CELLOPOINT

Secure Your Email

CelloOS 4.1.17 End User Guide

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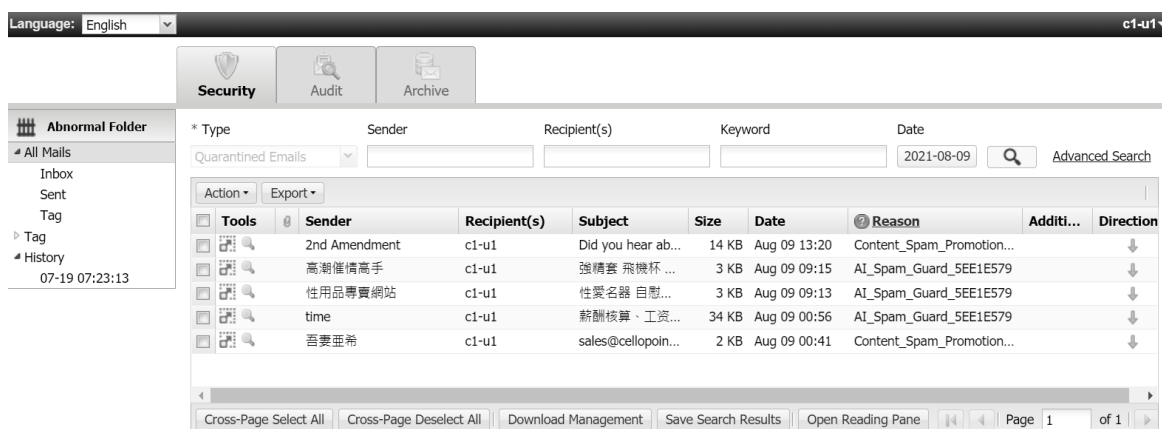
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I

Chapter 1 Quarantine-Spam Notification

All the mails which are identified by Cellopoint as Spam Emails will be temporarily placed in the Abnormal Folder as illustrated below.

Abnormal Folder

The system will then periodically send you a list (known as Quarantine-Spam Notification) indicating mails that were filtered and intercepted, where you can then decide to resend or delete the mails. Notification only list emails being filtered from the last notification sending time to this time. If the mails however are not spam as listed, you can add the senders of the mails into your white list, thereby allowing mails from these senders to quickly bypass scanning in the future. Also, if you find that some of the mails are not spam mails, you can report them as "Not Spam" back to the system, allowing the system to "learn" from these mistakes and reduce the false positive rate in the future.

➢ Quarantine-Spam Notification

The format of the Quarantine-Spam Notification is as follows (as shown in a typical mail software Inbox):

Quarantine-Spam Notification

❑ Sender: This is the sender name of the Cellopoint Quarantine-Spam Notifications. This sender name is determined and specified by the administrators.

❑ Subject: This "Subject" field reveals the type of notification, and the time it is sent. Please see the graphic above and you will find that "Quarantine-Spam Notification" shows the type of the notification, and "2006-09-21 16:00" displays the time it's sent.

➢ After clicking the notification, you will see the quarantined mail list (The following figure illustrates the notification mail in hyperlink format):

Quarantine Email List

❑ Quarantine-Spam Notification: This is the name of the notification and it is marked with red color font.

❑ Period: The period from receiving the first quarantined email to the last quarantined email within quarantined-spam notification sending schedule. It will be calculated and displayed in the following format: Year-Month-Day Hour: Minute: Second ~ Year-Month-Day Hour: Minute: Second. The Quarantined-Spam Notification sending schedule is defined by the system administrators. For example, the administrators may set the notification to be sent at 08:00, 12:00 and 18:00 every day.

❑ NO.: From 1 ~ N.

❑ Sender: This field displays the spam envelop sender address (Mail From:) on the mail, however, you may find that it could be different from the real sender's mail address when you open the mail.

❑ Subject: The subject on the header of the mail.

❑ Received at: The time when this mail is received.

❑ Size: The size of the mail. The units are KB or MB.

➢ The four hyperlink icons provided in front of each notification are for further actions to be taken by the users.

❑ Resend : To send this mail back from the quarantine folder.

❑ Not Spam : Tag this mail as a missed valid mail, and report it to the system. The mail will then be moved to the "missed valid mail" directory from the spam directory in the system. This option however, is not suitable for e-News.

❑ White List+Resend : Add this mail sender's email address to the white list and resend this email. The Cellopoint email firewall won't quarantine the mails sent by the sender who has been added to the white list. We suggest you also add the contact person and the mail address of the e-News that you want to receive to the white list.

❑ Delete : Delete the mail.

➢ Click the "Click Here to Login Mail Center" hyperlink on the bottom of the mail to log in to the personalized management system of the Cellopoint for further checking of the quarantine mails.

❖ Note: If the administrator does not allow any user to log in to the system, you will not be able to log in to the Cellopoint system.

Part

II
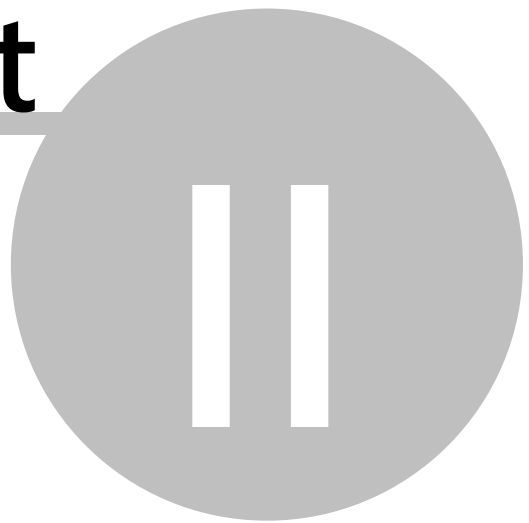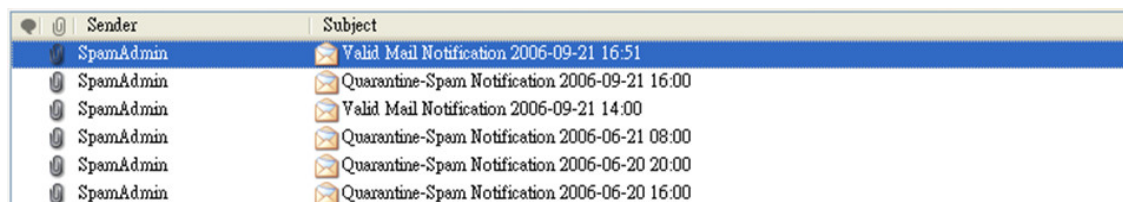
Chapter 2　Valid Mail Notification

CelloOS will also periodically send users the list of the mails which are scanned and considered valid by the system (as shown as "Valid Mail Notification" email in the figure below). This allows the user to inspect the mails (which have been passed and considered as valid) with the option to flag some of these valid mails as missed spam mails if they were found actually spam mails during the users' inspection. In dealing with these missed spam mails, the users can add the spam sender's email address to the blacklist, therefore prohibit receiving any future emails from this sender. Alternatively, the user can report the missed spam mails to the system so that the system will automatically "learn" from the mistake and reduce the false positive rate in the future.

➢ Valid Mail Notification

The users will receive the Valid Mail Notification sent by the system periodically, and the notification is shown as below:

Valid Mail Notification

❑ Sender: This is the sender name of the Cellopoint Valid Mail Notification. This sender name is determined and specified by the administrators.

❑ Subject: This "Subject" field reveals the type of notification, and the time it is sent. Please see the graphic above and you will find that "Valid Mail Notification" shows the type of the notification, and "2006-09-21 16:51" displays the time it's sent.

➢ After clicking the notification, you will see the valid mail list (The following screenshot illustrates the notification mail in hyperlink format):

Valid Email Notification
(Period: 2015-01-15 00:00 ~ 2015-01-15 23:59)

	NO.	Sender	Subject	Received at	Size
	1	u1@a.com	222 Winter Sale! Codeine, Hydrocodone, Vicodin, XanexValuim & All medications available. Buy Now! ccts u9me	2015-01-15 17:18:13	2.7 KB
	2	u1@a.com	2222 7雄競逐4G執照 最快明年起飆	2015-01-15 17:18:13	125.5 KB
	3	u1@b.com	2222 7雄競逐4G執照 最快明年起飆	2015-01-15 17:18:22	125.5 KB
	4	u1@b.com	222 Winter Sale! Codeine, Hydrocodone, Vicodin, XanexValuim & All medications available. Buy Now! ccts u9me	2015-01-15 17:18:22	2.7 KB

Help
Spam: Report this missed spam to Global Antipam Center to improve catching rate.

Valid Mail List

❑ Valid Email Notification: This is the name of the notification and it is marked with red color font.

❑ Period: The period from receiving the first passed valid email to the last passed valid email within the Valid Email Notification sending schedule. It will be calculated and displayed in the following format: Year-Month-Day Hour: Minute: Second ~ Year-Month-Day Hour: Minute: Second. The Valid Email Notification sending schedule is defined by the system administrators. For example, you may set the notification to be sent at 08:00, 12:00 and 18:00 every day.

❑ NO.: From 1 ~ N.

❑ Sender: This field displays the envelop sender address (Mail From:) on the valid mails, however, you may find that it could be different from the real sender's mail address when you open the mail.

❑ Subject: The subject on the header of the mail.

❑ Received at: The time when this mail is received.

❑ Size: The size of the mail. The units are KB or MB.

➢ The hyperlink icon provided in front of each notification is for further actions being taken by the users.

❑ Spam ✉❌: Select this option to flag the mail as a spam mail, and report this missed spam mail to the system. This mail will then be moved to the "missed spam" directory from the valid mail directory.

➢ Click the "Click Here to Login Mail Center" hyperlink on the bottom of the mail to login to the personalized management system of the Cellopoint for further checking of the passed valid mails.

❖ Note: If the administrator does not allow any user to login to the system, you will not be able to login to the Cellopoint system.

Part

III
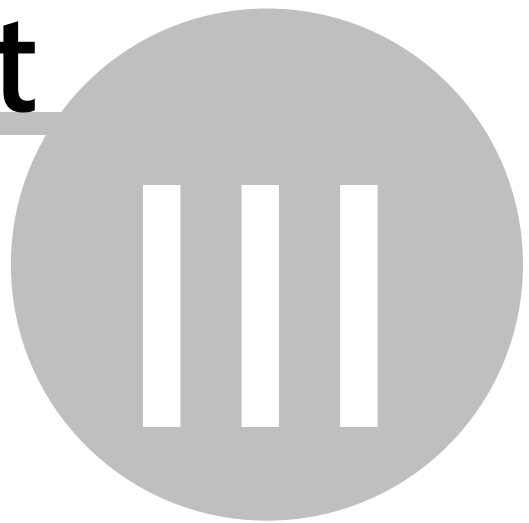
Chapter 3 Log in to the System

When you receive the notifications of possible spam mails (see Chapter 1), you can click the "Click Here to Login Mail Center" hyperlink in the notification to login to the Cellopoint system. In the Login page, enter the username and password, and click the "Log In" button. You can also open your web browser and point to the Cellopoint's IP address to access the login page (Note: The login function can be optionally disabled by the system administrators.)

➢ How to Log in to the System
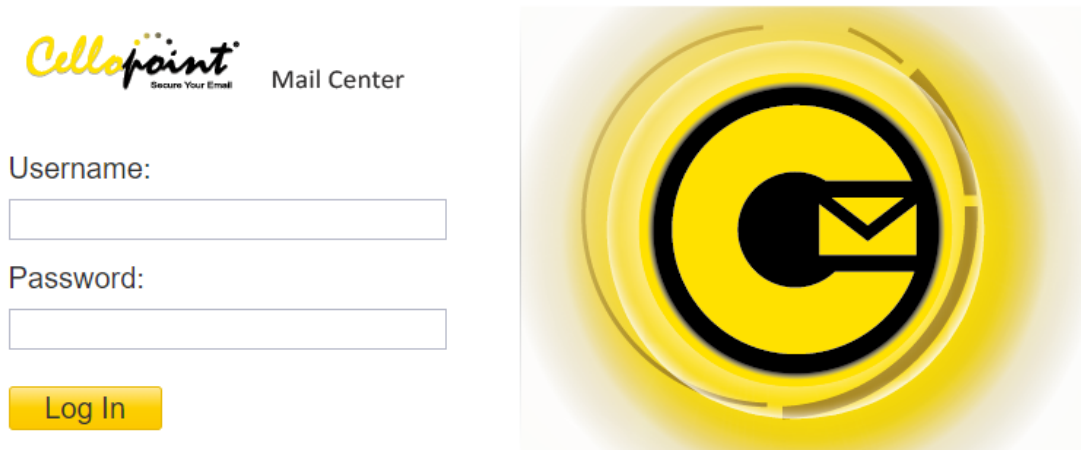
❑ You may click the "Click Here to Login Mail Center" hyperlink in the notification to log in to the Cellopoint personalized management system (The hyperlink is valid for 7 days). Once the login is verified, you will see your personalized management page. An example of the personalized management page is shown below:
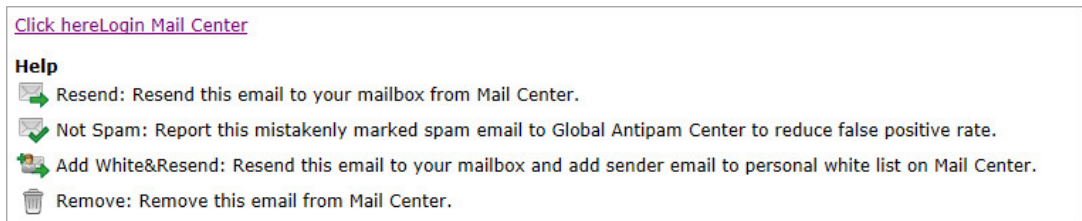
Log in to the System via Notification Link

❑ You may also open your web browser and point to the Cellopoint's IP address to access the login page. After You login to the system, you will be able to check the mails in the archive folder and quarantine folder.

