PROOFPOINT ORGANIZATION ADMIN GUIDE

Logging in

1. Open a web browser and navigate to the appropriate URL
2. Enter your login email address and password
3. If you do not have a password, contact your company administrator

Resetting your Password

4. Click on your name in the top right-hand side of the screen
5. Select Profile
6. Type in your new password in the Password field
7. Type in your new password in the Retype Password field
8. Click Save

END USER SETTINGS

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, or email that has been cleared or blocked.

1. To view your Quarantine, click on the Log Search button on the left hand side
2. Select one of the following from the Type drop-down:
    a. Inbound: will include emails that were sent to you
    b. Outbound: will include emails that were sent by you
3. Select one of the following from the Status drop-down:
    c. Any: will include all email types
    d. Quarantined: will include emails that have been quarantined
    e. Reported: will include emails that have been reported as spam by the user
    f. Blocked: will include emails that have been blocked by a filter
    g. Cleared: will include emails that were received and delivered
    h. Cleared (but queued for delivery): will include emails that have been received but are queued for delivery
    i. Cleared (but bounced by destination): will include emails that have been received but were bounced by the target destination server

j. Cleared (released from quarantine): will include emails that have been released from the quarantine

4. Click on the Date field to select desired date range
5. Click on Date field to select desired date range
6. Click Search

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

Digests

This page allows you to change your quarantine digest delivery settings. The following settings can be changed:

1. To view and change these settings, navigate to User Management on the left hand side
    1. Click on Users
    2. On the top bar, click on Digests
2. Enable digests for user: enables quarantine emails to be sent to you
3. 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
4. Quarantine Digest delivery start time: the first time of the day that the digest should be delivered
5. Interval between digest checks: use this option to choose the frequency of digest delivery
6. Retention period: use this option to choose how long mail will remain in the quarantine
7. Timestamp of last Quarantine Digest Check: the timestamp of the last digest delivered to you
8. Include emails that have been quarantined by: will add emails quarantined as a result of a filter or sender list to the quarantine digest

Sender Lists

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

1. To add an entry to the Safe/Blocked sender list:
    a. Click on the Email tab
    b. Click on the Sender Lists tab
    c. Type in an SMTP address (user@domain.dev) or domain (domain.dev)
    d. You can add more than 1 entry by separating them with a comma or semi-colon
    e. Click Save
2. To remove an entry from the Safe/Blocked sender list:
    a. Click on the Email tab
    b. Click on the Sender Lists tab
    c. Highlight the entry you wish to remove and hit delete using your keyboard
    d. 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. Contact your company administrator to learn more about when to use the Emergency Inbox.

ADMIN FEATURES

Logs

Logs are a more advanced form of digest, showing what mail has been filtered and quarantined not just in your mailbox but across your whole company.

1. Select Search Logs from the left bar then select the sub section from the top bar:
2. All Users will show all users logs
3. Discovered Users
    a. Specific User allows you to see the logs for only 1 specified user
        i. Select the user by clicking the Logs button from the actions column on the right
    b. Specific Group shows logs for a specified group
        ii. Select the Group by clicking the Logs button from the actions column on the right
    c. Specific Functional Account
        ii. Select the Group by clicking the Logs button from the actions column on the right
4. Select one of the following from the Type drop-down:
    a. Inbound: will include emails that were sent to you
    b. Outbound: will include emails that were sent by you
5. Select one of the following from the Status drop-down:
    a. Any: will include all email types
    b. Quarantined: will include emails that have been quarantined
    c. Reported: will include emails that have been reported as spam by the user
    d. Blocked: will include emails that have been blocked by a filter
    e. Cleared: will include emails that were received and delivered
    f. Cleared (but queued for delivery): will include emails that have been received but are queued for delivery
    g. Cleared (but bounced by destination): will include emails that have been received but were bounced by the target destination server

   h. Cleared (released from quarantine): will include emails that have been released from the quarantine
6. Click on the Date field to select desired date range
7. From: enter who the email is from, if you wish
8. To: enter who the email is to, if you wish
9. Subject: enter a subject if you wish
10. Click Search

Users & Groups

This section allows you to manage all users and groups in your organization. Through this section, you are able to make changes to settings specific to a user or group.

1. Select Users Management from the Left bar, then select the sub-section from the bar below
   a. Users – for managing a user
   b. Groups – for managing a group
   c. Functional Accounts – for managing
2. For whichever User/Group you want to work, on you can either select Logs (see Logs section) or Edit form the action column on the right
3. Editing Users
   a. When selecting Edit on a User, you will be able to set specific settings related to them. The options will be the same that the users can set, so refer to the User Specific Section at the top of this document.
4. Editing Groups – this is an Advance Function and is managed by Daxtech. Please do not make changes here.
5. Editing Functional Accounts - allows you to manage shared mailboxes and distribution groups.
   a. Profile Tab: basic information about the account; do not adjust the name or email address
   b. Aliases Tab: contains the approved aliases for the account
   c. Digests: Settings for the quarantine reports, same as a user for the quarantine reports, same as a user
   d. Groups: which Groups the account is part of

Reports

Reports can give you various ways to view the data relating to your email usage. From here, you can see the number of emails coming to your company, how many messages are malicious (spam, virus, on a blacklist, etc), and other information relating to the how your emails are being treated.

1. Select Threat Reporting from the left bar and then any of the different categories
2. Select the report you wish to view from the bar on the left
   a. Each report will have various customizations such as inbound or outbound mail filters and being able to specify a date range
3. Scheduling reports
   a. Make a report a Favorite report
      i. Select the report you want from the report builder tab and click the small Cog on the right
      ii. Select Save as Favorite
      iii. Enter a Description and click the green check
   b. Select the Schedule List tab from the subtab bar at the top
   c. Click Add a Report Schedule
      i. Enter a description
      ii. Select how frequently you would like the report to be run
      iii. Enter email addresses for who you would like to receive the report
      iv. Select the report you want to run (this list comes from the favorites you make and save)