proofpoint essentials

# Getting Started Guide

## Proofpoint Essentials

Hi and welcome to Proofpoint Essentials! If this is your first time using Proofpoint Essentials, here's a great way to start. We'll walk you through the essential first steps so your team can work efficiently and productively in the system.

*January 2017*

# Important Information

The following information applies to Proofpoint Essentials US2 data center only.

| | |
|---|---|
| ***User Interface Access*** | • https://us2.proofpointessentials.com |
| ***MX Records*** | • mx1-us2.ppe-hosted.com<br>• mx2-us2.ppe-hosted.com |
| ***Proofpoint Essentials IP Addresses***<br><br>*Proofpoint Essentials must be able to deliver email to the organization mail environment. It will be necessary for exceptions to be added to the firewall for these IP addresses.*<br><br>*Port 25 for SMTP Traffic*<br>*Port 389 for LDAP (If using Active Directory to load users)* | • 67.231.152.0/24<br>• 67.231.153.0/24<br>• 67.231.154.0/24<br>• 67.231.155.0/24<br>• 67.231.156.0/24<br>• 67.231.144.0/24<br>• 67.231.145.0/24<br>• 67.231.146.0/24<br>• 67.231.147.0/24<br>• 67.231.148.0/24<br>• 148.163.128.0/19 |
| ***Additional IPs Addresses (For Customers using Archiving)***<br><br>*Ports 143 & 993 for IMAP* | • 50.19.242.23<br>• 46.51.173.223 |
| ***Smart Host*** | • outbound-us2.ppe-hosted.com |
| ***SPF*** | • "v=spf1 a:dispatch-us.ppe-hosted.com ~all" |

# About

This document contains specific information related to accessing and configuring Proofpoint Essentials. For additional information please refer to the Proofpoint Essentials Administrator Guide.

# Getting Access

You should already have received Proofpoint Essentials login information. If you do not have this information, please contact your partner.

## Sign in to the Proofpoint Essentials Interface as an Admin

1. Open an Internet browser on your computer and enter the interface URL
2. Login using your supplied credentials
    - Enter your username (This will be your email address)
    - Enter your password (Use the password supplied in the welcome email)

## Update Your Password

1. Click on *Users & Groups*
2. Click on *Users*
3. Locate your account by name in the list
4. Click on your **Name**
5. Enter a new password in the Password and Retype Password fields
6. Click on **Save**

*Your password is set. You must use this password the next time you log in to the user interface.*

## Review Company Setup

1. Click on *Company Settings*
2. Click on *Profile*
3. Click on **Change Profile Information**
4. Ensure that all fields are populated with accurate information (e.g. Country, Time zone, etc.)
5. Click on **Save**

# Configure / Add Domain

## Update Domain

1. Click on *Company Settings*
2. Click on *Domains*
3. Click on the **edit icon** next to the domain you wish to edit
4. Update the domain name
5. Change the domain purpose (Optional)
6. Enter the destination IP address or hostname for the domain
7. Enter the failover IP address or hostname for the domain (Optional)
8. Choose the method you wish to use for domain verification

*Verify by TXT record: Verify domain by adding a DNS (TXT) record to your domain's configuration*

*Verify by META Tag: Verify domain by adding a custom META tag to the homepage of your domain*

### To verify domain by adding a DNS (TXT) record to your domain's configuration

1. Choose "Verify by TXT record" from the verification method list
2. Copy the value displayed on the screen (i.e., ppe-7c123438b96cd00aa17e)
3. Click on **Verify Later**
4. Open a new tab or browser window
5. Login to your DNS provider's website
6. Go to your provider's domain management window – this may be called DNS Settings, Control Panel, Advanced Settings, etc.
7. Add a new entry to your DNS
    - Type = TXT
    - Host = @
    - Value/Answer/Definition = Paste value from clipboard
    - TTL = 3600 seconds / 1 hour
8. Ensure that you save the change
9. Return to Proofpoint Essentials
10. Click on the Edit icon next to the domain you wish to verify
11. Click on **Verify Now**
12. Confirm that the verification status value associated with the domain is verified

### To verify domain by adding a custom META tag to the homepage of your domain

1. Choose "Verify by META tag record" from the verification method list
2. Copy the value displayed on the screen (i.e., <meta name="ppe-verify" content="ppe-f01321e1e822fcd1e7a8">)
3. Click on **Verify Later**
4. Open a new tab or browser window
5. Open your website homepage HTML file using any text or HTML editor
6. If your web host uses a web-based page editor (i.e., WordPress, Squarespace, etc.), open your homepage in their editor
7. Paste the content from your clipboard into the <head> section that's before the first <body> section
    - If you're unsure how to add meta tags with a web-based page editor, contact your web host's technical support team
8. Open your website homepage in a browser and view the source to confirm the content has been added
9. Return to Proofpoint Essentials
10. Click on the **Edit icon** next to the domain you wish to verify
11. Click on **Verify Now**
12. Confirm that the verification status value associated with the domain is verified

Once you save the changes, Proofpoint Essentials will attempt to validate the information you have added including MX records and access to the specified messaging server.