❖ Note: The login function can be optionally disabled by the system administrators.
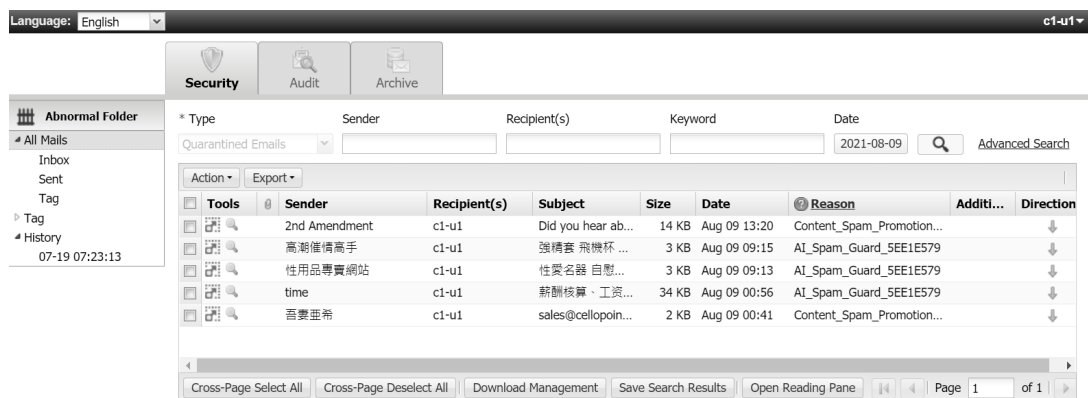
System Login Page

After logging in to the Cellopoint management system, you will be led to the Quarantine Folder of "Security" page as the following graphic shows:

Abnormal Folder Page

- There are several additional functions at the top-right corner, the illustration is as follows:

  ✓ Language: Click to open the Language drop-down menu, the options include Traditional Chinese, English, Simplified Chinese, and Japanese.

  ✓ Time Zone: If the local time zone of the login browser is different from the time zone of the system device, a drop-down menu which lists the local time zone and the system device time zone will show up for the users to select.

✓ Username: The login username will be shown here. Click the username to open the drop-down menu, the options include Help (go to the online help center of the system), Edit (Account Management), Outlook Add-in (go to the online help center of the Outlook Add-in), and Log Out (log out from the system).

● Below the black bar are 3 main function tabs for the users to manipulate. These 3 major function tabs are "Security", "Audit", and "Archive" in sequence. After you logged in, you will be led to the Quarantine Folder of the "Security" function page. The details of these 3 major functions will be described in the later chapters of this End User Guide.

● The upper left side of the main screen displays the sub-menu bar of the main function. This sub-menu bar displays the email folders and other relevant functions of the main function. It will vary if you click different major function tab.

Part

IV

Chapter 4 Account Management

The "Account" management page allows the users to set up several basic settings of his own account. The users are able to click the "Edit" button at the up-right corner of the screen to access these account setting functions.
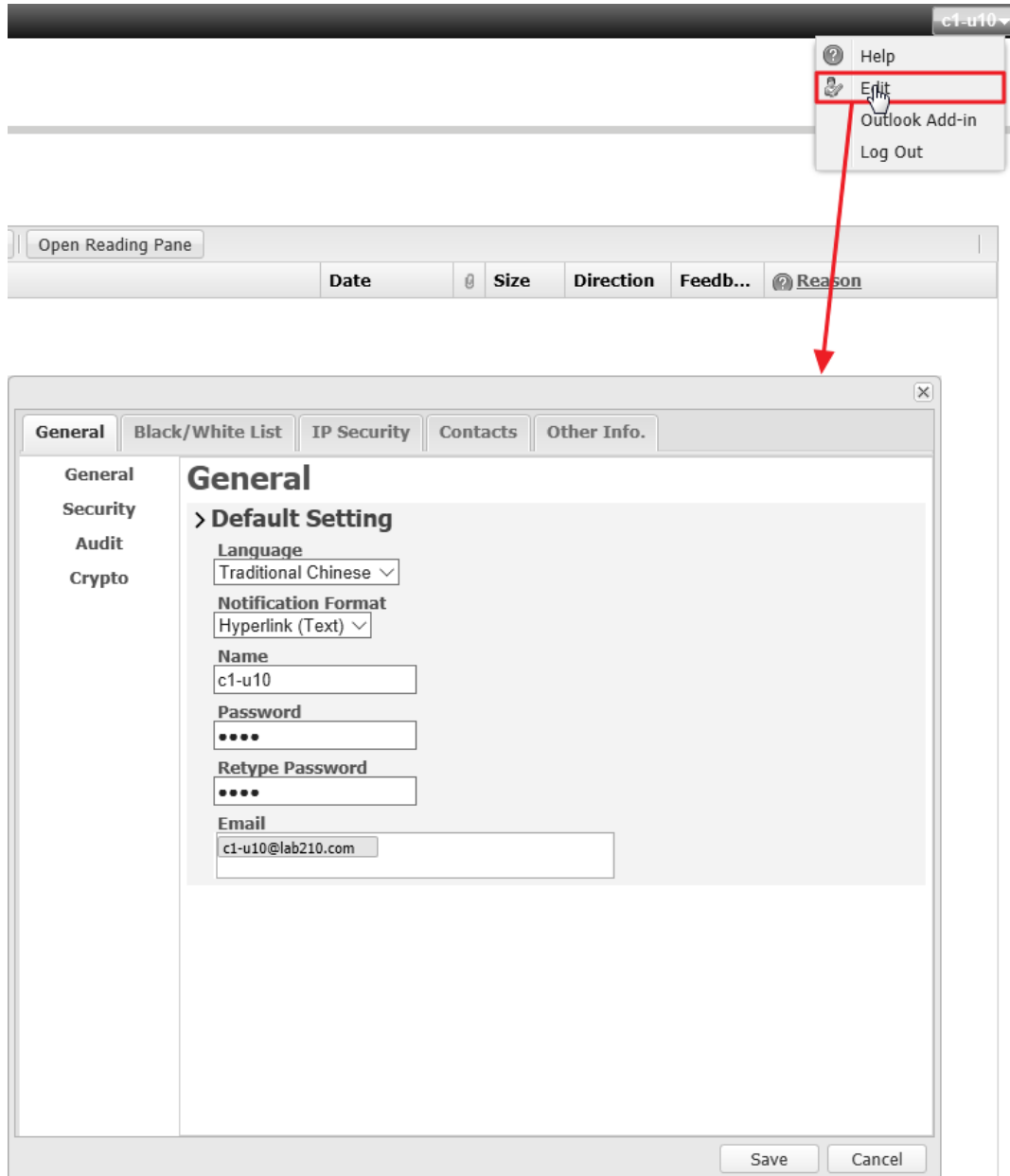
Account Management Window

The account management window contains "General", "Black/White List", "IP Security", "Contacts", and "Other Info." subtab pages. The users are able to set, change, and modify all the account-related settings of the users' accounts according to their requirements.

➢ General: The "General" tab includes 4 major items, which are listed on the left panel. These items are "General", "Security", "Audit", and "Crypto." The setting functions of these 4 items are described below.

❑ General: The users are allowed to modify the default settings of their accounts in this "General" page.

● Default Setting:

✓ Language: Select the system language version when viewed by this account. The options are English, Traditional Chinese, Simplified Chinese, Spanish, German and Japanese.

✓ Notification Format: The users are able to specify their desired notification format. The options are "Hyperlink", "Short", "Mobile", and "Hyperlink (Text)."

✓ Name: The users are able to set up, change or modify his own account name.

✓ Password: The login password of the user's account can be set or changed in this field.

✓ Retype Password: Re-type the login password of the user's account in this field for confirmation.

✓ Email: Input the email address of the user's account in this field.

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

❑ Security: The users are able to specify whether to receive the system mail security notifications or not.
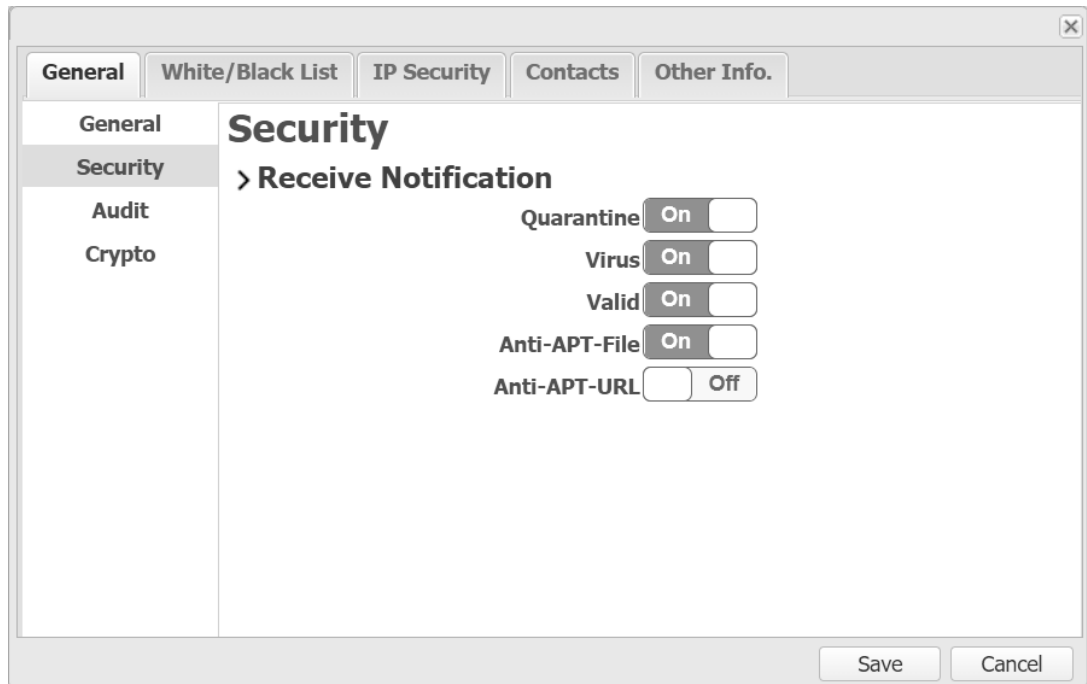
General Security Settings

● Receive Notification:

  ✓ Quarantine Notification: Left click on the "On" and "Off" button to switch this function on or off.

  ✓ Virus Notification: Left click on the "On" and "Off" button to switch this function on or off.

  ✓ Valid Notification: Left click on the "On" and "Off" button to switch this function on or off.

  ✓ Anti-APT-File Notification: Left click on the "On" and "Off" button to switch this function on or off. (The system must have the Anti-APT-File license to be equipped with this function)

  ✓ Anti-APT-URL Notification: Left click on the "On" and "Off" button to switch this function on or off. (The system must have the Anti-APT-URL license to be equipped with this function)

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

❑ Audit: The users are able to specify whether to receive the system audit status notifications or not. In addition, the user can set his deputy for handling the email audit process.

❖ The system must have the Audit license to be equipped with this sub-function.

General Audit Settings

● Receive Notification:

✓ Audit Status Notification: Left click on the "On" and "Off" button to switch this function on or off.

✓ Receive notifications during absence periods: Left click on the "On" and "Off" button to switch this function on or off.

● Default Setting:

✓ Deputy: Allows the user to set the deputy for the user's account. Click the "Add" [+] button beside the deputy column and a "User List" window will appear, offering the entire system user list for the users to choose a deputy account. Double-click on the desired account to set it as a deputy for the user's account.

✓ Deputy Period: Allows the users to set the deputy period for the account. Left click on the blank field of the deputy period column and a calendar function tab will appear on the screen, allowing the users to set the date of the deputy period by year, month, day, hour and minute.

Deputy Period

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
◄	↑		October	2019	►	▲	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	**14:00**
29	30	1	2	3	4	5	15:00
6	**7**	8	9	10	11	12	16:00
13	14	15	16	17	18	19	17:00
20	21	22	23	24	25	26	18:00
27	28	29	30	31	1	2	19:00
						▼	
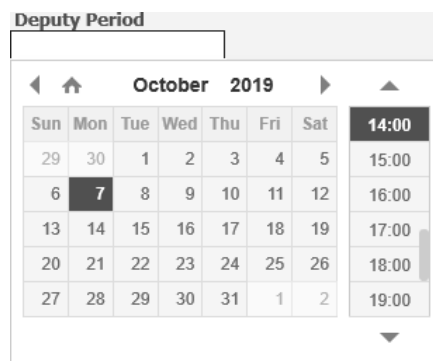
Deputy Period Setting

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

❑ Crypto: The users are allowed to modify the default Crypto settings of their accounts.

❖ The system must have the Encryption license to be equipped with this sub-function.
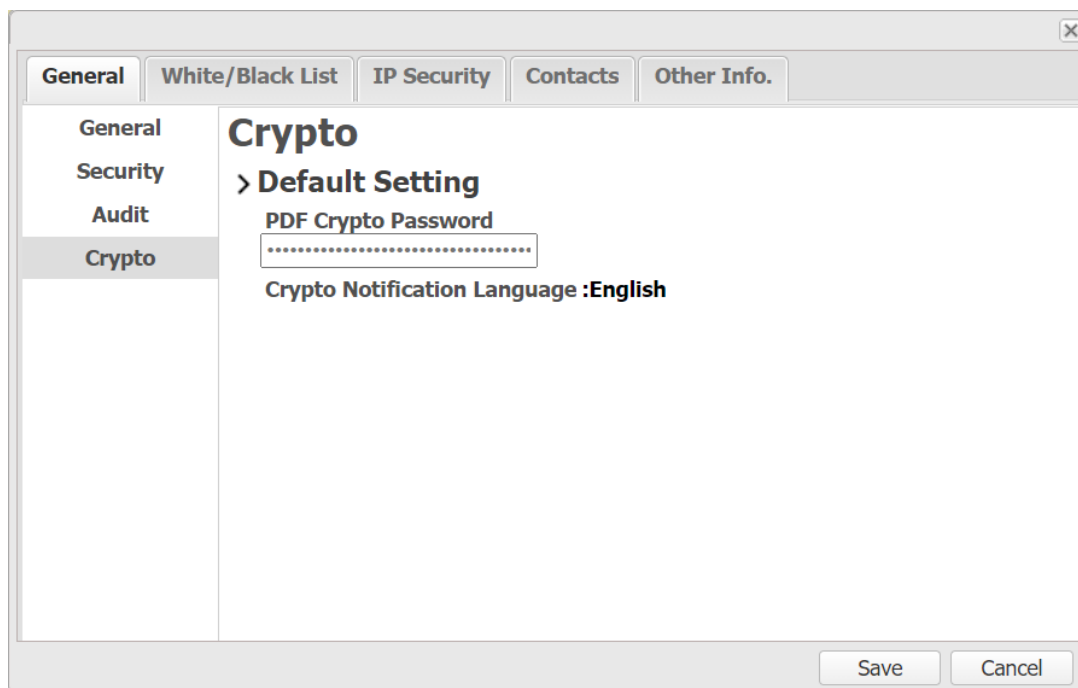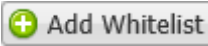
General Crypto Settings

- Default Setting:

  - ✓ PDF Crypto Password: The users are able to enter and set the desired password for the email PDF encryption.

