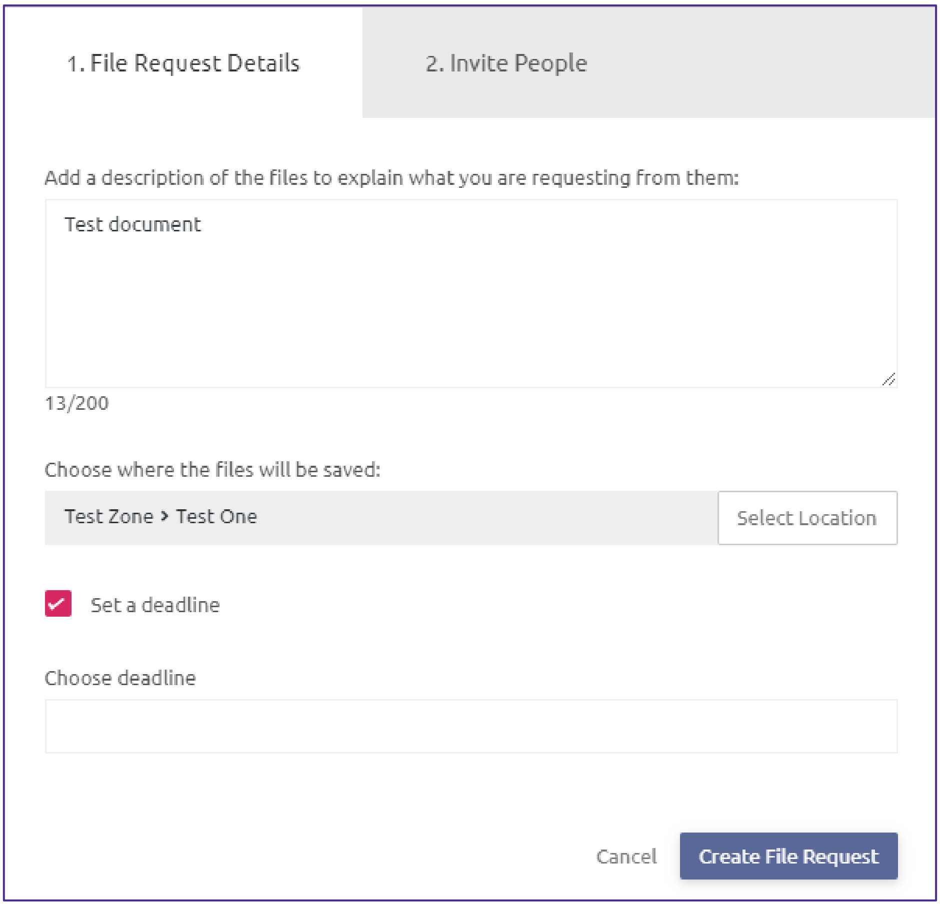
5.5 Requesting files

Workspace allows you to request files to be added to a specific zone and folder of your choosing:

1. In the side menu, click File Requests.
2. The File Requests page displays all your current and past file requests. Click on Request a file to begin a new request.

3. A pop-up window opens with two tabs. In the 'File Request Description' tab you can:

    a. Add a description of the file and an explanation for the request you are sending.
    b. Choose the location the file will be saved; you can choose any existing zone or folder.



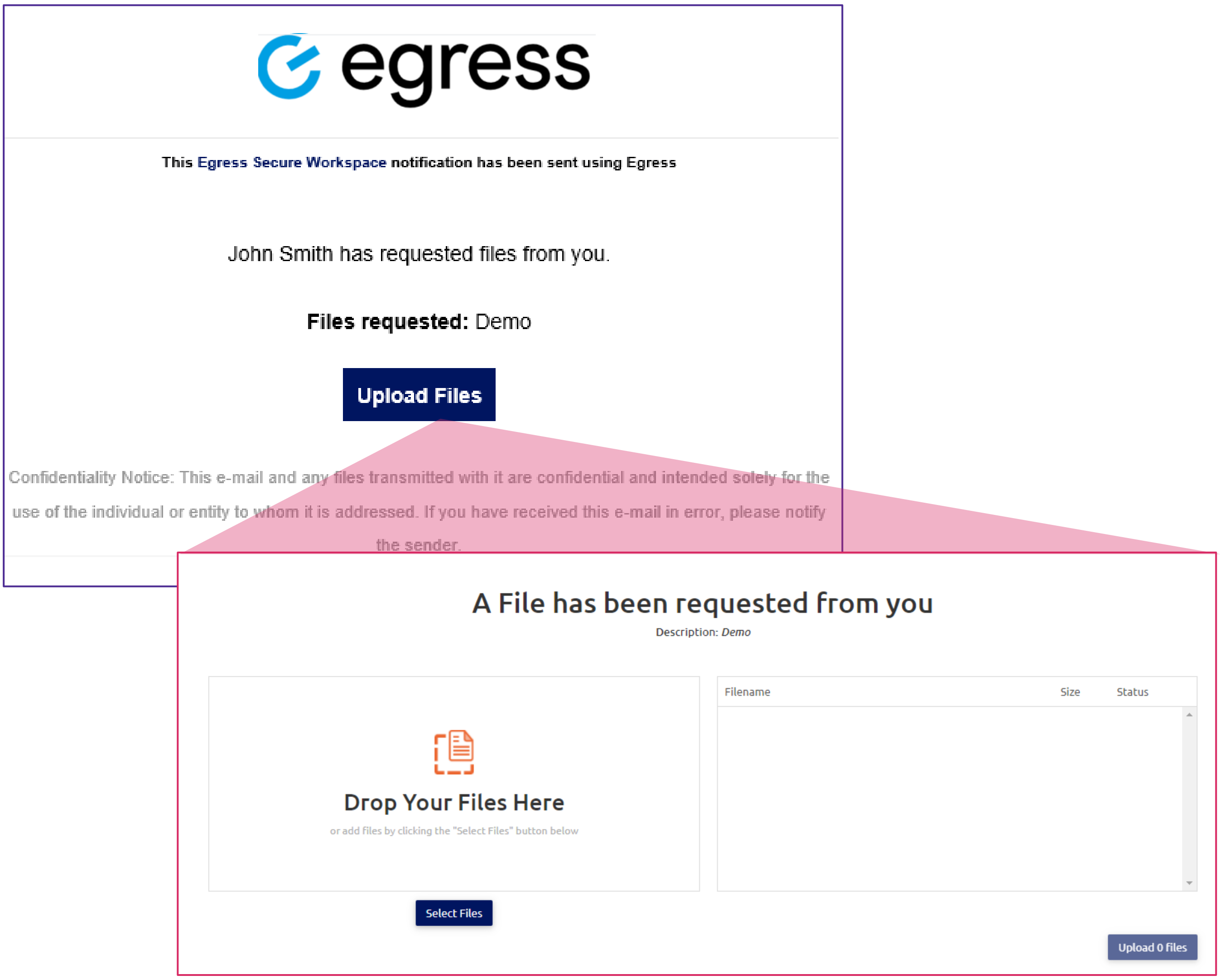
    c. Set a deadline:
        i. Check the tick box to Set a deadline.
        ii. Select your date from the calendar and click OK.
        iii. Select the time of the deadline and click OK.

4. Once you have filled in all the fields and added the deadline, click Create File Request. This will take you to the second tab 'Invite People'.

