Spirion Installation and Setup Instructions for Windows

Spirion is an application that scans for sensitive data on Windows or MAC computers. Spirion helps USU employees locate and secure sensitive data on their computers. Spirion is an important component of data protection at the University, reducing data exposure and data leakage.

Spirion Installation

Please follow the instructions below to install the Spirion client on your computer. If you do not have admin privileges and are unable to install new applications to your machine, contact your local IT support personnel for assistance. Ensure you are using a USU Network or the USU VPN to download the Spirion software.

1. On the computer you would like Spirion installed, visit the Knowledge Article titled Spirion @ USU.

   You will now download the Spirion client. The client allows communication between your machine and the main USU Spirion console.

2. In the Knowledge Article, under the heading *Where can I find Spirion,* click **Windows Software Download**.

3. After the installation file (USU-Spirion.msi) has downloaded, click the file in the Download pane (lower left corner of screen) or in the Downloads folder.
   a. You may receive a security message similar to the message shown on the right. If the message appears, click **More info** and then **Run Anyway**.
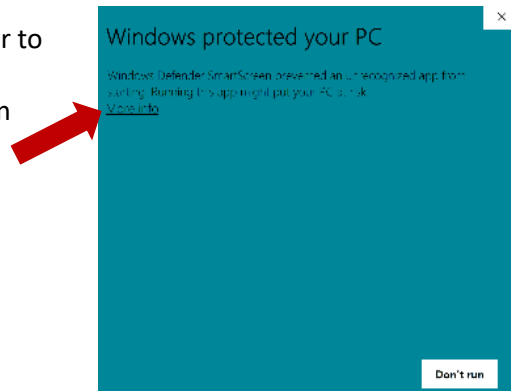

4. Continue by clicking **NEXT** then selecting "**I accept the terms of the License Agreement**" then clicking **NEXT**. *The sequence is displayed below.*
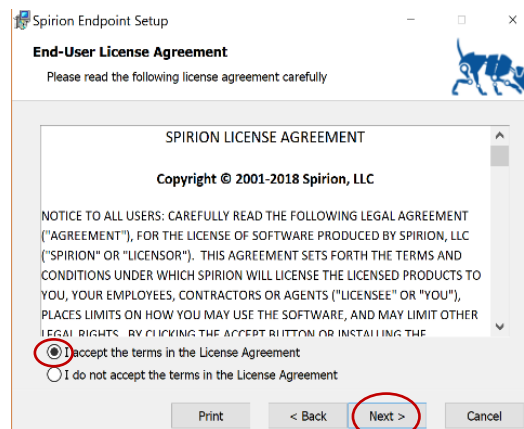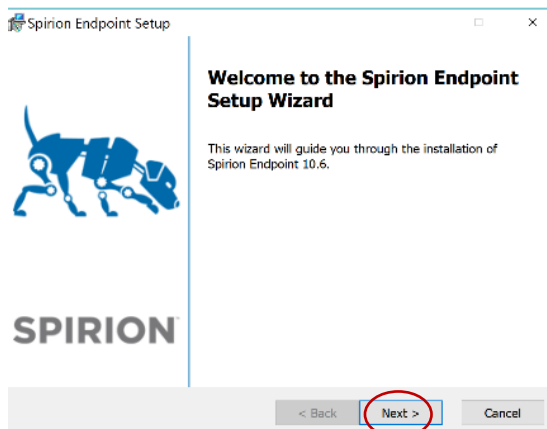
5. The *Choose Setup Type* dialog box will appear. Click the icon next to **Typical**, then click **Install**.

