



## Outlook Secure Email Quick Reference Guide

### Introduction

This document is intended to provide an overview of the process to be followed to securely exchange Emails.

All functionalities can be accessed with touch interactions or by clicking with the mouse on the screen.

### Prerequisites

#### Internal Users (Novartis)

Novartis Internal Associates, with a Novartis Unique ID (Windows login) and a Novartis Email address.

#### External Users (all others)

External Partners need to have one of the following:

- Use Adobe Acrobat Reader (Version 8 or higher) for SecurePDF (Secure Mail Portal registration)
- Own S/MIME certificate or PGP-key-pair in conjunction with a compatible mail client.

### Registration Of New Users

#### Novartis Associates

Novartis associates need to follow an initial registration process to use Secure Mail. The main part of it is an installation and setup procedure that needs to be done on every new or re-staged computer.

Choose **one** of the following options to proceed:

1. Ask a registered Novartis associate to send you an encrypted Email.
2. Initiate the registration procedure by opening this link:  
<https://securemail.novartis.net/SecMail/loginForInternalCert.jsp>
  - On the login page, enter your windows credentials.
  - Click **Get current certificate** to request your personal Secure Mail certificate via Email (registration message).
  - Click **Logout**.

**Note:** If your computer gets migrated, re-staged or replaced, you will need to repeat the procedure that starts by opening the link above.

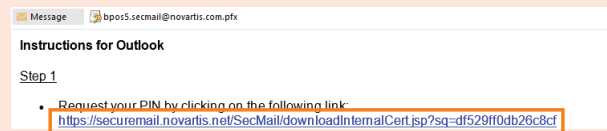
#### External Partners

Externals can only be enrolled by receiving an encrypted Email from a Novartis internal user.

### Registration & Installation Procedure For Internal Users

1. You will receive a signed Email from the Secure Mail Postmaster with your personal Secure Mail certificate (.pfx) attached.
2. Click on the link of this message to request your **PIN** (Personal Identification Number).

*Note. The provided link is valid for 30 days. After that period, the decryption PIN is no longer available for security reasons and you will have to start the above process again.*

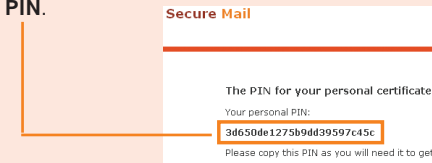


### Registration & Installation Procedure For Internal Users (cont.)

3. In the Secure Mail login screen, enter your **Unique ID (Windows login)** and **Password**.

Click **Login**.

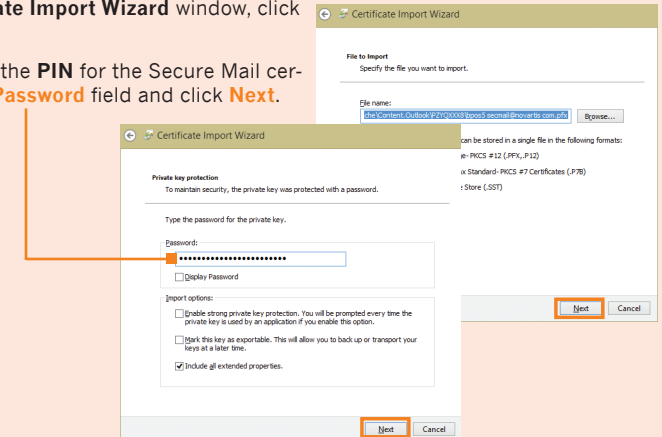
4. You will receive your personal **Secure Mail PIN**.



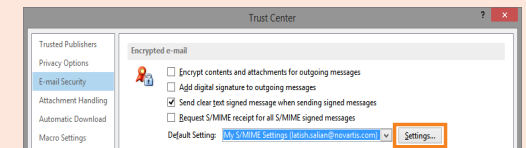
**Note:** This PIN is needed only once, so don't write it down or store it. Instead, you can just use the copy function to have it ready for step 6.

5. Double-click the file attached to the registration Email to install your certificate.
6. In the **Certificate Import Wizard** window, click **Next**.

Enter or paste the **PIN** for the Secure Mail certificate in the **Password** field and click **Next**.



