

# Handling Spirion Results

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Scope: SO, CCC	Revision Date: 12/13/2018
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## 1. Introduction

Once you are familiar with the layout of the Spirion Client as documented in the [Introduction to the Spirion Client](#) document and you've executed searches by reading either the detailed [Searching with the Spirion Client](#) or the quick reference guide [How to Perform a Search](#), you are ready to work with the results.

This document explains the procedure for working with Spirion results. View the [Spirion documentation](#) to find other useful documents when using Spirion.

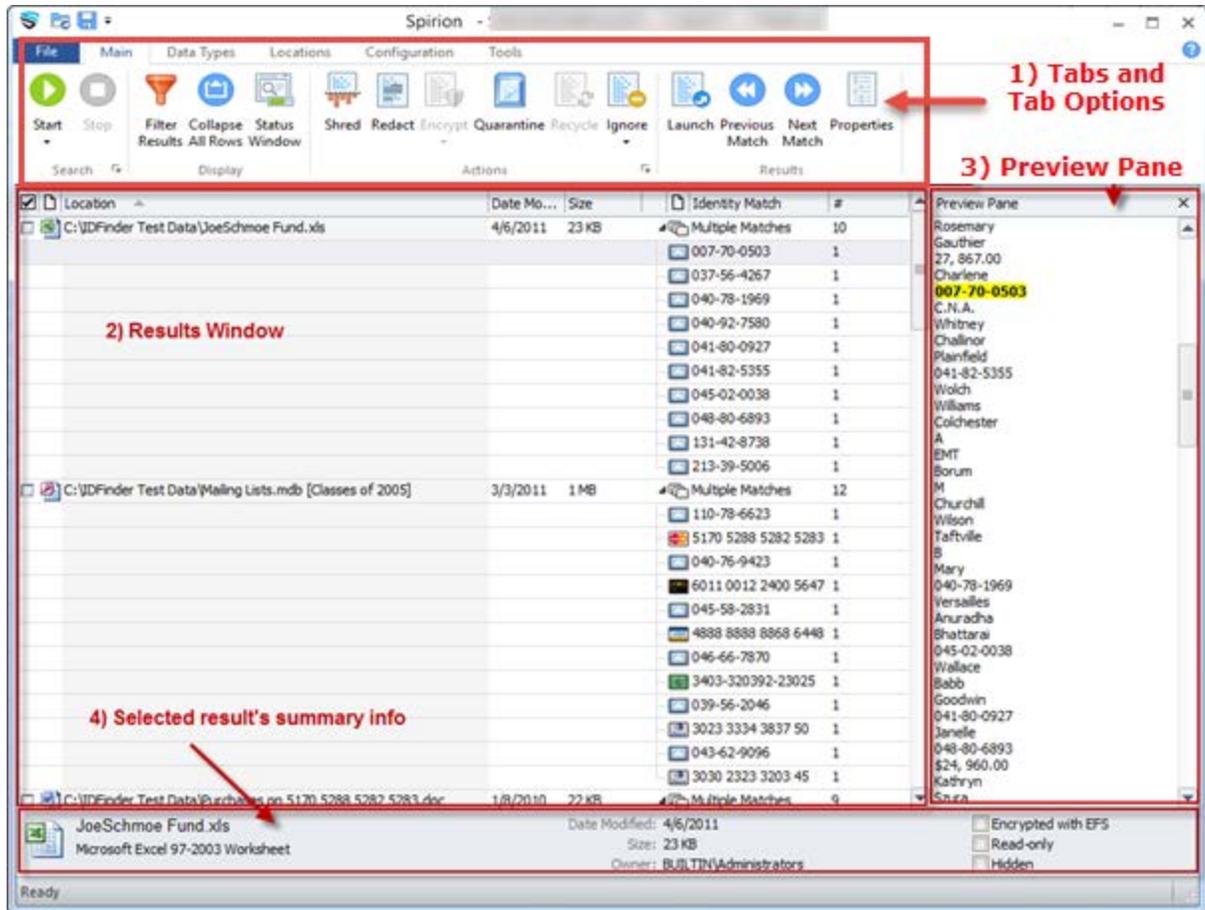
## 2. Intended Audience

The intended audience for this procedure is:

- System Office and CCC

## 3. Procedure

You are ready to perform action on results once you either have completed a search and selected Advanced to view the results or you have opened a previously saved Spirion results file:



The actions that are available to perform on results will depend on the selected result type and the policy in place.

