ClientNet Admin Guide

Boundary Defense for Email

MailStreet Live Support: 866-461-0851

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❖ **FEEDBACK:** If you note mistakes in this guide, or identify procedures that are incorrect, we encourage you to email your feedback to userguidefeedback@hostaccount.com. We continually strive to improve our customer support resources and your feedback in invaluable in assisting us with our goal to provide exceptional customer service.

❖ **PLEASE NOTE:** This MailStreet Hosting Control Panel **Support Resources** section is updated periodically as new customer resources are added to assist customers with the use of their hosted services. You should occasionally check for updates to these support resources by logging into the Admin Control Panel and selecting the **Help & Support** menu option under the **Hosting** menu.

Overview

This guide is for administrators of MailStreet Boundary Defense for Email services. It provides an introduction to ClientNet and procedures for managing your Users and Domains. It also describes how to make the most of the comprehensive reporting features of ClientNet.

1 Introduction

1.1. Audience and Scope

Welcome to ClientNet, the MailStreet Boundary Defense for Email client portal. This guide provides step-by-step instructions for administrators on using ClientNet to set up and manage the MailStreet Boundary Defense for Email Email and Web Services users and domains. It also describes how to make the most of the comprehensive reporting features of ClientNet.

1.2. International Considerations

Due to local legislation, some features described in this document are not available in some countries.

1.3. Conventions

In this guide, the following conventions are used:

Formatting	Denotes
Bold	Button, tab or field
Bold Italic	Window title or description
Note:	A note containing extra information that may be useful
`Text to type in`	Text to type in, or output from a computer
Link	A link to a website

Screenshots normally display an ***Internet Explorer*** window. If only part of the window is shown, the side where it is trimmed may be shown with a wavy or dashed line. Areas of the screenshot may be highlighted in red.

1.4. Legal Considerations

Clients are advised to seek specialist advice to ensure that they use the MailStreet Boundary Defense for Email Security Services in accordance with relevant legislation and regulations. Depending on jurisdiction this may include data protection law, privacy law, telecommunications regulations, employment law and other regulations. In most jurisdictions it is a requirement that users of the service are informed about or give consent to the fact that their email is being monitored and intercepted for the purpose of providing the protection offered by the MailStreet Boundary Defense for Email service

2 Getting Started

ClientNet is a center for the information, resources, support, and configuration of your MailStreet Boundary Defense for Email services. The easy-to-use screens provide you with a dashboard view of your service statistics, summary and detailed reporting features, and functionality for managing your user and domain data, all in one place:

- **Service dashboards** – the Email Dashboard provides a visual snapshot of all your key service statistics in one place and in real time.
- **Reports** – download PDF summary reports of your email, web, and instant messaging security statistics, containing graphs, tables, and key statistics relating to traffic volumes and service performance. Download CSV file containing detailed statistics on your services. You can also schedule reports to be emailed to you at regular intervals.
- **Administration** – allows you to manage your ClientNet users and submit change requests.
- **Email Services Configuration** – configure settings for your email Anti-Virus, Anti-Spam, Spam Quarantine, and Content Control services.
- **Email Routing** – Define the IP address ranges (routes) for your inbound and outbound email traffic.
- **Support** – provides access to resources, such as Track and Trace, alerts on services and performance.

Depending on your organization's configuration, you may not see all of these sections in ClientNet. The features you see depend on your organization's service configuration and your access permissions.

2.1. Logging in and out

To log in to the ClientNet portal which is used to manage all ClientNet configurations and reports, you will access the MailStreet Boundary Defense for Email Service through the MailStreet Control Panel: https://cp.mailstreet.hostaccount.com

To log in to ClientNet:

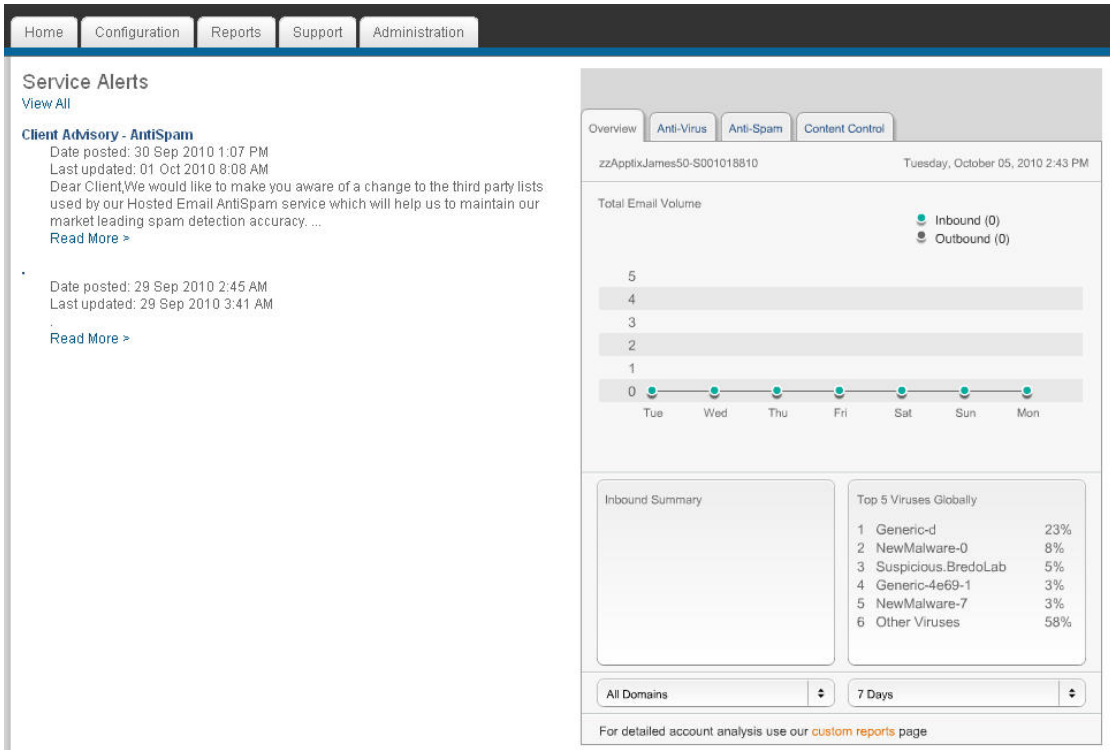
1. Log into the MailStreet Control Panel using your administrator username and login.
2. Click on **Hosting | MailStreet Boundary Defense for Email** to access the MailStreet Boundary Defense for Email service window
3. In the section titled Access to MailStreet Boundary Defense for Email control panel, click on the link next to the **Log in to control panel** option.
4. The ClientNet portal for your account should be displayed in a new window. Use your BDE admin credentials to log in.
5. **NOTE:** Use the BDE Admin login and password that are listed in the Apptix Control Panel just above the **Log in to the control panel** option. Click on the View Password link to display the admin password.

To log out ClientNet:

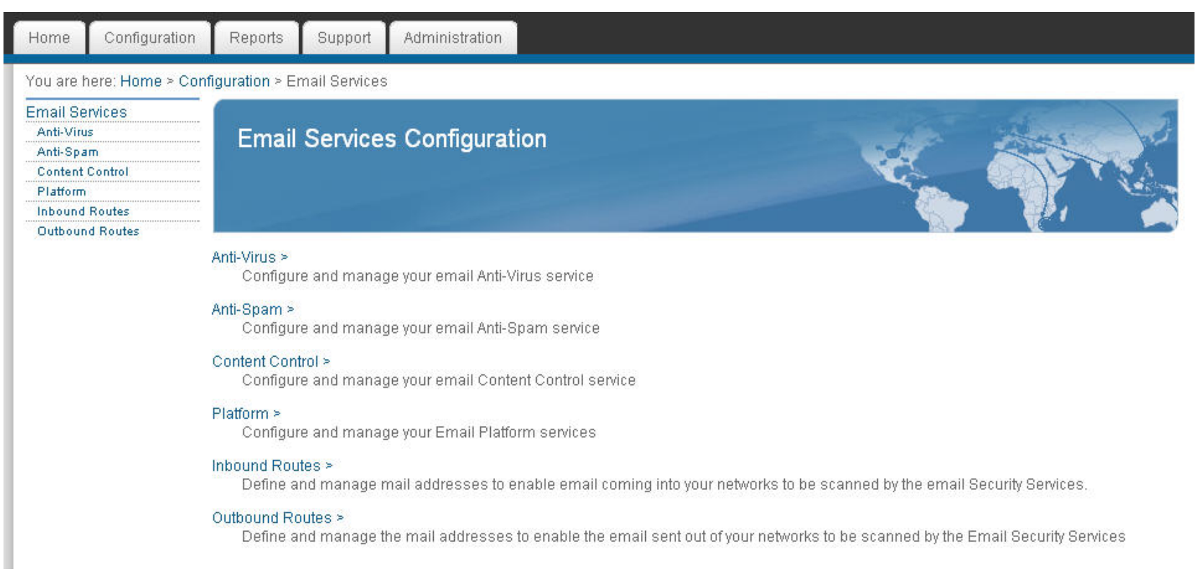
1. From any screen in the ClientNet portal, click the **Log Out** link at the top left of the screen.

