sendio®

Sendio® Email System Protection

User Quick Start Guide

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INTRODUCTION

WELCOME

Congratulations! You are about to enter the world of spam free email where *you* get to decide who you do, or don't, want to communicate with via email. This *User Quick Start Guide* provides details about:

- How to use the web interface
- How to use the daily Queue Summary email
- How to manage your email whitelist

CONVENTIONS IN THIS MANUAL

NOTE: A Note is information that deserves special consideration.

TROUBLESHOOTING TIP: A Troubleshooting Tip provides information that has been known to help solve various problems.

Data that is typed into a field in the web inteface is identified `using this Courier font`.

Menu Commands

The Sendio web interface has menu commands that you follow to change display pages, open dialog boxes and initiate certain actions. Primary menu commands (or paths through the interface) are shown in **bold** type in the format **User > Messages > Inbound Messages.** This example would mean:

- the User menu

- the Messages button

- the Inbound Messages tabbed page

The options on drop-down menus, such as *Accept Contacts only*, are shown in *italics*.

Sendio Terminology

Words that have special meaning within the context of Sendio operations are shown in *italics*, such as *Accept-List*, *Established* or *Waiting*.

HOW DOES SENDIO WORK?

While Sendio performs many steps to eliminate the obvious unwanted email, the final step is key and where you get involved. In this step Sendio is asking one very simple question - **do you want to receive email from the sender of the email?** In this step, the sender's email address is compared to your personal whitelist, as well as the system whitelist that your IT department may choose to populate. If the sender's email address is matched to a contact then the contact's "action" will dictate whether messages from that sender are Dropped, Held or Delivered.

> **N**OTE: A contact in the system whitelist can be configured by your IT department to take priority over your personal list. In such a case, if there is a match in both lists, the action specified in the system-list will apply.

If Sendio does not find a match for the sender's email address it will hold the message in your personal *Inbound Message Queue* and send a *Sender Address Verification* (SAV) email to the original sender. The purpose of this step is to ensure the sender is a real person and not a machine that is generating spam. When the sender replies to the SAV (by simply clicking REPLY and SEND) the reply is received by Sendio and two important things occur:

- The original message is immediately delivered to your inbox
- The sender's email address is automatically added to your personal whitelist, ensuring that all future messages are immediately delivered.

> **N**OTE: You can manually add individual entries to your personal whitelist. You can also import contacts from your email program (i.e. Microsoft Outlook) to specify a list of "trusted" senders that need not be verified.

SECTION 1: LOGGING IN TO THE WEB INTERFACE

Your network administrator has created an account for you on Sendio. Using your web browser browse to the URL address that was provided to you by your IT department.
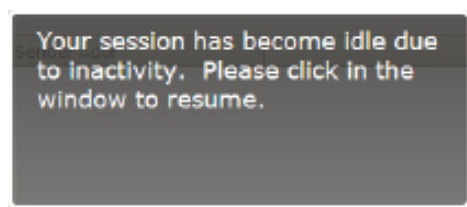
EXAMPLE	http://esp.acmecorp.com

To log in, enter your email address and password. It is very likely that your password will be the same one you use to access your computer but please confirm this with your IT department. If your administrator enabled the "Remember Me" feature, you will see an additional checkbox as shown Choosing this option will cause the system to remember your login information for a short period of time. During this time, you will not be prompted for your email and password when accessing the system.

Sendio will suspend your web browser session after a certain duration of inactivity (the default is 15 minutes). A message will be displayed to indicate this has occured. Simply click anywhere inside the browser window to resume your Sendio session.

Sendio Default Login Window

TROUBLESHOOTING TIP: In the event that the login fails, ensure that the Caps Lock is not turned on or that you have not changed your email password since the last login.

Sendio Login Window with 'Remember Me'

TROUBLESHOOTING TIP: Sendio does not store your password. If you are unable to login to the Sendio web interface please contact your IT department for assistance.

