



PERSONAL EMAIL MANAGER USER HELP

Websense® Email Security Gateway

v7.7

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Overview

Welcome to Websense TRITON Personal Email Manager! Personal Email Manager is a tool that allows you to manage email that has been blocked by Websense Email Security Gateway. Email Security filters your email to protect you and your organization from viruses, spam, and other undesirable material. Email that triggers an Email Security policy may be delivered, deleted, or blocked and isolated in a message queue, awaiting further action.

Occasionally Email Security may block email that is safe and that you want delivered. Personal Email Manager notifies you of blocked email and provides you the means to manage it, either by permitting the mail delivery or blocking a message from reaching your inbox.

What is Personal Email Manager?

Personal Email Manager performs the following core activities:

- ◆ Sends notification email when 1 or more messages sent to you have been blocked.
- ◆ Allows you to manage your blocked email, either from the notification message or in the Quarantined Messages List.
- ◆ Lets you manage your personal Always Permit and Always Block lists, which allow you to specify email addresses from which email is either always permitted or always blocked.
- ◆ Allows you to manage blocked mail for multiple email accounts in a single Personal Email Manager session.
- ◆ Lets you delegate your blocked message management to another individual.



Note

In all cases, email that fails the Email Security Gateway antivirus scan is blocked. Notifications are not sent for virus-infected messages.

The interactive Personal Email Manager facility provides a convenient means for managing the accumulated blocked inbound email in all your email accounts, as well as maintaining your Always Permit and Always Block lists. Among other Personal Email Manager activities, you can:

- ◆ View a list of all blocked inbound email.
- ◆ Preview blocked email content.
- ◆ Request to receive a blocked email message.
- ◆ Elect to delete all blocked email.
- ◆ Manage addresses in the Always Permit and Always Block lists.
- ◆ View the Personal Email Manager user online Help.
- ◆ Forward a blocked message to another recipient.
- ◆ Designate another individual to manage your blocked email.

Personal Email Manager Help overview

Personal Email Manager online Help covers the following topics:

- ◆ Notification email messages, including their format and available options for managing blocked email (see [Working with Notification Messages](#), page 5)
- ◆ The Quarantined Messages List, including a description of list components and possible message actions (see [Using the Quarantined Messages List](#), page 7)
- ◆ The Always Block and Always Permit lists, including how to add and remove email addresses from the lists (see [Managing the Always Block and Always Permit lists](#), page 10)
- ◆ User account management, including multiple account management and account management delegation options (see [Managing user accounts](#), page 11)

The **Help** button on the Personal Email Manager banner has 2 options for displaying detailed information about using the product.



Important

Default Microsoft Internet Explorer settings may block operation of the Help system. If a security alert appears, select **Allow Blocked Content** to display Help.

If your organization's security standards permit, you can permanently disable the warning message on the Advanced tab of the **Tools > Internet Options** interface. (Check **Allow active content to run in files on My Computer** under Security options.)

Explain This Page opens the Help system to the topic that describes the currently opened Personal Email Manager page and provides any needed operation procedures.

Select **Help Contents** to open the complete Personal Email Manager online Help system. To find a Help topic in the Help viewer, select one of the following tabs:

- ◆ **Contents**
Click a book icon to expand that book.

Click a table of contents entry to display the corresponding topic.

◆ **Index**

Select a letter and scroll through the list. Topics may be indexed with more than 1 entry.

Click an entry to display the corresponding topic or list of multiple topics.

◆ **Search**

Enter a search keyword or phrase and click **Go**.

Click an entry of the results list to display the corresponding topic.

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Working with Notification Messages

At regular intervals, Personal Email Manager sends you a notification email message that itemizes new blocked email. The notification interval is set by your Personal Email Manager administrator.

To review blocked email, open the notification message. This message contains a summary of messages blocked since your last notification, up to the maximum number specified by your administrator. You can perform some operations on your blocked mail directly from the notification message.

The notification message also includes a **Web Access** link to the Personal Email Manager tool, where additional operations are available. See [Working with Quarantined Messages, page 7](#), for more information.

Notification message format

A Personal Email Manager notification message contains a table with the following columns of information about your blocked mail:

- ◆ Sender email address
- ◆ Message subject
- ◆ Date/time of message receipt
- ◆ Possible actions for blocked email

Notification message actions

The Action column includes some operations that can be performed on selected messages. The activities you are allowed to perform in the message depend on how your administrator created your account.

You can perform the following Personal Email Manager operations on blocked email directly from the notification message:

- ◆ Not Spam
- ◆ Deliver

- ◆ Delete
- ◆ Always Block
- ◆ Always Permit



Note

If your administrator does not give you permission to manage your personal Always Block and Always Permit lists, the Always Block and Always Permit options are not available to you.