  - ✓ Crypto Notification Language: The users are allowed to set or change the language version of system crypto notifications. The options are English, Traditional Chinese, Simplified Chinese, and Japanese.

  - ❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

- ➢ Black/White List: The users are able to determine whether a mail is a spam mail by specifying the sender in the Black/White list. There are two sub-functions in this subtab page, one is "Black List" and the other is "White List."
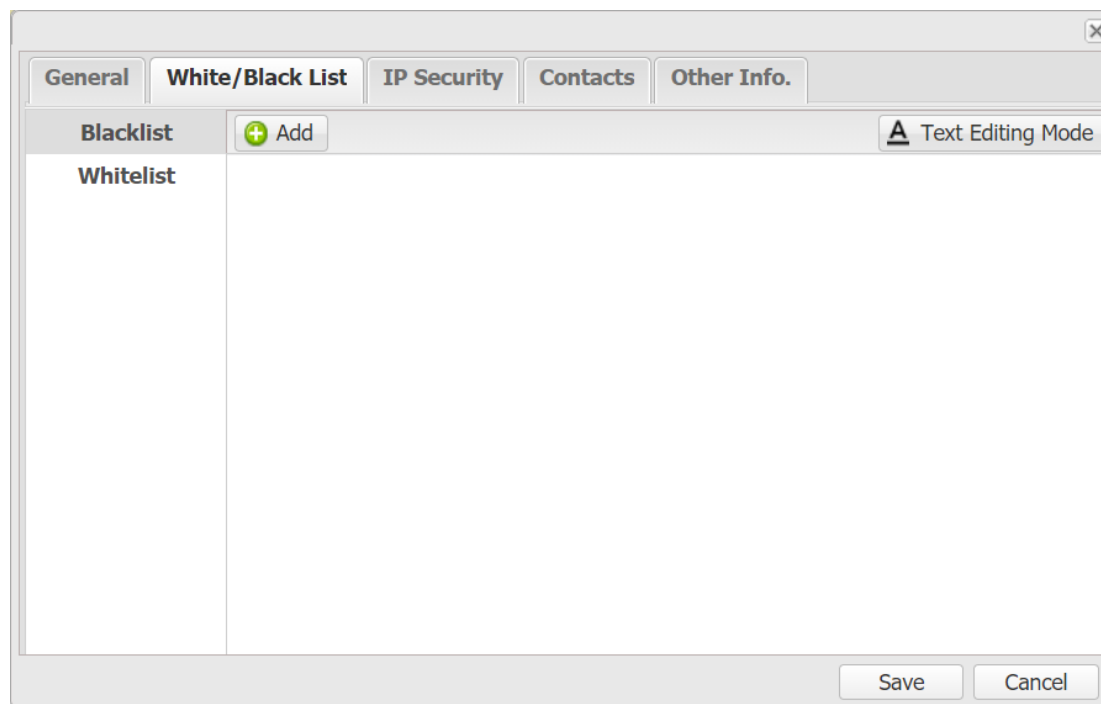
Black/White List

❑ Black List: Mails from addresses or domains specified here will be treated as spam mails. Click the "Add Black List" [➕ Add Blacklist] button to add the desired addresses or domains to the Black list.

- Format: The format can only be @xxx.com or xxx@xxx.com.

- Limitation: The maximum length of the list is 1000 characters.

- Text Editing Mode: The users can also click the "Text Edting Mode" button to use the text editor to add their desired IP and email address lists. The users are able to copy-and-paste the list here and click "Save."

❑ White List: Mails from addresses or domains specified here will be treated as valid mails. Click the "Add White List" [➕ Add Whitelist] button to add the desired addresses or domains to the White list.

- Format: The format can only be @xxx.com or xxx@xxx.com.

- Limitation: The maximum length of the list is 1000 characters.

● Text Editing Mode: The users can also click the "Text Edting Mode" button to use the text editor to add their desired IP and email address lists. The users are able to copy-and-paste the list here and click "Save."

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

➢ IP Security: In this subtab page, the users are able to add the IP addresses of the user accounts allowed to log in. If the IP address of a user account matches the filled value, the user account will be granted to log in to the system. Click the "Add IP Security" ⊕ Add IP Security button to add IP addresses.
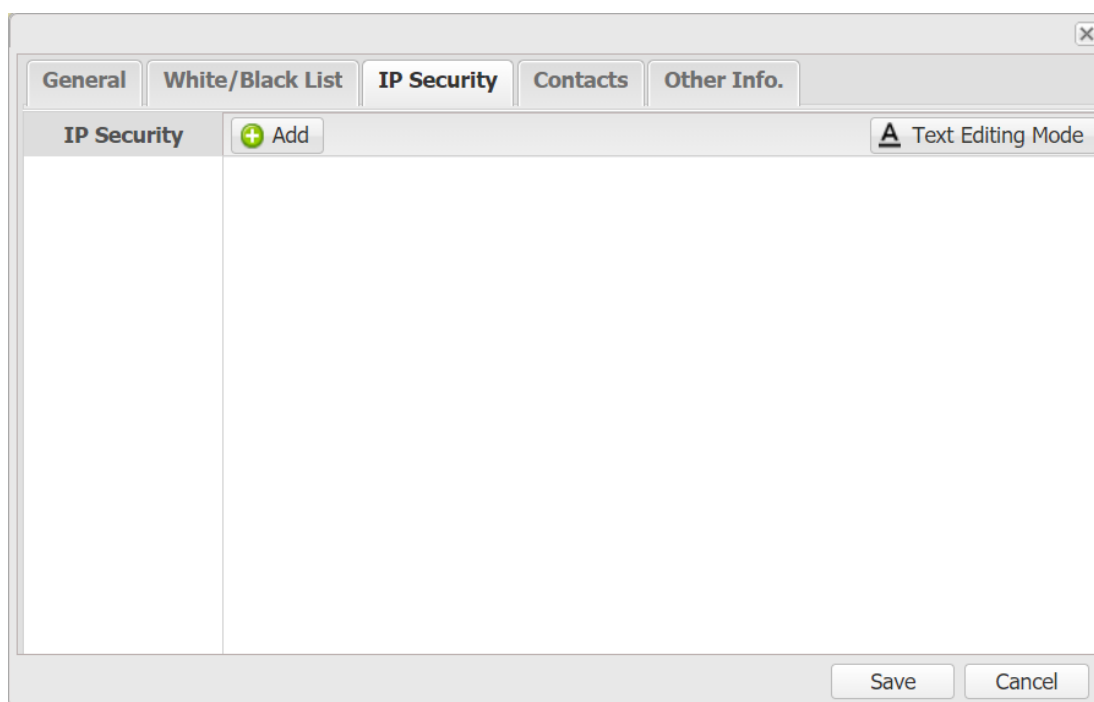
IP Security

❑ Format: The format can be a IP address or a segment. For example:

192.168.1.107

192.168.1.0/24

192.168.1.0/255.255.255.0

❑ Limitation: The maximum length of the list is 1000 characters.

❑ Text editing mode: The users can also use text editor to create their own IP and email address lists, and then copy-and-paste the list here and click "Save".

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

➢ Contacts: The contact list of the account will be shown in this page, including the IP history and display name. The users can select "Ignore IP" or "Ignore Name" to determine whether to ignore the change of IP or display name of the contact. If the option(s) are selected, the system will not send notification when the IP or display name is changed.

❖ The system must have the Anti-BEC license to be equipped with this subtab page.

	Edit	**Email address**	**Display Name**	**Comment**
☐	🖊	daniel.white@company.com	Daniel Blaine White Daniel White Dan White Dan Danny Mr. White CEO Daniel White D. Blaine White Daniel B. White	CEO

General   Black/White List   IP Security   **Contacts**   Other Info.
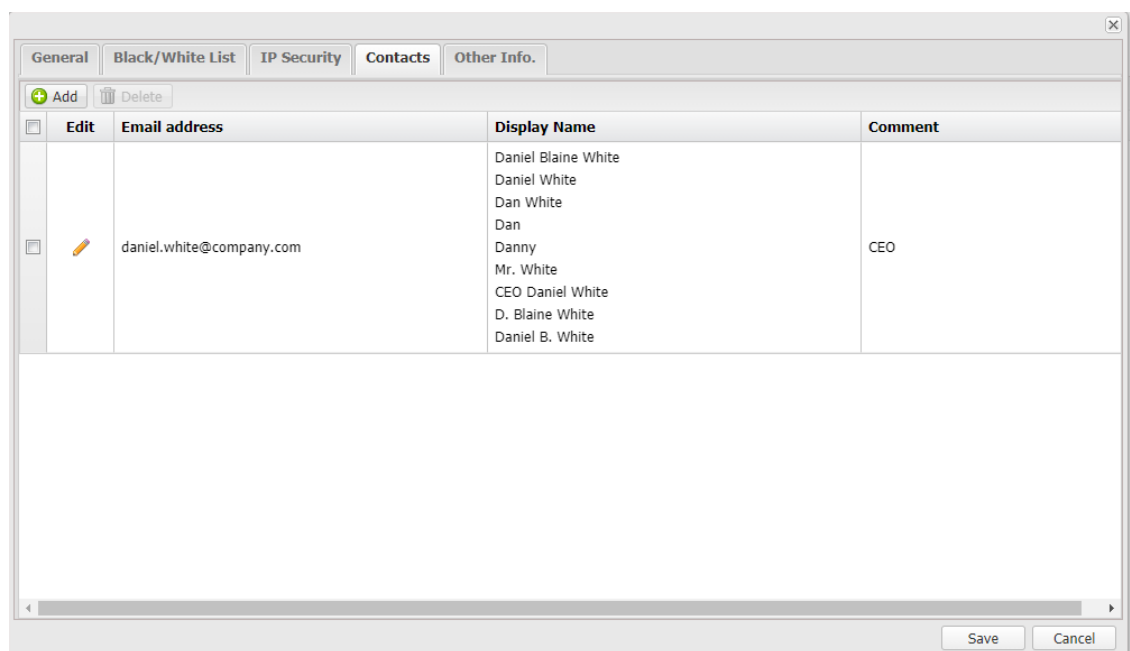
Contacts

❑ Add Contacts: Click add button to add Contacts' information. The user can fill "Email address", "Comment", "Display Name". If the users need to add new Display Name, you can click the add button in the below. Click the edit icon to modify the Display Name. And then, the users can click the Text Editing Mode button to Add or Edit Display Name. After setting the whole items, please Click the Save button. To increase the accuracy of detecting fraudulent emails, it is strongly recommended to enter all the possible Display Names of the PIP such as the Native Name, Passport Name, Alias, etc.

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

➢ Other Info.: Displays the group which this account belongs to and the groups managed by this account.
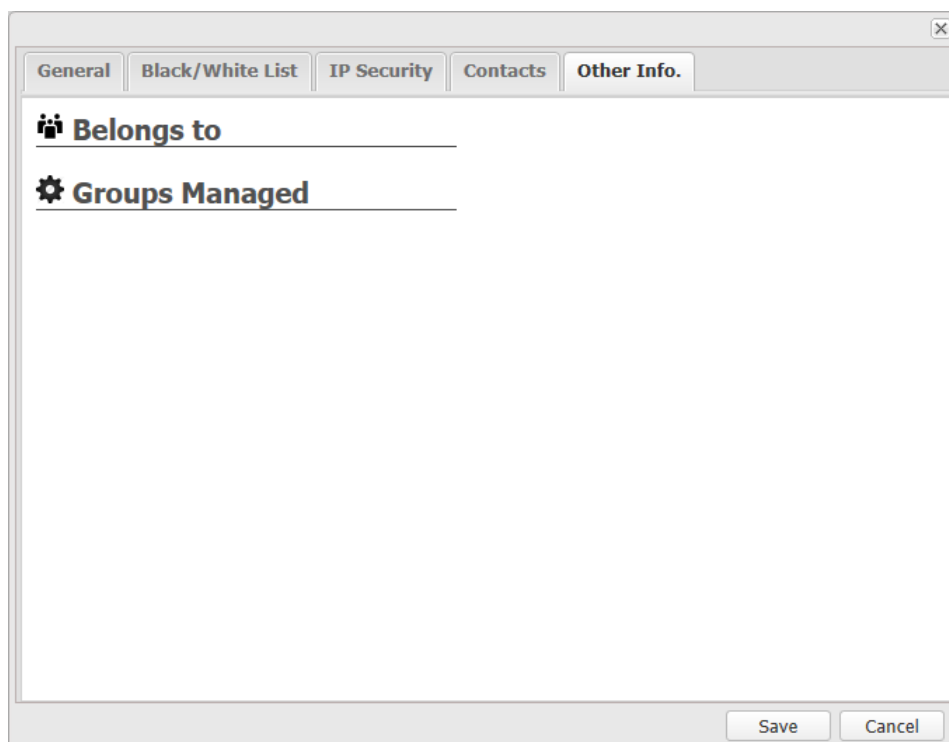
Other Info.

❑ Belongs to: Displays the group which this account belongs to.

❑ Groups Managed: Displays the groups managed by this account.

❖ Note: After changing the settings, please remember to click the "Save" button below to apply the new settings.

