mSafe Quickstart Guide

Share files quickly and securely
with **mSafe** of Motiv ICT Security

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MOTIV ICT Security

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You will be working with mSafe: a product of Motiv ICT Security, with which you can securely share files. This document explains how mSafe works.

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What is mSafe?

- ✓ An IT product in the cloud that allows you to securely share confidential files.
- ✓ With mSafe you can share all common types of files: Word, Excel, PowerPoint, PDF documents, etc.
- ✓ You can share files with your colleagues, but also with external parties (people from outside your organization). mSafe is built for B2B use, so for the business market.
- ✓ Files that you share via mSafe can be up to 100 GB in size.

For a description of the most important mSafe terminology, see APPENDIX A: Glossary mSafe (A-Z)

How do you open mSafe?

mSafe is always opened in an internet browser (for example: Microsoft Edge, Mozilla Firefox or Google Chrome). Your organization has purchased its own URL (web address) for mSafe. You can find this URL in the email you receive from mSafe. If you click on this URL, you will automatically open the correct website. mSafe then asks you to log in (once, or every time - depending on your organizations configuration of mSafe).

If you have not received emails and you don't know the URL, ask your IT administrator for help.

What is mSafe *not* intended for?

mSafe is – for safety reasons – **not** meant for:

- × Store files for a longer period of time.
- × Archive files.
- × Create a history archive.

All information on mSafe has a so-called '**retention time**'. This means that the information will be automatically deleted on a specific date. Then the information cannot be retrieved anymore, not even by the IT administrator.

You can think of mSafe as a 'channel' for sharing information - temporarily. The platform is intended to transfer files from A to B safely. Not to store files permanently.

For how long is the information stored on mSafe?

Your IT administrator has set a default retention time (retention period) for storing information on mSafe. As a result, your information is automatically removed from the platform after, for example, a month. The retention date can be seen in a share and in the "My shares" overview.

The retention time for files and shares can differ per organization. To give an impression: the default retention time for a Temporary share is 30 days. Your IT administrator may deviate from this. Please ask your administrator what the settings are for your organization.

Why is mSafe safe?

mSafe is developed by Motiv ICT Security. We have secured the platform in the following ways:

- ✓ mSafe is a Dutch product, hosted on Dutch data centers.
- ✓ mSafe offers strong authentication. This means that the identity of the sender and the receiver are being checked and confirmed. This is done via email address and password, and optionally via SMS ('two factor verification').
- ✓ mSafe provides automatic malware detection and virus scanning on all files.
- ✓ The activities on mSafe are traceable and can be checked via logging and reporting.
- ✓ All files are encrypted (256-bit AES encryption and 2048-bit RSA and SHA-512 algorithms).
- ✓ mSafe is certified with ISO 9001, 20000, 27001 and NEN7510.

In which three ways can you share a file using mSafe?

You will probably use the first two ways the most.

1. For the user: **share with a person**: fast one-to-one sharing of files;
2. For the user: **mSafe share**: a 'channel' for a fixed team to periodically share files. We distinguish between Temporary shares (with retention time on documents and share), and Permanent shares (with retention time on documents, but not on the share itself).
3. For the IT administrator: **mSafe Connect (API)**: documents from other applications can be automated and securely shared via our mSafe API. More information about the mSafe Connect (API) can be found in the product sheet regarding this topic (you can request one to your Motiv account manager).

What is the difference between sharing with a person and sharing in shares?

The purpose of **sharing with a person** is to quickly share one or more files with one person.

ⓘ SHARING WITH A PERSON: AN EXAMPLE

The HR advisor wants to send an offer to a candidate. Instead of using email, the HR advisor opens mSafe and drags the document with the offer to the mSafe upload box. He adds the candidate to mSafe by clicking 'share with a new contact' when selecting a person. He fills in the candidate's contact information and clicks on 'Save'. The candidate will then automatically receive an e-mail with login details for mSafe, including the notification to download the document with the 'Offer'.

She can download the file up to and including the retention date (for example, 7 days after upload). After the retention date, the document is automatically deleted. Thanks to virus and malware scanning, file encryption, two-step verification (additional verification via SMS) and the automatic retention time, this process is much safer using mSafe compared to sending by email.

The purpose of **shares** is to share one or more files with a 'permanent' group of people. This 'permanent' group can be: people from partnering companies with whom your organization has been working for a longer period of time.

SHARING VIA A MSAFE SHARE: AN EXAMPLE

The Purchasing Department works together with two (external) suppliers: supplier A and supplier B. Purchasing creates a separate share for supplier A, and a separate share for supplier B. If Purchasing updates the Purchasing Conditions, this document will be placed in both shares. Supplier A downloads the document and stores it in its own environment. Supplier B does the same. When the mSafe retention time has expired, the documents are automatically removed from the shares.

What is the difference between a Temporary share and a Permanent share?

