

## SPAM FILTER



# User Guide

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# Preface

## TERMS TO KNOW

### **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.

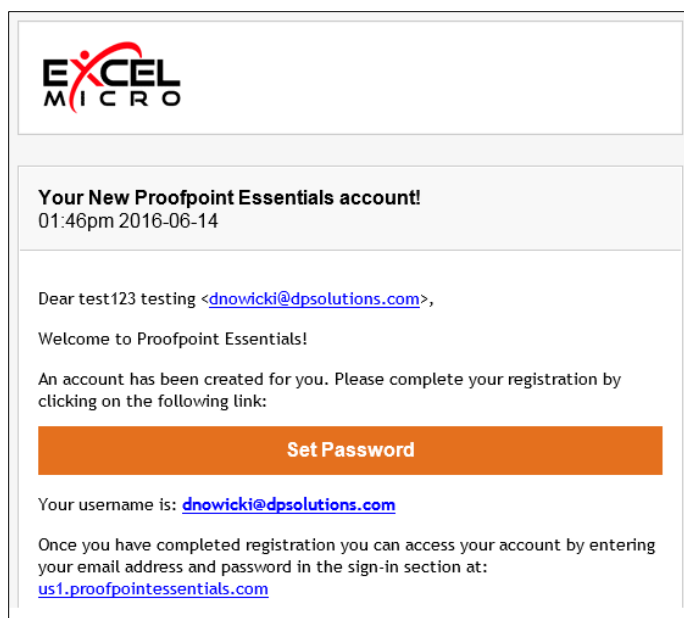


## Getting Started

### WELCOME TO PROOFPOINT ESSENTIALS

Once a Proofpoint account has been created for you, you will receive a Welcome Email that allows you to complete your registration and set your password.

Sample Welcome Email:



## 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.



## 1. Logging In

### OPTION #1: Logging in with an Office 365 Account

*Use this method if you have an Office 365 Account*

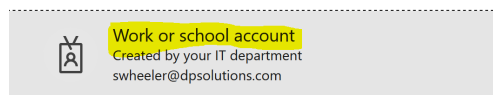
**\*NOTE: If you do not have an O365 email account, see Option #2**

1. Go to your Proofpoint Essentials account login page.  
<https://us1.proofpointessentials.com/>
2. Under “or”, click “*Sign in with Microsoft*”

3. Link will redirect you to a Microsoft account login page. Select “Work or school account”.



It looks like this email is used with more than one account from Microsoft. Which one do you want to use?

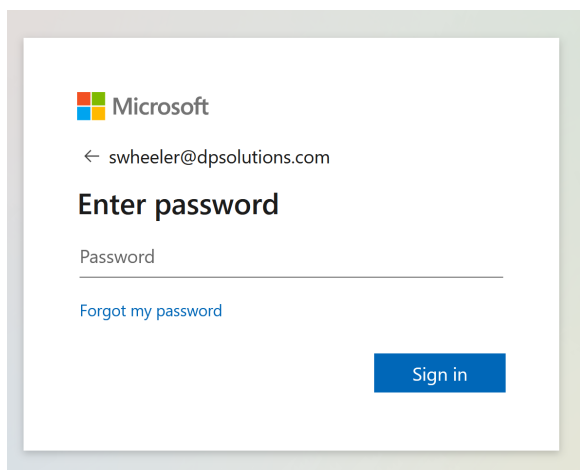


Tired of seeing this? [Rename your personal Microsoft account.](#)

Back



4. Enter your O365 credentials and click “Sign in”.



Note: There may be a Microsoft Authorization request or a 2-step verification to complete sign in depending on your organization’s security configuration.

5. If successful, login will redirect you back to Proofpoint Essentials and you will be automatically signed into your account.