Session Inactivity message

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SECTION 2: WEB INTERFACE FUNCTIONALITY

OVERVIEW

The main function of the Sendio web interface is to provide access to your inbound and outbound message queues as well as allowing you to manage your personal whitelist. This whitelistlist determines which senders you do, or don't, want to receive email from.

The **User** Menu has three navigation buttons that allow you to access distinct sections of the Sendio web interface:

The [Messages] menu button provides access to your inbound and outbound message queues.

The [Contacts] menu option allows you to view and manage your personal whitelist. If enabled by the administrator, you can also view the system contacts in a separate tab.

The [Account Info] menu option provides a summary of your Sendio account.

The following sections will describe each of these menu functions in detail.

User Navigation Menu

MESSAGES

Inbound Messages are messages that someone (or some system) has sent to you. **Outbound Messages** are ones that you send to other people.

When you first log in to the Sendio web interface the initial display is your **Messages > Inbound Messages** *Pending Messages, No Bulk*. There is no way to change the default view - it will always be *Pending Messages, No Bulk*.

		Sender Name	Sender Addr	Subject	Date ▲	Size
1		Premier@premier.w	Premier@premier.w	Your Login Created	6/2/09 3:46 PM	4 KB
2		Premier@premier.w	Premier@premier.w	Your Login Created	6/2/09 3:46 PM	4 KB
3		Symantec Corporati	symantec_corporati	Protection for Small Businesses: F	6/2/09 10:45 AM	43 KB
4		SmartDraw.com	mailinfo@smartdraw	Recession-proofing tip #2: Learn	6/2/09 8:28 AM	23 KB
5		Ascent Group, Inc.	Ascent_Group_Inc@	Prepublication Announcement -- M	6/1/09 9:39 AM	21 KB
6		Parature Inc	Parature_Inc@mail.	The Parature Blog - What to Say t	6/1/09 8:47 AM	9 KB
7		Jessica Younkins	silveriness@btt-gmt	Hometown of Hayes hoolds bearc	5/29/09 4:26 PM	16 KB
8		DataInfoCom Inforn	webmaster@datain	Predictive Management of Inboun	5/29/09 6:24 AM	14 KB
9		Ascent Group, Inc.	Ascent_Group_Inc@	Announcing -- Improving Frontline	5/28/09 11:52 AM	14 KB
10		John Quincy, editor	jquincy@presentati	PresentationXpert Newsletter - M	5/28/09 11:18 AM	39 KB
11		SmartDraw.com	mailinfo@smartdraw	Recession-proofing tip #1: Cut pa	5/28/09 11:14 AM	22 KB
12		Explore Consulting	newsletter@explore	Explore Consulting May 2009 New	5/28/09 9:19 AM	96 KB

Messages > Inbound Messages *Pending Queue*

NOTE: Your Administrator may have disabled the **Outbound Messages** tab shown above.

MESSAGES CONTROLS

At the top of the **Inbound Message** page, there are three buttons: [Refresh] , [View...] , and [Actions...] .

REFRESH BUTTON

While a view will automatically update at a regular interval, the [Refresh] button allows the **User** to initiate the refresh process at any time. The web interface will reload all queued messages in the display.

VIEW BUTTON

The [View...] button has several options that make the *Message Queue* easier to manage. To change the view, you select one of the options from the drop-down menu. Please visit our FAQ at http://www.sendio.com/faq for more details on the different views or colored buttons displayed.

ACTIONS... BUTTON

If there is a message in your *Pending Queue* that you would like to continue to receive, select the message and click the [Actions...] button. There are four options in this menu that result in a specific action on the message or messages selected. The 2 most important are:

Accept Messages

If you wish to receive the selected message, choose this option and the message will be delivered to your inbox. ***This option will not add the sender to your whitelist.***

Add Message Senders to Accept List

If you wish to receive the selected message and all future messages from the same sender, choose this option, and the message will be delivered to your inbox and **the sender will be added to your whitelist.** All future messages from this sender will be delivered to your inbox immediately upon arrival.

