




Secure Your Emails and Documents by Microsoft Azure Information Protection (AIP)

(2021 Updates for IT Coordinator)

Information Technology Services Centre
January 2021

Agenda

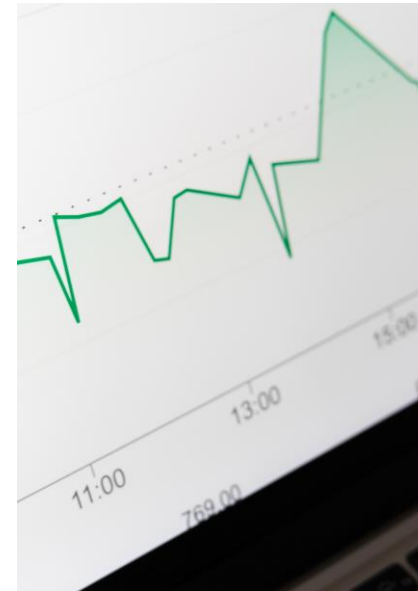
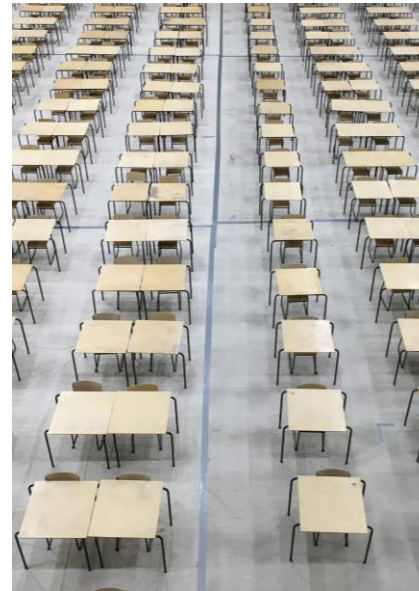
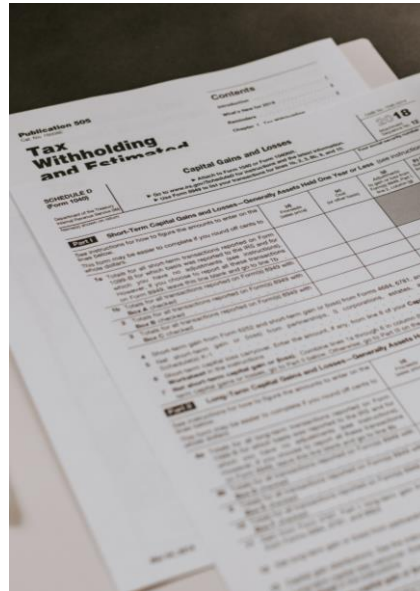
- The Need for Document Protection
- Microsoft Information Protection
- Demo

A top-down view of a person's hands typing on a laptop keyboard. The person is wearing a dark watch on their left wrist. To the left of the laptop is a spiral-bound notebook with a pen resting on it. To the right is a white coffee cup on a saucer with a tea bag. Further right is a book titled 'The Tipping Point' by Malcolm Gladwell. A small potted plant is in the top right corner. The background is a light-colored wall.

The Need for Document Protection

The Need for Document Protection

- Maintaining a high level of document security keeps the University from **loss of intellectual property, damage in reputation** and **facing legal consequences**.



The Need for Document Protection

- [Data Classification and Data Governance Policy](#), published in Aug 2016, proposes a comprehensive framework for protecting University's digital information, particularly digital-based documents.

Level	Data Classification	Definition	Example
1	Strictly Confidential	The HIGHEST level of security controls. Unauthorized disclosure of this data would cause severe adverse effect to individuals or on operations, assets and reputation of the University. <i>The STRICTEST security policy should be applied even if this may incur considerable inconvenience to the users.</i>	<ul style="list-style-type: none"> • Data deemed highly confidential by the University • Data protected by regulations such as the Hong Kong Personal Data (Privacy) Ordinance • Health/Patient information may or may not be regulated by Hospital Authority (HA)
2	Confidential	Unauthorized disclosure of this data would cause a moderate level of risk to individuals or the University. <i>Strict security policy should be applied even if this may incur some inconvenience to the users.</i>	<ul style="list-style-type: none"> • Data deemed confidential by the University • Personal data (e.g. Student ID, staff ID) not classified as Level 1.

Microsoft Information Protection



Microsoft Azure Information Protection (AIP)

- **Comprehensive data protection solution:** AIP helps you to classify, label and protect the documents according to the confidential level of the information.
- **Instant and automatic protection:** Once a document is labelled, corresponding predefined security policy will be applied automatically to protect the document and limit the access against unauthorized person.
- **Centralized access control:** Protected content is only available to those having a valid CUHK staff account.

Convenient and Predefined Classification Labels and Visual Markings

- Corresponds to [Data Classification and Data Governance Policy](#).

Classification Labels	Permissions to <u>all Staff</u>	Visual Markings in Office Documents* / Emails
Strictly Confidential	<ul style="list-style-type: none"> ✓ View ✓ Reply / Reply-all 	Header, and Footer Watermark (for Office Documents only)
Confidential	<ul style="list-style-type: none"> ✓ View ✓ Edit ✓ Save / Save-as / Export / Print ✓ Reply / Reply-all / Forward ✓ Copy-n-paste / screenshot 	Header and Footer

* Microsoft Word (.docx), Excel (.xlsx) and PowerPoint (.pptx)

A top-down view of a person's hands typing on a laptop keyboard. The person is wearing a white shirt and a dark watch on their left wrist. The desk is white and features a laptop, a spiral notebook with a pen, a small potted plant, a book titled 'The TIPPING POINT' by Malcolm Gladwell, and a cup of coffee on a saucer. The background is a soft, light-colored wall.

Protection for Word / Excel / PowerPoint

Protect Word / Excel / PowerPoint Documents in **1 click**

The image illustrates the process of applying a sensitivity label to a document in Microsoft Word. It shows the ribbon, the Sensitivity menu, and the resulting document header with a classification label and a visual marking.

1. Select the classification label

2. Classification Label applied to the document

3. Visual Marking added in document header

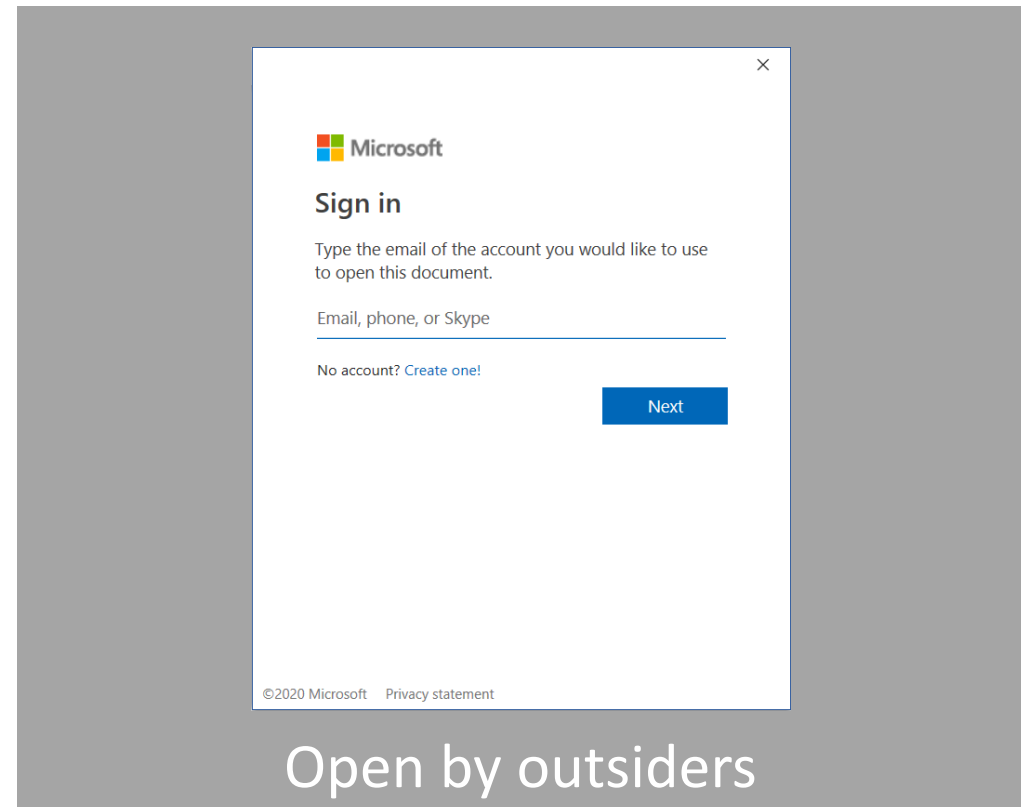
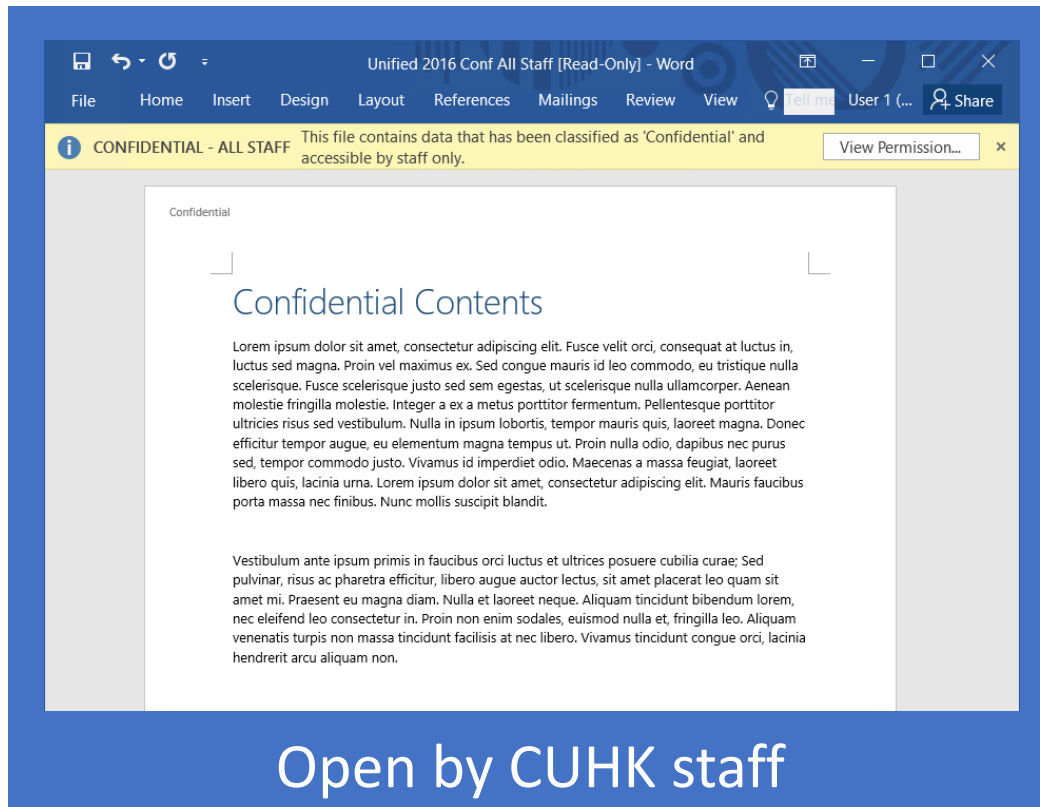
The screenshot shows the Microsoft Word ribbon with the **Sensitivity** button highlighted. The **Sensitivity** menu is open, showing the following options:

- Confidential
- Strictly Confidential
- Show Bar
- Help and Feedback

The **Confidential** option is selected, and the document header displays the classification label **Confidential \ All Staff**. The **Confidential** label is also visible in the document header.

Open Protected Documents

- Outsiders are unable to open protected documents as they are encrypted.

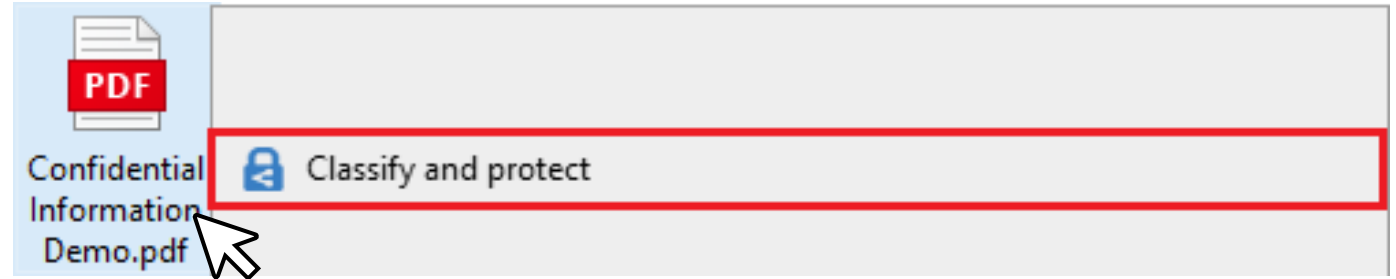




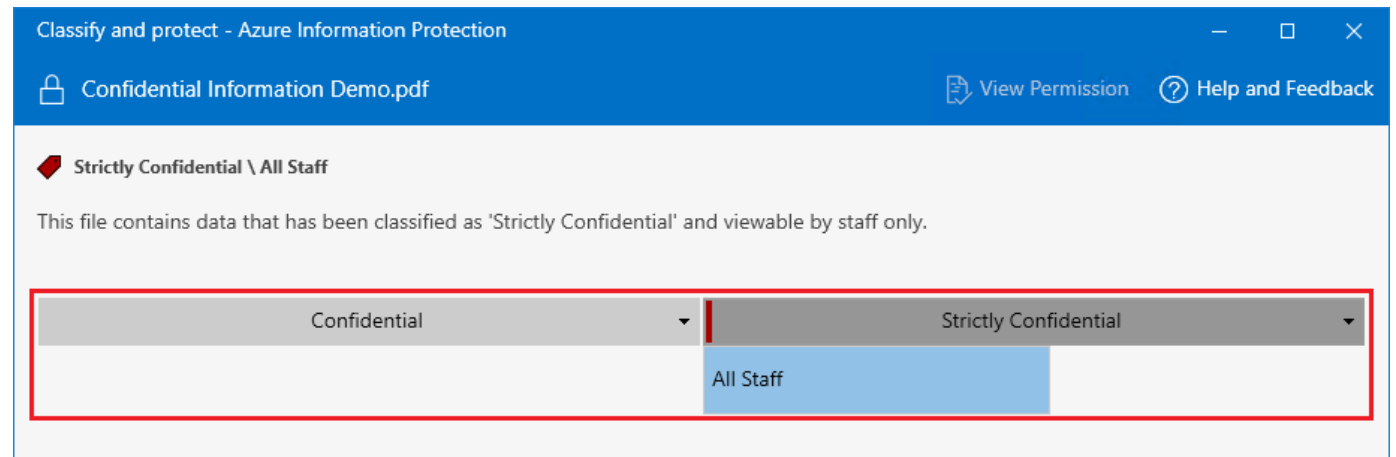
Protection for PDF

Protect PDF Files using AIP App

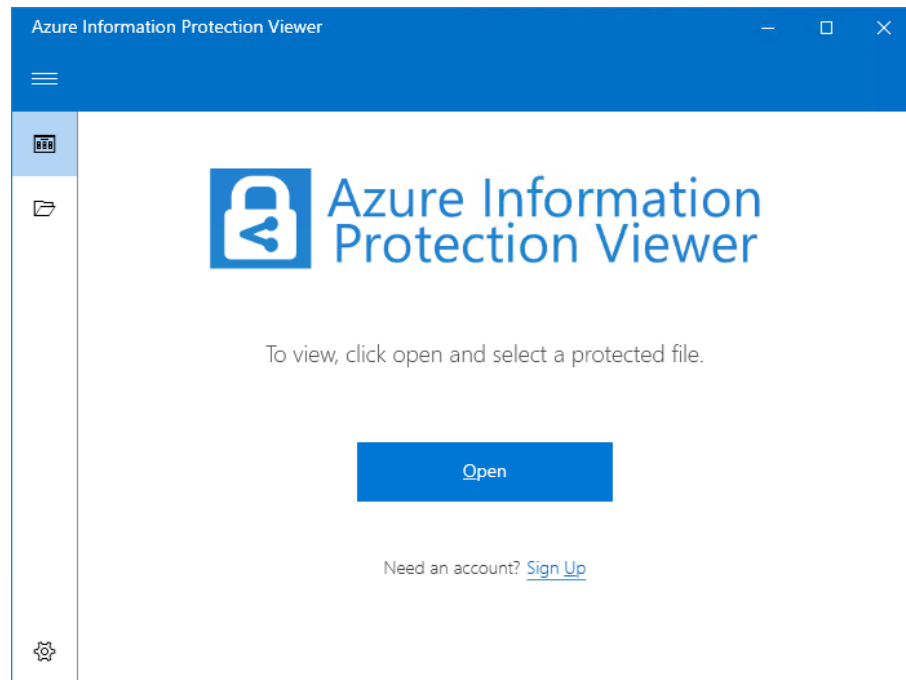
1. Right-click the PDF file and click 'Classify and protect' from the context menu.



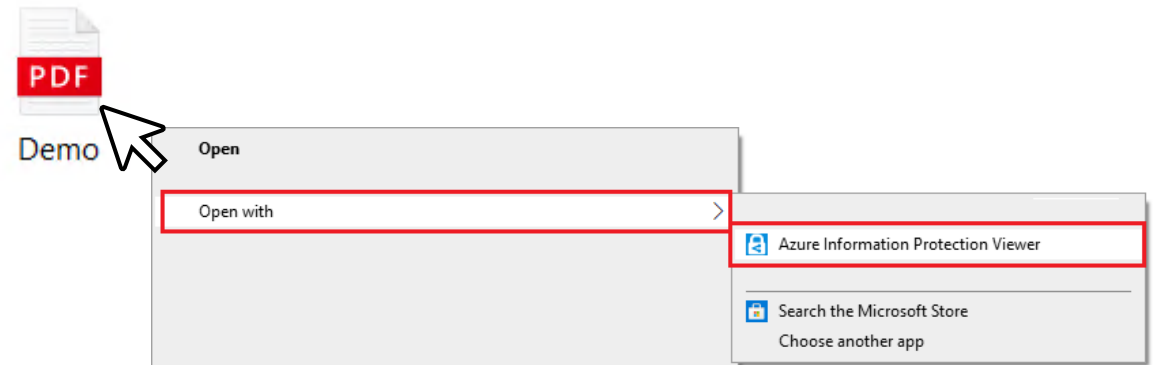
2. Select preferred protection and click 'Apply' from AIP app.