## OPTION #2: Log in to the Proofpoint Dashboard

**\*Use this option if you do not have an O365 email account.**

1. To log in to the Proofpoint Dashboard, open a web browser and navigate to:  
<https://us1.proofpointessentials.com/app/login.php>

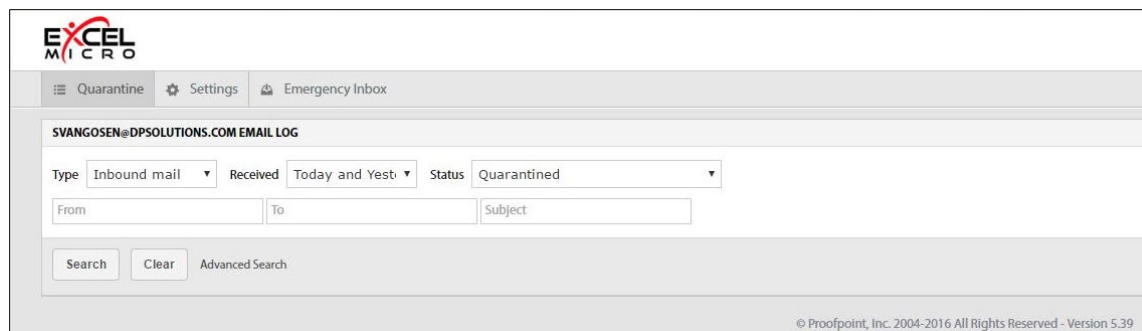
2. Enter your login email address and password.

*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.*

NOTE: When you first log in, you will be taken to the “Quarantine”, as shown below.





## 2. Resetting your Password

*To reset your password:*

1. Click on your name in the top right hand side of the Proofpoint Dashboard.
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**.

## 3. 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 has 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: Will include emails that were sent to you.
  - Outbound: Will include emails that were sent by you.



3. Select **Received** from drop-down list.

- Today and Yesterday
- The Last Week
- The Last 2 Weeks
- The Last 30 Ways

4. Select **Status** from drop-down list:

- *Any*: Will include all email types.
- *Quarantined*: Will include emails that have been quarantined.
- *Reported*: 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 Address or Domain*: Type in an email address or domain (i.e. domain.com) to only display results that were sent from the address/domain specified.
- *To Address or Domain*: 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 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.
  - *Release*: Will release the email so that it is delivered to your mailbox.
  - *Hide from Logs*: Will hide the email from the email logs for 30 days.
3. Click on the **Close** button to close the email view.

*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.
  - *Pre-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 email view.

**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.
  - *Resend (Instant Replay) \**: Will resend the selected message to the user inbox.
  - *Not Spam*: Will classify the email as not spam.
  - *This is Spam*: Will classify the email as spam.
  - *Hide from Logs*: Will hide the email from the email logs for 30 days.
4. Click **Apply**.