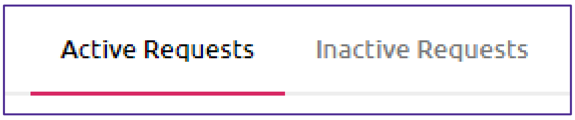
5. On the 'Invite People' tab you can add the email addresses of the people whom you would like to send the request. You can also add an optional message to be included in the email they will receive.

6. Alternatively, if you wish to make the request using your email you can invite people by using the link generated under 'Invite by link'.

7. Once a request has been sent, the user will receive an email with a link to the location where they need to upload their files. They can then select the relevant files and add them to the location.



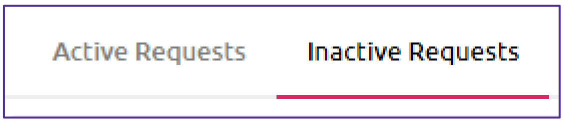
8. Once you have made your request it will be shown under 'Active Requests'. The time the request was sent and the expiry (if this has been set) will be displayed alongside the request.



9. Click View to see summary of a request.

10. Click End Request to finish a request. This will prevent anyone else from adding files to your chosen location.

11. Any ended or expired requests will be under 'Inactive Requests'.

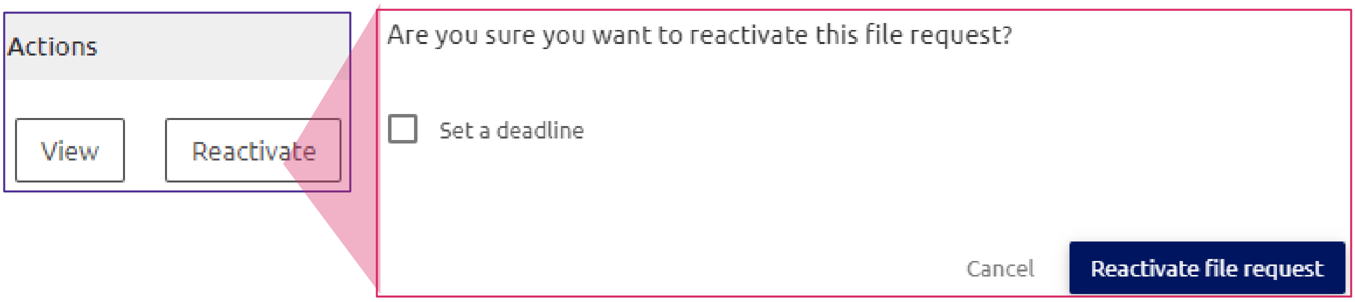


12. Click View to see a summary of a request.

13. Click Reactivate to make a request active again.

14. A pop-up window will appear which will allow you to set a new deadline if required.

15. Click Reactivate file request to complete the process. The request will now return to the '**Active Requests**' tab.



6 Creating Documents in a Zone

Workspace allows you 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. Click Create New and on the drop-down menu choose the type of document to create, either Word Document, Excel Spreadsheet, or PowerPoint Presentation.

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.

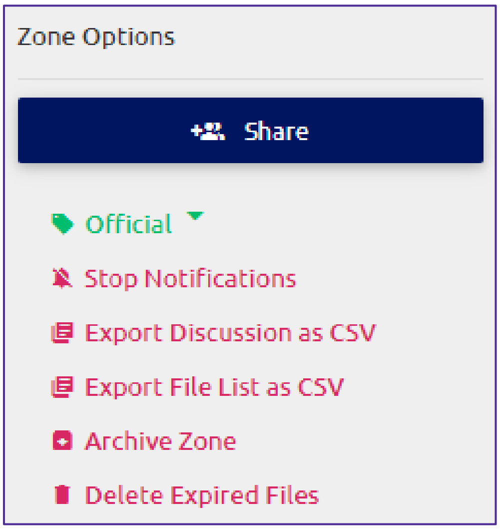
3. Click Create. The new document will appear in the zone's file list and will automatically open in Team Edit mode so that you can start working on the document straightaway.

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

7 Sharing

7.1 Sharing zones

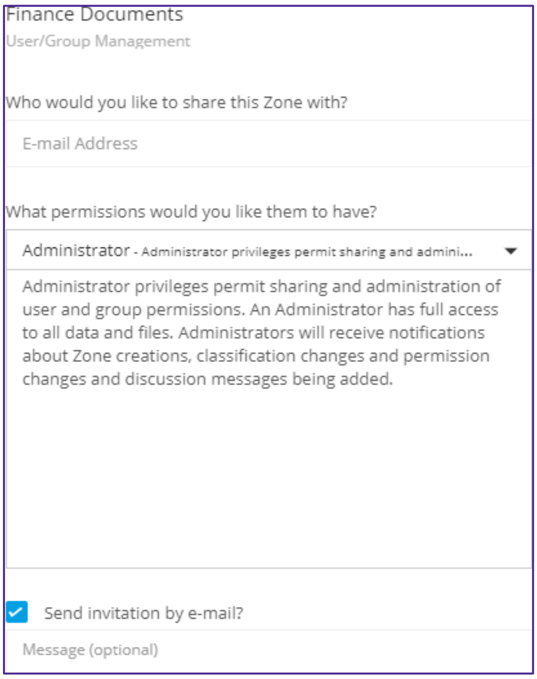
To share a zone with other users, press the Share button on the right-hand side of the zone. This opens the share dialog box, where you can add new users to the zone.



To share with one or more new users simply:

1. Click Share to open the share dialog box.

2. Type in the user's email address 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.

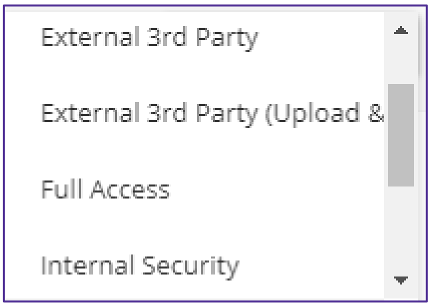
4. Select whether they should receive an invitation email, with an optional message.

5. Click 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 setup 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 an Egress account since they will be prompted to sign up when they are invited. The users who have access to the zone are listed under the Share button on the right-hand side of the page, under their corresponding zone role.

