ePrism Email Security

EdgeWave™

Personal Dashboard User Guide - V11.1

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Contents

Introduction

The Personal Dashboard is a Web portal for managing your email filtering account. It allows you to create and change your password, select your Spam Digest options, configure your mail filtering preference settings, manage your whitelist and blacklist, and run reports on quarantined messages.

The Personal Dashboard has four tabs:

- **Messages Tab**: View, delete, and release filtered messages.
- **Settings Tab**: Manage your Spam Digest settings, such as frequency, format, content, and sort order.
- **Policies Tab**: Manage your filter settings.
- **Status Tab**: Reports of your mailbox name, aliases, and digest status.

> **Note**: Depending on the settings applied by your email administrator, some of the features described in this guide may not be available to all users.

Accessing Your Personal Dashboard

There are two ways to log into the Personal Dashboard:

- with a link
- through your Spam Digest

> **Note**: Depending on the settings applied by your email administrator, you may or may not need to log in with a password. For systems that do not require a password, you can optionally create a password for your account for added security.

Accessing Your Personal Dashboard through a Link

When you started your email account, or when the mail system began using the filtering system, your email administrator sent you a link to your Personal Dashboard.

To access your Personal Dashboard through a link:

- Click the link or copy and paste it into your Web browser address field. The Personal Dashboard screen opens in your browser.

Accessing Your Personal Dashboard through the Spam Digest

If you receive the Spam Digest, you can access the Personal Dashboard directly from a link in the digest.

To access your Personal Dashboard through the Spam Digest:

- Click the **My Account** link in the Spam Digest. The Personal Dashboard screen opens in your browser.

Creating a Password

Depending on the settings applied by your email administrator, you may need to create a password to enter the Personal Dashboard. There are two ways to create a password:

- at the Personal Dashboard Login screen
- from inside the Personal Dashboard

Creating a Password at Log In

To create a password at log in:

1. With your Web browser, follow the link provided by your email administrator to the Personal Dashboard login page. If you need to create a password, the Personal Dashboard Login screen opens.

2. Click **Signup**. The Personal Dashboard Signup screen opens.

3. Enter your email address.

4. Enter and reenter your password. Your password must contain at least six characters.

5. Click **Signup**.

    Note: Contact your email administrator if you receive an error message after trying to sign in.

Creating a Password in the Personal Dashboard

For systems that do not require a password, you can optionally create a password for your account for added security.

To create a password in the Personal Dashboard:

1. Open your Personal Dashboard. See Accessing Your Personal Dashboard for more information.

2. From the top of any screen, click **Change Password**.

3. Leave the Old Password text box blank, and enter and reenter your password. Your password must contain at least six characters.

4. Click **Save**.

Changing Your Password

You can modify your password as needed.

To modify a password:

1. Open your Personal Dashboard. See Accessing Your Personal Dashboard for more information.

2. From the top of any screen, click **Change Password**.

3. Enter your old password.

4. Enter and reenter your new password. Your password must contain at least six characters.

5. Click **Save**.

    Note: Contact your email administrator if you receive an error message after trying to change your password.

Viewing the Online FAQ

The Personal Dashboard has an online FAQ that answers the most commonly asked questions. It also explains how the email filtering system works. Enter the following link into your browser to open the online FAQ:

http://www.edgewave.com/docs/guide/ss/dashboard-faq/Index.htm

Messages Tab

Quarantined messages are the messages that the system has filtered out based on your filtering options. Quarantined messages are archived for 35 days online. After 35 days, quarantined messages are automatically deleted.