2.2. Navigating ClientNet

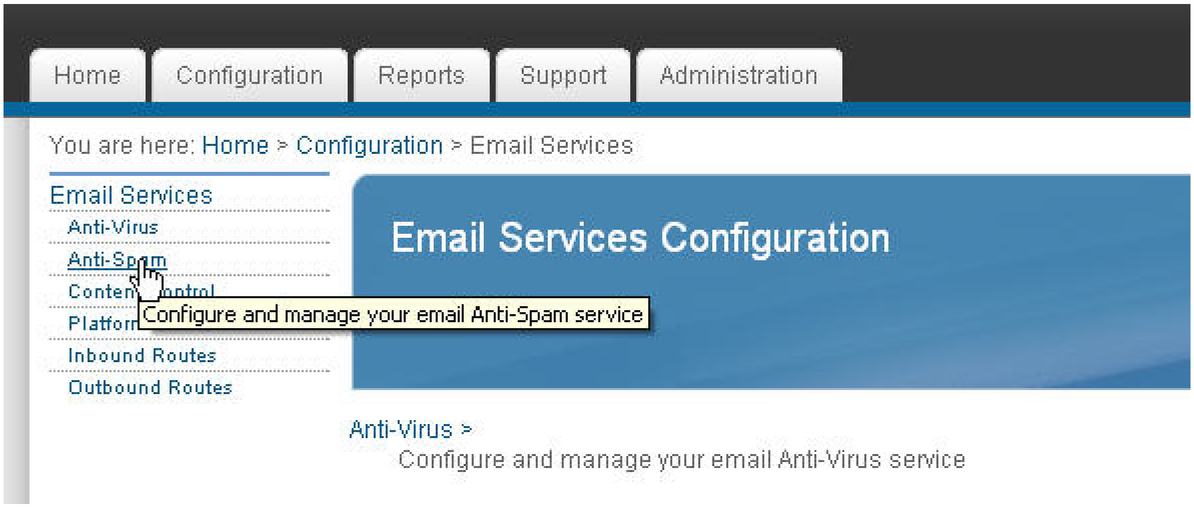
The ***Home*** page of **ClientNet** presents the Email Service Dashboards. The dashboard provides a graphical view of the statistics for your Email Security Services. The ***Home*** page also provides service and news alerts



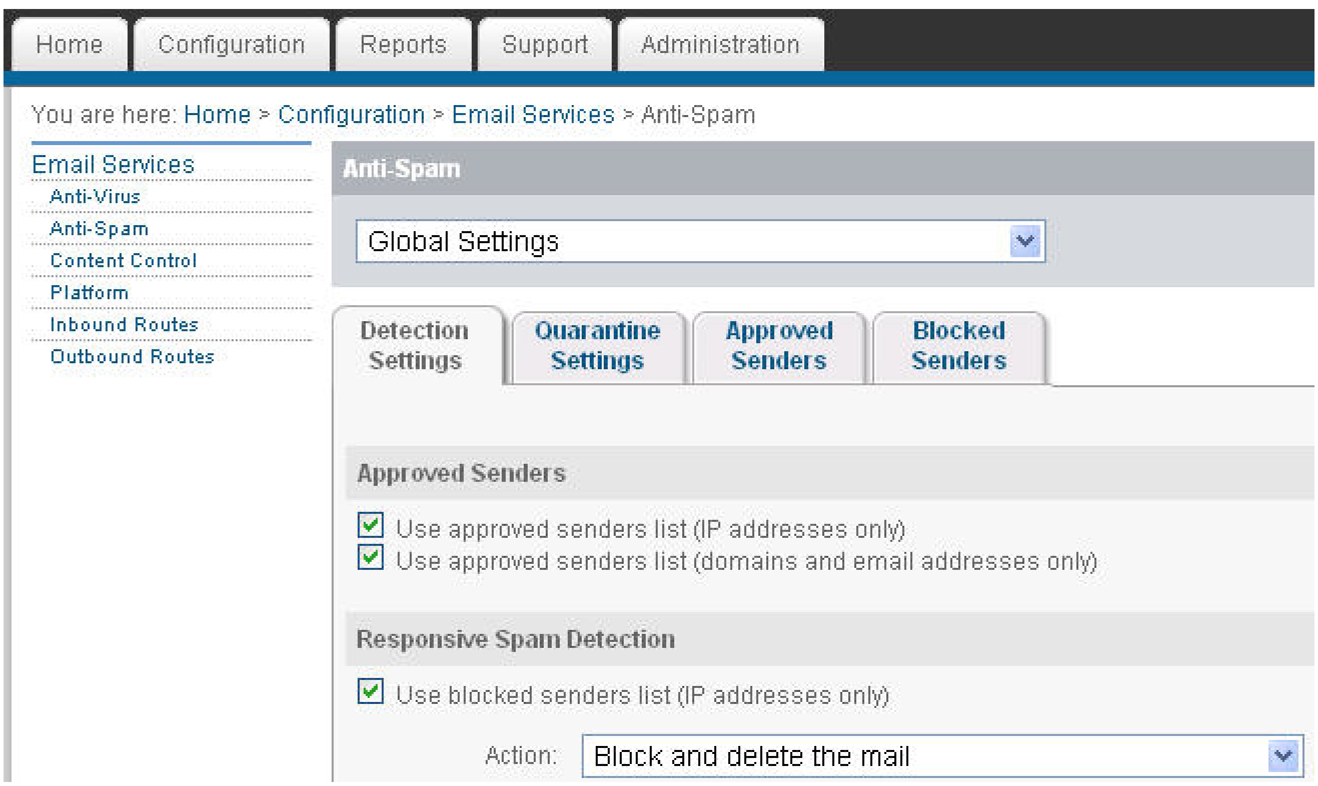
From the ***Home*** page, use the top navigation bar to access the main configuration, reporting, and administration areas of ClientNet. When you have navigated away from the ***Home*** page into another area, a main page for that section is displayed. This provides links to the main tasks within the area.



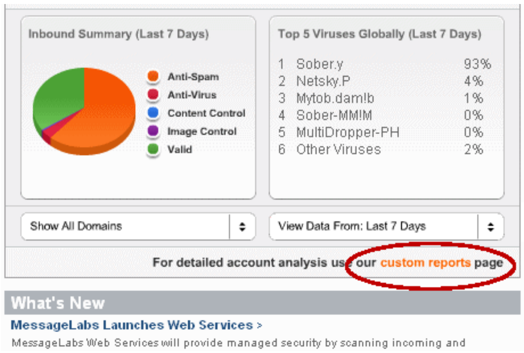
Clicking a link on the main page takes you to the page of interest.



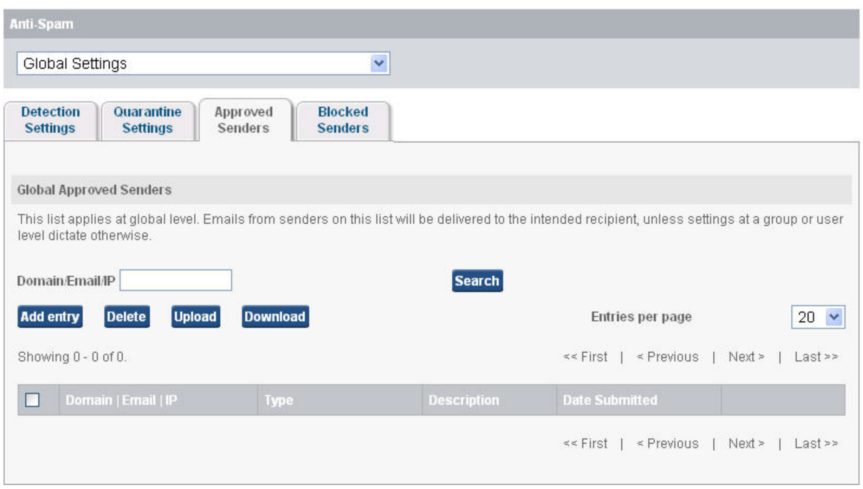
A navigation bar displays on the left. This provides access to the features within the area.



