



Safeguard Send User's Manual

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Welcome

Thank you for choosing the Safeguard Send Add-in, created by Sperry Software. This add-in has several safeguards that it checks before it allows the email to be sent.

Configuring the Add-in

Once the installation is complete, you are ready to use the Safeguard Send Add-in. When you open Outlook you will notice a new tab “Sperry Software” added to the Ribbon.

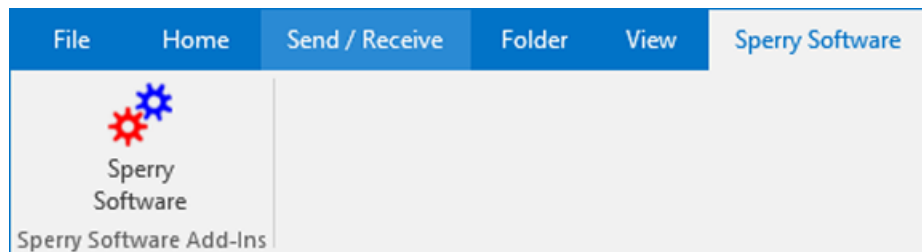


Figure 1 (Sperry Software tab on Outlook Ribbon)

Clicking the Sperry Software button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in’s functionality.

Safeguards tab

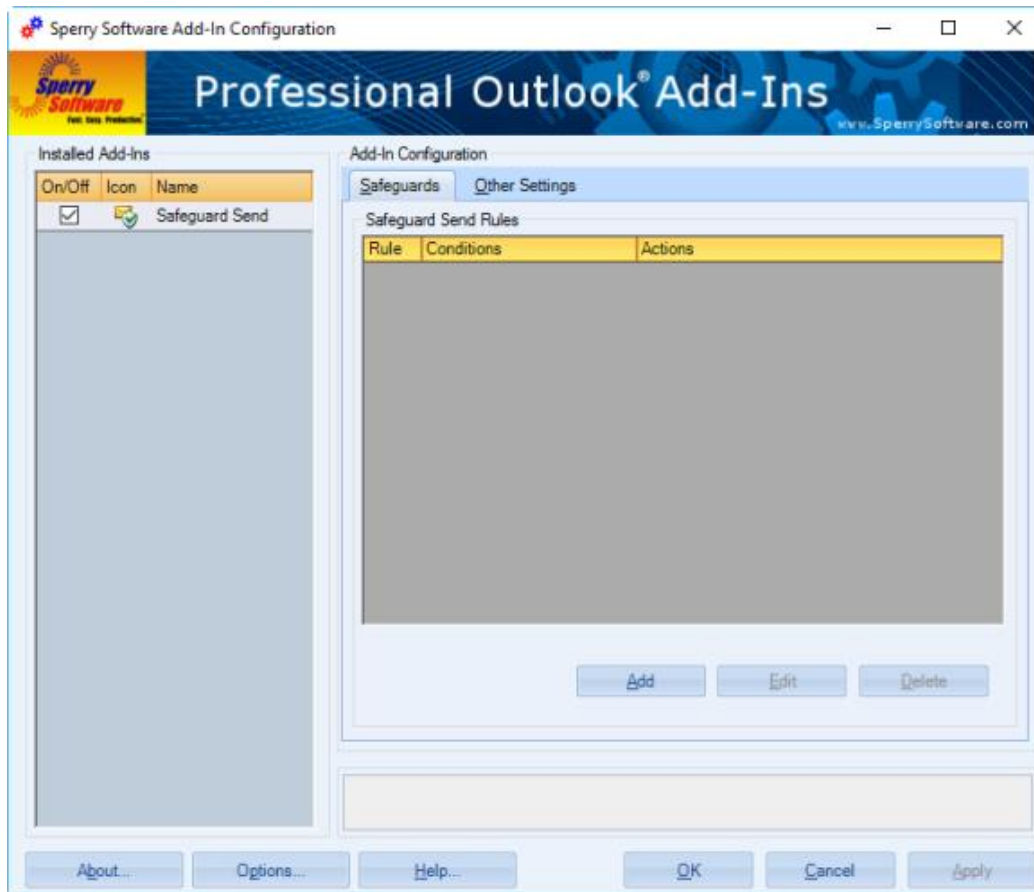


Figure 2 (Safeguards tab on the Safeguard Send Configuration window)

Conditions tab in the Add/Edit Rule dialog box

Use the right pane to define rules and conditions for this Add-in. Click the “Add” button to open the Add/Edit Rule dialog box.