From the Messages tab you can review, release, or delete messages that were caught and put in your quarantine. If enabled by your administrator, you can toggle between viewing inbound or outbound quarantined messages.
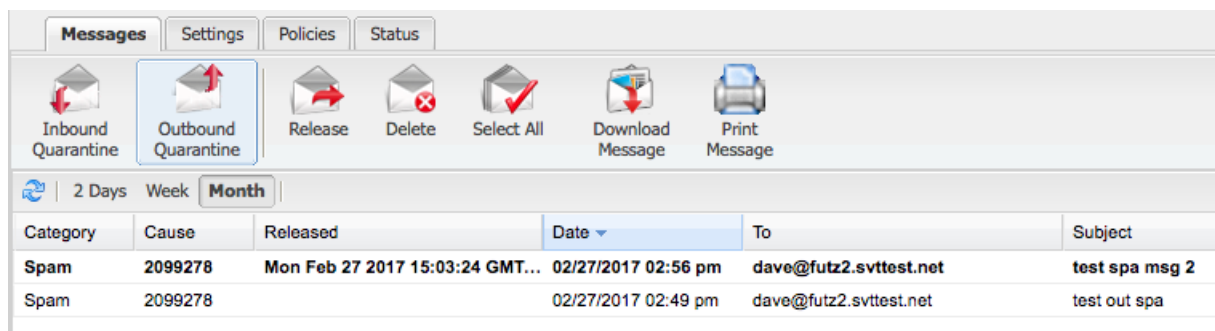

Figure 1. Messages tab

If email continuity is licensed by your organization and enabled, you can also manage your email inbox from the Messages tab. See Email Continuity for details.

Note: On the rare occasion when a significant network issue occurs, a link to a system status alert displays in the status bar.

Changing the Messages List Display

On the Messages tab there are several ways to sort and filter the list. You can also change the attributes that are shown.

Sorting and Filtering the Message List

While viewing the list of quarantined messages on the Messages tab, you can limit the messages in the display by received date. You can also sort the list by any of the columns, either in ascending or descending order.

To limit the display:

* Select the timeframe for messages to view. You can show messages received in the last 2 days, week, or month (all messages).
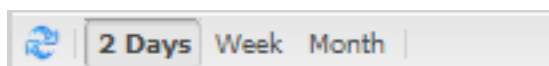

Figure 2. Time selection for messages list

To sort the list of quarantined messages:

- Click a column heading to sort by that column in ascending order.
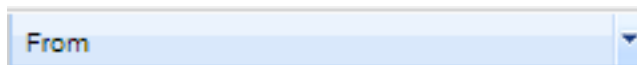- Click a second time to sort by that column in descending order.


Figure 3. Order of messages in the list

Viewing Inbound and Outbound Messages

Some administrators configure the system to filter outbound email messages. You can perform the same actions on outbound filtered messages as on inbound messages in the Personal Dashboard.

Note: Depending on the settings applied by your email administrator, the outbound filtering option may or may not be available to all users.

To view outbound filtered messages:

1. Click the **Messages** tab.

2. Click the Outbound Quarantine icon. Outbound filtered messages display.
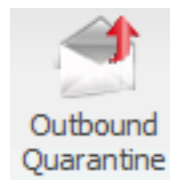
Searching for Messages

You can search the quarantine to locate individual messages. Use the search tool to locate email addresses, names, or any other text string.

The search tool searches on all the attribute fields listed in the Messages tab. You can use search to look for mail you think may have been mistakenly filtered. Note that the search does not include attribute fields that are not shown in the quarantine list.

For instance, you can check to see if a message from your Aunt Agnes is in the quarantine. Or you can search for a specific term that may commonly trigger messages to be filtered.