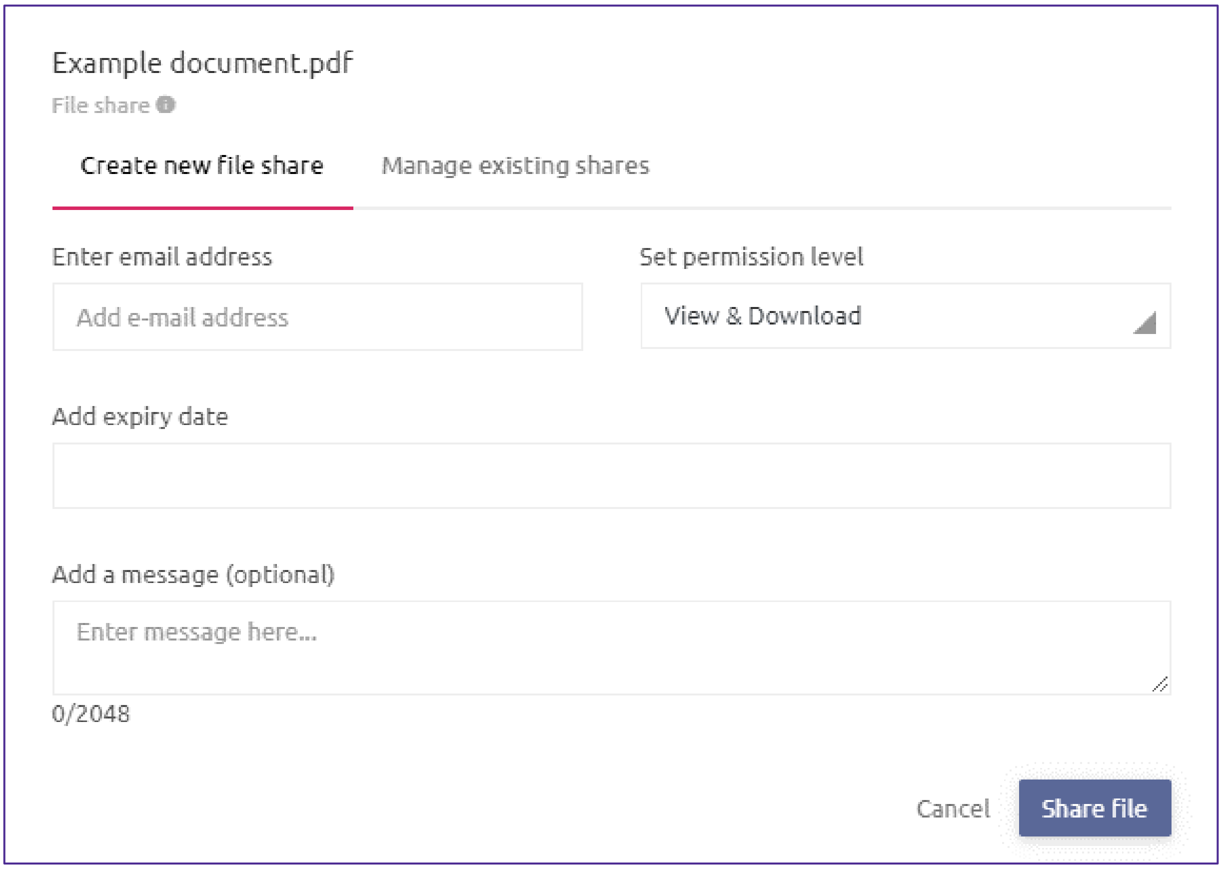
7. Amend or revoke zone permissions by clicking Share, then going to the Existing Shares section and clicking the cross or changing the access level next to the specific user's entry. Removing a user prevents any further access to the zone.



7.2 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. Click Share file to be given a link to share with your intended recipient.

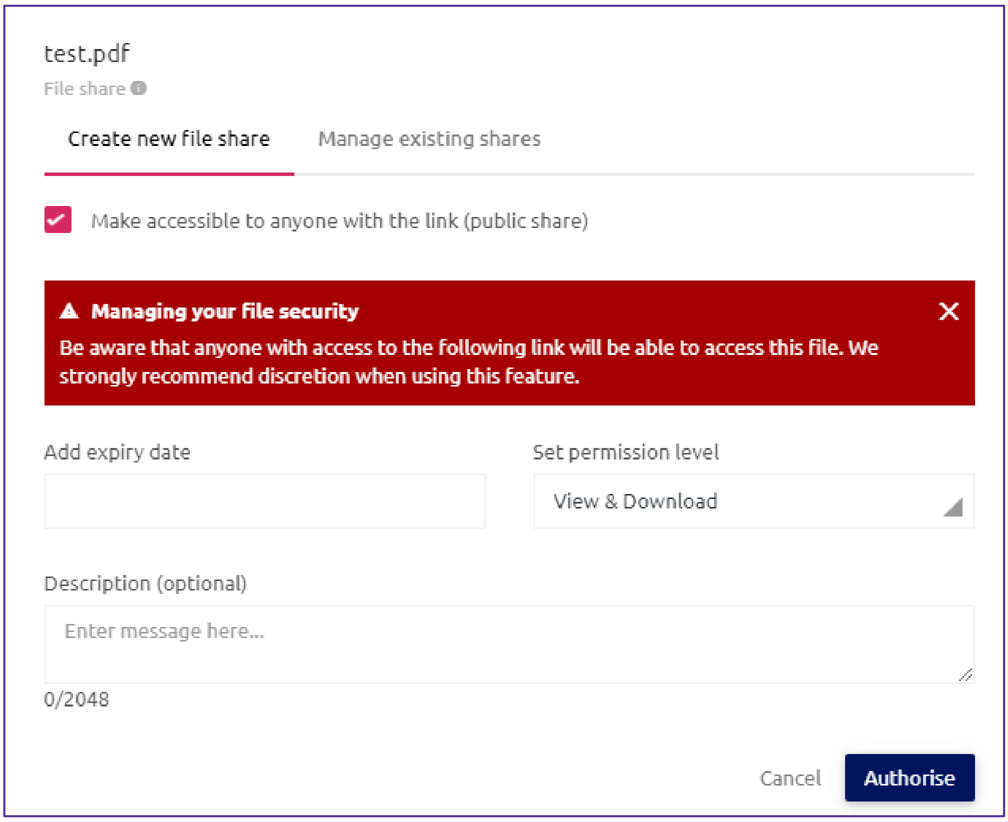


7. Select Copy to clipboard for quick and easy sharing.
8. Once the user follows the link, they will see that you have shared the file along with your message if you chose to include one. Depending on the permissions chosen they will be able to preview, download, or go to the zone where the file is located.

7.2.1 Create a 'public share' for an individual file

When sharing a file, you can choose to make the file accessible to anyone with the link rather than specific users only.

1. To create a public share link, tick the box that says, Make accessible to anyone with the link.
2. Use the drop-down menu under Set permission level to choose whether the recipient of the public link can view and download the file, or only view it.
3. You will be asked to authorize the public sharing of the file and accept a disclaimer.

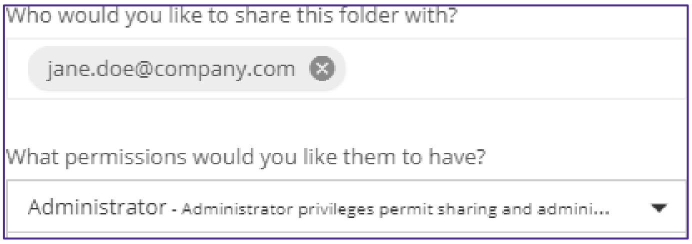


4. Once authorized, you will be able to copy the link to your clipboard or send it via email.
5. Whenever a public link is created, all the Admins of that zone will be notified.