Open Protected PDF Files using AIP Viewer

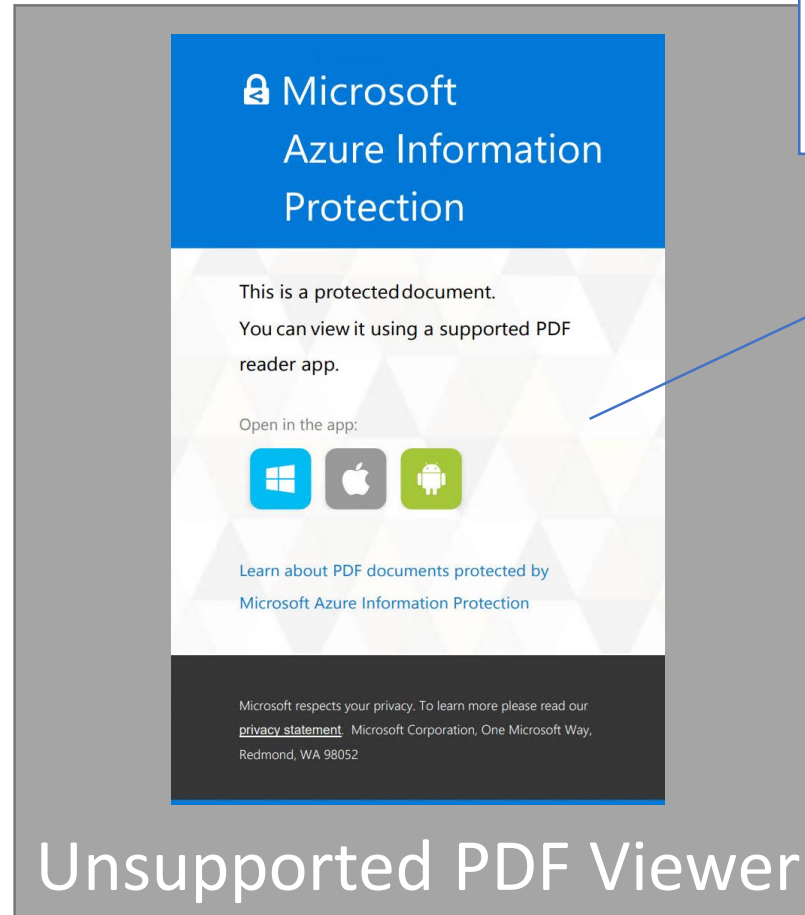


Launch the app from
Start Menu ...



... or right-click the PDF file >
Open with > Azure Information
Protection Viewer

Open Protected PDF Files using AIP Viewer (cont'd)

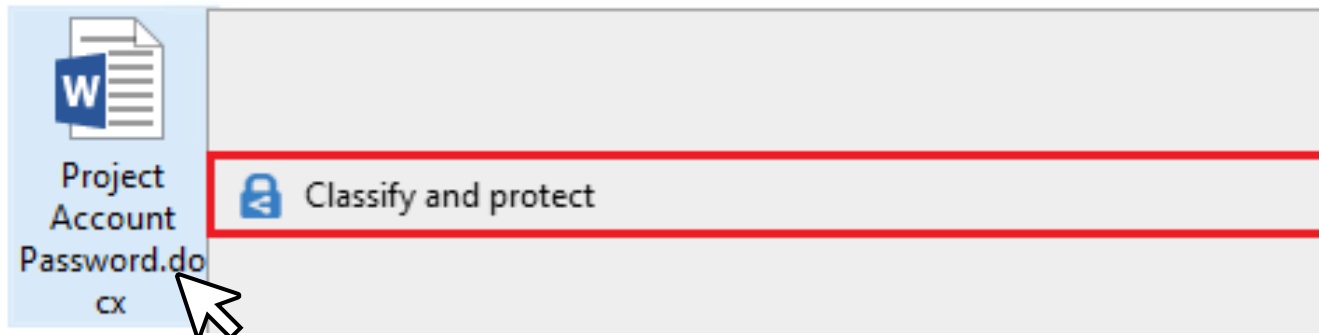




Custom Permissions

Protect Document with Custom Permissions

1. Right-click the file and click 'Classify and protect' from the context menu.



Protect Document with Custom Permissions

2. In the AIP app ...

The screenshot shows the 'Classify and protect - Azure Information Protection' window. The document being protected is 'Project Account Password.docx'. The interface includes a top navigation bar with 'View Permission', 'Track and Revoke', and 'Help and Feedback' options. The main content area is divided into several sections: a checked checkbox for 'Protect with custom permissions', a 'Select permissions' dropdown menu currently set to 'Viewer - View Only', a 'Select users, groups, or organizations' text box containing the email address 'demouser@cuhk.edu.hk', and an 'Expire access' date picker set to '12/31/2026'. At the bottom, there are 'Apply' and 'Close' buttons.

Check **Protect with custom permissions**

Select permissions

Enter email address /
Select users (requires Outlook)

(Optional) Set an expiry date

Labels vs. Custom Permissions

	Labels	Custom Permissions
Predefined Access Rights	✓	
Headers and Watermark	✓	
Applicable to Email	✓	
Allow Access for Specific Users		✓
Expire Access		✓

A top-down view of a person's hands typing on a laptop keyboard. The person is wearing a white shirt and a black watch. The desk is white and features a laptop, a calendar for September 2018, a book titled 'The Tipping Point' by Malcolm Gladwell, and a cup of coffee on a saucer. A small potted plant is also visible on the desk. The background is a soft, out-of-focus white.

Protection for Email

Protect Your Email in 1 click

The screenshot shows the 'Message' ribbon in Microsoft Word. The 'Sensitivity' group is highlighted with a red box, and a callout box labeled '1. Select classification label' points to the 'Sensitivity' dropdown menu. Below the ribbon, a red box highlights the 'Strictly Confidential \ All Staff' label and the 'Confidential' and 'Strictly Confidential' dropdown menus. A callout box labeled '2. Classification Label applied to email' points to the 'Strictly Confidential' dropdown. The email header shows 'To...' as 'User 1 (RMS);', 'Cc...' as empty, and 'Subject' as 'Protected Email Demo'. The main body of the email contains the text 'Confidential Contents' and a paragraph of Lorem Ipsum text.

1. Select classification label

2. Classification Label applied to email

File Message Insert Options Format Text Review Tell me what you want to do...

Sensitivity

Low Importance

Tags

View Templates

My Templates

Strictly Confidential \ All Staff

Confidential

Strictly Confidential

Strictly Confidential - All Staff - This file contains data that has been classified as 'Strictly Confidential' and viewable by staff only.
Permission granted by: demouser@cuhk.edu.hk

To... User 1 (RMS);

Cc...

Send

Subject Protected Email Demo

Confidential Contents

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce velit orci, consequat at luctus in, luctus sed magna. Proin vel maximus

Read Protected Email – CUHK Staff

File Message Tell me what you want to do...

Reply
Reply All
Forward

Respond

Simon Ngai (UAD) | User 1 (RMS)

Strictly Confidential Demo

Strictly Confidential - All Staff - This file contains data that has been classified as 'Strictly Confidential' and viewable by staff only.
Permission granted by demouser@cuhk.edu.hk

Strictly Confidential

Confidential Contents

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce velit orci, consequat at luctus in, luctus sed magna. Proin vel maximus ex. Sed congue mauris id leo commodo, eu tristique nulla scelerisque. Fusce scelerisque justo sed sem egestas, ut scelerisque nulla ullamcorper. Aenean molestie fringilla molestie. Integer a ex a metus porttitor fermentum. Pellentesque porttitor ultricies risus sed vestibulum. Nulla in

'Forward' button is disabled
(for Strictly Confidential)


Classification label

Visual marking
(for Strictly Confidential)


Read Protected Email – Outsider

- Outsider won't have access to the protected email.

Strictly Confidential Demo

 Simon Ngai (UAD) <demouser@cuhk.edu.hk>
Wed 2020-12-09 10:05 PM
To: outsider@externalmail.com

Simon Ngai (UAD) (demouser@cuhk.edu.hk) has sent you a protected message.



[Read the message](#)

[Learn about messages protected by Office 365 Message Encryption.](#)

[Privacy Statement](#)

Email encryption powered by Office 365. [Learn More](#)
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

[Reply](#) | [Forward](#)

A top-down view of a person's hands typing on a laptop keyboard. The person is wearing a white shirt and a black watch. The desk is white and features a laptop, a spiral notebook with a calendar for September, a pen, a small potted plant, a book titled 'The Tipping Point' by Malcolm Gladwell, and a cup of coffee with a tea bag. The background is a soft, out-of-focus white.

