User Provisioning Options - How to Add Users

Situation	When a subscribing organization is using the Proofpoint Essentials service the minimum configuration is that one single domain is filtered by the Proofpoint Essentials service and adding users to the Proofpoint Essentials interface is an essential part of configuring a domain belonging to a subscribing organization. • You are a new customer and you have many email accounts to create in your new Proofpoint dashboard • You don't have the time to add all of them manually
Solution	In order to meet the needs of our subscribers, User Provisioning can be handled in a number of ways: • LDAP Discovery • SMTP Discovery • CSV Import • Manual Creation

LDAP Discovery

LDAP Discovery is the recommended method of adding user to the platform. This allows admins to import their users email addresses and security groups directly from a client's Microsoft Active Directory. LDAP Discovery is a one way synchronization for your protection and requires read only permission of an Active Directory server.

Please contact Microsoft support for any questions regarding your Active Directory settings.

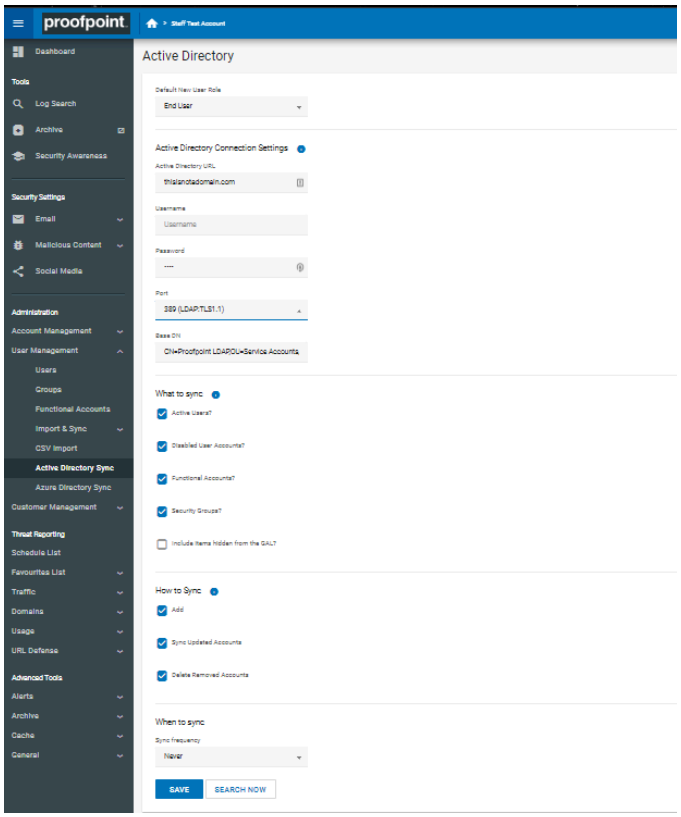
Configuration of LDAP discovery requires a basic understanding of Active Directory and requires some minor firewall modifications: see LDAP Discovery

Adding Users by Active Directory

1. Navigate to **User Management > Import & Sync > Active Directory Sync**.
2. From the *Default New User Role* dropdown, select the desired profile:
    a. **End Users** receive a welcome letter once added to the system. The welcome letter will include details about the quarantine email as well as login information to access the user interface.
    b. **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.
3. In the *Active Directory URL field*, specify the URL or IP Address to access the organization's Active Directory.

    Port 389 (LDAP) will need to be accessible to Proofpoint Essentials IPs in order for this method to be used.
4. Enter an Active Directory *Username* and *Password* that can be used to import email-enabled objects such as users, Security Groups and Distribution Lists.
5. Enter the *Base DN*.
    a. This is the LDAP query that Proofpoint Essentials will execute to capture all mail-enabled object information.
    b. If you do not know what your base DN is please consult your network administrator.
6. Under *What To Sync*, choose what items you would like to sync.
7. Under *How To Sync*, choose additional sync options (e.g. updated synchronized accounts, etc.).
8. Under *When To Sync*, choose if you would like to enable a daily sync between Proofpoint Essentials and the organization's Active Directory.
9. Click **Save**.

