Spam Manager User Guide

Boundary Defense™ for Email Anti-Spam End User Guide
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Overview

This Boundary Defense™ for Email Service Guide is for users of the Spam Manager User Interface. The guide describes how to view and manage email messages identified as spam and set your notification options.

1 About the Guide

1.1 Audience and Scope

This guide is for users of Spam Manager. It describes how to view and manage email messages identified as spam, and set your notification options. If you have been enabled to manage your personal approved and blocked senders lists, procedures are given here to guide you in the use of these lists.

Important: The deployment of Spam Manager can vary significantly depending on the security policy and other requirements of your organization. As a result, screen shots in this guide may differ from what you can actually see on your screen. If you have any remaining questions after reading this guide, your organization’s helpdesk should be of help.
2 Introduction to Spam Manager

Spam is unwanted email, often promoting fraudulent or illegal activities, sent indiscriminately to many addresses.

The Anti-Spam service checks all email messages entering your organization. Messages that are suspected of being spam are directed to Spam Manager and do not reach your email inbox. Spam Manager stores your spam. You can log in to Spam Manager and view the details of any spam that has been sent to you. Depending on your organization's security policy, you may be able read the text content of the email.

You can then either:
- Delete unwanted email
- Release wanted email to your normal email inbox

Messages are normally kept in Spam Manager for 14 days unless you choose to delete them before then. After this time they are deleted automatically.

You use a password to log in to Spam Manager. This ensures that only you and your Quarantine Administrators can view your email. Other users cannot access your Spam Manager account.

Depending on how your Quarantine Administrator has set up Spam Manager, you may receive regular notification of email redirected to Spam Manager (see Section 5.2, Setting notification options).

If you receive email within your organization at more than one email address, you can add these to your main Spam Manager account as aliases (see Section 5.3, Managing aliases). All your spam is then redirected to a single Spam Manager account.

Depending on your organization's Email Services configuration, you may be able to define a personal approved senders and/or blocked senders list. The approved senders list is a list of senders that are on either a public or company block list, but that you want to receive mails from. The blocked senders list is a list of senders that are not on a public or company block list, but that you want to block emails from. See Section 6, Managing your approved and blocked senders lists.
3 Getting Started

There are two methods of accessing Spam Manager for the first time. Your organization’s Spam Manager Quarantine Administrator will create an account for you and either:

- Send you a welcome message that contains the URL and a password for you to log in to Spam Manager. (In this case, your Quarantine Administrator has registered for you.)
- Send you a welcome message only when spam is first received for you. This message contains the URL for you to register with Spam Manager. When you click the URL in your welcome message, the Spam Manager registration page is displayed with your email address already entered. Click Send me a password. A confirmation message is sent to you, which contains your initial password and a link to the login page.

Once you are registered, you will receive notification of any spam redirected to Spam Manager (unless the notification facility has been disabled by your Quarantine Administrator).

3.1 Logging In

If you have a URL and password for Spam Manager (either because these were contained in your welcome message or because you have registered as described above), you can log in.

To log in to Spam Manager:

1. Click the URL in your welcome message.
   - The Spam Manager login page is displayed:

   ![Spam Manager Login Page]

2. Enter your email address and password.
3. Click the Login button.

**Note:** Depending on your organization’s security policy, you may be prompted to change your password on logging in. Even if you are not prompted to change your password, it is recommended that you do at the earliest opportunity—see section 5.1.
The Spam Manager **Summary** page is displayed:

![Spam Manager Summary](image)

Up to four tabs are displayed:

- **Summary**—lists all spam redirected away from your inbox to your Spam Manager account

- **Approved Senders**—displays your personal approved senders list (see Section 6, Managing your approved and blocked senders lists)
  
  **Important:** Depending on your organization’s Email Services configuration, you may not be able to manage your own approved senders list. In this case, you will not see the **Approved Senders** tab in Spam Manager.

- **Blocked Senders**—displays your personal blocked senders list (see Section 6, Managing your approved and blocked senders lists)
  
  **Important:** Depending on your organization’s Email Services configuration, you may not be able to manage your own blocked senders list. In this case, you will not see the **Blocked Senders** tab in Spam Manager.