To search the quarantine for messages:

1. Click the **Messages** tab.

2. In the search box (at the top right of the screen), enter the term to be searched.
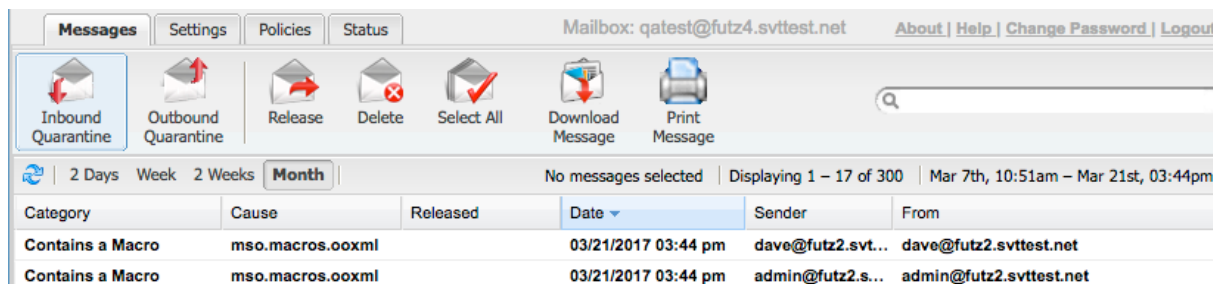

Figure 4. Search box

3. Press Enter. All messages that contain the search term display in the quarantine. All messages that do NOT contain that term are temporarily hidden from view.

Clearing the Filtered Message Display

When you filter the quarantine display using the Search function, only messages that contain that search term display. To show all filtered messages, clear the search box.

To clear the filtered message display:

1. Click the **Messages** tab.

2. In the search box, delete all text.

3. Press Enter. All quarantined messages now display.

Displaying Message Attributes

All email messages have a number of attributes. By default, quarantined messages in the Personal Dashboard display the message date, removal date, category,type of message (category), the reason it was caught (cause), the sender, the From field of the message, and the message subject. You can remove any of the default attributes from the quarantine message display. You can also add other attributes to the display.

To change display of quarantined message attributes:

1. Click the **Messages** tab.

2. Click the downward shaped triangle on the right of a column heading.

3. Click **Columns**.

4. Select or clear the attribute check boxes as needed. The selected attribute columns display.

Viewing a Message

You can view the contents of a quarantined message from the Personal Dashboard.

To view a quarantined message:

1. Click the **Messages** tab.

2. Select the message to view. The message contents display on the bottom of the screen.

Releasing Messages

You can release one or more messages from the quarantine to be delivered to your email inbox.

To release a quarantined message:

1. Click the **Messages** tab.

2. Select one or more messages to release. To release more than one message:
   - Use Shift+Click to select adjacent messages.
   - Use Ctrl+Shift to select non-adjacent messages.

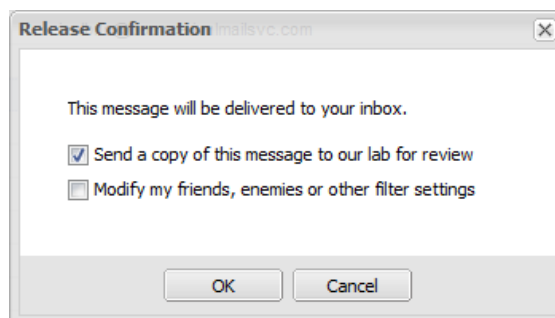3. Click the Release icon. You are asked to confirm.

Figure 5. Release Confirmation

4. Check the boxes as applicable and click **OK**.
   - If you want to send a copy of the message to EdgeWave to improve filter quality, check the box.
   - If you want to update your friends/enemies list or policies, check the box. A wizard guides you through additional selections to update the lists. Follow the instructions, clicking **Next/Finish** on each screen.

   Note: When the MIME from: header differs from the SMTP envelope sender both are included in the list of senders that can be added to the whitelist.

   The messages are sent to your email inbox.

Deleting Messages

You do not need to delete messages from your quarantine. All messages are automatically deleted after 35 days. You can, however, manually delete messages from your quarantine if you like.

To delete a quarantined message:

1. Click the **Messages** tab.

2. Select one or more messages to delete. To delete more than one message:
   - Use Shift+Click to select adjacent messages.
   - Use Ctrl+Shift to select non-adjacent messages.