The Active Directory connection information will be validated and, if successful, a result set will be displayed for review. If the data is accurate, click Proceed to import the users. The Active Directory sync will overwrite previously created accounts along with their permissions. Therefore, you will need to update the organization admin account. Refer to the Manually Adding Users section in order to update user settings.



SMTP Discovery

Default method enabled, SMTP discovery will accept email traffic for non-registered users based on predefined settings (e.g. number of times where the SMTP address has been identified). It will also send out a weekly report to the organization administrator so that they can set the address as either invalid or active. SMTP Discovery will be disabled if LDAP 24 hour sync is enabled.

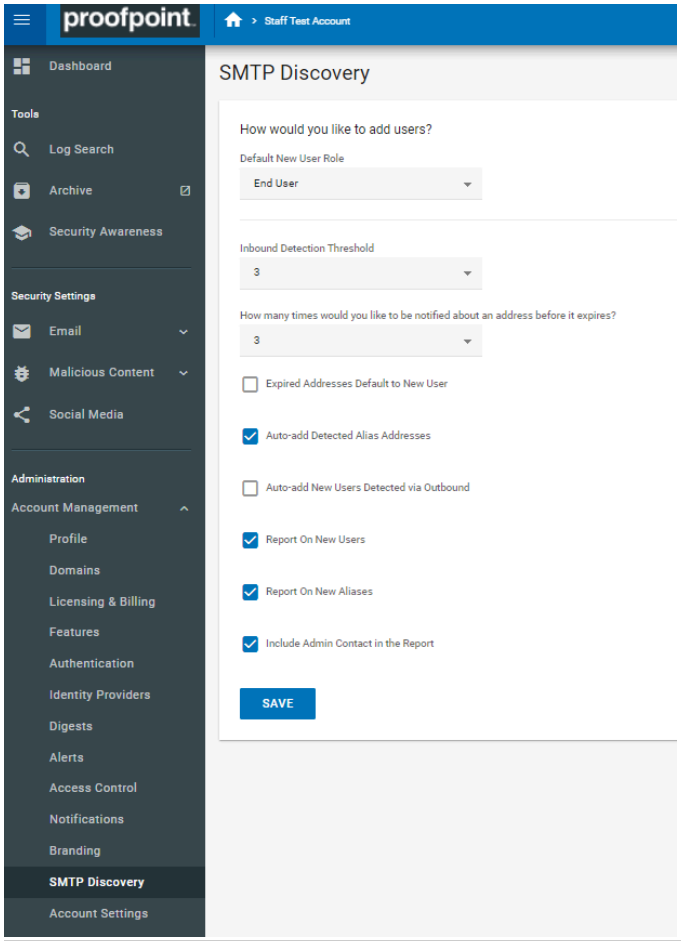
Adding Users by SMTP Discovery

1. Navigate to **User Management > SMTP Discovery**.
2. From the *Default New User Role* dropdown, select the desired profile.
    a. **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.
    b. **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.
3. 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.
How many times would you like to be notified about an address before it expires?	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 an admin contact in the report.

5. Click **Save**.



CSV Import

Due to the complexity of CSV Import it is only currently available to resellers. The current issue is with the possibility of overriding current list of users.

CSV text must be pasted into the dialog box under Management > CSV Import. And should be formatted *First Name, Last Name, Primary Email address*, followed by other addresses separated by commas.

