

Egress Switch Secure Email

- Overview
 - Why use secure email?
 - The new secure email platform
- Installation
 - Windows
 - Mobile Clients
- Compatibility
- Special Settings
- Usage
 - Creating a secure message
 - Managing secure packages
 - Large file transfer

Overview

Why use secure email?

Email is used for many purposes, and is an important avenue by which information can be transmitted and received within and outside an organization.

The [State of Delaware Information Security Policy](#) requires that all data transmitted electronically be protected based on its data classification. The data classification system and the reasoning behind it is defined in the [State of Delaware Data Classification Policy](#) and [State of Delaware Data Classification Guideline](#). Any information with a classification above Public must be encrypted in transit, and some types of data must also be encrypted at rest. Email encryption is one means of applying the appropriate controls and protections to such data.

Examples of data that should be encrypted include:

- Social Security Number
- Employee ID
- Bank Account Number
- Credit Card Number
- Mother's Name
- Father's Name
- Place of Birth

If you have any questions about the classification of data, you should consult with your agency's Information Security Officer.

The new secure email platform

Egress Switch is the secure email platform chosen to replace the state's current Ironport solution. It allows us to send and receive secure emails both internally and with external 3rd party recipients. It also provides a large file transfer functionality that utilizes the same platform, and can also be used to create encrypted CDs and USB drives.

The software works by creating encrypted packages. The keys for these packages are registered with the key server, along with other information such as who is allowed to open the package. Any time a package is accessed, the key server is consulted to see if the access is allowed. These accesses, both allowed and denied, are recorded in the database, and the resulting audit trail is available in the user interface for all packages. This allows you to see who opened or tried to open a package, as well time/date and IP address of the computer accessing the package. The list of people who can open the package can be edited by the creator/owner at any time, allowing access to be added or revoked as desired in realtime.

There are desktop switch clients for Windows and OSX, and mobile clients iOS/Android mobile platforms. There is also a web interface creating/accessing secure packages.

The new system uses ADFS for authentication, which will allow us to better secure the servers, and will also allow us to provide better support for K12 and other non-state users.

Installation

The recommended way to send and receive secure emails is to install and use the client software. This software will be probably be managed and installed by your administrator via some kind of software distribution system such as SCCM or Group Policy.

The software is also available directly from Egress, but will require some additional configuration if installed outside of a managed environment.

Windows

Once the client is installed, several registry entries will need to be added to provide the client additional configuration information. The [.reg file attached to this page](#) can be used to manually update the registry, however for agency or department-wide installs, a configuration tool such as

group policy preferences would be the preferred method of distributing these registry settings to all clients. Once the client is installed and configured, it will automatically start whenever Outlook is started. You will see a small orange icon in the notification area that you can right-click to get access to some features and options outside of outlook.

Mobile Clients

Mobile clients need to be told the location of the Switch server and ADFS server. There is a link on the sign-in page of the app that pops up a config window where this information can be entered. The info needed is below:

Switch Server: securemail.delaware.gov

ADFS Server: adfs.state.de.us

Currently the iOS client does not support ADFS, however the updated client is expected to be released very shortly.

Compatibility

The Switch client is optimized for more recent versions of Microsoft Office, including Microsoft Office 2010 and Microsoft Office 2013, and will work best with those versions. If you have older version of Office, including Microsoft Office 2007, you will need to use an older version of the Switch client. This is available from the Egress website, and can also be managed via common software distribution systems. Please note that Service Pack 3 for Office 2007 is required if using Office 2007.

Special Settings

The Egress Switch servers use ADFS for authentication. This means that the client will be redirected to the state's ADFS servers to authenticate when the software starts. The software uses IE's proxy settings, so in order to provide the best experience it is highly recommended to have a proxy exception for adfs.state.de.us. Using the PAC file is the best solution, as this will happen automatically, but putting in a manual exception will also work if the PAC file isn't being used.

Usage

Egress has provided us with some documentation that is linked below. They also provide some videos that show how to use their secure email software. You can find links to all the videos at the following location:

<http://www.egress.com/online-tutorials/>

Below you can find some additional documentation with links to vendor-provided PDFs that do a great job of explaining the functionality of the product and how to use it.

Creating a secure message

The Switch client is integrated into Microsoft Outlook, so that will be the primary avenue for creating new secure emails and reading secure emails that have been sent. Please see the [attached PDF](#) for information on how to create a secure message using Outlook and the Egress Switch client software, or click the link below.

