WEBSENSE®

Email Security

Administrator's Guide

Personal Email Manager

v2.0

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1 | Introduction

Personal Email Manager is an optional component of Websense® Email Security.

Personal Email Manager notifies users that they have blocked inbound or outbound email. It also includes a facility for users to manage their blocked email. The end-user facility is described in *Personal Email Manager User Help*.

Personal Email Manager also has a configuration and administration facility.

This *Personal Email Manager Administrator's Guide* describes how to:

- Set up queues for Personal Email Manager
- Configure notification email messages
- Manage end-user accounts
- Set up and manage administration accounts

Related topics:

- *Setting up or editing queues*, page 12
- *Editing inbound notification email*, page 20
- *Editing outbound notification email*, page 24
- *Editing review notification email*, page 26
- *Setting general options*, page 29
- *Setting up administrators*, page 31
- *Modifying a user's settings*, page 32
- *Banner icons*, page 34
- *The My Junk Email page*, page 34

SSL certificate management

The management of Secure Sockets Layer (SSL) certificates is performed with the Personal Email Manager Configuration Tool. For details, see the Configuration Tool online Help. Click **Start > Programs > Personal Email Manager > Documentation > Configuration Tool Guide**.

Why do I need an SSL certificate?

When a client attempts to access Personal Email Manager using HTTPS, the server sends a digital security certificate to the browser. This enables secure, encrypted communication.

Personal Email Manager comes with a self-signed Secure Socket Layer (SSL) certificate that expires 90 days after installation. The certificate is created during installation. When the certificate expires, a Security Alert is displayed at the start of every session. The second item in the alert is:

```
"The security certificate has expired or is not yet valid."
```

HTTPS communications continues to be secure, but the Security Alert is confusing and undesirable. To avoid triggering the Security Alert, you can:

◆ Obtain a valid, signed digital certificate from a Certificate Authority (CA).

   If you have a CA server, use it to validate the server and Virtual Private Network (VPN) certificates within your network.

◆ Create and install a self-signed certificate. Such a certificate requires regular renewal, usually annually.

See the Personal Email Manager Configuration Tool online Help for more information.

Online Help

Select the **Help** option within the program to display 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.)

Technical Support

Technical information about Websense products is available online 24 hours a day, including:

◆ latest release information
◆ searchable Websense Knowledge Base
◆ show-me tutorials
◆ product documents
◆ tips
◆ in-depth technical papers

Access support on the Web site at:

www.websense.com/SupportPortal/

For additional questions, fill out the online support form at:

www.websense.com/SupportPortal/Contact.aspx

If your issue is urgent, please call one of the offices listed below. You will be routed to the first available technician, who will gladly assist you.

Location	Contact information
North America	+1 858-458-2940
France	Contact your Websense Reseller. If you cannot locate your Reseller: +33 1573 232 27
Germany	Contact your Websense Reseller. If you cannot locate your Reseller: +49 6951 709 347
UK	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Rest of Europe	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Middle East	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Africa	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Australia/NZ	Contact your Websense Reseller. If you cannot locate your Reseller: 1-800-881-011, Access Code 800-542-8609
Asia	Contact your Websense Reseller. If you cannot locate your Reseller: +86 (10) 5884-4200
Latin America and Caribbean	Contact your Websense Reseller.

For telephone requests, please have ready:

- Websense subscription key
- Access to Websense Email Security and its components
- Familiarity with your network's architecture, or access to a specialist
- Specifications of machines running Websense Email Security and its components

To display the version number of the Personal Email Manager release installed on your system, open the Windows **Add or Remove Programs** application and click on the entry for Personal Email Manager. Click the link for support information.

2 Configuring Personal Email Manager

Personal Email Manager must be configured to deliver the desired behavior and performance.

To configure Personal Email Manager:

◆ Set up email filter queues for Personal Email Manager access. See *Setting up or editing queues*, page 12.

◆ Customize the notification email messages that inform users of blocked email. See:

  ■ *Editing inbound notification email*, page 20.

  ■ *Editing outbound notification email*, page 24.

  ■ *Editing review notification email*, page 26.

In addition, you can:

◆ Set general options. See *Setting general options*, page 29.

◆ Manage Personal Email Manager administrator and end-user accounts. See:

  ■ *Setting up administrators*, page 31.

  ■ *Modifying a user's settings*, page 32.

To become familiar with how end-users manage their blocked email, see *The My Junk Email page*, page 34.

> ✔ **Note**
> Within Personal Email Manager, click the Help button to access context-sensitive Help.
>

Administration accounts

Personal Email Manager comes with a pre-defined administration account named PEMAdmin. You can also create additional administration accounts.

