

Secure Workspace Overview

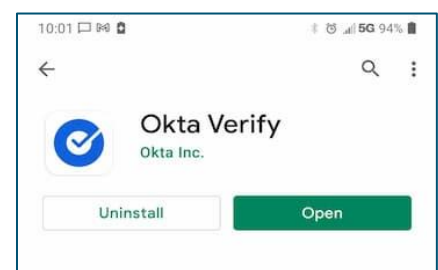
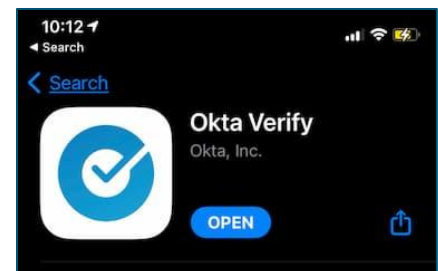
WECC's Secure Workspace is a file transfer program that allows employees to send large files and folders to stakeholders. The workspace requires **two-factor authentication** through Okta. Before receiving a file, external stakeholders must log in to WECC's Secure Workspace.

Account Setup

1. Stakeholders must have a wecc.org account to access the workspace. You can sign up for a wecc.org account by following the instructions below.
2. Go to <https://secureworkspace.wecc.org> using Chrome, Firefox, Edge, or Safari. Internet Explorer is not supported.
3. At the Okta login screen, enter your WECC website credentials.
4. You will be asked to set up a security image. Choose an image, then click "Create my account"
5. If you receive an error that you have not been assigned the application in Okta, please email support@wecc.org.
6. Set up multifactor authentication.

Mobile application

- a. Under "Okta Verify" click "Setup."
- b. Select device type (iPhone or Android).
 - i. If you are on a mobile device, click the link to download the app. It should pull up Okta Verify in the app store. If not, go to the device's app store and type "Okta Verify."
- c. Launch the app on the phone. Click the plus (+) sign in the top-right corner to add a new account. Tap "Organization" account type.
- d. Click "Scan a QR Code."
- e. In Okta on a web browser, click "Next" and scan the QR code.
- f. Click "Finish" or set up more factors.



SMS authentication

- a. Click "Setup" under SMS Authentication.

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- b. Enter a phone number that can receive SMS text messages.
- c. Click "Send Code." A code will be sent to that number.
- d. Enter the code in the "Enter code" field.
- e. Click "Verify," then click "Finish" or set up more factors.

Voice Call Authentication

- a. Click "Setup" under Voice Call Authentication.
 - b. Enter the phone number to which you wish to receive voice calls.
 - c. Click "Call." You will receive a phone call to that number.
 - d. Enter the code provided in the "Enter Code" field, then click "Verify."
 - e. Click "Finish" or set up more factors.
7. Once you are logged in to the Secure Workspace, you have created your account and can now receive and send files as needed.

WECC.org account setup

Step One:

To get credentials for the WECC website, go to WECC's homepage (www.wecc.org), and select "Login" at the top-right.

Step Two:

From the drop-down, select "Request Login."



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This generates a form that you must complete. Ensure that you click “I would like to request Secure Workspace access to securely send / receive file to / from WECC employees.”

Request Login

Confirm Email Address

Address 1

Address 2

City

State

Zip/Postal Code

Country/Region

I am an employee of a WECC member.

I am an employee of a NERC Registered Entity.

I am a Market Function Employee as defined by the FERC Standards of Conduct.

I would like to initiate the Confidentiality / Non-Disclosure Agreement (NDA) process because I need access to non-public information as set forth in the [WECC Information Sharing Policy](#).

I would like to request Secure Workspace access to securely send / receive files to / from WECC employees.

Register

Step 3:

Upon submission of the form, you will receive an email requesting that you log in with your temporary password. At the login screen, use the temporary password provided to you via email.

WECC Account Request Verification Inbox

WECC Administrative Services <support@wecc.org> 10:56 AM (17 minutes ago) ☆ ↶ ⋮

to username@company ▾

Dear,

Your request to use [username@company](#) as your username and associated email for a new WECC account has been received. Please continue setting up your account by signing in and resetting your password.

Username: [username@company](#)
Temporary Password:

[Sign In](#)

WECC requires email verification on all new email requests for use with a WECC account. Email verification is required prior to logging into your WECC account. If you did not initiate a request for a new WECC account, please contact us.