7.3 Sharing Folders

1. To share a folder within a zone, click 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 to the user(s).

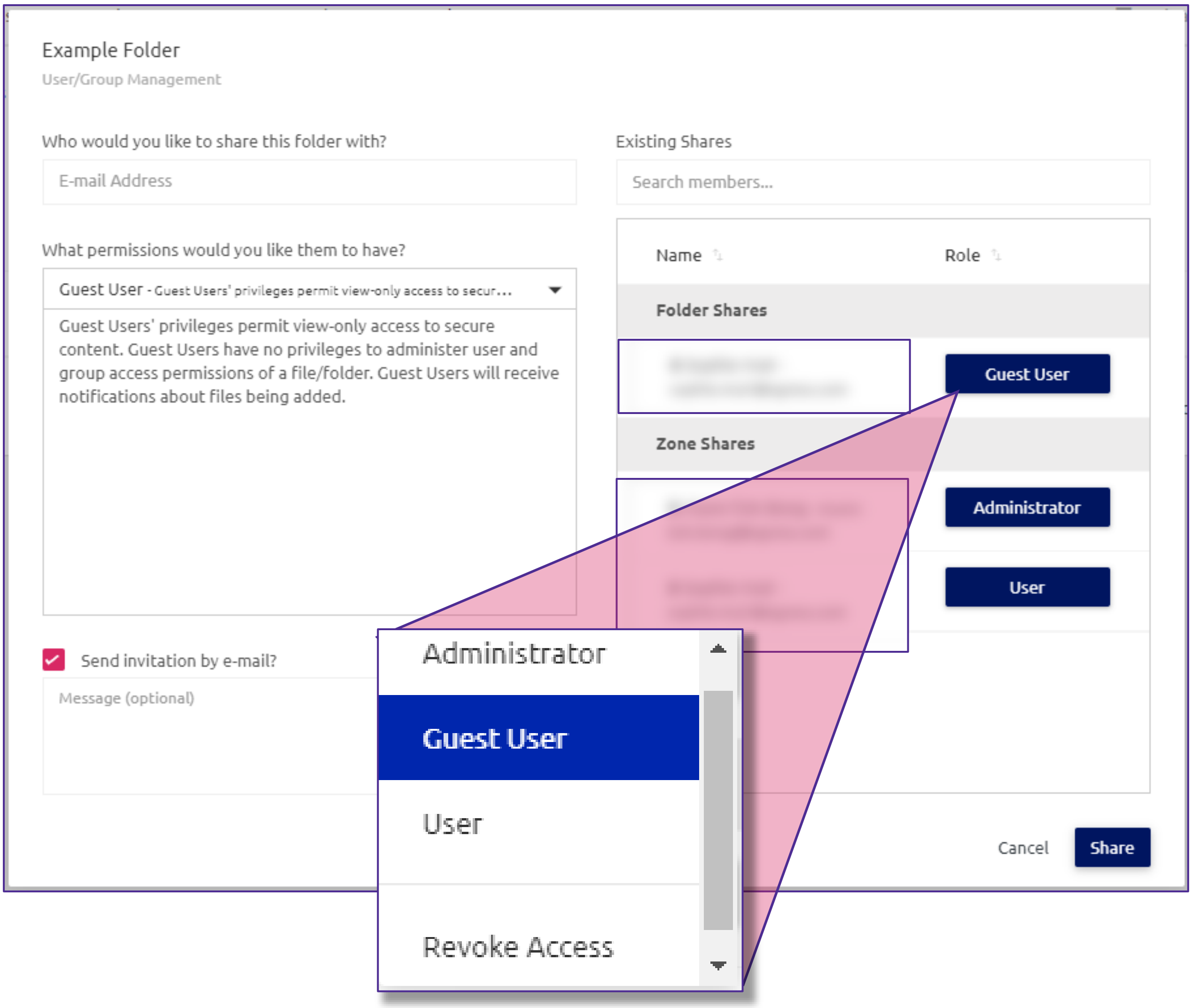
4. Tick the box to send an invitation email. You also have the option to include a message.

5. Click **Share.**

7.4 Manage Shares

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 within that zone and provides the ability to change the user access level of folder and zone shares.

1. To change the access level for a user, click on their role and select a new one from the drop-down menu, or you can choose to revoke their access altogether.

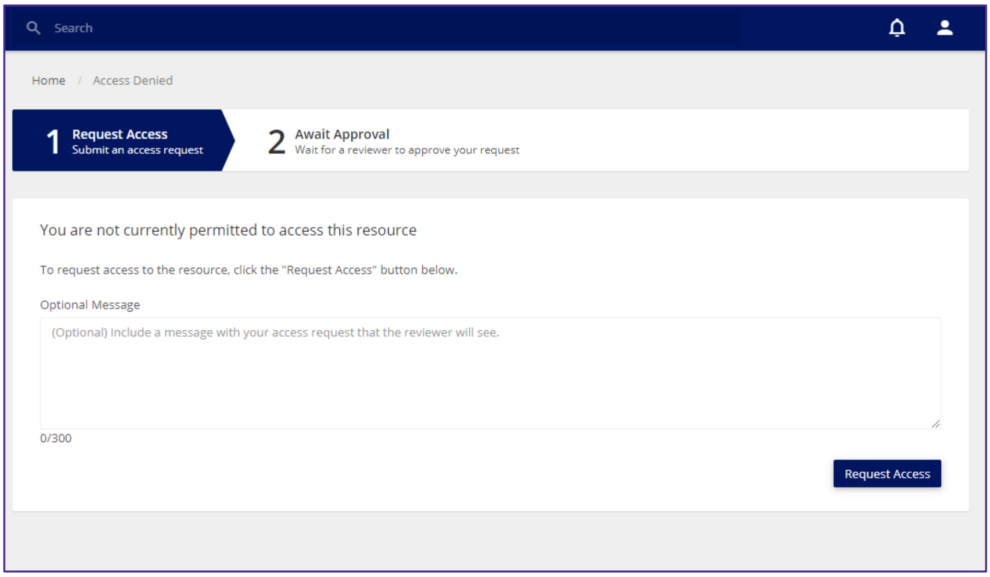


8 Zone Access

8.1 Zone Access Requests

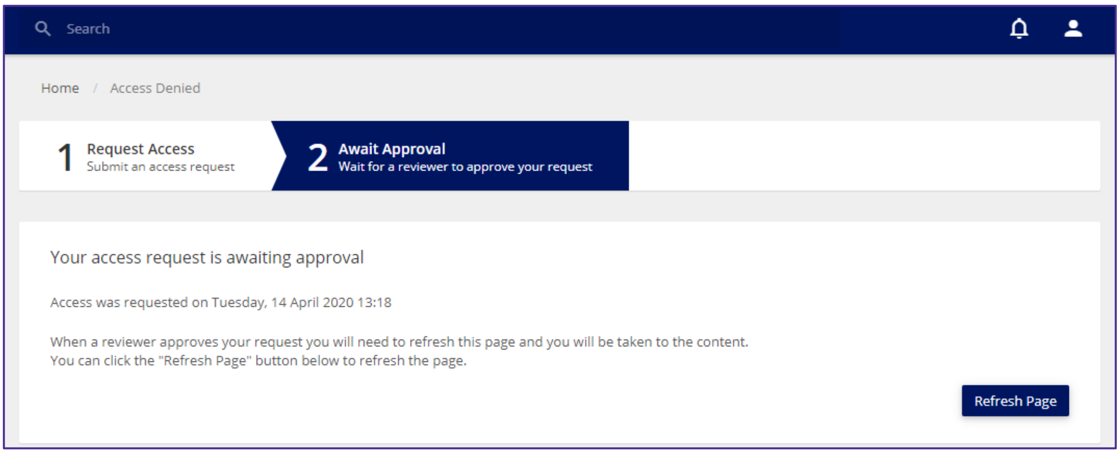
1. If a user follows a URL link to a zone without previously being invited to it, they will see an access denied page.

2. Users can request access to zones they don't yet have permission to view by filling out the message box on the access denied page and clicking Request Access. The zone owner receives the access request.