◆ **PEMAdmin** is the default administrator account. It cannot be deleted. You must use this account when you log into Personal Email Manager for the first time. If required, this can be the sole administration account.

◆ *Administrator* accounts are created by PEMAdmin or another administrator. In this way, multiple administrators can manage queues, set up and manage notification email, and manage user access.

To set up administration accounts, see *Setting up administrators*, page 31.

> ✔ **Note**
> Administrators must use a browser that has JavaScript enabled. The administration screens require it.

Opening Personal Email Manager

Launch Personal Email Manager in either of 2 ways:

◆ Select **Start > Programs > Personal Email Manager > Administrator**

◆ Click the link to Personal Email Manager in an inbound notification email.

To perform administration tasks, you must log in as PEMAdmin or have administrator privileges.

The Login screen

The name you use to log in depends on whether Personal Email Manager is integrated with an LDAP (directory) server. This is determined when Personal Email Manager is installed.

If Personal Email Manager connects to an LDAP server, you and other Personal Email Manager users log in using your Windows user name and password. The user name field is labeled: **Windows User Name**

If Personal Email Manager is *not* integrated with an LDAP server, you and other users log in using your domain email address (see, *Log in using email address*, page 11.) The user name field is labeled: **Email Address**

To log in as PEMAdmin, enter that name and its password.

Your login name is filled in automatically if you have clicked the link to Personal Email Manager in an inbound notification email.

✔ **Note**
Login sessions automatically expire after 20 minutes. If your session expires, you are returned to the Login screen.

Log in using email address

On Personal Email Manager systems that do not use a directory server, log in using your email address. Your email address is displayed automatically if you click the link to Personal Email Manager in an inbound notification email.

The first time you log in, you must click **Send me a new password** to create an account and password. On the page that's displayed, enter your email address and click **Send new password**. The password is sent to your email address.

To change your password to something you prefer, see *Changing passwords*, page 33.

If You Forget Your Password

You can reset your password any time by clicking **Send me a new password**.

Configuration page

The Personal Email Manager interface is displayed in the default browser. The main screen has 2 tabbed pages: **Configuration** and **My Junk Email**. If you are logged in as PEMAdmin, only the Configuration tab is displayed.

The Configuration page includes a table of queues available to Personal Email Manager. The table includes links to queue configuration screens.

The Configuration page also includes links that allow you to:

- ◆ Set up templates for email notifications
- ◆ Modify general options
- ◆ Set up other administrators
- ◆ Log in as another user and modify that user's settings
- ◆ Refresh the directory information used by Personal Email Manager

The other tab on the main screen is the **My Junk Email** page. This page allows you to manage your personal blocked email. This is the default page if you clicked the link to Personal Email Manager in an inbound notification email. This is the only page that

end-users see. This page is not displayed if you are logged in as PEMAdmin. For details on managing personal blocked email, see *Personal Email Manager User Help*.

Related topics:

Setting up or editing queues

To set up or edit a queue, use the links in the **Action** column of the **Configuration** page.

In the queue list:

◆ **Set up** is displayed if the queue has not been configured for use with Personal Email Manager.

◆ **Edit** is displayed if the queue is configured for use with Personal Email Manager.

Queues that have been configured for use with Personal Email Manager cannot be returned to the uninitialized state, but they can be deactivated from Personal Email Manager processing.

Click a link to open the **Configure Queue - <queue name>** page.

Configuring queue options

> ⚠️ **Warning**
>
> Do not enable Personal Email Manager on a queue that could compromise network security or that might contain viruses. If users are allowed to release blocked email from such a queue, users and your network are not protected against this dangerous material.

The default options are selected automatically when configuring a queue for the first time.

Option	Default status	Description
Activate Personal Email Manager on this queue for:		
Inbound email	Default	Personal Email Manager processes inbound email in this queue.
Notify users of blocked inbound email immediately		For this queue, this option overrides the global notification timing settings selected on the Inbound Notification Email Timing page. Enable this option if this queue handles time-critical email that requires immediate notification. For more about the global settings, see *Setting the timing of inbound notification email*, page 22.
Outbound email		Personal Email Manager processes outbound email in this queue.
Allow users to release blocked email:		
Directly by users	Default	Users are allowed to release their blocked email. Users can preview their blocked email.
Activate Always Allowed processing for inbound email on this queue	Default	Email from addresses in the user's Always Allowed list are not blocked for this queue. When this option is selected, an email from an always allowed address is sent on to the user's Inbox even if it would have otherwise been isolated in this queue.

