Sendio® E-mail Security Platform

User Guide

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INTRODUCTION

WELCOME

Congratulations! Your organization has decided to deploy the Sendio® E-mail Security Platform (ESP). This Sendio ESP is a network appliance that handles all inbound (and typically all outbound) e-mail that flows between your organization's mail server and the Internet. The ESP appliance is designed to re-establish e-mail as a trusted communications tool by *totally eliminating spam and e-mail threats* in the enterprise environment. Unlike filters, which require ongoing maintenance but remain only partially effective, Sendio's proactive approach to e-mail security incorporates a critical human element that brings authenticity and control to e-mail communications.

This guide, intended for the end user, provides details about:

- How the Sendio ESP operates in high level terms
- How to use the web interface
- How to interpret and use the daily Queue Summary e-mail
- How to use Email Continuity
- How to use the Sendio mobile interface
- How the Sender Address Verification Process works

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.

WARNING: A Warning identifies information that could lead to unintended consequences if not properly considered.

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

Menu Commands

The Sendio ESP 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*.

ESP Terminology

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

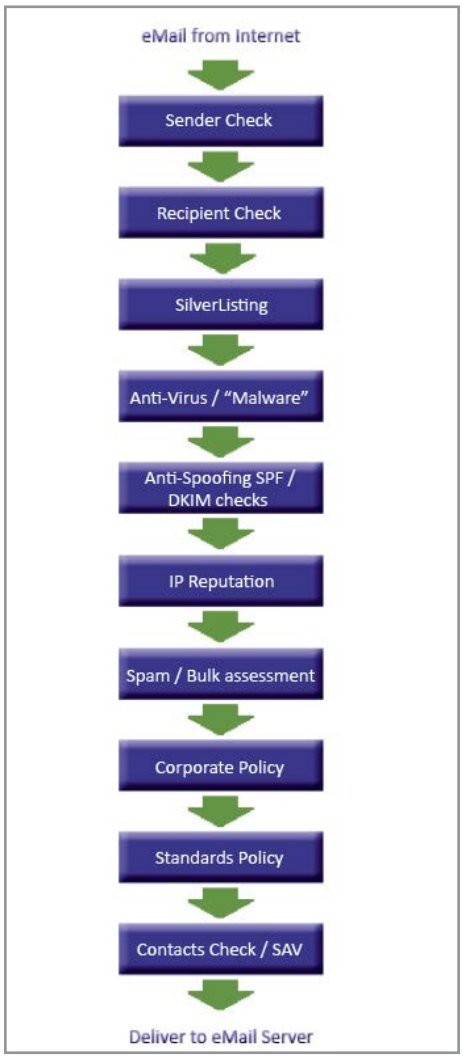
DOCUMENT REVISION HISTORY

Revision 2, August 12, 2014	
Changes	**Sections Affected**
Added icons for IP Reputation failure and Admin Hold.	"All Messages Option" on page 15
Added the blocks "Anti-Spoofing SPF/DKIM checks," "IP Reputation," and "Spam/Bulk assessment" to figure [1].	"HOW DOES SENDIO ESP WORK?" on page 3
Described how to view an inbound message and the buttons that appear when viewing an inbound message.	"Viewing Messages" on page 12
Added new section that describes the Sendio mobile interface.	"SENDIO MOBILE INTERFACE" on page 27
Added a new section that describes the Email Continuity feature.	"Email Continuity" on page 29
Added descriptions for anti-spoofing SPF/DKIM checks, IP reputation, and spam/bulk assessment.	"APPENDIX A: THE SENDIO ESP PROCESS" on page 31
Described the new HTML-based SAV feature.	"HTML-Based SAV Process" on page 33

HOW DOES SENDIO ESP WORK?

The unique capabilities of the Sendio ESP re-establish e-mail as a trusted communications tool by eliminating spam and e-mail threats completely from the enterprise environment. This results in dramatic time savings for users and IT staff, and reclaims lost resources for the company. Unlike filters and crude scoring mechanisms that require ongoing maintenance by IT staff but remain only partially effective, Sendio's proactive approach to e-mail security incorporates a critical human element that brings authenticity and control to e-mail communications.

All incoming e-mail from the Internet to your organization is routed through the Sendio ESP. The process of totally eliminating spam and threats is accomplished by applying multiple layers of validation checking and security on every incoming e-mail message (see figure [1]). Only e-mail transmissions that pass all layers end up being delivered to your inbox. For more information, see "APPENDIX A: THE SENDIO ESP PROCESS" on page 31.



[1] Sendio ESP High-Level Workflow Model

All Sendio security layers prior to the last layer (Contacts Check/SAV) typically block 99.5% of spam. These layers collectively form the Sendio Email Security Gateway™ solution. Traditional spam filters typically provide a block rate below 98%. While the difference between 98% and 99.5% may seem minor, with ever-increasing spam volumes into organizations, this extra 1-2% of spam leakage can result in thousands of additional spam emails in the Inboxes of your users.

The final Sendio validation layer, "Contacts Check / SAV," is key to eliminating the remaining unwanted messages that manage to pass the previous security layers. This final layer encompasses Sendio's Opt-Inbox™ solution. At this layer, the sender address is compared to your personal contact-list, as well as the system contact-list that your administrator may choose to populate. If the sender address matches a contact entry, the entry's "action" specifies whether messages from the sender should be Dropped, Held, or Delivered.

NOTE: The administrator can configure a contact in the system-list 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.

With Opt-Inbox™ , if the ESP does not find a match for the sender's address, it holds the message in your personal Inbound Message Queue and sends a Sender Address Verification (SAV) message to the original sender. This approach ensures the sender is a real person and not an automated sender generating unwanted bulk email, junk email, or spam. By default, the auto-generated SAV email is an HTML-formatted email containing a simple "Verify Me" button. The sender simply clicks the button to join your Community and get added to your Contacts, ensuring that all future messages are delivered immediately. There is also a text version of the SAV that your IT administrator can enable, which has the same results (see "APPENDIX B: SAV PROCESSES" on page 33).

Sendio Opt-Inbox™ is an essential ingredient in restoring trust in e-mail communications. On the one hand, it restores the sender's confidence in knowing that his important e-mail will be delivered reliably to the intended recipient. On the other hand, it ensures complete elimination of bulk, junk, or spam from reaching your own inbox.

NOTE: You can manually add individual entries to your personal contact-list to receive specific machine-generated e-mail. You can also import contacts from your e-mail client and from other senders to specify a list of "trusted" senders that need not be verified.

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SECTION 1: LOGGING IN TO THE WEB INTERFACE

Your network administrator has created an account for you on the Sendio ESP. Use one of the following web browser to access your account:

- Microsoft Internet Explorer 5.5 (or better)
- Firefox v1.5 (or better)
- Apple Safari 3 (or better)

To log in, browse to the URL address that was provided to you by your IT administrator.

EXAMPLE http://esp.acmecorp.com

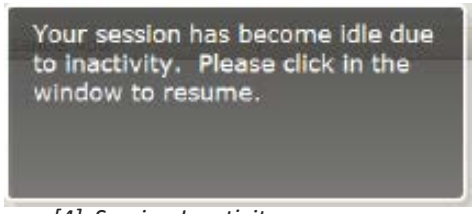
[2] Sendio ESP Default Login Window

A login screen will appear, as shown in Figure [2]. If your administrator enabled the "Remember Me" feature, you will see an additional checkbox as shown in Figure [3]. Choosing this option will cause the system to remember your login information for a duration that is set by your administrator. During this time, you will not be prompted for your e-mail and password when accessing the system.

[3] Sendio ESP Login Window with 'Remember Me'

To log in, enter your e-mail address and password, as specified by your administrator. The Sendio ESP can integrate with any compliant Directory Server. If your organization's ESP was set up to take advantage of this feature you will be able to login using the credentials you use to log in to your computer (e.g. your username/e-mail and network password).

The Sendio ESP will suspend your web browser session after a certain duration of inactivity (the default of 15 minutes can be adjusted by your administrator). A popup message will be displayed to indicate this has occurred. You can resume your session with a single click inside the browser window (Figure [4]).



[4] Session Inactivity message

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 e-mail password since the last login.

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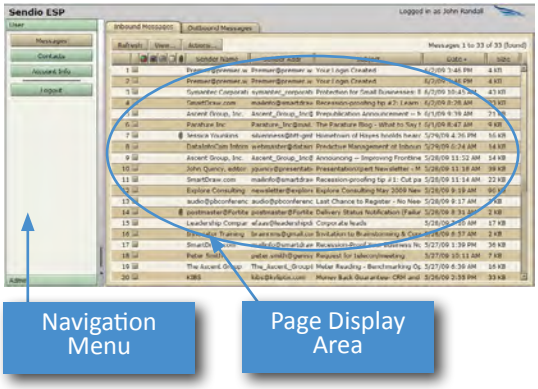
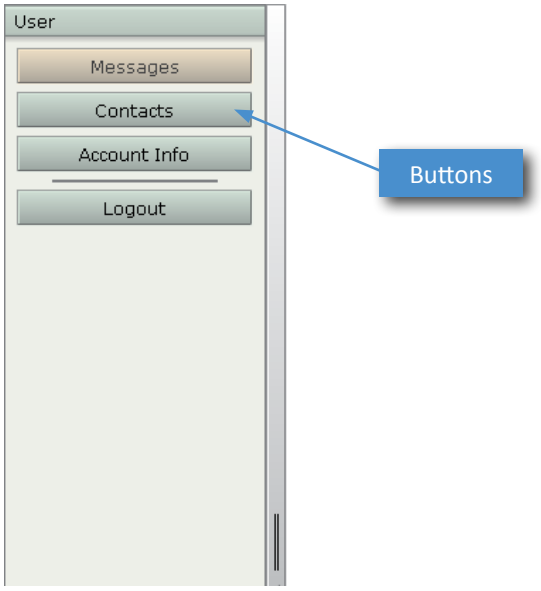
SECTION 2: USING THE WEB INTERFACE



[5] Web interface Layout

LAYOUT OVERVIEW

The web interface for the Sendio ESP is composed of a navigation menu (left side) and a page display area (right side), shown in Figure [5].