- **Options**—enables you to change the frequency of email notifications, add aliases, and change your password.
3.2 Changing the Language of the Display

You can change the language of the Spam Manager display and of the notifications that you receive when a spam email is received in your account.

To change the language of the display:

- Select the language you require from the drop-down list at the top-right of the Spam Manager screen. Spam Manager will use the selected language when you log in again.

Note: The language can be changed at any time, as necessary.
4 Managing Your Messages

4.1 Viewing Messages

Once you have logged in to Spam Manager, any spam email that you have is listed. Details of the sender and date are shown for each message. Depending on your organization’s security policy, the subject of the message may be shown also.

Note: If your Spam Manager account contains spam from more than one email address; that is, if you have set up an alias, the address to which each message was sent is shown in a Recipient column. (For more information about alias accounts, see Section 5.3, Managing aliases.)

To sort the list:
1. Click the Summary tab.
2. Click the heading of the column to sort by.
   - An arrow is displayed in the column heading to indicate the direction of the sort.

To define the number of entries displayed on a page:
1. Click the Summary tab.
2. Click the arrow next to the Messages per page
4.2 Searching for a Message

You can search Spam Manager for a message from a specific sender or with a specific subject.

To search for a message:

1. Click the Summary tab.

2. Type a keyword (or part of one) to identify the subject line or sender of the email in the search box. You cannot use wildcards in the search field. For example, if you search for *, you will only find emails that contain the symbol in the subject line or sender’s name.

3. Click the Search button.
   - Any messages containing the keyword are displayed.

To list all messages:

1. Click the Summary tab.

2. Click the Clear Search button. All of your messages are listed according to your setting for the number of messages per page (see Section 4.1, Viewing messages).

4.3 Selecting Messages

When you want to delete or release your messages, you can select them either individually or one page at a time.

To select an individual message:

1. Click the Summary tab.

2. Locate the message and select the checkbox to the left of it.
To select messages a page at a time:

1. Click the **Summary** tab.

2. Select the checkbox at the top of the list, to the left of the **Sender** column.
   - All of the messages on the page are selected.

To view the content of a message:

Depending on your organization’s security policy, you may be able to view the text content of the emails displayed in Spam Manager. To do this:

1. Click the **Summary** tab.

2. Locate the message to view and click on its sender’s name.
   - The message is displayed.

You can check the content of the message and decide whether to release it, delete it, or neither.

**Important:** If your organization’s security policy prevents you from viewing the subject or content of email messages in Spam Manager, the only way to be able to read those messages is by releasing them to your email inbox. You are advised to exercise caution when considering releasing messages with potentially inappropriate content, as once you have released them and received them in your inbox, they become your responsibility.
4.4 Releasing Messages

When you release a message, it is sent to your email inbox. It remains visible in Spam Manager and can be identified by the small arrow icon next to the subject. Messages can be released individually or a page at a time.

Note: If you are the owner of an account with aliases or an account group and release an email for one of your aliases or member accounts, the email is released to the original recipient’s inbox rather than to your inbox.

To release a message:

1. Click the Summary tab.

2. Either:
   - Select the checkbox to the left of the email to release and click the Release button at the top or bottom of the list.
   - Open the email to release by clicking the sender detail, and click the Release button at the top or bottom of the message.

A Message released confirmation message is displayed. You may be able to request that the sender is added to your organization’s or your own approved senders list (see Section 5.4, Requesting a sender to be approved and 6, Managing your approved and blocked senders lists).
To release multiple messages:

1. Click the Summary tab.

2. Select the checkboxes to the left of the emails to release and click the Release button at the top or bottom of the list.
   - A Message released confirmation message for the first selected message is displayed.

3. Click the Continue button.
   - The next Message released confirmation message is displayed. Continue in this way until all of the messages are released.

   **Note:** At each Message released confirmation message, you may be able to request that the sender is added to your organization’s or your own approved senders list (see Sections 5.4, Requesting a sender to be approved and 6, Managing your approved and blocked senders lists).

4.5 Deleting Messages

When you delete a message, it is removed from Spam Manager. Selected messages can be deleted individually, a page at a time, or all at once.