Option	Default status	Description
Subject to manual review		Users cannot release their blocked email. Instead, the email is sent to 1 or more reviewers for action.
		Users cannot preview their blocked email.
		The advantage of this option is that the user has to make a judgement call as to whether the email is worth highlighting for special treatment. This reminds the user of the need for appropriate email usage.
Keep copies of released email	Default	A copy of the released email is stored in the selected audit queue. This includes email that is released by the user or that passes through the Always Allowed list.
		Note: Email sent for manual review and subsequently released is not copied to the audit queue.
		When Personal Email Manager is installed, a default audit queue is created. See the *Personal Email Manager Installation Guide* for details.
		An audit queue is used, for example, to prove that a user has breached your organization's Acceptable Use Policy (AUP). This processing relates exclusively to Personal Email Manager.
Advanced options		
Allow users to manage their own email	Default	
All users	Default	
Selected users (LDAP directory integrated systems)		You can restrict the management of blocked email to specific users, groups or organizational units (OUs). To add or edit the list, click **Edit selected user list**. The Selected Users for Queue - <queue name> page opens. See *Selecting users*, page 17.
Selected email addresses (non-LDAP systems)		Enter email addresses separated by a comma, semicolon or line feed, or paste addresses from the clipboard.
All except selected users (LDAP directory integrated systems)		You can specify users, groups or organizational units (OUs) that are *not* allowed to manage blocked email. To add or edit the list, click **Edit selected user list**. The Selected Users for Queue - <queue name> page opens. See *Selecting users*, page 17.

Option	Default status	Description
All except selected email addresses (non-LDAP systems)		Enter email addresses separated by a comma, semicolon or line feed, or paste addresses from the clipboard.
Set up domain managers to manage users' email, per domain		For this queue, you can set up Domain Managers who are responsible for managing the blocked inbound and outbound email of all the users in their domain.
		Domain Managers are well suited to organizations that use structured domain paths, such as universities or government departments.
		Add domain – See *Adding a managed domain*, page 18.
		Edit domain – See *Editing a managed domain*, page 20.

Configuring queues - recommendations

It is recommended that you initially set up *only* the Anti-Spam Agent queue. This is the queue that is likely to contain incorrectly identified spam (false positives) that requires management by users.

The following table shows recommended settings for other queues that could be part of a typical setup. Configuration is not limited to these queues.

✓ **Note**

It is recommended that you *not* enable queue management for **Anti-Spam Agent - DFP**. The DFP queue contains 100% spam email. There is no need for manual management of this email.

Email queue	Inbound/Outbound	Users
Anti-Spam Agent	Inbound	All users
Virtual Image Agent	Inbound + Outbound	Selected users
Confidential*	Outbound	Selected users

*To set up the Confidential queue, you must first have trained the Virtual Learning Agent (VLA). See the VLA chapter in the *Websense Email Security Administrator's Guide* for details and a tutorial example.

Selecting users

The ability to select users from a list is available only when Personal Email Manager is configured to use 1 or more LDAP directories (such as Active Directory). On such systems, you can search for and select users, groups and organizational units (OUs) in the directories that are integrated with Personal Email Manager.

> ✓ **Note**
>
> To add or remove directories, use the Personal Email Manager Configuration Tool (**Start > Programs > Personal Email Manager > Configuration Tool**).

Currently selected users, groups and OUs are listed in the right-hand field. Selecting an entry causes its details to be displayed below the list.

Click **Apply** to apply changes and continue working.

Click **OK** to apply changes and return to the Queue Configuration screen.

Searches

Searches return the names that match the string. Substrings (partial names) match names containing the string. For example, "sales" will match "GlobalSales" and "SalesForce".

Search results are ordered by type: OUs, Groups, Users, and then alphabetically within the type.

Adding a managed domain

A managed domain is a domain, such as mycompany.com or sales.mycompany.com, that you have identified to Personal Email Manager and that has 1 or more designated managers who manage blocked email for all members of that domain.

The designated managers can see other users' blocked email and release it. Domain managers are responsible for all email addresses in their domain. They receive email notifications for all blocked email in the queue for that domain and manage the blocked email through the My Junk Email page.

You can specify multiple managed domains for a queue, and also assign multiple domain managers. For an example, see *How domain managers are used - example*, page 19.

To add a managed domain:

1. In the **Domain:** field, enter a domain or valid subdomain from the **Protected Domains** list.

2. Enter the email addresses of the domain's managers, separated by a comma, semicolon or line feed, or paste addresses from the clipboard.

3. Click **OK** to finish.

Protected Domains are domains for which Websense Email Security filters email. See the *Websense Email Security Administrator's Guide* for details.

Related topics:

◆ *Setting up or editing queues*, page 12

◆ *Selecting users*, page 17

◆ *Editing a managed domain*, page 20

◆ *The My Junk Email page*, page 34

◆ *Configuration page*, page 11

How domain managers are used - example

An email filter queue has been set up for Personal Email Manager with the following managed domains and domain managers.