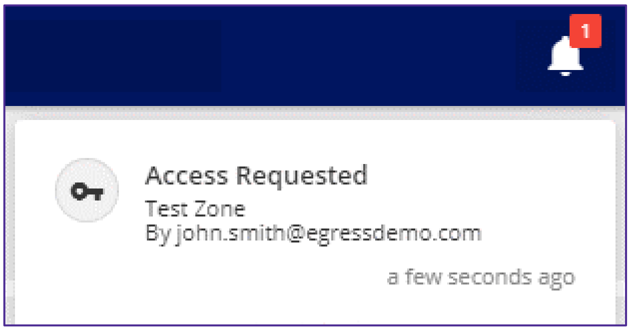


3. After making an access request, the requester will be shown a screen informing them that their request is awaiting approval. They will see the details of when they sent the request and their message (if they added one).

4. This screen will appear again if the user tries to access the zone again before the request has been approved.

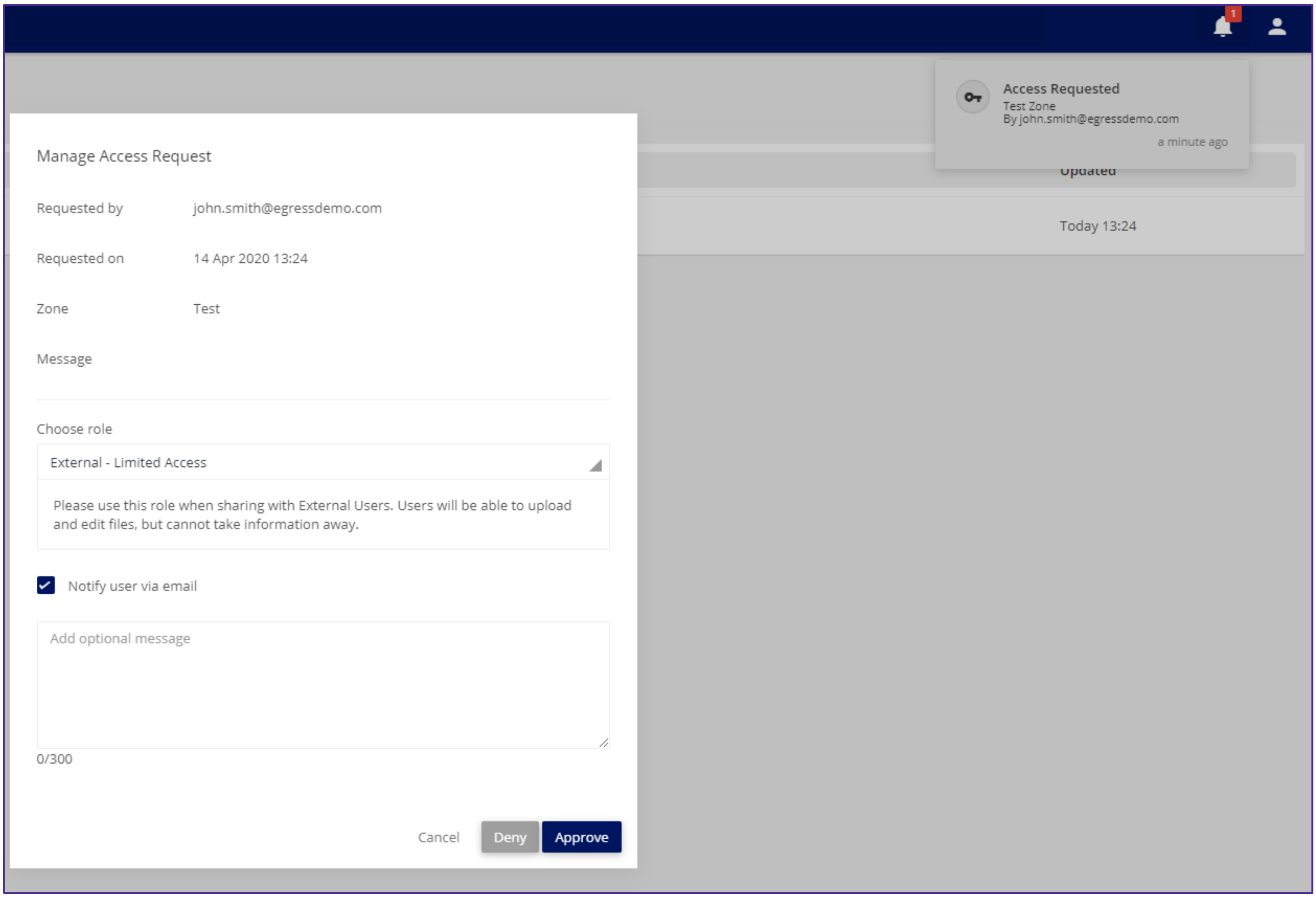


5. If a user requests access to one of your zones, you will see a notification by the user panel icon. Select the notification icon and click on the request to open it.



6. Once you have clicked on the request a pop-up window will appear to allow you to approve or deny the request.

7. If the Notify user via email box is ticked, then the requester will receive an email to inform them of your decision. They will also receive your message should you choose to add one.

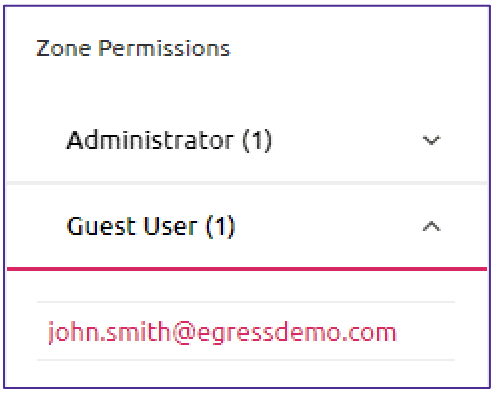


8.2 Revoking access to a zone

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 you wish to revoke access.
2. Under the Share button there is a list of users and groups with access to the zone, organized 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. Click Save to confirm the changes.

9 Editing and Collaborating

Workspace allows 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 from editing at the same time so when one person starts editing a document exclusively, other collaborators are locked out or only permitted to view it. Some default zone roles do not allow the ability to exclusively edit a document.

9.1 Online document editing

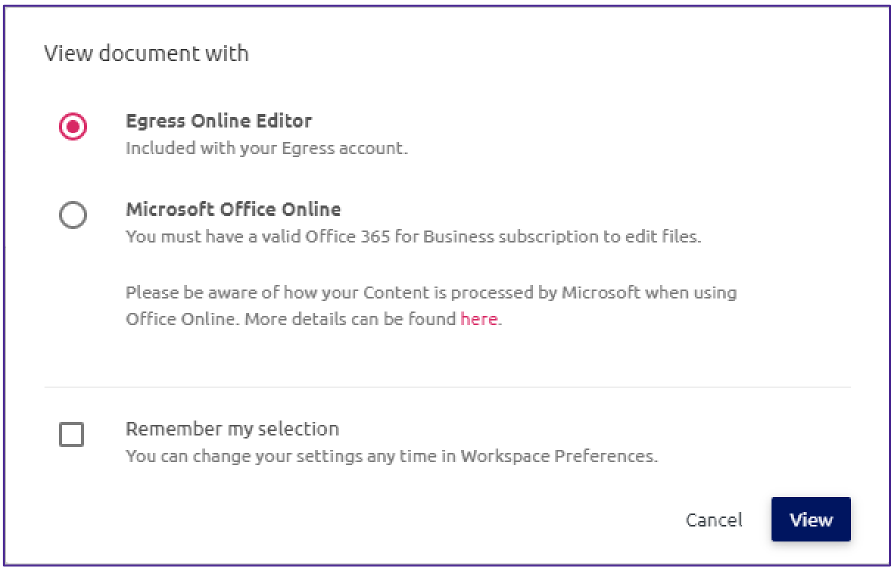
When you open a document for editing, there are two document editors available:

- Egress Online Editor: The feature-rich document editor is included with all Secure Workspace subscriptions.
- Microsoft Office Online: Browser-based versions of the Microsoft Office apps: Word, Excel, and PowerPoint. A valid Microsoft 365 for Business subscription is required to use Office Online.