   Note: To delete *all* quarantined messages, click the Select All icon. This selects all messages in the Messages screen plus any other quarantined messages, which may not be visible.

3. Click the Delete icon. The messages are deleted.

Selecting All Messages

You can select all quarantined messages in one step.

To select all quarantined messages:

1. Click the **Messages** tab.

2. Click the Select All icon. This selects all messages in the Messages screen plus any other quarantined messages, which may not be visible.

Downloading a Message

Messages can be downloaded to your computer in .eml format. Many email clients use this format to import files. For more information on the .eml format, see http://www.fileinfo.com/extension/eml.

To download a quarantined message:

1. Click the **Messages** tab.

2. Select the message to download.

3. Click the Download icon. The message is downloaded.

Email Continuity

Email Continuity provides access to your email inbox when your regular email server is down. If your organization has licensed this feature AND your system administrator has enabled it, you can use the Messages tab of the Personal Dashboard to manage all of your incoming messages.

When Email Continuity is active, an additional button, Inbox, appears on the Messages tab.

Note: Depending on the settings applied by your email administrator, the Email Continuity inbox may not be available to all users.

To access your inbox:

1. Click the **Messages** tab.

2. Click the Inbox icon. The messages in your inbox display.

Note: The Email Continuity inbox does not include messages that have been released from quarantine.

From the inbox you can create new messages, reply to messages, and forward messages. Use the buttons at the top of the screen to manage your messages:

Compose a new message.

Select a message in the list and click this button to reply to the selected message.

Select a message in the list and click this button to reply to the selected message, including all recipients on the reply.

Select a message in the list and click this button to forward the selected message.

Select a message in the list and click this button to download the selected message.

Settings Tab

The Spam Digest is an emailed version of a quarantine report. Within the Spam Digest you can review and release any spam that is blocked from your email inbox. The Settings tab is where you configure the Spam Digest properties.

Configuring Digest Settings

Depending on the settings applied by your email administrator, you may or may not be able to adjust your spam digest settings.

To configure digest settings:

1. Click the **Settings** tab.

2. Click a radio button to select a delivery frequency. Options are Never, Daily, Weekly, or Monthly.

3. From the drop-down list, select a report format. Options are HTML, Plain Text, or Multipart.

4. From the drop-down list, select the report contents. Options are:
   • Summary: Displays the counts of each type of message.

- Green Zone: Displays only mail from the green zone (junk).

- Yellow and Green Zones: Displays mail from the yellow zone (blank, forged, foreign, attachments) plus mail from the Green Zone (junk).

- Red, Yellow & Green Zones: Displays all mail from the quarantine.

5. From the drop-down list, select the message sort order. Options are Date & Time, Size, Sender, or Subject.

6. Optional: Select the Ascending check box to sort the messages in ascending order.

7. In the Time Zone Setting area, click on the section of the map that contains your location. Then select your time zone from the list.

Digest Settings

Delivery Frequency:	○ Never ● Daily ○ Weekly
Report Format:	HTML
Report Content:	Red, Yellow & Green Zones
Order List By:	Date & Time ☑ Ascending

Time Zone Setting

Time Zone:	America/Los Angeles
Your Date/Time:	Jul 8th, 11:38am

Figure 6. Settings tab

Policies Tab

The Policies tab is where you configure how different types of messages are processed.

Note: The filter settings configured by your email administrator are tagged with the Administrator Settings icon. These settings cannot be removed but they can be modified if permitted.

Configuring Message Filtering

Depending on the settings applied by your email administrator, you may or may not be able to configure your email filtering options. Valid filtering options are:

- **Allow**: Allows the message to pass through the filter and delivers the message to your email inbox.
- **Markup**: Adds a subject tag to the Subject line of the email message. Subject tags are short bits of text (up to twenty characters) prepended to the subject line of an email message to alert you that a message has been flagged as suspicious. See Configuring Subject Tags for more information.
- **Quarantine**: Quarantines the message.
- **Block**: Deletes the message. Blocked messages are not recoverable from the quarantine list.