Managed Domain	Domain Managers
company.com	manager@company.com admin@company.com
uk.company.com	manager@company.com teamlead@uk.company.com

An inbound email to multiple recipients in multiple domains is blocked in an email filter queue that has been set up for Personal Email Manager. The email recipients are:

recipient1@company.com

recipient2@company.com

recipient3@uk.company.com

Therefore, the domain managers receive the following notifications:

◆ **manager@company.com** – Receives a combined notification for:
recipient1@company.com
recipient2@company.com
recipient3@uk.company.com

◆ **admin@company.com** – Receives a combined notification for:
recipient1@company.com
recipient2@company.com

◆ **teamlead@uk.company.com** – Receives a notification for:
recipient3@uk.company.com

Related topics:

Editing a managed domain

To change the managers of managed domains, enter email addresses separated by a comma, semicolon or line feed, or paste addresses from the clipboard. Click **OK** to accept the changes.

Related topics:

Editing inbound notification email

Configuration page > **Tasks** panel > **Edit inbound notification email**

An inbound notification email template is supplied with Personal Email Manager. It is recommended that you customize it for your organization.

The template is used for:

◆ HTML notifications – For email clients that support HTML.

◆ Plain text notifications – Used by text-based email clients, such as Blackberry® devices. (Full support for this type of device requires a connection to an IMAP server. See the *Configuration Tool* guide for details.)

Previews of both notification types are displayed below the template.

To review the appearance of the notification, click **Refresh previews**. This updates the previews with your latest changes. It does *not* cause the changes to be saved.

You can also send a test email to experiment with and validate your settings in the actual output. Sending a test email does *not* cause the changes to be saved.

Note

If you send a test email when you are logged in as PEMAdmin, you will be prompted for an address to send the test email to.

Notification Email Fields

Introduction – This text is inserted at the top of the notification. It is recommended that you keep the message short, but explain clearly why the notification has been sent. You may also insert a date-time token that automatically inserts the date and time that the last notification was sent to that user.

If Websense Email Security Auto Queue Management (AQM) is enabled on 1 or more queues monitored by Personal Email Manager, the blocked notification email may include a dynamically generated line that indicates the approximate number of days until the email is automatically deleted. In the previews above, the line reads, "These emails will be deleted in approximately 14 days." What this line will actually say is determined as follows:

◆ If all email in the notification comes from queues with the same auto delete setting, the line states that the email will be deleted in approximately *n* days.

◆ If the email is from a mixture of queues with different auto delete settings, the line states that the email may be deleted at some unspecified time in the future.

◆ If any of the email is from a queue with no auto delete setting, no line is included.

Your company logo – Inclusion of a logo is common to all HTML notifications. Include your logo to ensure that users understand that the notification is coming from your organization. Because the logo is embedded in the message, it is best to keep the file size of the image small. See *Recommended logo specifications*, page 28.

Contact information – This text is displayed at the end of the notification and may contain HTML 'mailto:' links (default), or URL (http://...) links. It is recommended that you include a telephone number and an HTML link to your Helpdesk email address, or equivalent. It may also be appropriate to refer the user to your organization's Acceptable Use Policy (AUP) using text or an HTML link.

Related topics:

◆ *Configuration page*, page 11
◆ *Setting the timing of inbound notification email*, page 22

Setting the timing of inbound notification email

Configuration page > Tasks panel **> Set inbound notification email timing**

This page allows you to set the time interval in which Personal Email Manager sends blocked inbound notification email.

These settings apply to all queues *except* those individually configured to send notifications immediately. See *Configuring queue options*, page 14.

Inbound Notification Email Timing
Set when you want users to be notified about blocked inbound email.

Notify users of blocked inbound email

⦿ On these days and at these times

☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☐ Sat ☐ Sun

☑ Time 06:00   A notification will only be
☐ Time 14:00   sent if there has been
☐ Time 17:30   *new* blocked email since
                 the last notification.

○ At these intervals

Every 4 ▼ hours from midnight.

Notifications will be sent at: 00:00, 04:00, 08:00, 12:00, 16:00, 20:00

○ Immediately

[OK] [Cancel]

Configuration Fields

On these days at these times – The default setting sends notification email at 06:00 AM, Monday through Friday, every week.

Adjust the settings to meet your needs. You must enter the time in 24-hour format.

> ✓ **Note**
> A notification is sent only if email has been blocked since the last notification.

At these intervals – Notifications are sent every x hours, 7 days a week, beginning at 00:00, Personal Email Manager server time. Increments include: 1, 2, 3, 4, 6, 8, or 12 hours.