Note: Your Workspace administrator may have pre-defined the document editor that your organization uses. If this is the case, you will not see the options menu to choose your preferred editor and will instead be taken straight to the document editing screen.

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. Click View.



9.2 Using Microsoft Office Online

1. After choosing to edit with Office Online, click Edit in Browser 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 Microsoft editing suite and can work on documents as you would using Microsoft Office on the desktop.

9.3 Using the Egress Online Editor

To start editing a document using the Egress Editor:

1. 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.

2. 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, spreadsheets, 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.

9.4 Changing the Default Editor

Your administrator may have pre-defined the document editor that your organization uses. If this is the case, you will not see the options menu to choose your preferred editor and will instead be taken straight to the document editing screen.

If you have the option to choose your preferred editor, you can change this preference at any time.

1. Select the user icon in the top right-hand corner of the interface and choose Manage Preferences.

2. In the Preferences window, use the drop-down menu in the Online Document Editor section to choose a new default editor.

Note: This option will not be available if your Secure Workspace administrator has pre-defined the editor to be used in your organization.

9.5 PDF Annotation

Workspace features the ability to annotate PDFs.

1. Navigate to the PDF you wish to annotate.

2. 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.

    a. Public annotations are visible to all users who have access to the PDF or the zone in which the PDF is contained.
    b. Private annotations are only visible to the user making the annotations.

3. The PDF opens in a new tab.

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

    a. Text: Attach text comments to specific sections of the PDF document
    b. Strikeout: Strikethrough specific sections of text
    c. Highlight: Highlight specific sections of text

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

6. Alternatively, click the undo or reset buttons to undo an annotation or remove the annotations.

9.6 Version control

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

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, click the clock icon next to the version to which you wish to revert.

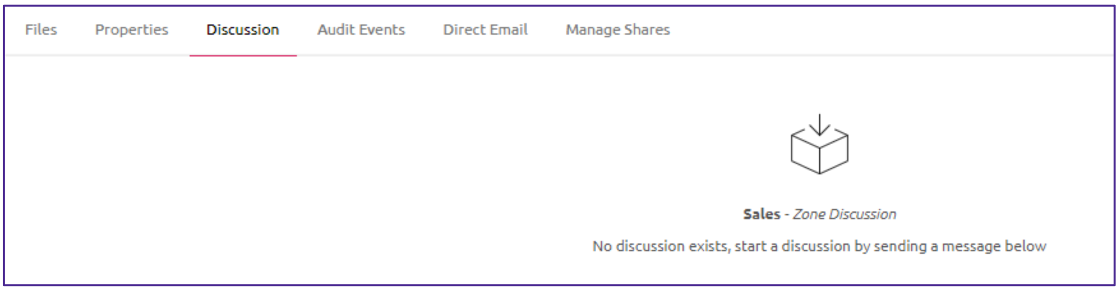
Version	Date	Size	User
2	23 Jan 2018 12:39	4.5 MB	John Smith
1	23 Jan 2018 12:18	4.9 MB	John Smith

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.

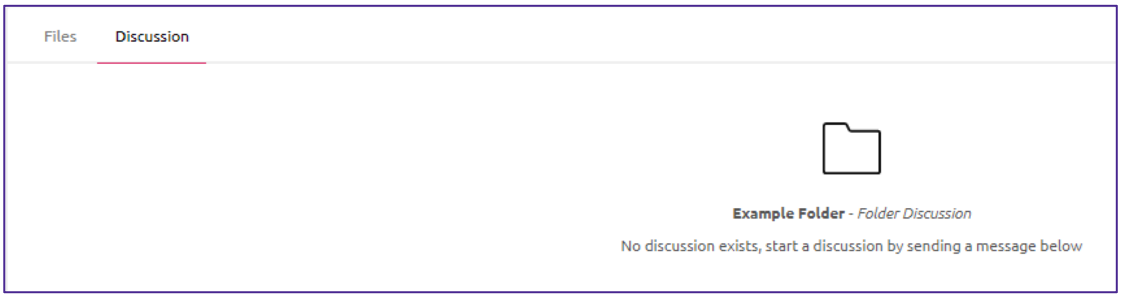
9.7 Discussions

To assist with collaboration, Workspace allows users to have discussions within zones or specific folders.

1. The Discussion tab is visible at the top of your zone or folder. Clicking on it will open the discussion for that area.



ZONE DISCUSSION



FOLDER DISCUSSION

2. The user's messages are displayed in a yellow box. Messages from other users appear in a grey box with their namenames played beneath.

3. Discussions can be exported by clicking Export this discussion at the top of the window. Those with the appropriate permission will also be able to view messages that have been deleted when they export a discussion.

10 File Retention and Recycle Bin

File retention allows a standard deletion date to be set for all files being uploaded by any user onto Egress Secure Workspace.

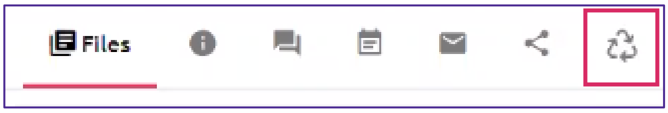
The policy can be set up with a:

- Soft delete policy: The retention policy will pass the files to the respective Recycle Bin for the Zone where the file resides; this allows users to retrieve files before they are deleted.
- Hard delete policy: Files are deleted when they reach the end of the period defined by the policy. The Recycle Bin is not used.

Data retention rules can be amended, enabled, or disabled by administrators.

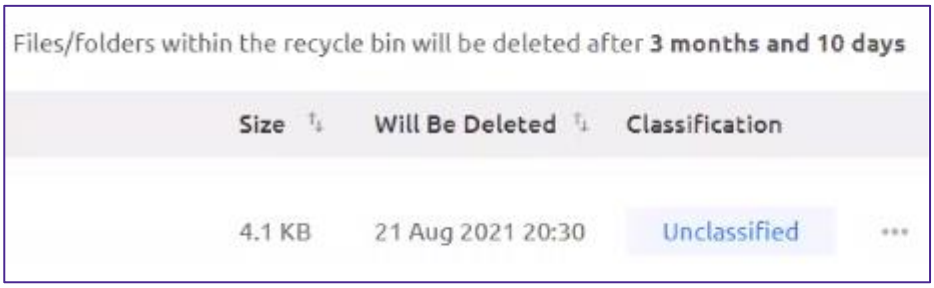
10.1 Recycle Bin

If the Recycle Bin is enabled, an icon will be displayed at the top of the window for the Zone that you are in.



When you delete a file within a Zone, it will appear in the Recycle Bin. The deletion policy set up for your organization will be shown at the top right of the window.