To delete a message:

1. Click the Summary tab.

2. Either:
   - Select the checkbox to the left of the email to delete and click the Delete button at the top or bottom of the list.
   - Open the email to delete by clicking the sender detail, and click the Delete button at the top or bottom of the message.
To delete a page of messages:

1. Click the Summary tab.

2. Select the checkbox to the left of the sender heading.
   - All of the messages on the page are selected.

3. Click the Delete button at the top or bottom of the list.

To delete all messages:

1. Click the Summary tab.

2. Click the Delete All button at the top or bottom.
5 Managing Your Account

The following tasks enable you to use your Spam Manager account as you require:

- **Changing your password**—you should change your password regularly. Depending on your organization’s Security policy, this may be enforced by the Spam Manager system. See Section 5.1, Changing your password.

- **Setting notification options**—specify how often you would like to receive notifications that you have spam. See Section 5.2, Setting notification options.

- **Managing aliases**—if you have several email addresses within the organization, you can assign them to be managed by your main Spam Manager account. See Section 5.3, Managing aliases.
  
  **Note:** Your Spam Manager Quarantine Administrator may have set up your email accounts as aliases for you. If so, you may receive a notification email advising you of this and requesting your confirmation.

- **Requesting a sender to be approved**—you can request that a sender is added to your organization’s approved senders list, so that emails from those senders are not identified as spam. See Section 5.4, Requesting a sender to be approved.
  
  **Note:** You may be able to manage your own personal approved and blocked senders lists, in which case you can add a sender to your own approved senders list. See Section 6, Managing your approved and blocked senders lists.

5.1 Changing Your Password

For security reasons you should change your password regularly. Depending on your organization’s Security policy, this may be enforced by the Spam Manager system.

**To change your password:**

1. Click the **Options** tab.
2. Click the **Change Password** link.

3. Enter your **Old Password**.
4. Enter your **New Password**.
5. Confirm your new password by entering it again in the **Repeat New Password** box.
6. Click the **Change** button.
7. Confirmation of the change is displayed.
**5.2 Setting Notification Options**

If the notification facility has been enabled by your organization, you will receive periodic email notification of any spam held by Spam Manager. Each notification email lists only those messages received by Spam Manager since the previous notification.

Depending on how Spam Manager has been set up by your Quarantine Administrator, you may be able to change the frequency with which you receive notifications. If the **Notifications** link is shown on the **Options** page, you can change the frequency of these messages.

**Note:** To trigger the sending of notifications, you may need to register and request a password (see **Section 3, Getting Started**).

**To change the frequency of notifications:**

1. Click the **Options** tab.
2. Click the **Notifications** link.
3. Ensure that the **Send notifications of newly received spam messages** checkbox is selected.
4. Select a frequency for notifications to be sent from the **Send notifications when?** drop-down list.
5. Click the **Save** button.
5.3 Managing Aliases

If you have several email addresses within your organization (for example, john.smith@janesbagels.com and jsmith@janesbagels.com), you can combine these as aliases under a single Spam Manager account. In this way you will only need one set of login details (email address and password) for Spam Manager and all your spam will be displayed together.

**Note:** You can only use email addresses that have been registered by your organization as aliases.

**Note:** If you have set up aliases for your account, the Summary page in Spam Manager displays both the sender and the recipient of your spam messages.

To add an alias:

1. Login to the Spam Manager account to which you would like to add an alias.
2. Click the Options tab.
3. Click the Manage Aliases link.
4. In the Add an alias box, enter the additional email address to be managed by this account.
5. Click the Add button.
6. A confirmation message is displayed. A message is sent to your other email address, requesting confirmation that this email address should become an alias. Click the URL in the message to confirm the creation of the alias. Until you have done this, the alias is shown as ‘pending’ in Spam Manager.
To delete an alias:

1. Login to the Spam Manager account to which you would like to delete an alias.
2. Click the Options tab.
3. Click the Manage Aliases link.
4. Select the checkbox to the left of the alias to delete.
5. Click the Delete button.
6. After an alias has been deleted, any spam received for that email address will no longer be directed to the alias' owner, but will instead be directed to a new Spam Manager account for that email address. If Spam Manager has been configured to send welcome messages, when spam is received, a message inviting the user to register with Spam Manager is sent to the previously aliased email address. The user will then be able to request a password and manage their own Spam Manager account.