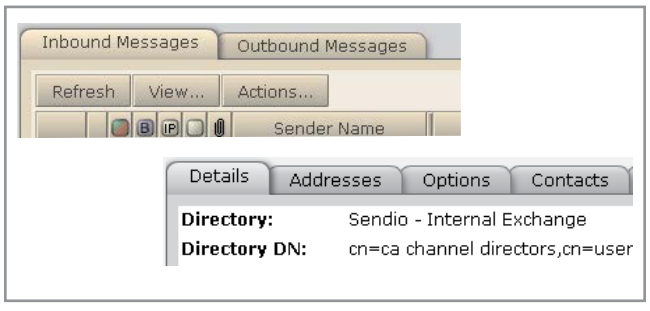


[6] User Navigation Menu

NAVIGATION MENU

The navigation menu is comprised of navigation buttons as shown in Figure [6]. These buttons provide navigation to the following sections:

- Messages - use to review and manage your Inbound and Outbound Message Queue
- Contacts - use to manage your accept/hold/drop contacts
- Account Information - use to review your account information and to set or test your log in password.



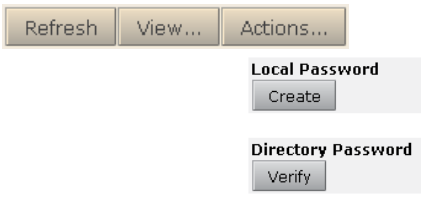
[7] Examples of Pages with Tabs

PAGE DISPLAYS

Clicking on different navigation menu buttons causes different Sendio ESP information and configuration pages to be displayed. Some pages show information in tables and others in list format (described in more detail below).

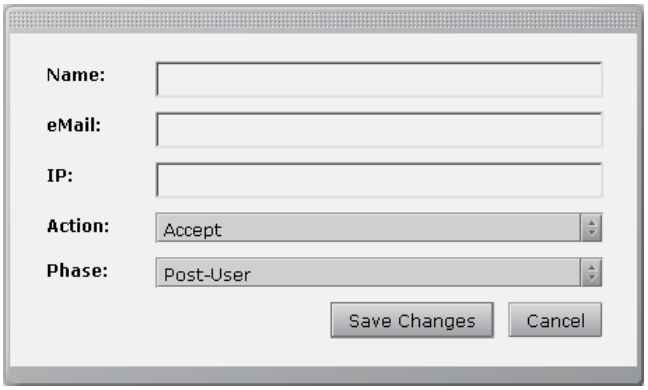
Some pages are actually multiple pages separated into “tabs”. Examples of tabbed pages are shown in Figure [7].

Pages include various control buttons that modify the display or change information, as shown in Figure [8].



[8] Examples of Control Buttons

Some control buttons cause additional pages (or "windows") to "pop up" on top of primary pages, as shown in Figure [9].



[9] Example Pop-up Window

TABLE-ORIENTED CONTROLS

Many pages display information in tables, such as the **Inbound Messages** and **Outbound Messages** pages. [10]

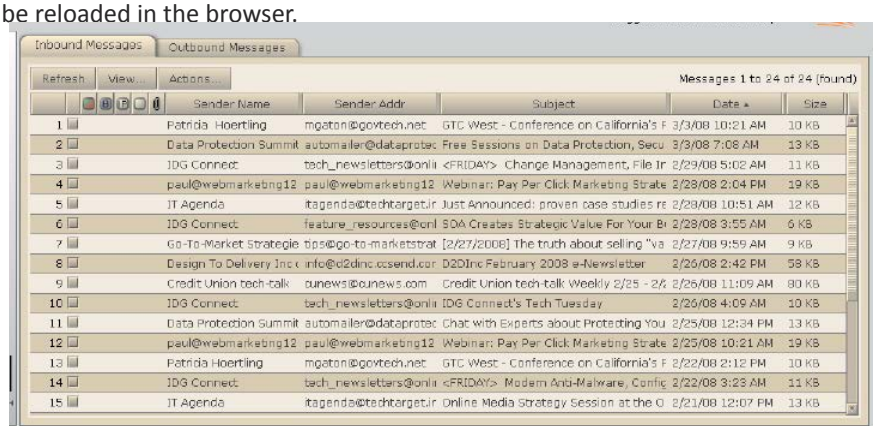
The number of records displayed in a table page is 50. If the table contains more than 50 records, controls are displayed in the upper right of the page that allow you to jump between pages.

The button causes a page to be reloaded in the browser.

The button opens a pop-up window that lets you create a new record.

The button opens either a drop-down list or a pop-up window of alternate criteria for viewing the displayed table.

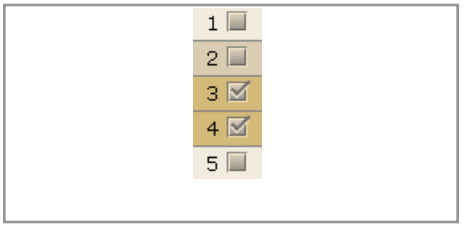
The button opens a drop-down list of actions that can be performed to modify the information in the table.



[10] Example of a Page Showing a Table

Specific records can be modified individually or in a batch by "checking" the box(es) next to the record number(s). [11]

> **NOTE:** Holding the Shift key and clicking lets you select a contiguous range of records. Holding the Ctrl key lets you select individual records as a group. When using this technique, avoid clicking directly on checkboxes.



[11] Check boxes

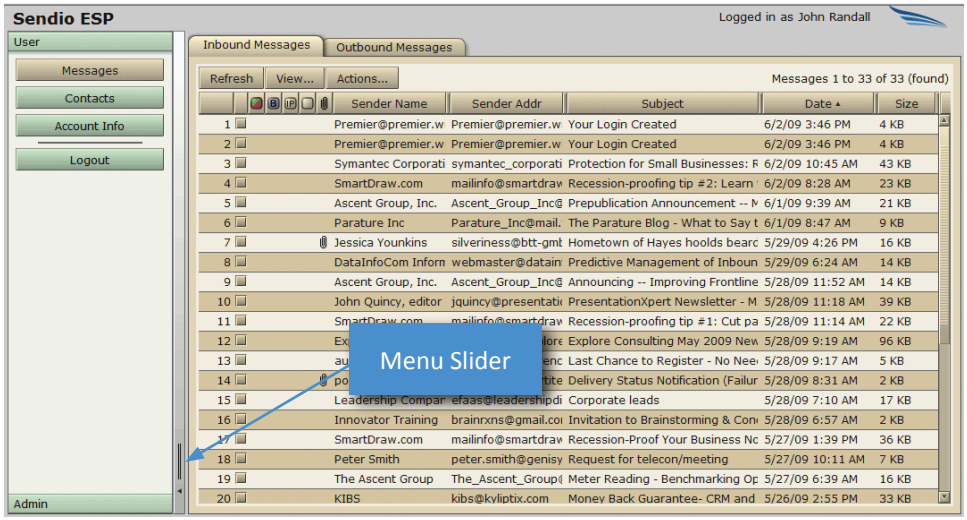
Clicking on a table column title or icon causes the table to resort the records in either ascending or descending order.

Subject	Date ▲
Credit Union tech-talk Weekly 3/3 - 3/7	3/4/08 11:21 AM
GTC West - Conference on California's F	3/3/08 10:21 AM
Free Sessions on Data Protection, Secu	3/3/08 7:08 AM
<FRIDAY> Change Management, File Ir	2/29/08 5:02 AM
Webinar: Pay Per Click Marketing Strate	2/28/08 2:04 PM

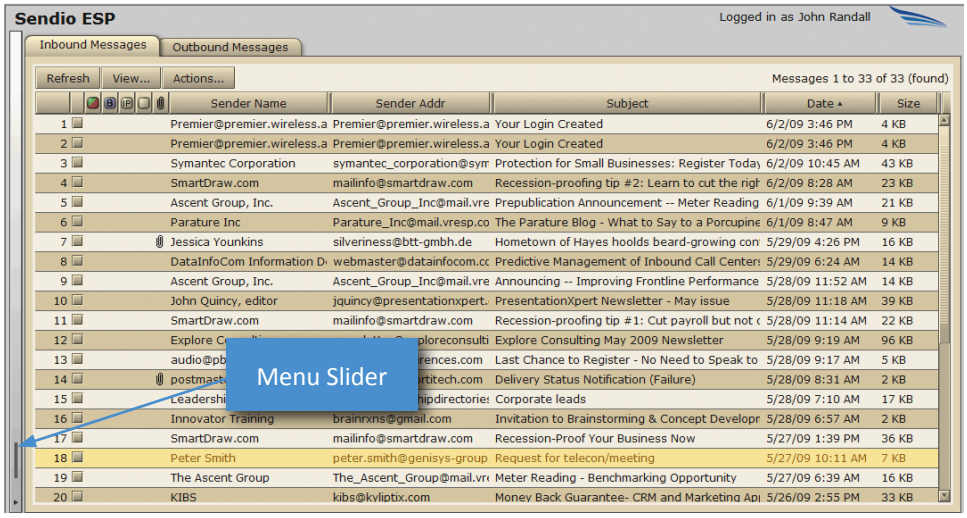
[12] Table Records Sorted by Date

Subject ▲	Date
Webinar: Pay Per Click Marketing Strate	2/28/08 2:04 PM
Webinar: Pay Per Click Marketing Strate	2/25/08 10:21 AM
Webinar Reminder: Leverage Channel F	2/21/08 8:22 AM
SOA Creates Strategic Value For Your Bi	2/28/08 3:55 AM
Show Your Commitment to Intellectual F	2/20/08 9:02 AM

[13] Table Records Sorted by Subject



[14] Navigation Menu Open



[15] Navigation Menu Closed

HIDING THE NAVIGATION MENU

Sometimes it is desirable to hide the navigation menu so that there is more room to see the page display. Clicking on the *Menu Slider* causes the navigation menu to close or reopen. [14] [15]

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SECTION 3: WEB INTERFACE FUNCTIONALITY

[16] User Navigation Menu

OVERVIEW

The main function of the Sendio ESP web interface is to provide access to your inbound and outbound message queues as well as providing you with the ability to manage your personal contact list. This list determines which senders are trusted for accepting inbound e-mail as well as senders that are explicitly blocked from delivering e-mail to your inbox.

The **User** Menu has three navigation buttons that allow you to access distinct sections of the Sendio ESP 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 Contacts list. If enabled by the administrator, you can also view the system contacts in a separate tab.