Installing AIP Client

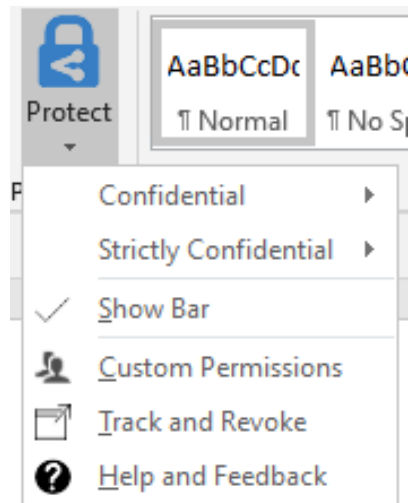
Single Installer for All Features

1. Office add-ins
2. Classify and protect tool
3. PDF viewer

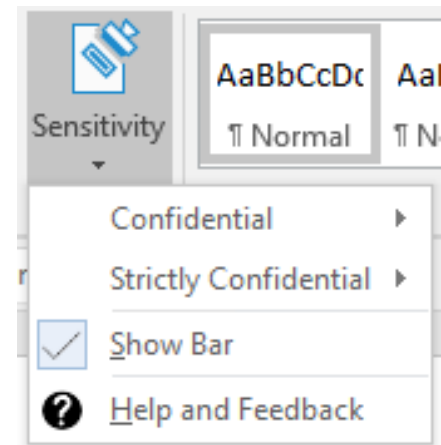
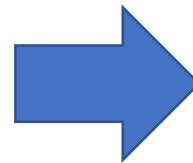


Installing AIP Client in Office

- **New installations** – please request your departmental IT for help
- **Existing users (important)** – please arrange an upgrade on or before 31 Mar 2021



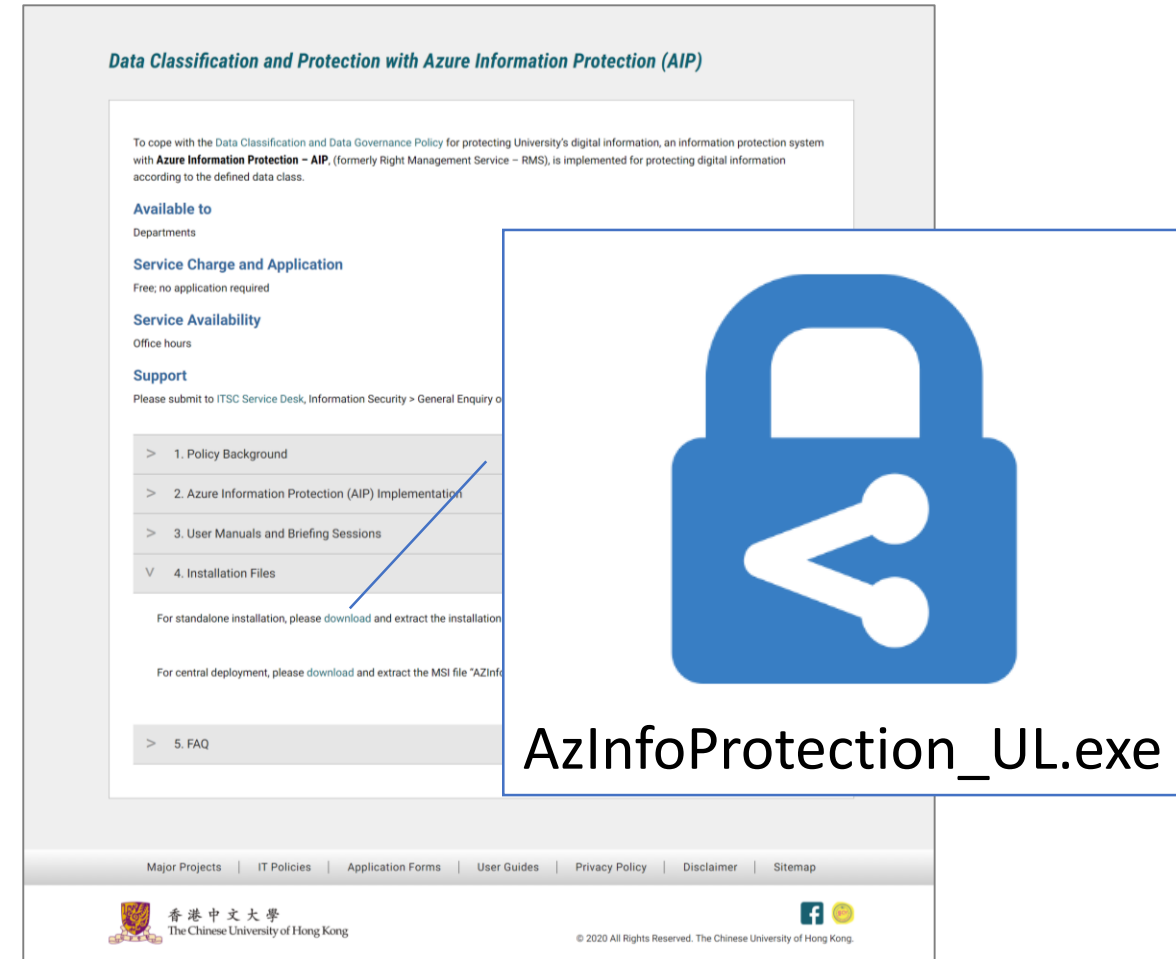
Old AIP Classic (v1) Client – No longer functional after 31 Mar 2021



New AIP Unified (v2) Client

Installing AIP Client at Home – Windows

- Download the installer from [ITSC Website](#)
- Install AIP client for full capability.
- If AIP client is not installed, use Office 365 to view and create protected Office documents, but not for PDFs.



The screenshot shows a webpage titled "Data Classification and Protection with Azure Information Protection (AIP)". The page contains the following sections:

- Available to:** Departments
- Service Charge and Application:** Free; no application required
- Service Availability:** Office hours
- Support:** Please submit to ITSC Service Desk, Information Security > General Enquiry

A navigation menu includes:

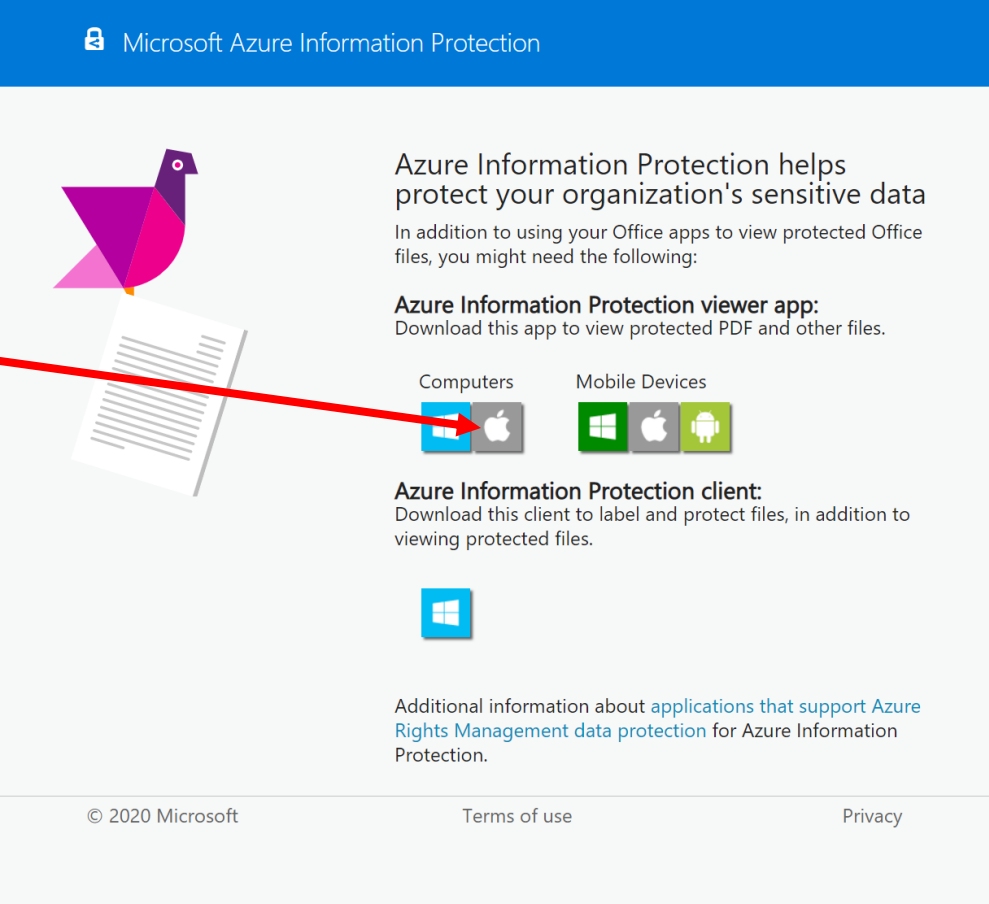
- > 1. Policy Background
- > 2. Azure Information Protection (AIP) Implementation
- > 3. User Manuals and Briefing Sessions
- ▼ 4. Installation Files
- > 5. FAQ

Below the menu, there are instructions for standalone and central deployment. A blue callout box highlights the "4. Installation Files" section and contains a blue padlock icon with a white keyhole and the text "AzInfoProtection_UL.exe".

At the bottom of the page, there is a footer with navigation links: Major Projects | IT Policies | Application Forms | User Guides | Privacy Policy | Disclaimer | Sitemap. The footer also includes the logo of The Chinese University of Hong Kong and the text "© 2020 All Rights Reserved. The Chinese University of Hong Kong."

Installing AIP Client at Home – MacOS




- Use Office 365 to view and create protected Word / Excel / PowerPoint files.
- Download [Azure Information Protection viewer](#) app to view protected PDF files.






