

LEGEND FOR MENU NAVIGATION

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

CONTENT CONTROL

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.
Access the Content Control configuration settings	Configuration Email Services Configuration Content Control	Four (4) Tabs are displayed: Rules, User Groups, Lists; Settings . All Content Control configuration settings listed below are accessed from this section of ClientNet.
Overview of the Configuration process	<i>Use rules to enforce your organizations security policy</i>	See table on page 6 of the Content Control Admin Guide for an overview of the process for creating a set of rules.
Apply settings for a specific domain	Global Settings: Select a domain Apply custom settings button	The rules, groups, lists and settings that you can apply at a domain level are now editable.
Applying global settings	Global Settings: Global Settings 	The four tabs are displayed and entries made in these tabs are applied globally.
Define a general administrator email address	Settings Administrator Email Address: Enter the required email address [Save]	This specifies the default email account to which notifications and redirected emails are sent.
Defining a notification "Sent From" address	Settings Notification 'sent from' address: Enter an email address to be used [Save]	A default email address has been inserted for sending notifications only. If you want to receive replies on this address you will need to create the associated mailbox to match the 'sent from' address.
Defining a default time zone	Settings Default Time Zone: Select from drop-down list [Save]	This defines the time zone that is applied by default when generating conditions based upon time intervals.
Define default notifications	Settings Default administrator/sender/recipient notification (as required): Use custom notification <i>Enter the text required for subject line and body of the email</i> [Save]	<i>Placeholder</i> options enable you to enter variables into the email. See page 15 of the Content Control Admin Guide for placeholder details.
Define default subject line tag text	Settings Subject line text: Enter text <i>Select an option button for placement of text</i>	The default text for the subject line tag is "unacceptable content"
View members of a custom user group	User Group Group name: Click on the name of the group to view the members Edit User Groups: Use Email Address search box to display the members.	Up to 500 groups are displayed at a time. Use Group name and Group Type filters to reduce the list displayed.
Creating a custom user group for email content control	User Group Create New Group <i>Enter a name for the group Search for existing users as needed</i> [Add] [Save]	This is useful to add users who do not send emails, ie. Whose addresses are not harvested, and for external email addresses.
Create a new user for a custom group	User Group Group name: Click on the name of the group to view the members New users: add a new email address [Save]	