> **N**OTE: Holding the Shift key and clicking lets you select a range of messages in your queue. Holding the Ctrl key lets you select individual messages.

Drop Messages

Selecting *Drop Messages* removes the selected message from the *Pending Queue*.
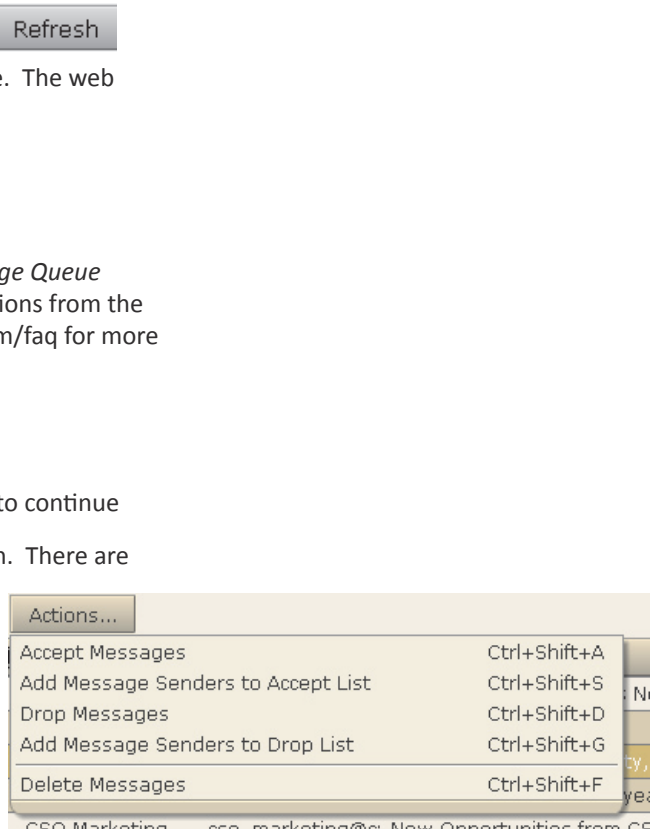
Messages > Inbound Messages > Actions... Drop-Down Menu

Message Release Dialog

Add Message Senders to Drop List

If your Administrator has enabled this function, this Action causes all selected messages to become *Dropped Message*s and adds the message sender's email address to your whitelist as a *Drop Contact.*

> **N**OTE: Do not add *Drop Contacts* to your whitelist unless you are receiving unwanted email from the same sender repeatedly. Drop Contacts are generally unnecessary.

Delete Messages

The *Delete Messages* menu option immediately deletes the selected message(s) from your *Message Queue*. Deleted messages are not recoverable.

MESSAGES > OUTBOUND MESSAGES

> **N**OTE: Your Administrator may have disabled the **Outbound Messages** tab shown in Figure [32].

The **Outbound Messages** queues record all messages that you send outside your organization. [32]

CONTACTS

The [Contacts] button is the second item on the **User** navigation menu.

Selecting this button displays a view of the **Contacts > Account Contacts** page, shown in Figure [34]. This view displays your Sendio whitelist. These addresses represent individuals or organizations whose emails are to be either *accepted*, *held* or *dropped* if they are received by Sendio.

> **N**OTE: **Contacts** pages are sorted by the date that the contact was added to the system. The data may be re sorted by clicking on any of the column headings at the top of the table.

On the left side of the page is a column with a square two-color icon in the header:

. Each record in the table has either a green, a red or a white/gray icon in this column.

A green icon indicates that the address of this "sender" is on your *Accept-List* and that messages from this sender are to be immediately delivered to the your inbox.

A red icon indicates that the address of this "sender" is on your *Drop-List* and that messages from this sender are to be immediately discarded and not delivered.

A white/gray icon indicates that the address of this "sender" is on a *Hold-List* and that messages from this sender are to be held in a user's *Pending Queue*, and either manually released to the inbox or simply allowed to "age out" of the queue.