Temporary share	Permanent share
Share **has a retention time**, so it is automatically deleted after a specific date.	Share has **no retention time**, so it is not automatically removed.
Share can be **created** by an Employee.	Share can only be created by the mSafe company administrator. An exception can be made to this: your organization may decide that Employees can also create Permanent shares. In that case, the same rules apply to creating and deleting as to Temporary shares.
Share can be **removed** by the Share Administrator.	Share can only be **removed** by the mSafe company administrator. An exception can be made to this: see above.
Share always has an Administrator	A Permanent Share may **not have an Administrator**. This is the case if an mSafe company administrator has created the Permanent share (and Employees are not entitled to create a Permanent share themselves).
mSafe company administrator cannot see the contents of the documents in the share.	**mSafe company administrators cannot see the contents of the documents in the share.** This also applies if the mSafe company administrator is the person who created the Permanent Share. The mSafe company administrator can only see the contents of the files if he / she adds himself as an Employee in this share on purpose.
Documents in this share have the same retention time as the share itself, thus they are automatically removed after a specific date.	**Documents in this share have a standard retention time of 30 days.** The share is therefore not automatically deleted, but the documents in it will be.
Share can be manually removed by the Share Administrator at any time.	Share can be manually removed at any time by an mSafe company administrator.

What roles and permissions are applicable in mSafe?

Role	Permissions	Remarks
mSafe company administrator	Is permitted: • Add users to mSafe (unless ADFS is used - then user management is managed in Active Directory). • Determine the standard retention time for sharing with a person (this is set by Motiv for you). • Determine whether the retention time of shares may be extended (this is set by Motiv for you). • Determine whether the retention time of files in permanent shares may be extended (this is set by Motiv for you). • Determine whether folders can be created inside shares (this is set by Motiv for you). • Determine whether Participants may remove documents from permanent shares (this is set by Motiv for you).	The mSafe company administrator is usually a member of the ICT department, or a security officer.
Administrator (of a share)	Created the share. Has permissions to: • Add users to a specific share (including external users, 'Participants'). • Change the name of the share. • Adjust the share's retention time (!). • Determine whether or not Participants (= 'externals') may also upload documents. • Determine whether or not Participants are allowed to delete files in case it's permitted at company level. • Add a personal invitation text for new users. • Determine the type of share. • Remove the share. • View the action log of the share. The action log is an overview of all activity in this share (for example: colleague X uploaded a document on date Y). • Add documents to the share. • Remove documents from the share. • Download documents from share. • Create a folder within the share (if allowed by the Administrator).	If you create a Temporary share, you automatically become the Administrator of this share. Permanent share does not have an Administrator, technically.
Employee	An Employee is an ('internal') member of a share, and is permitted to: • View the action log of the share. The action log is an overview of all activity in this share (for example: colleague X uploaded a document on date Y). • Add documents to the share. • Remove documents from the share. • Download documents from the share. • Create a folder within the share (if permitted by the Administrator).	The Employee works at the organization who purchased mSafe.

	An Employee can be appointed as Administrator by the Share Administrator. In that case he / she can do the same as the Administrator can.	
Participant	A Participant is an ('external') member of a share, and is permitted to, among other things: • View the action log of the share. The action log is an overview of all activity in this share (for example: colleague X uploaded a document on date Y). • Add documents to the share. • Depending on the management settings: remove documents from the share. • Download documents from the share. • Create a folder within the share (if allowed by the Administrator). The Participant cannot be appointed as Administrator. Furthermore, a Participant has the same permissions as the Employee (with the possible exception of: Deleting documents. The Administrator can prohibit this at a central level). Important: Participant accounts are always temporary accounts. A Participant account is automatically removed from the mSafe environment when no more files or shares are shared with him / her.	The Participant works for an 'external' organization (a partner or customer) or is a private contact person. The Participant account is always a temporary account.

What happens to a share if the account of the only Administrator of a share is deleted?

If a share's Administrator account is removed from mSafe (for example, because this person joins another organization) and no second administrator is appointed in the share, the share - including all content - is automatically deleted. All shares and documents that were linked to the Administrator account in mSafe are automatically deleted. For security reasons, this content cannot be retrieved afterwards.

Why do I (sometimes) have to enter an SMS code in mSafe?

Entering an SMS code is part of the so-called 'two-step verification' in mSafe. The 'two steps' refer to the following two actions:

1. You must verify your identity with your username (email address) and password.
2. You must verify your identity with an SMS code (via mobile phone).

The second step is an additional safety measure. This way you can be extra sure that only the correct person can access important information. The use of the SMS code is therefore an additional security measure.

Depending on the settings of your organization, you sometimes set Step 1 and Step 2, sometimes only Step 1, and sometimes you don't even have to log in at all.

For mSafe company administrators

What are the default settings for mSafe?