The Add/Edit Rule dialog box makes it possible to define Conditions and Actions you want the Add-in to use when processing.

The Conditions tab lets you select which condition(s) will cause the Add-in to perform. You can use domains, email address, multiple domains, multiple recipients, or distribution lists. You can also specify domains that must match, contents of the From address, contents of the Subject, contents of the message body, contents of the body of an attachment, contents of the name of an attachment, a message that contains a definable number of attachments, or any sent email.

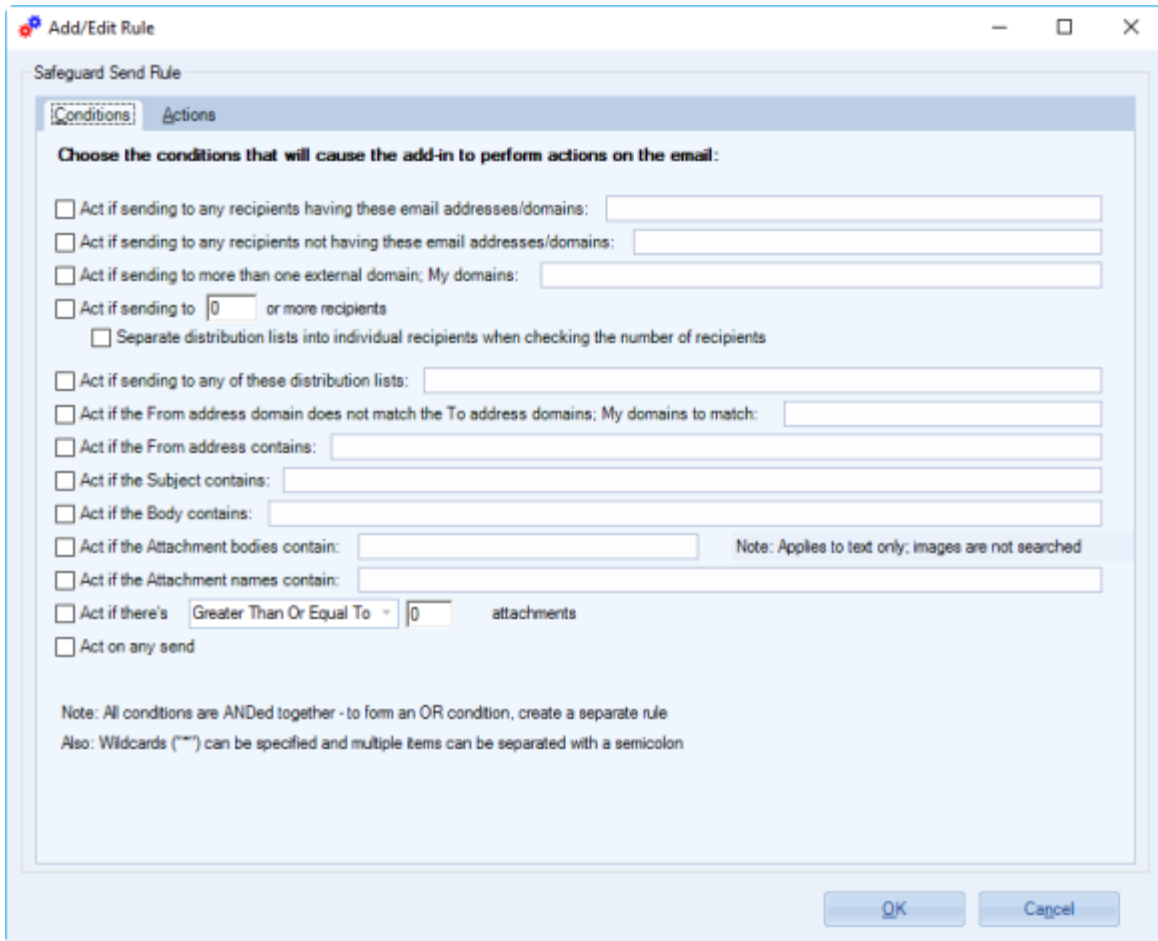


Figure 3 (Conditions tab in the Add/Edit Rule dialog box)

See the table below for a brief description of each Condition.