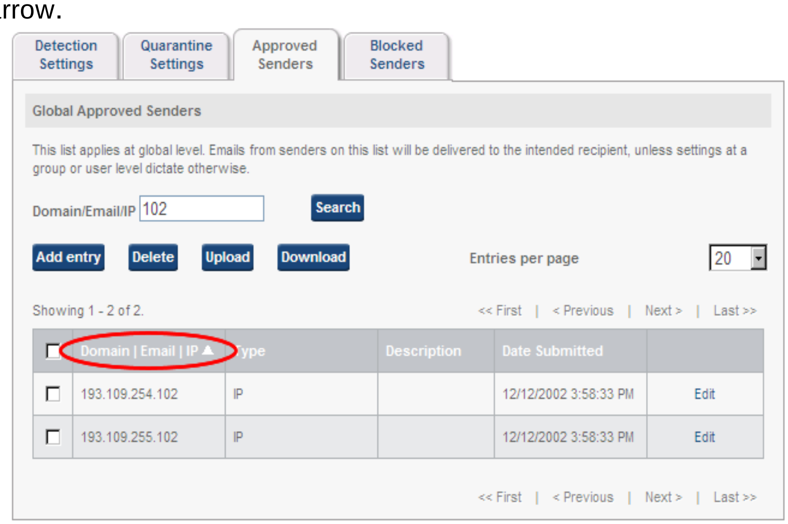
Some pages have links to other pages. For example, at the bottom right of the ***Email Services Dashboard*** there is a link to the reporting page relevant to the statistics you are viewing. These links are **orange.**



Pages that provide lists of entries, for example, an Anti-Spam approved senders list, generally display ten items per page. The **Previous** and **Next** buttons enable you to see more entries than can fit on a screen.



You can sort entries in lists by clicking on the column label. The sort direction is indicated with an up or down arrow.

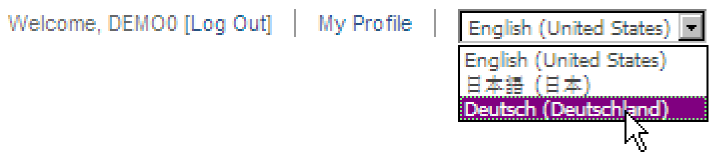


2.3. Language Support

ClientNet is currently available in English (US), German, and Japanese.

To change the language you see on screen

- Select the required language from the drop-down menu at the top of any screen.



2.3.1 Support for non-Latin-based languages in ClientNet

In most places where you enter characters in ClientNet, you can use all Unicode characters.
The only places where you are limited to single-byte alphanumeric characters (ASCII characters) are:

- Email Content Control
- Names of lists
- Names of rules
- Names of groups

Names of files can be entered using double-byte characters but these must be UTF-8 encoded.

For details of character sets and encoding types that are supported for use in Email Content Control lists to detect text content in emails and instant messages, see Non-Latin-based language support.

2.4. Support

The ***Support*** area of ClientNet provides access to the following resources to help with any enquiries on MailStreet Boundary Defense for Email services.

Depending on your organization's configuration, you may not see all of these sections in ClientNet.

- **Service Alerts** provide information about events that may affect the provision of MailStreet Boundary Defense for Email services in some way, for example, when updates are being performed. It also provides announcements about new and enhanced services available from MailStreet Boundary Defense for Email.
- **SMS Alerts** enable you to receive SMS alerts (text messages delivered to a mobile device) when there are any critical announcements from MailStreet Boundary Defense for Email, for example, delays in the services. See *Section 2.5. , Setting SMS alerts*.
- **Help** provides access to a searchable online help system containing full details for administrators on configuring Symantec services.
- **Track and Trace** enables you to search for a specific email and to see if it has been processed by the MailStreet Boundary Defense for Email Email Security Services. The results show whether and when an email was received onto the MailStreet Boundary Defense for Email infrastructure, was scanned, blocked, or deleted, and if it was delivered successfully.
- **Contact Us** provides full contact details for MailStreet Boundary Defense for Email technical support.

2.5. Setting SMS Alerts

You can receive SMS alerts (text messages delivered to a mobile device) when there are any critical announcements from MailStreet Boundary Defense for Email, for example, delays in the services.

The SMS alerts are specific to your services. You can define which domain(s) to receive alerts about. You can have SMS alerts sent to up to five phone numbers.

To receive SMS alerts

1. Select **Support > SMS Alerts**.
2. From the **Global settings** drop-down list, either:
   - To receive SMS alerts for all domains on the same telephone numbers, select **Global settings**, or
   - To receive SMS alerts for a specific domain, select the required domain name.
3. Enter up to five telephone numbers on which to receive SMS alerts. Include the country and area codes.
4. Click **Save and Exit**.

3 Reporting On Your Services

Extensive reporting features are available in ClientNet; graphically via the services dashboards, and via summary reports (PDF) and detailed reports (CSV), located in the ***Reports*** tab. You can also define scheduled reports to be mailed to recipients that you define, on a regular basis (for Email Security Services).

You can get reports on your Email Services for all your domains or for individual domains. The enhanced granularity of reporting helps you to gain a thorough understanding of the effectiveness of your services.

A new way of requesting reports is available. Click on **Reports** and select **Report Requests** from the left navigation bar. For Help on these pages, see ***Section 4, Using Report Requests.***

3.1. Dashboards

The Email Dashboard provides a visual snapshot of all your key email statistics in one place and in real time. Graphs and charts show statistics for all of your email, web and IM services and for each service individually.

The dashboards are on the ClientNet homepage.

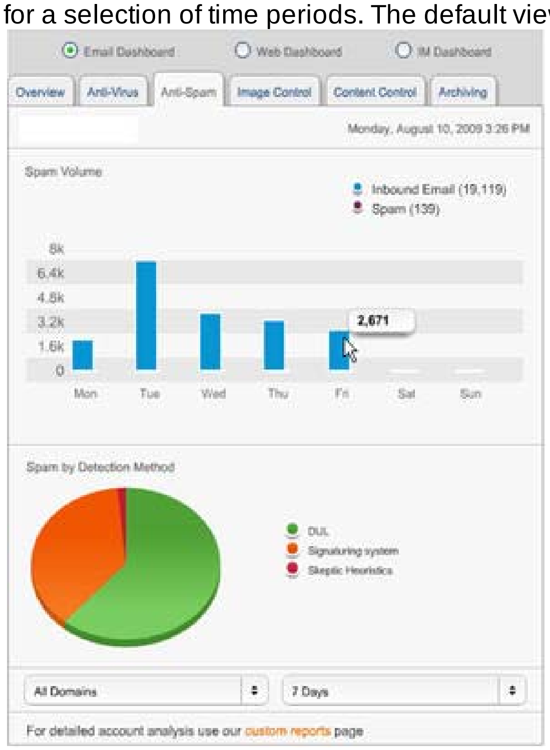
To see the Email Dashboard

- Click the option button at the top of the currently visible dashboard.

To display actual values in the graphs and charts, hover over the item of interest – either the point on a graph or section of the pie chart. The value of that item is displayed.

3.1.1 Email Dashboard

The ***Email Dashboard*** graphs and charts show statistics for all of your services and for each service individually for a selection of time periods. The default view is for all your domains for the last 7 days.



Overview tab shows the overall volume of email for your account for the last seven days. The ***Inbound Summary*** compares clean mail (valid mail) to mail stopped by various services. Each service tab on the ***Email Dashboard***

provides the key performance details for that service.

To change the domain to view

1. Click the arrow symbol on the **Show All Domains** pop-up box at the bottom of the ***Email Dashboard***.
2. The domains you can view are displayed in the pop-up list
3. Select an option from the list.
   - The ***Email Dashboard*** updates to reflect your choice.

To change the time range of data to view

1. Click the arrow symbol on the **View Data From** pop-up box at the bottom of the ***Email Dashboard***.
2. The options for the time ranges you can view are displayed in the pop-up list.
3. Select an option from the list.
   - The ***Email Dashboard*** updates to reflect your choice.

3.2. Summary Reports

Summary reports are ideal for providing status updates and metrics in a convenient PDF format. Generate a summary of your security statistics across all your Email Security Services. View graphs, tables, and key statistics on overall and domain-specific email volume and service performance. Customize your report by fixed or custom date ranges. Data for email services summary reports is available for the last 12 months.

Summary reports do not include Spam Quarantine statistics.

To generate a summary report

1. For Email Services reports, Reports > Email Services Reports > Summary Reports
2. In the ***Summary Reports*** page, select the date range for the report from either the pre-defined date ranges using the option buttons, or by specifying the **From** and **To** dates, as required.
3. For Email Services, select the domain to report on or select **All Domains** from the drop-down list.
4. Click the **Generate Report** button.
   - The report may take several moments to run. It is displayed in a new window.