   Enter an Administrator username and password if prompted. The application will install. In the *Completed Spirion Endpoint Setup Wizard*, verify that the "Launch Spirion Endpoint" box is checked, and click **Finish**. Spirion is installed. *The sequence of dialog boxes are displayed below.*
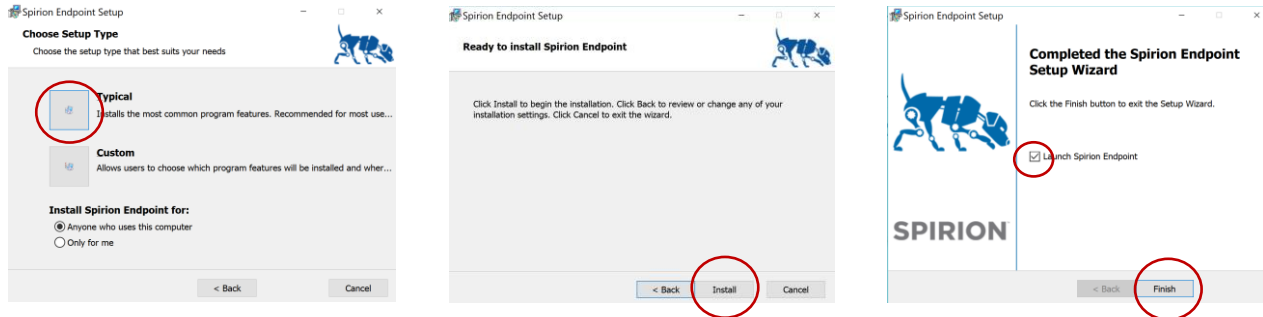

Spirion Setup

If the program is not open, type "Spirion" into the Search Bar (lower left side of screen) and select the **Spirion** icon.

1. When Spirion opens, you will be prompted to create a Profile. A Profile is optional, but important. A Profile will allow access to your secure files, password vault, and search preferences. Most importantly, it will save prior scanned results that are attached to your Profile.

   Note: The Profile password must be remembered, as there is no retrieval process. For more information on Spirion Profiles, see Setting Up Spirion Profiles.

   a. If you wish to create a Profile, enter and confirm a new Profile password. Click **Next**.
   b. If you do not wish to create a Profile, click **Skip**. (A warning message may appear, click **OK**.)

2. Now, set up your Spirion console and adjust your search configurations. In the Search Wizard box, select **Open Advanced Interface**. The Spirion console will display.
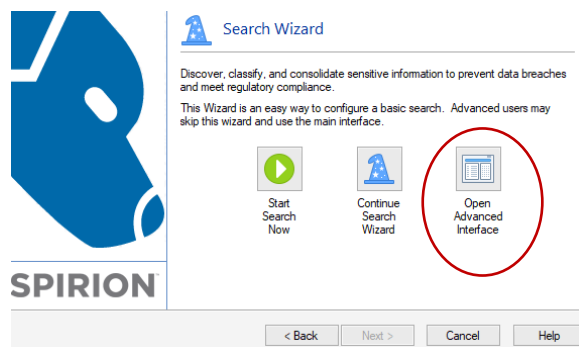

   *On occasion, a message will display, asking if you would like the program to start at the Advanced Interface window in the future. Please select either **Yes** or **No**. The choice is yours.*

   The Spirion console will display.

Although there are many configuration options available in this program, the following instructions will cover three setup options: File, Email, and Data Type configurations.

3. <u>File and Email</u>. Click on the **Locations** tab on the top menu. This tab allows you to set the search locations (e.g., files and emails. Your preset Locations will be highlighted in light blue.
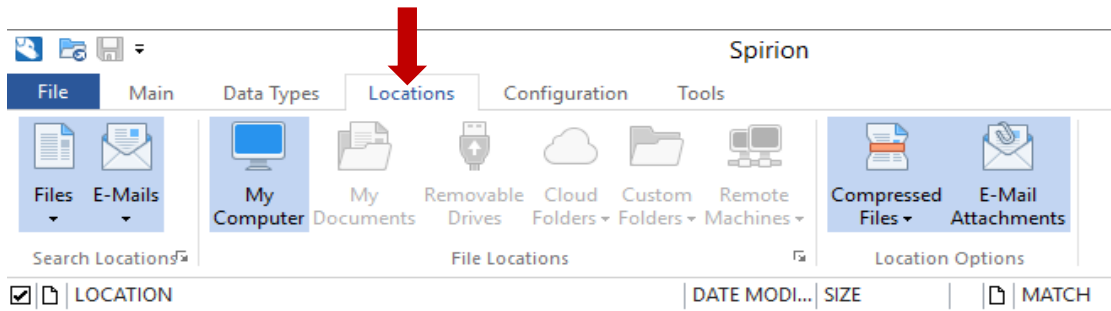