| Condition | Description |
|--|--|
| Act if having any recipients having these email addresses/domains: | The rule will be enacted if recipients have specified email addresses/domains. |
| Act if sending to any recipients not having these email addresses/domains. | The rule will be enacted if recipients do not have specified email addresses/domains. This is useful if you want an alert when the email is destined to go outside the company domain(s). |
| Act if sending to more than one external domain. My domains: | The rule will be enacted if the email is being sent to more than one specified external domain. This is useful to catch those emails that have the incorrect recipient (a mistake that usually occurs when using the arrows/tab key to cycle through recipients and the wrong one is accidentally selected). |
| Act if sending to ___ or more recipients. | The rule will be enacted if the email is being sent to a specified number of recipients. Additional |

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| | option to count distribution lists members as individual recipients. This is useful to warn users against sending to too many people all at once. |
| Act if sending to any of these distribution lists: | The rule will be enacted if the email is going to any of the specified distribution lists. This can be useful to warn users against using say, the GAL or other large corporate lists. |
| Act if the From address domain does not match the To address domains. My domains to match: | The rule will be enacted if the From and To address domains <i>do not</i> match those specified. This is useful to ensure the correct From address is specified (when there are one or more Outlook profiles present, this is a lifesaver). |
| Act if the From address contains: | The rule will be enacted if the From address contains the content specified. This is good for catching the wrong signature (when combined with the "If Body Contains" condition, below). |
| Act if the Subject contains: | The rule will be enacted if the Subject contains the content specified. This is useful for catching sensitive or classified keywords, including account numbers, project names, or items marked secret or nofor. |
| Act if the Body contains: | The rule will be enacted if the Body contains the content specified. This is useful for catching sensitive or classified information, including account numbers, project names, or items marked secret or nofor. |
| Act if the Attachment bodies contain: | The rule will be enacted if the Attachment bodies contains the content specified. It examines Office type files like Word documents, Excel Spreadsheets, etc. Similar to the "If the Subject Contains" and "If the Body Contains" conditions, this can be useful for catching information before it leaves your organization. |
| Act if the Attachment names contain: | The rule will be enacted if the Attachment names contain the content specified. This is useful for catching sensitive or classified keywords or phrases, including account numbers, project names, or items marked secret or nofor. |
| Act if there's (certain number of) attachments | The rule will be enacted if a specified number of attachments are present. It allows the warning to take place if there are less than, exactly, or greater than N attachments and cab be useful for alerting users that they are about to send information contained in an attachment; or |

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| | ensuring that they are sending the correct attachment. |
| Act on any send | The rule will be enacted on any sent emails. |

When you are finished making changes to the Conditions, click **“OK”**.

Pattern Matching In Conditions

Normally when trying to match for example, the Subject to a keyword you can just specify that keyword and you’re done. But what if you wanted to match on either of two words? In these cases, a semicolon can be used to separate your keywords. All condition fields accept the semicolon to separate keywords.

You can also use wildcards (“*”) to match partial words. This is particularly useful for example, when trying to match domains (so that all emails to or from a particular company match). And again, semicolons can also be used, for example: *sperrysoftware.com; *sperrysoftware.net will match any Sperry Software domains.

Finally, regular expressions can also be used. Regular expressions are a pattern matching language that can be used to match any kind of pattern in an email, for instance a match can occur if there are Social Security Numbers, credit card numbers, account numbers, telephone numbers, street addresses, email addresses, and many others. In the Safeguard Send add-in, regular expressions are accepted only in certain conditions. Those conditions are:

- Having a certain email address/domain name
- Not having a certain email address/domain name
- Subject
- Body
- Attachment Name
- Attachment (body)

While it is beyond the scope of this help file to provide support for regular expressions, an article describing how to setup the [add-in to search for Social Security Numbers in the email](#) and another on [how to setup the Safeguard Send add-in to search for credit card numbers](#) are available.

Actions tab in the Add/Edit Rule dialog box

Use the right pane to define rules and conditions for this Add-in. Click the “Add” button to open the Add/Edit Rule dialog box.

Use the Actions tab to determine which actions will be performed if the conditions are met. There are a variety of warning prompts from which you can select. Use the Standard, Simple, Grid, or HTML tabs to select the type of warning prompt you want. You can change the type of warning prompt by clicking the tab you want or you can click the prompt type from the Display list arrow at the top of the window.