WECC Stakeholder Services

↶ Reply ↷ Forward



Secure Workspace Account Setup



WECC

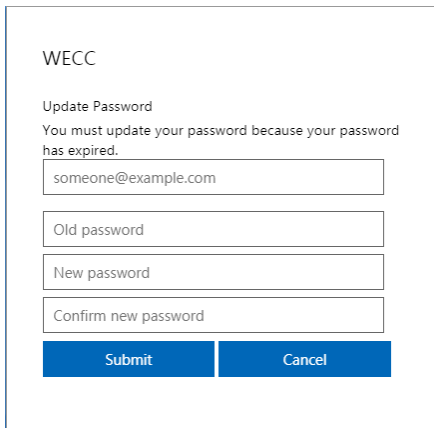
Sign in

someone@example.com

Password

Sign in

You will then be asked to change your password. Enter the temporary password in the “Old Password” field.



WECC

Update Password

You must update your password because your password has expired.

someone@example.com

Old password

New password

Confirm new password

Submit Cancel

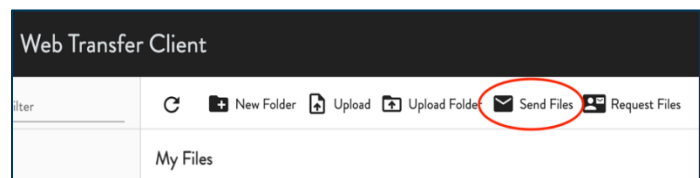
After completing this step, you should be able to log into the WECC website with your new password.

Secure Workspace User Guide

Once you have set up multifactor authentication, you will be able to access the Secure Workspace. Use your WECC credentials to log in at <https://secureworkspace.wecc.org>.

To Send a File:

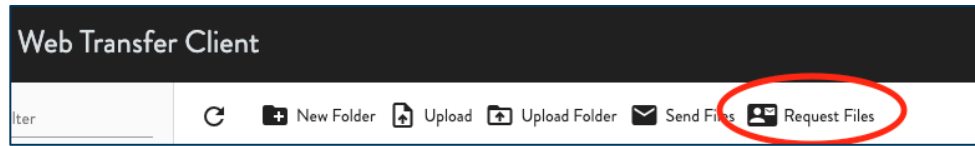
1. Click “Send Files.”
2. Enter a WECC employee’s email in the “To” field.
3. Enter a subject.
4. Write a message. The message can be sent securely if the box is checked. This will require your recipient to log in to see your message.



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5. Click "Upload" and select the file you want to send.
6. Click "Options."

- a. "Delivery Notifications" allows you to select when/whether you are notified once the file you are sending is downloaded.



- i. "Notify me immediately" will send you an email as soon as the file is downloaded.
 - ii. "Daily Digest" will send you one email per day for all files sent by this method.
 - iii. "Don't notify me" will not send any notification.
 - b. "Message Expiration" allows you to control how long the message is available for download.
 - i. "Immediate" will cause the message to expire immediately when all recipients have downloaded the file. Otherwise, the message will expire in 14 days if the recipient has not downloaded the file.
 - ii. "One day" will set the message to expire 24 hours after it is sent, regardless of whether the file was downloaded.
 - iii. The date is a rolling 14-day expiration, which is the maximum allowed. The file will expire 14 days after it is sent, regardless of whether the file was downloaded.
 - c. You can also select "Save as Default," which will save your settings for the next time you send a file.
7. Once finished, click "Send." Your recipient will get an email saying you sent them a file.

To Request a file

1. Click "Request Files."
2. Enter a WECC employee's email address in the "To" field.
3. Enter a subject.
4. Compose a message. The message can be sent securely if the box is checked. This will require your recipient to log in before they see your message.
5. Click "Options."
 - a. "Message Expiration" allows you to control how long the message is available for download.
 - i. "Immediate" will cause the message to expire immediately when all recipients have downloaded the file. Otherwise, the message will expire in 14 days if the recipient has not downloaded the file.
 - ii. "One day" will set the message to expire 24 hours after it is sent, regardless of whether the file was downloaded.