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Delete a custom user group	User Group <i>Select the checkbox(es) next to the name of the group to delete</i> [Delete selected group(s)] [Save]	You cannot delete a user group if it is in use in a rule.
Delete a user from a custom user group	User Group <i>Select the checkbox next to the name of the group that contains the user to delete</i> [Delete users] <i>Locate an existing user and highlight the required user</i> [Delete] [Delete users]	Deleting a user from a group does not permanently delete the user, but merely removes it from the user group, or groups, that it is associated with.
Download a list of users in a custom user group	User Group <i>Locate the name of the group to download</i> [Download]	This downloads a CSV file that can be edited and uploaded back to ClientNet
Upload a list of users for a custom user group	User Group <i>Locate the name of the group to receive the upload</i> [Upload] Select file to upload: Browse... [Upload] [OK]	The file to upload must be a CSV file.
Viewing Your Lists	Lists <i>The list that you can modify (global or domain) are displayed.</i>	View table on Page 24 of the Content Control Admin Guide for information on valid and invalid characters.
Seeing the Rules that use a specific list	Lists In Use: <i>Located the list and click the hyperlink</i>	
Creating a List	Lists [Create new list] <i>Enter a name for the list</i> > Ordinary list Select list type List items: <i>enter the items for the list</i> [Save]	List names must be unique, only contain alphanumeric characters, being with an alphabetic character, and not exceed 50 characters.
Creating a Superlist	Lists [Create new list] <i>Enter a name for the superlist</i> > Super List Select list type List items: <i>enter the list for the superlist</i> [Save]	A superlist is a list that contains multiple lists of the same type. The functionality to add multiple lists into a SuperList enables, for example, lists of profanities in English, German and French to be gathered into a European profanity Super List. Changes made to the list contained in a Super List are updated in the Super List.
Edit a list	Lists List name: <i>locate the list to edit and click on its name</i> List items: <i>edit the items as required</i> [Save]	You can edit the name of a list and the items within it. However, you cannot change the list type.
Deleting a list	Lists <i>Select the checkbox(es) next to the list to delete</i> [Delete selected list(s)]	You can only delete a list if it is not used in any rule. Also, you cannot delete any default/pre-defined lists.
Viewing your rules	Rules <i>The rules that are available for modification at the level you have selected (global or domain) are displayed</i>	You can use this page to copy a rule to another domain, move a rule up or down the scan order, or deactivate a rule temporarily.
View the summary of a rule's conditions	Rules <i>Click the name of the rule</i> Summary	The conditions of the rule are set out so that you can see all of the conditions of the rule in an easy-to-read format.
Delete a rule	Rules <i>Select the checkbox to the left of the rule to delete</i> [Delete selected]	Instead of deleting a rule, if you think you may need to use the rule in the future, you can deactivate the rule.
Copy a rule	Rules <i>Select the checkbox to the left of the rule to copy</i> [Copy selected] <i>Use the option buttons to define the copy properties</i> [Save]	You can copy a rule to the same domain, to another domain, or to a global list so that it applies to all domains. Only one rule can be copied at a time.
Edit a rule	Rules <i>Click on the name of the rule to edit</i> <i>Navigate to the relevant Tabs to edit as required</i> [Save and exit]	You can edit a rule's name and any of the conditions and other settings for a rule.

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Activating and deactivating a rule	Rules <i>Locate the required rule</i> [Activate] or [De-active]	Use this feature instead of deleting a rule if you think the rule may be used in the future.
Move a rule	Rules <i>Select the checkbox to the left of the rule to move</i> [Move selected] <i>Use the drop-down list of the existing rules in order > Select the position to move the selected rule above</i> [Save]	The list of rules is displayed with the rule in its new position. Rules run in the sequence listed.
Define a rule	Rules [Create new rule] <i>Enter a rule title</i> Use the <i>Apply to option buttons as required</i> > Use the settings in each Tab to define the rule [Save and Exit]	You can navigate between the Tabs without saving the changes you make in an individual Tab. The [Save and exit] button affects all of the rules Tabs collectively.
Define any or all conditions within a tab	Rules <i>Click the name of the required rule</i> <i>Select the appropriate option button within the Tab</i>	Use this option to define whether all or any of the conditions defined within a Tab must be met to trigger the rule.
Define any or all conditions between tabs	Rules <i>Click the name of the required rule</i> Summary Rule Summary: <i>Select the appropriate option button within the Tab</i>	Use this to determine if All or Any of the Tabs conditions must be met to trigger a rule.
Define sender conditions using user groups	Rules <i>Click the name of the rule or click</i> [Create new rule] Sender User groups: Use user groups in this rule <i>Select the appropriate option button</i> [Add Group] <i>Locate and select the group to use in the rule</i> [Add Selected] [Save and exit]	For an email content control rule to apply to specific senders and recipients (rather than all senders and recipients) use the Sender and Recipient Tabs when creating a rule.
Define recipient conditions using user groups	Rules <i>Click the name of the rule or click</i> [Create new rule] Recipient User groups: Use user groups in this rule <i>Select the appropriate option button</i> [Add Group] <i>Locate and select the group to use in the rule</i> [Add Selected] [Save and exit]	
Define sender conditions using domain lists	Rules <i>Click the name of the rule or click</i> [Create new rule] Sender Domain lists: Use domain lists in this rule <i>Select the appropriate option button</i> Select a list of domains > Select an existing list or select <Custom List> to enter your own domain entries for the rule [Save and exit]	
Define recipient conditions using domain lists	Rules <i>Click the name of the rule or click</i> [Create new rule] Recipient Domain lists: Use domain lists in this rule <i>Select the appropriate option button</i> Select a list of domains > Select an existing list or select <Custom List> to enter your own domain entries for the rule [Save and exit]	
Define the parts of the email to scan	Rules <i>Click the name of the rule or click</i> [Create new rule] Email Content Rule Conditions: <i>Select the appropriate checkboxes as required</i> [Save and exit]	The subject line is also a header, so when this option is selected the rule also scans the subject for the specified content.
Define email attribute conditions	Rules <i>Click the name of the rule or click</i> [Create new rule] Email Content Email attributes: <i>Select the option button as required</i> [Save and exit]	
Define text content conditions	Rules <i>Click the name of the rule or click</i> [Create new rule] Email Content Text content: <i>Select the option button as required</i> [Save and exit]	