3.3. Detailed Reports

Detailed reports are ideal for in-depth service data analysis. Generate CSV files containing detailed Email Security Service statistics. Export spreadsheet data on the performance of individual services. Customize your report by sender or recipient, fixed or custom date range, domain (for email services), and service criteria. Data for detailed reports is available for the last 30 days.

To generate a detailed report

1. For Email Services, Reports > Email Services Reports > Detailed Reports.
2. The page displays the settings for you to define and generate the report you need.
3. Select the report type.
4. Select the date range for the report. Select from the pre-defined date ranges using the option buttons, or click **Between two dates** and specify the **From** and **To** dates, as required.

   Data for Email services detailed reports is available for the last 30 days.

5. Customize the report to your requirements:
   - For Email Services, limit the range of the report to particular domains or users. To report on both inbound and outbound mail, enter criteria in both the **Sender** and **Recipient** fields. Use the % wildcard to select all senders or recipients from a specific domain, for example, %dom.co.uk.

6. Click the **Generate report** button.
   - The report is displayed in a new window and may take several moments to run.

   Detailed reports return a maximum of the first 10,000 records.

3.4. Scheduled Reports

Scheduled reports are service reports that are sent by email. They provide an overview of the performance of your email and web security services – for email services, either globally or by domain – and can be used to monitor service performance and carry out detailed trend analysis. For email services, you can specify the content, frequency, and recipient email addresses for your scheduled reports within ClientNet. For web services, you can specify the frequency of reports and recipient email addresses.

Reports are delivered in text, CSV (comma separated values), and HTML format. Reports in CSV format can be imported into spreadsheet or database applications and are therefore ideal for detailed analysis or for generating bespoke graphs and statistics.

Email Security Services – Scheduled Reports

SERVICE TYPE	REPORT TYPE	REPORT DETAILS
Anti-Virus	**Weekly and Monthly Summary Report** - a set of tables that provide an overview of key statistics for the Anti-Virus service for the specified period across all client domains.	• Total for all domains – mail volume, virus volume sent, virus volume received, total virus volume, and virus volume as a percentage of mail. • Total by domain – mail volume, virus volume sent, virus volume received, total virus volume, and virus volume as a percentage of mail, grouped by domain. • Virus type for all domains – virus name, volume sent, volume received, and total volume. • Virus type by domain – virus name, volume sent, volume received, and total volume, grouped by domain.
	Weekly Detail Report - a detailed log for all client domains listing all virus activity. NOTE: A monthly detail report is not provided due to the potential size of such a report. Domain-specific weekly scheduled detail reports are not currently supported.	• Includes date and time email scanned, virus name, virus sent or received, client domain, recipient email address, and sender email address.
Anti-Spam	**Weekly and Monthly Summary Report** - a set of tables that provide an overview of key statistics for the Email Anti-Spam service for the specified period across all client domains.	• Total for all domains – mail volume, spam volume as a percentage of total mail, spam volume for each type of detection and as a percentage of total spam, and total mail. • Total by domain—domain name, mail volume, spam volume and spam volume as a percentage of total mail.
Spam Quarantine	**Weekly and Monthly Summary Report** - a set of tables that provide an overview of key statistics for the Spam Quarantine service for the specified period across all client domains.	Provides summary information on the total number of accounts created, the number of accounts created manually, the number of accounts created automatically, the number of log in actions, and the number of messages released. The report also provides statistics on: • Quarantine release per domain – the number of releases per domain. • Quarantine logins per domain – the number of logins per domain.
Content Control	**Weekly and Monthly Summary Report** - a set of tables that provide an overview of key statistics for the Content Control service for the specified period across all client domains.	• Total for all domains – mail volume, detected email sent, detected email received, total detected email, and detected email as a percentage of total mail. • Total by domain – domain name, mail volume, detected email sent, detected email received, total detected email, and detected email as a percentage of mail. • Total by domain and rule – domain name, rule name, detected email sent, detected email received, and total detected email.
	Weekly Detail Report - a detailed log for all client domains listing all Content Control activity. NOTE: A monthly detail report is not provided due to the potential size of such a report. Domain-specific weekly scheduled detail reports are not currently supported.	• Includes date and time email scanned, content control rule name, subject line, sent and received, recipient domain name, recipient email address, sender email address, and email size (K).

To schedule a report

1. Select Reports > Email Services Reports > Scheduled Reports. Each tab contains the settings to define the scheduled reports for your services:

   - Weekly and monthly summary reports – provide an overview of key statistics for the selected service for the specified period across all client domains.

     Monthly detail reports are not provided due to the potential size of such a report. Domain-specific weekly scheduled detail reports are not currently supported.

   - Weekly detail reports (except Email Anti-Spam Services) – provide a detailed log for all domains listing all service activity per domain, including date and time email scanned, recipient and sender email address, email size, and other service-specific data.

     Due to the large volume of spam processed by MailStreet Boundary Defense for Email, it is not feasible to produce a scheduled detail Email Anti-Spam report.

4 Using Report Requests

The following sections provide information on using the new ***Report Requests*** pages in ClientNet.

The original reporting pages are still available at **ClientNet > Reports**. For information on Reports, see ***Section 3 , Reporting on your Service***s.

4.1. What's New in Report Requests?

What are the new or changed features?

MailStreet Boundary Defense for Email has introduced a new reporting section into the ClientNet configuration portal. The new pages provide a more flexible approach to defining report requests, with a wizard-based set of pages that guide you through the process. You can generate summary and detailed reports on the same data as you are used to. Report requests are easy to define and schedule.

The features of the new Report Requests section are:

- A new reporting engine generates existing reports asynchronously—reports are quicker to generate and remain available for download
- You can combine data from different services in a single report request
- When you define a report request,you can save it to use again
- Extended scheduling and delivery options are available
- Reports are available to download from the Report Requests main page or can be delivered by email
- Report requests can be shared so that other users can download them

The new Report Requests section enables you to:

- See a list of the report requests that you have defined for one-off and scheduled runs
- See report requests that other users have created and elected to share
- Create new report requests or edit existing ones
- Create a report request and run it straight away
- Define a schedule for a report to generate automatically in the future
- Have a report delivered by email to specified users
- Re-run report requests that you have created before
- Combine data on different services into a single report delivery

For further information about generating reports, including an overview of the process of defining a report request, see ***Section 4.2. , About generating reports***.

4.2. About Generating Reports

What do I need to know about generating reports?

The new ***Report requests*** section of ClientNet guides you through the process of requesting reports with an easy-to-use wizard. The wizard provides steps to request summary and detailed reports with more flexibility to define the data in the report, the reporting period, the schedule, and delivery options. The *report requests* that you define can be used again and again.

You can create a report request, navigate away, and return to download the generated report or have the report delivered by email. This section provides the following information about generating reports:

- Process overview
- Using the wizard
- Active and inactive report requests
- Shared and private report requests
- Report formats
- Languages

For more information about the report data, including constraints on the data that is available, see ***Section 4.3. , About the report data.***

You are advised to check your local legislation prior to generating and/or distributing reports. In certain countries it may be necessary to obtain employee consent.

4.2.1 Process Overview Table

SERVICE TYPE	DETAILS	FOR ADDITIONAL INFORMATION
Ensure you have permission to view reports	To use ***Report requests***, you must have the **View Statistics** custom role or the **Reports** standard role assigned to your ClientNet user account	*Section 4.4; Permissions for Reporting*
Log into ClientNet	Navigate to the ***Reports*** section. From the left navigation bar, click the **Report Request** link.	
Define a report request	1. In the ***Report Requests*** page, click **Request a new report**	
	2. Enter a name for the report request	
	3. Choose the data to include in the report	*Section 4.6; Selecting the data for a report*
	4. Add filters to focus the report	
	5. Select the period to report on	*Section 4.7; Selecting the time period and schedule for a report*
	6. Schedule the report to generate automatically (if required)	
	7. Select who you want to receive the report and how	*Section 4.8; Setting delivery options for a report*
	8. Confirm the report request If the report is not scheduled to generate at a later date, the report starts to generate immediately	*Section 4.9; Confirming a report request*
View a report	When a report has generated, it is available to download. Depending on the delivery options you have selected, you can access the report in the following ways: • As a ZIP file attachment in an email • Via a link in an email to a secure download area that you log into with your ClientNet login details • By clicking the Download link in the Report Requests page in ClientNet	*Section 4.10; Viewing a generated report*
Manage your report requests	Report requests are listed in the ***Report Requests*** page, and can be viewed, edited, deleted, cloned, and managed from here.	*Section 4.5; Viewing and managing report requests*

4.2.2 Using the Wizard

When you navigate to **Reports > Report Requests**, the existing report requests are listed.