This option is especially helpful for international organizations operating in several time zones. Or, if you want notifications to be sent more than 3 times a day.

Immediately – A notification email is sent immediately after an inbound email is blocked in a Personal Email Manager configured queue.

Related topics:

◆ *Editing inbound notification email*, page 20
◆ *Configuration page*, page 11

Editing outbound notification email

Configuration page > **Tasks** panel > **Edit outbound notification email**

An outbound notification email template is supplied with Personal Email Manager. It is recommended that you customize it for your organization.

> ✔ **Note**
> Outbound notification email is sent for each blocked email as soon as the email is blocked.

The template is used for:

◆ HTML notifications – For email clients that support HTML.

◆ Plain text notifications – Used by text-based email clients, such as Blackberry® devices. (Full support for this type of device requires a connection to an IMAP server. See the *Configuration Tool* guide for details.)

A preview of each notification type is displayed below the template.

To review the appearance of the notification, click **Refresh previews**. This updates the previews with your latest changes. It does *not* cause the changes to be saved.

You can also send a test email to experiment with and validate your settings. Sending a test email does *not* cause changes to be saved.

> ✔ **Note**
> Sending a test email when you are logged in as PEMAdmin, generates a prompt to enter an email address.

Edit Outbound Notification Email

Customize the notification email sent to users when an outbound email is blocked.

Introduction: | Please decide what to do with your blocked email.

🔄 Refresh previews
🔵 Send test email

Customization shared by **all** notifications:

Your company logo: | [ ] Browse...

Contact info: | For further inquiries please contact the helpdesk.

🔗 Insert link token

OK   Cancel

HTML Preview

From: Email.Admin@company.com
Subject: Action required for your blocked email: Subject 1

Please decide what to do with your blocked email.

Your company logo goes here.

Reason:	Classified as Policy Type 1
To/Cc/Bcc:	user@domain1.com, user2@domain1.com
Subject:	Subject 1
Date	Sep 4, 2006 9:23 (PST)
Attachments:	1

✅ Deliver   ❌ Do not Deliver

Otherwise it will be deleted in approximately 14 days.

WEBSENSE
Email Security

For further inquiries please contact the helpdesk.

Plain text Preview (displayed on non-HTML clients)

```
From:      Email.Admin@company.com
Subject:   Action required for your blocked email: Subject 1

Please decide what to do with your blocked email.

Reason:   Classified as Policy Type 1

To/Cc/Bcc:   user@domain1.com, user2@domain1.com
Subject:   Subject 1
Date:   Sep 4, 2006 9:23 (PST)
Attachments:   1

To deliver your email, go to Personal Email Manager
( http://sydqadellwork02:8282/PEM/releaseMessageOutboundNotLoggedOn.action?
msgID=1234&userID=1 )

Otherwise it will be deleted in approximately 14 days.

For further inquiries please contact the helpdesk.
```

Configuration Fields:

Introduction – This text is inserted at the top of the notification. It is recommended that you keep the message short, but explain clearly why the notification has been sent.

If the blocked email is in a queue that has Websense Email Security Auto Queue Management (AQM) enabled, and the auto-delete feature is set, the notification email includes a dynamically generated line that indicates the approximate number of days until the email is automatically deleted (as determined by the AQM setting). For example, in the previews above the line reads, "Otherwise it will be deleted in approximately 14 days." If the blocked email is in a queue that has no auto-delete setting, the line is not included.

Your company logo – Inclusion of a logo is common to all HTML notifications. Include your logo to ensure that users understand that the notification is coming from your organization. Because the logo is embedded in the message, it is best to keep the file size of the image small. See *Recommended logo specifications*, page 28.

Contact information – This text is displayed at the end of the notification and may contain HTML 'mailto:' links (default), or URL (http://...) links. It is recommended that you include a telephone number and an HTML link to your Helpdesk email address, or equivalent. It may be appropriate to refer the user to your organization's Acceptable Use Policy (AUP) using text or an HTML link.

Related topics:

◆ *Configuration page*, page 11

Editing review notification email

Configuration page > **Tasks** panel > **Edit review notification email**

This notification is sent to reviewers when an email is blocked and the user has requested that the email be reviewed. For a review notification to be sent, the queue option **Subject to manual review** must be selected. Review notification email is sent as soon as the review request is received from the user.

A review notification email template is supplied with Personal Email Manager. It is recommended that you customize the settings for your organization.

The template is used for:

◆ HTML notifications – For email clients that support HTML.

◆ Plain text notifications – Used by text-based email clients, such as Blackberry® devices. (Full support for this type of device requires a connection to an IMAP server. See the *Configuration Tool* guide for details.)

A preview of each notification type is displayed below the template.