Not Spam

If you want to report that a message should not be classified as spam, select the message and click **Not Spam**. The message is forwarded to Websense for possible reclassification and delivered to your inbox.

Deliver

If you determine that a message is safe to deliver, select the message and click **Deliver**. The message is released and delivered to your inbox.

Delete

If you determine that a message is likely spam, select the message and click **Delete** to remove the message from your blocked message queue.

Always Block

If you want all future deliveries from a particular email address blocked, select the message in question and click **Always Block** to add the email address.

Always Permit

If you want the delivery of mail from a particular address allowed at all times, select the message and click **Always Permit** to add the email address to the list.

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Working with Quarantined Messages

The Personal Email Manager facility includes 4 main screens in which you can manage blocked email. The Quarantined Messages page lists all blocked messages for a single user account. You can process blocked mail using the various screen operations on this page.

If authorized, you can also manage personal Always Block and Always Permit lists. Mail from an address in the Always Block List is not delivered to your inbox, whereas mail from an address in the Always Permit List bypasses spam filtering and is always delivered. An email address that appears on both the Always Block and Always Permit lists is permitted.

The User Account Access page provides 2 functions:

- ◆ You can delegate the management of your blocked email to another individual.
- ◆ If you have multiple email accounts, you can specify that blocked email from all your email accounts appear in a single Personal Email Manager session. A drop-down list on the screen lets you select which user account to view.

Select the language in which you want Personal Email Manager to display from the **Language** drop-down list.

Logging in

To log into Personal Email Manager, click the **Web Access** link in your notification email. The Personal Email Manager utility opens automatically; no authentication is required.

If you have bookmarked the Personal Email Manager page, open your browser and select the link from your list of Favorites. Log in using your email address.

Using the Quarantined Messages List

The Quarantined Messages List contains all the messages that have been blocked from delivery to your inbox. Messages are sorted by the date received, beginning with the most recently delivered mail.

If you have multiple email accounts, the **View user account** drop-down list lets you select which account you want to see and manage.

In addition to the date/time a message was received, message information in the list includes the sender email address, message subject, message size, and message type (virus, spam, exception, encryption error, or decryption error). Use the **View from/to** fields at the top of the page to specify the date/time range for the log entries you want to see. The calendar includes the following options:

- ◆ Change the month and year by using the back and next arrows around the month and year at the top of the calendar.
- ◆ Set the calendar to the current date by clicking the date in the lower left corner of the calendar.
- ◆ Click **Today** to set the calendar date to today's date.
- ◆ Click **Clean** to clear the current date/time calendar selection.

Set the time range in hours and minutes in the entry fields to the right of the calendar.

You can configure how many messages appear on a page by changing the value in the **View** drop-down list in the upper right area of the screen.

If you want to know which messages you have already opened, click **Read** in the Select field. The check box next to any message you have previously opened is marked. Similarly, if you want to know which messages you have not yet opened, click **Unread** to mark the check boxes next to those messages.

Select an individual message by marking the check box next to that message. Select all messages in the list by marking the check box in the far left table column heading area.

A **Search** function allows you to perform a keyword search on your entire message list. You can also search email senders or subjects.

Selected message actions available on the Quarantined Messages List page include the following:

Action	Description
Deliver	Release the message and deliver it to your inbox.
Delete	Delete the undelivered message from the Quarantined Messages List.
Not Spam	Report that the message should not be classified as spam and release the message for delivery to your inbox. This option is available only when spam messages are selected. The message is also forwarded to Websense for possible reclassification.
More Actions:	
Add to Always Block List	If this option is enabled, add the sender email address to your Always Block List. This option is not available if your administrator has not authorized you to manage your personal Always Block List.

Action	Description
Add to Always Permit List	If this option is enabled, add the sender email address to your Always Permit List. This option is not available if your administrator has not authorized you to manage your personal Always Permit List.
Forward	Forward the selected message or messages to at least 1 other recipient. Enter your recipients, separated by semicolons, in the Forward Message dialog box (up to 319 characters).
Download	Download the message to a desired file location.
Clear all messages	Remove all messages from the Quarantined Messages List.
Refresh	Refresh the message list with the messages quarantined since you opened the list.

Managing quarantined messages

You can view a message in the Quarantined Messages List by clicking the message subject in the Subject column. This opens the message details View Message page for the selected message.

You can click **Back** to return to the Quarantined Messages List at any time. You can also view other messages in the list by clicking **Previous** (to see the previous message in the list) or **Next** (for the next message in the list).

Message details include the following information:

Field	Description
Sender	Sender email address
Recipient	Recipient email address
From	User name associated with the sender email address
To	User name associated with the recipient email address
Date	Date the message is received
Policy	Policy or policies applied to the message
Message type	Identifies the message type (spam, virus, exception, encryption error, or decryption error). This field may be blank if the message type is undefined.
Header	Click Show headers to display the message headers added to the message.
Attachment	File name of any message attachment
Subject	Subject of the message

Message content appears below this message detail information.