- **Shred:** Is available to be performed on any result type (Excel, Word, Outlook message, PDF, text, etc.)
- **Redact:** Is available dependent upon the selected result type(s). For example, you can't redact a PDF, but you could redact recent versions of Excel or a Word document.
- **Encrypt:** Disabled by policy, so users can't encrypt files using the Spirion client.
- **Quarantine:** Is available dependent upon the selected result type(s). For example, you can't quarantine an Outlook message, but could quarantine a file (PDF, Excel, Word, etc.).
- **Recycle:** Disabled by policy, because it's an insecure option to shredding a document.
- **Ignore:** Is available to be performed on any result type (Excel, Word, email, PDF, text, etc.)

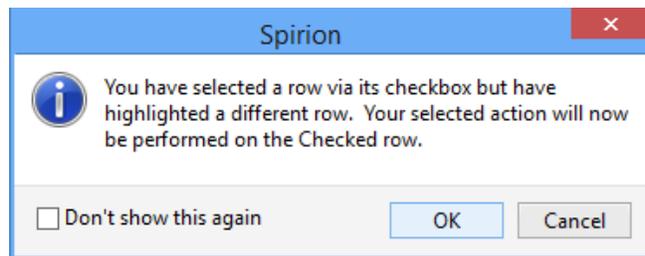
NOTE: If you have multiple result types selected (i.e. Excel and PDF) the available actions will be the actions that are available on all selected files. For example, if Redact won't be available if a PDF is included in the selected files as it's not an available action for that file type.

It is important to know that if you use the checkboxes to the left of the location in order to select multiple locations to perform an action on, **if you have multiple items checked and then**

you highlight another location that is not checked, the action will be performed on the checked items NOT on the highlighted item.



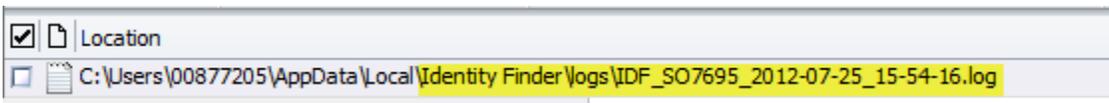
Spirion will warn you of this situation with a pop-up (if you have not previously hidden that pop-up using the “Don’t show this again”):



## What should I do with these locations that contain Identity Data?

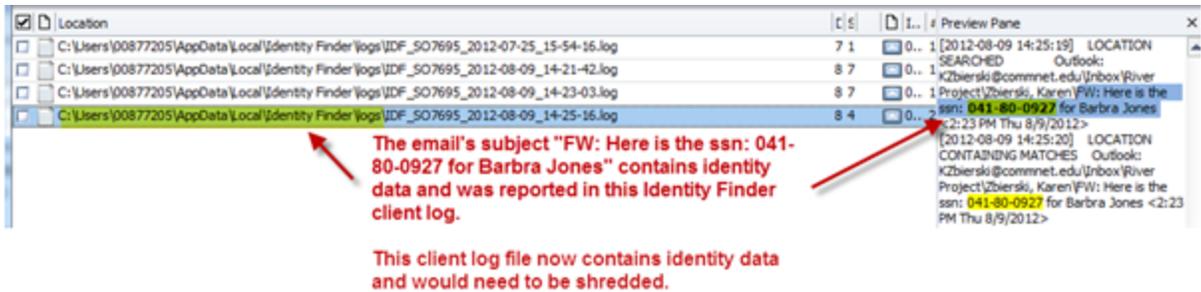
### *Spirion logs are listed as a location*

You may see Spirion client log files (currently they are still in an Identity Finder folder and have IDF in the file name - see the location paths in the example below) showing up in your result list as containing identity data if an email’s subject or the name of a file contains identity data:



Do not ignore this! This means that a previous search you performed found identity data in an Outlook email’s subject or a file’s filename (more often it’s found in the subject of an email not a filename) and the location was written to a Spirion client log file. Then, each time you run a subsequent search of your workstation’s hard drive; it will locate identity data in the Spirion client log file (similar to what is shown above).

