

LEGEND FOR MENU NAVIGATION

Menu | Structure [Buttons] **Tab or Sub-Tab** Hyperlink **Column Name, Drop-Down Menu, Checkbox etc.** *Instruction*

ClientNET PORTAL

FEATURE	MENU NAVIGATION QUICK REFERENCE	COMMENT
Log In to ClientNet	Hosting Boundary Defense for Email Log-in to control panel <i>Enter your Admin login credentials</i>	Access ClientNet through the MailStreet Control Panel: https://cp.mailstreet.hostaccount.com . The admin credentials can be found above the Log-in to control panel link of the MailStreet CP
Log Out of ClientNet	[Log Out]	You can Log Out of ClientNet from any screen. The [Log Out] button is at the top left of the screen.
Navigation within ClientNet	<ul style="list-style-type: none"> Click on the TABS across the top of the Home page to access the main sections of ClientNet. Use the navigation menus on the left to access features within a section of ClientNet 	Language support is also available from the drop-down menu at the top of any screen.
Setting SMS Alerts	Support SMS Alerts: <i>Enter up to five (5) telephone numbers to receive SMS alerts. >> Determine the domain(s), or Global from the Global Settings drop-down</i> [Save and Exit]	SMS alerts may be received when there are any critical announcements (Ex: delays in service). Include the country and area codes when entering phone numbers.
Dashboards > Change domain to view	Home > Dashboards Show All Domains > <i>Select an option from the pop-up list</i> <i>The Dashboard updates to reflect your choice</i>	The pop-up lists for domains/time range are located at the bottom of the Dashboard. Use this feature to select the desired domain(s) to review.
Dashboards > Change time range of data to view	Home > Dashboards View Data From > <i>Select an option from the pop-up list</i> <i>The Dashboard updates to reflect your choice</i>	Use this feature to select the date range for viewing Dashboard information.
Generate a Summary Report	Reports Email Service Reports Summary Reports <i>Select the date range</i> <i>Select the domain(s) from the drop-down list</i> [Generate Report]	The Summary Report may take several moments to run. It is displayed in a new window as a PDF document that can be saved to your PC.
Generate a detailed report	Reports Email Service Reports Detailed Reports <i>Select the report type</i> <i>Select the date range</i> <i>Customize the report to your requirements</i> [Generate Report]	Data for detailed reports is available for the last 30 days.
Schedule a report	Reports Email Service Reports Scheduled Reports <i>Use the Tabs to manage the settings to define the scheduled reports</i>	See Page 14 of the ClientNet Admin Guide for details on the types of Scheduled Reports for Email Security Services.
REPORTS TABLE—Process Overview Table	Table provides overview, and explanation of how to utilize the Reports process in ClientNet	See Page 18 of the ClientNet Admin Guide.
REPORTS TABLE—Features & benefits of Reports	Table lists how reports are useful to your organization	See Page 22 of the ClientNet Admin Guide.
REPORTS TABLE—Report request input field details	Table lists the report request input fields details and descriptions.	See Page 24 of the ClientNet Admin Guide.
Create a new report request	Reports Report Requests [Request a new report] <i>Give the report a name</i> [OK] <i>Complete wizard</i> [Submit]	When you submit the request, the report generates immediately, unless scheduled to generate in the future.
Edit a report request	Reports Report Requests <i>Click on the name of the report request to edit</i> [OK] <i>Edit the steps in the wizard as needed</i> [Submit]	You can only edit report requests that you have created yourself.

