



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 the Sender Address Verification Process works

## CONVENTIONS IN THIS MANUAL

**N**OTE: A Note is information that deserves special consideration.

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

**W**ARNING: 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*.

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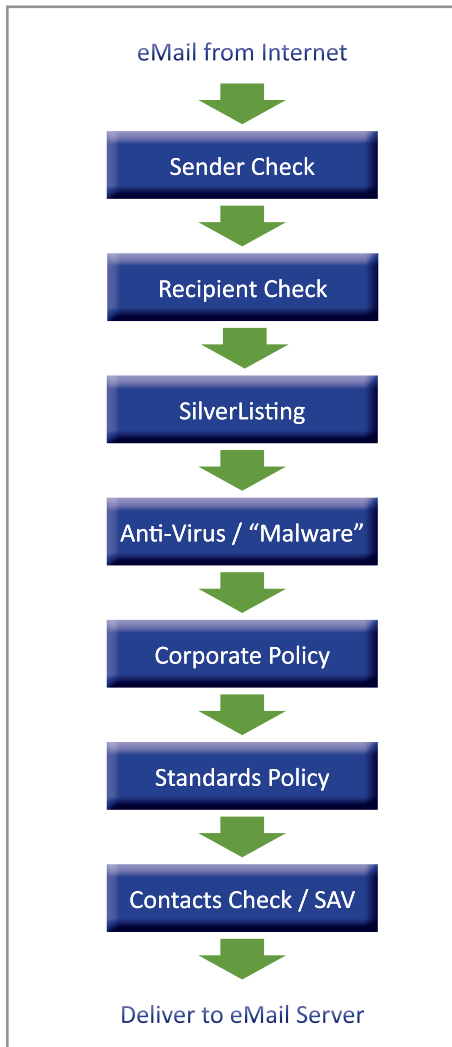
## HOW DOES SENDIO ESP WORK?

The unique capabilities of the Sendio ESP offer to re-establish e-mail as a trusted communications tool by totally eliminating spam and e-mail threats in the enterprise environment. This results in dramatic time savings for users, and for IT staff, and reclaims lost resources for the company. 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.

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 7 layers of validation checking and security on every incoming e-mail message (see figure [1]). Only e-mail transmissions that pass all 7 layers end up being delivered to your inbox. For more information, see Appendix B.

The first 6 steps (starting with "Sender Check") typically block between 95%-99% of spam. While this sounds like much, even 99% is far from being acceptable considered the ever increasing volume of spam that most organizations receive in a single day (e.g. 1% of 100,000 spam messages is still 1,000 pieces of unwanted and potentially harmful e-mail). If you organization has been using a filter-based system that operates by examining e-mail content and attempting to guess what is spam, this problem might be all too familiar.

The final step, "Contacts Check / SAV", is key to eliminating the remaining unwanted messages that manage to pass the first 6 steps. In this step, 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 is matched to a contact entry, the entry's "action" specifies whether messages from the sender should be Dropped, Held or Delivered.



[1] Sendio ESP High-Level Workflow Model

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

If the ESP does not find a match for the sender's address, it will hold the message in your personal *Inbound Message Queue* and send a *Sender Address Verification (SAV)* message to the original sender. The purpose of this measure is to ensure the sender is a real person as opposed to a machine that is generating spam. This auto-generated e-mail includes a unique Reply-To address. When the sender replies to this request (by simply clicking REPLY and SEND) the reply is received by the ESP and as a result two important things occur:

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

This final step is an essential ingredient in restoring trust in e-mail communications. On the one hand it restores the sender's confidence in knowing that their important e-mail will be reliably delivered to the intended recipient. On the other hand, it ensures complete elimination of 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 program and from other sources 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:

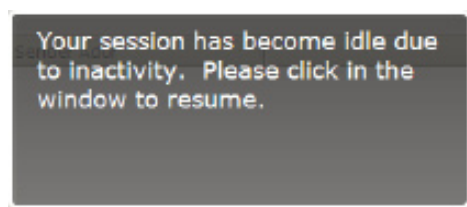
- Microsoft Internet Explorer 5.5 (or better)
- Firefox v1.5 (or better)
- Apple Safari 3 (or better)

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

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



[4] Session Inactivity message

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.

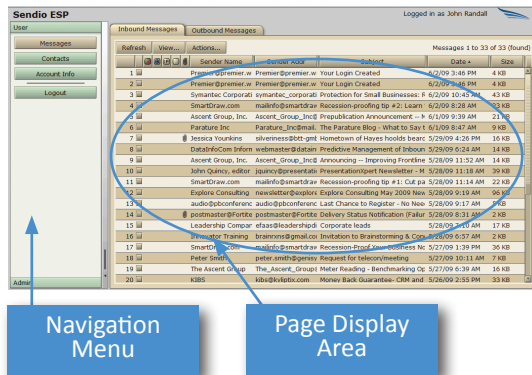
To log in, enter your e-mail address and password, as specified by your administrator. The Sendio ESP can integrate with any compliant Directory Server. If your organization's ESP was set up to take advantage of this feature you will be able to login using the credentials you use to log in to your computer (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 (Figures [4]).