The wizard opens when you create a new or edit an existing report request. Give the report request a name. You are now in step 1 of the wizard. The following steps are presented:

1. Select data
2. Time period
3. Delivery
4. Confirm request

You can click between the steps in any order by clicking the step indicators at the top each screen or by using the **Back** and **Continue** buttons. However, when creating a new request, it may make sense to complete each step in order. When you move between pages of the wizard, your changes are saved. However, you must click **Submit** in step 4, ***Confirm request*** for the request to be saved when you navigate elsewhere in ClientNet.

Clicking **Cancel** in the wizard will take you out of the wizard and no settings will be saved. Only step 1, **Select data**, requires you to make a selection. Unless you edit the settings in steps 2, 3, and 4, the default settings in those pages will be used.

The step indicators display as follows	
	The screen is not selected and has not been changed NOTE: if there are default settings in the screen—i.e. in steps, 2, 3, and 4—no changes need to be made; the default settings will be used. Only step 1, **Select data**, requires you to make a selection
	The screen is currently selected. No changes have been saved in this screen yet.
	Settings have been defined successfully in the screen NOTE: You can still make changes in the screen, if required.
	No selections have been made. At least one option must be selected in the screen NOTE: Only step 1, **Select data**, requires you to make a selection. The default settings in steps 2, 3, and 4 will be used.

For full information on each screen of the wizard, see:

- ***Section 4.6. , Selecting the data for a report***
- ***Section 4.7. , Selecting the time period and schedule for a report***
- ***Section 4.8. , Setting delivery options for a report***
- ***Section 4.9. , Confirming a report request***

4.2.3 Active and Inactive Report Requests

Reports are either active or inactive.

- An *active* report request is either:
  - Scheduled to generate in the future
  - In the process of being generated

An active report becomes inactive when it is not scheduled to generate again in the future.

- An *inactive* report request is either:
  - A one-off report that has generated and is ready for download
  - A scheduled report, and the final report of the schedule has generated
  - An active report that has been deactivated—even if the report is scheduled to generate in the future, it will not do so

Inactive reports can be re-used. Keep the data and delivery settings, and simply change the time period, as required. If you edit the schedule of an inactive report to run again in the future, the report will become active.

For more information about activating and deactivating report requests, see ***Section 4.5. , Viewing and managing report requests.***

4.2.4 Shared and Private Report Requests

Reports are either private to the user who created them or shared. By default they are private. You can choose to share a report with all other ClientNet users in your organization. This is useful if you have multiple administrators accessing the Report requests pages and want to share reports quickly.

- **Private**—report requests that you have created. Only you can edit private report requests. No one else can see or download these.

If you have specified other recipients in the **Delivery options** screen of a private report request, they can access the generated report via an email attachment or secure download (also defined in the **Delivery options** screen). They will not see the report request in the ***Report requests*** screen.

- **Shared**—report requests that you or another user has created and shared. All ClientNet users in your organization with per- mission to see the ***Report requests*** pages can see shared reports. Only the user that created a shared report request can edit it. Other users can only download the generated report.

For information on how to share a report request or make it private, see ***Section 4.9. , Confirming a report request***.

4.2.5 Report Formats

Reports come in various formats depending on the data requested:

- ***Summary reports***—delivered as PDF files. They contain a variety of visually rich tables, lists, and charts.
- ***Detailed reports***—delivered as CSV files. They can be imported into spreadsheet or database applications and are ideal for detailed analysis or for generating bespoke graphs and statistics.

You can mix summary and detailed report components on all service types in a single report request. The summary report components will be combined into a single PDF report. Each detailed report component will be a separate CSV file. So a single report request may generate multiple files.

When the report is downloaded, all of its component files will be combined into a single ZIP file.

See also ***Section 4.3. , About the report data.***

4.2.6 Languages

Reports are available in English, German, and Japanese. By default, the text of a report will be in the language that is currently selected in the language selector at the top right of any screen in ClientNet when the report request is first created.

You can specify a report in a different language than the current language of ClientNet in the step 3. of the wizard (see ***Section 4.8. , Setting delivery options for a report*****).**

4.3. About the Report Data

This section provides the following information about report data:

- How are reports useful to my organization
- What reports are available?
- Are there limits to the amount of data available for reports?

How are reports useful to my organization?

FEATURE	BENEFIT
Email Performance	Report on the performance of the Email services. Reports provide you with information about what has been blocked and what triggered the blocks.
Regional Reporting	You can report on your email traffic filtered by group. This is useful, for example to check performance by regional group.
User-level Reporting: Acceptable Usage Policy	You can report at user level, for example to check an individual's use of the Internet for non-work purposes. The report could then be used in employee reviews.

What reports are available?

4.3.1 Summary reports

Summary reports comprise charts, graphs, and tables that to provide an overview of key statistics for your services for the specified period across all or individual domains.

Summary reports are ideal for providing status updates and metrics in a convenient PDF format. You can filter summary reports on Email data by domain.

4.3.2 Detailed reports

Detailed reports provide a detailed log listing all service activity for all your domains.

Detailed reports are ideal for in-depth service data analysis. They are delivered as CSV files, and can be imported into spreadsheet or database applications and are therefore ideal for detailed analysis or for generating bespoke graphs and statistics. They contain detailed statistics on your Email services.

You can filter detailed reports by sender or recipient, fixed or custom date range, domain (for email services), and other service criteria.

Are there limits on the amount of data available for reports?

4.3.4 Data Constraints

The constraints on the data available for reporting are as follows:

- There is a limit to the number of rows of data in a single detailed report CSV file of 160,000 rows
- There is no limit to the amount of data contained in a single PDF summary report
- A generated report is available to download for 28 days
- There are limits on the amount of data available for certain reports. If you have selected a time period to report on that is not available for the data you have selected, the report will not be generated. The request will have an **Error** status.

To see and use the **Report Requests** section of ClientNet, a user account must have one of the following roles assigned to them:

Report	Last 60 Mins (full data for the last hour may not be available)	Last 12 Hours	Last Day	Last 7 Days	Last Month	Last 12 Months
Email Summary	✗	✗	✓	✓	✓	✓
Email Detailed	✗	✗	✓	✓	✓	✗

4.4. Permissions for Reporting

Who can use Report Requests?

To see and use the **Report Requests** section of ClientNet, a user account must have one of the following roles assigned to them:

- Standard role: **Reports**
- Custom role: **View Statistics**

You can assign the role to grant permission for reporting on specific services and/or domains, or on all services and domains. For full details on assigning roles, see ***Section 5.3. , Managing roles***.

Can a user without permission to see the *Report requests* pages access my reports?

A user without access to the ***Report Requests*** section of ClientNet can be sent a report via email—either in an email attachment or via a link in an email to a secure download area that they log into with their ClientNet login details.

For more information on specifying recipients for reports, see ***Section 4.8, Setting delivery options for a report***.

4.5. Viewing and Managing Report Requests

Where?

- Click **Reports** in the top menu bar, then from the left navigation bar, click **Report Requests**.

How do I select, download, and manage my reports?

The ***Report requests*** page shows key details of all existing report requests.

Because the status of reports changes automatically (e.g. when a scheduled report generates), the screen refreshes regularly. You can also refresh it yourself.

From here you can:

View report requests
All existing report requests are listed with the following details

Detail	Description	Additional Reference
Created on	The date that the report request was first created	
Next Due	When the report will generate next (or if it is not scheduled to generate again, when last generated). By default, the list is sorted according to this date.	*Section 4.7; Selecting the time period and schedule for a report.*
Repeat	The number of times the report has still to run. If no end date for a recurring schedule is set, **Forever** is displayed	
Period	The date range covered in the report	
Format	Either: • **CSV**—if the selected data is for detailed reports only • **PDF**—if the selected data is for summary reports only • **Mixed**—if the selected data is for both summary and detailed reports • **Blank**—if the selected data is not compatible with the selected time period, the report will not be generated. The status will display as an error. For more information on this, see *Section 4.3. About the report data*	*Section 4.6; Selecting the data for a report*
Last Modified By	The name of the user that made the most recent change to the report request. This is usually the user that created the report. This could be the name of your umbrella organization	
Recipients	The number of email addresses the report is set to be delivered to (maximum 5)	*Section 4.8; Setting delivery options for a report.*
Status	Either: • **Requested**—the report has been requested but has not generated yet • **Download**—the report has generated and is available to download • **Generating**—the report is in the process of generating • **Error**—there has been an error in generating the report. Try refreshing the page. Or if the Format column is blank, the selected data and time period may not be compatible (see *Section 4.3., About the report data*). If the status continues to display as an error, please contact clientsupport@hostaccount.com	

Group report requests
You can group report requests according to whether they are active or inactive, or are private or shared. Click the **Activity** or **Privacy** links at the top left of the page. You can expand and collapse the sections.

