Safeguard Send

User's Manual
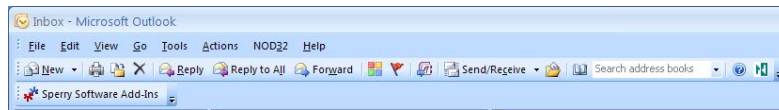
Welcome

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 Safeguard Send. When you open Outlook you will notice a new button "Sperry Software Add-ins" added to the toolbar.

Clicking this 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.

Confidentiality Safeguards Tab
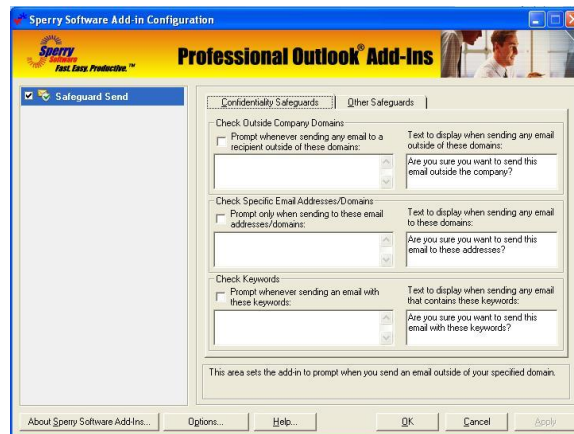
Check Outside Company Domains
First, it can help ensure that you don't accidentally send an email outside of your company domain that has confidential information. This is useful to allow you a chance to peruse the email one last time before it actually goes out.

To cause a prompt when sending emails outside of your domain, check the box that says "Prompt whenever sending any email to a recipient outside of these domains". Then place your company domain(s) in the box provided, one per line. You can use wildcards (an asterisk), e.g., *.sperrysoftware.com, or *sperrysoftware.com to match sub-domains like espanol.sperrysoftware.com as well. Finally, specify the text that you would like to see when any email is addressed to go outside of your specified domain. It will be necessary to restart Outlook when you turn this option on or off.

Check Specific Email Addresses/Domains

Second, it can alert you with a customizable prompt whenever you send an email to a particular email address, or to a particular domain. This can be useful in those situations where an important client's email must be dealt with special care. You can use wildcards here as well, or you can just specify the domain (e.g., sperrysoftware.com). Note that

Check Keywords

Third, you can set up the add-in to prompt you when it detects particular keywords. You specify the keywords, one per line, in the box provided. As with the other safeguards, you can use wildcards to match a wider variety of keywords. For instance, if you specify "cat" you will get a prompt if the email subject or body contains the word "cat" but not if it contains the word "category". However, if you specified "cat*" (note the wildcard) then you *would* get a prompt if the add-in saw the word "category" in the subject or body of the email.

Other Safeguards Tab
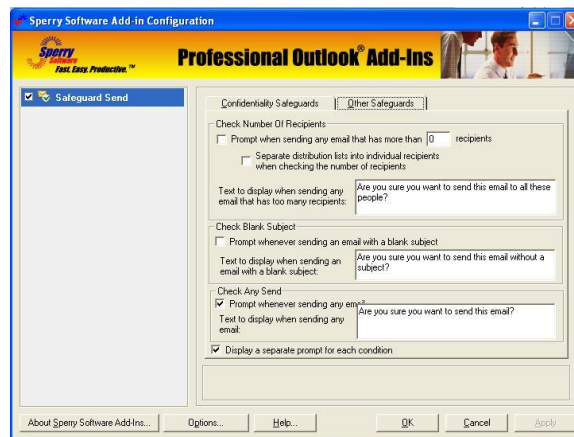
All of the above options pertain to the tab called "Confidentiality Safeguards" because they all have something to do with protecting the contents of the email in one way or another. The next tab, "Other Safeguards", pertain to sending email.

Check Number Of Recipients

Specifically, the fourth box is labeled "Check Number Of Recipients" and is used to alert you when you have a large number of people your email is being replied to (or sent to). You decide the definition of "a large number of people" by typing in a number in the field. Then when you go to send, the add-in counts the number of people and prompts you if it exceeds your threshold. Now, what happens if some of the addressees are a distribution list? That's up to you. To count distribution lists as 1 recipient, leave the box blank. If you check the box, the add-in will sum the members of the distribution list and then check it against your maximum.

Check Blank Subject

The next safeguard is labeled "Check Blank Subject" and it will prompt you when you send or reply to an email with no subject specified. This option is important because most email clients will give a higher spam score to your email if it does not contain a subject. However, more important than that, it is

essential to provide a concise subject for your recipients so that they are not forced to open your email just to see what it is about.

Check Any Send
The last safeguard is used to cause a prompt whenever any email is sent (or replied to) from you. Turning on the option gives you a moment to think before the email actually goes out and will give you an opportunity to cancel it and go back to editing it instead.

Separate Prompts Wanted
Note that there is one final checkbox at the very bottom of the window called "Separate Prompts Wanted". If you violate more than one of any of the above safeguards, there are basically two ways to have the add-in prompt you. You can either have each prompt come up in its own window, in serial order, and you click yes/no on each one (the default), or you can have all the safeguard violations show up in a single window, one per email message.

Troubleshooting

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

A. The add-in may have become disabled.

> **For Outlook 2002, 2003 users:**
> On the Outlook Menu, click Help…About Microsoft Outlook
> Click the "Disabled Items" button
> If "Sperry Software" is listed, enable it and restart Outlook
>
> **For Outlook 2007 users:**
> On the Outlook Menu, click Help…Disabled Items
> If "Sperry Software" is listed, enable it and restart Outlook

> The Sperry Software toolbar may not be set to "Visible"
> On the Outlook Menu, click View…Toolbars and make sure that Sperry Software is checked.

Q. The "Sperry Software Add-ins" button does not respond.

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.