Microsoft Azure Information Protection


Azure Information Protection helps protect your organization's sensitive data. In addition to using your Office apps to view protected Office files, you might need the following:

Azure Information Protection viewer app:
Download this app to view protected PDF and other files.

Computers:   

Mobile Devices:   

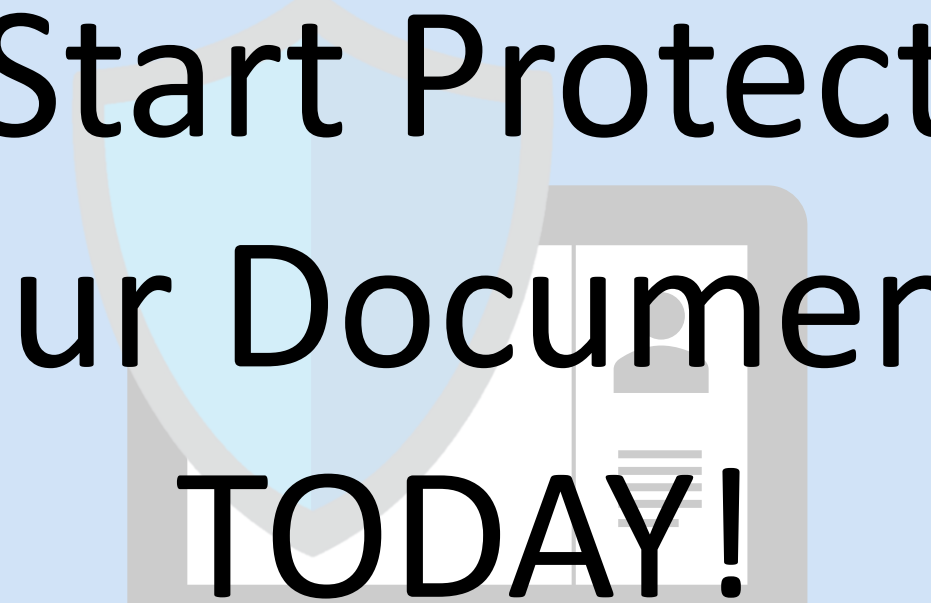
Azure Information Protection client:
Download this client to label and protect files, in addition to viewing protected files.



Additional information about [applications that support Azure Rights Management data protection](#) for Azure Information Protection.

© 2020 Microsoft Terms of use Privacy

Start Protect
Your Documents
TODAY!

A stylized illustration of a laptop computer. The screen displays a document with a header and several lines of text. A light blue shield with a white outline is positioned over the document, symbolizing protection. The laptop is rendered in a simple, flat style with a light blue background.

Demo

Create Protected Documents

- Word
- PDF

View Protected Documents

- By CUHK Staff
- By Outsiders

Send Protected Email

View Protected Email

- By CUHK Staff
- By Outsiders



Questions ?

Frequently Asked Questions

1. Can a protected document be created using a Project Account ?

- Currently AIP Service is enabled for staff accounts only.
- When a protected document is sent to project account (via email), users can open the protected document using his / her user identity.
- Project Account owner can send a request to ITSC to enable AIP Service on Project Account if needed.

Frequently Asked Questions

2. My faculty member used to forward all University emails to his/her personal email (e.g., Gmail). Does AIP also work in this scenario?
- Protected email does NOT work (requires @cuhk.edu.hk mailbox).
 - Protected attachment that included in an unprotected email works. Please be reminded that to view the protected document, users are required to either (1) install latest AIP viewer or, (2) from 7 Jan 2021 onwards, open the protected file using Office 2019/Office365.

Starting
7 Jan 2021

Frequently Asked Questions

3. Can I send a message to student / alumni / vendor and don't allow them to forward it?

- This is an advanced topic, achievable using Outlook on the web only and available on or after 7 Jan 2021.
- **CAUTION:** do not mix up with 'labels' which is targeted to CUHK staff

Label / Custom Security Level	Target	Read	Copy	Forward	Open by Outsider
Label: Strictly Confidential – All Staff	CUHK Staff (@cuhk.edu.hk)	Yes	No	No	No
Label: Confidential – All Staff	CUHK Staff (@cuhk.edu.hk)	Yes	Yes	Yes	No
Encrypt	Specific recipient	Yes	Yes	Yes	Yes (using OTP*)
Do Not Forward	Specific recipient	Yes	No	No	Yes (using OTP*)

* One-time passcode

Starting
7 Jan 2021

Frequently Asked Questions

3. (Continued)

- Compose a message in Outlook on the web. Click ellipsis (...) button > Encrypt > Do Not Forward.

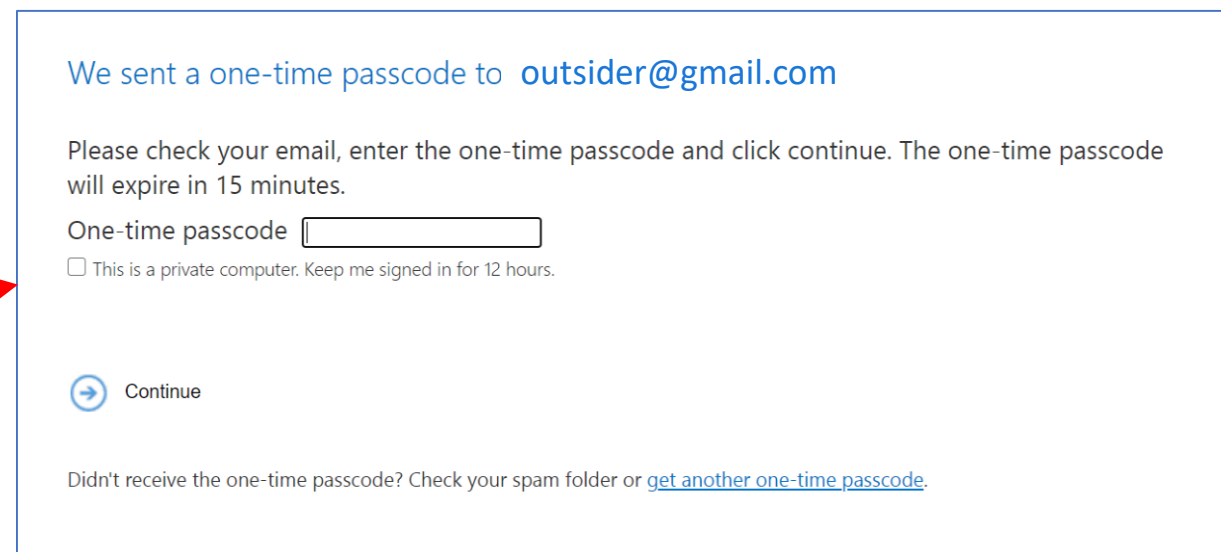
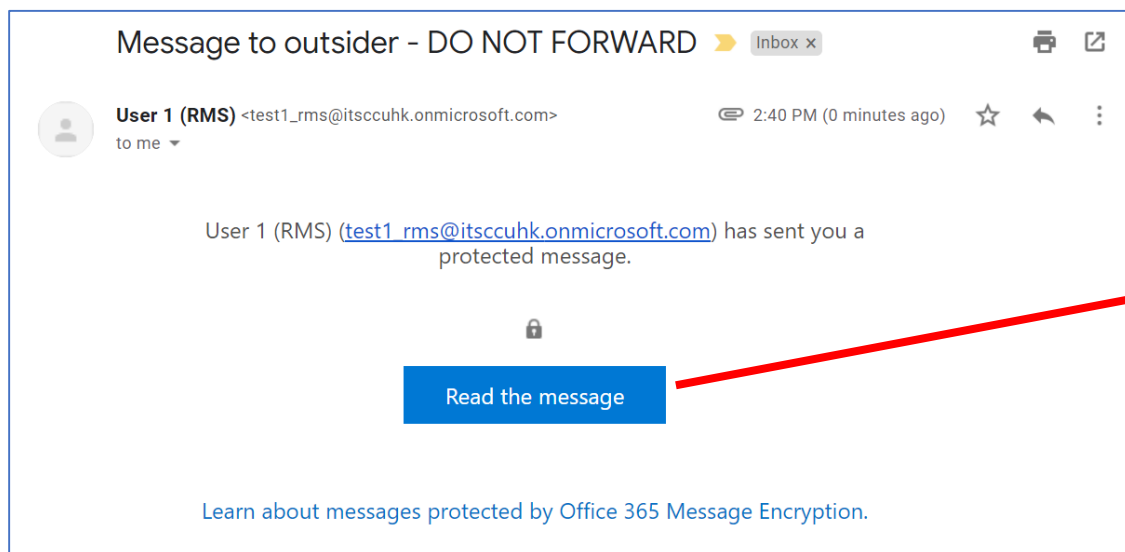
The screenshot shows the Outlook on the web interface. The top navigation bar includes the Outlook logo, a search bar, and buttons for 'New message', 'Send', 'Attach', 'Sensitivity', and 'Discard'. The ellipsis menu is open, showing options like 'Save draft', 'Insert signature', 'Show From', 'Encrypt', 'Set importance', 'Show message options...', 'Switch to plain text', and 'Check for accessibility issues'. The 'Encrypt' option is highlighted, and its sub-menu is open, showing 'Encrypt' and 'Do Not Forward' (which is checked). A red box highlights the 'Do Not Forward' option. A yellow callout box points to the ellipsis menu with the text: 'DON'T choose 'Sensitivity' as it doesn't apply to outsiders.'