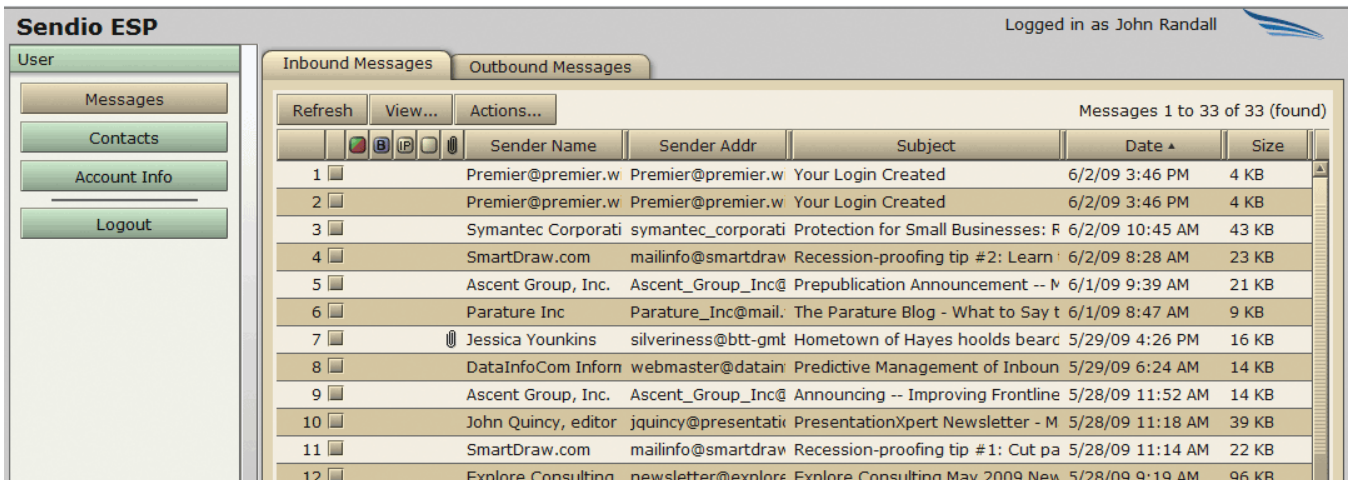
The Account Info menu option provides a summary of your Sendio ESP account.

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

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 ESP, the initial page display is your **Messages > Inbound Messages** *Message Queue*. By default, this view displays only pending messages. An example is shown in Figure [17].



[17] **Messages > Inbound Messages** *Pending Queue*

NOTE: Your Administrator may have disabled the **Outbound Messages** tab shown in Figure [17].

VIEWING MESSAGES

You can view an inbound message before accepting it by double-clicking the message. When you double-click a message, the message opens and the following buttons appear between the header and body of the message (see figure [18]).

History displays history information below the buttons. The history includes the date and time, event, and event details associated with the message (see figure [19]).

Original opens a browser window with the message shown in HTML format.

Accept releases and delivers the selected message.

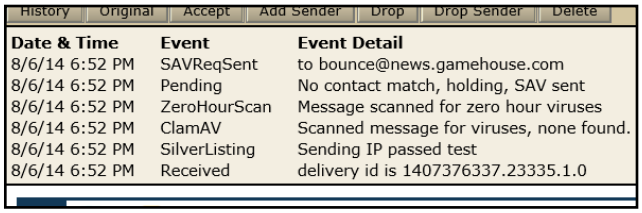
Add Sender receives selected and future messages from the same sender. Messages are delivered to the top of your inbox and the message sender is added to the Accept-List. The history of this message indicates it was released by user request. All future messages from this sender are delivered to your inbox immediately upon arrival. For additional messages in the pending queue from this sender, you are given the option of releasing those messages as well.

Drop drops the selected message.

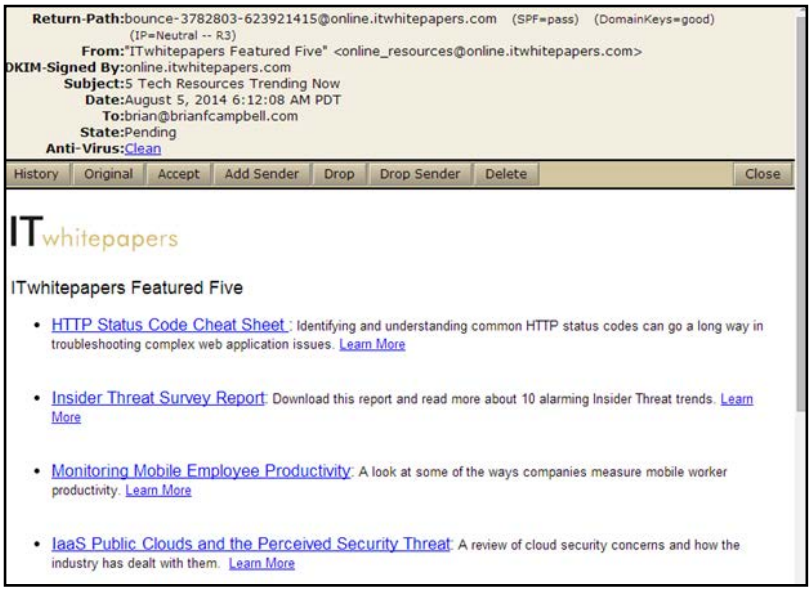
Drop Sender drops the selected message and creates a drop contact for the selected message. Clicking this button also gives you the option to drop all pending messages for the selected sender. All future messages from this sender are dropped and not delivered to your inbox.

Delete deletes the selected message.

Close closes the message.



[19] Sample Email History



[18] Example of an Open Email Message

WHAT'S A "QUEUE" ?

A "queue" is a list of messages. In the Sendio ESP, a queue is presented in a table format, like the Inbound Messages Queue above.

As a User, you have several different queues that hold your messages. These include:

- the *Pending Queue*, which lists messages that are waiting for someone to verify that they are "legitimate"
- the *Delivered Messages Queue*, which lists all of the messages that the ESP has delivered to your inbox
- the *Held Messages Queue*, which "holds" messages that have some sort of policy violation until an Administrator decides what to do with them
- the *Dropped Messages Queue*, which lists all of the messages that the ESP has been directed to "drop", usually from a known spammer's address
- the *Rejected Messages Queue*, which lists any messages that have been rejected by the ESP, such as those containing viruses

WHAT'S A "VIEW" ?

The ESP gives you a way to get different "views" of your queues. For example, you can look at a list of all of the messages sent to you from 'ibm.com'.

When you first log in to your ESP account, your **Inbound Messages** *Pending Queue* is displayed. This table shows all of the messages sent to you that have successfully passed through the e-mail integrity workflow and are now simply waiting for sender verification.

The **Outbound Messages** tab displays messages that have been sent to destinations outside the organization. There is no need to delete messages from these queues as the ESP will delete them automatically after a certain number of days. The number of days that a message is held in queue is determined by your Administrator and can range from one day to four weeks.

MESSAGES CONTROLS

At the top of the **Inbound Message** page, there are three buttons:

,

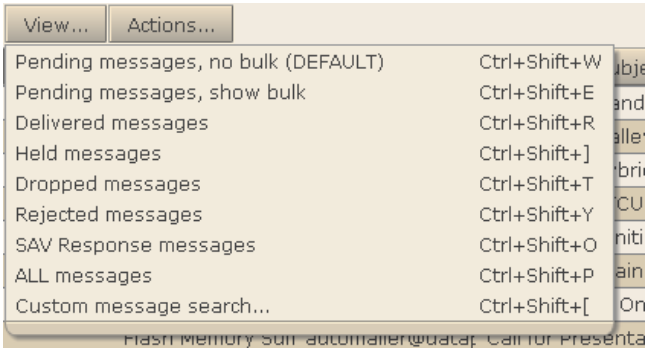
, and

.

Refresh Button

While a view will automatically update at a regular interval, the

button allows the **User** to initiate the refresh process at any time. The ESP will reload all queued messages in the display.



[20] **Inbound Messages View...** *Button Drop-Down Menu*

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.

Each view represents a search performed by the ESP (e.g., the ESP searches for all delivered messages when the *Delivered messages* view is selected). If you would like to create a customized search, select *Custom message search…*. In addition, the keyboard shortcut for each view is displayed to the right of the selection.

Pending Messages Options

When the ESP is first installed, it will block all "anonymous" e-mail sent to your e-mail system. However, it may also prevent delivery of machine-generated e-mail that you may actually wish to receive (e.g., notifications from industry experts, e-Newsletters, receipts for airline reservations). In order to ensure you receive these machine-generated e-mail messages, you will need to add these senders to your *Accept-List*.

Check the **Inbound Messages** queue each day until all the machine-generated messages that you wish to receive have been added to your *Accept-List* (see "CONTACTS" on page 19 to manually create an *Accept-List* contact).

Delivered Messages Option

Selecting this option will modify the view to display only messages that have been delivered through to the e-mail server and have received an acknowledgement of receipt from the e-mail server.

Dropped Messages Option

Selecting this option will modify the view to display only messages that have been dropped as a result of policy settings such as an unwanted sender. Double-clicking a message and then clicking the **History** button will detail the policy that caused the message to be dropped.

Rejected Messages Option

Selecting this option will modify the view to display only messages that have been rejected. A message could be rejected due to policy reasons or because the e-mail server did not accept the message. As with dropped messages, clicking the **History** button will detail the policy that caused this message to be rejected.

SAV Response Message Option

Selecting this option will modify the view to display only messages that have been received as a result of the Sender Address Verification process.

All Messages Option

Selecting this option will modify the view to display all messages that have been handled for you by the ESP. In this view, icons are used to identify various types of messages:

A green dot indicates that the message is from a known sender and has been delivered to your inbox. A faded green dot indicates that the system has not yet been able to deliver the inbound message to your mail server. On the outbound, a faded green means the ESP cannot yet deliver the message to the intended destination. In both cases, the ESP will retry for a period of time.

A green dot with a red "X" superimposed indicates a message that has been accepted by the ESP but rejected by the MTA. Clicking the message and selecting the **History** button will show the reason for the rejection.

A red dot indicates that the message has been dropped and has not been delivered to your inbox. Clicking the message and selecting the **History** button will show the reason for the drop.

A red "X" indicates a message that has been rejected completely by the ESP.

A black dot with a "V" superimposed indicates a message that is infected with 1 or more viruses.

A black dot with a "Z" superimposed indicates a message that is part of an ongoing zero-hour virus outbreak.

A red dot with a "V" superimposed indicates a message that is suspected of containing one or more unknown viruses.

A yellow dot with a "U" superimposed indicates a message that is "unscannable." The message may be corrupted or contains encrypted attachments.

A yellow dot with a "?" superimposed indicates a message that has not been FULLY scanned by the virus scanning service.

A Black dot with a "?" superimposed indicates a message that has not been scanned AT ALL by the virus scanning service.