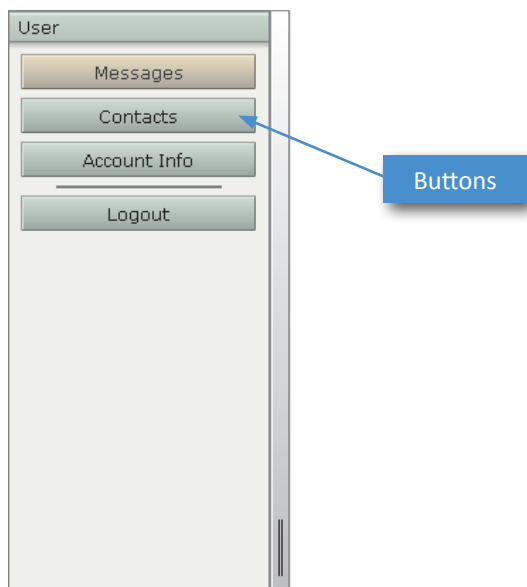
**TROUBLESHOOTING TIP:** In the event that the login fails, ensure that the Caps Lock is not turned on or that you have not changed your e-mail password since the last login.

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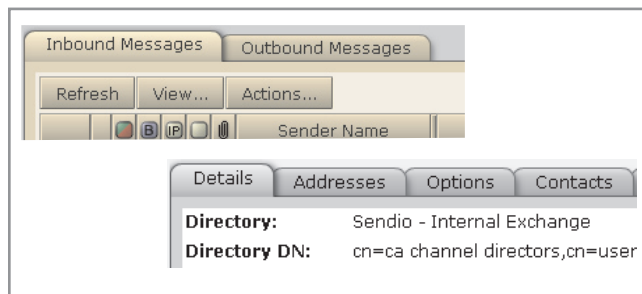
## SECTION 2: USING THE WEB INTERFACE



[6] Web interface Layout



[7] User Navigation Menu



[8] Examples of Pages with Tabs

### 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 [6].

### NAVIGATION MENU

The navigation menu is comprised of navigation buttons as shown in Figure [7]. 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.

### 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 [8].

Pages include various control buttons that modify the display or change information, as shown in Figure [9].



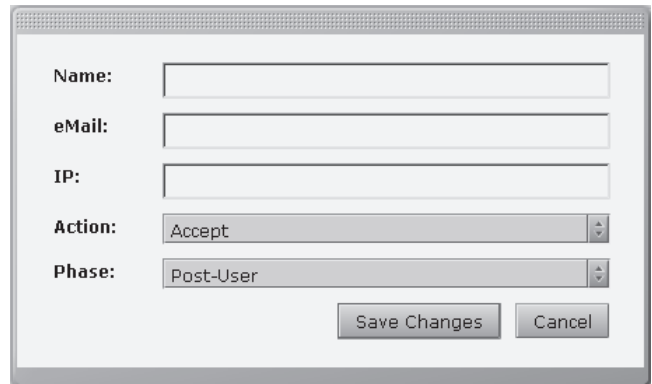
Some control buttons cause additional pages (or “windows”) to “pop up” on top of primary pages, as shown in Figure [10].

[9] Examples of Control Buttons

### TABLE-ORIENTED CONTROLS

Many pages display information in tables, such as the **Inbound Messages** and **Outbound Messages** pages. [11]

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.



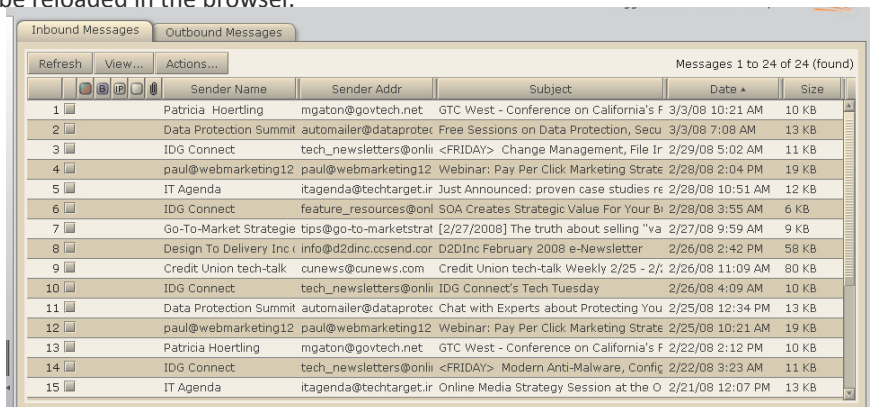
[10] Example Pop-up Window

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

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

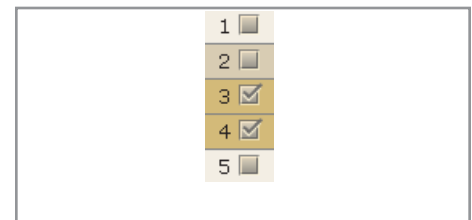
The **View...** button opens either a drop-down list or a pop-up window of alternate criteria for viewing the displayed table.