Part V
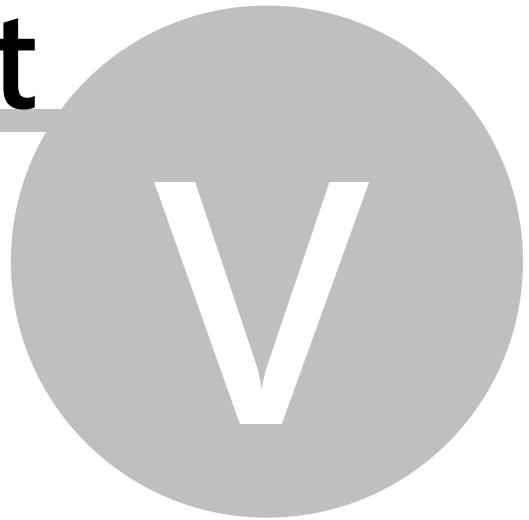
Chapter 5 Abnormal Folder

After you login, you will be led to the Abnormal Folder of the "Security" function page. You can check the abnormal emails in this area.

The abnormal emails include Anti-APT-File Emails, Virus-Infected Emails, Anti-BEC Emails, Quarantine Emails, Anti-APT-URL Emails. Users can check the types of abnormal emails which are based on the setting. The most of users can check the quarantine emails in abnormal folder.

There are subfolder about " All Mails "," Inbox "," Sent "," Deleted Email "," History "in the left frame.

- The "All Mails "subfolder includes " inbox " or " Sent ", and you can check the abnormal emails which are received or sent.

- When system administrators deleted emails or emails are auto-deleted with policy setting, they are placed in " Deleted Email ".

- You can check the searching records in " History " subfolder, and the system will store latest 10 records.

The Valid Folder can be classified into three areas which are Mail Search Filter, Valid Folder Toolbar, Valid Folder Display Area.(For top to bottom) The details are described below.

Abnormal Folder

➢ Mail Search Filters: You can search the email condition about " Type ", " Sender "," Recipient(s) "," Keyword ", " Date ", and " Advanced Search ". After finishing the setting, please click the "search icon 🔍 " to search the results.

❑ Type: You can select the type of abnormal emails which are " All ", " Anti-APT-File Emails ", " Virus-Infected Emails ", " Anti-BEC Emails ", " Quarantined Emails ", " Anti-APT-URL Emails ". When you select the all types to view the all abnormal emails, you can't use actions for emails. Because there are individual action in each of abnormal emails, you should select the single type when you need to execute action item. For details, please refer to action.

❖ Notice: You only view the current type of abnormal emails when the system can't be selected the type in column. The type column will not be displayed in Abnormal Display Area.

❑ Sender: Please enter the sender's address.

❑ Recipient(s): Please enter the recipient's address.

❑ keyword

● Keyword searching may be performed using either Chinese or English. When searching in Chinese, users should only use either Traditional Chinese or Simplified Chinese for a given search. If both Traditional and Simplified Chinese are used during a search, desired emails may not be able to be identified. For further information, please [click here](#).

● The administrators can use the laws of Boolean Algebra when you would like to do a keyword search. (The following order of the signs is based on the search priority.) Boolean Algebra helps you to rule out several keywords. For example, the administrators can search the email which was sent to user1 and excludes the keyword " XXX" .

● You may use the Boolean Algebra operation signs listed below when you are doing a keyword search. (The operation order of the keyword formula is from the left to the right. If there is a Parentheses symbol in a keyword formula, the Parentheses sign will be processed first.)

a. | (Pipe Sign): Represents " OR" and it must come along with spaces before and after. Without spaces before and after, it will be reckoned as a string instead of an operation sign.

b. - (Minus Sign): Represents " NOT" . If the Minus Sign is between two character strings, it must come along with spaces before and after; if it is in front of a character string, a space before the Minus sign is not needed. Without spaces before and after, it will be reckoned as a string instead of an operation sign.

c. + (Plus): Represents " AND" , and it must come along with spaces before and after. Without spaces before and after, it will be reckoned as a string instead of an operation sign.

d. ( ) (Parentheses): The part of the strings within the Parentheses sign is processed first. If there is another operation sign in front of it, it must come along with a space; if it comes along with a string, a space before the Parentheses sign is not needed.

e. " "(Double Quotes): The part of the strings within the Double Quotes sign is reckoned as one string. It does not come along with spaces before and after. If you would like to search a string with a parenthesis only, you need to put it within the Double Quotes sign.

✓ Example

	Searching Syntax	Syntax Description
1	apple + orange	Finds contents which include both apple and orange

2	apple | orange	Finds contents which include either apple or orange
3	apple - orange	Finds contents which include apple and exclude orange
4	apple-orange	Finds contents which include the string apple-orange
5	- apple	Finds contents which exclude apple
6	apple + orange | banana	Finds contents which include both apple and orange or banana
7	apple + (orange | banana)	Finds contents which include either orange or banana and apple
8	apple + (orange | (banana - wine))	Finds contents which includeorange or banana without wine and apple
9	apple | (-orange)	Finds contents which include either apple or exclude orange
10	" (apple "	Finds contents which include (apple

o   Searching Skills

–   When you using the operation "AND", the system search a keyword on left formula which is not found, it will not search the keyword on right continually.

–   If a word "apple" is high frequency of occurrence, and a word "banana" is low frequency of occurrence. You can search the string banana + apple better than the string apple + banana

❖   Note: Generally, the space can be viewed as plus(+), but only when searching condition is simple, and without using other Boolean Algebra signs or select the TC/SC Compatible. For example, searching the strings apple banana orange or apple + banana + orange are the same in result.

● Multiple Keyword Search

The descriptions above explain the rules for single keyword search. (e.g. type in only a keyword in the subject column). When you enter different

keywords in multiple search columns, for example, in both the subject column and the body column, the system will analyze the individual keywords first and then analyze the "OR" operator or the "NOT" operator to retrieve the final results.

- ✓ Filter Correlation OR : Using the "OR" operator, your search results will include results containing either one keyword, or both keywords. For example, if you search "Apple OR Banana", you will find emails containing "only Apple", "only Banana" and "both Apple and Banana."

- ✓ Filter Correlation NOT : Using the "NOT" operator, your search results would be limited to those that contain only the term you designate before the NOT, but not the term after the NOT. For example, if you search "Apple NOT Banana", only emails containing "Apple" and excluding "Banana" will appear.

- ✓ No select above of Filter Correlation: Without using any operator, your search results will use the "AND" operator by default, and hence your search results would be limited to those that contain both words connected with AND. If one of the keywords does not appear in the emails, you would not find any email. For example, if you search "Apple Banana", you will find the emails containing both "Apple" and "Banana."

  - ❖ Note: When you use the multiple column to search keywords, the system cannot use the parentheses to search the contents.

❑ Date: The default is current date. Please click the date button to select Today, Yesterday,Recent Days, Custom Days for search. If search days are more than the preset background search days, an window " Info " will pop up and inform the users that the search will be turned into background search. As the users,

they can set whether auto-export compressed email file and send notification after the search is completed in the window.
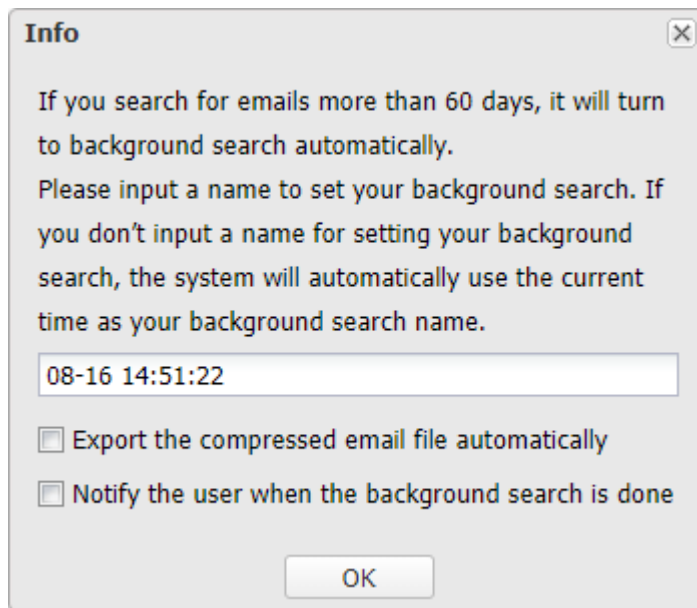
Background Search Notification Window

❑ Advanced Search: The users are able to add the search filters to search the mails in the quarantine folder for obtaining the appropriate search results, which effectively narrows the search scope. The search filter options are

described below.

Advanced Search

Saved Search Filter: Please select...

Date: ● Today ○ Yesterday ○ Recent ○ Custom

Direction: ☐ Inbound ☐ Outbound ☐ Local ☐ Relay

Filter Correlation: ● AND (all of) ○ OR (any one of) ○ NOT (exclusion)

Sender:
Email/Name
IP Address/Domain Name

Recipient(s):
Email/Name
IP Address/Domain Name

Keyword:
☐ TC/SC compatible
Keyword (Full-text)   Subject
Body   Reason
Tag   Message-ID
Attachment
File name and content

Time:
From   To
    :   ~   :

Sort:
Sort By   Sort

Email size:
KB ~   KB

Resend Count:
    ~

Predefined Filter:
☐ Bcc   ☐ Email has compressed attached file
☐ Email has attached file   ☐ Email has unextractable attached file
☐ Required read receipt   ☐ S/MIME encryption
☐ S/MIME signature   ☐ Important email
☐ The fingerprint has
  been added into blacklist

(TW)Smart ID Type:
☐ Personal ID No.   ☐ Name
☐ Address   ☐ Telephone
☐ Cell phone   ☐ Credit card number

(CN)Smart ID Type:
☐ Personal ID No.   ☐ Name
☐ Telephone   ☐ Phone (Telephone and cell phone)
☐ Cell phone   ☐ Credit card number
☐ Address

Report Type:
☐ Not spam   ☐ Mis-categorized eDMs

Feedback:
☐ All report status   ☐ The license has expired
☐ Reported   ☐ The local setting is set to quarantine or release
☐ Report resolved   ☐ Unable to report

Custom Search:
(TW) Cell phone   >
( ) and or

Abnormal Folder Advanced Search Window

- Saved Search Filter: The administrators can select a saved search filter in the drop-down menu.

- Date: The date filters are Today, Yesterday, Recent, and Custom.

  - ✓ Today: Allows the administrators to search all the quarantined mails received today.

  - ✓ Yesterday: Allows the administrators to search all the quarantined mails received yesterday.

  - ✓ Recent: Allows the administrators to search all the quarantined mails received in a recent period of time. The options are Recent __ day(s), Recent __ week(s), Recent __ month(s), and Recent __ year(s). (The __ values are determined by the administrators.)

  - ✓ Custom: Click the Custom button to set the mail search starting date and ending date.

    - o From: Click the calendar button to open the calendar, and select the start date.

    - o To: Click the calendar button to open the calendar, and select the end date.

- Direction: Can be set to Inbound, Outbound, Local, and Relay.

- Filter Correlation: The users are able to set the filter correlation here.

  - ✓ AND (all of): All of the filters have to be matched.

  - ✓ OR (any one of): Any one of the filters is matched.

  - ✓ Not (Exclusion): Exclude the filters.

● Search Target: The users can designate a username or group as a search condition.

   ✓ Username: To search the emails related to this username.

   ✓ Group: To search the emails related to this group.

● Sender: Allows the users to set the sender-related filters for searching the emails. Enter the corresponding value in the Email/Name and IP Address/Domain Name columns. Please click the sender to open a new tab which displays the example for Advanced Search.

● Recipient(s): Allows the users to set the recipient-related filters for searching the emails. Enter the corresponding value in the Email/Name and IP Address/Domain Name columns. Please click the Recipient(s) to open a new tab which displays the example for Advanced Search.

● Keyword: Allows the users to set the keyword-related filters for searching the emails. Enter the corresponding value in the Keyword (Full-text), Subject, Body, Reason, Tag, Message-ID, and Attachments columns. The administrators can also select the TC/SC Compatible item to search both Traditional Chinese and Simplified Chinese contents. Please click the Keyword to open a new tab which displays the example for Advanced Search.

● To search the Anti-APT-File scanning timeout emails, please enter *meta_apt_timeout* in this field.

● TC/SC Compatible : Administrators are allowed to type in Traditional Chinese and search contents in Simplified Chinese, and vice versa. This search function is only applicable to email contents in full Traditional Chinese or full Simplified Chinese and contents without specific words that are needed to be translated to TC or SC local terms. If you cannot search and find your targeted emails, please enter the keywords in the " Full-Text

Search" column directly, and do not select the advanced search function " TC/SC Compatible".

It is likely that you will not find the information you want if the following conditions happen when you choose " TC/SC Compatible" function.

✘ The email contents include both Traditional Chinese and Simplified Chinese. For example, 基點资讯(TC,TC,SC,SC)、基点資讯(TC,SC,TC,SC).

✘ The email contents include specific words that are needed to be translated to local terms. For example, (TC)硬碟→(SC)硬盘、(TC)晶片→(SC)芯片

❖ If you would like to search emails with both Traditional Chinese and Simplified Chinese, please enter the appropriate keywords which are in complete TC or SC in the " Full-Text Search" column. For example, "基点資讯" (SC, SC, SC, SC) is an appropriate keyword.

● Time: Allows the users to set the time-related filters for searching the emails. Enter the corresponding value in the From and To columns.

● Sort: Allows the users to set the sorting filters for searching the emails. Choose the corresponding items from the Sort By and Order columns.

  ✔ Sort By: The Sort By options are Time, Subject, Sender, and Mail Size.

  ✔ Sort: The Sort options are Ascending and Descending.

● Email Size: This item allows the users to set the email size range for searching the emails.

● Resend Count: Allows the administrators to search according to the resend count.

- Risk Level: Can be set from 0 to 100. (Once the Anti-APT-File Emails are selected in type column, and this column can be set.)

- Predefined Filter: Allows the users to set the predefined filters for identifying the emails with some specific personal information.

  ✓ Bcc: If this item is checked, it will identify and search the emails which has Bcc recipients.

  ✓ Email has compressed attached file: If this item is checked, it will identify and search the emails which has compressed attached files.

  ✓ Email has attached file: If this item is checked, it will identify and search the emails which has attached files.

  ✓ Email has unextractable attached file: If this item is checked, it will identify and search the emails which has unextractable attached files.

  ✓ Required read receipt: If this item is checked, it will identify and search the emails which require read receipt.

  ✓ S/MIME encryption: If this item is checked, it will identify and search the emails with S/MIME Encryption.