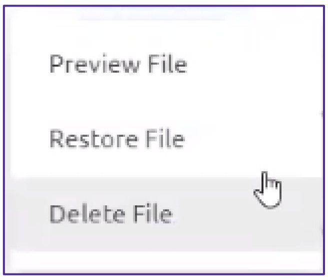
Files and folders within the Recycle Bin will also have a deletion date displayed under the Will Be Deleted column so users know exactly how long a file will be stored there.



10.2 Recycle Bin Options

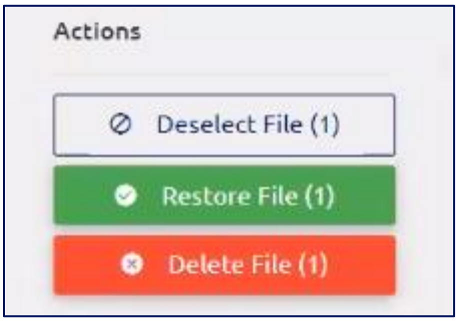
You can Preview, Restore, or Delete items from the Recycle Bin by doing the following:

1. Click on the 3-dot icon next to the file. A pop-up menu will appear which will allow you to perform one of the three actions.



2. Alternatively, you can select multiple files by clicking on the check boxes beside them or Select All by clicking the button on the right of the screen.

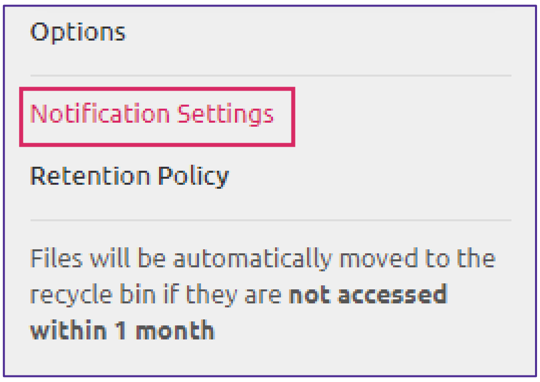
3. Once selected you can use the buttons on the right-hand side to deselect, restore, or permanently delete the files. The number of files chosen will be displayed in brackets on the button.



Note: If you delete a file from the Recycle Bin it will be permanently deleted.

10.2.1 Notification settings

From within the Recycle Bin, users can click on Notification Settings to amend their communication preferences.



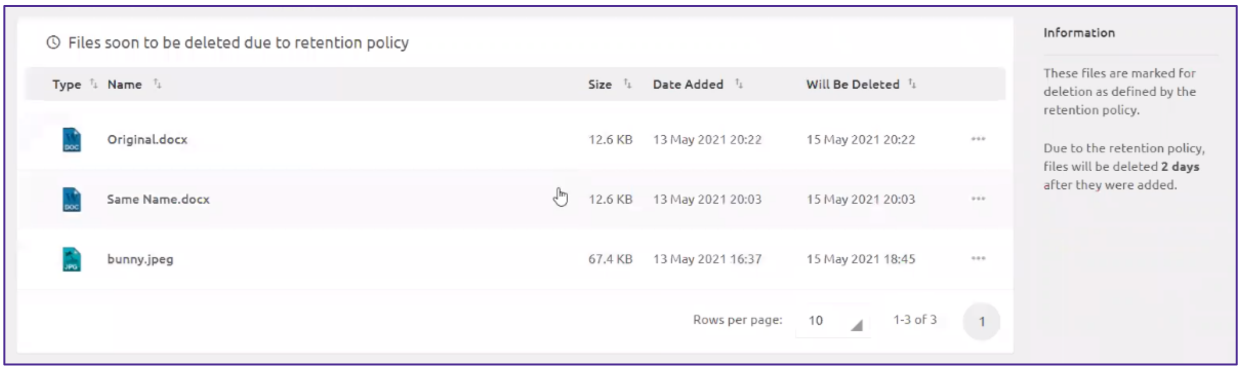
Clicking on Notification Settings opens the User Preferences page.

10.3 Hard Delete Policy

If your organization has a Hard Delete Policy in place, then the Recycling Bin will be disabled, and you will not be able to use it. Files are automatically deleted permanently when they reach the end of their retention period under a Hard Delete Policy.

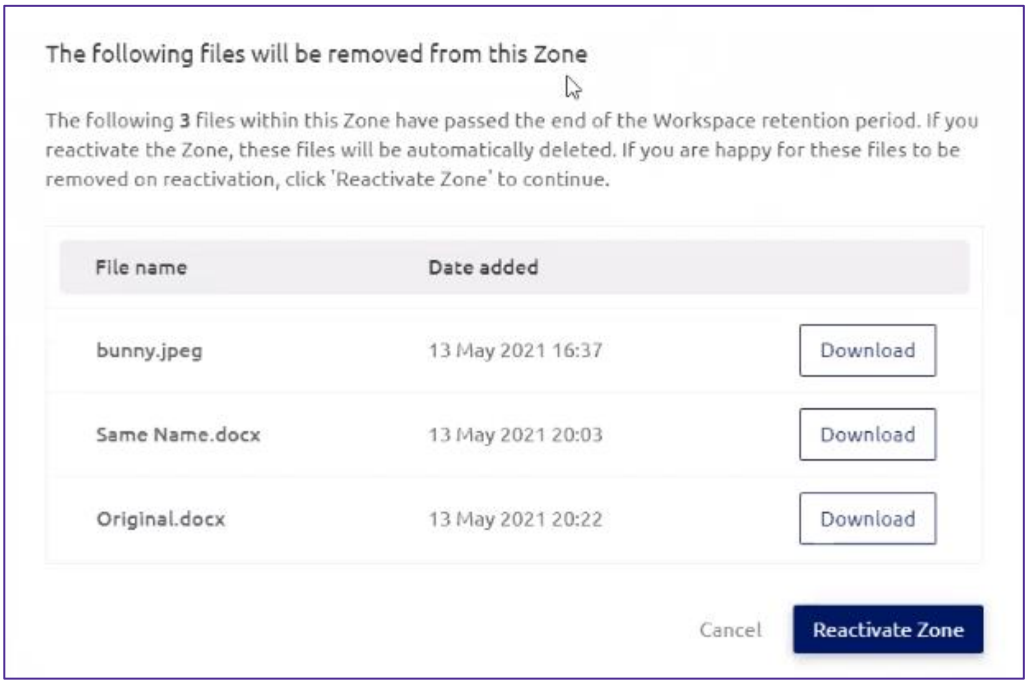
Files that are nearing the end of the retention period will be flagged to warn users that they are soon to be deleted, hovering over the item will let you know how long the file has left.

If the zone has a large number of files, you can also select Files soon to be deleted on the right-hand side of the window to view a full list.



10.3.1 Reactivating a Zone

If you have set up a Hard Delete Policy and later choose to reactivate a previously archived Zone; then you will be notified if any files will be removed upon reactivation. You will have the option to download these files before reactivating the Zone.



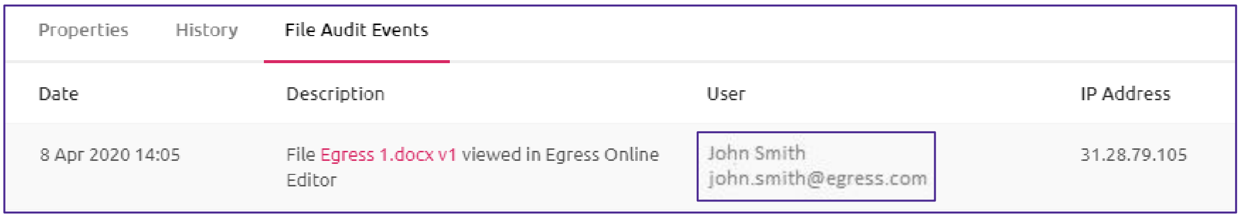
11 Viewing Audit Logs

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.