*New domains as well as changes to existing domains are applied every half-hour.*

### Add New Domain

1. Click on *Company Settings*
2. Click on *Domains*
3. Click on **New Domain**
4. Enter the domain name
5. Change the domain purpose (Optional)
6. Enter the destination IP address or hostname for the domain
7. Enter the failover IP address or hostname for the domain (Optional)
8. Choose the method you wish to use for domain verification
9. Choose the method you wish to use for domain verification

   *Verify by TXT record: Verify domain by adding a DNS (TXT) record to your domain's configuration*

   *Verify by META Tag: Verify domain by adding a custom META tag to the homepage of your domain*
10. Click **Verify Now** or **Verify Later**

*New domains as well as changes to existing domains are applied every half-hour.*

## Loading Users

Once your subscribed domains are accurate you should now import your users. Proofpoint Essentials allows organizations to load users in several ways:

1. Active Directory Sync
2. Azure Active Directory Sync
3. CSV Import
4. SMTP Discovery
5. Manual

### Active Directory Sync

Customers who use Active Directory can sync users and groups directly with Proofpoint Essentials. This will allow you to import:

- Active users (including both primary email address and user aliases)
- Distribution Groups
- Security groups

*To configure Active Directory sync, please refer to the Administrator Guide.*

### Azure Active Directory Sync

Customers hosted on Office 365 may prefer to use Azure Active Directory to sync users and groups to Proofpoint Essentials. This will allow you to import:

- Active users (including both primary email address and user aliases)
- Distribution Groups
- Security groups

*To configure Azure Active Directory sync, please refer to the Administrator Guide.*

## Adding Users by CSV

1. Click on *Company Settings*
2. Click on *Import Users*
3. Click on *CSV*
4. Select the CSV file format

*To view a sample format of the file you have selected click CSV file format instructions.*

5. Select the initial profile of the users you are loading.

*End Users receive a welcome letter once loaded into the system. The welcome letter will include details about the quarantine email as well as login information to access the user interface.*

*Silent Users do not receive a welcome letter when loaded into the system. Their profile can be changed (i.e. to an end user) at a later stage.*

6. Click on **Choose File**
7. Locate the file you wish to import
8. Click on **Upload**

A validation page will appear displaying the results (success, failures) from the CSV import. Users that have already been created will not be overwritten but will be indicated as an error (duplicate).

## Adding Users by SMTP Discovery

1. Click on *Company Settings*
2. Click on *Features*
3. Ensure SMTP Discovery is checked
4. If it is not checked, check the checkbox
5. Click on **Save**
6. Click the *SMTP Discovery*
7. Select the initial profile of the users that are created

*End Users receive a welcome letter once loaded into the system. The welcome letter will include details about the quarantine email as well as login information to access the user interface.*

*Silent Users do not receive a welcome letter when loaded into the system. Their profiled can be changed (i.e. to an end user) at a later stage.*

8. Update SMTP Discovery settings based on preferences

*Inbound Detection Threshold: The number of times Proofpoint Essentials should see this email address before including it in the SMTP Discovery weekly digest.*

*Expiration: The number of times the address should appear in the SMTP Discovery weekly digest before expiring.*

*Expired Addresses Default to New User: When enabled will automatically make an address a licensed user once inbound detection and expiration settings have been met.*

*Auto-add Detected Alias Addresses: Will automatically add an address as an alias when identified.*

*Auto-add New Users Detected via Outbound: If the organization is filtering outbound email through Proofpoint Essentials, than this setting will automatically create licensed users for non-registered accounts.*

*Report on New Users: Will deliver a report to the organization administrator identifying new users that have been automatically created.*

*Report on New Aliases: Will deliver a report to the organization administrator identifying new aliases that have been*

*automatically added.*

*Include Admin Contact: Will include the admin contact in the report.*

9. Click on **Save**

### Manually Add Users

1. Click on *Users & Groups*
2. Click on *Users*
3. Click on **Add User**
4. Enter the user's first name
5. Enter the user's last name
6. Enter the user's primary email address
7. Select the user's privileges

*End Users receive a welcome letter once loaded into the system. The welcome letter will include details about the quarantine email as well as login information to access the user interface.*

*Silent Users do not receive a welcome letter when loaded into the system. Their profile can be changed (i.e. to an end user) at a later stage.*

8. Enter a password for the user (Optional)
9. Click on **Save**

New users are registered every half-hour. Therefore mail will not flow to the new user until the change is made. If SMTP Discovery is enabled, users will be able to receive email immediately.