  ✓ S/MIME signature: If this item is checked, it will identify and search the emails with S/MIME Signature.

  ✓ Important email: If this item is checked, it will identify and search the emails which are marked as Important Email.

  ✓ The fingerprint has been added into blacklist: If this item is checked, it will search the emails which have been added into fingerprint blacklist. Additionally, the retention days of fingerprint blacklist keep amounts of day(s) based on the valid emails.

- (TW) Smart ID type

  ✓ personal ID No.: If this item is checked, it will identify and search the emails containing Taiwan Personal ID No.

  ✓ Name: If this item is checked, it will identify and search the emails containing Taiwan Name.

  ✓ Address: If this item is checked, it will identify and search the emails containing Taiwan Address.

  ✓ Telephone: If this item is checked, it will identify and search the emails containing Taiwan Telephone.

  ✓ Phone(Telephone and cell phone): If this item is checked, it will identify and search the emails containing Taiwan Phone(Telephone and cell phone) number.

  ✓ Cell phone:If this item is checked, it will identify and search the emails containing Taiwan Cell phone number.

  ✓ Credit card number:If this item is checked, it will identify and search the emails containing Taiwan Credit card number.

- (CN) Smart ID Type

  ✓ personal ID No.: If this item is checked, it will identify and search the emails containing China Personal ID No.

  ✓ Name: If this item is checked, it will identify and search the emails containing China Name.

  ✓ Telephone: If this item is checked, it will identify and search the emails containing China Telephone number.

✓ Phone(Telephone and cell phone): If this item is checked, it will identify and search the emails containing China Phone (Telephone and cell phone)number.

✓ Cell phone:If this item is checked, it will identify and search the emails containing China Cell phone number.

✓ Credit card number:If this item is checked, it will identify and search the emails containing China Credit card number.

✓ Address: If this item is checked, it will identify and search the emails containing China Address.

● Report Type: The administrators can set to search the emails reported as Not spam and Mis-categorized eDMs.

● Feedback: The users can set the following report status as a search condition. Multiple selections are allowed.

✓ All Report Status

✓ The license has expired

✓ Reported

✓ The local setting is set to quarantine or release

✓ Report resolved

✓ Unable to report

● Custom Search

✓ Set the individual information to be checked:

- o (TW)Personal ID No.: If this item is checked, it will identify and search the emails containing Taiwan Personal ID No.

- o (TW)Name: If this item is checked, it will identify and search the emails containing Taiwan Name.

- o (TW)Address: If this item is checked, it will identify and search the emails containing Taiwan Address.

- o (TW)Telephone: If this item is checked, it will identify and search the emails containing Taiwan Telephone.

- o (TW)Phone(Telephone and cell phone): If this item is checked, it will identify and search the emails containing Taiwan Phone(Telephone and cell phone) number.

- o (TW)Cell phone: If this item is checked, it will identify and search the emails containing Taiwan Cell phone number.

- o (TW)Credit card number: If this item is checked, it will identify and search the emails containing Taiwan Credit card number.

- o (CN)Personal ID No.: If this item is checked, it will identify and search the emails containing China Personal ID No.

- o (CN)Name: If this item is checked, it will identify and search the emails containing China Name.

- o (CN)Address: If this item is checked, it will identify and search the emails containing China Address.

- o (CN)Telephone: If this item is checked, it will identify and search the emails containing China Telephone number.

- o (CN)Phone(Telephone and cell phone): If this item is checked, it will identify and search the emails containing China Phone (Telephone and cell phone)number.

- o (CN)Cell phone: If this item is checked, it will identify and search the emails containing China Cell phone number.

- o (CN)Credit card number: If this item is checked, it will identify and search the emails containing China Credit card number.

✓ Select individual information symbol quantities of operation: The calculation symbols for the count of personal information include "greater than (>)" , "less than (<)" , "equal to (=)" , and "not equal to(!=)" .

✓ Fill in the threshold of personal information count: You can enter the threshold number in this column.

✓ Add the custom search condition: After finishing the three settings mentioned above, please click the "green cross button " to add this custom search condition. The condition will then appear in the column below

✓ Insert the Delimiter: When using multiple search conditions, you can insert a delimiter in between, and add the "Parentheses" ((/)) button to enclose individual conditions.

✓ Matching Rule: When you set up multiple conditions, you may choose "and" or "or" as the operator by clicking either the "and" button or the "or" button. If you choose "and" , the search results will be the matches of all the conditions. If you select "or" , you will find emails which match one of the conditions.

Custom Search: (CN) Name   v   > v   3   ⊕

( ) and or

(audit/tw.mobile_phone>2)and(audit/cn.name>3)

Custom Search

❖ After setting the advanced filters, click the "Search" 🔍 button to conduct searching. Click the "Save" 💾 button to save the settings as a Saved Search Filter. To clear the settings, click the "Reset" ▼ button.

➢ The Abnormal Folder Toolbar: There are function buttons which are "Cross-Page Select All", " Cross-Page Deselect All ", "Export", "Download Manager", "Save Search Results", and "Open Reading Pane" function buttons, allowing the users to take further actions to the emails. The details are described below.

❑ Action: The function can be executed only when you select the single type of abnormal email. The action can be classified into the same action for abnormal email and the specific action for abnormal emails.The details are described below.

● The same actions for types of abnormal emails

✓ Delete: Please select the target mails and click the Delete button. The target mails will be deleted.

✓ Tag: Please select the target mails and click the " Tag " button. After tagging the emails, the users can find the tagged emails in the "Tag" folder.(This button will be enabled or disabled according to the license settings of the user.)

✓ Resend: Please select the target mails and click the Resend button. The target mails will be resent to the original user's mailbox. If an email has

been resent, the system will send the notification to the recipient.When you resend an email, the email will be scanned through Anti-BEC Protection module again.

✓ Forward: Please select the target mails and click the Forward button. A forwarding dialog box will appear, allowing the administrators to type the email address of the target recipients in the blank recipient column. After entering the recipient's email address, click the Send button to forward the target mail to the specified recipient.

❖ Notice: Each of Resend and Forward function in email type need to enable authority; otherwise, you cannot use the resend or forward function. For example,users only enable the resend and forward function in quarantine emails, and you cannot use the both function in other email types.

Forward the Abnormal Mails

● The specific action for types of abnormal emails

✓ All: If you select the All in type column, and the action column will not be executed.

✓ Anti-APT-File Emails: Please select this item and click search icon, and Anti-APT-File Emails will be displayed in the Abnormal Folder Display Area.

✓ Virus-Infected Emails: Please select this item and click search icon, and Virus-Infected Emails will be displayed in the Abnormal Folder Display Area.

✓ Anti-BEC Emails: Please select this item and click search icon, and Anti-BEC Emails will be displayed in the Abnormal Folder Display Area.

o Anti-BEC action:Please click this button to open the drop-down menu, the options include " Release " , " Release and Report ", " Release " and " add to Low-Risk List and Spam ".
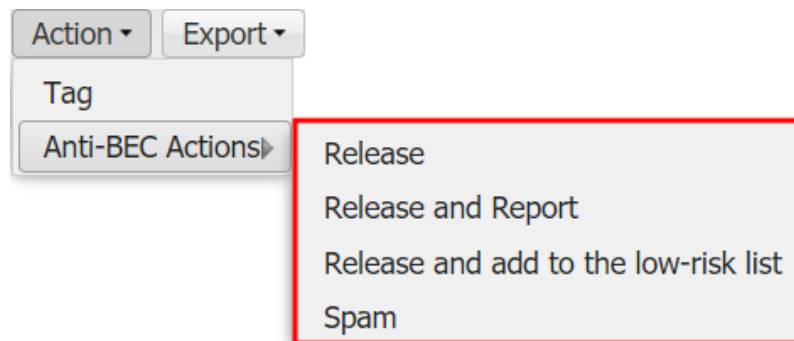
Anti-BEC Actions

– Release: Please click on this item to release the email.

– Release and Report: Please click on this item to add the sender information to the Low-risk List, report to the CloudCenter that this is not a Anti-BEC email, and release the email. From now on, if the sender IP, sender address, and sender domain all match the recorded sender information, the system will automatically release the email.

– Release and Add to the Low-Risk List: When you click on this button, a message box "This is not a fraudulent message, please release it and add the sender's source information to the low-risk list." will pop up.

❖ Please note that your action of adding a sender to the low-risk list will not be reported to our CloudCenter.

– Spam: Please click on this item to report the email as a spam.

✓ Quarantine Emails: Please select this item and click search icon, and Quarantine Emails will be displayed in the Abnormal Folder Display Area.

o Not Spam: If there are some emails incorrectly identified as quarantined mails, the administrators are able to select these mails and click the Not Spam button to clarify these mails as normal emails.

o Add to Individual Whitelist: If there are some emails incorrectly identified as quarantined mails, the users are able to select these mails and click the Not Spam button to report these mails as normal emails. They can also click the " Add to Individual Whitelist " button to add the sender email address(es) or sender IP(s) to the whitelist. After adding the specified sender addresses or IPs to the whitelist, the emails sent from these specified email addresses or IPs will be classified as normal emails. The details are as follows:

– Add the Sender Email(s) to Whitelist: Please select the target mail and click the "Add to System Whitelist " button. A drop-down menu will appear, offering two options for adding. Please select the first "Add sender email(s) to whitelist" item to add the specified email sender's address to the white list. After adding it to the whitelist, the emails sent from this specified email address will be classified as normal emails.

– Add the Sender IP(s) to Whitelist: Please select the target mail and click the " Add to System White List " button. A drop-down menu will appear, offering two options for adding. Please select

the second "Add sender IP(s) to white list " item to add the specified email sender's IP to the white list. After adding it to the white list, the emails sent from this specified IP will be classified as normal emails.

- ✓ Anti-APT-URL Emails: Please select this item and click search icon, and Anti-APT-URL Emails will be displayed in the Abnormal Folder Display Area.

  - o Not Anti-APT-URL: If there are some emails incorrectly identified as Anti-APT-URL emails, the administrators are able to select these emails and click the Not Anti-APT-URL button to clarify these emails as normal emails.

❑ Export: It allows the users to export the selected quarantine emails to CSV files, HTML files, PDF, PST or compressed email files as the following graphic shows. Select the desired emails and then click the "Export" button for exporting the emails.

- ● Export as .CSV: Select the Export as .csv item from the Export drop-down menu. A Export as .csv window will pop up. The setting items in the window include Export Method, Recipient's email address, Export, Filename, and Columns.
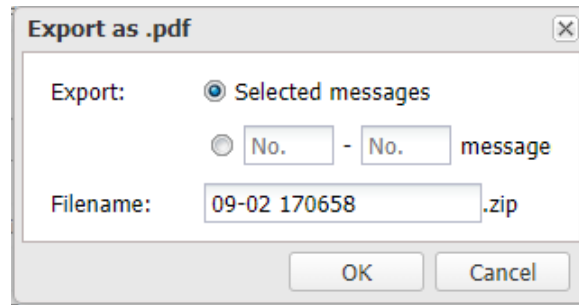
Export as .csv

- ✓ Export Method: Select one of the option from the radio buttons. The file can be saved to the local drive or sent to an email address.

  - o Save to Local Drive: The exported file can be saved to the local drive.

  - o Export to Email: The exported file can be sent to designated recipient.

   - – Recipient's email address: If the "Export to Email" option is selected, the email address has to be set in this field.

- ✓ Export: The messages to be exported. The users can export the selected messages or designate the number of messages.

- ✓ Filename: The file name of the exported file.

✓ Columns: The columns in the email list are listed here. The users can select the columns to be exported by checking the checkbox of each item.

● Export as .html: Select the Export as .html item from the Export drop-down menu. A Export as .html window will pop up. The setting items in the window include Export Method, Recipient's email address, Export, and Columns.

Export as .html

✓ Export Method: Select one of the option from the radio buttons. The file can be saved to the local drive or sent to an email address.

o Save to Local Drive: The exported file can be saved to the local drive.

o Export to Email: The exported file can be sent to designated recipient.

– Recipient's email address: If the "Export to Email" option is selected, the email address has to be set in this field.

✓ Export: The messages to be exported. The users can export the selected messages or designate the number of messages.

✓ Columns: The columns in the email list are listed here. The users can select the columns to be exported by checking the checkbox of each item.

● Export as .pst: Select the Export as .pst item from the Export drop-down menu. A Export as .pst window will pop up. The setting items in the window include Export and Filename.
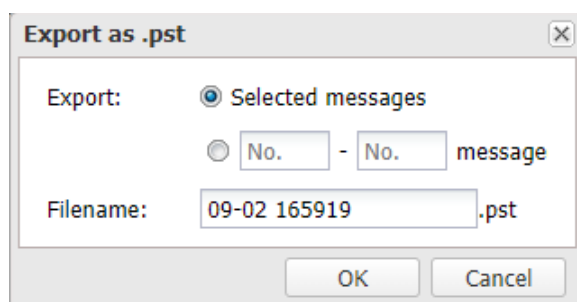

Export as .pst

✓ Export: The messages to be exported. The users can export the selected messages or designate the number of messages.

✓ Filename: The file name of the exported file.

❖ After the settings are done, please click OK to export the file.

● Export as .pdf: Select the Export as .pdf item from the Export drop-down menu. A Export as .pdf window will pop up. The setting items in the window include Export and Filename.

Export as .pdf

- ✓ Export: The messages to be exported. The users can export the selected messages or designate the number of messages.

- ✓ Filename: The file name of the exported file.

- ❖ After the settings are done, please click OK to export the file.

- ● Export compressed email files: Select the target mails and click the "Export" button, then choose the "Export as compressed email files" option. An "Export as compressed email files" window will pop-up on the screen as the following graphic shows. It allows the users to edit and setup the configuration items of exporting the mails to compressed email files.
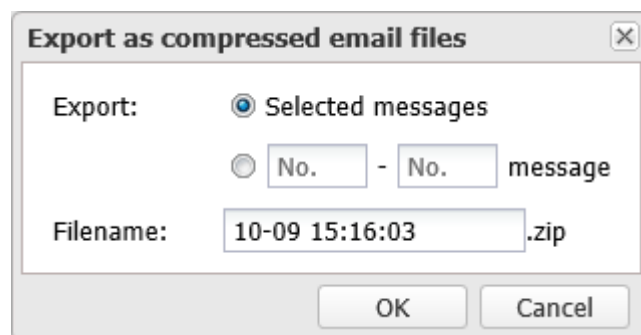
Export as Compressed Email Files

- ✓ Export: The messages to be exported. The users can export the selected messages or designate the number of messages.