Sort the report requests
Typically, active report requests are listed with those that are due to generate next first. You can sort the list by any of the columns in the list.

- Click in the column heading to sort by.
- The sort order is changed. An arrow displays the direction of the sort.

Download a report

A report that has generated is available to download. If a report is available, a **Download** link is displayed in the **Status** column of the Report **requests** list.

When you click the **Download** link, you are asked whether to save or open the file. The file is a ZIP file that will contain one or more files, depending on the data components you have selected.

You can download a shared report created by another user. For more information about how you can view a report, see ***Section 4.10. , Viewing a generated report***

Create a new report request

1. Click the **Request a new report** button at the top of the page.
2. Give the report request a name, and click **OK**.
   The name can contain up to 100 characters. Report request names do not have to be unique.
3. Complete steps 1, 2, and 3 in the wizard to define:
   a. The data to appear in the report. See ***Section 4.6. , Selecting the data for a report***
   b. The period to report on. See ***Section 4.7. , Selecting the time period and schedule for a report***
   c. How the report will be delivered and who to. See ***Section 4.8. , Setting delivery options for a report***
4. In step 4, ***Confirm request***, check the summary of your settings. If correct, click **Submit**.
   See ***Section 4.9. Confirming a report request.***

When you have submitted the request, the report generates immediately, unless scheduled it to generate in the future. The report request appears in the list of report requests. The report becomes available to download.

Edit a report request

You can only edit report requests that you have created yourself. You cannot edit a shared report request that another user has created. The name of a shared report request is not an active link.

1. Click the name of the report request to edit.
2. If necessary, edit the report request name.
   The name can contain up to 100 characters. Report request names do not have to be unique.
3. Click **OK**.
   The wizard opens, with the current settings in each step.
4. Navigate to the step in the wizard to make your changes.
5. In step 4, ***Confirm request***, check the summary of your settings. If correct, click **Submit**.

Delete a report request

- Check the box to the left of the report request name and click **Delete**.

You can check multiple boxes to delete multiple requests at the same time.

Copy a report request

A copied (or cloned) report contains the same settings as the requests they were copied from.

1. Check the box to the left of the report request name and click **Clone**.
2. Edit the name of the report request as required, or accept the current name with a version number appended.
   The name can contain up to 100 characters. Report request names do not have to be unique.
3. Click **Submit**.

The cloned reports are added to the **Report requests** list.

You can check multiple boxes to copy multiple requests at the same time.

Rename a report request

1. Check the box to the left of the report request name and click **Rename**.
2. Edit the name of the report request as required.
   The name can contain up to 100 characters. Report request names do not have to be unique.
3. Click **Submit**.

You can check multiple boxes to rename multiple requests at the same time.

Save a report request

The settings you make in a step of the wizard are saved when you navigate to another step in the wizard. However, you must click **Submit** in step 4, ***Confirm request*** for the request to be saved when you navigate elsewhere in ClientNet.

Deactivate a report request

You can deactivate a scheduled report request before the final scheduled date. No more reports will generate in the future (unless reactivated later).

- Click the **Deactivate** link to the right of the report request name, as required

You cannot deactivate a report request while it is in the process of generating.

If a request is not due to generate again, it becomes inactive automatically. You can always change of time period and reactivate it in the future.

For more on active/inactive report requests, see ***Section 4.2.3 , Active and inactive report requests***.

Activate a report request

If you edit the time period of an existing inactive report request so that it is due to generate in the future, the report request will automatically become active.

You can activate a report request that is due to run again in the future, but that you have deactivated.

- Click the **Activate** link to the right of the report request name, as required

For more on active/inactive report requests, see ***Section 4.2.3 , Active and inactive report requests***.

Regenerate a report

If a report is scheduled, it generates automatically according to the schedule set in the ***Time period*** page.

You can generate a report from an existing inactive request—one not already scheduled to run in the future—by editing the time period settings.

1. Click the name of the report request to edit.
2. Click **OK** to accept the request name.
   The wizard opens, with the current settings in each step.
3. In step 2, ***Time period***, ensure the time period to report on is correct. Then either:
   - To generate the report as soon as the request is submitted, ensure the **Schedule** box is not checked.
   - To generate the report in the future, check the **Schedule** box and define the schedule as required.
4. In step 4, ***Confirm request***, check the summary of your settings. If correct, click **Submit**.

4.6. Selecting the Data for a Report

Where?

1. Click **Reports** in the top menu bar, then from the left navigation bar, click **Report Requests**.
2. Select a report to edit or click **Request a new report**, and enter or edit the request name.
3. Go to step **1. Select data**.

How do I filter the data so that I see only the information I want?

You can report on more than one type of service data within a single report request. For example, you may wish to send someone the Email Summary Reports based on the same date and time options, once a month.

1. Check the box next to each report type to include in the report request, as required.

   Summary (PDF) or detailed (CSV) reports are available for each type of service. An audit (PDF) report is also available for Web data. You can select a combination of report types. The options you see depend on your permissions and provisioned services.

   For each selection, further options are displayed.

   - For Summary report data—the components cannot be selected individually. The components that are listed will appear in your report as a variety of tables, charts, and graphs
   - For Detailed and Audit report data—select at least one component for the report
2. **Advanced settings** let you refine the focus of your report by filtering the data further, for example, by domain, group, user, rule, sender, recipient, etc. (depending on the report type).

   The filters you see depend on your permissions.

For more information about the data available for reports, see ***Section 4.3. , About the report data***.

4.7. Selecting the Time Period and Schedule for a Report

Where?

1. Click **Reports** in the top menu bar, then from the left navigation bar, click **Report Requests**.
2. Select a report to edit or click **Request a new report**, and enter or edit the request name.
3. Go to step **2. Reporting period.**

How do I select the time period to report on?

Choose the reporting period according to your requirements, either by:

- Fixed period
- Date range

To start generating a report immediately (as soon as the report request is confirmed), do not check the **Repeat** box.

How do I schedule a report?

Check the **Schedule** box, and select how frequently you wish the report to recur.

To schedule a report to run only once, but on a date in the future, check the **Repeat** box and then select **Once** for the report repeat option. Otherwise, the report will start generating immediately on submitting the report request.

For full details of the reporting period preferences, see below:

<table>
<tr><th colspan="2">Reporting Period Preferences</th><th>Description</th></tr>
<tr><td rowspan="2">Reporting period

NOTE: Full data for the last hour may not be available</td><td>Last</td><td>Select the calendar unit—hours, days, or months—and the number of units for the period to report to cover (e.g. 2 days, 3 months, etc.)</td></tr>
<tr><td>From | To Date</td><td>Enter the From and To dates and times for the duration of the time period to be covered in the report

NOTE: If you select a date range to report on, the report cannot be scheduled to repeat</td></tr>
<tr><td>Schedule</td><td>Frequency of Recurrence</td><td>For the report to generate in the future, select the frequency of recurrence. Choose one of:
Once—then enter the date for the report to run (and time, if appropriate}
Daily—then select either the frequency of days or every weekday for the report to run.
Weekly— then select the frequency of weeks and the day of the week for the report to run on.
Monthly—then select the report to generate on, either:
The day of each month and the frequency of months (e.g. the 3^{rd} of every 2^{nd} month)
The day in context of the month (e.g. 3^{rd} Thursday of every 2^{nd} month)
Yearly—then enter the frequency of years for the report to generate on, and either:
Enter a specific date in each year (e.g. 1^{st} January each year)
Select the day in context of the month and the year (e.g. 1st Monday of September each year)</td></tr>
<tr><td>Until</td><td>Date</td><td>Select an end date for the report to stop being generated, or forever.</td></tr>
</table>

There are limits on the amount of data available for certain reports. For full details, see ***Section 4.3. About the report data*.**

4.8. Setting Delivery Options for a Report

Where?

1. Click **Reports** in the top menu bar, then from the left navigation bar, click **Report Requests**.
2. Select a report to edit or click **Request a new report**, and enter or edit the request name.
3. Go to step **3. Delivery**.

What delivery options are there?

You can either:

- Have the report sent to yourself (and other recipients) as an attachment in an email—when it has generated
- Have an email sent to yourself (and other recipients) containing a link to a secure download area that you log into with your ClientNet login details
- Download a generated report from the **Download** link in the **Status** column to the right of the relevant report request, in the ***Report requests*** page.
-

See also ***Section 4.10. Viewing a generated report***.