## Manage Users

Once users have been loaded initially, you can use the user interface to:

- Add new users
- Update an existing user
- Delete a user

### Add New User

1. Click on *Users & Groups*
2. Click on *Users*
3. Click on **Add User**
4. Enter the user's first name (Optional)
5. Enter the user's last name (Optional)
6. Enter the user's primary email address
7. Select the user's privileges

*End Users receive a welcome letter once loaded into the system. The welcome letter will include details about the quarantine email as well as login information to access the user interface.*

*Silent Users do not receive a welcome letter when loaded into the system. Their profile can be changed (i.e. to an end user) at a later stage.*

8. Enter the user's mobile number (Optional)
9. Enter a password for the user (Optional)
10. Click on **Save**

*New users are registered every half-hour. Therefore mail will not flow to the new user until the change is made. If SMTP Discovery is enabled, users will be able to receive email immediately.*

### Update Existing User

1. Click on *Users & Groups*
2. Click on *Users*
3. Select the user you wish to update

*If necessary you can use the search field to locate the user by name.*

4. Update the user's information as needed
5. Click on **Save**

### Delete User

1. Click on *Users & Groups*
2. Click on *Users*
3. Check the checkbox next to the user you wish to delete
4. Select Delete from the Action drop down list
5. Click on **Apply**

### Mass Update

The mass update feature allows you to apply a change across all or a large set of users. For example, if you have loaded users as silent users you may want to change them to an end user to ensure they receive the quarantine digest and can login into the system.

1. Click on *Users & Groups*
2. Click on *Users*
3. Select Mass Update from the Action drop down list
4. Select the appropriate option from the list displayed (e.g. user privileges)

*If you are changing silent users to end users you will want to send users a welcome email. Make sure the "send welcome email" checkbox is checked.*

5. Click on **Update Users**

## Additional Configuration

### Update Spam Configuration

The spam configuration has been set to meet the needs of most organizations. You can adjust the Spam Sensitivity for an organization if desired.

1. Click on *Company Settings*
2. Click on *Spam*
3. Click and drag the slider left (more aggressive) or right (less aggressive)

*The default value is 7*

4. Choose additional options as needed
5. Click on **Save**

## Update Digest Configuration

The quarantine digest is enabled by default. It is configured to send a daily digest to all end users. You can adjust the digest configuration if desired.

1. Click on *Company Settings*
2. Click on *Digests*
3. Adjust configuration as needed
4. Click on **Save**

# Cutover

Once configuration and validation has completed, the companies MX records can be updated to direct to the Proofpoint Essentials service. Please note that updates to MX records may take a few minutes to apply. MX records for this environment are listed in the Important Information section.

# Validation

Message logs can be used to validate mail flow once a customer has updated their MX records to flow email through Proofpoint Essentials.

## View Logs

1. Click on *Logs*
2. Click on *Licensed*
3. Select any from the status drop-down menu
4. Click on **Search**

*The search results will show you all recent email traffic that Proofpoint Essentials has filtered.*

# Branding

By default, all companies created under your partner account will use the branding (colour scheme, logo, etc.) you have applied to your partner site. If you would like the company to also have a branded login screen, please follow these steps.

1. Navigate to the login screen
2. Login using your existing account
3. The URL in the browser will change once you have successfully logged in
4. Identify the "e_id" value from the URL
   - https://us2.proofpointessentials.com/index01.php?mod_id=3&e_id=21043
5. Logout
6. Use the eid value and update the URL as follows:
   - https://us2.proofpointessentials.com/app/login.php?eid=21043

# Technical Support

## Contacting Support

You can contact the Proofpoint Essentials support team in a number of ways:

**Email**

support-essentials@proofpoint.com

**Phone**

+1 (408) 850-4016

**Web (Tickets, Online Chat)**

http://support.proofpointessentials.com

We recommend partner administrators register with our support site as well as subscribe to our news feed. This will ensure that you can login to the site and create and view tickets as well as receive notices about the Proofpoint Essentials service.

*To register with the support site:*

1. Open a web browser and navigate to http://support.proofpointessentials.com
2. Click on **Register**
3. Enter your full name, email address and a password
4. Type in the registration verification code
5. Click on **Sign-Up**

*To subscribe to the Support site news feed:*

1. Open a web browser and navigate to http://support.proofpointessentials.com
2. Click on **Subscribe**
3. Enter the Email Address you wish to subscribe to the news alert
4. Click on **Submit**

## Knowledge Base

The Proofpoint Essentials support site includes a Knowledge Base. Please check the knowledge base before contacting support as your issue may have previously been identified and resolved.