The following Warning Prompt customizations are available in each of the four prompts:

- Use these buttons: Use the list arrow to select the prompt that will display when the action is taken
- Make button: Use the list arrow to select which of the buttons will be selected by default

- Message to display: Customize the message displayed when the action is taken

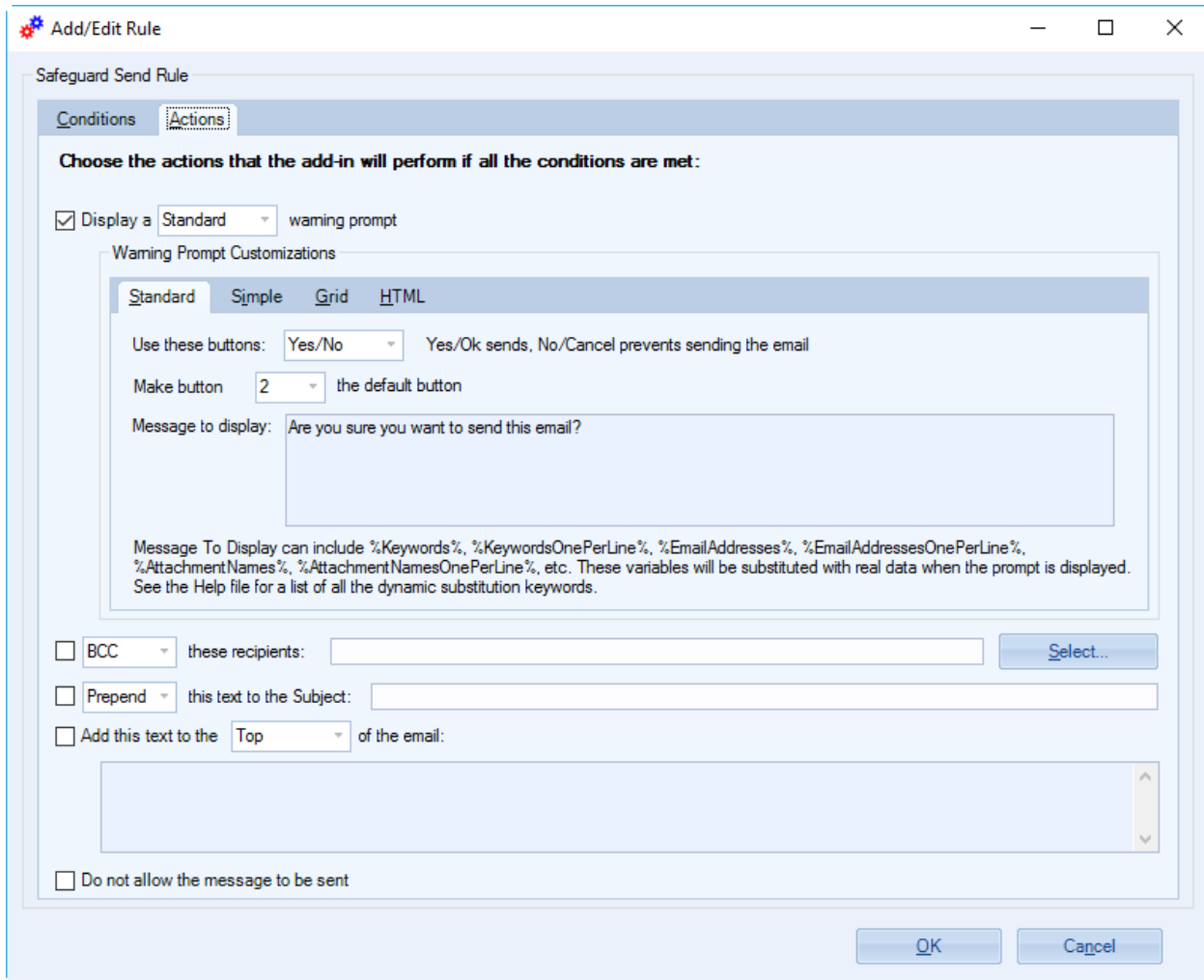


Figure 4 (Actions tab in the Add/Edit Rule dialog box)

See the table below for a brief description of each Action.

| Action | Description |
|-----------------------------------|---|
| Display a Standard warning prompt | Displays a warning prompt defined by the user. Variables are substituted with real data when the prompt is displayed. |
| Display a Simple warning prompt | Displays a warning prompt defined by the user. Variables are substituted with real data when the prompt is displayed. |
| Display a Grid prompt | Displays a warning prompt is defined by the user. Variable values are displayed in a grid. |
| Display an HTML prompt | Displays a warning prompt is defined by the user. Variable values are displayed in HTML format and can be edited. |
| BCC/Copy these recipients: | BCC or CC specified recipients. These can be selected from Outlook Contacts |

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| Prepend/Append/replace the text to the Subject: | Add specific text to the beginning, end, or as a replacement to the existing Subject text. |
| Add this text to the Top/Bottom of the email: | Add specific text to the top or bottom of the email. |
| Do not allow the message to be sent | This option prevents the message from being sent. |

If you are finished making changes to the Settings, click “**OK**”.