To review the appearance of the notification, click **Refresh previews**. This updates the previews with your latest changes. It does *not* cause the changes to be saved.

You can also send a test email to experiment with and validate your settings. Sending a test email does *not* cause changes to be saved.

> **✓ Note**
>
> If you send a test email when you are logged in as PEMAdmin, you are prompted for an email address.

Configuration Fields:

Introduction – This is specific to this notification and is displayed at the top of the notification. It is recommended that you keep the text short, but explain clearly why the notification has been sent.

If the blocked email is in a queue that has Websense Email Security Auto Queue Management (AQM) enabled, and the auto-delete feature is set, the notification email includes a dynamically generated line that indicates the approximate number of days until the email is automatically deleted (as determined by the AQM setting). For example, in the previews above, the line reads, "Otherwise it will be deleted in approximately 14 days." If the blocked email is in a queue that has no auto-delete setting, the line is not included.

Your company logo – Inclusion of a logo is common to all HTML notifications. Include your logo to ensure that recipients understand that the notification is coming from your organization. Because the logo is embedded in the message, it is best to keep the file size of the image small. See *Recommended logo specifications*, page 28.

Contact information – This text is displayed at the end of the notification and may contain HTML 'mailto:' links (default), or URL (http://...) links. It is recommended that you include a telephone number and an HTML link to your Helpdesk email address, or equivalent. It may be appropriate to refer the user to your organization's Acceptable Use Policy (AUP) using text or an HTML link.

✔ **Note**
To make it easier for users to track the progress of email that has been sent for review, enable the **Show list of reviewers...** option in the **General Options** page. See *Setting general options*, page 29.

Related topics:

◆ *Configuring queue options*, page 14
◆ *Setting general options*, page 29
◆ *Configuration page*, page 11

Recommended logo specifications

Attribute	Recommended	Notes
File size	**< 1024 bytes**	The logo is embedded in every notification message, therefore, it is best to keep the image size (total bytes) as small as possible.
File format	**GIF**	Or JPG or PNG. PNGs with alpha transparency may not display correctly.
Color type	**RGB**	Do not use CMYK.
Color depth	**8 bit**	Or 16 or 24 bit.

Attribute	Recommended	Notes
Resolution	**72 DPI**	
Dimensions	**Maximum = 120 pixels in height or width**	The aspect ratio of your graphic is maintained so that there is no distortion. Images with smaller dimensions may be sufficient. Images with larger dimensions are not accepted.

Setting general options

Configuration page > **Tasks** panel > **General options**
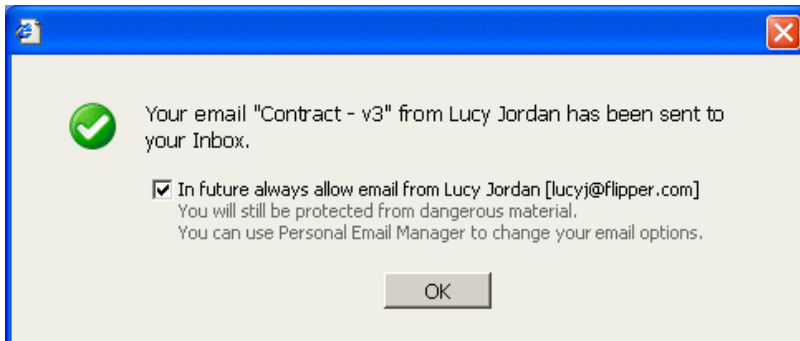

General Configuration Options:

Allow users to manage their own Always Allowed lists: Select this option to allow users to use an **Always Allowed** list. Users manage their list from their **My Junk Email** page and, if configured, can add senders to the list through the Release confirmation pop-up (see following options).

When releasing blocked inbound email...: Select this option to include a check box on the Release confirmation pop-up that allows users to add the sender to their Always Allowed list (see the sample confirmation pop-up below).

Select the user option by default: This option causes the check box in the confirmation pop-up (labeled **In future always allow...**) to be pre-selected (see the

sample confirmation pop-up below). In general, this option is not recommended because it makes it very easy for users to inadvertently create a large Always Allowed list, which can impact system performance.

Allow users to manage their own Always Deleted lists: Select this option to allow users to use an **Always Deleted** list. Users manage their list from their **My Junk Email** page.

Keep copies of Always Deleted email: Select this option to cause a copy of any email deleted automatically by the Always Deleted list to be stored in the designated audit queue.

The **Display previews of blocked inbound email as** option selects the output format of previewed email. Previews of blocked inbound email are allowed only if the user's email does not have to be reviewed. For HTML previews, the text of the HTML part of the email is displayed, but not embedded images, CSS or JavaScript that are stored in other parts of the email. However, the email might display images that are referred to in links to other Web servers.