Starting
7 Jan 2021

Frequently Asked Questions

3. (Continued)

- Recipient will be asked to enter a one-time passcode. The code will be sent to user's mailbox as soon as 'Read the message button' is clicked.



Starting
7 Jan 2021

Frequently Asked Questions

3. (Continued)

- Outsiders will see the message upon successful validation. Note Forward and Print buttons are disabled.

The screenshot shows an email interface for the user 'outsider@gmail.com'. The message is titled 'Message to outsider - DO NOT FORWARD'. The sender is 'User 1 (RMS) <test1_rms@itsccuhk.onmicrosoft.com>' with a timestamp of 'Today, 2:40 PM'. A grey banner across the message reads 'Do Not Forward: Recipients can't forward, print, or copy content.' Below this, a text box says 'Please do not forward this message.' A context menu is open over the message, showing options: 'Reply', 'Reply all', 'Forward', and 'Print'. The 'Forward' and 'Print' options are greyed out, indicating they are disabled. Two callout boxes with blue borders and lines pointing to the message and the disabled menu items contain the text: 'Unable to copy message' and 'Forward and Print buttons are disabled'.

outsider@gmail.com Sign Out ?

Message to outsider - DO NOT FORWARD

U1 User 1 (RMS) <test1_rms@itsccuhk.onmicrosoft.com>
Today, 2:40 PM
outsider@gmail.com

Do Not Forward: Recipients can't forward, print, or copy content.

Please do not forward this message.

Reply all | v

Reply
Reply all
Forward
Print

Unable to copy message

Forward and Print buttons are disabled

Frequently Asked Questions

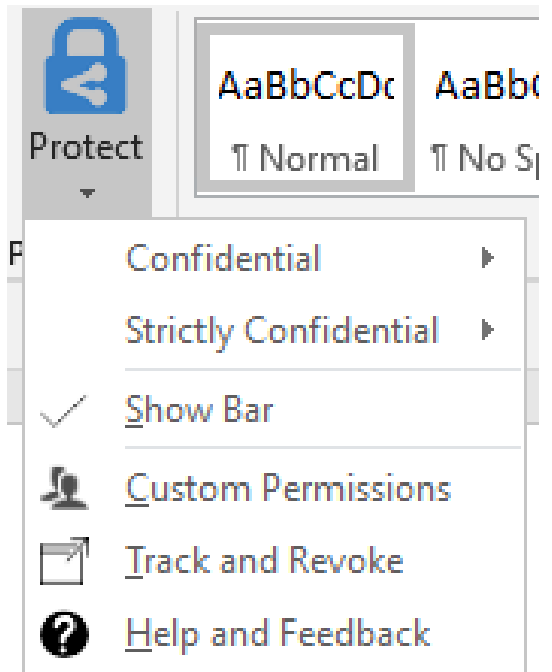
4. Will I still be able to open documents protected using 'old' (v1) client after 31 March 2021 ?
- Yes, documents protected using 'old' client could still be opened after 31 March 2021.
 - No actions needed for files protected using 'old' client.

Frequently Asked Questions

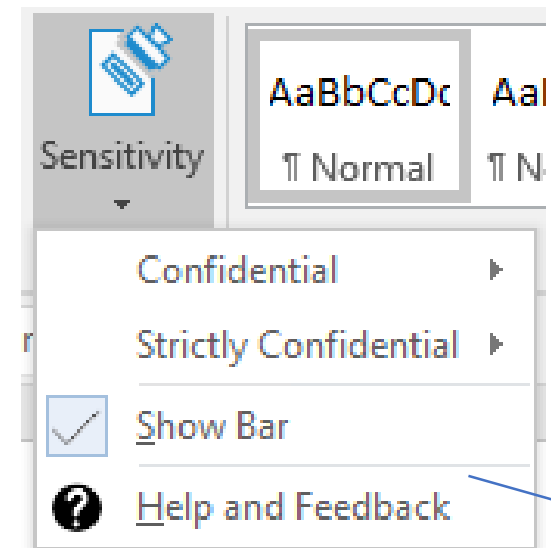
- 5. Must I keep my computer online in order to open protected documents ?
 - Offline access is allowed for documents protected using Classification Label

Classification Label	Offline Access
Strictly Confidential	1 day
Confidential	7 days

Appendix 1: Major Changes in Unified Labeling (new) Client



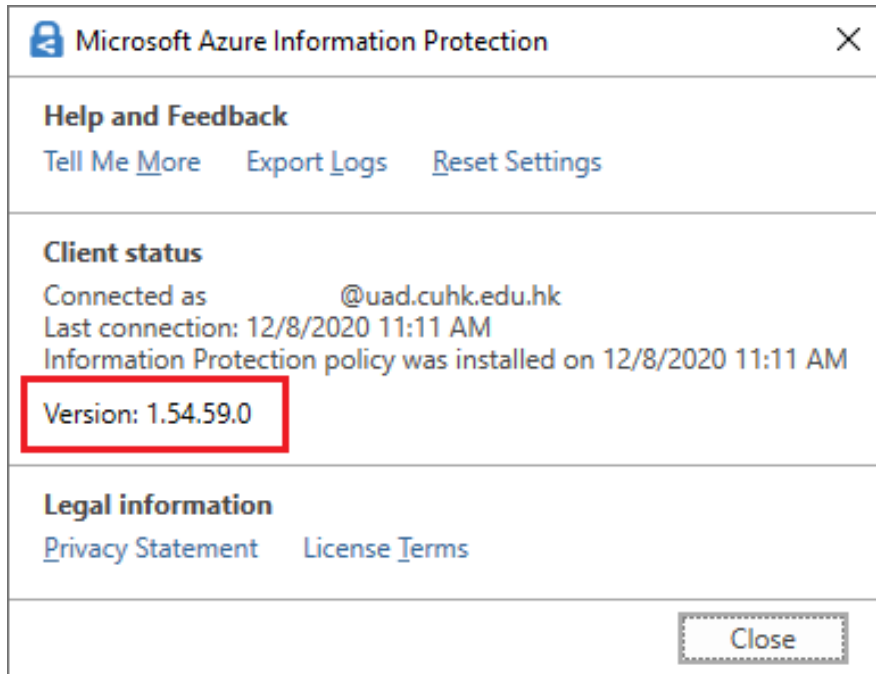
Classic Client (v1)



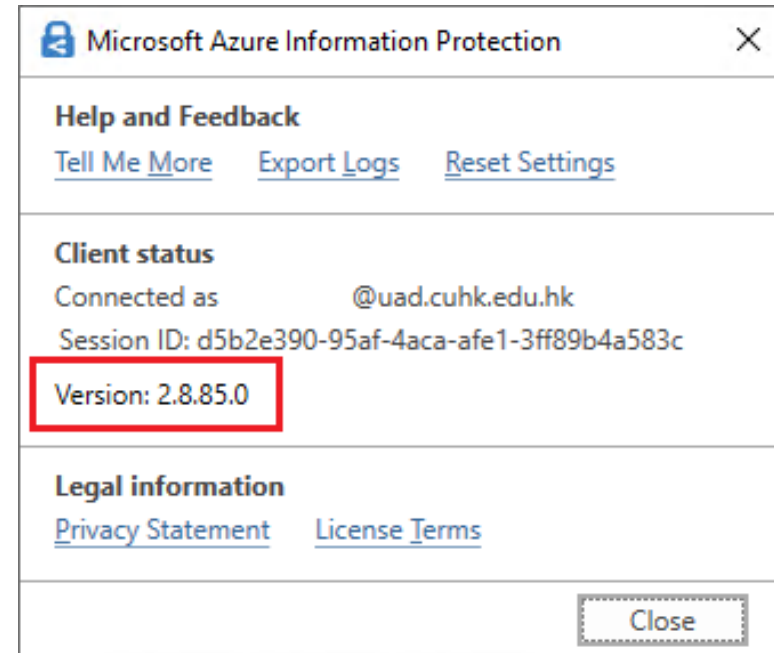
'Custom Permissions' no longer accessible from Office app
'Track and Revoke' is no longer supported

Unified Labeling Client (v2)