The **Actions...** button opens a drop-down list of actions that can be performed to modify the information in the table. Specific records can be modified individually or in a batch by “checking” the box(es) next to the record number(s). [12]



[11] Example of a Page Showing a Table

**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.



[12] 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

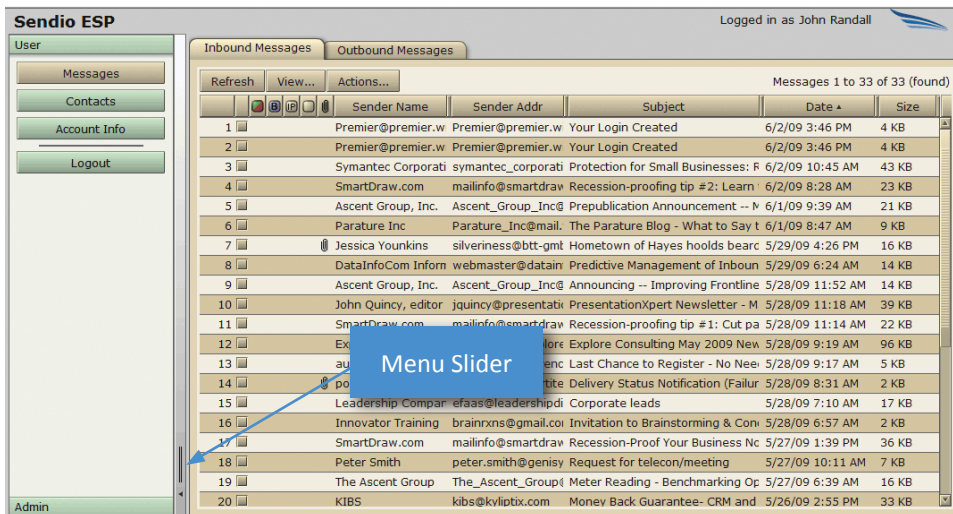
[13] Table Records Sorted by Date

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

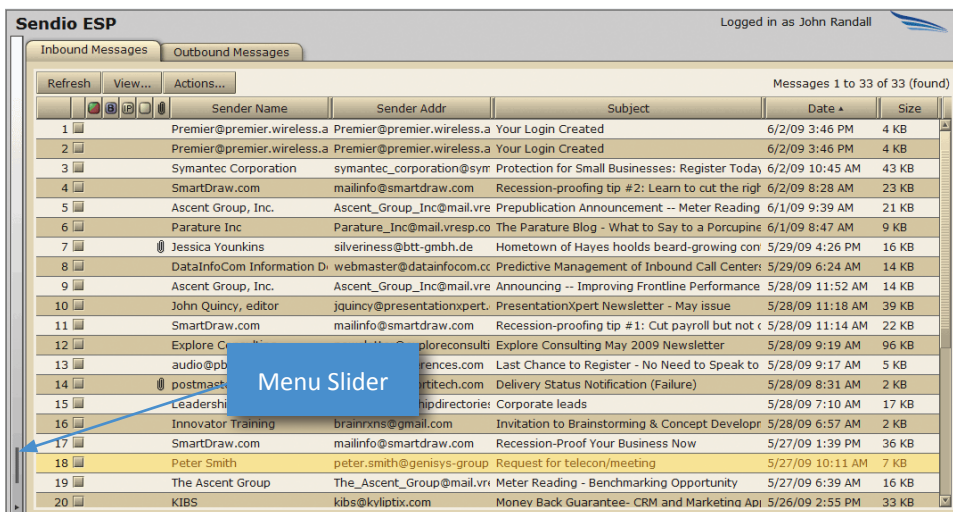
[14] Table Records Sorted by Subject

## 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. [17] [18]



[17] Navigation Menu Open



[18] Navigation Menu Closed

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## SECTION 4: WEB INTERFACE FUNCTIONALITY

### 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:



[19] User Navigation Menu

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.