- ✓ Filename: The file name of the exported file.

❑ Cross-Page Select All: Click this button to select all emails across all pages.

❑ Cross-Page Deselect All: Click this button to deselect all emails across all pages.

❑ Download Management: Click the "Download Management" button and the "Download Management" window will pop-up on the screen. It allows the users to download exported compressed email files or delete them.
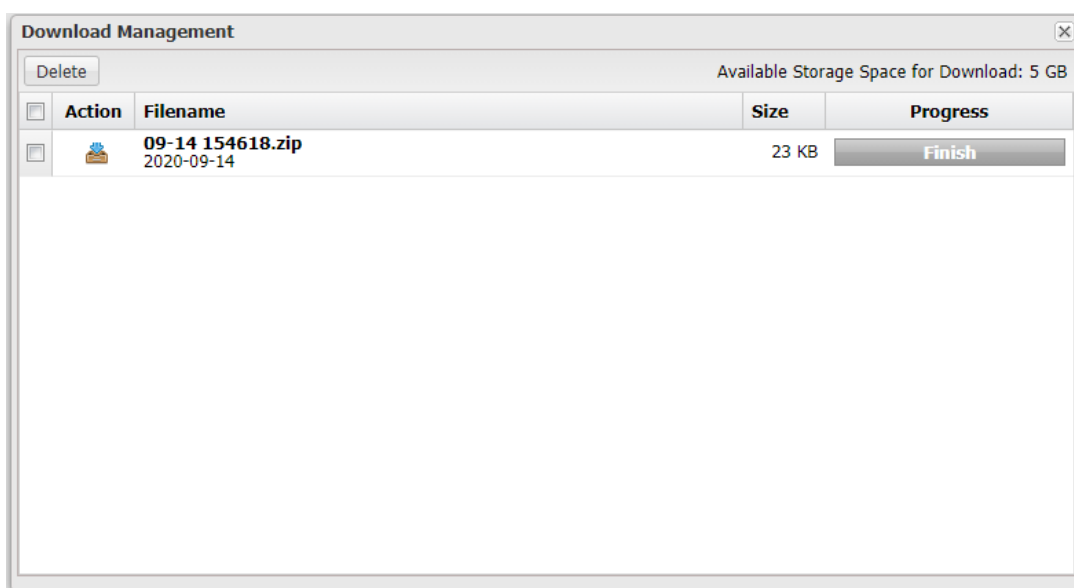
Download Management

● Delete: Select the download(s) to be deleted Delete and click the Delete button. If the file is still downloading, the download will be terminated. If the file has been downloaded, it will be deleted.

✓ Action:Action: Click the Download 📥 icon to download the exported file to the local computer.

✓ File Name: The file name and date of the compressed email files will be displayed in this column.

- ✓ Size: The size of the compressed email files will be displayed in this column.

- ✓ Progress: The compressing progress of the email files will be displayed in this column by the percent sign (%).

❑ Save Search Results: Click this button, enter "Search Name" in the pop-up window, and click the "OK" button to save the search result. The saved search result will be shown in the mail folder list on the left side, and 100 records can be saved at most. To delete the saved search result, please click the "Delete" button beside the name of the saved search result in the mail folder list. The users can also delete all of the saved search results by clicking the "Delete" button beside the "Saved Search" folder. A confirm dialog box will pop up after click the "Delete" button, please click "Yes" to complete the deletion.
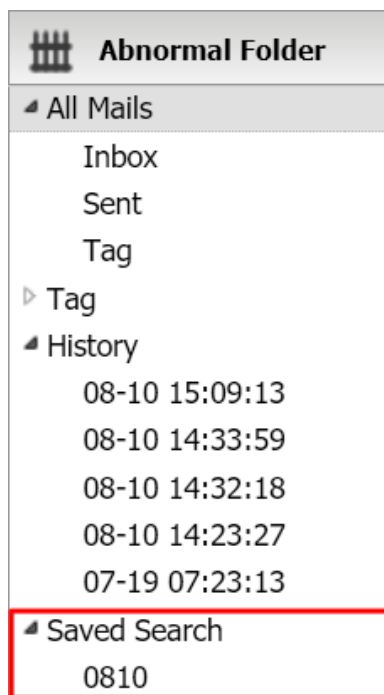
Save Search Results

❑ Open Reading Pane/Hide Reading Pane: Select the target mails and click the "Open Reading Pane" button. The content of the target mails will be displayed in the mail content display area.

● Content: Click this button to view the email content of the selected email. Users can click the "Download Mail" button in the reading pane to download the email. There is also an encoding drop-down menu for users to change the encoding of the email. In addition, Open Reading Pane Frame will display the currently viewed email type and subject. If you only can view the single of abnormal emails, it will display the currently viewed email subject.

● Header: Click this button to view the email header information of the selected email.
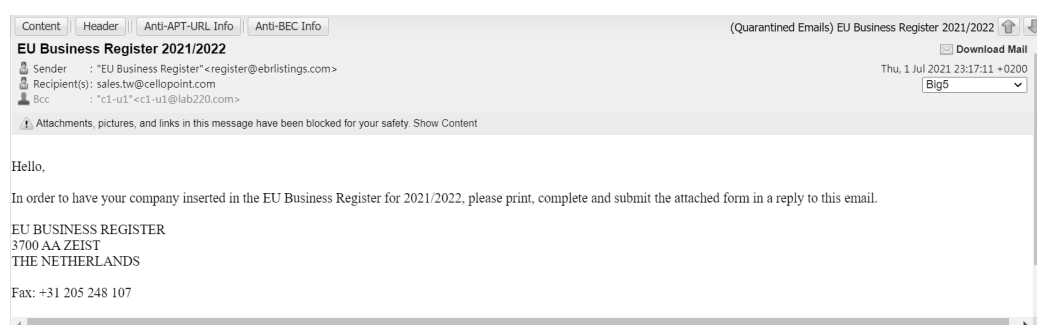
Email Reading Pane

➢ Abnormal Folder Display Area: The quarantine abnormal folder display area contains multiple columns to show the details of the emails, such as "Type","Tools", "Sender", "Recipient(s)", "Subject", "Size", "Date", "Reason", "Addition Information", "Direction", and "Attachments" as the following graphic shows.

❑ Type: Displays the types of abnormal emails, such as Anti-APT-File Emails, Virus-Infected Emails, Anti-BEC Emails, Quarantine Emails, and Anti-APT-URL Emials.

❑ Tools: There are two function buttons in this column. One is the "Expand" button and the other one is the "Correlation Search" button.

● Expand Button ( ): Click this button in front of the email will expand the email for users to view the email content. To stop viewing the email content, please click the Close button ( ).
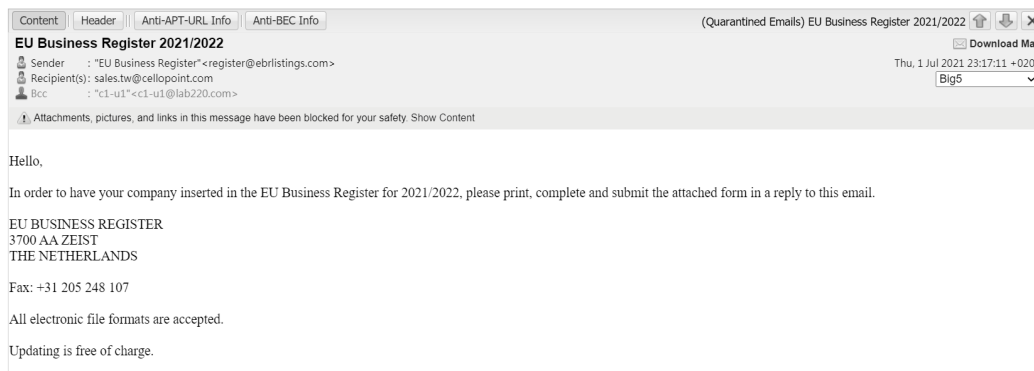
Expanding the Email

✓ Download Mail: After the users expand the email, they can choose to download the email as well. Click the "Download Mail" Download Mail button at the top right corner to download the email.

● Correlation Search Button ( ): Click this button in front of the email and a drop down list will appear on the screen, showing the "Sender", "Recipient(s)", "Subject", and "Reason" information of the email. The users are able to directly click on these information items and add them as the search filters to initiate an email search for the emails which are correlated to this email.

Correlation Search

❑ Attachments: Displays the attachments of the email.

❑ Sender: Displays the sender information of the email.

❑ Recipient(s): Displays the recipient information of the email.

❑ Subject: Displays the subject of the email.

❑ Size: Displays the size of the email.

❑ Date: Displays the receiving date of the email.

❑ Reason: Displays the quarantine reason for the email.

● Quarantine Reason Introduction:

Reason	Description
AI_Fraud_Guard	Mail obviously contain fraud information
AI_Phishing_Guard	Mail obviously contain phishing spam
AI_Spam_Guard	Mail obviously contain spam information
Auto Black List	Sender email address is the same as recipient's email address
BAD_PPH	Same spam pattern is already blocked by other spam reason
BAD_URL	The URL in the email content is listed in the blacklist
BAD_URL	Mail contains malicious URL
BATV	Failed to pass the BATV verification
BEC_HighRisk	Suspicious scam email(s). It/They might be determined as high-risk because of several reasons.
Bad From	Unresolved "From" header
Bad Header	Unresolved header format
Bad Subject	Unresolved "Subject" header
Bad To	Unresolved "To" header
Blacklist	Sender's Email/IP address is listed in user black list
Content_OEDU	Mail obviously contain educational spam
Content_OFIN	Mail obviously contain obvious financial spam
Content_OFRA	Mail obviously contain fraud information
Content_OPHI	Mail obviously contain phishing spam

Reason	Description
Content_OPRO	Mail obviously contain promotional spam
Content_Spam_AD	Mail obviously contain promotional spam
Content_Spam_BADCONTENT	Massive suspicious mails with low IP reputation
Content_Spam_BADEDM	EDM contains bad content, unknown URL and unknown sender IP
Content_Spam_Cother	Mail obviously contain spam information
Content_Spam_Education	Mail obviously contain educational spam
Content_Spam_Financial	Mail obviously contain obvious financial spam
Content_Spam_Fraud	Mail obviously contain fraud information
Content_Spam_FraudPhi	Mail obviously contain fraud information
Content_Spam_Guard	Mail obviously contain spam information
Content_Spam_Phishing	Mail obviously contain phishing spam
Content_Spam_Promotional	Mail obviously contain promotional spam
DMARC_Quarantine	DMARC authentication failed, and the policy of DMARC record is quarantine, then quarantined.
DMARC_Reject	DMARC authentication failed, and the policy of DMARC record is reject, then quarantined.
Empty Sender	No specified sender address
Exp_Spam_SigIP	Mail has abnormal email address in signature and comes from bad reputation
~~Sender Verification~~	~~Sender verification failed~~
~~SPF~~	~~Sender failed to pass the SPF verification~~
Heuristic_BADEDM	Product Advertisement Spam Emails were classified through content analysis
Heuristic_Spam_MaliciousIP	Mail sender's IP have a negative reputation (malicious)
Heuristic_Spam_NotoriousIP	Mail send by notorious IP
Heuristic_SPAM_EDUIMG	Spam with education pictures
Heuristic_Spam	Classified as spam and contains promotional and advertisement behaviors
Heuristic_Spam_AptPromotional	Mail contain malicious promotion which send from bad sender's IP
Heuristic_Spam_ContentCut	Mail contain bad content
Heuristic_Spam_ContentESV	Mail from bad sender, sender's IP and contain spam content.
Heuristic_Spam_ContentIP	Mail from bad sender's IP and contain spam content.
Heuristic_Spam_ESV	spam mail from abnormal sender or IP

Reason	Description
Heuristic_Spam_Education	Mail contain phishing educational spam
Heuristic_Spam_Financial	Mail contain phishing financial
Heuristic_Spam_Fraud	Mail contain fraud information
Heuristic_Spam_IBL	Sender IP in blacklist
Heuristic_Spam_IMG	Image spam from abnormal IP
Heuristic_Spam_MaliciousIP	Mail sender's IP have a negative reputation
Heuristic_Spam_NotoriousIP	Mail send by notorious IP
Heuristic_Spam_OB	Lots of spam mail in a short period of time
Heuristic_Spam_OOB	Lots of spam mail in a short period of time
Heuristic_Spam_OPorn	Generic pornographic spam mail
Heuristic_Spam_OUTBREAK	Lots of spam mail in a short period of time
Heuristic_Spam_OWretchIPOB	Lots of spam mail in a short period of time
Heuristic_Spam_Phishing	Mail contain phishing spam.
Heuristic_Spam_PhishingIP	mail contain phishing spam
Heuristic_Spam_Porn	generic pornographic spam mail
Heuristic_Spam_Promotional	mail obviously contain promotional spam
Heuristic_Spam_SenderMultiDNS	Sender used multiple domain and has bad reputation.
Heuristic_Spam_SenderSPFFail	Sender SPF record fail and contain spam format or content.
Heuristic_Spam_ViciousIP	Mail sender's IP have a negative reputation
Heuristic_Spam_Virus	Mail contain suspicious virus spam
Heuristic_Spam_WretchIP	mail sender's IP have a negative reputation
Heuristic_Spam_WretchIPOB	Lots of spam mail in a short period of time
Heuristic_Trash_Spam	Spam
Heuristic_ViciousIP	Mail sender's IP have a negative reputation
Heuristic_WretchIP	Mail sender's IP have a negative reputation
SPF	Sender failed to pass the SPF verification. Please check [Security > Antispam > SPF]
Sender Verification	Sender verification failed. Please check [Security > Antispam > Sender Verification]
Typical_Spam_IMG	Spam with pictures only
Typical_Spam_OB	Lots of spam mail in a short period of time
Typical_Spam_OOB	Lots of spam mail in a short period of time
Typical_Unfamiliar_Sender	Unfamiliar sender mail
Typical_Unfamiliar_URL	Unfamiliar sender mail and with suspicious URL

Reason	Description
empty_mail	Empty mail
spam_outbreak	Lots of spam mail in a short period of time
virus_outbreak	Suspected virus outbreaking spam

❑ Additional Information: Display the report status for this abnormal email. The users are able to report up to 50 emails at a time. The states include Reported as mis-categorized eDM(s)/valid email(s), The reported mis-categorized eDM(s)/valid email(s) has/have been processed by the system, Unable to report, The license has expired, and The local setting is set to quarantine or release, which will be shown in icons. Besides, the report states of Anti-BEC Emails are slightly different from the other abnormal emails. Thus, using the parentheses comment both of them.