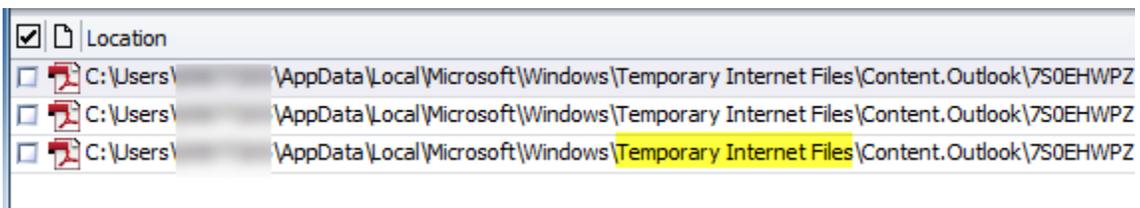
Spirion client log files are automatically removed after 30 days but if this happens, you need to shred the Spirion client log file if the location contains both the identity data (i.e. SSN) and personally identifiable information (like name, address, etc). You can use the preview pane in the client to determine what identity data was found in the Spirion client log file:



NOTE: If the original email with the identity data in the subject hasn't been cleaned, future searches of your email will cause this to happen again and you will have more Spirion client log files show up in the subsequent scans of the hard drive.

### Temporary locations or recycle bin items contain identity data

You may see temporary locations or items in your recycle bin showing up as locations containing identity data:



**These locations should not be ignored as they do contain identity data that can be used for identity theft or financial fraud and need to be cleaned.**

If this occurs, you will need to clean the temporary locations and empty your recycle bin and perform the search again to make sure the temporary data has been removed and no longer show up in your results. Spirion has a Cleanup tool that can help with this step. It is documented in the [Introduction to the Spirion Client](#) on page 12.

### Action Decision Table

Once the results are displayed in the Spirion client, you can begin to work with the results and perform actions on the locations. See the **Actions** section of the [Introduction to the Spirion Client](#) document for details about selecting files in the results window in order to apply actions to selected results.

A **false positive** is something that is listed in your results as being sensitive data when it is not.

For example: A spreadsheet that contains a list of bicycle part numbers that happen to be 9 digits long may appear in your results window as a file that contains Social Security Numbers.

To determine the appropriate action to take for an identity match use the following table. Refer to the [Data Management Standard](#) for more information on data classification levels and state record retention policies that need to be followed before performing any action on DCL3 data.

Is it DCL3 data?	Your decision will be to ...	More information	Step-by-Step
No	Ignore	You need to add the location to your ignore list by using the <b>Ignore</b> action - otherwise it will keep appearing on future scans.	<a href="#">How to Ignore Locations</a>
	Remove	If you are sure the file no longer needs to be retained, use the <b>Shred</b> action to securely delete the file.	<a href="#">How to Shred Locations</a>
Yes	Remove	If you are sure the file no longer needs to be retained, use the <b>Shred</b> action to securely delete the file.	<a href="#">How to Shred Locations</a>
	Retain	<p>If the file needs to be retained <i>and the file needs to contain the DCL3 data intact</i>, the file will need to be moved to a secure location using the <b>Quarantine</b> action.</p> <p>The original file is shredded and is replaced with a text file that contains the new location.</p>	<a href="#">How to Quarantine Locations</a>
		<p>If the file needs to be retained <i>but the DCL3 data in the file can be masked</i>, use the <b>Redact</b> action.</p> <p>The Redact action creates a new file with the DCL3 data masked and the original file is shredded.</p>	<a href="#">How to Redact Locations</a> * See warning about redacting files containing social security numbers that begin with zeros.
	Although the product supports encrypting locations via the Spirion client, it is not supported at this time. When this option is available, we will add step-by-step instructions.	N/A	