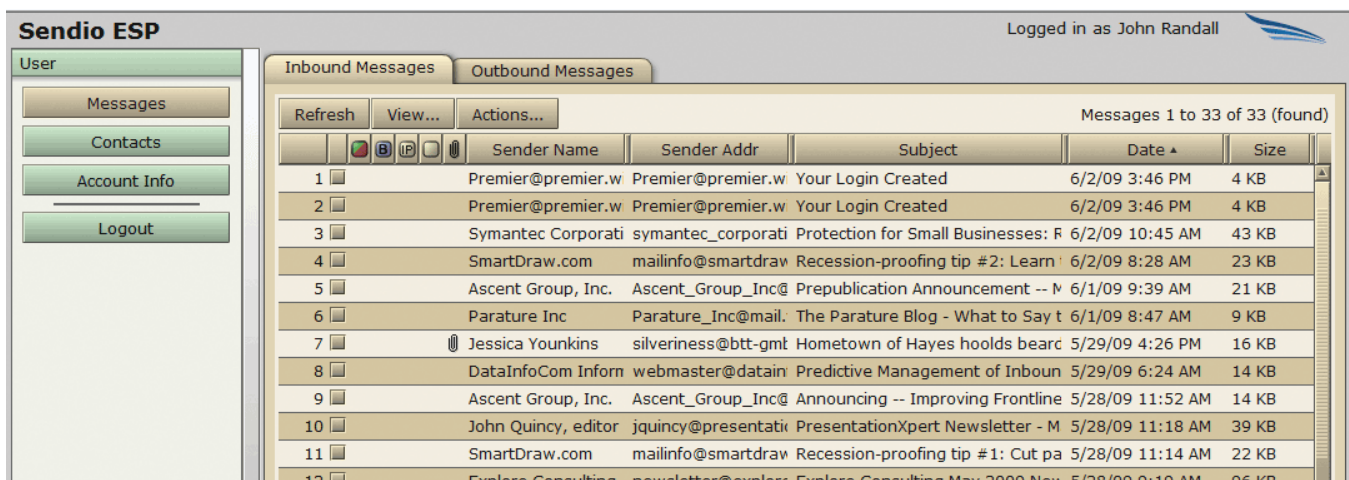
The **Account Info** menu option provides a summary of your Sendio ESP account.

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 [20].



[20] Messages > Inbound Messages Pending Queue

**NOTE:** Your Administrator may have disabled the **Outbound Messages** tab shown in Figure [20].

## 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" ?

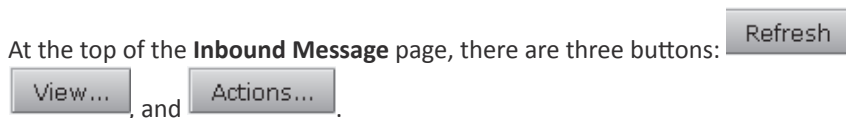
The ESP gives you a way to get different "views" of your queues. For example, you can look at a list of all of the messages sent to you from 'ibm.com'.

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.

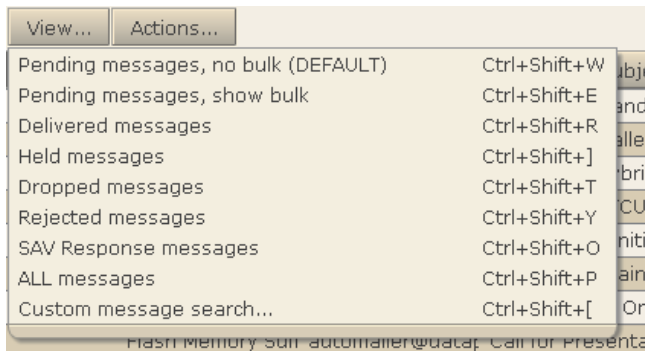
The **Outbound Messages** tab displays messages that have been sent to destinations outside the organization. There is no need to delete messages from these queues as the ESP will delete them automatically after a certain number of days. The number of days that a message is held in queue is determined 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:







[21] Inbound Messages View...  
Button Drop-Down Menu

### Refresh Button

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

### VIEW BUTTON

The **View...** button has several options that make the *Message Queue* easier to manage. To change the view, you select one of the options from the drop-down menu.

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* (refer to *Section x: Contacts* 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 that 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 is enabled.

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*.

[22] Custom Message Search...  
Messages Tab

[23] Custom Message Search...  
Attach Tab

[24] Custom Message Search...  
Bulk Tab

[25] Custom Message Search...  
Virus Tab

[26] Custom Message Search...  
Status Tab

[27] 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 [22]) 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.

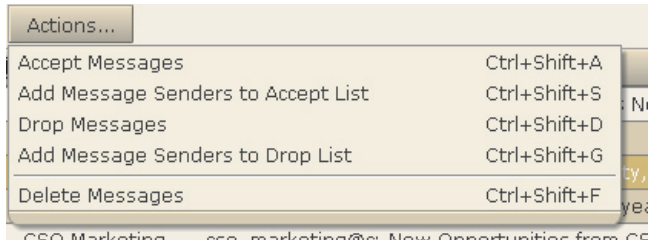
The ESP tracks the status of every message. The **Status** tab allows you to narrow or expand the search to include the status of the messages. Selecting a status will include any messages with a matching status in the search results. There is no limit to the number of categories that can be selected.

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.



[28] 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.

**N**OTE: 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

If you wish 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

If you wish to receive the selected message(s) and all future messages from the same source, choose this option, and the message(s) will be delivered to the top of your inbox and the message source 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. [29]



[29] 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*

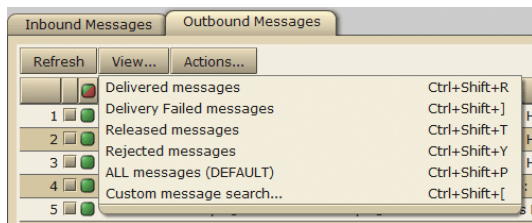
**NOTE:** Do not add *Drop Contacts* to your *Contacts List* unless you are receiving unwanted e-mail from the same sender repeatedly. A high number of *Drop Contacts* lowers system performance.