> **Note**: The filter settings configured by your email administrator are tagged with the Administrator Settings icon. These settings cannot be removed but they can be modified if permitted.

To modify your filtering options:

1. Click the **Policies** tab.

2. From the drop-down list below each message type, select the filtering option.

Figure 7. Configuring message filtering

Configuring Subject Tags

Subject tags are short bits of text (up to twenty characters) prepended to the subject line of an email message to alert you that a message has been flagged as suspicious. For example, you can configure the mail from invalid senders (the Forged: field) to say "Fake:" to alert you that the message is not from the sender it claims to be from. In this example, the tagged message in your mailbox might read "Fake: Your New Store Gift Card!"

> **Note**: EdgeWave recommends ending the subject tag with a colon. When most mail programs sort on the subject line they ignore the text before a colon and sort on the content of the subject line.

To configure a subject tag:

1. Click the **Policies** tab.

2. Depending on the message type, do one of the following:

- For all message types other than Foreign and Attachments, from the drop-down list next to the message type to mark up, select Markup.

- For Foreign and Attachments, right-click the type to mark up and select Markup.

A new text entry box appears on the right of the drop-down list. This text box may have a default subject tag.

3. Optional: Clear the default subject tag and type your text entry into the box.

Selecting Foreign Language Options

Depending on the settings applied by your email administrator, you may have the option to block email that contains foreign characters. A large volume of spam is transmitted using Russian, Cyrillic, Chinese, Korean, and Japanese non-English character sets. If you normally receive email in these languages, configure your settings so that these messages pass through the filters.

By default, the system allows mail with non-English language character sets but adds a subject tag of FOREIGN: before the mail subject line. Foreign language filtering options can be applied individually on a per-language basis.

You can filter messages with foreign language content with the same options described in Configuring Message Filtering. Additionally, you can remove a language from special treatment by deleting the language. Deleting the language means that EdgeWave processes the message as it would with any other message, without any special rules.

> **Note**: You will not be able to delete a language if your email administrator has blocked that option. If so, a pop-up window alerts you that the filtering option has been reset to the administrator default.

You can later add a language that has previously been deleted.

To modify foreign language filtering options:

1. Click the **Policies** tab.

2. In the Foreign section (Yellow Zone), click a language to select it.

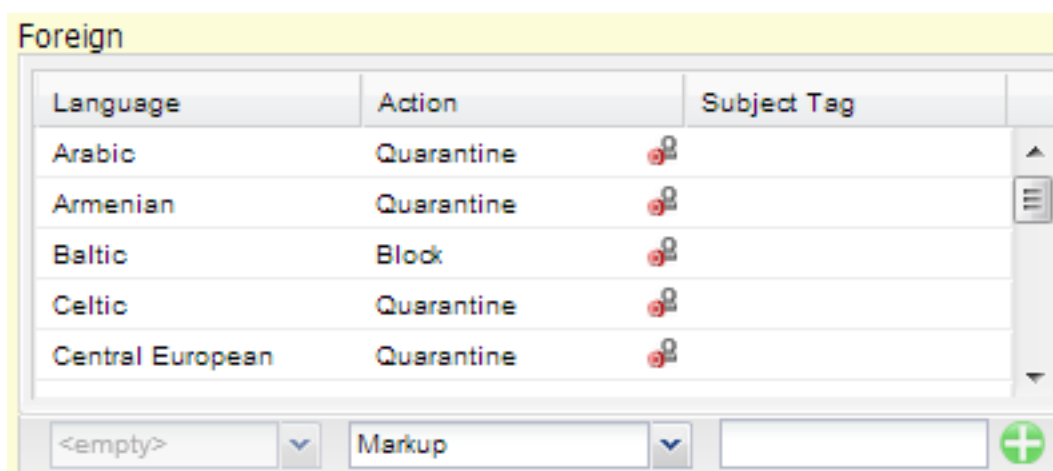3. Right-click the language and select a filtering option.