As an organization you can set your preferences for a number of settings. The company Administrator takes decisions (in consultation with the Motiv ICT Security Service Desk if necessary). For your information, below are some important default settings in mSafe.

a. **Show user's email address in mSafe** = Yes.
   If this setting is set to 'No', the users in the share will only see the person's name (not the email address).

b. **Language** = Dutch.
   Alternative is: English.

c. **Maximum retention time for sharing with a person** = 5 days.
   This can be deviated from. Motiv advices however to keep the retention time short (for safety reasons).

d. **Maximum retention time for Temporary shares** = 30 days.
   This can be deviated from. Motiv advices however to keep the retention time short (for safety reasons).

e. **May the retention time for *Temporary Share*s be extended by Administrators** = No.
   If this setting is set to 'Yes', Administrators can change the date on which their share expires. If it is set to 'No', the maximum share retention time is as described under point d. the final end date (cannot be changed).

f. **May the retention time for files in Permanent Shares be extended by Administrators** = No.
   If this setting is set to 'Yes', Administrators may change the date when files in the Permanent Share expire. If it says 'No', the maximum retention time of the documents is 30 days. Note: this concerns the files in the Permanent share, not the share itself. The Permanent Share itself is not automatically removed.

g. **May folders be created within shares** = No.
   If this setting is set to 'Yes', Administrators, Participants and Employees may create a new folder in any share. Such a folder is similar to a folder on your local computer (which you can see via Windows Explorer).

h. **Can Participants Remove Documents from Permanent Shares**? = No.
   If this setting is set to 'Yes', Participants (= 'externals') may remove documents that are in a Permanent share.

i. **Settings for notifications** (= automatic notifications by e-mail, from mSafe).
   - *How often*? (Immediately / Twice a day / Not)
   - Send notification when a new document is added? (Direct / Not)
   - Send notification when new participants have been added? (Direct / Not)
   - Send notification when the share retention date is almost reached? (Twice a day / Not)

- Send notification when the retention date of document(s) in a permanent share has almost been reached? (Twice a day / Not)

Does mSafe have additional optional functionality, besides file sharing?

Yes, the following optional modules will be available at the end of 2018.

- ✓ **mSafe Outlook Connect**: send attachments directly from your Outlook mail - but safely. More information about the mSafe Outlook Connect can be found in the product sheet on this topic (you can request this via your Motiv account manager).
- ✓ **mSafe Sign**: digitally sign and send digitally registered mail. More information about the mSafe Sign can be found in the product sheet on this topic (you can request this via your Motiv account manager).
- ✓ **Security Monitoring Service**. The experts from Motiv's SOC (Security Operations Center) monitor your environment and advise you on possible security measures.

Would you like to receive more information about these extra modules? Feel free to contact the Sales department of Motiv ICT Security by T +31 (0) 30 68 77 007 or info@motiv.nl.

Do you still have mSafe user questions?

Please contact the Motiv ICT Security Service Desk by T +31 (0) 30 68 77 005 or servicedesk@motiv.nl

Thank you for using mSafe!

https://www.motiv.nl/

Appendix A: Glossary of mSafe (A-Z)

mSafe company administrator = The administrator of the mSafe platform can change mSafe settings for the entire organization. For example, an administrator can determine what the standard retention time is, add users, determine whether folders can be created, etc. The Administrator is usually a member of the ICT department.

Participant = The Participant is someone who can download (and possibly upload) documents in mSafe, at the invitation of an Employee. From the Employee perspective, the Participant is 'external'. This means: the Participant does not work for the same organization as the employee, but is, for example, a partner or customer of the Employee.

Administrator = the person who created a share is the administrator of that share. He / she can add other participants to this share and configure the settings for that share (within the boundaries that are set by the organization).

Employee = In the mSafe context, an Employee is someone who works at the organization that has purchased mSafe. The Employee can take the initiative to share a document via a share or directly with a person, with an external party (for example a partner organization or a customer). This external party then becomes a 'Participant' in mSafe terminology.

Permanent share = a permanent share has no retention time. That is to say that the share itself remains available 'forever'; it is not automatically deleted. However, the documents that are in the permanent share do have a retention time. The standard retention time for these documents is 30 days. Of course, documents or permanent shares can be removed manually earlier, if this is desirable.

Retention time = maximum period that a file or share is stored on mSafe. The file / share is kept until the retention date. For example: if the retention date is June 1st, then the file / share will be viewable and downloadable up to and including June 1st. This is no longer possible on June 2nd. The file / share cannot be retrieved anymore; it's really gone.

Temporary share = a temporary share has a retention time. That is to say: a date has been set when the share is automatically removed. This date can be viewed via the share settings (gear wheel at the top right). All documents in this share have the same retention time as the share itself. Of course, documents or temporary shares can be removed earlier manually, if this is desirable. The Administrator can set the default retention time for temporary shares from a central level. And he / she can determine whether Administrators may deviate from this default retention time.

Share = space on mSafe in which you can share documents with specific people (for example: your manager, or your department). Shares can be "Temporary" or "Permanent". See above.