## Delete Messages

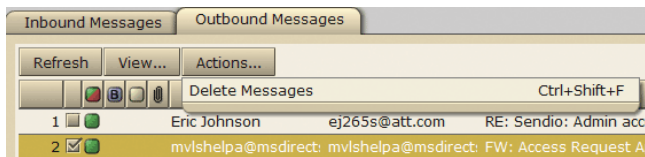
The *Delete Messages* menu option immediately deletes the selected message(s) from your *Message Queue*. Deleted messages are not recoverable.

## CHECKING THE QUEUES

Your *Message Queue* will be self-sufficient once your contacts have been accepted and stabilized into the dynamic *Accept-List*. Check the ESP **Inbound Messages** queue each day until all machine-generated messages that you wish to receive have been 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 source or make an online purchase that sends a receipt via e-mail, you may need to re-check this view to accept the message source.



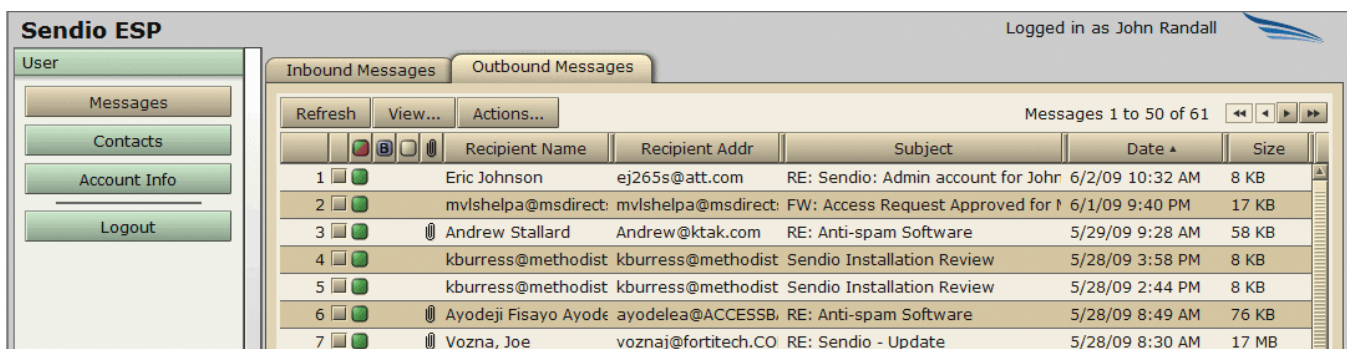
[30] **Outbound Messages View...  
Button Drop-Down Menu**



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

## MESSAGES > OUTBOUND MESSAGES

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





[32] **Outbound Messages Queue**

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

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  and  buttons for **Outbound Messages** provide options that work in a manner similar to those previously described for the **Inbound Messages**. (Figures [30] and [31])



[33] User Navigation Menu


## CONTACTS

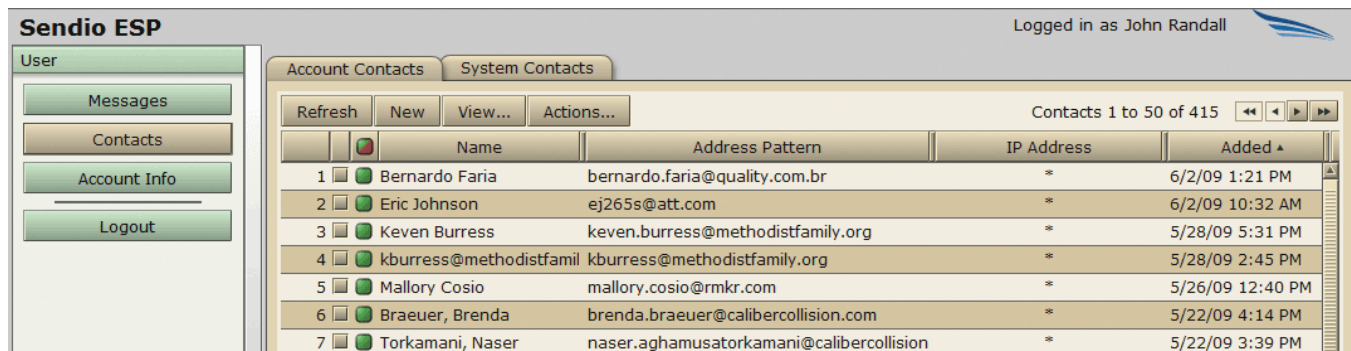
The  button is the second item on the **User** navigation menu.

Selecting this button displays a view of the **Contacts > Account Contacts** page, shown in Figure [34]. This view displays 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.