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Define URL content conditions	Rules <i>Click the name of the rule or click [Create new rule] Email Content URL lists: Select the option button as required [Save and exit]</i>	
Define email MIME type conditions	Rules <i>Click the name of the rule or click [Create new rule] Email Content Email MIME types: Select the option button as required [Save and exit]</i>	This relates to the MIME type of the actual email, not the MME types of attachments.
Define email template conditions	Rules <i>Click the name of the rule or click [Create new rule] Email Content Email templates: Select the option button as required Select a list of templates [Save and exit]</i>	Boundary Defense for Email provides a pre-defined list of templates that enable you to monitor and control specific alphanumeric characters in a set format (ex: credit card numbers, etc.).
Define attachment attribute conditions	Rules <i>Click the name of the rule or click [Create new rule] Attachment Select the option button as required [Save and exit]</i>	Zipped archive and MS Office attachments are also scanned.
Define attachment filename conditions	Rules <i>Click the name of the rule or click [Create new rule] Attachment Attachment file names: Select the option button as required [Save and exit]</i>	
Define attachment file type conditions	Rules <i>Click the name of the rule or click [Create new rule] Attachment Attachment types: Select the option button as required [Save and exit]</i>	
Define time interval conditions	Rules <i>Click the name of the rule or click [Create new rule] Time Intervals Use time intervals: Checked > Select the option button as required <i>Optionally specify time zone other than default Enter required times in From this time and To this time values Select the required checkboxes to apply the time interval on the required days of the week [Add to selected]</i></i>	You can define conditions based on the time that an email is sent or received. This is useful, for example, to limit email size in order to retain network bandwidth during the working day.
Define an action for a rule	Rules <i>Click the name of the rule Actions and Notifications Select the action as required from the drop-down list [Save and exit]</i>	For each rule, you must define an action for the email detected by the rule. For each action you can also define an appropriate notification to be sent to the email admin, the sender, and/or the recipient.
Define a rule-specific administrator email address	Rules <i>Click the name of the rule Actions and Notifications Either: 1) Use the default administrator email address, or 2) Use a specific administrator email address [Save and exit]</i>	This setting allows the appropriate personnel to review the triggered email.
Define notifications for a rule	Rules <i>Click the name of the rule or click [Create new rule] Actions and Notifications In each section use the option buttons to define notification settings [Save and exit]</i>	To define custom notifications enter the Subject line and Body text . The placeholder options enable you to enter variables as part of the notification.
Define a subject line tag for a rule	Rules <i>Click the name of the rule or click [Create new rule] Actions and Notifications Subject line text: Enter one of the available options Select an option button depending on whether to put the text before or after the existing subject line text [Save and exit]</i>	Specifying <i>Tag subject line</i> as an action for detected email enables an email to continue to its intended path but provides the recipient with a warning that it may contain inappropriate content.
Frequently Asked Questions		See pages 49 – 51 of the Content Control Admin Guide for an overview of Frequently Asked Questions (FAQs)