● (Other Abnormal Emails)Reported as mis-categorized eDM(s)/valid email(s) 🔵: This icon means that the email(s) has/have been reported.

● (Anti-BEC Emails)Reported as spam(s)/valid email(s) 🔵: This icon means that the email(s) has/have been reported.

● (Other Abnormal Emails)The reported mis-categorized eDM(s)/valid email(s) has/have been processed by the system ✅: This icon means that the email(s) has/have been reported and processed by the system.

● (Anti-BEC Emails)The reported spam(s)/valid email(s) has/have been processed by the system ✅: This icon means that the email(s) has/have been reported and processed by the system

● Unable to report ⚠️: This icon means that the email(s) is/are unable to be reported due to an unknown reason.

● The license has expired ⚠️: This icon means that the email(s) is/are unable to be reported due to the license expiration.

● The local setting is set to quarantine or release 👤 : This icon means that the email(s) is/are set to be quarantined or released in the local settings and thus it can not be reported.

❑ Direction: The direction of the email will be displayed in this column, including Inbound (⬇), Outbound (⬆), Local (➡), and Relay (🔽).

❑ Recipient(s) (Resend Count): Displays the recipient(s) and the number of the resend count of the email. If the email has never been resent, it will only display the recipient.
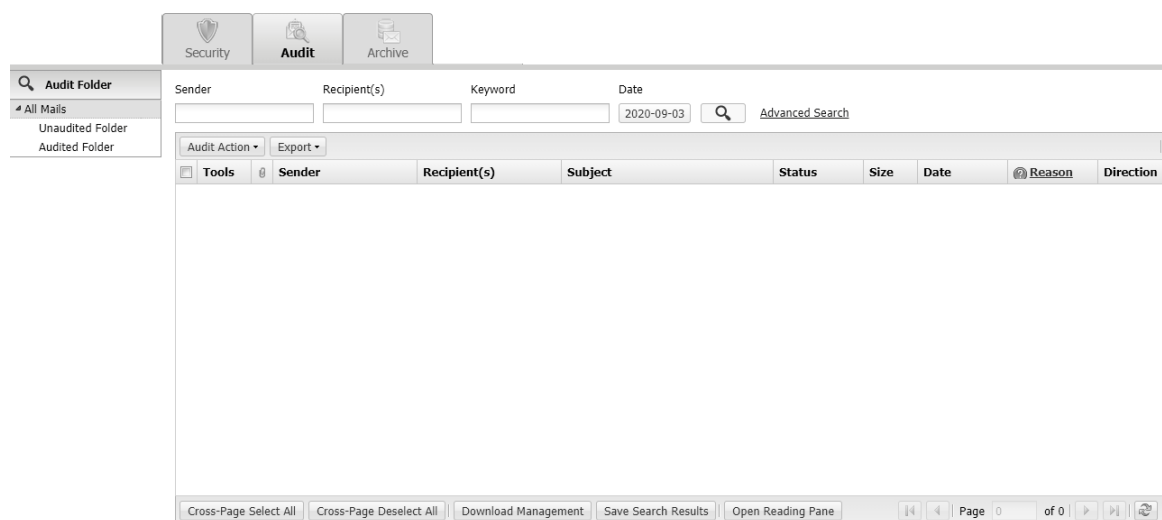
Part

VI

Chapter 6 Audit Folder

All the audit mails processed by the system will be stored in this Audit Folder. The Audit Folder contains "Unaudited Folder" and "Audited Folder."

Audit Folder

➢ All Mails: Click the "Audit Folder" subpage item to view the audit emails. There are "Unaudited Folder", "Audited Folder", and "History" subfolders.

➢ Audit Folder Display Area: There are email list, toolbar, and search filters on the right side of the page. The search filters include Sender, Recipient(s), Keyword, and Date.

➢ Mail Search Filters: The users are able to set the search filters for searching the desired mails in this folder. The search condition setting method is the same as the search condition setting method illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the Mail Search Filters sections.

➢ In the Audit Folder, the mail status comes with the following items:

❑ Pending: The mail is pending and no auditors are assigned to handle it. This mail will be approved or rejected only by the system administrator.

❑ Handling: The mail has been already in the audit flow and waited for the auditors to approve or reject.

❑ Reject: The mail has been rejected.

❑ Delete: The mail has been deleted.

❑ Release: The mail has been released.

❑ Encrypt and Approve: The mail has been cryptoed.

➢ The Audit Folder Toolbar contains"Audit Action", "Tag", "Export","Cross-Page Select All","Cross-Page Delect All","Download", "Save Search Result", and "Open Reading Pane" function buttons.

❑ Audit Action: Click the drop-down arrow to open the Audit Action menu. The following functions are included in the menu:

- Encrypt and Approve: Select email(s) and click this button, a confirm dialog box will pop up. Please enter comment and click Feedback to encrypt and approve the selected email(s).

- Approve: Select the email(s) to be approved and click this button, a confirm dialog box will pop up. Please enter comment and click Feedback to approve the email(s). The selected email(s) will be delivered to the mailbox of the original recipient(s).

- Reject: Select email(s) and click this button, a confirm dialog box will pop up. Please enter comment and click Feedback, and the system will stop delivering the email(s) and send reject notification to the original recipient(s).

- Delete: Select email(s) and click this button, a confirm dialog box will pop up. Please enter comment and click Feedback, the selected email(s) will be dropped. The system will stop delivering the email(s) and will not proceed to process.

❑ Tag: The users are able to tag the important emails and add them to the "Tag" folder. After tagging the emails, the users can find the tagged emails in the

"Tag" folder very quickly. (This button will be enabled or disabled according to the users' authorities.)

❑ Export: The setting methods of the "Export" function are the same as the setting methods illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the [Export](#) section in the "Abnormal Folder" chapter.

❑ Cross-Page Select All: Click this button to select all emails across all pages.

❑ Cross-Page Deselect All: Click this button to deselect all emails across all pages.

❑ Download Management: The setting methods of the "Download Management" function are the same as the setting methods illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the [Download Management](#) sections in the "Abnormal Folder" chapter.

❑ Save Search Results: Click this button, enter "Search Name" in the pop-up window, and click the "OK" button to save the search result. The saved search result will be shown in the mail folder list on the left side, and 100 records can be saved at most. To delete the saved search result, please click the "Delete" button beside the name of the saved search result in the mail folder list. The users can also delete all of the saved search results by clicking the "Delete" button beside the "Saved Search" folder. A confirm dialog box will pop up after click the "Delete" button, please click "Yes" to complete the deletion.

❑ Open Reading Pane/Hide Reading Pane: Select an email from the list and click the "Open Reading Pane" button to open the reading pane. The email content and header will be displayed in the reading pane, and the audit history of the email will be shown in the lower-right corner of the screen.

Audit History

➢ Audit Folder Display Area: The description of the Audit Folder columns is the same as the description of the Abnormal Folder columns, please refer to Chapter 5.
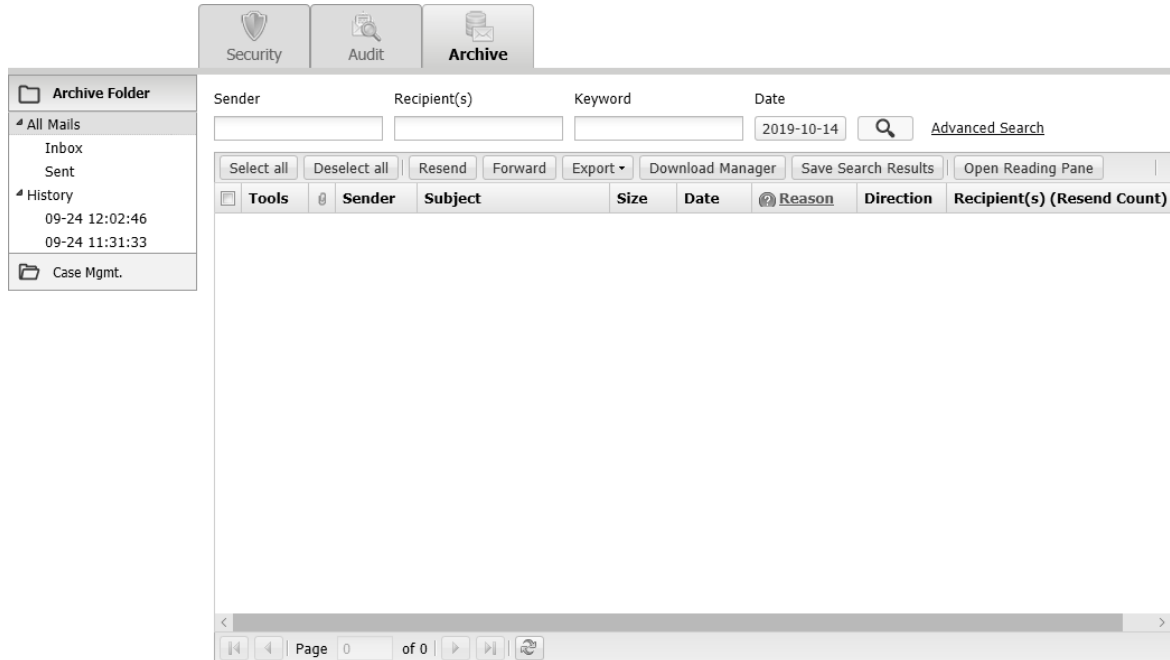
Part

VII

Chapter 7 Mail Archive

Cellopoint supports Mail Archive function, which contains two sub-function "Archive Folder" and "Case Mgmt." The users are able to click the "Archive" tab to access these functions.
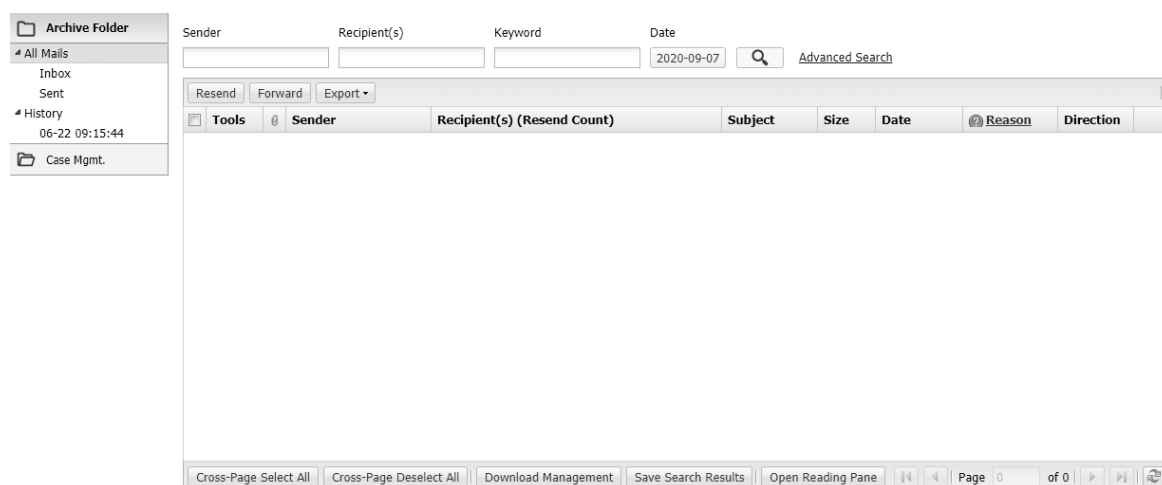

The Archive Page

➢ Archive Folder: All the archive mails processed by the system will be stored in the Archive Folder. It allows the administrators, auditors, and end users to quickly retrieve any email message stored in this folder. Cellopoint Mail Archive function supports Microsoft Exchange, VMware Zimbra and IBM Lotus Notes Journaling.

➢ Case Mgmt. (Only the users with Case Mgmt. License can use this function): The Cellopoint Mail Archive function also supports the "Case Management" feature. This feature helps you categorize your massive emails and clarify the correlations among cases and emails. It also helps you manage all kinds of cases by providing you comprehensive case planning, integrated process flow control and appropriate audit personnel allocation. Moreover, the Cellopoint Case Management feature provides a comprehensive case information viewing function, which integrates the case type, email content, flow control and audit level configuration. It not only helps you optimize the outcome of the case processing, but also quickly obtain massive valuable information and insights

from these crucial email contents. To sum up, the Cellopoint Case Management feature helps you determine better and faster decision-making actions for individual cases.

Archive Folder

All the archive mails processed by the system will be stored in this Archive Folder.

Archive Folder

➢ All Mails: Click the "Archive Folder" subpage item to view the archive emails. There are "Inbox", "Sent", and "History" subfolders.

➢ Mail Search Filters: The users are able to set the search filters for searching the desired mails in this archive folder. The search condition setting method is the same as the search condition setting method illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the Mail Search Filters sections.

➢ The Audit Folder Toolbar contains 8 function buttons: Audit Action, Export, Cross-Page Select All, Cross-Page Deselect All, Download Management (this function is available only for system administrators and users), Save Search Results, and Open Reading Pane, allowing the users to take further actions to the emails. The details are described below.

❑ Resend: Select the target mails and click the "Resend" button. The target mails will be resent to the users' mailbox.

❑ Forward: Select the target mails and click the "Forward" button. A forwarding dialog box will appear, allowing the users to fill the email address of the target recipients in the blank recipient column. After entering the recipient's email address, click the "Send" button to forward the target mail to the specified recipient.

❑ Tag: The users are able to tag the important emails and add them to the "Tag" folder. After tagging the emails, the users can find the tagged emails in the "Tag" folder very quickly. This button will be enabled or disabled according to the users' authorities.)