Figure 8. Foreign Language options

To delete a foreign language:

1. Click the **Policies** tab.

2. In the Foreign section (Yellow Zone), right-click a language to delete.

3. Click **Delete**. A confirmation message opens.

4. Click **OK**.

To add a deleted language:

1. Click the **Policies** tab.

2. In bottom left of the Foreign section, select a deleted language.

3. Select the filtering option from the drop-down list. Options are Allow, Markup, Quarantine, and Block.

4. For a marked up attachment, enter a subject tag to prepend to the subject line. See Configuring Subject Tags for information about subject tags.

5. Click + (the plus sign) button to add the language.

Selecting Attachment Options

You can filter messages with attachments with the same options described in Configuring Message Filtering. Additionally, you can add a new attachment type to filter.

To add an attachment type

1. Click on the **Policies** tab.

2. In the Attachments (Yellow Zone) section, enter the file extension of the attachment to filter.
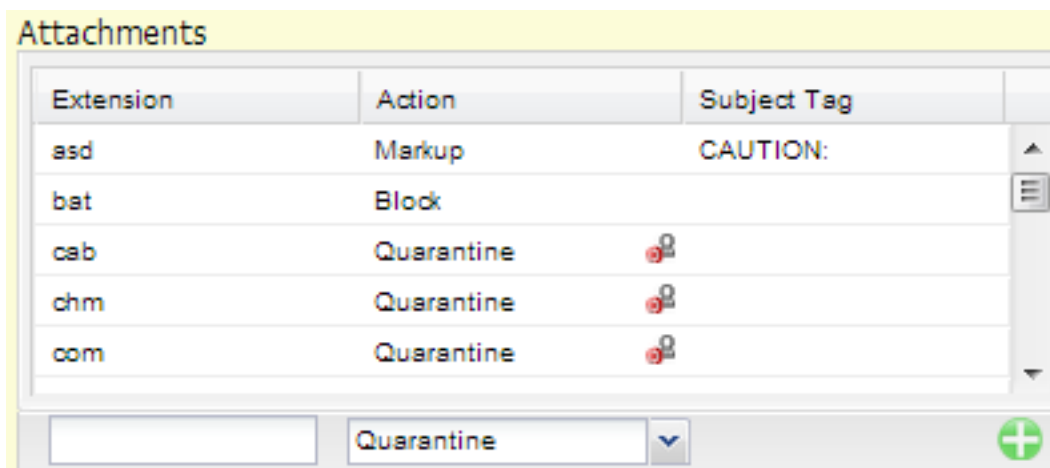

Figure 9. Attachment options

3. Select the filtering option from the drop-down list. Options are Allow, Markup, Quarantine, or Block.

4. For a marked up attachment, enter a subject tag to prepend to the subject line. See Configuring Subject Tags for information about subject tags.

5. Click + (the plus sign) button to add the attachment type.

Filtering by Sender

The filtering system has Friends (whitelist) and Enemies (blacklist) options to filter by email address, domain name, or IP address.

- Friends: Mail from these addresses and domains will not be filtered for spam.
- Enemies: Mail from these addresses and domains will be quarantined.

Whitelist and blacklist entries are not required to ensure that you do not receive spam. If there is a conflict between your whitelist entry and an identical blacklist entry for the entire domain set by your email administrator, the whitelist setting takes precedence.

We do not recommend using whitelists and blacklists to manage email accounts because spammers have adopted techniques to send email from addresses within your own domain (including your own email address). Whitelists, in this case, would override the spam filter rule and result in the spam and viruses being delivered to you even though the system had identified them as spam. Similar unintended consequences can result from the use of blacklists.