## Step-by-Step Instructions for Performing Actions

### *How to Ignore Locations*

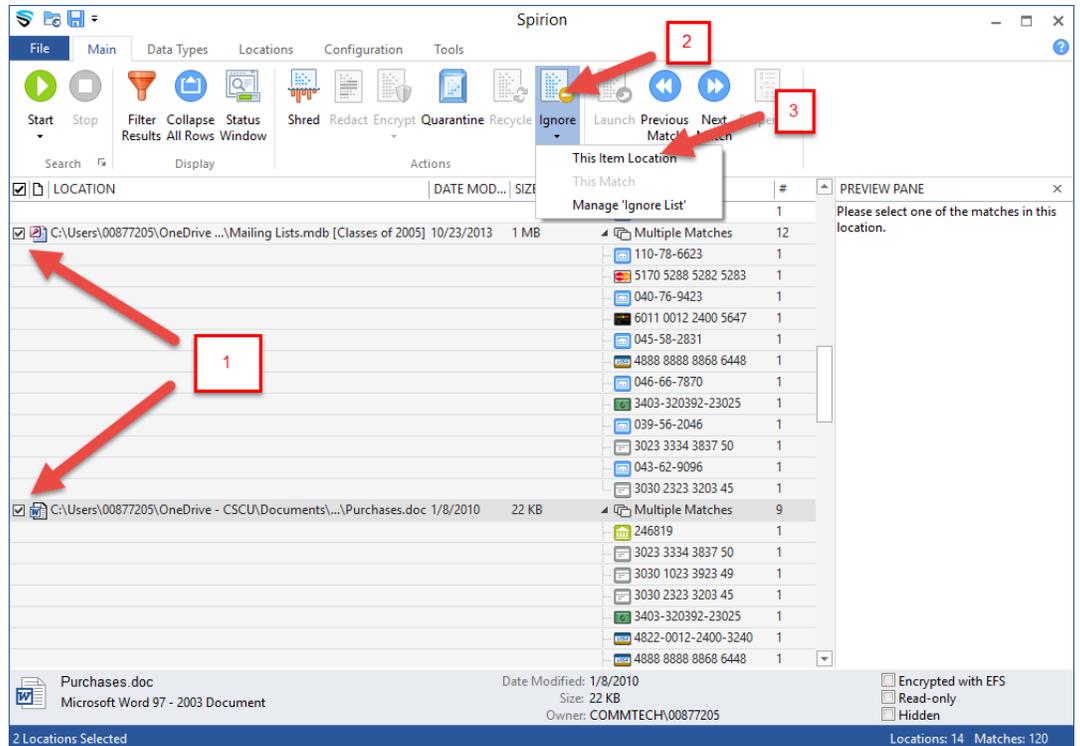
NOTE: You should only be ignoring **Test Data/False positives** (i.e. data that is being flagged as DCL3 data that is not DCL3 data or test data). You do not want to ignore real DCL3 data as the DCL3 data will still exist in the unapproved location, and by ignoring the location you will no longer be alerted and will no longer be displayed in the results.

You can ignore the entire location (file or e-mail) or you may ignore specific identity matches (i.e. a specific match that frequently appears as an identity match) that may appear in multiple locations.

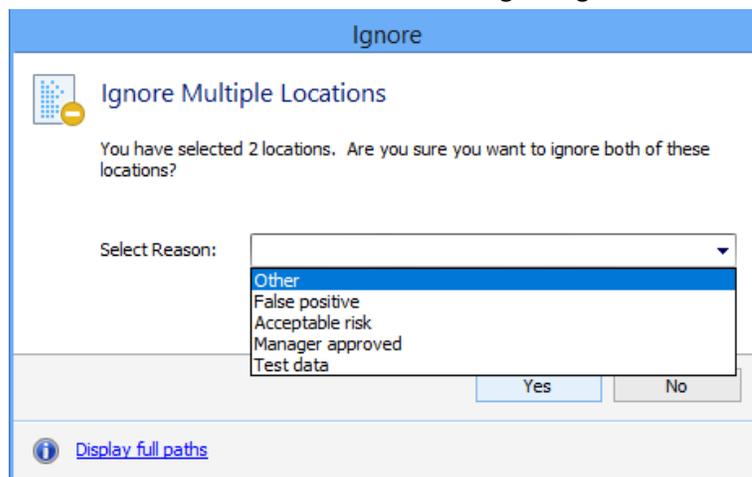
NOTE: Your ignored locations and matches are stored in a per-user per-workstation Spirion profile. Therefore if something happens to your Spirion profile (it becomes corrupt, you created a new profile, get a new workstation, etc.) your ignored locations and matches will be deleted and you may see locations or matches that you had previously ignored, appear again and you may have to ignore locations or matches again.