❑ Export: The setting methods of the "Export" function are the same as the setting methods illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the Export sections in the "Abnormal Folder" chapter.

❑ Download Management: The setting methods of the "Download Management" function are the same as the setting methods illustrated in the previous "Abnormal Folder" chapter. For details, please refer to the Download Management sections in the "Abnormal Folder" chapter.

❑ Save Search Results: Click this button, enter "Search Name" in the pop-up window, and click the "OK" button to save the search result. The saved search result will be shown in the mail folder list on the left side, and 100 records can be saved at most. To delete the saved search result, please click the "Delete" button beside the name of the saved search result in the mail folder list. The users can also delete all of the saved search results by clicking the "Delete" button beside the "Saved Search" folder. A confirm dialog box will pop up after click the "Delete" button, please click "Yes" to complete the deletion.

❑ Open Reading Pane/Hide Reading Pane: Select an email from the list and click the "Open Reading Pane" button to open the reading pane. The email

content and header will be displayed in the reading pane, and the audit history of the email will be shown in the lower-right corner of the screen.

➢ Archive Folder Display Area: The description of the Archive Folder columns is the same as the description of the Abnormal Folder columns, please refer to Chapter 5.

Case Mgmt.

The Cellopoint Mail Archive function supports the "Case Management" feature. This feature helps you categorize your massive emails and clarify the correlations among cases and emails. It also helps you manage all kinds of cases by providing you comprehensive case planning, integrated process flow control and appropriate audit personnel allocation. Moreover, this Case Management feature provides a comprehensive case information viewing function, which integrates the case type, email content, flow control and audit level configuration. It not only helps you optimize the outcome of the case processing, but also quickly obtain massive valuable information and insights from these crucial email contents. The users are able to click the "Case Mgmt." tab on the up-left menu bar to access this function. (Only the users with Case Mgmt. License are able to use this function.)

Case Mgmt.

➢ Case Management Operating Principles

The case management operating principles is to specify the archive mails to related cases and assign the case auditors to audit the archive mails. The auditors check the archive mails and see if they are correlated with the cases. During the audit flow, the auditors are able to add comments to help determine the appropriate follow-up processing and decision making as shown below:

Case Management Operating Principles
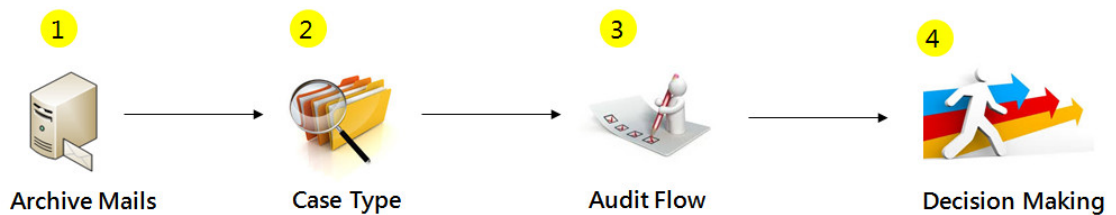
➢ Case Management Roles

A standard case management flow needs 4 roles to complete. These 4 roles are described below:

Case Management Roles
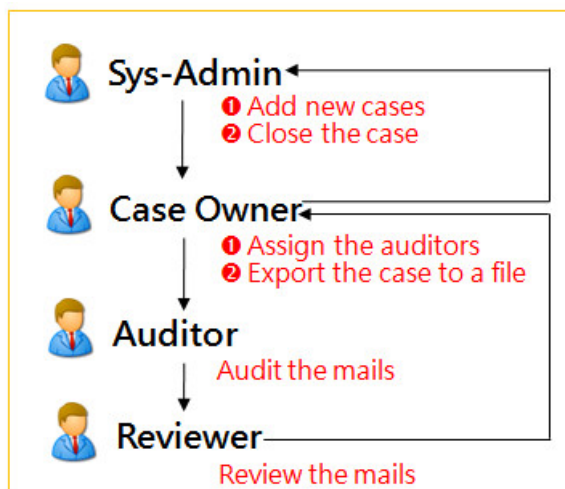
❑ Administrator: Able to add new cases, assign the cases, and close the cases.

❑ Case Owner: Able to assign the auditors and reviewers, add emails to cases, close the cases, and export the cases to files.

❑ Auditor: Able to view, audit, comment, and pass the mails.

❑ Reviewer: Able to view, audit, comment, and pass the mails.

The authority categorization of each role is listed in the table below:

Authority \ Role	To assign the auditors and export cases	To view the cases	To audit, comment and pass the mails	To add and close the cases
Administrator				V
Case Owner	V	V		
Auditor		V	V	
Reviewer		V	V	

Authority Categorization Table

➢ Case Management Process Flow

To successfully proceed a case management flow, first the System Administrator will have to add a new case (Step 1 in the following graphic) and then specify the Case Owner to take charge of the case (Step 2 in the following graphic). The case owner can then assign the auditor and reviewer of each case (Step 3 in the following graphic) because the current audit flow contains two tiers: the first tier is "Audit" and the second tier is "Review", and then the case owner can also assign the archive mails to the case (Step 4 in the following graphic). After assigning the auditor and reviewer, the mails assigned to the case will be delivered to the first tier auditor for auditing (Step 5 in the following graphic). When the first tier auditor finishes the auditing process, the mails will be delivered to the second tier review for further review (Step 6 in the following graphic). After the reviewer finishes reviewing the mails, he/she should notify the

case owner that the auditing process has completed. (Step 7 in the following graphic). The case owner can then export the case auditing results to physical files for backup records (Step 8 in the following graphic) and close the case. Or the case owner can notify the system administrators to close the case (Step 9 in the following graphic).
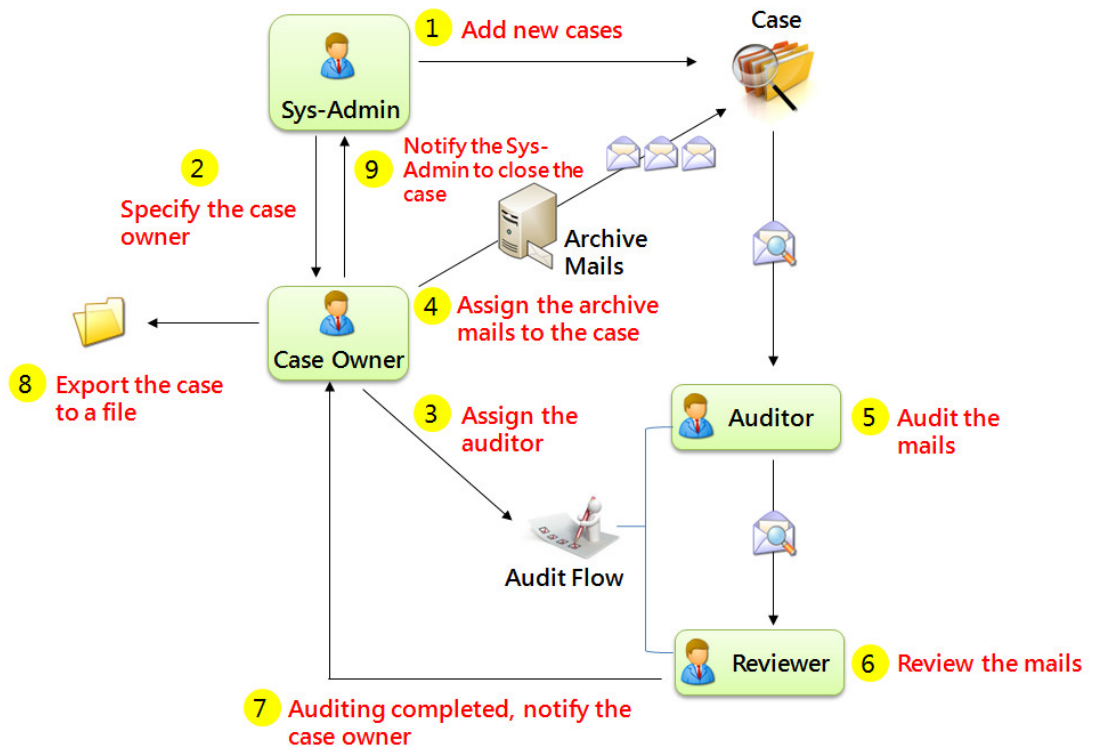
Case Management Process Flow

➢ Case Management Operation Methods

❑ Managing the Case as the Case Owner

● After the new case is created, the case owner of the new case will be able to see the case management page of the new case. Click the "Edit Case" button to open the case editing page. In the case editing page, the case owner is able to assign the auditor and reviewer to the new case. Click the "Add" button to select the appropriate personnel and click the "Save"

button to save the changes. The names of both auditor and reviewer will appear in the columns.

Case Editing Page

● Next, click the case name in the "Case Search" sub-folder at the left panel, a selectable archive mail list will appear on the screen. The case owner is able to select the related archive mails and add them to the new case. Check the checkbox to select the mails to be added and then click the "Add to Case" button in the toolbar on the top.

Adding Mails to the New Case

Case Mgmt.

- After adding the desired archive mails to the case, click the case name in the "Owner of" sub-folder to view the mail list. The case owner will also be able to view the mail auditing status in this page.

Mail List of the Case (Case Owner)

❑ Audit the mails of the case

- If the user is assigned to be the auditor of the case, the user will be able to see the listed mails waiting for auditing after logging in to the system. The user (auditor) is able to select the mail and click the "Open Reading Pane" button to view the mail content. Please notice that an audit display area will appear at the bottom right corner, showing both the Audit Actions and Audit History of this email. The user (auditor) is able to setup the audit action to and add comments in this window. The audit action options are "Unrelated", "Related" and "Cannot Confirm". The user (auditor) will have to choose one action from these three options. Also, the "Comment" column is a required column for the auditor to proceed the auditing. When finish the auditing, please click the "Save" button and then click the "Push" button to push the mail to the next tier reviewer.

Case Mgmt. Page of the Auditor

Mail List of the Case (Auditor)

❑ Review the mails of the case

● If the user is assigned to be the reviewer of the case, the user will be able to see the listed mails waiting for reviewing after logging in to the system. This only happens when the mails have been audited by the auditor of the case and then been pushed to the user (second tier reviewer). The user (reviewer of the case) will then see the listed mails waiting for reviewing. The user (reviewer) is able to select the mail and click the "Open Reading Pane" button to view the mail content. Please notice that an review display area will appear at the bottom right corner, showing both the Review Actions

and Review History of this email. The user (reviewer) is able to setup the review action and add comments in this window. The review action options are "Unrelated", "Related" and "Cannot Confirm". The reviewer will have to choose one action from these three options. Also, the "Comment" column is a required column for the reviewer to proceed the reviewing. When finish the reviewing, please click the "Save" button and then click the "Push" button to push the mail to the case owner.

Case Mgmt. Page of the Reviewer

Mail List of the Case (Reviewer)

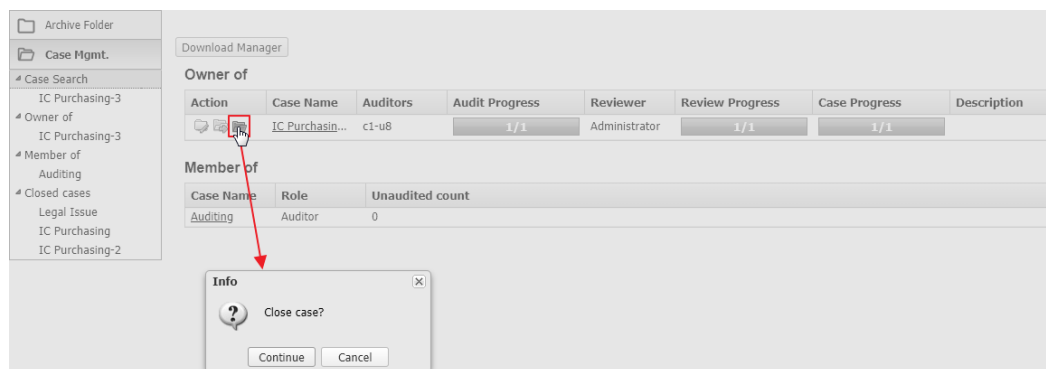❑ Export the case

● After the mails have been reviewed by the reviewer, the progress of the case will reach 100%. The case owner will then be able to determine whether to export the case to physical file or not. The file format options of the exporting are CSV file and HTML file. Click the "Export" button to export the cases to physical files.
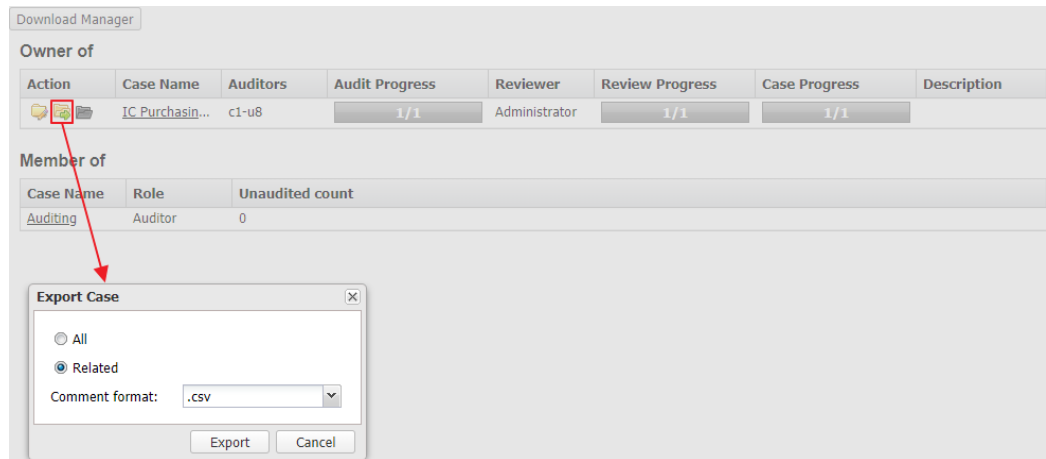
Export the Case (Case Owner)

❑ Close the case

● If the mails have been audited and reviewed by the auditors of each tier, the case owner and the system administrators will then be able to see the case progress and determine whether to close the case or not. If the case is confirmed to be finished, the case owner and the system administrator are both able to click the "Close Case" button to close the case.

Close the Case (Case Owner)