7. To check if the certificate is installed and configured properly, go to **File, Options, Trust Center, Trust Center Settings..., Email Security** and click **Settings...**

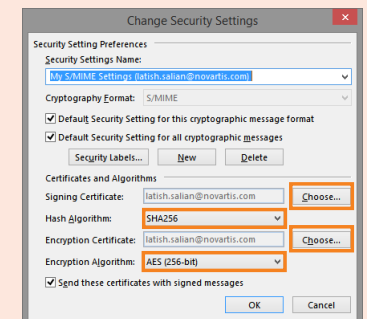


For **Signing Certificate** and **Encryption Certificate** fields, click **Choose**

Select your certificate which has the most recent **Valid from date** and **Issuer : Novartis Silver Two**

In the field, **Hash Algorithm** choose SHA256 and in the field **Encryption Algorithm** choose AES (256-bit)

Click **OK** to save the changes.



## Registration And Delivery Methods For External Users

When a Novartis associate sends an encrypted Email to an external partner, the recipient will receive a registration message and has two basic options to use Secure Mail:

1. Register at the Novartis Secure Mail Portal manually and receive SecurePDF's that allow computer independent communication with little effort. For sending Email, the Secure Mail Portal must be used.
2. Auto-Register by replying with his own personal digital identification (PGP or S/MIME). This allows full integration of Secure Mail into many mail clients.

### OPTION 1 (default): Manual Registration for SecurePDF

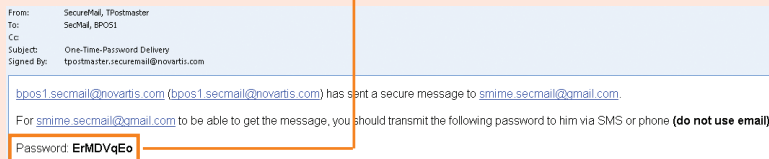
Using this manual registration mode with SecurePDF is easy to setup and basically computer independent (if you have web-mail access).

#### Prerequisites

Adobe Reader (Version 8.0 or higher) to read SecurePDF's. Standard web browser to compose and send encrypted Emails via the Secure Mail Portal.

#### Registration Procedure

1. The external partner automatically receives a registration message. At the same time, the Novartis associate gets an Email with a **one-time password** (OTP).



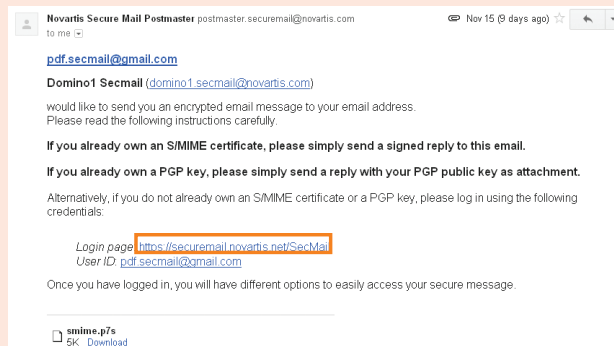
2. The Novartis associate provides this password to the external partner using a different channel than Email (e.g. SMS, telephone).  
**Note:** The confidentiality of the password is not guaranteed if you send it by Email as the mailbox of your external partner can be accessed by other persons like assistants.

3. The external partner must open the link to the Secure Mail Web Portal **Login page**.

#### Notes:

- First login is made using the initial OTP. Afterwards, an own password must be set.
- External partners must use their Email address as user ID.
- Before the registration can be completed, the security questions need to be answered.

4. The original Email initiating the registration message is then encrypted and delivered by using the SecurePDF method.



## Registration And Delivery Methods For External Users (cont.)

### Encrypted Emails Delivery

SecurePDF's are delivered to the recipient via a signed notification Email.

The attached SecurePDF needs to be opened by the Adobe Reader.

The recipient has to enter his login credentials (**Email address** and the previously set **Password**) in the **Novartis SecurePDF login window**.

After authentication, the original message is displayed in a securely downloaded PDF document.

**Note:** See below how to **Remove the Security Warning**.

Replies can only be sent through the Secure Mail web portal (refer to **How To Send Secure Emails**).

### OPTION 2: Auto-Registration

#### Prerequisites

The Novartis Secure Mail service supports auto-registration of S/MIME certificates and PGP keys to fully integrate Secure Mail into standard mail clients.

#### Registration Procedure

1. To perform auto-registration the external user has to reply to the registration message by either adding a signature with his S/MIME certificate or by adding his public PGP-key-file as attachment.
2. The provided certificate and/or public key is stored in the Secure Mail service and used for every encrypted communication between the external partner and the Novartis associate.
3. The original e-mail initiating the registration message is then encrypted with the registered key and sent to the external recipient.