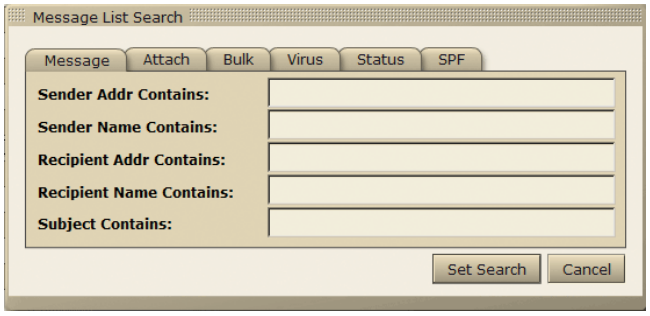
A blue dot with a "B" superimposed indicates that the message is classified as probable bulk mail.

A blue dot with a "L" superimposed indicates that the message is classified as a list message. These messages will be automatically released if the List Auto Accept feature has been enabled by your IT administrator.

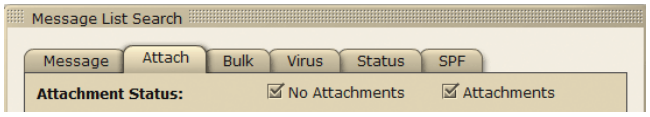
A black dot with "IP" superimposed indicates a sender IP address reputation failure.

A red dot with an exclamation point (!) superimposed indicates an Admin hold. Only your IT administrator can release such a message.

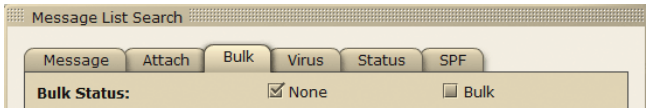
Messages without indicator dots are being held by the ESP either pending verification by the sender or because they match a contact on the *Hold-List*.



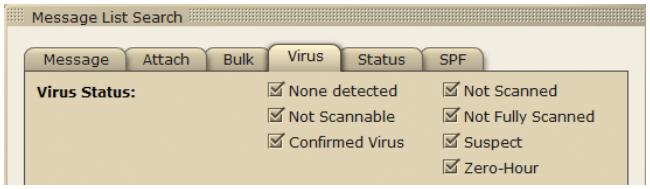
[21] Custom Message Search...
Messages *Tab*



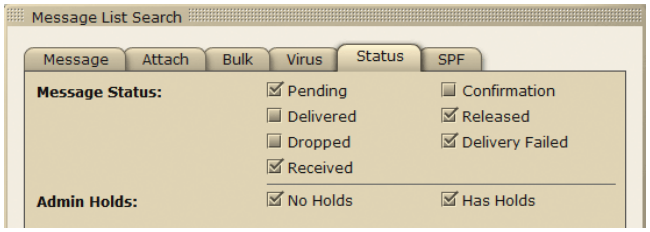
[22] Custom Message Search...
Attach *Tab*



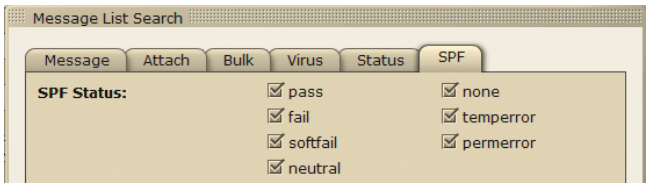
[23] Custom Message Search...
Bulk *Tab*



[24] Custom Message Search...
Virus *Tab*



[25] Custom Message Search...
Status *Tab*



[26] Custom Message Search...
SPF *Tab*

Custom Message Search... Option

Selecting the *Custom Message Search...* option opens a tabbed pop-up window which enables you to perform searches based on:

- Message attributes (e.g., Sender Address, Sender Name, Message Subject)
- Attachment presence
- Bulk
- Virus indication
- Message status
- SPF result

The **Message** tab on the Custom Message Search... window (shown in Figure [21]) allows you to set search criteria for message attributes such as Sender Address, Name, and Subject. You do not need to enter complete information. The search will look for the string of characters that have been entered and will match messages accordingly.

The **Attach** tab allows you to narrow the search to those messages with or without attachments according on the option selected.

The **Bulk** tab allows you to include or exclude bulk messages in the search results (see "Bulk Messages" for more information). The check boxes in the *Message Status* section enable you to narrow your search to specific categories of messages.

The **Virus** tab allows you to the search by the categorization of virus-laden messages. Selecting a category will include any messages with a matching category in the search results. There is no limit to the number of categories that can be selected.

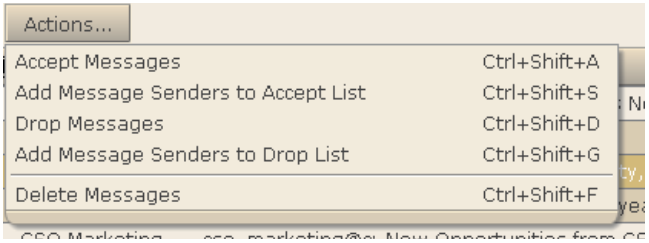
The ESP tracks the status of every message. The **Status** tab allows you to narrow or expand the search to include the status of the messages. Selecting a status will include any messages with a matching status in the search results. There is no limit to the number of categories that can be selected.

The **SPF** tab enables you to narrow your search to specific types of Sender Policy Framework (SPF) results. This feature is designed for advanced users, and unless you are familiar with SPF, Sendio recommends that you leave all the SPF boxes checked. SPF will compare the IP address of the origination of the message against a list of permitted sender hosts for the DNS record of the domain.

After you have entered your search criteria, click the **Set Search** button to begin your search.

Once a search has been executed, the number of messages that satisfied the search criteria will be displayed in the upper-right corner.

If you do not see a message that you expect when executing a custom search, return to the ALL option on the message list and then perform your custom search again.



[27] **Messages > Inbound Messages > Actions...** *Drop-Down Menu*

ACTIONS... BUTTON

If there is a message that has yet to be verified, or if it is from a mailing list 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.

NOTE: Holding the Shift key and clicking lets you select a contiguous range of records. Holding the Ctrl key lets you select individual records as a group (but don't Ctrl-Click on the check boxes).

Accept Messages

To receive the selected message(s), choose this option and the message(s) will be delivered to the top of your inbox. The history of this message(s) will now indicate that it was released by user request. This option will not add the sender to the *Accept-List*.

Add Message Senders to Accept List

To receive the selected message(s) and all future messages from the same sender, choose this option, and the message(s) will be delivered to the top of your inbox and the message sender will be added to the Accept-List. The history of this message will now indicate that it was released by user request. All future messages from this sender will be delivered to your inbox immediately upon arrival.

In the case where there are additional messages in the pending queue from this sender, you will be given the option of releasing those messages as well. [28]

[28] Message Release Dialog

Drop Messages

Selecting *Drop Messages* removes the selected message(s) from the *Pending Queue*, but they are still viewable via the **Messages > Inbound Messages > View...** *Dropped Messages* option.

Add Message Senders to Drop List

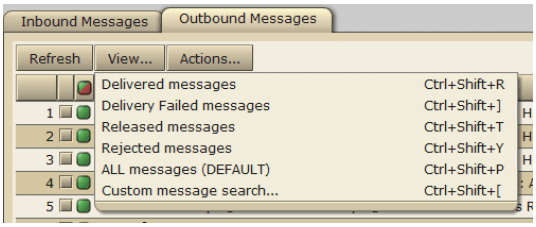
If your Administrator has enabled this function, selecting the *Add Message Senders to Drop List* menu option:

- causes all selected messages to become *Dropped Messages*
- adds the message senders to your *Contact List* as *Drop Contacts*

> **NOTE:** Do not add *Drop Contacts* to your *Contacts List* unless you are receiving unwanted e-mail from the same sender repeatedly. A high number of *Drop Contacts* lowers system performance.

Delete Messages

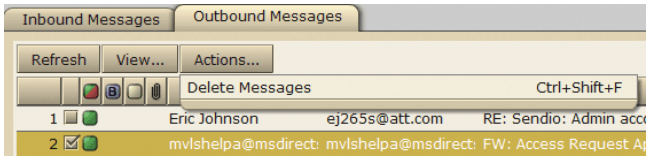
The *Delete Messages* menu option immediately deletes the selected message(s) from your *Message Queue*. Deleted messages are not recoverable.



[29] **Outbound Messages View...** *Button Drop-Down Menu*

CHECKING THE QUEUES

Your *Message Queue* will be self-sufficient once your contacts are accepted and stabilized into the dynamic *Accept-List*. Check the ESP **Inbound Messages** queue each day until all machine-generated messages that you want to receive are added to your *Accept-List*. Once this process is completed (usually in one week), you may not need to view the **Inbound Messages** queue again. If you subscribe to a new machine-generated e-mail sender or make an online purchase that sends a receipt via e-mail, you may need to re-check this view to accept the message sender.

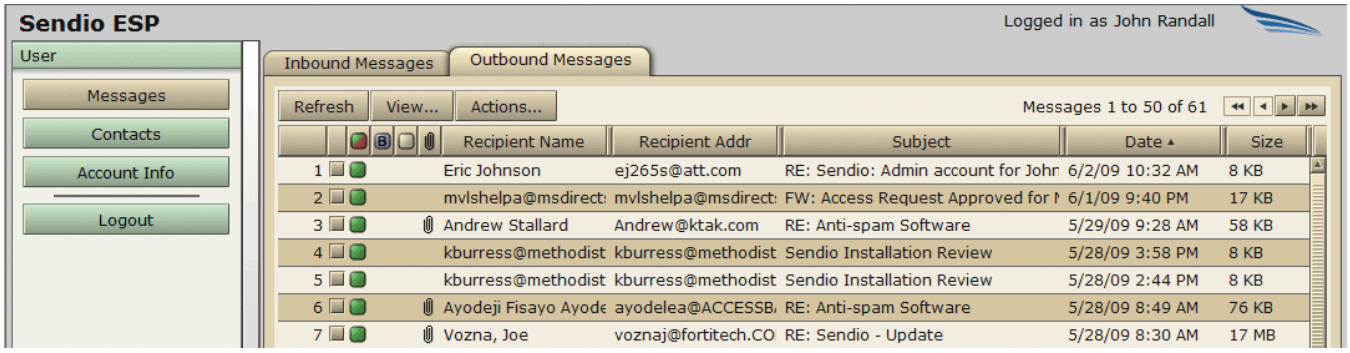


[30] **Outbound Messages Actions...** *Button Drop-Down Menu*

MESSAGES > OUTBOUND MESSAGES

> **NOTE:** Your Administrator may have disabled the **Outbound Messages** tab shown in Figure [30].

The **Outbound Messages** queues record all messages that you send outside your organization. [31]



[31] Outbound Messages Queue

If a message has a faded green square icon, this indicates that delivery has been deferred, meaning the message could be delivered but has not yet been delivered.

If there is a green icon with a red X, delivery was rejected, meaning the recipient's mail server would not accept the message.