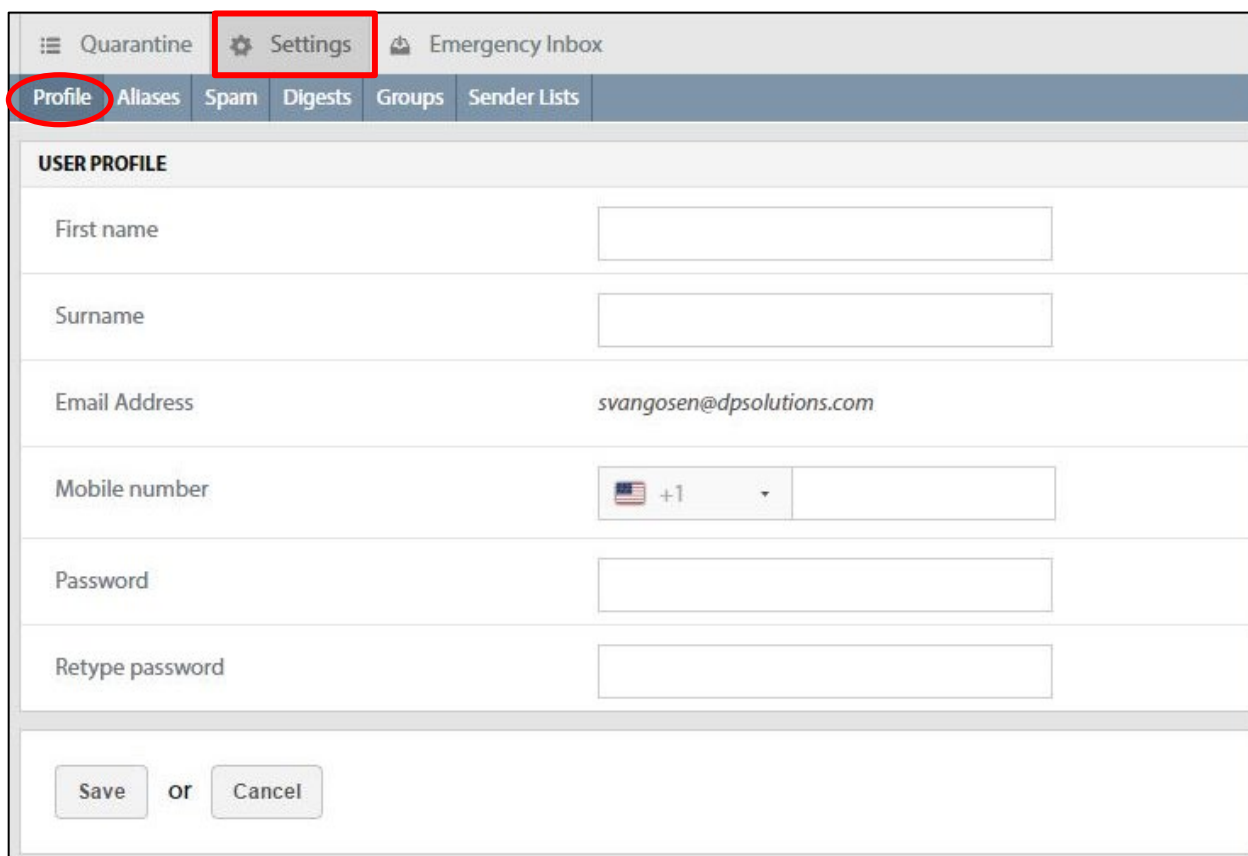




### 3. User Settings

From the main screen, click on the **Settings** tab to adjust your User Preferences.

#### Profile



The screenshot shows the 'Profile' settings page. At the top, there are three tabs: 'Quarantine', 'Settings' (highlighted with a red box), and 'Emergency Inbox'. Below these is a sub-navigation bar with tabs: 'Profile' (highlighted with a red circle), 'Aliases', 'Spam', 'Digests', 'Groups', and 'Sender Lists'. The main content area is titled 'USER PROFILE' and contains the following fields:

- First name:
- Surname:
- Email Address: *svangosen@dpsolutions.com*
- Mobile number:  with a dropdown menu showing a US flag and '+1'
- Password:
- Retype password:

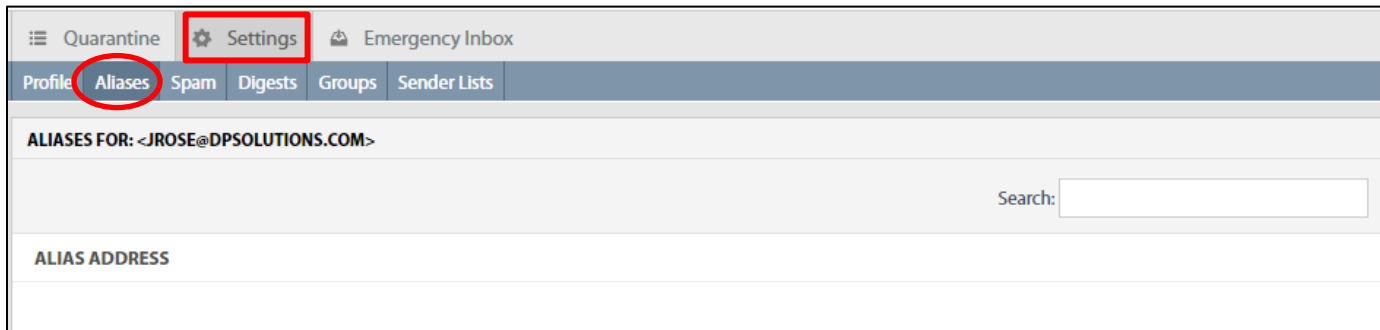
At the bottom of the form, there are two buttons: 'Save' and 'Cancel', separated by the text 'OR'.