You can also:

- Protect the report with a password
- Define the language of the report
- Define the email address that the emails are sent from.

When you confirm the request, you can also:

- Be sent an email to inform you that a report has been delivered.
- Share the report. Other users in your organization will see the report request in the ***Report requests*** page and be able to download the report from the **Download** link.

For further information, see ***Section 4.9. , Confirming a report request.***

For details of the delivery preferences, see below:

Reporting Period Preferences		Description
Report is Available via	An email attachment	The report file(s) will be sent in a ZIP file as an email attachment to the recipients you specify. If the report is estimated to be over 10 MB in size, the report will not be sent via email. Instead, the recipient is sent an email containing a link to a secure download area that they log into with their ClientNet login details. Sending the report via email means that the data in the report could be exposed. If your mail server configuration includes encrypted email delivery, the risk is reduced NOTE: The report will also be available to download from the ***Report Requests*** page.
	An email link to a secure download on ClientNet	The recipient(s) defined below will be sent an email containing a link to a secure download area that they log into with their ClientNet login details. They can then open or save the ZIP file containing the report file(s) NOTE: The report will also be available to download from the ***Report Requests*** page.
	The download link In ClientNet only	The report will only be available to download from the ***Report Requests*** page. This is the default selection NOTE: If you share the report, other users in your organization will be able to download the report too.
Security	Password protect attachment	• Check the box to protect the report with a password. • Enter the password. • There are no restrictions on the password strength for your report. • The ZIP file and any PDF files within it will be password-protected Protecting a ZIP file with a password—and any PDF files within it— should not be regarded as providing total security for the data in the report
Recipient(s)	Add	• Enter the email address for the recipient of the report, and click **Add**.. • The email address is listed, along with a **Remove** option, if required. • Add further recipients as required. Remember to include yourself as a recipient NOTE: Recipients do not need to have permission to view the ***Report requests*** pages, but they do need to have a ClientNet account. NOTE: This option is not available if the **Report is available via the download link in Client- Net only** option is selected (above).
Sent by		Define the email address that the report is sent from: • Choose either the predefined email address or enter an email address of your choice.

4.9. Confirming a Report Request

Where?

1. Click **Reports** in the top menu bar, then from the left navigation bar, click **Report Requests**.
2. Select a report to edit or click **Request a new report**, and enter or edit the request name.
3. Go to step **4. Confirm request**.

How do I check my report request?

The final screen of the wizard shows the information you have entered in each screen and enables you to go back and edit it, if required.

How do I know if a report has been sent to my users?

Check the Dispatch notification box.

Can I share reports I create with other users?

Check the **Sharing** box. Other ClientNet users in your organization will see the request in report requests list. They will be able to download the report, but not edit it.

For full details of the confirmation preferences, see below:

Confirmation preferences	Description
Edit	The selections you have made in each screen are summarized. To edit a selection, click the Edit button. You are taken back to the relevant step in the wizard to make your changes.
Dispatch notification	If you have specified that a report is to be delivered to other users, a notification can be sent to you to confirm that the report has been sent. NOTE: For information on defining recipients for a report, see ***Section 4.8. , Setting delivery options for a report***
Sharing	Reports are either shared or private. By default, report requests that you have created are private to your login. If you have multiple administrators accessing the ***Report requests*** pages, it might be useful to share reports: • To share the report with other user accounts in your organization, check the box • To hide the report request from other users, uncheck the box.

4.10. Viewing a Generated Report

When a report has generated, it is available as a single ZIP file, containing the component CSV and/or PDF files that contain the report data.

When you download and open a document, for example a CSV report, which contains sensitive information, a temporary copy of the file is cached and will remain on your computer after you have finished viewing the document.

How do I see a report that I created?

Once the report has generated, either:

- In the ***Report requests*** page, click the **Download** link in the **Status** column to the right of the relevant report request. Reports are available to download for 28 days.
- If you specified the report to be sent in an email attachment with yourself as a recipient, the report is in the attached ZIP file
- If you specified the report to be sent in an email containing a link to a secure download area that you log into with your Client- Net login details, with yourself as a recipient, click the link in the email, enter your ClientNet login details, and open or save the ZIP file

How do I see a shared report that I did not create?

Once the report has generated:

- In the ***Report requests*** page, group the report requests by **Privacy**, and click the **Download** link in the **Status** column to the right of the relevant report request. Open or save the ZIP file

How do I see a report that I did not create but I am specified as a recipient?

Once the report has generated, either:

- The report is sent to you in an email attachment
- The report is available via a link in an email. Click the link, enter your ClientNet login details, and open or save the ZIP file as required

For information on defining delivery options for reports, see ***Section 4.8. , Setting delivery options for a report.***

5 Managing ClientNet Users and Domains

You can manage your ClientNet users and your domains within the ***Administration*** tab of ClientNet. The main administrative area is:

- **User Management** – View, add, edit or delete Administrator users and their permissions

5.1. Defining a ClientNet User

ClientNet users are those users who are delegated one of several roles that give them various levels of permission to carry out administrative tasks in ClientNet. For full details of the roles and their permissions, see ***Section 5.3. , Managing roles***.

To define a ClientNet user

1. Select **Administration > User Management**.
2. Click **Create new user**.
3. Enter the user's full name (required), login name (required), and email address (required).
   All ClientNet users must have a unique login name, so an email address is recommended.
4. Enter a password for the user (required).
   The new password must be at least eight characters long and contain alphabetic, numeric, and symbol characters. The ClientNet user is prompted to change this password when they next log in to the system. Their new password will not be visible to any other user.
5. Select the **Preferred language** that ClientNet displays in.
6. Ensure the **User is enabled** button is set to **Yes**.
   Setting this option to **No** disables the account. When the user has been created, this setting can be used to prevent future access to ClientNet for this account, without deleting the user altogether.
7. Select the appropriate option button to define whether **User can manage other users**.
   Setting this option to **Yes** provides the user with the permissions to create new ClientNet users and to manage existing users, including assigning new passwords to other users.
8. Click **Save and Exit**.
   The new user is added to the list of authorized ClientNet users. Currently, the new user has no roles allocated to them. For more information on allocating roles, see ***Section 5.3. , Managing roles***.

5.2. Managing ClientNet Users

The primary login account is the default ClientNet administrator account that you are given when provisioned with MailStreet Boundary Defense for Email services. This account has permission to configure all provisioned services, create new users, and define user roles. To prevent accidental deletion of all ClientNet users, this primary account cannot be deleted.

We recommend that you set up all of your users with named accounts, and only use the primary login account as a default account to ensure that there is always an account that has full permissions.

For information on managing users' roles, see ***Section 5.3. , Managing roles***.

To View Existing ClientNet Users:

1. Select **Administration > User Management**.
   - The names of the ClientNet users you manage and their logins are listed. Use the search facility or the navigation buttons to locate the required user.
2. To view and edit more details of the user, including their roles, click the user's name.

To Delete a ClientNet User:

1. Select **Administration > User Management**.
2. Select the user to delete by ticking the checkbox to the left of their name.
3. Click **Delete selected**.

To Edit a ClientNet User's Details:

1. Select **Administration > User Management**.
2. Use the search facility or the navigation buttons to locate the required user.
3. Click the user's name.
   a. The details of the user are displayed (see ***Section 5.1. ,Defining a ClientNet user***.)
4. Edit the details as appropriate.
5. Click **Save and Exit**.

For full details on defining a user, see ***Section 5.1. Defining a ClientNet user.***

5.3. Managing Roles

Assigning a role to a user gives permissions to view and configure certain areas and settings in ClientNet.

A **Standard role** enables you to grant access to all or a subset of settings in ClientNet. See ***Section 5.3.1, Standard roles***.

A **Custom role** enables you to define more precisely the areas of ClientNetthat a user can access, including making change requests to your provisioned setup. See ***Section 5.3.2, Custom** roles*.

5.3.1 Standard Roles

Defining a standard role for a user enables you to grant permission to view and, where applicable, edit settings in specific areas of ClientNet.