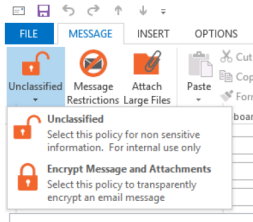
How to send a secure email in Outlook using Egress Switch

Egress Switch integrates seamlessly with Microsoft Outlook to provide one-click, easy-to-use email encryption.

1 Sending a secure email

Open a new message in Outlook, completing the 'To', 'Cc' and 'Subject' fields, and composing your message and attaching any files as normal.

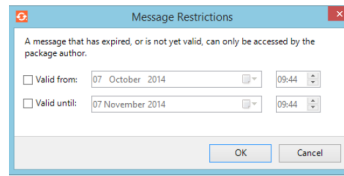
Outlook messages are 'Unprotected' as default. To send the email securely, click on the Switch dropdown menu and select 'Encrypt message and attachments'. Select 'Send' as usual once your message is complete.



1 How to send a secure email in Outlook using Egress Switch

2 Adding time restrictions (optional)

To add date and time restrictions, select the 'Package Restrictions' button. Tick the 'Valid from' and 'Valid until' boxes as required, using the drop-down menus to set the required date and time restrictions



Learn more about Egress Switch

Visit www.egress.com/online-tutorials for video tutorials on using Egress Switch, including how to:

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

Technical support

Should you encounter any problems with Egress Switch or have any technical questions, please get in touch with your Egress Technical Engineer or contact Egress Support at www.egress.com/support.

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Managing secure packages

There may be times when you want to see information about who has access or tried to access a secure package. You may also want to change some of the properties of a package, such as who can access it, or time/date restrictions. Please see the [attached PDF](#) for information on how to manage secure packages after perform these and other actions, or click the link below.

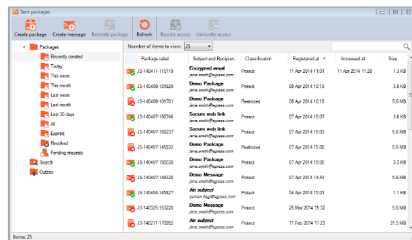
Managing information after it has been sent

Egress Switch allows you to view and manage the information you send in real time, even after it has reached a recipient, ensuring you remain in control of who can access information and how it is used.

1 Review your secure packages

Open the Switch Client and select 'Sent packages'. Double click on any package you wish to review.

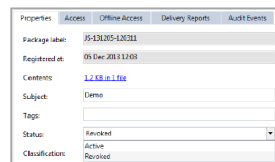
Note: Various filters are available on the left-hand panel, allowing you to filter by dates or package status.



1 Managing information after it has been sent

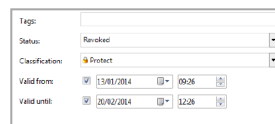
2 Revoking a package

In the 'Package properties' window, select 'Revoked' in the 'Status' drop-down menu. Click 'OK' to implement the change.



3 Adding and modifying time-based restrictions

To add or change time-based restrictions, tick the 'Valid from' and/or 'Valid to' boxes, using the drop-down menus to add the relevant dates to the package.



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Large file transfer

The secure email platform also includes a way to securely transfer large files. These files act largely the same as secure emails, and are created via the Switch client, just like a secure email. You can control access in the same way and perform the same basic operations. Please see the [attached PDF](#) file for more detailed instructions on how to work with large file transfers, or click the link below.

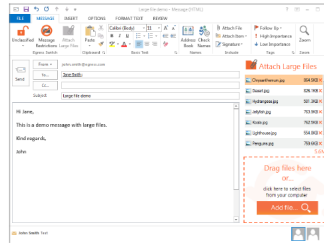
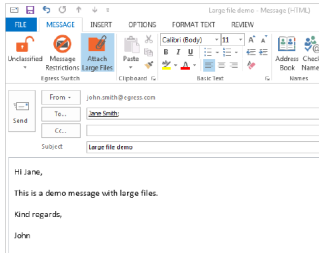
This will open the Large File Transfer sidebar on the right-hand side of the email you are composing. You can select files to attach by either dragging and dropping multiple files or manually selecting individual files from the 'Add file' button within the sidebar.

How to send large files securely

Egress Switch Secure File Transfer enables you to send large files securely by uploading them to hosted Cloud storage, either using the integrated Large File Transfer sidebar in Outlook or via the downloadable Egress Switch Client.

1 Using the Large File Transfer sidebar in Outlook

Open a new email in Outlook and select the 'Attach Large Files' icon.



Once you have finished composing your email and attached the required files, click 'Send' to securely transfer your files and email body using Switch.