### Remove the Security Warning

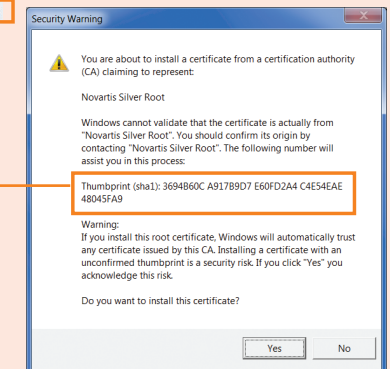
Click the icon with the red exclamation mark to add trust to the Novartis root certificate.

Signed By: There are problems with the signature. Click the signature button for details.

In the opened dialog, click **Trust**.

Check if the **Thumbprint** is equivalent to the following:

If this matches the displayed fingerprint you can allow the inclusion into the trusted root store.



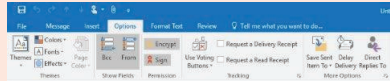
## How To Send Secure Emails

**Note:** Before sending/receiving secure messages you must be registered for the Novartis Secure Mail solution.

### Sending Secure Emails Internally Using Outlook

Compose a message, navigate to the **Options** tab, **Permission** group.

Select **Sign** and **Encrypt**.



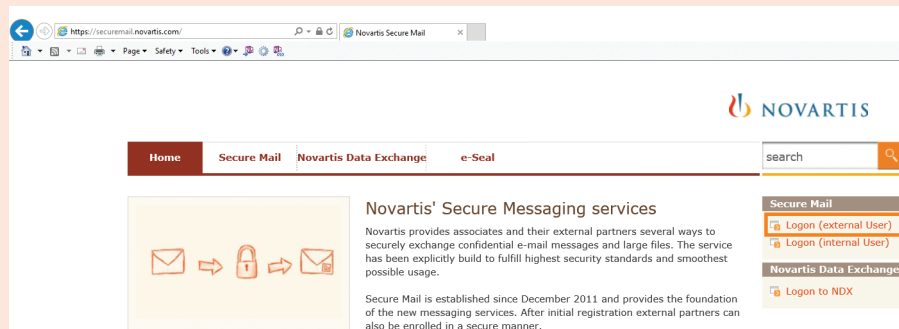
#### Notes:

- You need to be online to use the Secure Mail service. If you want to send secure Emails written offline, save the Email in the **Drafts** folder and send it securely as soon as you have access to the network.
- Encrypted Emails can be read offline.

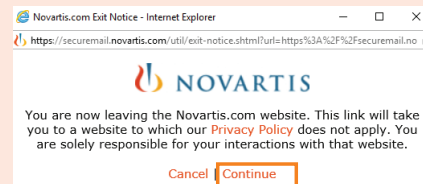
### Sending Secure Emails as External to Novartis Associates Using Secure Mail Services

The **Secure Mail** web portal solution allows secure mail exchange between external partners and Novartis associates through a web interface. This is the only option to exchange secure Emails with external partners who registered for SecurePDF.

Access the **Secure Mail** web portal through the <https://securemail.novartis.com> url and click **Logon (external User)**.



In the **Novartis.com Exit Notice** window, click **Continue**.



Enter your Secure Mail login credentials:

**Email Address** and **Password** set during the registration process.

### Secure Mail

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#### Login

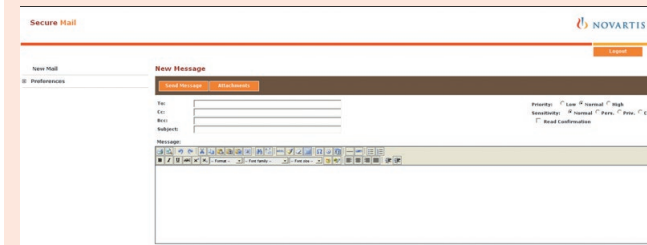
Mobile devices

Email Address:

Password:

[Forgot Password?](#)

After successful login, a secure Email can be created and sent using the web interface.



#### Notes:

- The Secure Mail web portal does not store any Email exchanged between Novartis and external partners.
- The Secure Mail size limit is 12MBytes.
- External users cannot send Secure Mails to other external partners. In fact, it is only allowed to send Secure Mails to Novartis associates.

### Troubleshooting

For further information and guidance, refer to the Secure Messaging homepage <https://securemail.novartis.com>.

### Help

Novartis associates can contact their local IT Service Desk for support.

External partners need to contact their Novartis contact as first point of contact.