11.1 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.



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 Egress ID)
- IP Address

11.2 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.

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

12 File Inbox

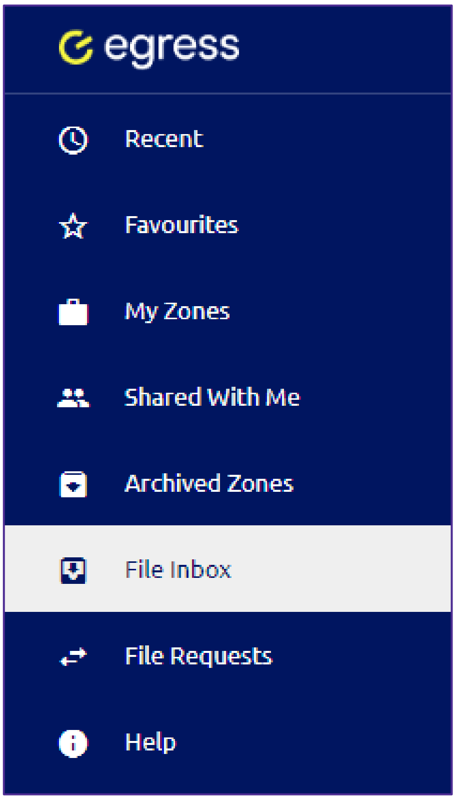
Using the File Inbox, you can email files and messages to your Secure Workspace account and access them from the navigation sidebar or a zone. Note that File Inbox is an opt-in feature and may not be available to you.

To email a file to Workspace:

1. Send an email from your Egress-registered email address to your Secure Workspace email address, which will be of the form: upload@yourworkspacedomainname.egresscloud.com. Make sure the required file(s) are attached.

2. Once the file has been received and processed, a notification appears next to the File Inbox link:

3. Access the file by going to File Inbox from the navigation sidebar.



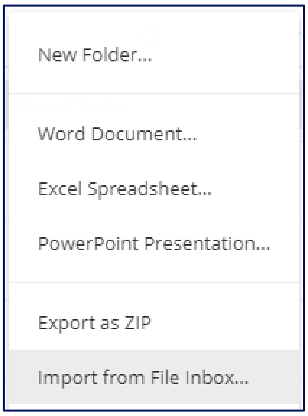
12.1 Importing files from the File Inbox

There are multiple ways to import files from your File Inbox. One method is direct from the File Inbox:

1. Click File Inbox on the sidebar.
2. Locate the email item which contains the files you wish to import.
3. Select the email to display the message body and a list of the attached files.
4. Select the files you wish to import.
5. Click Choose File Import Location to choose the desired destination zone. Choose the destination folder within that zone.
6. Click Save Changes to copy the file(s) to the selected location.

You can also access the File Inbox from within a zone. Files you import in this way will use the current zone as the import location, rather than giving the option to choose a destination zone and folder. To do this:

1. In the zone you wish to import the file into, click New – Import from File Inbox.
2. In the message box, choose the email that contains the attached file you wish to import.
3. Using the tick boxes, select the files you wish to import, then click Import Here. The file will be imported into the zone.



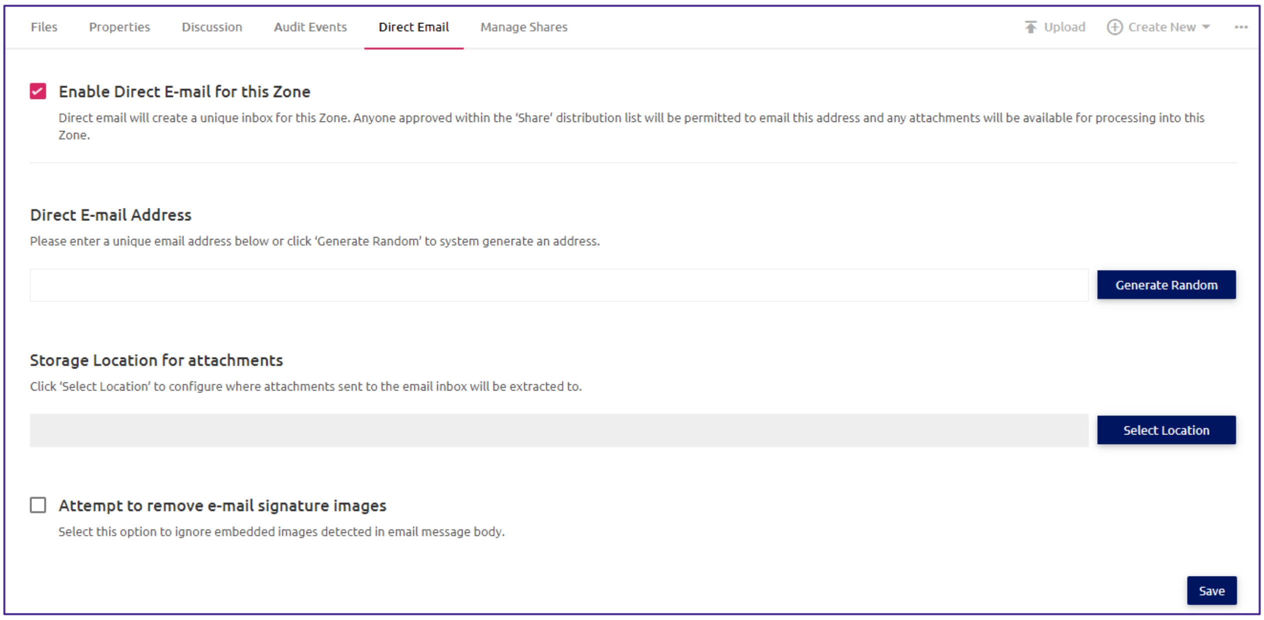
Note: Delete files from the File Inbox by pressing the delete icon.

12.2 Emailing files into a zone

As well as sending files to a File Inbox, you can send files directly to a specific zone. Do this by allocating an email address to a zone and choosing a destination folder. This can give all the permitted users of the zone the ability to upload files there via the dedicated address. This Direct Email feature is also an opt-in feature and so may not be available.

To email files into a zone:

1. Select the Direct Email tab in a zone.



2. Check the box to enable Direct Email for the zone.

3. Assign a unique email address to the zone or click Generate Random to have an email address created for you. If you choose to generate an email address it will provide a two-word phrase in the form email.name. The full email address when generating an email in this way will then be email.name@workspacename.egresscloud.com.

4. Click Select Location to choose the destination folder for your uploaded files.

5. To try and automatically prevent the uploading of small signature images from your email, check the Attempt to remove email signature images checkbox.

6. Click Save. You can now email files to your zone using the assigned address.

About Egress

Our mission is to eliminate the most complex cybersecurity challenge every organization faces: insider risk. We understand that people get hacked, make mistakes, and break the rules. To prevent these human-activated breaches, we have built the only Human Layer Security platform that defends against inbound and outbound threats. Using patented contextual machine learning we detect and prevent abnormal human behavior such as misdirected emails, data exfiltration and targeted spear-phishing attacks. Used by the world's biggest brands, Egress is private equity backed and has offices in London, New York and Boston.

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