



PERSONAL EMAIL MANAGER USER HELP

Websense® TRITON® AP-EMAIL

v8.0.x

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10900 Stonelake Blvd, 3rd Floor, Austin, TX 78759, USA
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The products and/or methods of use described in this document are covered by U.S. Patent Numbers 6,606,659 and 6,947,985 and other patents pending.

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Overview

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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 TRITON AP-EMAIL. The email security software analyzes your email to protect you and your organization from viruses, spam, and other threats. Email that triggers a policy may be delivered, deleted, or blocked and isolated in a message queue, awaiting further action.

Occasionally blocked email may actually be safe to deliver. 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?

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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 alias accounts.
- ◆ Lets you delegate your blocked message management to another individual.

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.
- ◆ View blocked email content.
- ◆ Request to receive 1 or more blocked email messages.

- ◆ Elect to delete 1 or more blocked email messages.
- ◆ Manage addresses in the Always Permit and Always Block lists.
- ◆ View the Personal Email Manager user online Help.
- ◆ Forward 1 or more blocked messages to another recipient.
- ◆ Designate another individual to manage your blocked email.

Your ability to perform some of these actions may depend on the permissions granted by your Personal Email Manager administrator. For example, you may not be allowed to have a quarantined message delivered to your inbox or to add an email address to your Always Permit List. Contact your administrator for more information about these permissions.

Personal Email Manager Help overview

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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 11)
- ◆ User account management, including account management delegation options (see [Managing user accounts](#), page 12)

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 embedded 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.

About Personal Email Manager displays product build information.

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Working with Notification Messages

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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 configured your notification message.

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

Your administrator may not give you permission to perform one or more of these actions. Any action you are not allowed to perform is not available in the notification. Contact your Personal Email Manager administrator for information about your permissions level.

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 from the quarantine queue.

Depending on how your Personal Email Manager administrator configured your quarantined message delivery options, the email may either be:

- ◆ Delivered directly to your inbox, or
- ◆ Returned to message processing for analysis by all subsequent filters. The message may not be delivered if it triggers another filter and is dropped.

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

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The Personal Email Manager facility includes 4 main screens in which you can manage your account. The Quarantined Messages page lists all blocked messages for your 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, URL analysis, and commercial bulk email analysis and is always delivered. When an email address appears on both the Always Block and Always Permit lists, the Always Permit List takes precedence.

The User Account Access page lets you delegate the management of your blocked email to another individual.

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

The time zone for your Personal Email Manager appliance appears to the left of the Language drop-down list.

Logging in

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To log into Personal Email Manager, click the **Web Access** link in your notification email. 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

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

If you are allowed to manage another user's email account, the **View user account** drop-down list includes your primary email address account and any accounts to which you have been delegated access. Select the email account you want to display and manage in this list. Blocked messages from your alias accounts are displayed when you select your primary email account. The drop-down list does not appear if you are not allowed to manage another user's account.

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, commercial bulk, exception commercial bulk, phishing, encryption error, or decryption error). Message information also includes 1 of the following reasons a message is quarantined:

Column Entry	Quarantine Triggered by
AV	Antivirus filter
HYBRID	Email hybrid service
ASA_URL	URL analysis filter
ASA_BATV_SPAM	Bounce address tag validation
ASA_DFP	Digital fingerprinting antispam tool
ASA_LEXIRULES	LexiRules antispam tool
ASA_HEURISTICS	Heuristics antispam tool
Commercial Bulk	Commercial bulk email filter
Content Guardian	Custom content filter
Block List	Personal Email Manager Always Block List entry
Archive	Archive feature
Exception	Message exception

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 may include the following:

Action	Description
Deliver	Release the message from the quarantine queue. Depending on how your Personal Email Manager administrator configured your quarantined message delivery options, the message may either be: <ul style="list-style-type: none"> Delivered directly to your inbox, or Returned to message processing for analysis by all subsequent filters. The message may not be delivered if it triggers another filter and is dropped.
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 in the Quarantined Messages List. The message is also forwarded to Websense for possible reclassification.
Refresh	Refresh the message list with the messages quarantined since you opened the list. You can also click Refresh to fill the Quarantined Messages List page to its maximum configured size. Perform this action if you have removed some messages from the current page (via Deliver, Delete, or Not Spam operations) and you have more than 1 page of quarantined messages.
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.

Action	Description
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.

Your administrator may not give you permission to perform one or more of these actions. Any action you are not allowed to perform is not available on the Quarantined Messages List page. Contact your Personal Email Manager administrator for information about your permissions level.

Managing quarantined messages

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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, commercial bulk, exception commercial bulk, phishing 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 may include the following, depending on the permissions granted by your Personal Email Manager administrator:

Action	Description
Deliver	Release the message from the quarantine queue. The message may either be: <ul style="list-style-type: none"> Delivered directly to your inbox, or Returned to message processing for analysis by all subsequent filters. The message may not be delivered if it triggers another filter and is dropped.
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

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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 spam, URL, and commercial bulk email analysis 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

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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.



Important

This user account function may not be available to you if it is not enabled for you by your Personal Email Manager administrator.
