RELEASE DATE:

2024/09/11

Email Protection Migration

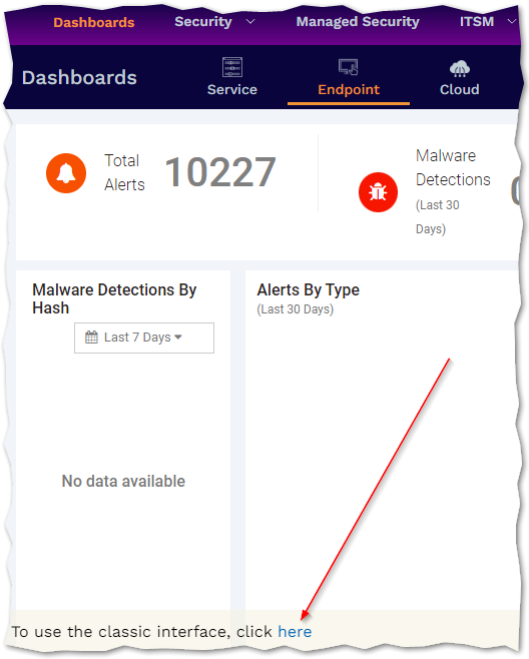
Version 1.2

Portal Overview

Portal Login

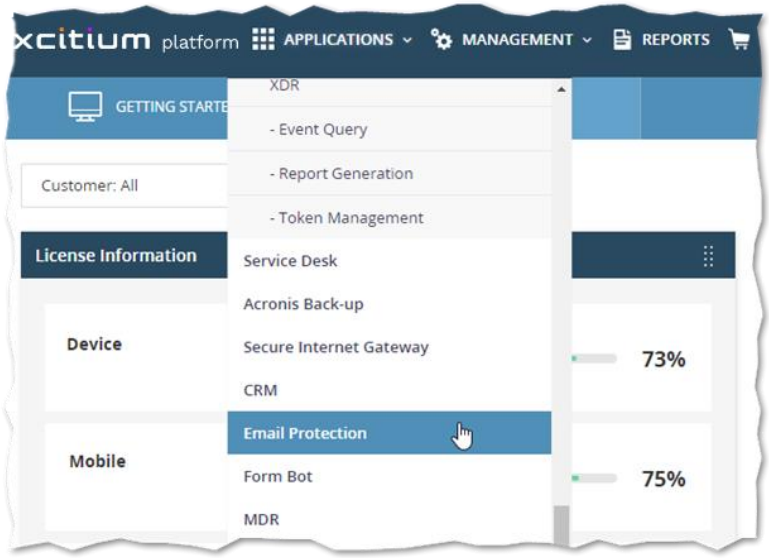
Navigate to the portal to login using one of the following addresses: -

https://platform-us.xcitium.com/app/login	US Instance for MSPs
https://platform.xcitium.com/app/login	EU Instance for MSPs
https://enterprise.platform.xcitium.com/login	US Instance for Enterprises
https://enterprise-eu.platform.xcitium.com/login	EU Instance for Enterprises