To add to the Friends list (whitelist):

1. Click the **Policies** tab.

2. In the text box in the Friends area, enter the email address, domain name, or IP address to add to the Friends list.

3. Click + (the plus sign) button to add it to the Friends list.

To add to the Enemies list (blacklist):

1. Click the **Policies** tab.

2. In the text box in the Enemies area, enter the email address, domain name, or IP address to add to the Enemies list.

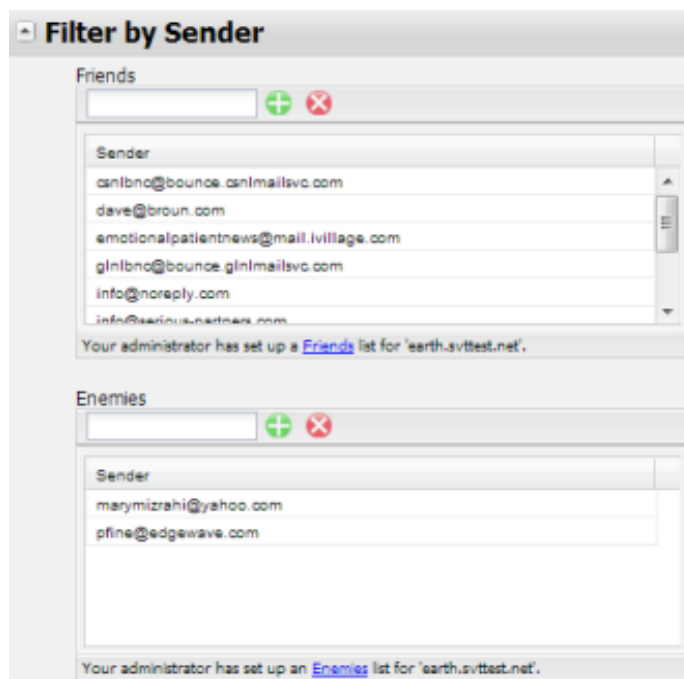3. Click + (the plus sign) button to add it to the Enemies list.

Figure 10. Friends and Enemies lists

To remove an entry from the Friends list (whitelist):

1. Click the **Policies** tab.

2. In the Friends area, select the email address, domain name, or IP address to remove from the Friends list.

3. Click - (the minus sign) button to add it to the Friends list.

To remove an entry from the Enemies list (blacklist):

1. Click the **Policies** tab.

2. In the Friends area, select the email address, domain name, or IP address to remove from the Enemies list.

3. Click - (the minus sign) button to add it to the Enemies list.

Viewing the Administrative Friends and Enemies List

Your email administrator may or may not have set up a Friends (whitelist) or Enemies (blacklist) list for all users. You can view this list, but cannot make any changes to it. If you feel that something is whitelisted or blacklisted by mistake, contact your email administrator.

To view an administrative Friends list (whitelist):

1. Click the **Policies** tab.

2. In the Filter by Sender section, beneath the Friends list, click the Friends link. The list appears in a pop-up window.

To view an administrative Enemies list (blacklist):

1. Click the **Policies** tab.

2. In the Filter by Sender section, beneath the Enemies list, click the Enemies link. The list appears in a pop-up window.

Status Tab

The Status tab is a read-only page that shows:

*   Your primary email address and aliases

*   The last time your digest was sent

*   The number of messages quarantined since the start of email filtering, in text and graphical format

Viewing the Account Status

To view account status

*   Click the **Status** tab.

The screenshot below shows an example Status tab. It shows the mailbox name and the aliases. The most recent digest was sent on November 4 and it contained 5 quarantined messages.

Mailbox

*   carmenb@earth.svttest.net

Aliases

*   alias1@earth.svttest.net
*   whisper@earth.svttest.net

Digest

Last Digest Sent: 11/04/2012 12:30 am
Last Digest Cycle: 11/4/2012
Quarantined: 5

Figure 11. Status tab