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Delete a report request	Reports Report Requests Check the box to the left of the report request name [Delete]	You can check multiple boxes to delete multiple requests at the same time.
Copy a report request	Reports Report Requests <i>Check the box to the left of the report request name</i> [Clone] <i>Edit the name as needed</i> [Submit]	A copied report contains the same settings as the requests they were copied from. You can check multiple boxes to copy multiple requests at the same time.
Rename a report request	Reports Report Requests <i>Check the box to the left of the report request name</i> [Rename] <i>Edit the name as needed</i> [Submit]	You can check multiple boxes to rename multiple requests at the same time.
Deactivate a report request	Reports Report Requests Deactivate	You cannot deactivate a report request while it is in the process of generating a report.
Activate a report request	Reports Report Requests Activate	You can activate a report request that is due to run again in the future, but that you have deactivated. 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.
Regenerate a report	Reports Report Requests <i>Click on the name of the report request to edit</i> [OK] <i>Edit step 2 in the wizard as needed</i> [Submit]	You can regenerate a report from an existing inactive request by editing the time period setting.
Selecting the data for a report	Reports Report Requests <i>Click on the name of the report request to edit or click</i> [Request a new report] <i>Step 1 of the wizard allows you to Select data.</i>	You can also filter the data using the Advanced settings options.
Selecting the time period and schedule for a report	Reports Report Requests <i>Click on the name of the report request to edit or click</i> [Request a new report] <i>Step 2 of the wizard allows you to identify Reporting period.</i>	To start generating a report immediately, do not check the Repeat box.
REPORTS TABLE—Reporting period preferences	Table provides description of various reporting periods available for creating Reports.	See Page 28 of the ClientNet Admin Guide.
Setting delivery options for a report	Reports Report Requests <i>Click on the name of the report request to edit or click</i> [Request a new report] <i>Step 3 of the wizard allows you to define Delivery.</i>	See Page 30 of the ClientNet Admin Guide for the table defining various delivery options.
REPORTS TABLE—Delivery preferences	Table provides description of various delivery options available for creating Reports.	See Page 30 of the ClientNet Admin Guide.
Confirming a report request	Reports Report Requests <i>Click on the name of the report request to edit or click</i> [Request a new report] <i>Step 4 of the wizard allows you to Confirm request.</i>	The final screen of the wizard shows the information you have entered in each screen and enables you to go back and edit the report request if required.
Viewing a generated report	Reports Report Requests Status: Download <ul style="list-style-type: none"> If you specified the report be sent in an email attachment, the report is in the attached ZIP file. If you specified the report be sent to a secure download area via ClientNet, click the link in the email and enter your ClientNet login details to open or save the ZIP file. 	When a report has generated, it is available as a single ZIP file, containing both the component CSV and/or PDF files that contain the report data. Reports are available for download for 28 days. <ul style="list-style-type: none"> See additional details on page 32 of the ClientNet Admin Guide.

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ClientNet PORTAL (Continued)

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Defining a ClientNet User	Administration User Management [Create new user] <i>Enter the user information</i> <i>Enter a password for the user (required)</i> Ensure User is Enabled is Yes <i>Select option for User can manage other users</i> [Save and Exit]	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.
Viewing/Editing ClientNet Users	Administration User Management <i>Use the SEARCH facility or the navigation buttons to locate the required user.</i>	To view and edit more details of the User, including their roles, click on the User's name, edit as needed and then click [Save and Exit] .
Delete a ClientNet User	Administration User Management <i>Select the user to delete by clicking the checkbox to the left of their name</i> [Delete selected]	The administration role assigned to this user is removed.
Define a standard role for a ClientNet User	Administration User Management <i>Select an existing User (or create a new User)</i> User roles Use standard role <i>Select the role type for this User</i> [Add role]	The selected role is listed in the User roles tab for this User
Define a Custom Role for a ClientNet User	Administration User Management <i>Select an existing User (or create a new User)</i> User roles [Create custom role] <i>Select the role to apply to the User from the drop-down list in the Permission section</i> <i>Apply to the proper domain(s)</i> [Append Role]	A User can be assigned more than one role. A table of the various Custom Roles, and their functions, can be found on Page 36 of the <i>ClientNet Admin Guide</i> .
Change Your ClientNet Password	My Profile My Details > [Create new password] <i>Enter your current password</i> <i>Enter and confirm your new password</i> [Save and Exit] or [Confirm]	Passwords must be at least eight characters long and contain alphabetic, numeric, capital letters, and symbol characters.