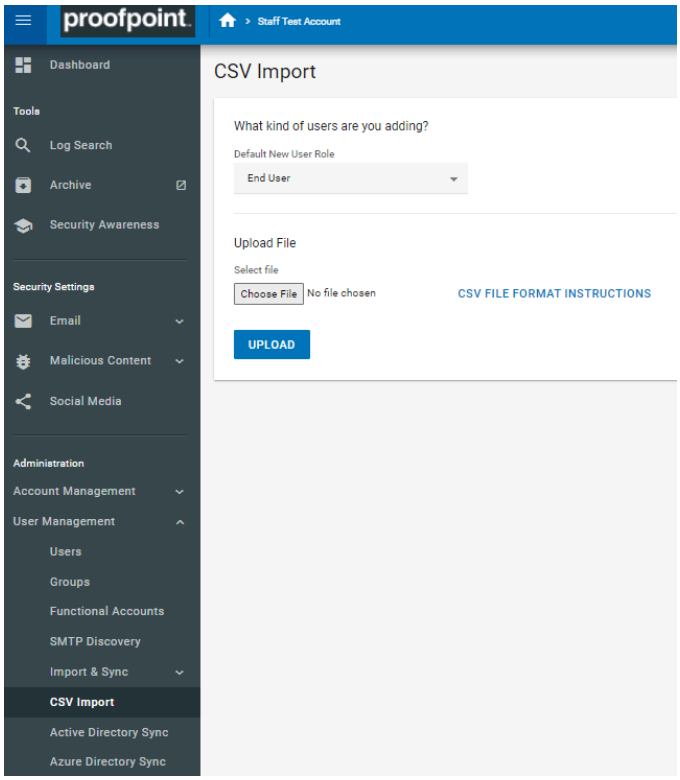
To load a CSV File

1. Navigate to **Administration > User Management > CSV Import**.
2. From the *CSV Type* dropdown, choose the standard option will be choosen.
    a. **Standard CSV**: A basic file format that includes first name, last name, primary email addresses and aliases.

You can view an example of the file format you selected to import by clicking on the CSV File Format Instructions.

3. From the *Default New User Role* dropdown, select the desired profile.
    a. **End User**: Receive the quarantined digest and can login to the Proofpoint Essentials user interface.
    b. **Silent User**: Receive the quarantine digest and are not granted access to login to the Proofpoint Essentials user interface.
4. Click **Choose File** and locate file you wish to import.
5. Click **Upload**.

    Once you upload the file, the system will report the number of successful or failed entries imported. If there are errors reported, review the message and repair the file as instructed. Successful addresses will be imported and visible under the **Administration > User Management > Users**.



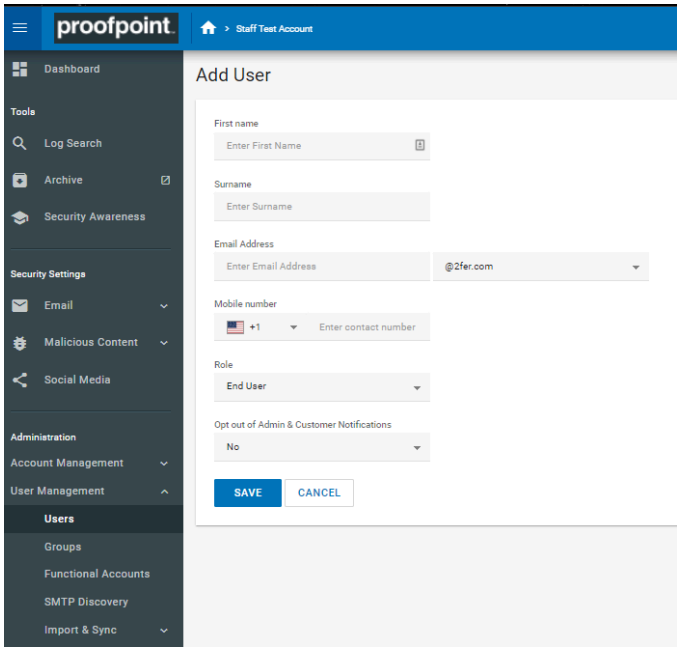
Manual Creation

Manual creation allows for the individual creation of user accounts and assignment of aliases as well as the elevation of user privileges.

1. Navigate to **User Management > Users**.
2. Click **Add a User**.
3. Enter the appropriate *User Profile* information, such as:
    a. *First name*.
    b. *Surname*.
    c. *Email address*.
    d. *Mobile number*.
4. From the *Role* dropdown, select the desired profile.
    1. **End User** - will 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.
    2. **Silent User** - will 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.
5. Enter a password for the user (Optional).
6. Click **Save**

New users are registered every half-hour. Mail will not flow to the new user until the change is propagated through the

environment (Up to 60 minutes). If *SMTP Discovery* is enabled, users will be able to receive email immediately.



Question & Answer

Q. Can I have an admin account without a license?
A. Organisations are required to have one Org Admin account upon creation of a customer account. If this admin account is not required, or another user should fill the role. This change can be made after the account has been created