Appendix 1: Major Changes in Unified Labeling (new) Client



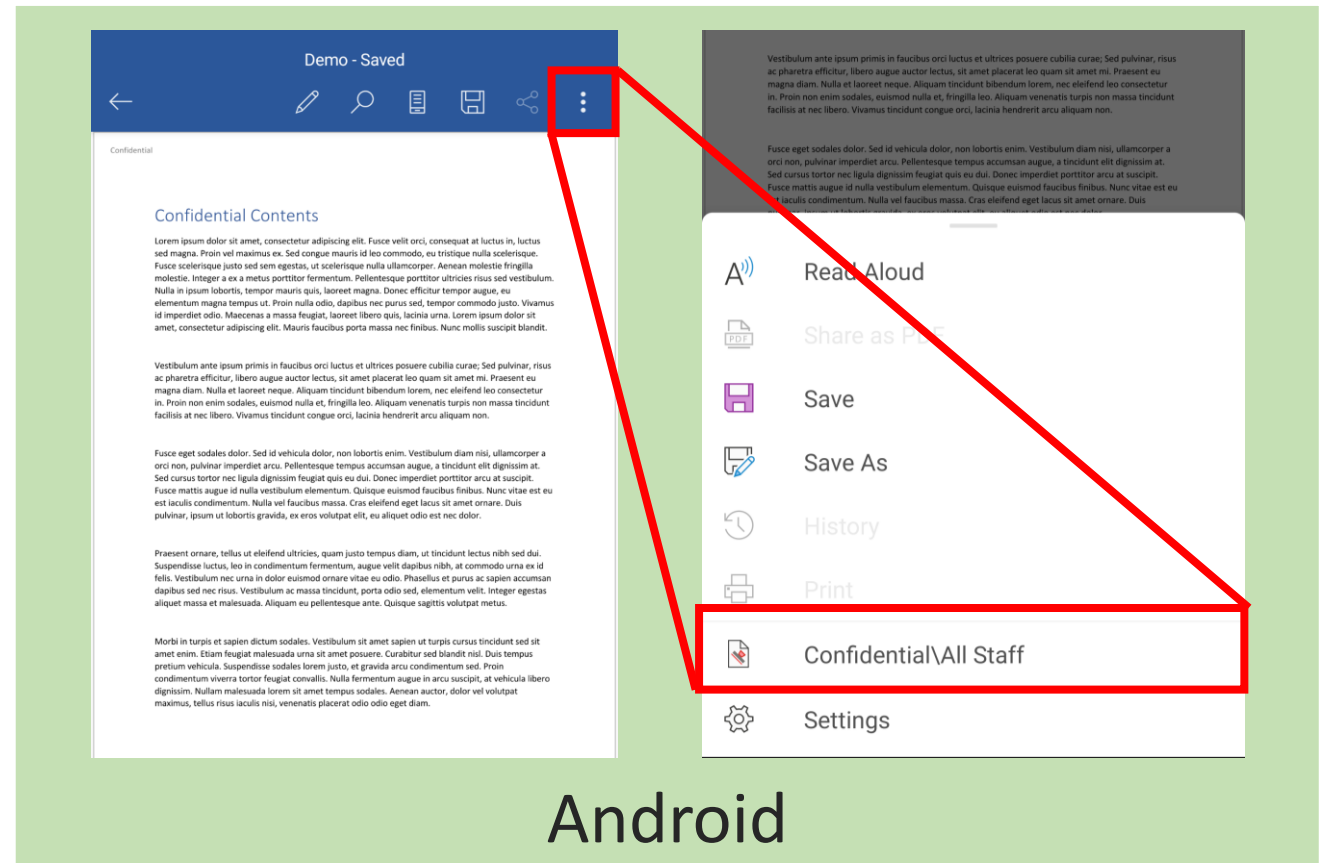
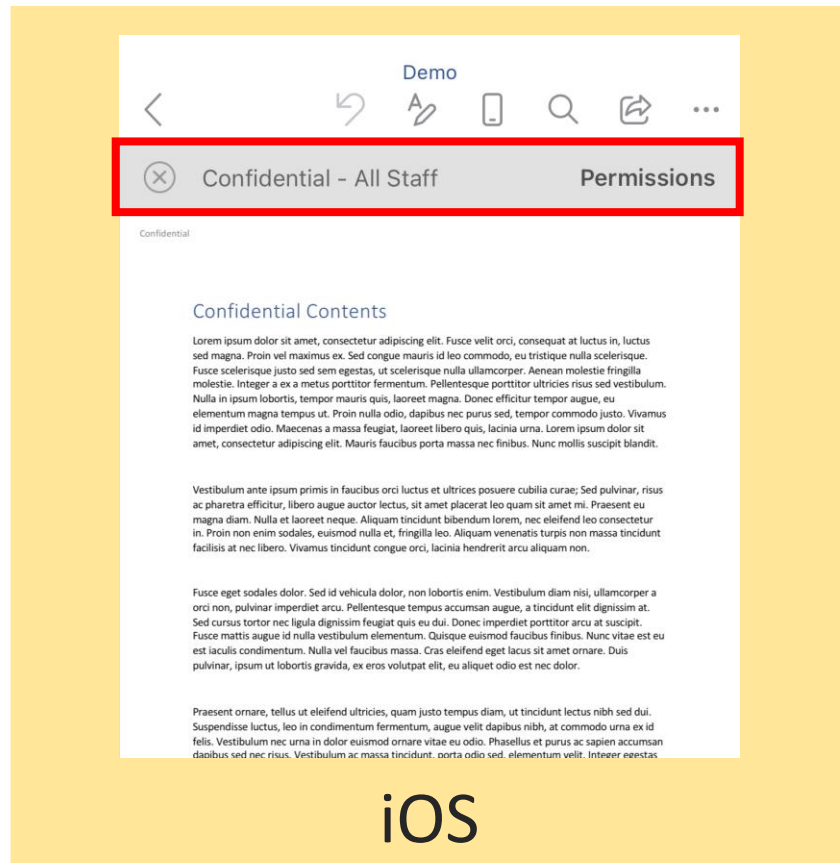
Classic Client (v1)



Unified Labeling Client (v2)

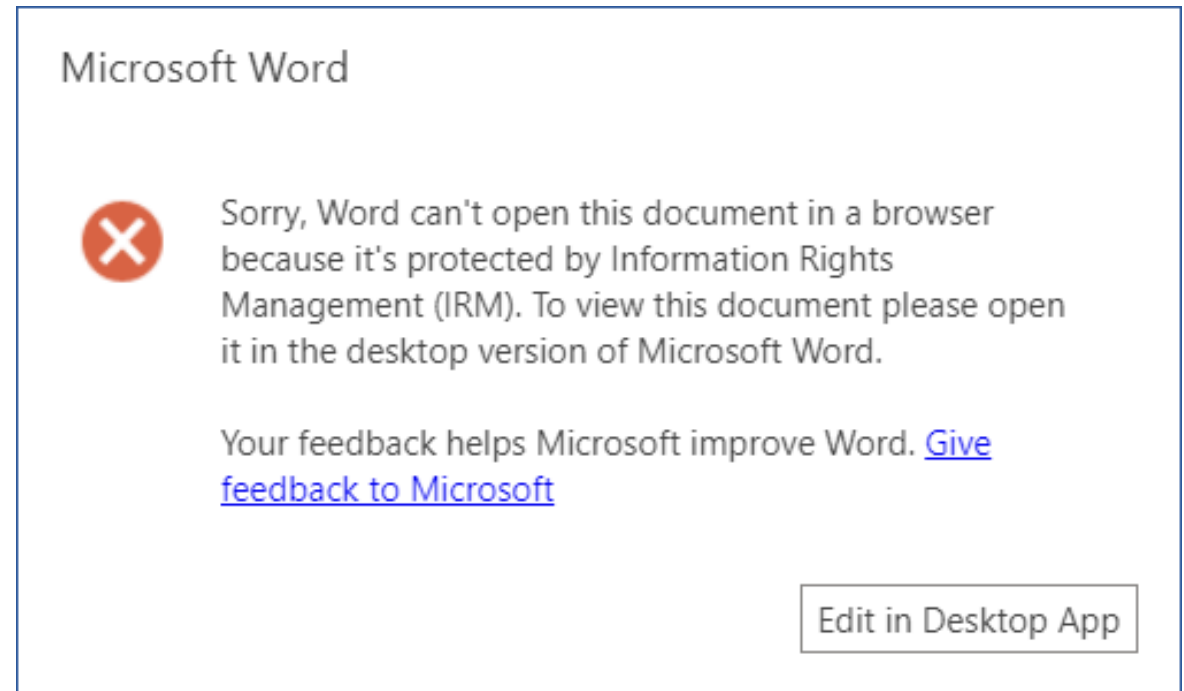
Appendix 2: Open Office Documents from Mobile Device

- Use official **Microsoft Office apps**.



Appendix 3: Open Office Documents in Office 365, OneDrive and SharePoint (web)

- Currently **not supported**. Please **open protected files using desktop or mobile device**.
- Same for OneDrive and SharePoint unless files are opened in desktop app via a network drive.