#### **To ignore an email or file location:**

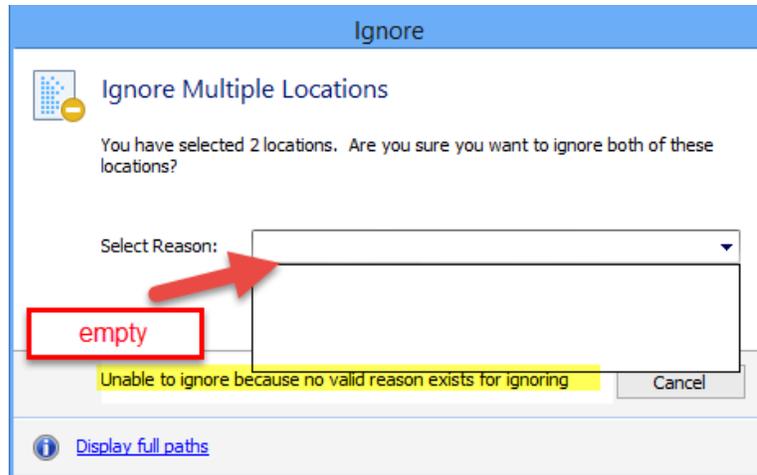
1. In the results window, put a check mark in the box in front of each location that you want to ignore.
2. Click the **Ignore** action. You can ignore multiple files at the same time.
3. To ignore the location(s), click **This Item Location**.



4. You will then need to select a reason for ignoring the item and then click **Yes**:



NOTE: If when you try to select a reason, the list is empty and there is an error at the bottom that says "Unable to ignore because no valid reason exists for ignoring", please open a ticket with your local IT department:

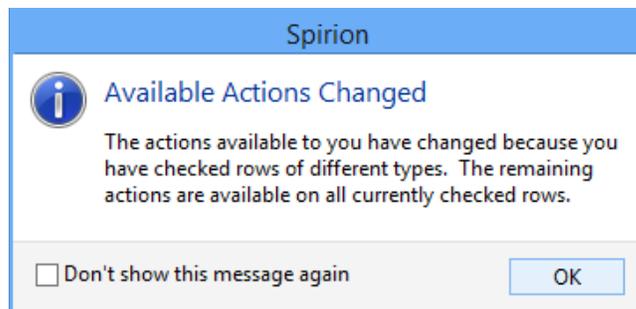


5. Once added to your ignore list, results in that location will no longer be flagged as a result.

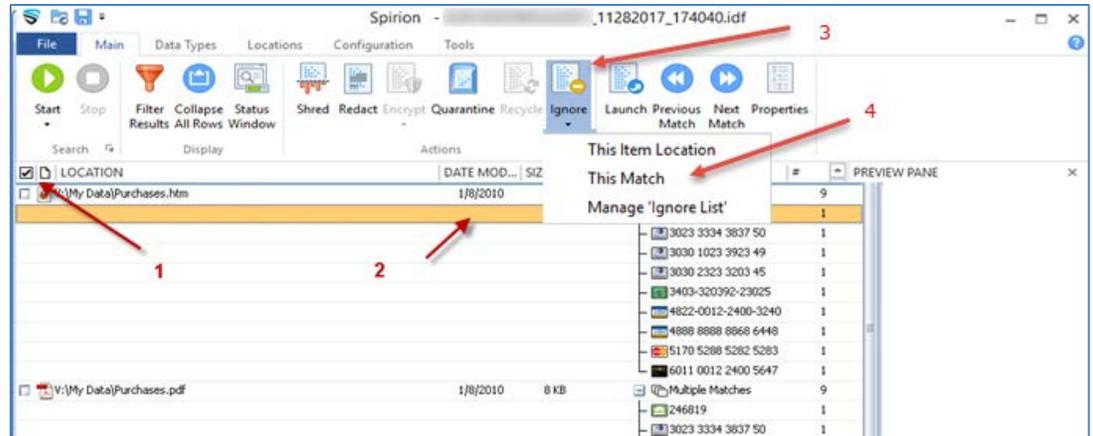
#### To ignore an identity match:

You cannot have any locations checked when you want to ignore an identity match (the option will be grayed out). Therefore, if you had any locations already checked, you'll need to make sure none are still checked: click the top check box for "all locations" (you may have to click it twice) so that any previously checked files are now no longer selected.

NOTE: You may see this popup letting you know that the available actions have changed, just press OK:



1. In the results window under the Match field, select the match you wish to ignore (will be highlighted NOT checked)
2. Click the **Ignore** action.
3. Click **This Match** to place the identity match on your ignore list. If the option is grayed-out, it means that there is more than one location selected. Use the checkbox to deselect all locations before selecting a single match.



### How to Shred Locations

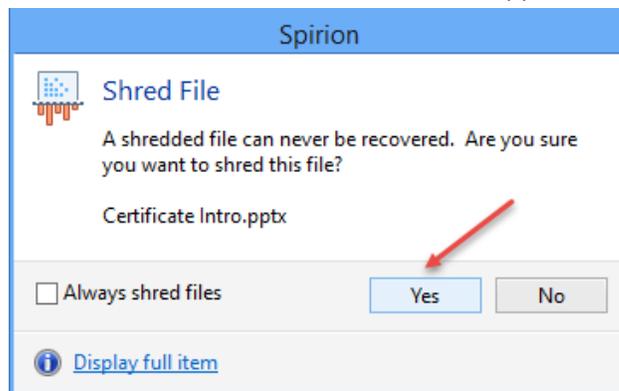
1. In the results window, put a check mark in the box in front of each location that you want to shred.

**WARNING! – You cannot undo shredding. Be sure to check your selections carefully.**

2. Click the **Shred** action. You can shred multiple files at the same time.



3. The Shred File confirmation window will appear. Click **Yes**.



### How to Quarantine Locations

To Quarantine an Email:

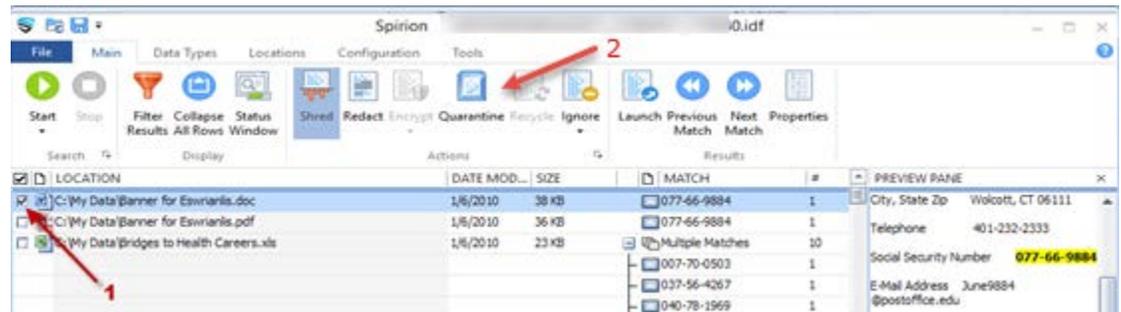
There is no action available for quarantining an email in Outlook using the Spirion client. Therefore, mail messages or mail attachments that contain DCL3 data need to be moved manually using Outlook from the original location into the [CSCU Protective Enclave](#).

Because this process has to be done manually and the email may need to be properly retained per state retention, this procedure was made into a “Quick Reference Guide” located on the [Spirion Client](#) page.