[34] Contacts > Account Contacts Page

[35] New Contact Pop-up Window

[36] New Contact Action Drop-Down Menu

-  A green icon indicates that the address of this “sender” is on your *Accept-List* and that messages from this sender are to be immediately delivered to the your inbox.
-  A red icon indicates that the address of this “sender” is on your *Drop-List* and that messages from this sender are to be immediately discarded and not delivered.
-  A white/gray icon indicates that the address of this “sender” is on a *Hold-List* and that messages from this sender are to be held in a user’s *Pending Queue*, and either manually released to the inbox or simply allowed to “age out” of the queue.

## CREATING A NEW CONTACT

To enter a new contact, click the  button. The pop-up window shown in Figure [35] 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. [36]

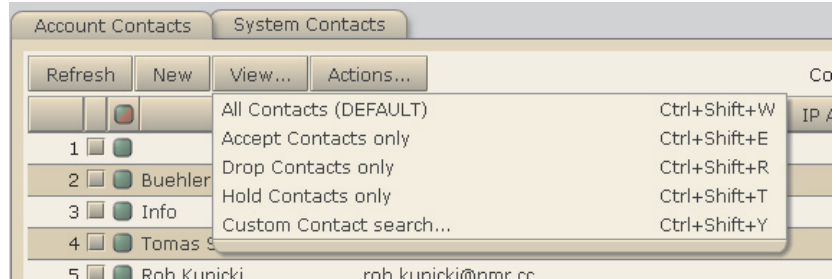
- *Accept* adds the contact to your *Accept-List*
- *Drop* adds the contact to your *Drop-List*
- *Hold* adds the contact to your *Hold-List*

**NOTE:** *Drop-List* contacts should be created *only* in cases where messages are reaching your inboxes from a well-known unwanted source. 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.

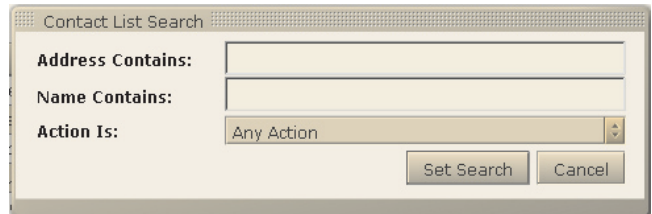


[37] **Contacts > Account Contacts > View... Button Drop-Down Menu**

## 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. [37]

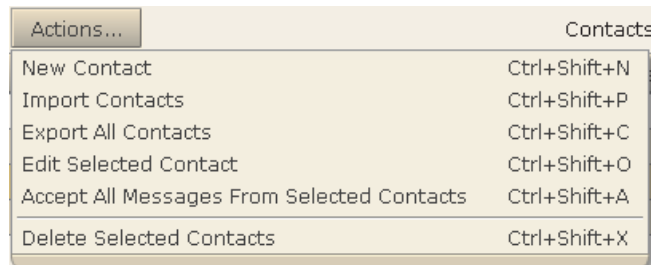


[38] *Custom Contact Search*

## 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.

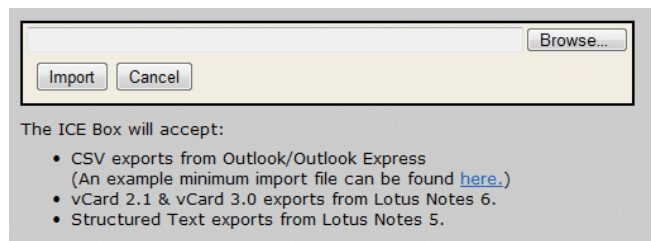


[39] **Contacts > Account Contacts > Actions... Button Drop-Down Menu**

## CONTACTS > ACCOUNT CONTACTS > ACTIONS...

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

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



[40] *Import Contacts Window*



	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

[41] Contact Import CSV File Structure

## IMPORT CONTACTS

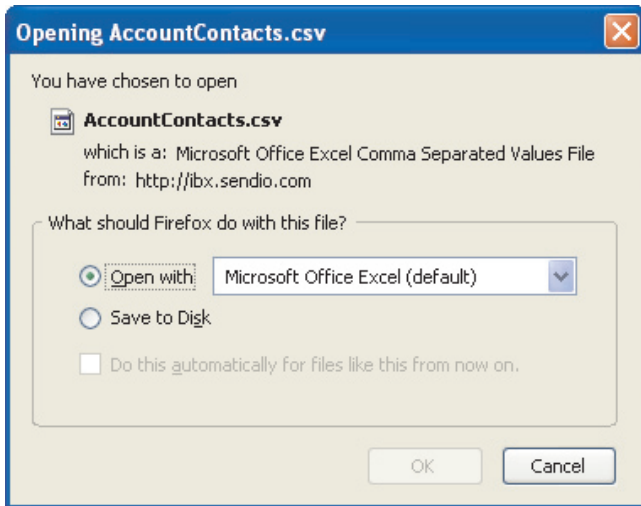
The *Import Contacts* action opens a window, shown in Figure [40], which web interfaces you through the process of importing a set of contacts from an external source. Three formats are supported:

- 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 [41]. 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*.