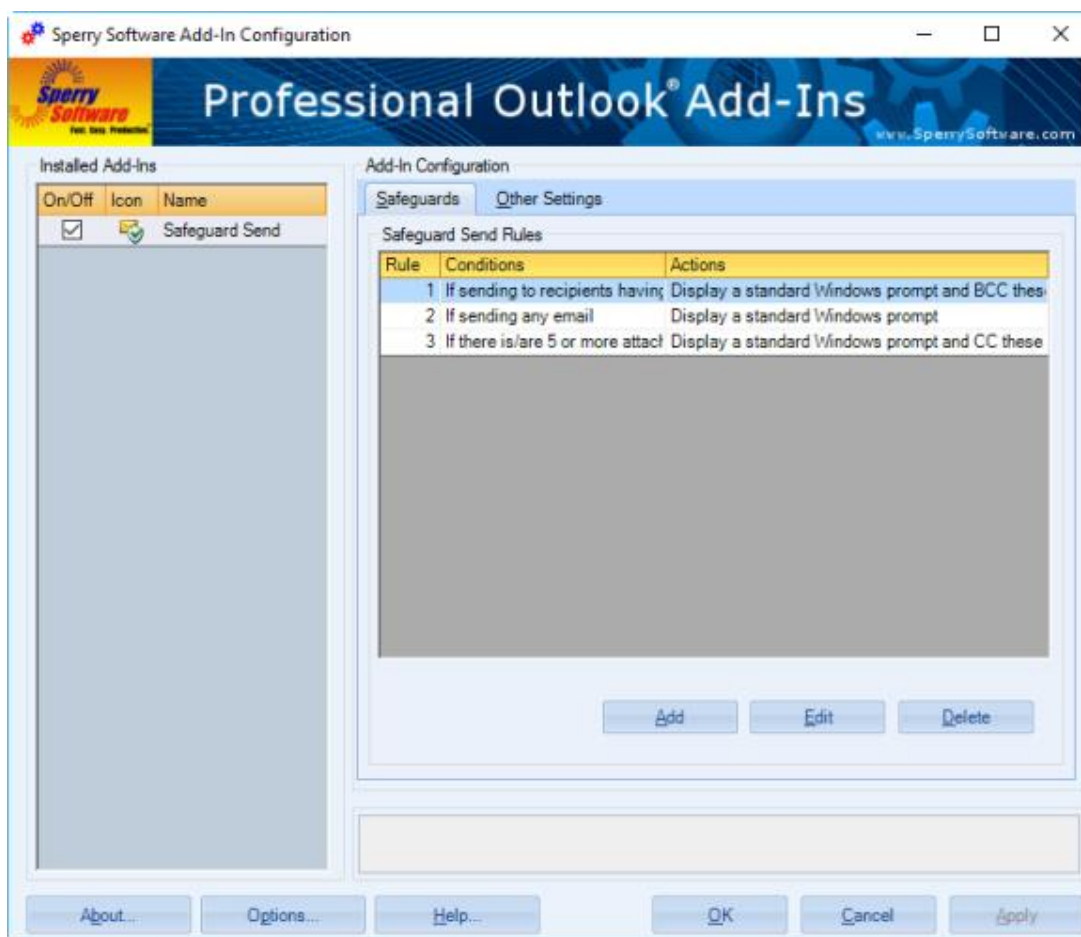


Figure 5 (Safeguard tab containing three rules)

Click the “**Add**” button to add a rule using the Add button on the Safeguards tab in the Configuration window. Edit or delete an existing rule using the Edit or Delete buttons at the bottom of the Safeguards tab in the Configuration window.

If you are finished making changes to the Settings, click “**Apply**”, then click “**OK**”. If you have more changes to make, click the tab for the Settings you want to change.