Message actions available on the View Message page include the following:

Action	Description
Deliver	Release the message and deliver it to your inbox.
Delete	Delete the undelivered message from the Quarantined Messages List.
Not Spam	Report that the message should not be classified as spam and release the message for delivery to your inbox. This option is available only when the message being viewed is quarantined as spam. The message is also forwarded to Websense for possible reclassification.
More Actions	
Add to Always Block List	If this option is enabled, add the sender email address to your Always Block List. This option is not available if your administrator has not authorized you to manage your personal Always Block List.
Add to Always Permit List	If this option is enabled, add the sender email address to your Always Permit List. This option is not available if your administrator has not authorized you to manage your personal Always Permit List.
Forward	Forward the selected message or messages to at least 1 other recipient. Enter your recipients, separated by semicolons, in the Forward Message dialog box (up to 319 characters).
Download	Download the message to a desired file location.
View Text Format	View the message content in plain text format.
View HTML Format	View the message content in HTML format.

Managing the Always Block and Always Permit lists

If authorized by your administrator, you can manage your personal Always Block and Always Permit lists. A message from an email address in the Always Block List is considered spam and is not delivered to your inbox. Mail from an address in the Always Permit List bypasses antispam filtering on its way to your inbox. Mail from an address that appears in both lists is always permitted.

Adding an Always Block or Always Permit list entry

As mentioned earlier, you can add an email address to either the Always Block or Always Permit list from the notification message or from the Quarantined Messages List. You can also enter the address directly into the Always Block or Always Permit list.

Use the following procedure to add an email address directly to the Always Block or Always Permit List:

1. In the left pane menu, click the **Always Block** or **Always Permit** list, depending on which list you want to modify.
2. Enter the desired address in the **Email address** field.
You may use the asterisk symbol (*) to indicate wildcard entries.
3. Click the arrow to the right of the **Email address** field to add the entry to the Email Address List. A counter indicates the number of addresses in your list.
4. Click **OK** to save your list.

You can perform a keyword search on your list by entering text in the Email Address List search field and clicking **Search**.

Removing an Always Block or Always Permit list entry

Remove an email address from your list by selecting it in the Email Address List and clicking **Remove**.

Managing user accounts

The Personal Email Manager end-user facility provides 2 types of user account management:

- ◆ A user can delegate the management of all blocked email to at least 1 other individual.
- ◆ A user with multiple email accounts can manage blocked email from all those accounts in a single Personal Email Manager session.



Important

These user account functions may not be available to you if they are not enabled by your Personal Email Manager administrator.

Delegating user account management

You can designate at least 1 other individual, or agent, to access and manage your blocked messages in Personal Email Manager. Use the following steps to add a delegated agent:

1. In the left pane menu, click **User Account Access** to open the User Account Access page.
2. Click **Add** in the Account Email Address box to open the Add User Account Access dialog box.
3. Enter the email address of the individual you want to manage your blocked email in the **Access account email address** field.
4. Click **OK**. The email address appears in the Account Email Address box.
5. Repeat steps 2 - 4 to add other delegate accounts as needed.

When any user listed in your Account Email Address list logs in to Personal Email Manager, your email account appears in their Quarantined Messages List **View user account** drop-down list. To manage your blocked email, your delegate selects your account from this list to display your Quarantined Messages List.

Managing multiple user accounts

If you are a Personal Email Manager end user in an LDAP-based user directory, all your email accounts may be automatically available in the Personal Email Manager tool, in the **View user account** drop-down list. Select the account you want to view from this list.

If your accounts are not included in the **View user account** list, you may still be able to manage multiple email accounts in Personal Email Manager by configuring this function manually.

You need to determine which email account to designate as your “primary” user account in order to manage multiple Personal Email Manager accounts. You log in to this account to manage your other user accounts.

After you determine which account is your primary user account, use the following steps to allow that account to manage your other Personal Email Manager user accounts:

1. Log in to Personal Email Manager using an account other than your primary account.
2. In the left pane menu, click **User Account Access** to open the User Account Access page.
3. Click **Add** in the Account Email Address box to open the Add User Account Access dialog box.
4. Enter the email address of your primary user account as the one you want to manage your blocked email in the **Access account email address** field.
5. Click **OK**. The email address for your primary user account appears in the Account Email Address box.
6. Repeat steps 1 - 5 as needed to add the rest of the user accounts that you want your primary account to manage.

After you complete these steps, log in to Personal Email Manager using your primary account. All your user accounts should be listed in the **View user account** drop-down list at the top of the Quarantined Messages page. Select the user account you want to view and manage from this list.

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