proofpoint
essentials

End-User Guide
Proofpoint Essentials

Preface

About this Guide

This guide provides introduces end-users to Proofpoint Essentials.

Intended Audience and Prerequisite Knowledge

This guide is intended for end-users who interact with Proofpoint Essentials through a quarantine digest or by accessing the web-based user interface to manage personal preferences.

Important Terms

There are several terms used in this document that are highlighted here for reference.

Organization

- The term "organization" refers to your type of account your company has been setup within Proofpoint Essentials.

Organization Administrator

- A type of user who is responsible for managing the "organization".

End-User

- A type of user whose email is filtered by Proofpoint Essentials, receives a quarantine digest email and has rights to access Proofpoint Essentials to manage their personal preferences.

Quarantine

- A term used to describe email that is not delivered to its intended recipients and is instead held by Proofpoint Essentials due to either your companies spam settings or by a custom filter.

Quarantine Digest

- An email delivered on regular basis to users whose email is being filtered by Proofpoint Essentials when email intended for that user has been blocked for delivery.

Filter

- A feature that allows a company to analyze incoming and outgoing email and take action based on the contents of the email.

Safe Sender List

- A list of senders whose email should by-pass spam filtering and be delivered to the users inbox.

Blocked Sender List

- A list of senders whose email should be quarantined.

Using Proofpoint Essentials

Accessing the User Interface

The Proofpoint Essentials user interface is a secure web-based portal that you can use to:

- Manage your user information.
- Update your preferences.
- Create and manage your safe and blocked sender lists.
- Search your email logs.
- Access your Emergency Inbox.

Logging In

1. Open a web browser and navigate to the appropriate URL.
2. Enter your login email address and password.

If you do not have a password, contact your company administrator.

If you forgot your password, click the Get a New Password link and an email will be sent to you with further instructions.

Resetting your Password

1. Click on your name in the top right hand side of the screen.
2. Select Profile.
3. Type in your new Password in the Password field.
4. Type in your new Password in the Retype Password field.
5. Click Save.

Navigating the User Interface

Quarantine

The quarantine tab allows you to view your quarantined email. In addition, you can adjust the options to display additional email messages such as all email, email that bas been cleared or blocked.

To view your Quarantine:

1. Click on the Quarantine tab.
   - A default email logs view will be returned.
   - This will show you any inbound quarantined email received yesterday or today.
2. To modify your results, select Type from the drop-down list.
   - *Inbound mail:* Will include emails that were sent to you.
   - *Outbound mail:* Will include emails that were sent by you. (Note: Not currently in use!)
3. Select Received from drop-down list.
   - *Today*
   - *Today and Yesterday*
   - *The Last Week*
   - *The Last 2 Weeks*
   - *The Last 30 Days*

4. Select Status from drop-down list:

- *Any:* Will include all email types.
- *Quarantined:* Will include emails that have been quarantined.
- *Reported (Misclassified):* Will include emails that have been reported as spam by the user.
- *Blocked:* Will include emails that have been blocked by a filter.
- *Cleared:* Will include emails that were received and delivered.
- *Cleared (but Queued for delivery):* Will include emails that have been received but have are queued for delivery.
- *Cleared (but Bounced by destination):* Will include emails that have been received but were bounced by the target destination server.
- *Cleared (Released from quarantine):* Will include emails that have been released from the quarantine.

5. Click Search.

Results are displayed on the screen.

You can include additional options when searching your logs, including:

- *From:* Type in an email address or domain (i.e. domain.com) to only display results that were sent from the address/domain specified.
- *To:* Type in an email address or domain (i.e. domain.com) to only display results that were sent from the address/domain specified.
- *Subject:* Type in the subject line of the email.
- *Categories:* Select Advanced Search (next to the Clear button) to access this control. Check the categories you wish to include in your results.

To view a quarantined email:

1. Click on the View button next to email you wish to view.
   - *Download: Will download a copy of the email to your local desktop.*
   - *Delete: Will remove the email from your view of the quarantine.*
   - *Release: Will release the email so that it is delivered to your mailbox.*
   - *Close: Will close the Email View Preview window.*

   You can only view emails that have been quarantined.

To view more information about a quarantined email

1. Click on the Details button next to email you wish to select.
   - *General Description: Basic information about the email including the sender, subject and time stamp.*
   - *Scan Information: Scan results for both spam and virus analysis.*
   - *Per-Recipient Classification & Delivery Status: Classification of the email and current status.*
   - *Other Information: Sending IP address, country and email size.*
2. Click on the Close button to close the Detailed email log entry window.