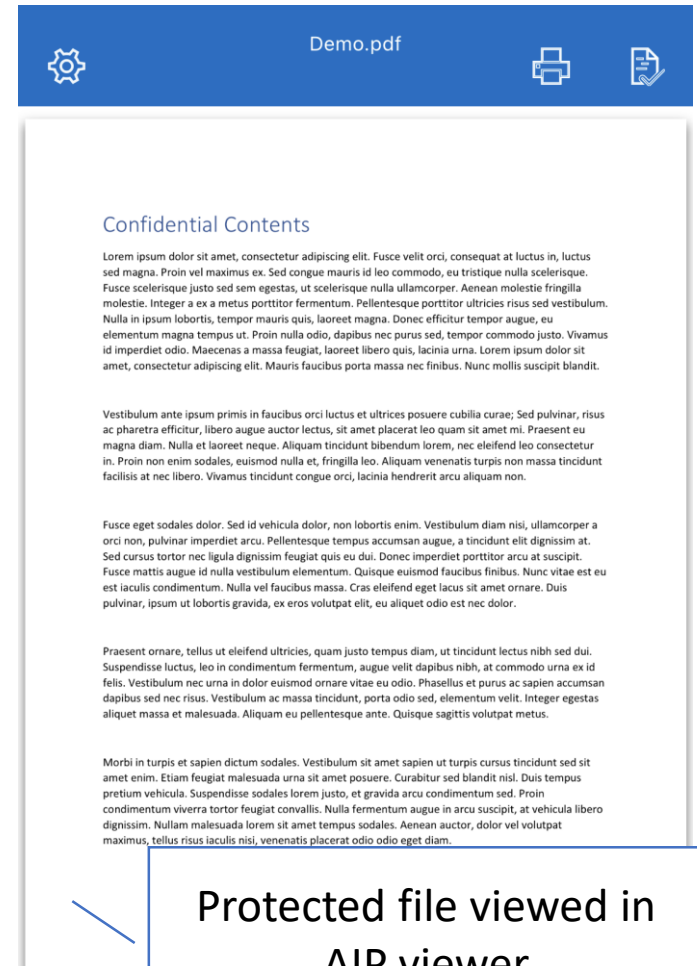
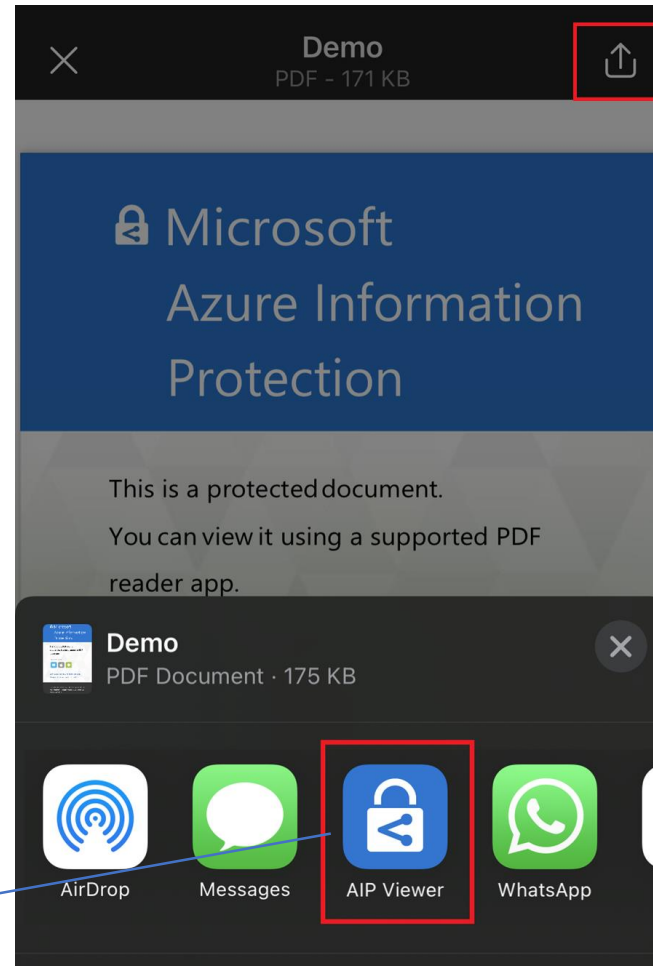


Appendix 4: Open PDF Documents using Azure Information Protection Viewer (iOS / Android)

Starting
7 Jan
2021

- Install Azure Information Protection Viewer ([iOS](#) / [Android](#)) prior opening protected PDF files.
- Open protected PDF files in AIP Viewer app.

iOS: 'Share file via...' and pick AIP Viewer



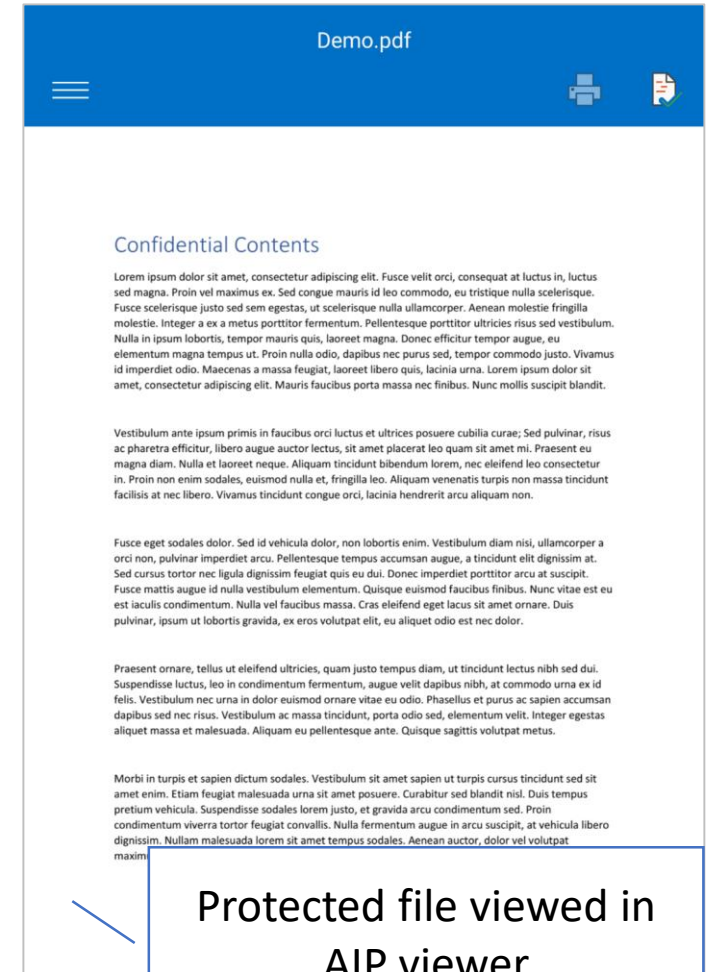
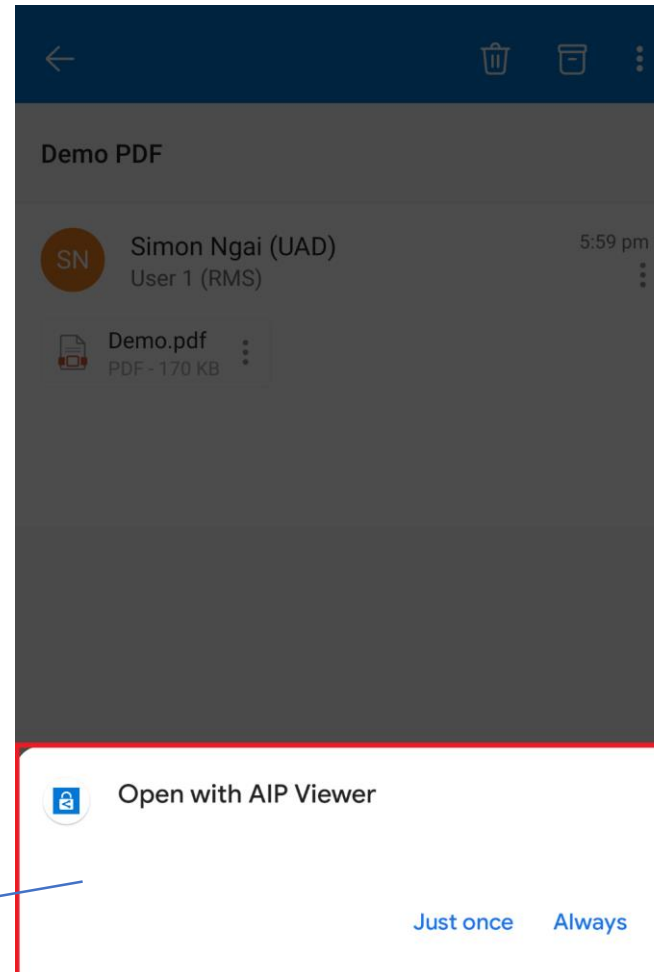
Protected file viewed in AIP viewer

Appendix 5: Open PDF Documents using Azure Information Protection Viewer (iOS / Android)

Starting
7 Jan
2021

- Install Azure Information Protection Viewer ([iOS](#) / [Android](#)) prior opening protected PDF files.
- Open protected PDF files in AIP Viewer app.

Android: Choose AIP Viewer when prompted



Appendix 6: Send Protected Email (Tips)

- Put **#confidential** and **#strictlyconfidential** hashtag in your email subject to achieve the same result.
- It also works when sending email using third-party email clients.

Simon Ngai (UAD) | User 1 (RMS); User 2 (RMS); User 3 (RMS) ▾

Email with unprotected word attachment Subject tag #strictlyconfidential

Strictly Confidential - All Staff - This file contains data that has been classified as 'Strictly Confidential' and viewable by staff only.
Permission granted by: demouser@cuhk.edu.hk

Classic 2019 Unprotected.docx
744 KB

Confidential Contents

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce velit orci, consequat at luctus in, luctus sed magna. Proin vel maximus ex. Sed congue mauris id leo commodo, eu tristique nulla scelerisque. Fusce scelerisque justo sed sem egestas, ut scelerisque nulla ullamcorper. Aenean molestie fringilla molestie. Integer a ex a metus porttitor fermentum. Pellentesque porttitor ultricies risus sed vestibulum. Nulla in ipsum lobortis, tempor mauris quis, laoreet magna. Donec efficitur tempor augue, eu elementum magna

Subject includes appropriate hashtag

Classification label applied when viewed by recipient

Attachment and content will have corresponding restrictions applied, through visual marking is not available