### To Quarantine a File:

Quarantining a location, shreds the original file and a copy of it is moved to the location you have selected. A text file containing the location of the quarantined file is placed in the original location. There is no other way to find the new location of the quarantined file (i.e. there is no log file you can view to see where quarantined files were moved to).

1. In the results window, put a check mark in the box in front of each location that you want to quarantine.
2. Click the **Quarantine** action. You can quarantine multiple files at the same time.

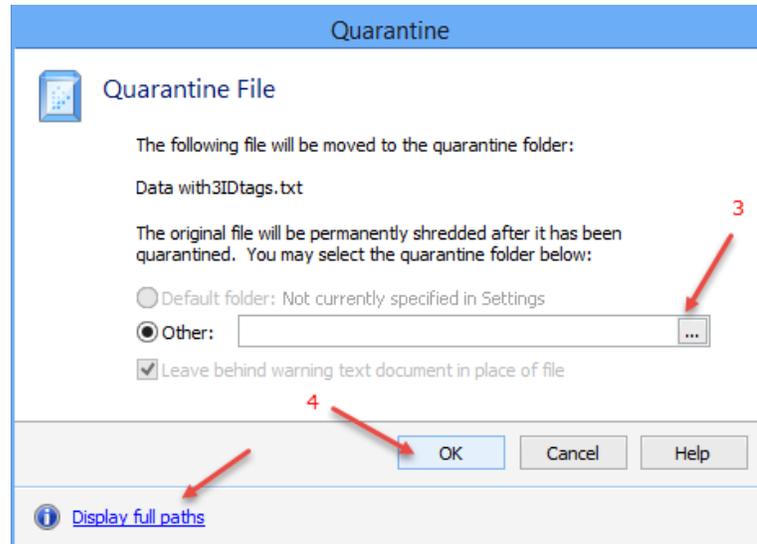


3. The Quarantine File window will appear. Click the browse button to browse to the location where you will be moving the file that contains DCL3 data. Since all DCL3 data needs to reside in the [CSCU Protective Enclave](#), if a Spirion search identifies data that contains DCL3 that is located outside of the Protective Enclave, it will need to be securely moved into the Protective Enclave using your Enclave-Transfer library.

**NOTE:** Because your Enclave-Transfer folder is securely shredded every night, you can use the quarantine action to move the documents into your Enclave-Transfer library but you must remember to log into the Protective Enclave and move those documents into your Enclave-Docs library otherwise they will be shredded at 2 AM every night and will be unrecoverable.

If you wish to see the full path of the file to be quarantined, click the **Display full paths** link.

4. Then click **OK**. The file will be moved to the secure quarantine location:



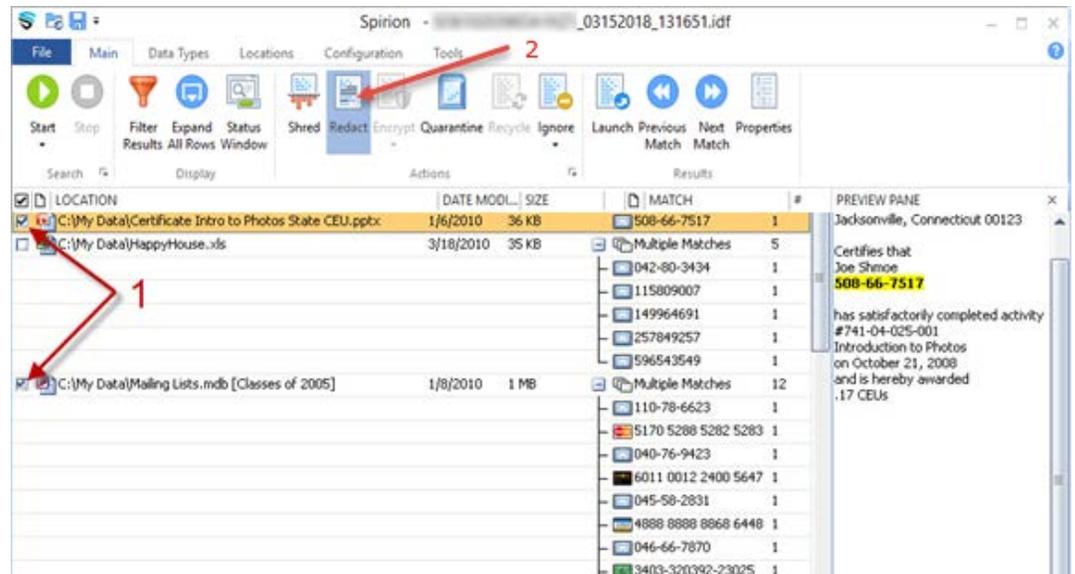
5. Click **OK** in the Quarantine Notification and Confirmation windows if they are displayed.