[42] Export Contacts Dialog

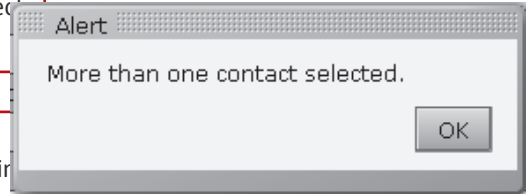
**NOTE:** It may be necessary to disable the pop-up blocker in order for the import process to function properly.

	A	B	C	D	E	F	G
1	Display Name	E-mail Display Name	E-mail Address	ICEBox Action	ICEBox Phase	ICEBox Hits	ICEBox IP Address
2	BH Funds	BH Funds	*@behingerhans.com	accept	post-user	*	
3	ConnectComput	ConnectComputer.com	*@connectcomp.com	accept	post-user	*	
4	Don Valley Toy	Don Valley Toyota	*@dvnlt.com	accept	post-user	*	
5	GreenDimes	GreenDimes	customerservice@	accept	post-user	*	
6	Critical Outage	Critical Outage Test	critical-outage@	accept	pre-user	66.240.238.106	
7	Everyone at JPM	Everyone at JPMorgan	*@jpmorgan.com	accept	pre-user	*	
8			test3@ibm.com	accept	pre-user	*	
9			test@sendio.com	accept	pre-user	*	
10			test2@yahoo.com	accept	pre-user	*	
11	NetSuite Alerts	NetSuite Alerts	*@bounces.netsu.com	accept	pre-user	*	
12	Sendio at Gmail	Sendio at Gmail	sendio@gmail.co	accept	post-user	*	
13	Rim	Rim	*@rim.com	accept	pre-user	*	

[43] Exported Contacts

**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.



[44] Alert Dialog

## EXPORT ALL CONTACTS

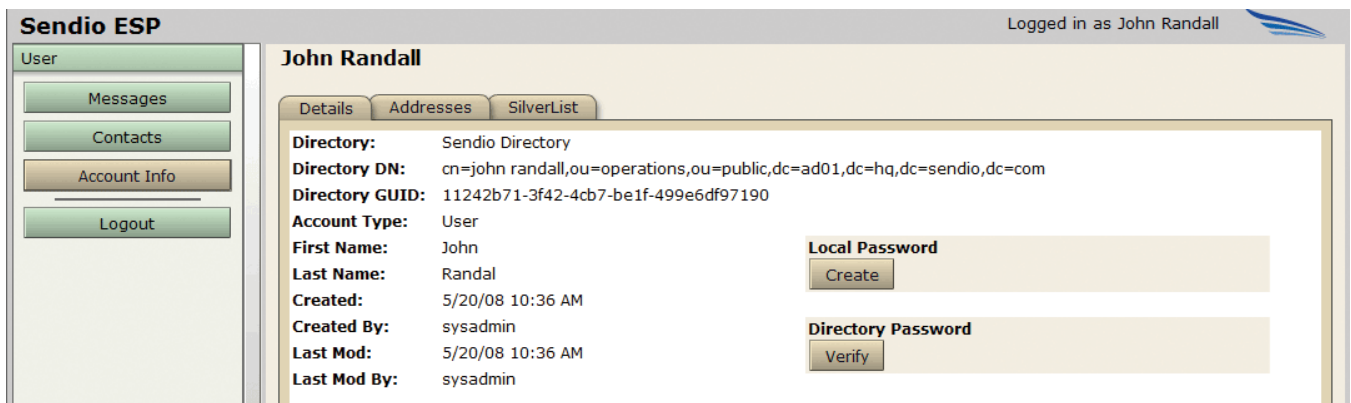
The *Export All Contacts* action executes a process to write all of the contacts to a CSV file, readable by MS Excel and other applications. A dialog box shown in Figure [42] opens, where you specify what to do with the exported file. A portion of an exported file is shown in Figure [43].

## 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 [44].



[45] User Navigation Menu



[46] Account Info Pages

## 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.

## ACCOUNT INFO

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 [46].

### ACCOUNT INFO > DETAILS

The **Account Info > Details** page is the default display, showing a summary of your account information. It contains a summary of account information and access to Local and Directory passwords. Establish a *Local Password* if you would like to enable a third party to access your *Message Queue* 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]


[47] Create Local Password


Creating a local password is necessary only if you wish to delegate access to your *Message Queue*.

The *Directory Password* **Verify** button allows the User to type a password and verify that it matches the password in the directory.