If you double-click the message, and then click the **History** button, the current status of the message will be displayed.

The View... and Actions... buttons for **Outbound Messages** provide options that work in a manner similar to those previously described for the **Inbound Messages**. (Figures [29] and [30])

[32] **User** *Navigation Menu*

CONTACTS

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

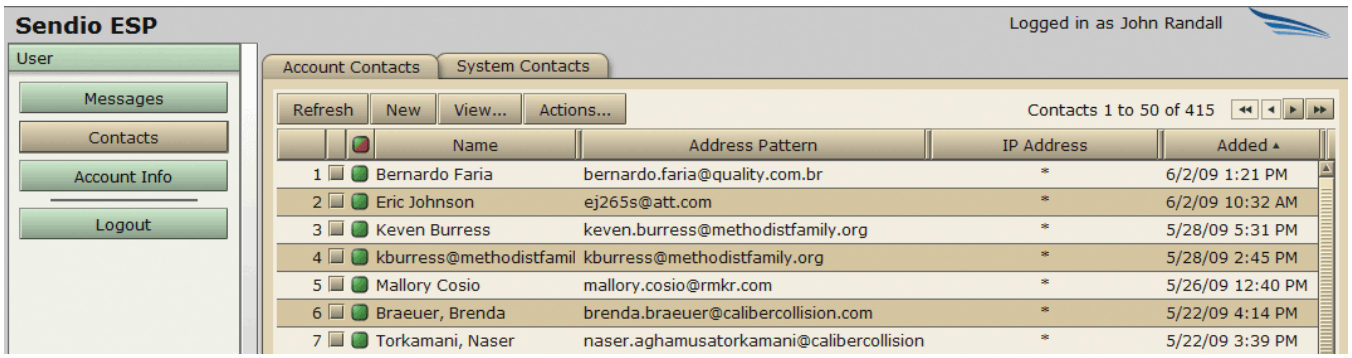
Selecting this button displays a view of the **Contacts > Account Contacts** page, shown in Figure [33]. This view displays a list of known senders whose messages are automatically handled by the ESP.

These addresses represent individuals or organizations whose e-mails are to be either *accepted*, *held* or *dropped* if they are received by the ESP.

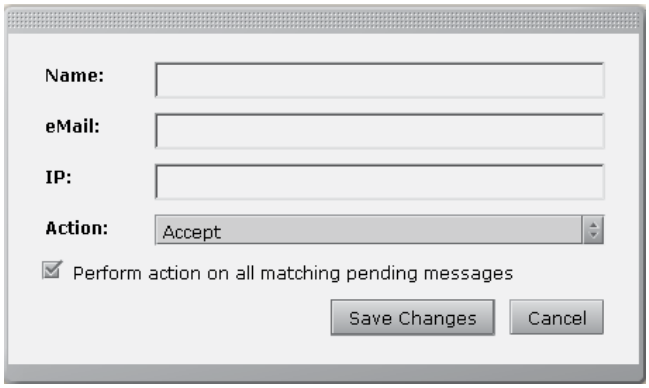
> **NOTE:** **Contacts** pages are sorted by the date that the contact was added to the system. The data may be re sorted by clicking on any of the column headings at the top of the table.

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.

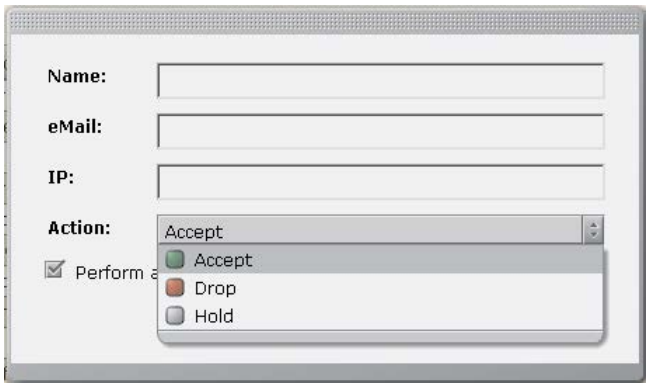
- A green icon indicates that the address of this "sender" is on your *Accept-List* and that messages from this sender are to be immediately delivered to your inbox.



[33] **Contacts > Account Contacts Page**



[34] New Contact Pop-up Window



[35] New Contact Action Drop-Down Menu

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. The pop-up window shown in Figure [34] appears. Enter the name and e-mail address of the contact in the appropriate fields. A wildcard (*) may be used at any point in the e-mail address.

NOTE: The *Name* field is for display purposes only.

IP Field

The *IP* field allows you to input a specific IP address from which the corresponding e-mail address must originate. Mail from this e-mail address with a different IP address will be presumed to be "spoofed" and therefore dropped. If left blank, the system will auto-populate the IP field with a "*" indicating that this particular contact's e-mail can come from any IP address. *Accept-List* contacts without a wildcard in the address are processed before those addresses with a wildcard.

Only one IP address can be specified per contact.

Action Field

The *Action* field has three options on a drop-down menu. [35]

- *Accept* adds the contact to your *Accept-List*
- *Drop* adds the contact to your *Drop-List*
- *Hold* adds the contact to your *Hold-List*

NOTE: *Drop-List* contacts should be created *only* in cases where messages are reaching your inboxes from a well-known unwanted sender. Excessive use of *Drop* contacts can adversely affect system performance.

The *Hold* action is like a *Drop*, but leaves a message visible in the *Pending Queue* so that manual handling can be done. Having a *Hold* contact is also like having no contact at all, but stops the ESP from sending an SAV message out. It can be useful for dealing with domains that use auto-responders.

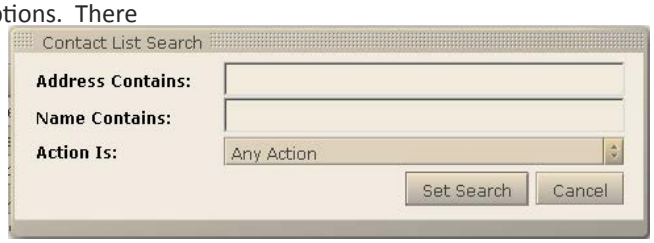
CHANGING CONTACT INFORMATION

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.

[36] **Contacts > Account Contacts > View...** *Button Drop-Down Menu*

CHANGING THE VIEW OF THE CONTACTS PAGE

The default view of the **Contacts** page shows all contacts. Clicking on the View... button opens a drop-down menu with other view options. There are also shortcut keys that can be used to initiate these views. [36]

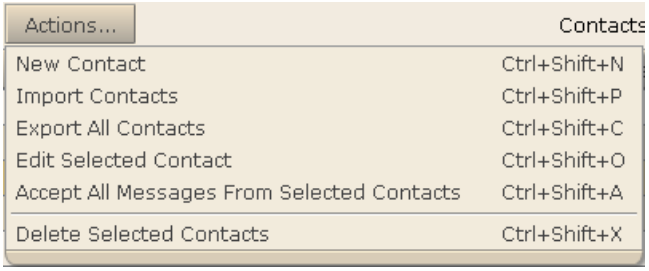


[37] Custom Contact Search

Custom Contact search...

If a specific contact needs to be located, the *Custom Contact Search...* option can be used.

In the *Contact List Search* pop-up window, a portion of the address or name, and the action to *Accept*, *Drop* or *Hold* can be entered; it is not necessary to enter all three. Once the information has been entered, click the *Set Search* button, and the screen will display the results of the custom filter request. If an expected contact does not display, reduce the requirements in the custom filter.



[38] **Contacts > Account Contacts > Actions...** *Button Drop-Down Menu*

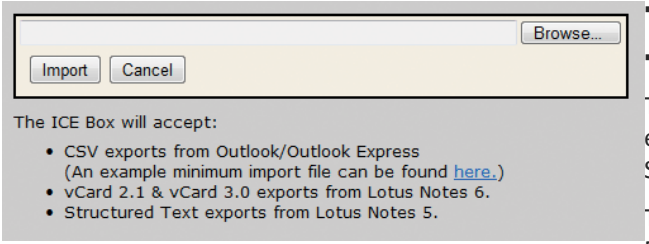
CONTACTS > ACCOUNT CONTACTS > ACTIONS...

The Actions... buttons opens a drop-down menu as shown below.

The *New Contact* action provides the same function as the **New** button described above.

IMPORT CONTACTS

The *Import Contacts* action opens a window, shown in Figure [39], which web interfaces you through the process of importing a set of contacts from an external sender. Three formats are supported:



[39] Import Contacts Window

- Comma Separated Value (CSV)
- vCard 2.1 and vCard 3.0 from Lotus Notes 6
- Structured Text exports from Lotus Notes 5

These contacts can be from an MS Exchange database or other e-mail system, an enterprise CRM system such as Oracle or SAP, or from any other contact database.

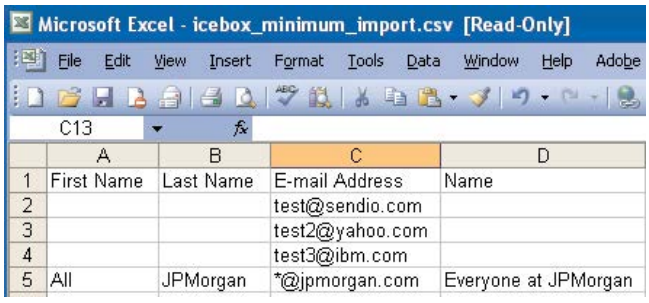
The CSV file must be structured in a specific format, shown in Figure [40]. An example is viewable by clicking on the word "here" in the pop-up window instructions.

In the import window, click the *Browse…* button to specify the CSV file to import, and then click the *Import* button. All imported contacts will be added to the *Accept-List*.

NOTE: It may be necessary to disable the pop-up blocker in order for the import process to function properly.

NOTE: When exporting a contact list from MS Outlook, accept all the defaults in the export action. The resulting file will be in the correct format for import into the ESP.

TROUBLESHOOTING TIP: An import will be unsuccessful if there is no header row as indicated in the example file. The columns can be in any order.