### *How to Redact Files*

In Spirion you can redact (i.e. mask the identity matches) from the following types of files:

- Microsoft Office 2007+
- Text files, such as .txt, .csv or .log files.

1. In the results window, put a check mark in the box in front of each location that you want to redact identity matches. If you've selected a file that does not support the redact action, the Redact option will be grayed out. You'll need to deselect unsupported files in order to have the Redact action selectable.
2. Click the **Redact** action. Redact will replace all identity matches displayed with the X character:



**Warning! The redact action only masks the identity matches that are displayed in the Identity Match column and may leave identities in files.**

This option is OK to use if all identity data is displayed, but it may be the case that Spirion is only able to identify some identity data and other data is not listed. **It is the responsibility of the data owner to make sure all identity data is redacted from the location – not just the identity matches displayed in the Identity Match column.**

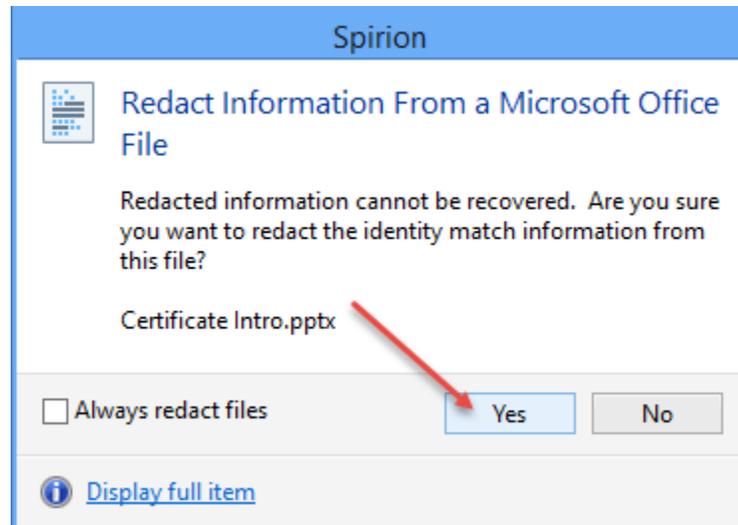
Example: An Excel spreadsheet contains social security numbers using the Excel formatting to display social security numbers that start with leading zeros as 9 digit numbers (i.e. Excel normally truncates leading zeros from numbers).

So a cell may be formatted to look like a social security number “023-90-9333” but actually stores “23909333” in the cell which cannot be identified as a social security number using Spirion and will not show up in the Identity Match field when that Excel document is scanned.

In this case, if you were to use the redact utility to redact a file that is marked as containing social security numbers – it will only redact the 9 digit social security numbers that do not start with leading zeros – and leave the 8 or 7 digit social security numbers (e.g. 003-03-0003 or 033-03-9999).

Suggestion: Open the file that is listed as containing identity matches and manually make the changes needed to redact the data from the location. After the identity matches have been manually redacted, future searches should not list this location as containing identity matches.

3. The Redact information window will appear. Click **Yes** to redact the information. We highly suggest you do not enable the “Always redact files” so you are warned with the pop-up when you redact:



4. Click **OK** in the confirmation window if it displays (if you haven't enabled the “Don't show this again” in that window in the past.)

### *How to Encrypt Files*

We do not support using the Spirion client to encrypt files, so this option is disabled and not able to be used.