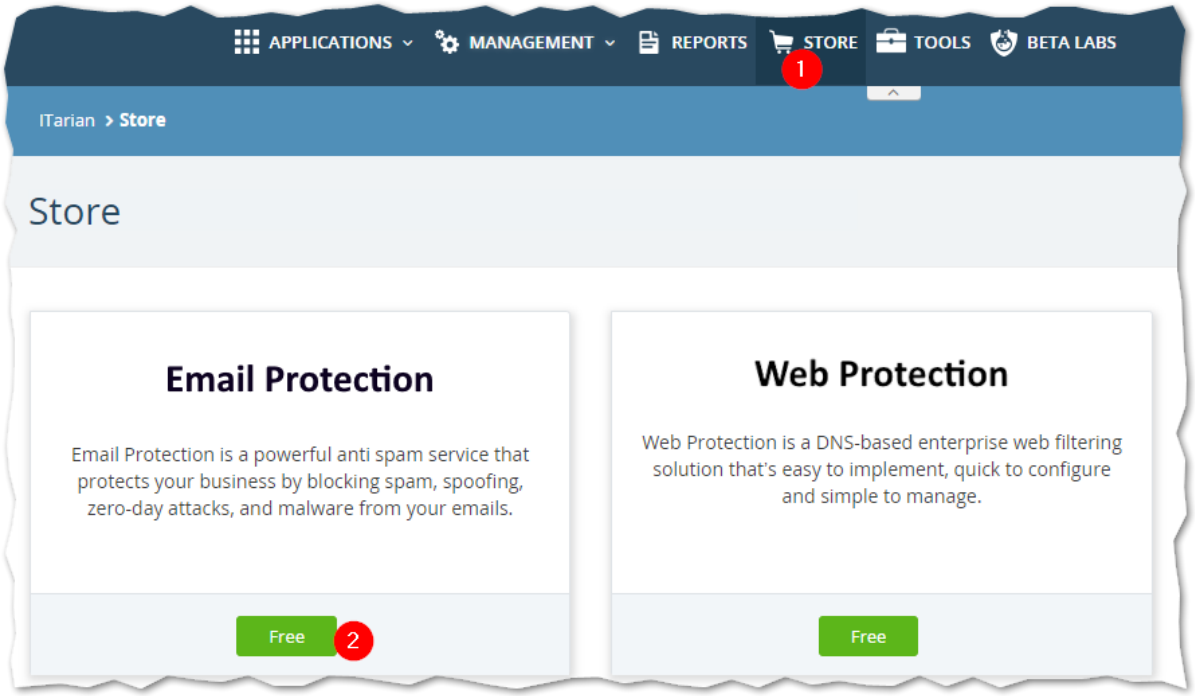


After a successful login, you will first have to switch to the classic interface by using the following link. If this link does not appear please clear your internet cache and re-login.

Once at the classic interface you should be able to see the app of Email Protection under the applications menu, click on this open the new Email Protection application as shown below.