You need to consider if your organization's risk policy allows your users to see HTML previews (for example, an email could contain 'adult' images).

The **Show list of reviewers...** option causes a list of reviewers to be included in the confirmation email that is sent to the user after he or she clicks **Request Review**. This makes it clear to the user who is reviewing the email and gives the user the names of the appropriate people to follow up with, if necessary.

The **Include friendly names…** option can make it easier for users to recognize the sender of an inbound email. However, spammers generate many random friendly names per email address, which can impact the performance of Personal Email Manager. Enabling friendly names is not recommended for this reason. If friendly names are enabled, you must set a limit on the number of names per email address. The default is 3.


Related topics:

◆ *Configuring queue options*, page 14

Setting up administrators

Configuration page > **Tasks** panel **> Set administrators**

To provide ease and flexibility in the administration of Personal Email Manager, you can create multiple administration accounts.

The **Administrators:** list displays all the administrators, including the predefined PEMAdmin account. Administrators are identified by their primary email address, except PEMAdmin.

Administrators have the same permissions as PEMAdmin, including the ability to create other administrators.
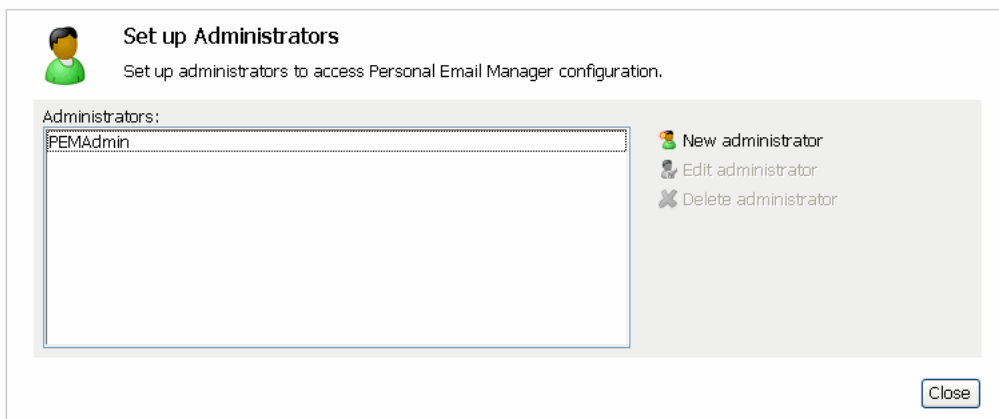
Use the links on this screen to add, edit or delete administrators.

> ✔ **Note**
> PEMAdmin is a reserved account that cannot be deleted.
> You can change the password, but not the name.

New administrator – Opens the New Administrator Account page.

Edit administrator – Available only when you select an administrator, opens the Edit Administrator Account page.

Delete administrator – Available only when you select an administrator other than the current administrator or PEMAdmin. You can select only 1 administrator at a time. You are prompted to confirm the deletion.

Related topics:

◆ *Adding or editing an administrator account*, page 32
◆ *Setting up or editing queues*, page 12

Adding or editing an administrator account

To add a new administrator, enter the administrator's email address.

Non-directory Configured Systems

To add an administrator when Personal Email Manager is not integrated with an LDAP server, you must enter the administrator's email address, establish a password and confirm the password. If you are editing the account, you can only change the password.

Editing the PEMAdmin Account

To change the password for the PEMAdmin account, enter the new password and then confirm it.

Related topics:

◆ *Setting up administrators*, page 31

Modifying a user's settings

Configuration page > **Tasks** panel > **Modify user's settings**

Use this link to log in as another user. This gives you full access to the user's settings. The user's login name is displayed at the top right of the screen below the banner.

You cannot log in as another administrator.

For systems that do not use an LDAP directory server, enter the user's full email address.

When you are logged in as the user, you can:

◆ Change the user's password – Only for non-directory configured systems. You do not need to enter an old password.

◆ Edit their Always Allowed and Always Deleted lists.

◆ Manage a user's blocked email: Preview, Receive, and so on. Email that is released is sent to that user's Inbox.

◆ Delete all of their blocked email.

When you log out, you are returned to the Configuration page and your administrative login.

Related topics:

◆ *Changing passwords*, page 33
◆ *The My Junk Email page*, page 34

Refreshing directory information

Configuration page > **Tasks** panel **> Refresh Directory Cache**

To optimize performance, Personal Email Manager maintains a cache of directory information. Personal Email Manager automatically refreshes the cache every 24 hours.

You should manually refresh the cache if you have added or modified groups or organizational unit memberships. You may also want to refresh the cache if you delete users, groups or OUs.