   a. The main USU console requires some specific searching requirements. Spirion is set to search Files; thus your **File** option is highlighted.
   *(If **Files** option is not highlighted in light blue, click the arrow under **Files**, then click **Enable File Search**.)*
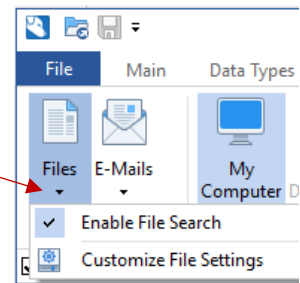
   b. If you would like your emails searched, click the arrow under **Emails** and click **Enable Email Search**. After the Email Search is enabled, you may also select **Email Attachments** on the right side of the menu.
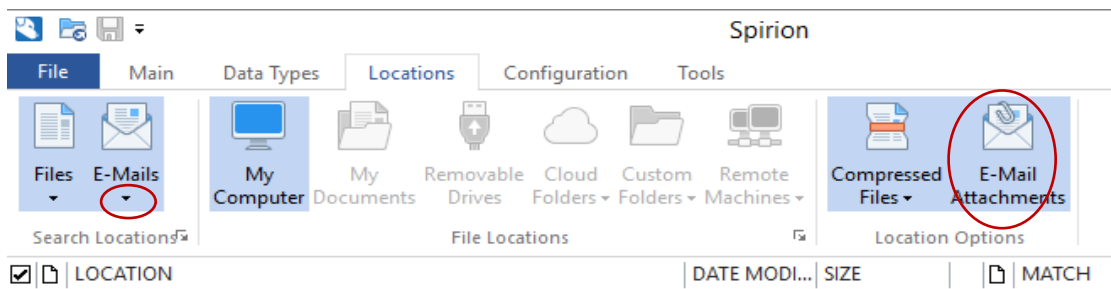
4. <u>Data Types</u>. Next, click the **Data Types** tab on the top menu. This will allow you to determine the data types for Spirion to discover.
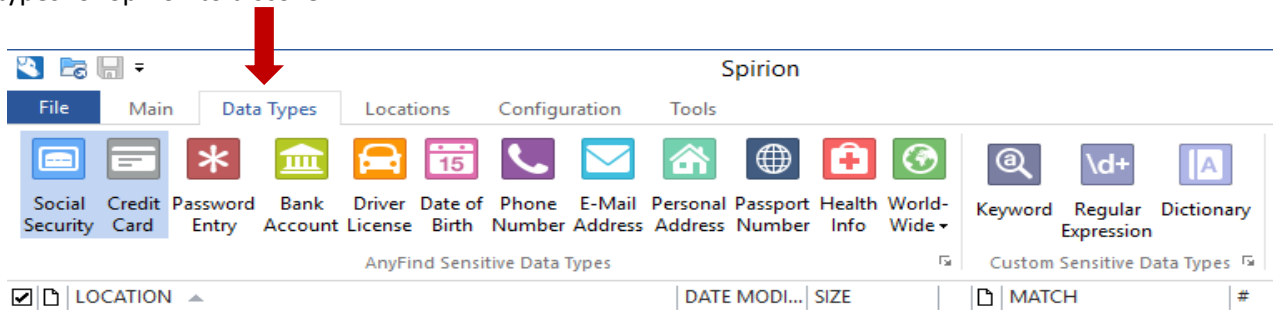
By default, Social Security and Credit Card numbers are highlighted. Click on <u>each additional data type</u> you would like to include in your search. Your selection will depend on the nature of your job functions and the data you handle.

> Available search options include: Social Security Numbers, Credit Card Numbers, Password Entry Numbers, Bank Account Numbers, Driver License Numbers, Date of Birth, Phone Numbers, Email Addresses, Personal Addresses, Passport Numbers, Heath Information, common World Wide Identifiers.