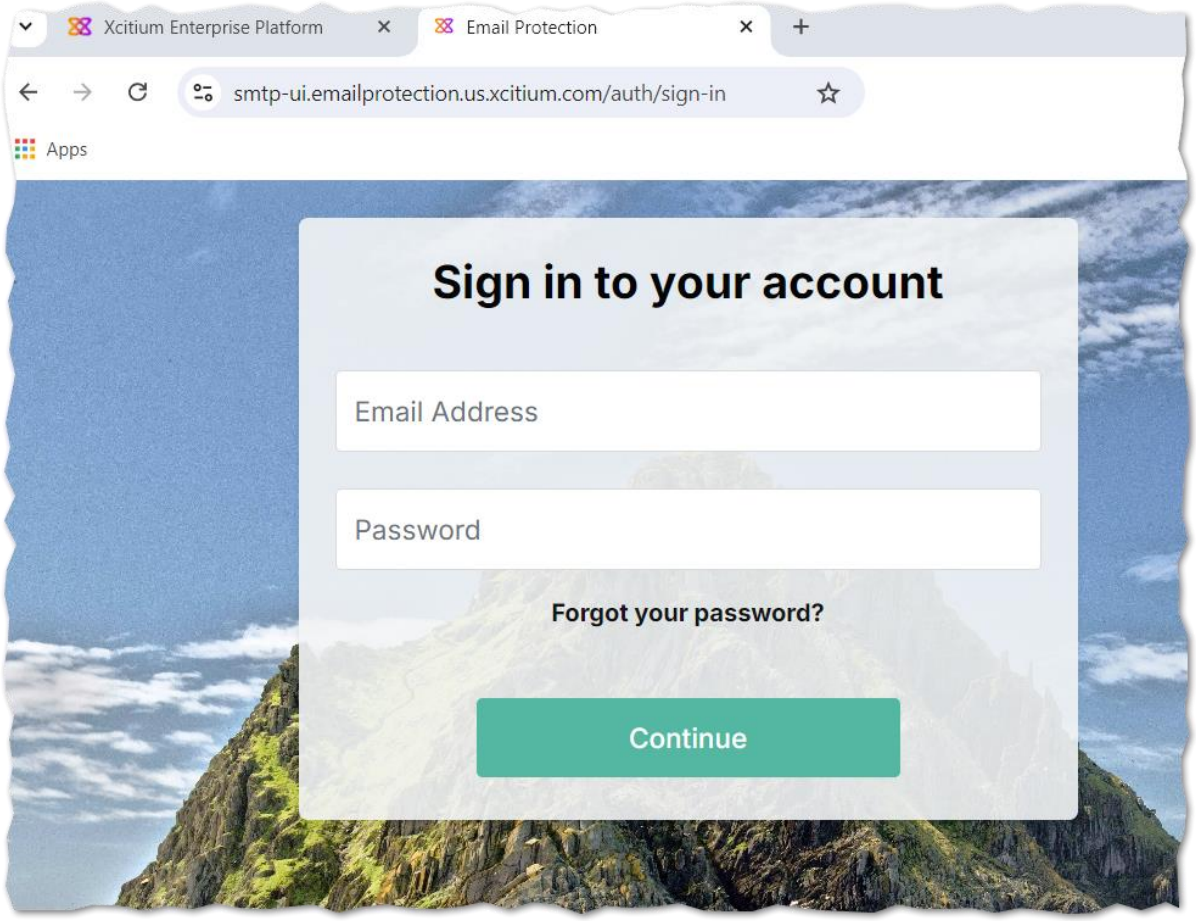


If you do not see this option in the menu, please navigate to the store and add this to your portal using the free purchase.



After the purchase from the store, you should now see the menu item appear as described above.

This will now open a new web browser tab displaying the login screen for the new Email Protection platform.



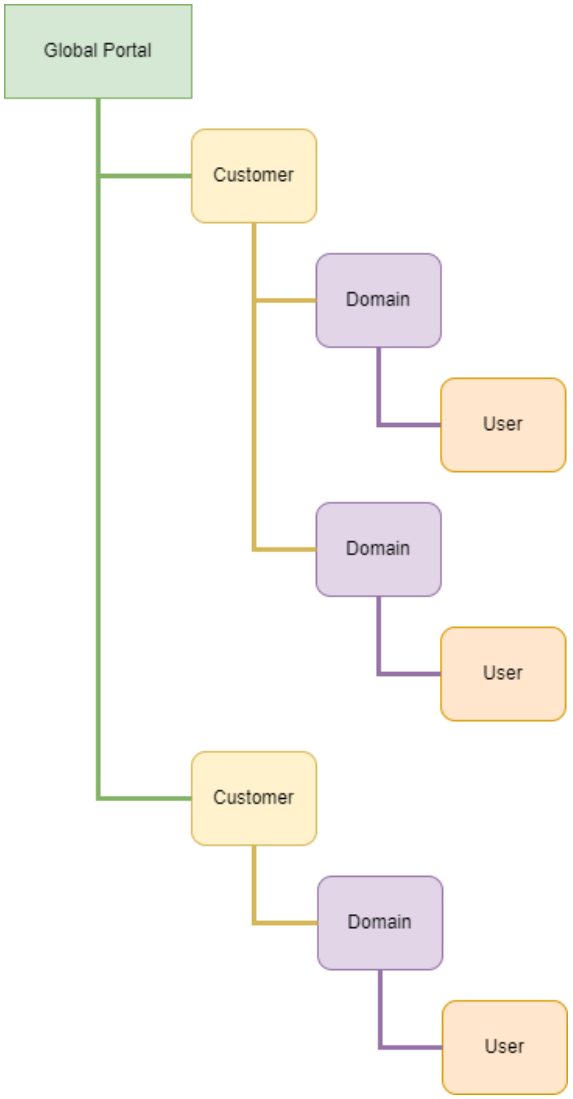
The login details for this will have already been sent to your portal administrator via email, if you do not have these please raise a support ticket via email to support@xcitium.com so they can get this password reset.