The refresh process begins immediately. The system may run slower while the cache is rebuilt. The time it takes to complete the refresh depends on the size of the cache and the complexity of your queue and directory information.

> **✔ Note**
> Sometimes the refresh may not take effect for a few minutes, depending on system load.

Changing passwords

The Personal Email Manager password facility is used only when Personal Email Manager does not use an LDAP directory server.

To change your password, log into Personal Email Manager and click the change password icon in the banner at the top of the screen.

Enter the old password, a new password, and then confirm the new password. This password affects only access to Personal Email Manager.

If you are logged in as another user, the **Old password:** field is unavailable. For details regarding logging in as another user, see *Modifying a user's settings*, page 32.

Related topics:

◆ *Modifying a user's settings*, page 32

Banner icons

The banner icons include:

Icon	Description
	Change Password Available for non-LDAP configured systems only. See *Changing passwords*, page 33.
	Context-sensitive Help Opens Help for the screen that you are using.
	Log Out

Related topics:

◆ *Configuration page*, page 11

◆ *Changing passwords*, page 33

The My Junk Email page

The My Junk Email page and all functions provided by Personal Email Manager to end-users are described in *Personal Email Manager User Help*. Some additional information is provided here for administrators.

The Configuration page is not displayed to end-users.

The **Action** column includes a Receive link and may include a Preview link. Clicking Receive initiates the same action as clicking Receive in a notification email.

The **From** column displays the name of the sender. The Friendly Name is displayed, if available.

If you are a Domain Manager, a **To** column is also displayed that shows 1 recipient per row. This enables you to release each recipient's email individually.

The **Tasks** list provides links to:

◆ Bookmark the page

◆ Delete all blocked email

◆ Edit the Always Allowed and Always Deleted lists

   The Always Allowed and Always Deleted lists are available only if the **Allow users to manage...** options are selected in the General Options page. See *Setting general options*, page 29.

An entry in the Always Deleted list always overrides an entry in the Always Allowed list. The Always Deleted list is processed first.

Related topics:

◆ *Setting general options*, page 29
◆ *Configuring queue options*, page 14
◆ *Previewing an email*, page 35

Previewing an email

When the **Preview** button is clicked, a pop-up provides a preview of the email. The preview is either plain text or HTML, according to the setting in General Options.
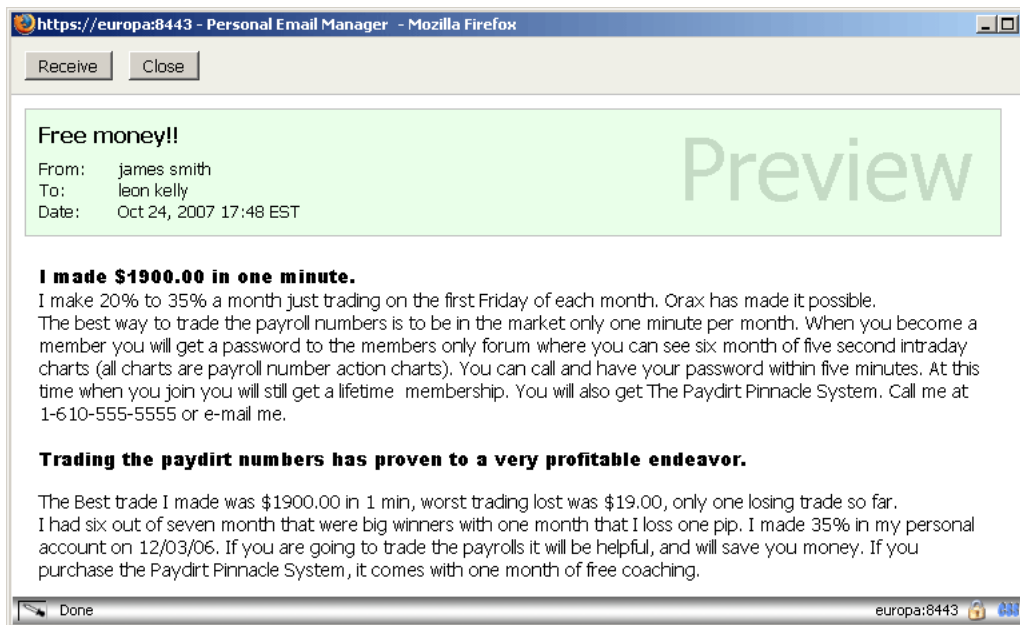
Receive – If you are a Domain Manager, this button is **Release**.

Close – Closes the pop-up window and returns you to the My Junk Email window. In browsers that don't support JavaScript, the preview is displayed in the main window and a **Close** button replaces the **Back** button.

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