### 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 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.

Address	Domain	Account	Added
1  jrandall@sendio.com	sendio.com	John Randall	5/20/08 10:36 AM

[48] Account Addresses

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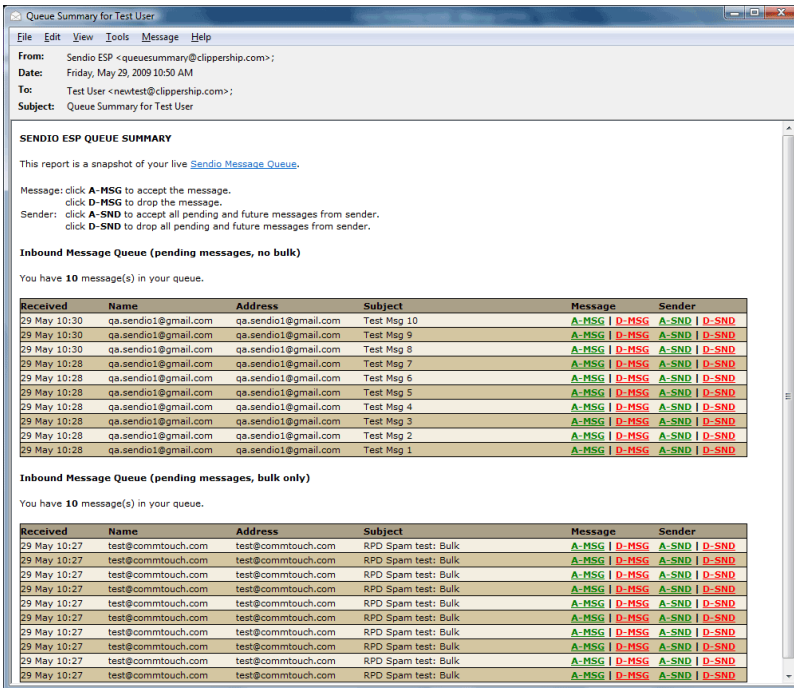
# SECTION 5: QUEUE SUMMARY

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” 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 completely analogous to the functions on the ESP web interface.



[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	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	
29 May 10:27	test@commtouch.com	test@commtouch.com	RPD Spam test: Bulk	<b>A-MSG</b>   <b>D-MSG</b>   <b>A-SND</b>   <b>D-SND</b>	

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

SECTION 5: QUEUE SUMMARY

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# APPENDIX A: THE SENDIO ESP PROCESS

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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”
- **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 (Sender Policy Framework)
- **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 below.

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## APPENDIX B: SAV PROCESS

The Sender Address Verification (SAV) process is a simple, low maintenance process that ensures your *Contact List* is maintained. In Figure [51], 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.

	Sender Name	Sender Addr	Subject	Date	Size
1	Tal Golan	sendio@gmail.com	New business opportunity	12/9/08 5:27 PM	2 KB
2	paul@webmarketing123.co	amyloh@webmarketing123	Webinar: Search Marketing for Tech Compani	12/9/08 5:12 AM	19 KB
3	ali kalan	alikal77@gmail.com	hello .....	12/8/08 9:56 AM	3 KB
4	ali kalan	alikal77@gmail.com	Fwd: ali kalan tennis teacher istanbul turkey	12/8/08 8:22 AM	76 KB
5	Sean Cassidy on behalf of :	scassidy@rainingonline.co	Raining First Alert.....New IT Decision M	12/8/08 7:48 AM	12 KB
6	Accompa Inc.	info@accompa.com	How to avoid biggest pitfalls of using Excel B.	12/2/08 2:51 AM	5 KB
7	Gigasize Support Team	noreply@gigasize.com	Test-drive Gigasize Premium and Download Fi	11/27/08 11:04 AM	6 KB
8	Aminian Business Services	info@aminian.com	Holiday Schedule	11/26/08 5:24 PM	6 KB
9	Aminian Business Services	info@aminian.com	Holiday Schedule	11/26/08 5:18 PM	6 KB

[51] 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 [52].

### Sendio, Inc. requests that you verify your email address: please REPLY to this email. -- 17:27 December 09 2008

Inbox X

☆ Jonathan Owen to me show details 5:27 PM (14 minutes ago) Reply

---

Message from "Jonathan Owen"

I recognize from your email address that this is the first message I have received from you since Sendio, Inc. began using Sender Address Verification (SAV).

Your message is very important to me. Like you, we are very concerned with stopping the proliferation of spam. We have implemented Sender Address Verification (SAV) to ensure that we do not receive unwanted email and to give you the assurance that your messages to me have no chance of being filtered into a bulk mail folder.

By pressing REPLY and SEND to this message your original message will be delivered to the top of my Inbox. You need only do this once and all future emails will be recognized and delivered directly to me.

When replying to this email, please make sure that the following email address appears in the To: field of the reply:

[jowen-verify-1228872436.32286.1.0.bs3443d4@sendio.com](mailto:jowen-verify-1228872436.32286.1.0.bs3443d4@sendio.com)

If you are unable to respond to this authentication request within 2 weeks, or if your reply is not sent to the correct email address (as indicated above), your message may not be delivered.

Thank you!

Jonathan Owen

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100% spam-free email provided by Sendio (<http://www.sendio.org/vKAw5WA>)

[52] SAV Request Message

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**SAVE  
MAIL**

---

**SENDIO, INC.**

**1176 MAIN STREET, SUITE C**

**IRVINE, CA 62614 USA**

**+1.949.274.4375**

**WWW.SENDIO.COM**