CREATING A NEW CONTACT

To enter a new contact, click the [New] button.   A pop-up window will appear. Enter the name and email address of the contact in the appropriate fields. A wildcard (*) may be used at any point in the email address.

> **N**OTE: The *Name* field is for display purposes only.

IP Field

Simply enter * in this field unless otherwise instructed by your IT department.

Action Field

The *Action* field has three options on a drop-down menu.

- *Accept* means you want every message from this sender

- *Drop* means you want no messages from this sender

- *Hold* means you will review every message from this sender and decide which ones to release
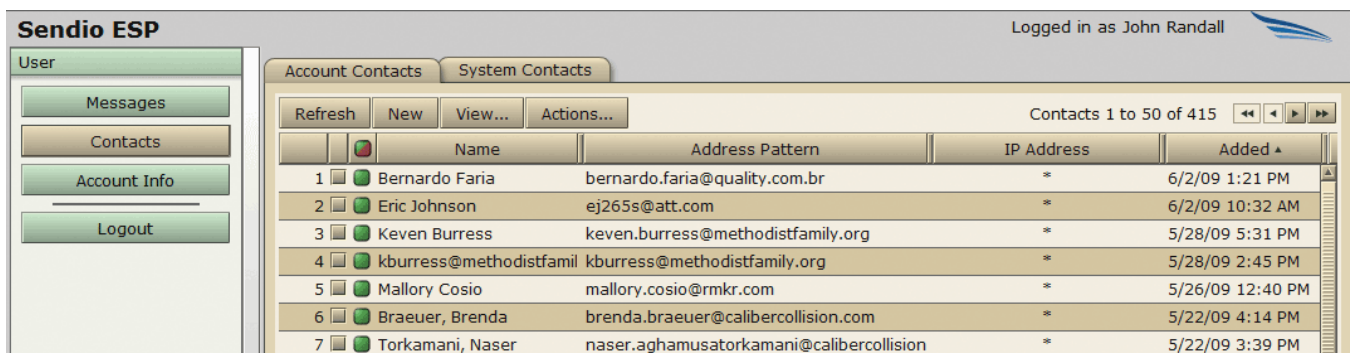
> **N**OTE: *Drop-List* contacts should be created *only* in cases where messages are repeatedly delivered to your inbox from the same sender.
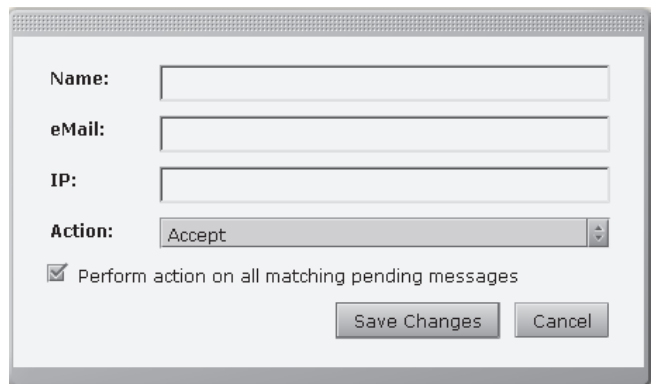
New Contact Pop-up Window
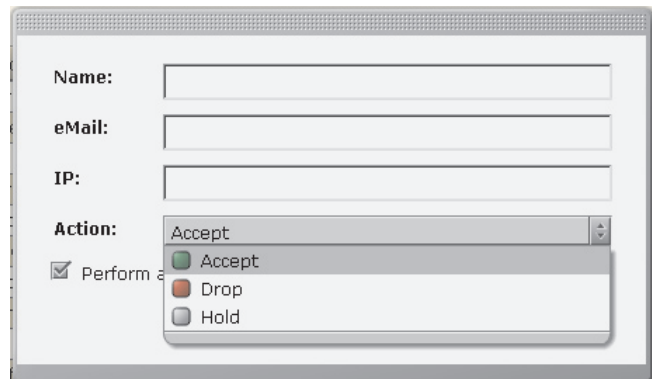
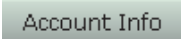*New Contact Action Drop-Down Menu*

Contacts > Account Contacts Page

CHANGING CONTACT INFORMATION

To change any of the information in an existing contact, select the record and click **Actions... >** *Edit Selected Contact*, or double-click the contact entry in the *Contact List*. The pop-up window will be displayed. Modify the contact information and save the changes.