Portal Structure

Once you in the portal, you will be presented with an overview screen showing details of all your customers.

In this system, if you're an Enterprise client you are a customer of yourself, this gives a simple use method across both client types and introduces flexibility as Enterprises can add multiple "customers" for different countries, mergers etc.

Below is a diagram showing the structure of the portal and the levels you can navigate to:



As you navigate down the levels the overview screen's data gets limited to its child data giving you a more precise view.

Navigating down this tree also gives more settings you can apply for filtering and blocking.

Part of the migration will bring in your existing settings, but as Secure Email Gateway (SEG) did not have details about customers we have generated these for you based on the domain name.

So, if you had the domain of **Xcitium.com** you will get a customer called **Customer Xcitium.com** which then has the domain of **xcitum.com** under it.

Data Verification

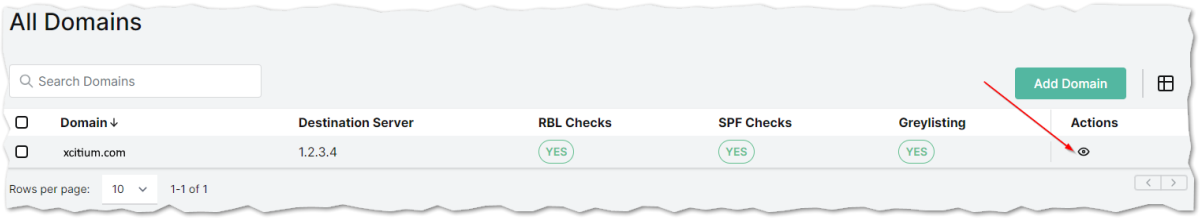
Customer Verification

1. Navigate to the **Global Portal** level
2. Scroll down the overview screen until you see **All Customers**
3. Click the pencil next to the customer you are verifying

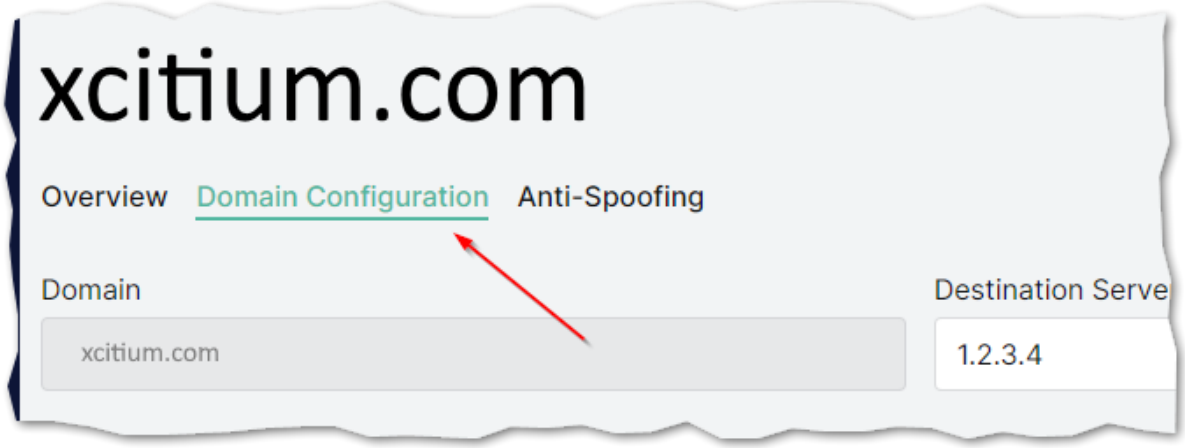
4. Edit the Name and Description as required and click on Save changes to proceed