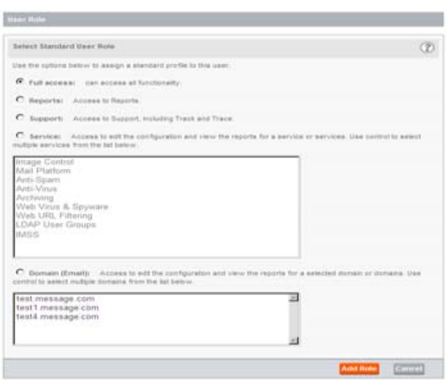
A user can be assigned more than one role. The following standard roles are available:

Standard Role	Enables the User to:
Full Access	• View and edit configurations, generate reports, and view dashboards for all of your services and domains. • Access the Administration screens to manage users and make change requests
Reports	• View dashboards and generate reports for all of your services and domains. • The user will not see the Configuration and Administration sections of ClientNet. • The user will only see the Contact Support page in the Support section.
Support	• Access all of the Support pages. • The user will not see the Configuration, Administration, and Reports sections of Clientnet.
Service	• View and edit configurations and generate reports for all provisioned domains for the service(s) selected from the list. • The user will not see the Administration section of ClientNet. • The user will only see the Contact Support page in the Support section
Domain (Email)	• View and edit configurations and generate reports for all provisioned services for the domains selected from the list. • The user will not see the Administration section of ClientNet NOTE: This option only affects Email Services.

To grant permissions for a user to request changes to your provisioned domains, to use the Track and Trace feature, to raise support tickets, etc., you can assign a custom role. For full details, see ***Section 5.3.2, Custom roles***.

To define a standard role for a ClientNet user:

1. Select **Administration > User Management**.
2. Select an existing user to allocate a role for (or create a new user).
3. Click the ***User roles*** tab.
4. Click **Use standard role**.



5. Select the role type to apply for this user; one of:
6. Click **Add role**.
   The role is listed in the ***User roles*** tab.

5.3.2 Custom Roles

Defining a custom role for a user enables you to grant permission to view and edit configurations, statistics, and areas of ClientNet, and to raise change requests.

Custom roles can be applied for all or specific services and/or domains.

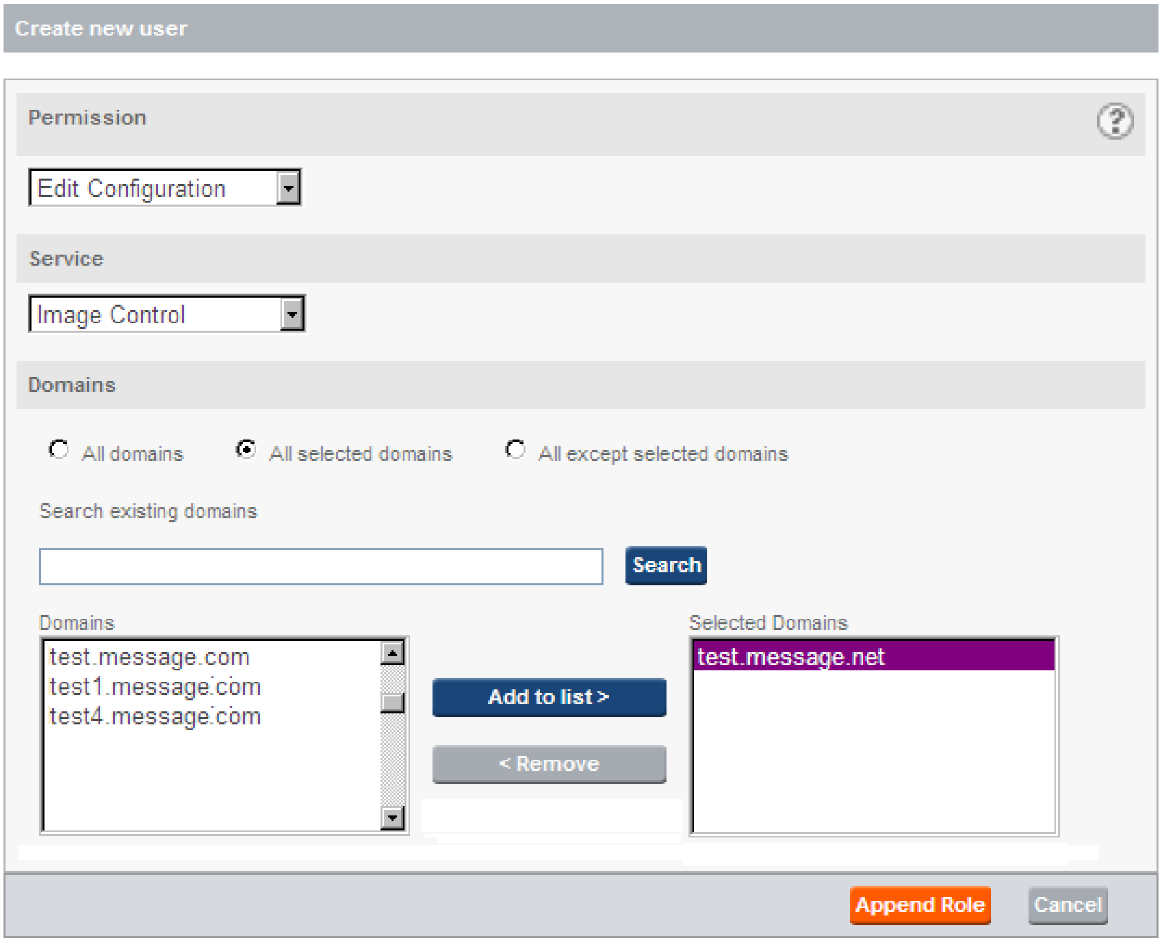
Domain settings do not apply for some roles and some services.

A user can be assigned more than one role. The following roles are available

Custom Role	Enables the User to:
View Statistics	• View the dashboards and generate reports for the selected services. • The user will not see the Configuration and Administration sections of ClientNet • The user will only see the Contact Support page in the Support section
View Configuration	• View the current configurations settings for the selected services; no changes can be made. • The user will not see the dashboards and the Reports and Administration sections of ClientNet. • The user will only see the Contact Support page in the Support section.
Edit Configuration	• Edit the configuration settings for the selected services. NOTE: To edit configuration settings, the user requires both the **View Configuration** and **Edit Configuration** roles. • The user will not see the dashboards and the Reports and Administration sections of ClientNet • The user will only see the Contact Support page in the Support section.
Request Changes	• In the Administration section, request domain, user, contact list, and address changes. • The user will not see the dashboards and the Configuration and Reports sections of ClientNet, nor the dashboards. • The user will only see the Contact Support page in the Support section.
Raise Tickets	• Raise support tickets in the Ticketing page of the Support section. • The user will not see the dashboards and the Configuration, Administration, and Reports sections of ClientNet. • The user will only see the Ticketing, and Contact Support pages in the Support section.
Track and Trace	• Perform a search for an individual email on behalf of other people in the organization via the track and Trace feature in the Support section. NOTE: This role is only visible if your organization is provisioned to use Track and Trace. • The user will not see the dashboards and the Configuration, Administration, and Reports sections of ClientNet. • The user will only see the Track and Trace and Contact Support pages in the Support section.
View Service Alerts	• View the Service Alerts page in the Support section. • View the Contact Support page in the Support section. • The user will not see the Configuration, Administration, and Reports sections of ClientNet.
View Support Content	• View the Online Help page in the Support section. • View the Contact Support page in the Support section. • View the Support Content Area in the Support section. • The user will not see the Configuration, Administration, and Reports sections of ClientNet.

To Define a Custom Role for a ClientNet User:

1. Select **Administration > User Management**.
2. Select an existing user to allocate a role for (or create a new user).
3. Click the ***User roles*** tab.
4. Click **Create custom role**.



5. Select the role to apply for this user from the drop-down list in the ***Permission*** section.
6. Select the service to apply the permissions for from the drop-down list in the ***Service*** section.
7. To apply the permission to:
   - All domains, select **All domains**.
   - Selected domains, select **All selected domains**, select the domain(s) to apply the role to, and click **Add to list**.
     - In some circumstances it is useful to exclude domains from the selected domains list. To do so, select the domain(s) to exclude from the role and select **All except selected domains**
8. Click **Append Role**
   - The role is applied for the user.

Selecting services and domains is not appropriate for certain roles. If any of these are selected, the ***Service*** and ***Domains*** section is inactive.

Selecting domains is not appropriate for certain services. If any of these are selected, the ***Domains*** section is inactive

5.4. Changing Your Password

Passwords must be at least eight characters long and contain alphabetic, numeric, capital letters, and symbol characters

To Change Your ClientNet Password:

1. Select the **My Profile** link at the top of any page of ClientNet.
2. In the **My details** section, select the **Create new password** option button.
3. Enter your current password.
4. Enter and confirm your new password.
   - The new password must be at least eight characters long and contain alphabetic, numeric, capital letters, and symbol characters.
5. Click **Save and Exit** or **Submit**.
   - Confirmation that your password has been changed is displayed.

Authorized ClientNet users who have the **Can manage other users** option set to **Yes** can reset passwords for other ClientNet users (see ***Section 5.1. , Defining a ClientNet user***).

**********   End of MailStreet Boundary Defense for Email: ClientNet Admin Guide ********