IMPORT CONTACTS

The *Import Contacts* action opens a window which walks you through the process of importing a set of contacts from an external source. Please review the full *Sendio User Guide* for details on importing existing contacts.

ACCOUNT INFO

The [Account Info] button is the third item on the **User** navigation menu.

ACCOUNT INFO > DETAILS

The **Account Info > Details** page is the default display, showing a summary of your account information. It contains a summary of account information and access to Local and Directory passwords.

ACCOUNT INFO > ADDRESSES

The **Account Info > Addresses** page displays all email addresses that are associated with your account. If you have other email addresses that are associated with your account, but not listed here, please contact your IT department for assistance.

SECTION 2: WEB INTERFACE FUNCTIONALITY
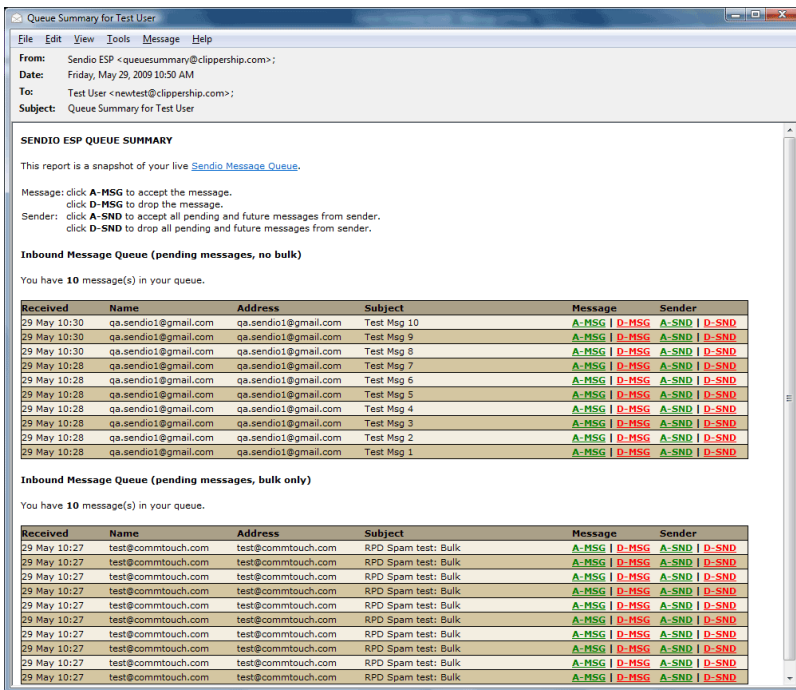
SECTION 3: QUEUE SUMMARY

If your IT administrator has enabled the *Queue Summary* feature, an email that shows the most recent 50 records in your *Pending Queue* will be sent to you on a daily basis. This email is a brief and concise means of viewing information on any recent messages in your *Pending Queue*.

If enabled, by an IT administrator, four "actions" are available from this email, by clicking on a link:

- ▪ a message can be released [**A-MSG**]

- ▪ a message can be dropped [**D-MSG**]

- ▪ a message can be released and the sender address can be added to the your *Accept-List* [**A-SND**]

- ▪ a message can be dropped and the sender address can be added to the your*Drop-List* [**D-SND**]

These functions are provided as a convenience and 100% identical to the functions on the Sendio web interface.

Typical Queue Summary Message

Queue Summary Message Addition When "Show Alternate" Parameter is Enabled

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