5.4 Requesting a Sender to be Approved

If email from a particular sender is regularly identified as spam, you can request that the sender is added to your organization’s approved senders list. Email from senders on the approved senders list bypasses the Anti-Spam scanners.

Note: Your Email Services Administrator may have decided not to offer you the facility to request that a sender is added to the approved list. Alternatively, your Email Services Administrator may have enabled you to manage your own personal approved and blocked senders lists. In this case, you will be able to add a sender to your list yourself. For full details, see Section 6, Managing your approved and blocked senders lists.

To request a sender to be approved:

1. Click the Summary tab.
2. Select a message from the sender of interest and click the Release button.
3. In the Message released confirmation, click the Request sender approved button.

An email requesting the sender to be added to your organization’s approved senders list is sent to your Email Services Administrator. The sender is added at the discretion of the Administrator.
5.5 Account Groups

Your Spam Manager Quarantine Administrator can assign spam for individual Spam Manager accounts to be sent to the owner of an ‘account group’. An account group enables spam for several email addresses to be viewable through one Spam Manager account. The settings for the individual accounts still apply to those individuals’ email and the users in the group can still view and manage their spam themselves.

If you have been set up as an owner of an account group, you may receive a notification email advising you of this and requesting your confirmation. The users of the individual email addresses in an account group can still manage their own spam and account settings.

If your spam is managed by someone else as part of an account group, you may receive a notification email advising you of this and requesting your confirmation. You can still view and access your own Spam Manager account and manage your spam and account settings yourself.
6 Managing Your Approved and Blocked Senders Lists

**Note:** Depending on your organization’s Email Services configuration, you may not be able to manage your own approved and blocked senders lists. In this case, you will not see the Approved Senders and Blocked Senders tabs in Spam Manager.

Depending on your organization’s Email Services configuration, you may be able to define personal approved and blocked senders lists so that, for example, you can receive emails from an address on the company blocked senders list.

- An approved senders list is a list of domain names or email addresses that you want to receive email from, even though these senders may otherwise be blocked by public or company block lists or other spam detection methods.

- A blocked senders list is a list of domain names or email addresses that you want to block emails from, if such mail does not typically get intercepted as spam by the Anti-Spam service scanners.

Your organization may have company approved and blocked senders lists set up. If you are able to manage your own lists, the Email Services Administrator will have specified whether the company lists override your personal lists or vice versa. If you have any concerns about unwanted email getting through to you or wanted email not getting through to you, contact your Email Services Administrator.

Entries on the approved and blocked senders lists can be either full email addresses or domains, for example, jsmith@janesbagels.com or janesbagels.com.

The maximum number of entries in your personal approved and blocked senders lists is 150 in each.

**Important:** You should not put your domain name in your own approved senders list—this could cause problems with spam from spoofed email addresses not being quarantined as expected.
6.1 Viewing Your Approved and Blocked Senders

To view your approved and blocked senders:

- Click the Approved Senders or Blocked Senders tab, as required.
  - The existing entries on your list are displayed, including the sender or domain name, whether the entry is a full email address or a domain, the entry description, and the date the entry was added.

You can sort the list by clicking on the column heading and change the number of items displayed on a single page by using the Entries per page drop-down list.

You can locate an entry by:

- Searching for a specific sender.

  **Note:** You can use partial matching—you do not have to enter the complete email address or domain. You cannot use wildcards in this search field. Entering a * will only find emails that contain the * symbol itself in the sender field.

- Searching for senders added to the approved or blocked senders list between two dates.

- Scrolling through the pages of the list.

To view all entries again after a search:

- In the Approved Senders or Blocked Senders tab (as required), click the Clear Search button.
6.2 Adding an Approved or Blocked Sender

Entries on your personal approved and blocked senders lists can be added in a number of ways:

- You can add entries to your approved and blocked senders lists manually in the Approved Senders and Blocked Senders tabs.
- When you release a spam message to your inbox, you can approve the sender of the spam message at that time. You can also approve the sender’s domain, so that any emails sent from the domain will bypass the Anti-Spam service.
- Your Spam Manager Quarantine Administrator can add, edit, and delete entries on your behalf.