To take an action with a selected email:

1. Check the checkbox next to the email you wish to take action on.
2. Select the Actions drop-down list.
3. Choose the action.
   - *Release from Quarantine:* Will release the selected email from the quarantine.
   - *Release and Approve:* Will release the selected email from the quarantine *and* add the email to your Safe Sender List.
   - *Classify as spam:* Will classify the email as spam.
   - *Classify as clean:* Will classify the email as not spam.
   - *Hide email from logs:* Will hide, that is remove, the email from the email logs.
4. Click Apply.

Settings

Profile

Use this page to update your personal information. You can also access this screen by clicking on your name in the header and selecting Profile.

To make changes to your profile:
1. Click on Settings tab.
2. Click on Profile tab.
3. Update your information.
4. Click Save.

Aliases

Use this page to view all the aliases addresses registered to your account. An alias is another email address that is registered to you. For example: jane.smith@seroom.com may also have the alias: [jsmith@seroom.com.](mailto:jsmith@seroom.com) Emails to both addresses will arrive at Jane Smith's inbox.

Spam

Use this page to make changes to your spam settings. Spam settings are used to determine how aggressive Proofpoint Essentials spam engines should be for your account. The default value is 7. Your company administrator may have changed this setting for all users and therefore it is recommended you contact your administrator if you wish to make changes.

To adjust your spam settings:
1. Click on the Account Setup tab.
2. Click on the Spam Settings tab.
3. Click on the slider control on your screen.
4. Drag the control to the left (more aggressive) or right (less aggressive).
5. Click Save.

There are additional options you can set on this page such as:

- *Quarantine bulk email*: This will treat bulk email (i.e., email newsletters, promotional offer from site you have given permission to market to you) as spam and quarantine these emails.
- *Spam stamp & forward*: This will deliver all emails to your inbox regardless of whether they are classified as spam or not. However, the subject line of any email identified as spam will be modified to include the text you enter into the *Spam stamp & forward subject tag:* text box. This text defaults to ****Spam****.
- *Include Easy Spam Reporting disclaimer in passed email*: This will add a footer to all your inbound emails. The footer will include a link for you to report to Proofpoint Essentials that the email is spam.

Digests

This page allows you to change your quarantine digest delivery settings.

- *Enable digests for user:* Use this option to enable/disable digests.
- *Only include messages quarantined since the last Quarantine Digest was sent:* Use this option to only send out digests if new mail has been received.
- *Quarantine Digest delivery start time:* The first time of the day that the digest should be delivered.
- *Interval between digest checks:* Use this option to choose the frequency of digest delivery.
- *Retention period:* Use this option to choose how long mail will remain in the quarantine.
- *Timestamp of last Quarantine Digest Check:* The timestamp of the last digest delivered to you.
- *Include emails that have been quarantined by:* Will add emails quarantined as a result of a filter or blocked sender list to the quarantine digest.
- *Exclude message from the Quarantine Digest that are most likely to be spam:* Will not include any emails in the Quarantine Digest that score as very likely spam

Your company administrator has defined the quarantine digest settings. Any changes made will apply to you only. The administrator can reset these settings back to their defaults as needed.

To adjust your digest settings:
1. Click on the Settings tab.
2. Click on the Digests tab.
3. Update your settings.
4. Click Save.

Groups

This page will display any groups that you belong to.

Sender Lists

Sender lists allows you to define senders (someone@domain.dev) or domains (domain.dev) that you wish to either receive or block email from.

To add an entry to the Safe/Blocked sender list:
1. Click on the Settings tab.
2. Click on the Sender Lists tab.
3. Type in an SMTP address (user@domain.dev) or domain (domain.dev)
   You can add more than 1 entry by separating then with a comma or semi-colon.
4. Click Save

To remove an entry from the Safe/Blocked sender list:
1. Click on the Settings tab.
2. Click on the Sender Lists tab.
3. Highlight the entry you wish remove and hit delete using your keyboard
4. Click Save.

Emergency Inbox

The Emergency Inbox allows users to send and receive email when their company mail systems are offline, either for planned maintenance or an unexpected outage. The Emergency Inbox will automatically begin populating your email when your mail systems stop receiving email. And will clear out once your systems are functioning again. You should contact your company administrator to learn more about when to use the Emergency Inbox.