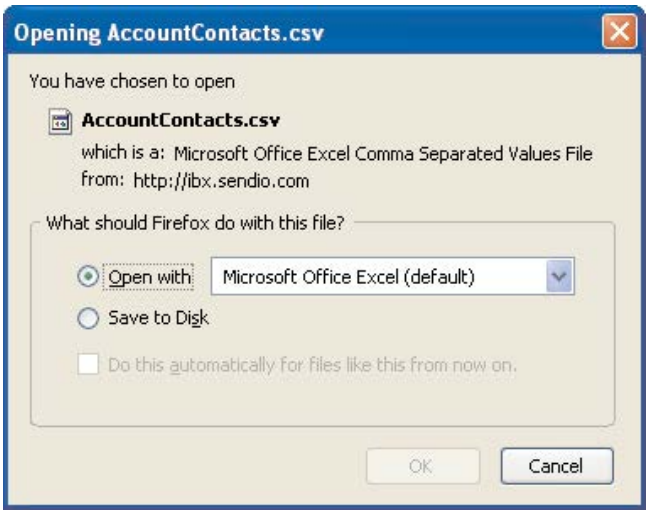


	A	B	C	D
1	First Name	Last Name	E-mail Address	Name
2			test@sendio.com	
3			test2@yahoo.com	
4			test3@ibm.com	
5	All	JPMorgan	*@jpmorgan.com	Everyone at JPMorgan

[40] Contact Import CSV File Structure

EXPORT ALL CONTACTS

The *Export All Contacts* action executes a process to write all of the contacts to a CSV file, readable by MS Excel and other applications. A dialog box shown in Figure [41] opens, where you specify what to do with the exported file. A portion of an exported file is shown in Figure [42].



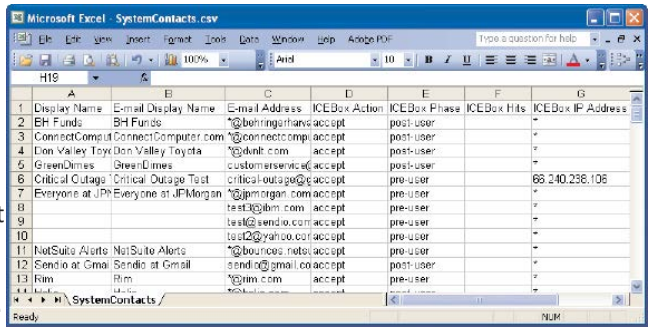
[41] Export Contacts Dialog

EDIT SELECTED CONTACT

Select a record to edit by clicking the record or the check box next to the record number. Then click **Actions...** *Edit Selected Contact.* Only one contact can be edited at a time. If more than one record is selected, an *Alert* dialog box will be displayed as shown in Figure [43].

DELETE SELECTED CONTACTS

The *Delete Selected Contacts* action causes all of the records that have been selected (by clicking their check box) to be removed from the database. If a contact is removed, and a message is subsequently received from that address, the sender will receive an SAV message.

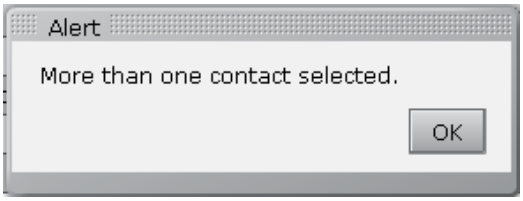


[42] Exported Contacts

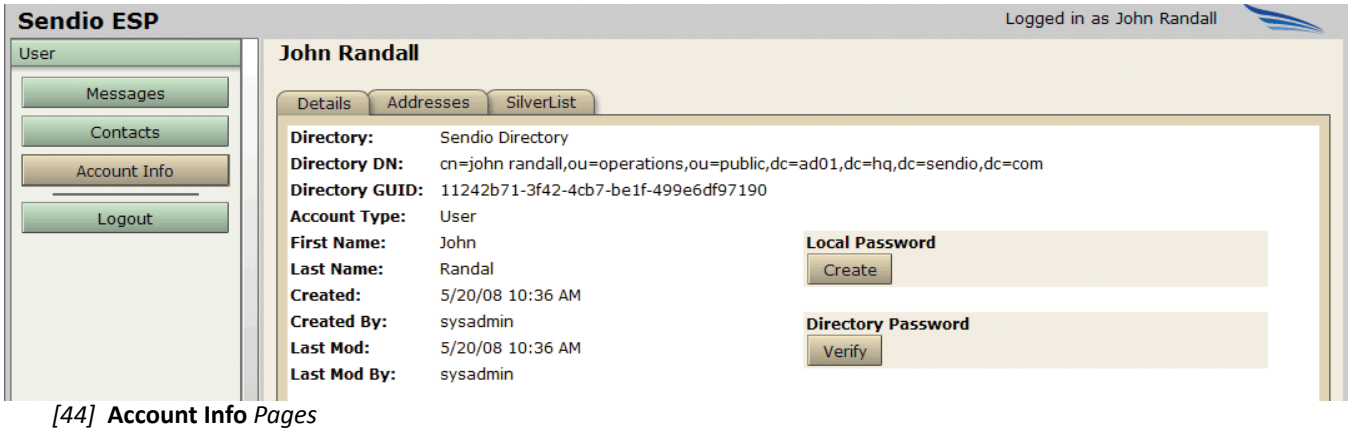
ACCOUNT INFO AND LOGIN PASSWORD

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

Selecting this button displays a set of tabbed pages, shown in Figure [44].



[43] Alert Dialog



[44] **Account Info** *Pages*

ACCOUNT INFO > DETAILS

The **Account Info > Details** page is the default display and shows a summary of your account information. This page also provides you access to Local and Directory passwords. For the Directory Password, a **Verify** button lets you confirm that you know the correct network/computer password in your on-site directory.

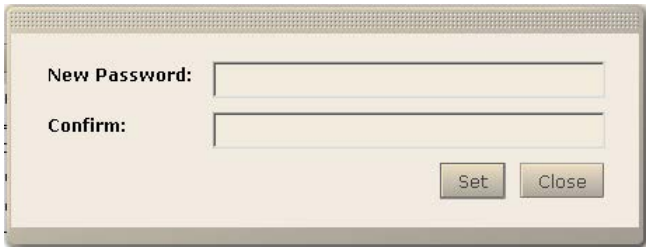
[45] **User** *Navigation Menu*

Your IT administrator may have provisioned a Local Password for your Sendio Account. If a sync from your one-site directory server to Sendio was not provisioned, for example, your network/computer password cannot be used to login to Sendio. As a result, your IT administrator must set a Local Password for you to log in. When a Local Password is set, the **Create** button does not appear in your Details page in the **Local Password** section. Instead, the three buttons in figure [46] let you verify, change, or remove the Local Password.

[46] Verify, Change, and Remove Buttons

You can also use the **Create** button self-service without IT administrator involvement if you use a directory password, but also want a separate Local Password on Sendio. Examples of why you might set a separate local password are:

- To enable a third party to access your Message Queue (i.e., delegation) without sharing your network password. To establish a Local Password, click the **Create** button and enter a password in the **New Password** and **Confirm** fields. [47]
- To have a fail-safe login method in case Sendio cannot sync to your on-site directory server.



[47] Create Local Password

ACCOUNT INFO > ADDRESSES

The **Account Info > Addresses** page [48] displays all e-mail addresses that are associated with your account. If you have other e-mail addresses that are associated with your account, but are not listed in this view, then any messages sent to those e-mail addresses will not be accepted and will generate a bounce message back to the sender. If there are e-mail addresses listed that should not be associated with your account, please report them to your Administrator.

The blue icon indicates which address is the Primary Address. Primary Addresses receive system messages and the *Queue Summary* messages, if enabled.

[48] Account Addresses

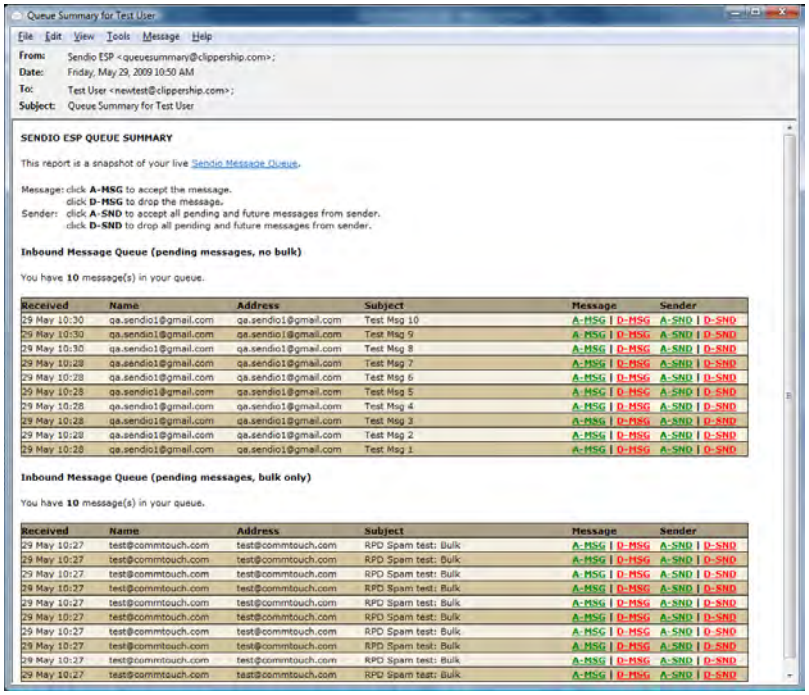
SECTION 4: QUEUE SUMMARY

If your IT administrator has enabled the *Queue Summary feature, an* e-mail that shows the most recent 50 records in your *Pending Queue* will be sent to your inbox on a daily basis. This e-mail 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 e-mail, 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 are completely analogous to the functions on the ESP web interface.


Queue Summary for Test User

File Edit View Tools Message Help

From: Sendio ESP <queuesummary@clippership.com>;
Date: Friday, May 29, 2009 10:50 AM
To: Test User <newtest@clippership.com>;
Subject: Queue Summary for Test User

SENDIO ESP QUEUE SUMMARY

This report is a snapshot of your live Sendio Message Queue.

Message: click **A-MSG** to accept the message.
click **D-MSG** to drop the message.
Sender: click **A-SND** to accept all pending and future messages from sender.
click **D-SND** to drop all pending and future messages from sender.

Inbound Message Queue (pending messages, no bulk)

You have **10** message(s) in your queue.

Received	Name	Address	Subject	Message	Sender
29 May 10:30	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 10	A-MSG | D-MSG	A-SND | D-SND
29 May 10:30	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 9	A-MSG | D-MSG	A-SND | D-SND
29 May 10:30	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 8	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 7	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 6	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 5	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 4	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 3	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 2	A-MSG | D-MSG	A-SND | D-SND
29 May 10:28	qa.sendio1@gmail.com	qa.sendio1@gmail.com	Test Msg 1	A-MSG | D-MSG	A-SND | D-SND

Inbound Message Queue (pending messages, bulk only)

You have **10** message(s) in your queue.

Received	Name	Address	Subject	Message	Sender
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND

[49] Typical Queue Summary Message

Inbound Message Queue (pending messages, bulk only)

You have **10** message(s) in your queue.