Domain Verification

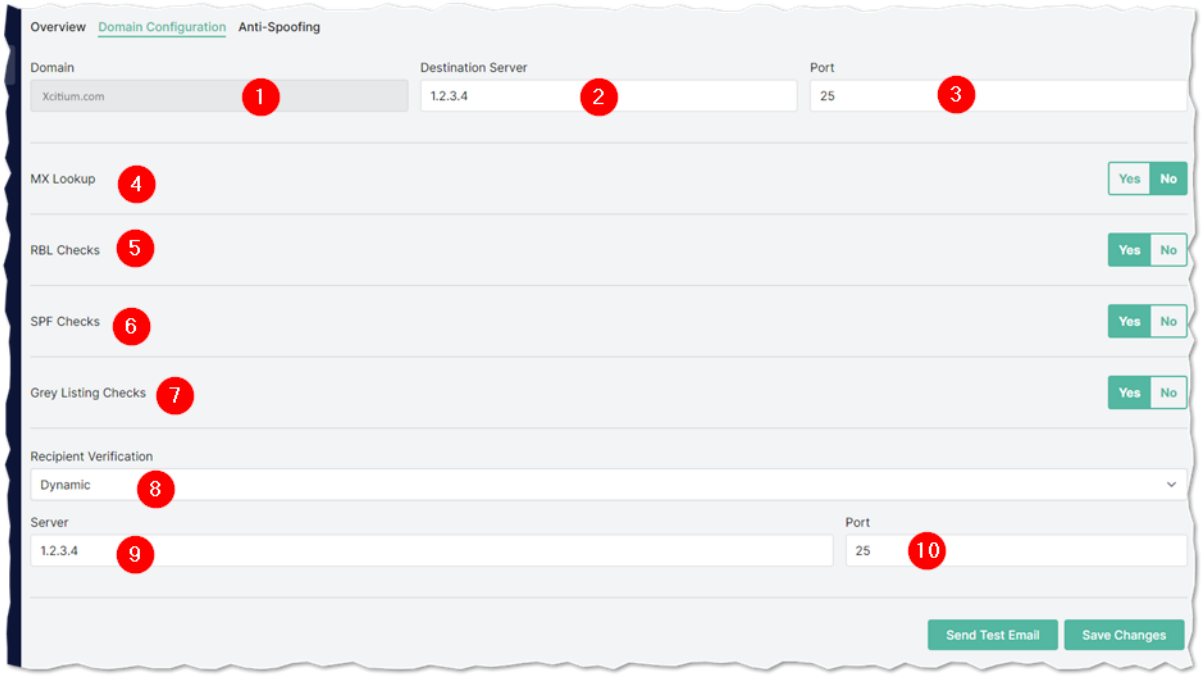
1. Navigate to the **Customer** level
2. Scroll down the overview screen until you see **All Domains**
3. The domain list shows you the base settings, but click on the eye symbol to open so changes can be made