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:

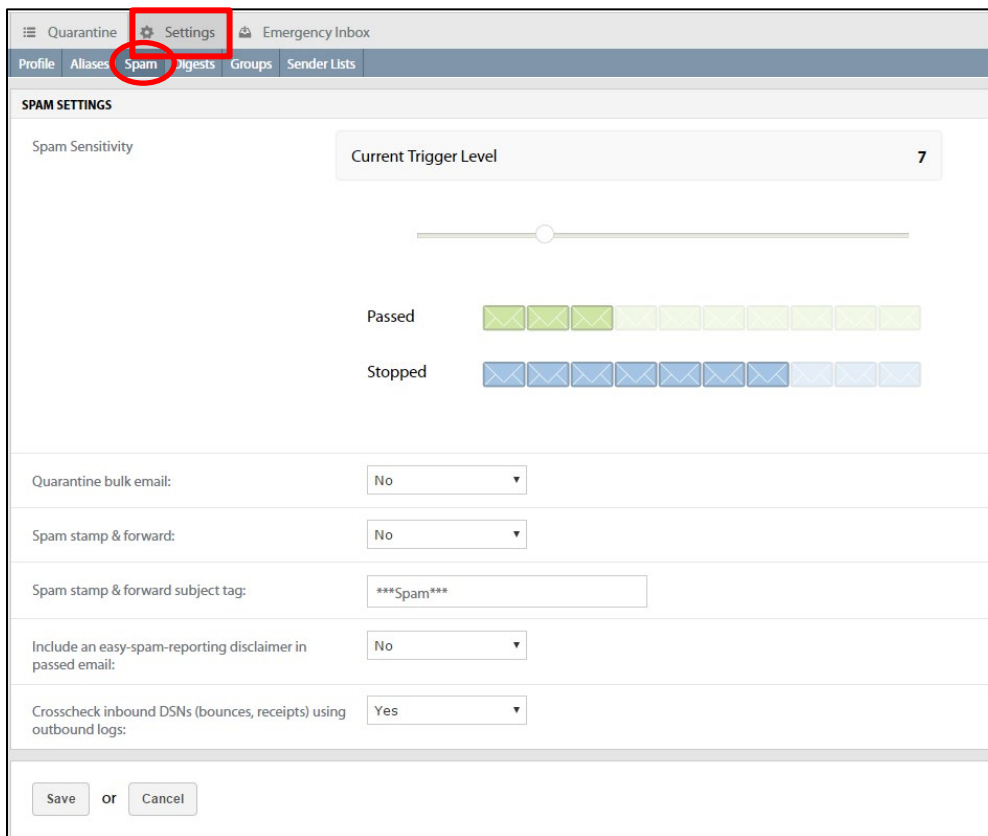
1. Click on **Settings** tab.
2. Click on **Profile** tab.
3. Update your information.
4. Click **Save**.

## 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](mailto: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. The subject line of any email identified as spam will be modified to include **\*\*SPAM\*\***.
- *Include Easy Spam Reporting disclaimer*: 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**.
- *Cross check inbound DSN*: Performs additional email analysis on emails based on outbound delivery logs. We recommend you do not change any of these settings without contacting your administrator beforehand.