Examples
   a. If you work in Admissions or Registration, you are likely to handle sensitive student-related data. Therefore, the selection of **Driver License** and **Date of Birth** data types would be appropriate choices.
   b. If you work with finances or cash handling, you are likely to handle sensitive financial data. Therefore, the selection of **Bank Account** data type would be an appropriate choice.
   c. If you work in a USU Health Services Division, you are likely to handle sensitive health-related data. Therefore, the selection of **HealthInfo** data type would be an appropriate choice.

Be thorough in your selection, but remember that selecting additional data types will increase the amount of time Spirion needs to scan your machine, so be selective.

You are now ready to run or schedule a Spirion scan.

Spirion Scans (Manual and Scheduled)

USU will prompt University-wide Spirion searches throughout the year. Therefore, if the Spirion (Blue Dog) icon appears in your task bar, without your starting a search, please do not worry. Let the program scan and run. Spirion can slow large processing jobs, but generally, you should see very little difference in your computer performance. Learn more about Computer Performance with Spirion.

Although central scans are initiated, it is ultimately your responsibility to ensure Spirion scans are run. Frequent scans will help detect sensitive data, which must be removed from computer hard drives and placed in secure USU-approved systems.

For control purposes, the USU Data Privacy Office recommends that you run a manual Spirion scan monthly or weekly, depending on the amount of data handled and the sensitive of the data. Scans may be manually started from your Spirion console, or you may create a schedule for Spirion scans (see instructions in the following section).

For detailed instructions on running and remediating a Spirion scan, please log in to the USU Learning System, https://captivateprime.adobe.com/UtahStateUniversity, and type "Spirion" in the Search box.

Manual Scan

Manual scans are also an option from your Spirion console. Select the **Main** tab on the top menu. Click the green **Start** icon in the upper-left corner of the console.
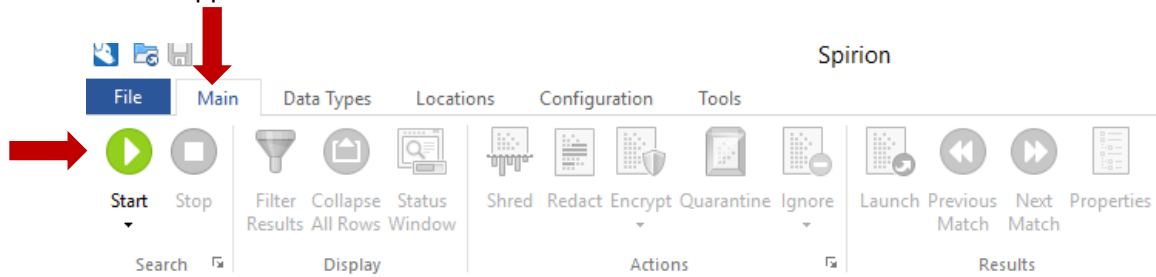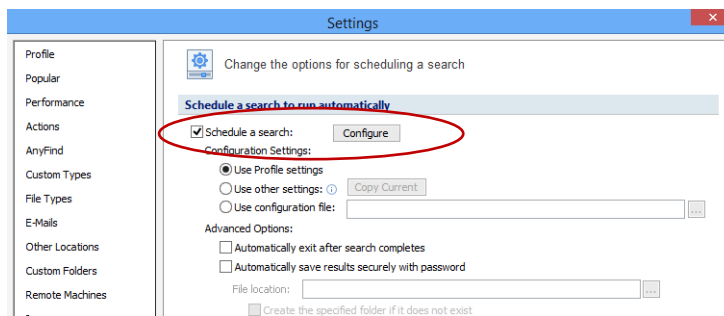

Scheduled Scan (optional)

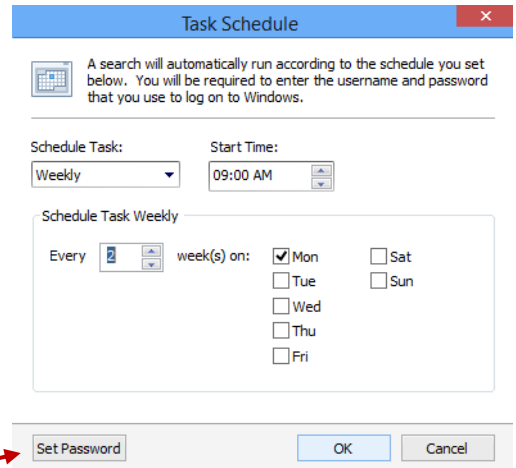The following will explain how to schedule the scan:

1. On the main Spirion console, click the **Configuration** tab on the top menu and select **Scheduling**, then **Enable Scheduling**.
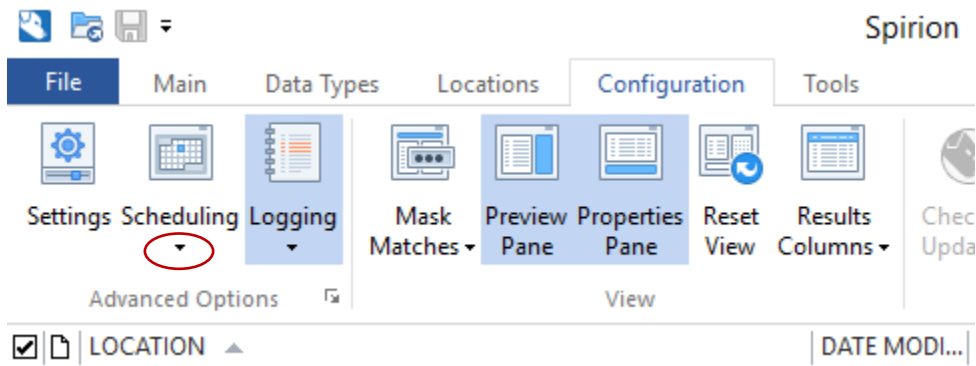
2. In the Settings dialog box, check a box next to **Schedule a search**, then click on the **Configure** button.

3. In the Task Schedule dialog box, set the **Schedule Task** to "Daily", "Weekly", or "Monthly," adding **Start Time** and the other options available.
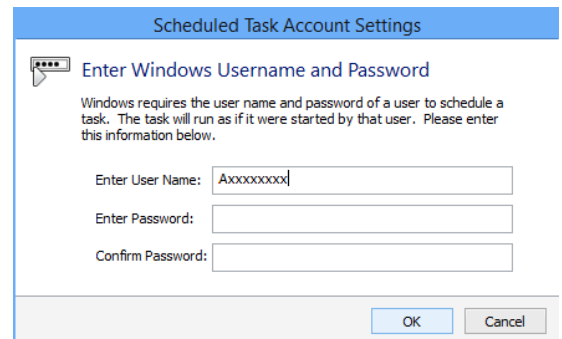
4. Next, before clicking OK, you must **Set Password** to allow the program to run as you.
    For a scan to run automatically, Windows requires your Windows username and password. Depending on your configuration, this is generally your *A Number* (username) and password used to login to your computer at startup. Other configurations may need enter your username as AGGIES\A Number. If unsure, check with your IT personnel to verify.

5. After you have entered your Username and Password, click **OK**. After providing your Windows username, you may be prompted with the following dialog, "In order to use the following information during your scheduled task, your profile password must be saved unencrypted in the Scheduled Task:" In order for Spirion to automatically read the encrypted portions of your profile, it is necessary for the Windows task to store your password. If you do not need the search to include any of this information, click **No**.

You are now ready to scan. *The basics covered in this document are the recommended settings for data discovery. These settings will be saved in your Profile, so please remember your Profile Password. Also, as mentioned above,* detailed instructions on running and remediating Spirion scans are available on the USU Learning System. Please log in, https://captivateprime.adobe.com/UtahStateUniversity, and type "Spirion" in the Search box.

For additional information about Spirion or its use, please review the article Spirion @ USU, contact your local IT support personnel, or contact the USU Help Desk at 435-797-4357 (HELP). Detailed product user guides are also available at https://www.spirion.com/support/user-guides/.

Thank you for using Spirion. Spirion protects USU Data Users by discovering and securing sensitive information.