Other Settings tab

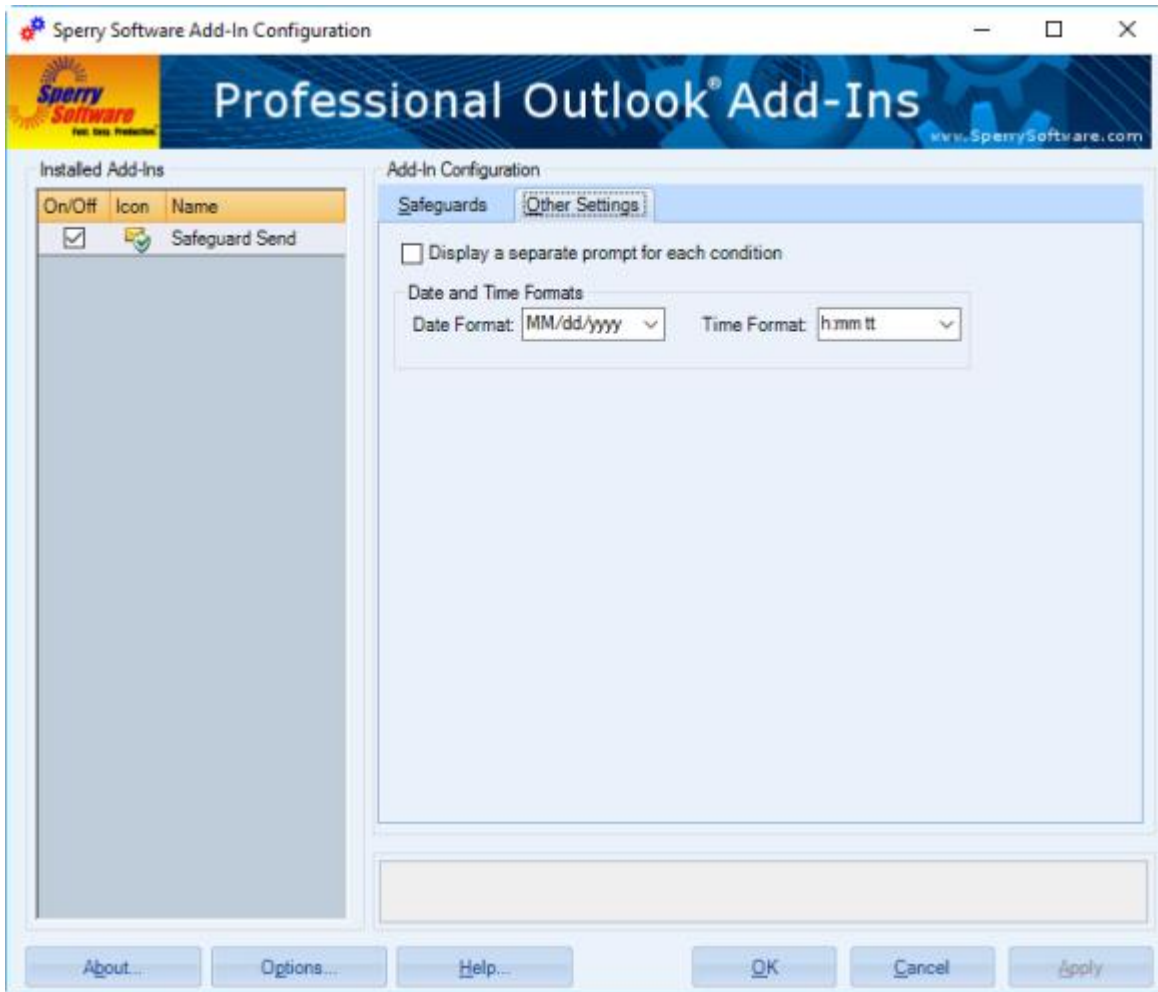


Figure 6 (Other Settings tab in Safeguard Send Configuration window)

The Other Settings tab is used to toggle on/off the display of a separate prompt for each condition. You can also change formats for the date and time.

If you are finished making changes to the Settings, click “**Apply**”, then click “**OK**”. If you have more changes to make, click the tab for the Settings you want to change.

Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. There could be several reasons for this. See this article to figure out how to resolve this problem:

<https://sperrysoftware.freshdesk.com/solution/articles/5000626926-i-installed-the-add-in-but-i-can-t-see-it-in-outlook->

Q. The “Sperry Software Add-ins” button does not pull up the Configuration window.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#) especially the FAQ about how to enter a bug report.