Received	Name	Address	Subject	Message	Sender
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	A-MSG | D-MSG	A-SND | D-SND

[50] Queue Summary Message Addition When "Show Alternate" Parameter is Enabled

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SECTION 5: MOBILE INTERFACE

Sendio provides a mobile interface for users who are on the go. To access the new interface, go to http://*url*/m (for example: http://esp.acmecorp.com/m) in a web browser on your phone or mobile device, and then log in to your Sendio account.

Unlike the standard web interface, the mobile interface does not use Adobe Flash in the browser. For convenience, the Sendio web server software detects smartphones and tablets, and redirects them automatically to the mobile interface without requiring user intervention.

The Sendio mobile interface (see figure [51]) is built on the same underlying technology as our current web interface, and includes many of the features of that interface, including:

- Instant actions
- Access to My Account, contacts, and messages
- View and sorting capabilities

We've worked hard to make this interface feel perfectly natural as a finger-driven mobile interface. We've placed tap targets where your fingers are likely to be. We've also reduced the number of round-trip requests between your device and our servers, making the interface load and operate fast, even over the high-latency connections of mobile networks.

The drop-down list next to **Sendio@** lets you access your account information, contacts, or messages. After you make your selection, click **Go** to display your selection in the center of the Sendio mobile interface. The other drop-down lists that appear are based on your selection.

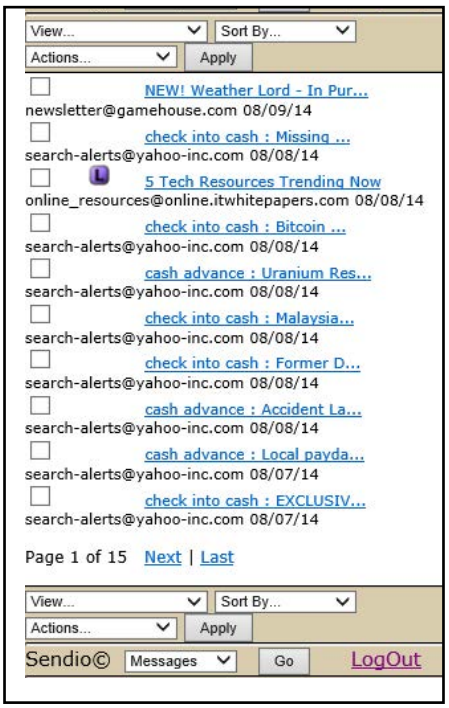
If you select **Messages**, for example, the following drop-down lists are available:

lets you select the messages you want to view, such as Delivered, Dropped, or Rejected. Messages appear in the center of the interface, with the subject line of the message and a box you can check to perform an action using the **Actions** drop-down list.

lets you sort the items in the selected message queue by sender address, subject, or date.

performs actions such as accepting or dropping messages on the messages you checked in the center of the interface.

If the number of contacts or messages exceed what can be shown, use the **Next** and **Last** links to move to other pages. The **Logout** link logs you out of the interface.



[51] Sample Sendio Mobile Interface

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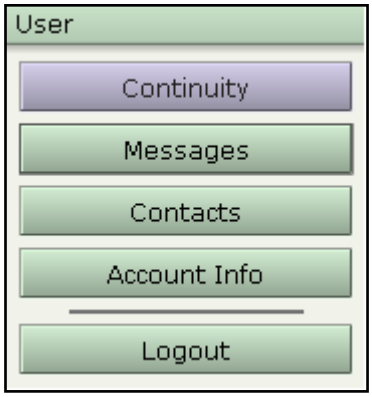
SECTION 6: EMAIL CONTINUITY

Sendio software versions 7.1 and later support an Email Continuity feature that allows you to send and receive email messages, and stay connected to business clients, even when your on-site mail server has an issue. You can compose, reply, send, and receive emails from the same Sendio web user interface you already use to manage your "pending queue" of held messages.

Email Continuity requires a license from Sendio. For more information, please contact sales@sendio.com.

If your administrator enables Email Continuity, a purple **Continuity** button appears at the top of the navigation menu (see figure [52]). You click this button to open the Continuity Inbox.

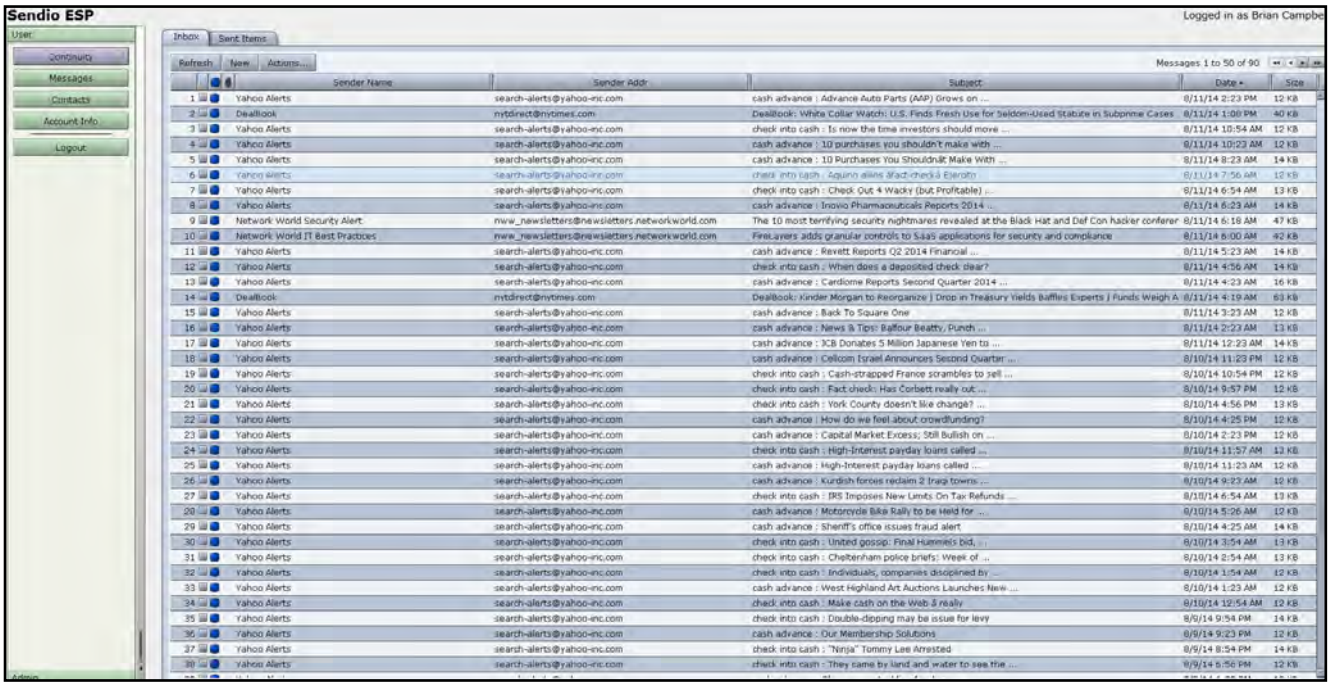


[52] 'Continuity' Button in Navigation Menu

The Continuity Inbox has two tabs (see figure [53]):

- **Inbox** contains messages that were previously delivered, along with new messages that have yet to be delivered. Undelivered messages are held for 28 days, and are then aged-out from the system automatically. Unread messages are indicated by a blue icon next to the message. Double-clicking the message opens the message and removes the blue icon. Buttons are provided for refreshing the contents shown in the tab, creating a new email, and performing Reply, Reply All, Forward, and Delete actions.
- **Sent items** contains all emails the user sends while **Continuity Inbox** is enabled. Disabling Continuity Inbox forwards these emails to the user's Inbox, so the user has a record of emails sent during the mail server outage. A button is provided for refreshing the contents shown.

NOTE: The Sendio mobile interface does not support email continuity. To access the Continuity Inbox, a Flash-enabled web browser is required.



[53] 'Continuity Inbox' for a User Account

When you double-click a message in the **Inbox** or **Sent items** tab, the message opens and the following buttons appear above the body of the email (see figure [54]).

[54] Buttons when Opening a Message in the Continuity Inbox

Reply lets you reply to the sender of the email. Clicking this button adds the person who sent you the message to the **To** field.

Reply All lets you reply to the sender of the email and all other recipients of the email. Clicking this button adds to the **To** field the sender and all of the other people who received the original message.

NOTE: Before you click **Reply All**, consider whether everyone needs to see your reply, especially when the message was sent to a lot of people or distribution lists. It's often better to click Reply, and then add only the people you really want to include. Or, if you decide to click Reply All, remove people who don't need to see your message

Forward forwards the message to one or more individuals you specify. The forwarded message includes any attachments that were included with the original message

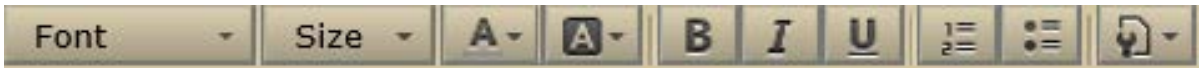
Download downloads the message.

Delete deletes the message.

Close closes the message.

The Continuity Inbox comes with a full-featured editor (see figure [55]). When you type, reply to, or forward an email from the Continuity Inbox, you can use the editor to change the font, color, and style options for your text. Each button in the editor has a tool tip. Moving the pointer over a tool displays a description of the tool's function.

Email sent from the Continuity Inbox contains both a text- and an HTML-formatted body.



[55] Full-featured Editor

APPENDIX A: THE SENDIO ESP PROCESS

The Sendio ESP is a sophisticated state machine that implements a highly configurable workflow engine. A high-level model of the workflow is shown in Figure [1]. The Administrator can configure specific policy and system behavior for each stage in the workflow.