## Digests

The screenshot shows the 'Digests' settings page. At the top, there are tabs for 'Quarantine', 'Settings', and 'Emergency Inbox'. Below these are sub-tabs for 'Profile', 'Aliases', 'Spam', 'Digests', 'Groups', and 'Sender Lists'. The 'Digests' sub-tab is selected and circled in red. The main content area is titled 'DIGESTS' and contains the following settings:

- Enable digests for user:** Yes (dropdown menu)
- Only include messages quarantined since the last Quarantine Digest was sent:** Yes (dropdown menu)
- Quarantine Digest delivery start time:** 04:00 (dropdown menu)
- Interval between digest checks:** 24 h (dropdown menu)
- Retention period:** 30 days (dropdown menu)
- Timestamp of last Quarantine Digest check:** 04:00:01 EDT, Wednesday 21 September 2016
- Include emails that have been quarantined by:**
  - Organization filters and/or blocked sender list entries
  - Group filters and/or blocked sender list entries
  - End-user filters and/or blocked sender list entries
- Exclude messages from the Quarantine Digest that are most likely to be spam:**
- Send Quarantine Digest:** Send Digest (button)

At the bottom of the form, there are 'Save' and 'Cancel' buttons separated by the word 'or'.

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.



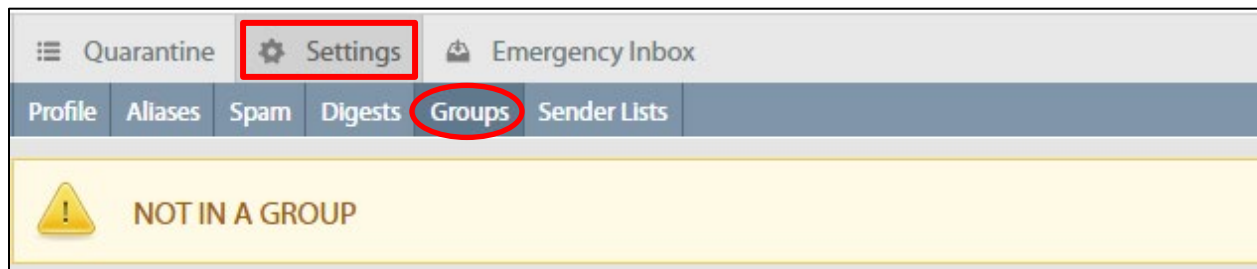
- *Timestamp of last Quarantine Digest Check:* The timestamp of the last digest delivered to you.
- *Include emails that have been quarantined by:* Will add emails quarantined as a result of a filter or sender list to the quarantine digest.

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

☰ Quarantine
⚙ Settings
📧 Emergency Inbox

Profile
Aliases
Spam
Digests
Groups
Sender Lists

**SENDER LISTS**

**Blocked Sender List**

Messages from addresses, domains or IP addresses that you include on the blocked sender list will be quarantined.

To add addresses, domains (e.g., \*@domain.com, \*@\*.domain.com) or IP addresses to the list, type them in the text box and use a line, comma or semi-colon to separate entries. IP addresses may contain wildcards (e.g., 10.20.\*.20, 10.\*.\*, 10.\*.0.\*) and CIDR notation (e.g., 10.0.62.0/24). Click the save button to save your changes.

Enter your Blocked sender list separated by line, comma or semi-colon...

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**Safe Sender List**

Messages from addresses, domains or IP addresses that you include on the safe sender list will not be quarantined.

To add addresses, domains (e.g., \*@domain.com, \*@\*.domain.com) or IP addresses to the list, type them in the text box and use a line, comma or semi-colon to separate entries. IP addresses may contain wildcards (e.g., 10.20.\*.20, 10.\*.\*, 10.\*.0.\*) and CIDR notation (e.g., 10.0.62.0/24). Click the save button to save your changes.

Save



Sender lists allow 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 one entry by separating the address 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**.

**Disclaimer**

A disclaimer is a block of content that will be added to all your outbound emails. This is only applicable to companies who send outbound email through Proofpoint Essentials. You should contact your company administrator if you wish to use disclaimers.

**To add/edit a disclaimer:**

1. Click on the **Settings** tab.
2. Click on the **Disclaimer** tab.
3. Type in the content you wish to include as your disclaimer.