**To add an approved or blocked sender:**

1. Click the Approved Senders or Blocked Senders tab, as required.
2. Click the Add Entry button.
   - The Add … Sender page is displayed.
3. Enter the email address or domain name of the sender to add to the list.
   - An email address must be the full address with a valid domain name, such as broberts@janesbagels.com. Partial email addresses, such as broberts@janesbagels, are not valid.
   - A domain name can be a full name, such as janesbagels.com, or a top-level domain, such as .com or .us. Subdomains, such as name.janesbagels.com, are also valid. Partial domains without the top-level domain, for example, webcam, is not valid. The * wildcard is also not valid within a domain name.
4. Enter a description for the entry (this is mandatory).
5. Click Save.
   - The new entry is displayed in the list.
To add an approved sender when you release a message from Spam Manager:

1. When you receive a message identified as spam from a sender that you wish to add to your personal approved senders list, select the message, and click the **Release** button.
2. In the **Message released** confirmation, click the **Approve sender** or **Approve domain** button, as required.

3. The **Add Entry** page is displayed with the **Sender** box already filled in.
4. Enter a description for the entry (mandatory).
5. Click **Save**.
6. The new entry is displayed in the list.

### 6.3 Editing an Approved or Blocked Sender

To edit an approved or blocked sender:

1. Click the **Approved Senders** or **Blocked Senders** tab, as appropriate.
2. Locate the entry of interest and click on the sender name. The **Edit Entry** page is displayed.

3. Edit the email address or domain name, if required.
   - An email address must be the full address with a valid domain name, such as *broberts@janesbagels.com*. Partial email addresses, such as *broberts@janesbagels*, are not valid. A domain name can be a full name, such as *janesbagels.com*, or a top-level domain, such as *.com* or *.us*. Subdomains, such as *name.janesbagels.com*, are also valid. Partial domains without the top-level domain, for example, *webcam*, is not valid. The * wildcard is also not valid within a domain name.
4. Edit the description for the entry (this is mandatory).
5. Click **Save**.
6.4 Deleting Approved or Blocked Senders

| Note: You are not asked to confirm deletion when deleting entries from the approved and blocked senders lists. |

To delete selected approved or blocked senders:

1. Click the Approved Senders or Blocked Senders tab, as appropriate.
2. Locate the entries of interest and select the checkboxes to the left of the entries.
3. Click the Delete button.

To delete all approved or blocked senders:

1. Click the Approved Senders or Blocked Senders tab, as appropriate.
2. Select the checkbox in the heading of the left column.
   - All entries are selected.
3. Click the Delete button.
7 Troubleshooting

7.1 I Have Not Received an Email Asking Me to Register and Log In

If you have not yet received any registration or login details, there are two likely reasons:

- You have not received any spam.
- Instead of creating an individual Spam Manager account for you, your Quarantine Administrator has decided to manage your spam in a different way.

However, if you would like to check whether an account has been created for you:

1. Go to the login page.
2. Click the Need a Password? link.
3. Enter your email address.
4. Click Send Password.

- If you receive the error message ‘Invalid email address’, you do not have a Spam Manager account. If you think you should have a Spam Manager account, contact your Quarantine Administrator.

- If you receive a password (sent to your email inbox), you can log in to Spam Manager. If no spam has been redirected to Spam Manager, the message ‘You currently have no spam in the quarantine system’ is displayed.

7.2 The System is Refusing to Send Me a Password

If you receive the error message ‘Invalid email address’ when requesting a password, a Spam Manager account has not been created for you. There are two likely reasons:

- You have not received any spam.

- Instead of creating an individual Spam Manager account for you, your Quarantine Administrator has decided to manage your spam in a different way.

If you think you should have a Spam Manager account, contact your Quarantine Administrator.

7.3 I Have Released a Message But Not Received It In My Inbox

The time it takes for a message to reach your inbox depends on a variety of factors that are independent of the Boundary Defense™ for Email Anti-Spam service, such as Internet delays. Please wait for two hours and then release the message again. If it still does not reach your inbox, contact your Quarantine Administrator.

****** End of Boundary Defense™ for Email: Spam Manager User Guide *****