- **Sender Check:** the system does a series of tests using the Domain Name Service (DNS) and other mechanisms to identify and classify the original sender of a message.
- **Recipient Check:** the system verifies that the intended recipients of a message have accounts on the target e-mail server.
- **SilverListing:** the system uses a series of low-level SMTP tests to determine the validity of the sending e-mail server.
- **Anti-Virus / "Malware":** the system scans all messages to ensure that they do not contain viruses, trojans, bots, or other "malware."
- **Anti-Spoofing SPF/DKIM :** in compliance with DomainKeys Identified Mail (DKIM) and Sender Policy Framework (SPF) Internet standards, Sendio will assess the validity of all senders and put any emails from spoofed senders into an Administrator Hold. Users cannot release such messages.
- **IP Reputation:** Sendio's IP address Reputation solution provides a real-time view of high risk IP addresses that are confirmed to be sending spam. Emails flagged for IP Reputation are put into an Administrator Hold. Users cannot release such messages.
- **Spam/Bulk Assessment:** as independent check from IP Reputation, Sendio also flags messages as Spam or Bulk. Such messages have a "B" icon next to them and the "Pending Messages – Show Bulk" view.
- **Corporate Policy:** the system implements policies for handling large messages, those with "untrusted" attachments, or with an excessive number of recipients.
- **Standards Policy:** messages are checked against industry standards for sender authentication, such as DKIM (Domain Key Identified Mail) and SPF.
- **Contacts Check / SAV:** the sender address of each incoming message is checked against both the system contact list and personal contact list of the intended recipient. If a match is found, the system will process the message based on the "action" setting of the matched contact entry (either drop, hold or delivery the message). If a match is not found, a Sender Address Verification Request message will be sent back to the original sender. For more details, see "APPENDIX B: SAV PROCESS" on page 34.

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APPENDIX B: SAV PROCESSES

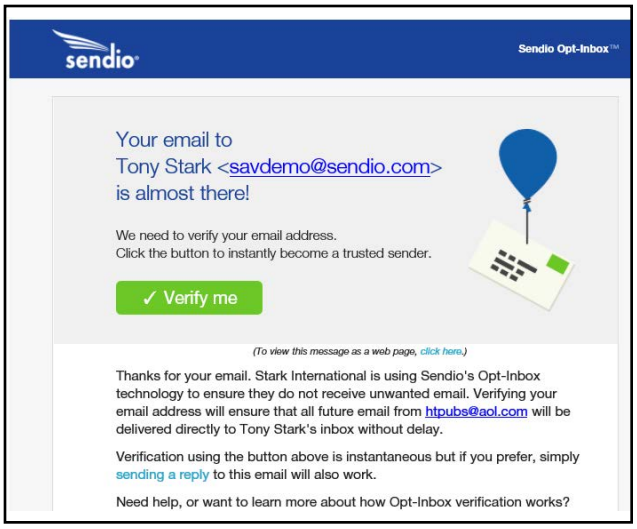
The Sender Address Verification (SAV) process is a simple, low-maintenance process that ensures your *Contact List* is maintained by verifying email senders.

Sendio supports two SAV processes for verifying email senders:

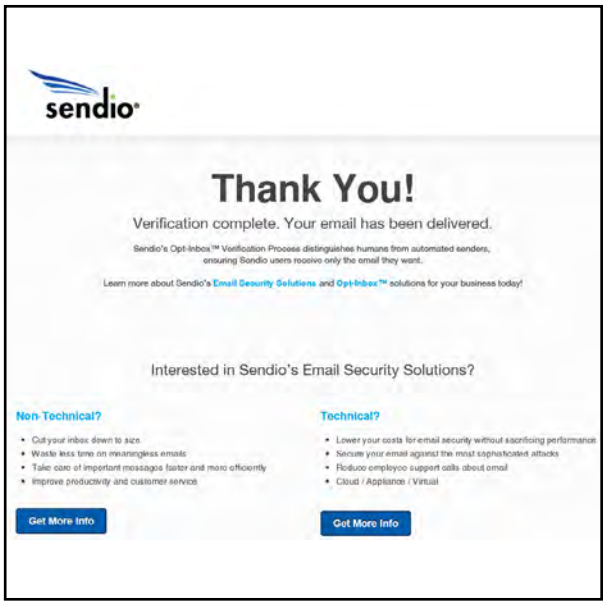
- An HTML-based process, which is the default
- A text-based process

HTML-BASED SAV PROCESS

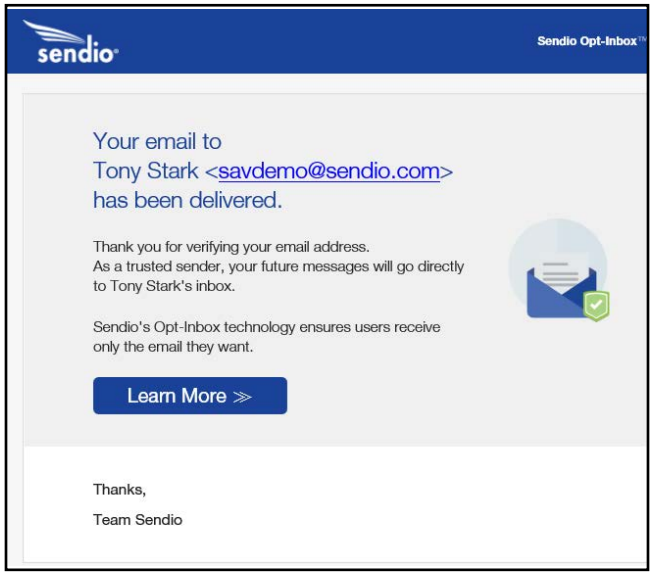
In Figure [56], a sender has sent an e-mail to a User protected by an ESP for the first time. When the sender clicks the **Verify me** button, a browser window opens, with a Thank You message (see figure [57]) and an email is sent to the sender to let him know that his email has been delivered (see figure [58]).



[56] Opening a SAV Message



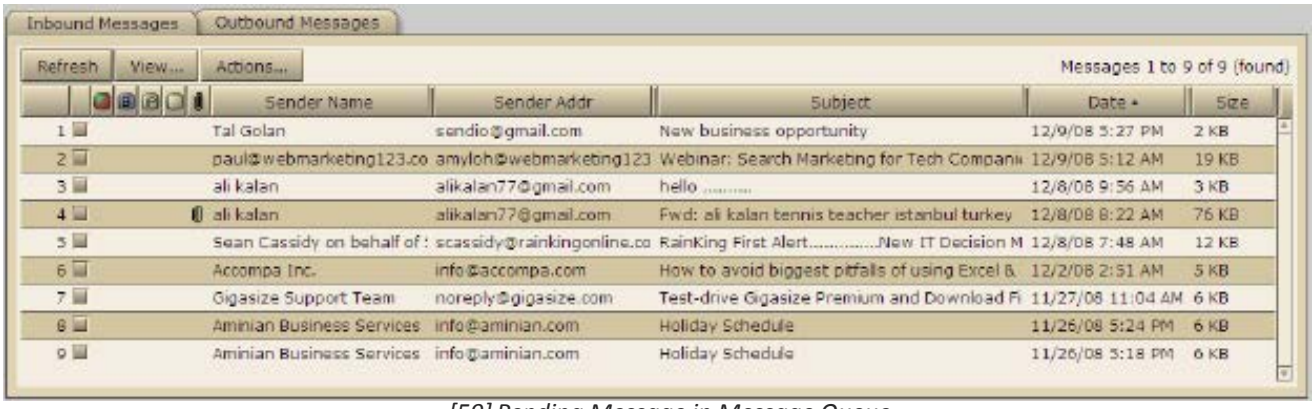
[57] Sample Thank You Message



[58] Sample Email to the Sender

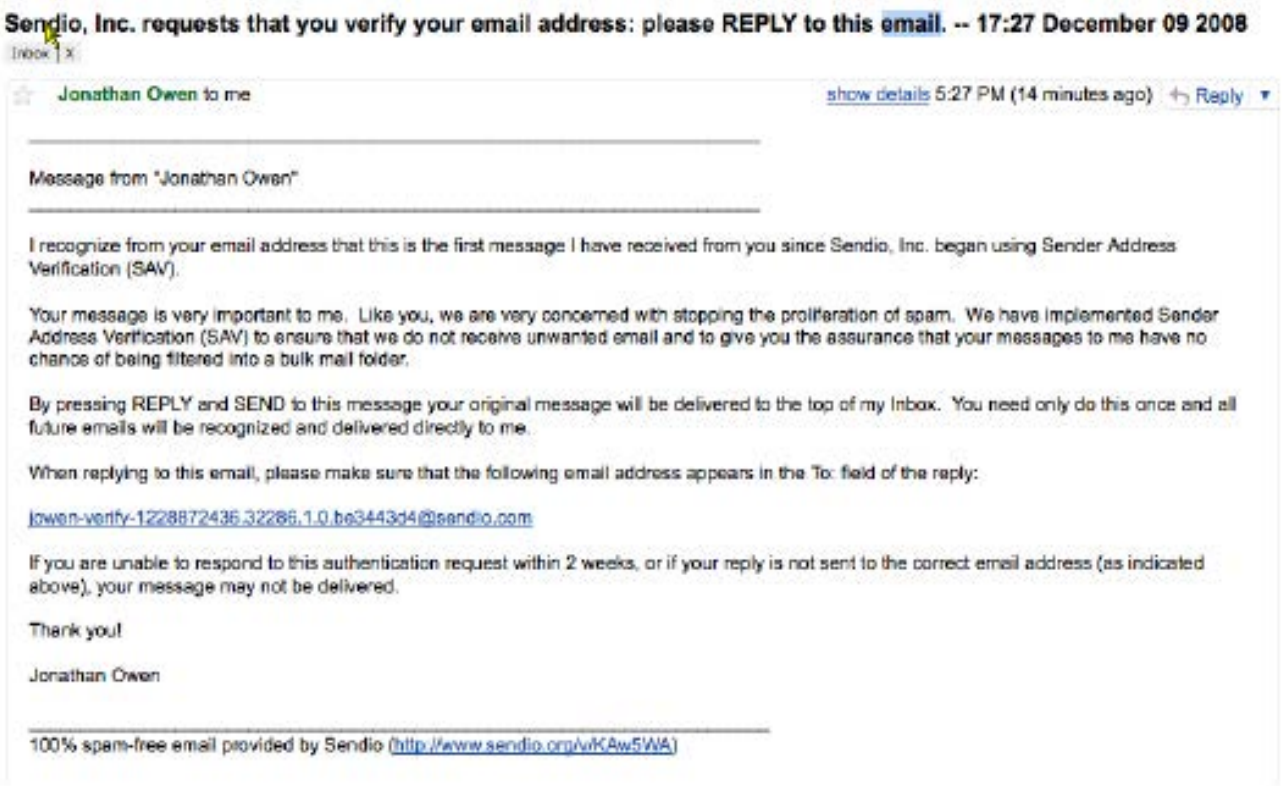
TEXT-BASED SAV PROCESS

In Figure [59], Tal Golan (sendio@gmail.com) has sent an e-mail to a User protected by an ESP for the first time. Tal's name and e-mail address appear in the ESP *Message Queue* as a *Pending* message. The User does not need to take any action.



[59] Pending Message in Message Queue

Tal Golan, sendio@gmail.com, automatically receives the *SAV Request* asking to identify his validity as a sender, shown in Figure [60].



[60] SAV Request Message

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