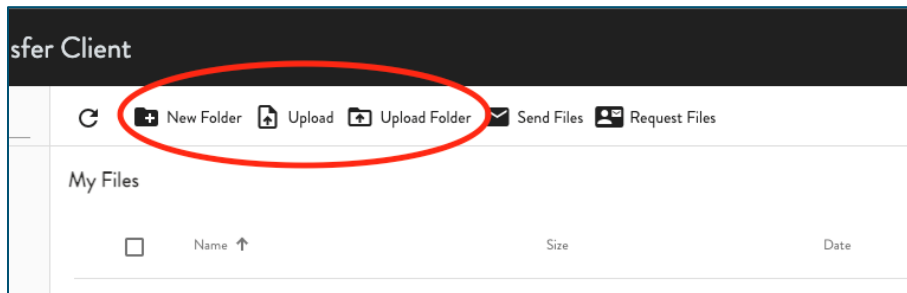
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- iii. The date is a rolling 14-day expiration, which is the maximum allowed. The file will expire 14 days after it is sent, regardless of whether the file was downloaded.
 - b. Optionally, you can select “Save as Default,” which will retain your settings for your next file send.
6. Once finished, click “Request.” Your recipient will get an email notification that you have requested a file, and once the file is sent, you will get a notification that the message is ready for you. The maximum retention period is 14 days, so make sure you retrieve your file before then.

File Repository

Upon login, you will see this icon and text:

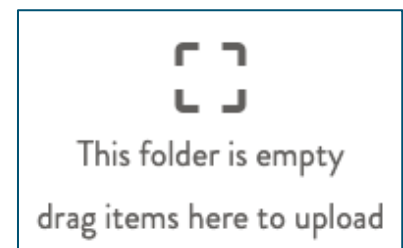
- This is your personal file repository. Files uploaded here will **not** be sent to WECC employees unless you follow the “Send Files” procedure above. This folder is monitored, and has a seven-day retention policy. All files will be deleted seven days after upload.
- You can upload individual files by dragging them into this page, or by clicking the “Upload” button at the top. You can upload a folder by clicking “Upload Folder.”
- You may create new folders using the “New Folder” icon. The folders will remain; however, any files contained within the folder will be deleted after seven days.



Viewing Messages

On the left side of the screen, you will see a “Received Messages” and “Sent Messages” link.

- “Received messages” shows any messages that have recently been sent to you, who sent them, the subject, body, filename(s), and expiration. You can click on the row to view them one at a time, as well as download the file that was sent. Upon expiration, the row will be deleted.
- “Sent messages” shows active file transfers you have recently sent, the date, recipients, subject, body, filename(s), and expiration. You can click on the row to view detailed information as well as download the file you sent. Upon expiration, the row will be deleted.

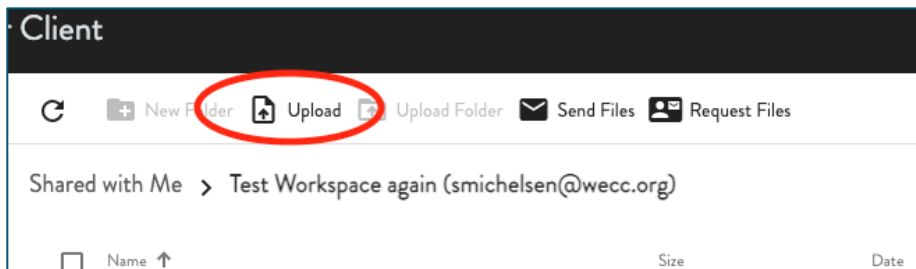


Collaboration Folders

If you have been invited to a collaboration folder, you can view it under the “Shared with me” link. Here, you can view all your collaboration folders. Selecting the checkbox next to the folder will allow you to view the details of the workspace.

- “Recipients” shows who has access to the folder.
- “Comments” is an open field where users can add comments to the folder. You can see other user’s comments here as well.
- “History” shows a log of files that were uploaded, downloaded, or deleted from the workspace.
- “Notifications” allows you to configure emails you get from the workspace. You can choose to get a daily or immediate notification when files are added, downloaded, renamed, deleted, or comments are added.
- “Expiration” shows the current date the workspace is scheduled to expire. Note that files may have separate retention policies outside the folder expiration.

Depending on your permissions, when you are added to a workspace, you may have the ability to upload a file. To do so, you may either click the “Upload” button, or drag and drop your file into the workspace.



Files uploaded to the workspace will be visible to *all* workspace users and may be subject to separate retention policies outside of the workspace expiration.