*The HTML editor allows you to use colors, customize fonts, include images, etc. The Plain Text editor only supports text.*



## 4. 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.

The screenshot shows the Proofpoint Essentials Emergency Inbox interface. The interface is split into two main sections. On the left is the 'USER PROFILE' section, which includes fields for First name, Surname, Email Address, Mobile number, Password, and Retype password. Below these fields are 'Save' and 'Cancel' buttons. Underneath the profile section is 'Account Information' with fields for Activation Date, Last Update, and Last Login. At the bottom of the left section is 'Vital Statistics'. On the right is the 'Emergency Inbox' tool window, which displays a search bar with 'Filter: All' and 'Qr'. Below the search bar is a table with columns for Subject, Sender, Date, and Size. The table is currently empty. At the bottom of the tool window, there are icons for 'Select', 'Threads', and 'Show preview pane', and a status indicator that says 'Mailbox is empty'.





## Additional Features

The following features are available as an add-on for an additional fee. Contact your account representative if you would like to have these features included in your service.

### EMAIL ARCHIVING

If your company is using the Email Archive feature than you have the ability to search your own archived email. This means you can search emails that you have sent or received.

#### To search your archive:

1. Click on the **Archive tab**.
2. Enter the appropriate criteria for your search.
  - Date / From: Select the FROM date of the range you are interested in.
  - Date / To: Select the TO date of the range you are interested in.
  - Date Type: Choose either send date, received date or archived date.
  - Search By: Choose the location of the message area you wish to search; includes: Subject, Body, To, From, CC, BCC, attachment body, and attachment name.
  - Matches: Choose the relationship between the terms defined; includes: Any of these words (OR), All of these words (AND), and None of these words (NOT).
3. Click **Search**.

#### Viewing Search Results

Once you perform a search the system will execute the criteria against your archived data and return search results to the screen. You can further refine search criteria if necessary. There is a 1,000 record limit for search results.



Search results are displayed in a table and detailed information about each message is displayed including:

- Size (Kb)
- Sent date
- Received date
- Archive date
- From
- To
- Subject

**To view a message:**

1. Click on the **View** link next to the message in question.

**To download a message:**

1. Click on the **Download** link next to the message in question.

*Downloaded emails are in EML format.*

When viewing a message, you can perform multiple actions for the message in question. To view the list actions:

1. Click on the Actions drop down.
2. Select desired Option.

**Redeliver**

Provides users with the ability to have an archived email submitted to the Proofpoint Essentials email relay service for redelivery to each of the messages original recipients. The email will show up in the inbox of the original recipients in a matter of moments.

**Forward to**

Provides users with the ability to have an archived email forwarded to a desired email address. The email will show up in the inbox as an attachment from the Proofpoint Essentials Archive system.

**Export**

Provides users with the ability to have an archived email exported in an email format, which can then be managed by a Microsoft Outlook client as desired.



## EMAIL ENCRYPTION

If your company is using the Email Encryption service than your outgoing emails (emails that you send) may be routed to the Proofpoint Essentials encryption service. Depending on your how your company has configured email encryption this action may be triggered automatically or it may require you to add an identifier to email you wish to be encrypted. Both scenarios are explored below.

### 1. Encryption Scenarios

#### Automatic Detection

Your company may choose to scan outgoing email and look for content, such as credit cards numbers, banking information, etc. If an outgoing email is found to contain such content, the email is routed to the Proofpoint Essentials encryption service. There the email is stored and email notifications are sent to the recipients to direct them back to the encryption service where they can read and respond to your email. You will also receive a notification informing you that your email has been selected for encryption. When this happens you do not need to take any action. Your email has been sent and recipients will have a chance to respond. Responses are delivered to your inbox. You can also reply to responses you receive to your inbox. Replies will also be encrypted.

#### Manual Detection

Your company may provide you with instructions on how to manually trigger an email to be encrypted. This works in the same way described previously. In this case you will insert a term, likely in the subject line. Proofpoint Essentials will detect that term and as a result, route it to the encryption service. For example, you could insert the term “[Encrypt]” into your subject line ahead of your normal subject. As a result, the email would be detected and routed to the encryption service and recipients will be sent notifications. You will receive an email notification informing you that your email has been selected for encryption. All replies will be delivered back to your inbox. In addition, the trigger term (i.e., {Encrypt}) is removed from your recipient’s email but is re-inserted back into replies to ensure that if you reply to a response, it too will be encrypted.