4. Once the domain is open click on Domain Configuration at the top of the screen



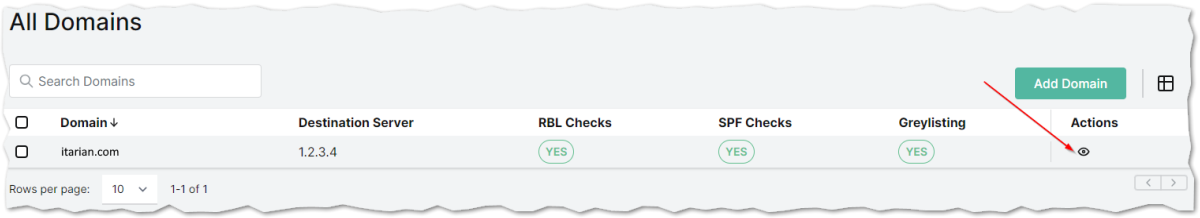
5. Now verify the details below



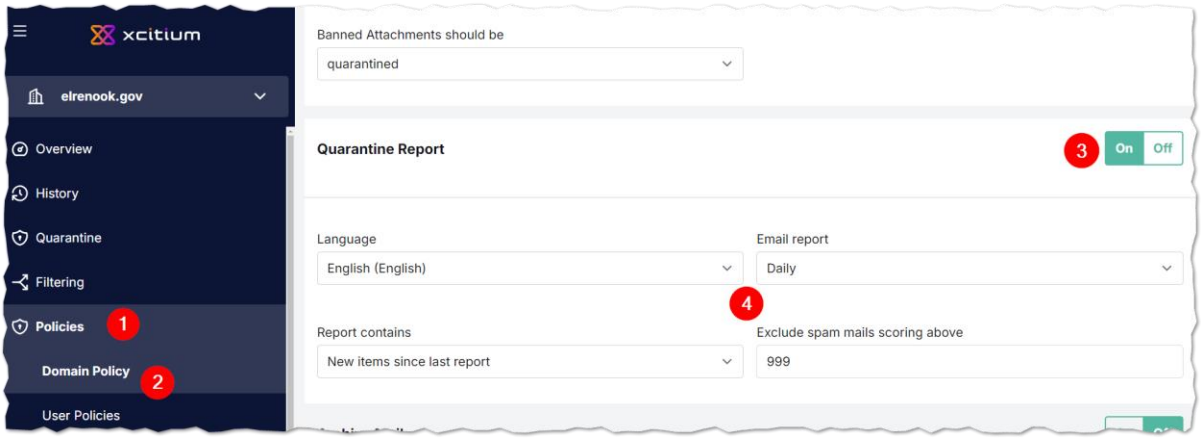
1. Double check you are looking at the right domain
2. Destination server is the IP or A record of the email platform we delivery to after a message has successfully been scanned and deemed clean
3. The port the destination server uses for incoming email, this is traditionally 25
4. MX Lookup is a special setting for extremely complex setups, recommended and default is NO as this meets the requirements for 99% of email setups. See our documentation if you need this
5. RBL Checks is default YES as this reduces time on scanning emails from known spammers as well as increasing accuracy
6. SPF Checks is default YES to prevent emails from non-authorised senders
7. Grey Listing is default NO, this technique of temp blocking all emails for a period is a great method of stopping and reducing spam but can cause major delays with emails. During the migration process it is not recommended to enable this to start with, once you have confirmed all services are working this setting can be looked at later
8. By default, we configure Recipient Verification as DYNAMIC so we lookup the user from the provided server, this allows us to quickly check to see if the end user exists or not during the spam assessment process
9. Verification server is 99% of the time the same as the destination server, as this is the case we have populated this uses those details from SEG
10. Verification port as in point 9 is using the destination server's port

Enabling Quarantine Report

1. Navigate to the **Customer** level
2. Scroll down the overview screen until you see **All Domains**
3. The domain list shows you the base settings, but click on the eye symbol to open so changes can be made



4. Once the domain is open follow the below steps to turn on quarantine reports



   i. Click on **Policies** to expand the menu
   ii. Click on **Domain Policy** to open the domain policy options in the right-hand panel
   iii. Scroll down to the **Quarantine Report** heading and click **On** to activate the option and expand the settings
   iv. Configure the settings as required

Click on **Save** to commit the changes made

Finalizing Migration

Once the domain(s) have been verified to be correct, then you can look at altering the MX records of your email service to point to this new filtering platform.

> *Before you do this, if you have added any rules to lock down your email service to only allow delivery from SEG then please remove that first, else you will lose emails.*

Before moving on it is recommended to perform an email test from the domain edit screen as shown in Domain Verification step 5, a successful test will prove communication is working as intended.

To make processing the MX easier, we have put together a bunch of guides in our documentation on how to configure some of the most popular domain providers, if your provider is not listed, please consult your provider and give them the required information from our documentation.

https://help.itarian.com/topic-150002-1-150004-150089-Change-your-MX-Records.html

If you would like to learn more or tweak the system, please visit our help guides located at the following URL https://help.itarian.com/product-150002-Email-Protection.html

But if you are experiencing difficulties, please reach out to our support team on support@xcitium.com