



Mailbox Manager

Mailbox Manager Guide

Version 24.3.1

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Revision History

Rev.	Date	Description
01		Initial document
02	Aug. 2020	Revision
03	May 2021	See What's New .
04	June 2021	Anthology product renaming/rebranding
05	Oct. 2021	Updates for version 21.11. See What's New .
06	Dec. 2021	Updates for version 21.13. See What's New .
07	Feb. 2022	Updates for version 22.2. See What's New .
08	Apr. 2022	Updates for version 22.4. See What's New .
09	Jun. 2022	Updates for version 22.7. See What's New .
10	Nov. 2022	Updates for version 22.12. See What's New .
11	Dec. 2022	Updates for version 22.13. See What's New .
12	Mar. 2023	Updates for version 23.3. See What's New .
13	Aug. 2023	Updates for version 23.9. See What's New .
14	Mar. 2024	Updates for version 24.3. See What's New .
15	Mar. 2024	Updates for version 24.3.1 See What's New .

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Get Started

Mailbox Manager provides simplified communication, automated and ongoing monitoring, and detailed message and download tracking. This tool is configured to communicate efficiently with the U.S. Department of Education (ED or Department) to reduce the average number of steps it takes to prepare files for transmission and download.

Mailbox Manager provides the option to set an automatic FTP or Azure Cloud Storage file transfer to and from the institution's Student Information System (SIS), or simply upload/download file(s) within the web application. Users can easily upload files by selecting the message class, selecting the TG number The TG number (also referred to as the mailbox, SAIG mailbox, and Destination Point mailbox) is the number assigned to your institution when your institution enrolls in the Student Aid Internet Gateway (SAIG). A TG number is the identifier for the electronic mailbox. It is a five-character alphanumeric string preceded by "TG", such as TGA0001., adding notes, or setting a pre-determined schedule. Based on a directive, message class files are then sent to the Department within minutes of transmission for designated processing.

Receipt of message class file(s) from the Department is simplified as Mailbox Manager auto-refreshes the SAIG portal every thirty minutes to place received files in the Message History for unlimited storage of data. Transmission to the Department from an institution's mailbox is every ten minutes.

What's New

[Release Notes for Mailbox Manager](#) (logon required)

Version 24.3.1

- Updated [FT Accounts](#).

Version 24.3

- Updated User Administration section and added [FT Accounts](#).

Version 23.9

- The "Manual Password Update" is now available under "User Associate Settings" for General accounts. See [TG Accounts](#).

Version 23.3

- Removed the word "Send" from the encryption options on the [Application Configuration](#) screen.

Version 22.13

- Revised [User Accounts](#): Users can now search user accounts by full or partial Name.

Version 22.12

- Revised [User Accounts](#): Users can now add or edit a user account without selecting a value in the [Assigned Mailbox Selection\(s\)](#) field.
- Revised [TG Accounts](#): Users can now add or edit a TG account without designating associated user accounts as Primary or Secondary DPA. However, to enable/validate the TG account, there has to be at least one (1) associated user account marked as Primary DPA.
- The File Naming Convention options displayed on several pages now provide tooltips.
- The tooltips for Directory Path fields now display examples.

Version 22.7

- Updated password expiration notification for TG accounts with [Manual Password Update](#) option.

Version 22.4

- [Azure Storage Export Schedule and Settings](#) and [Azure Storage Import Schedule and Settings](#): Account Key, Account Name, and File Share Name fields are not displayed in a multi-tenant environment.
- Added password expiration notification for TG accounts with [Manual Password Update](#) option.

Version 22.2

- Removed Password fields from the Create and Edit Account pages ([User Accounts](#)).

Version 21.13

- Updated [TG Accounts](#) page.

Version 21.11

- Tooltips added to [New Encryption Key Pair](#) page.

June 2021

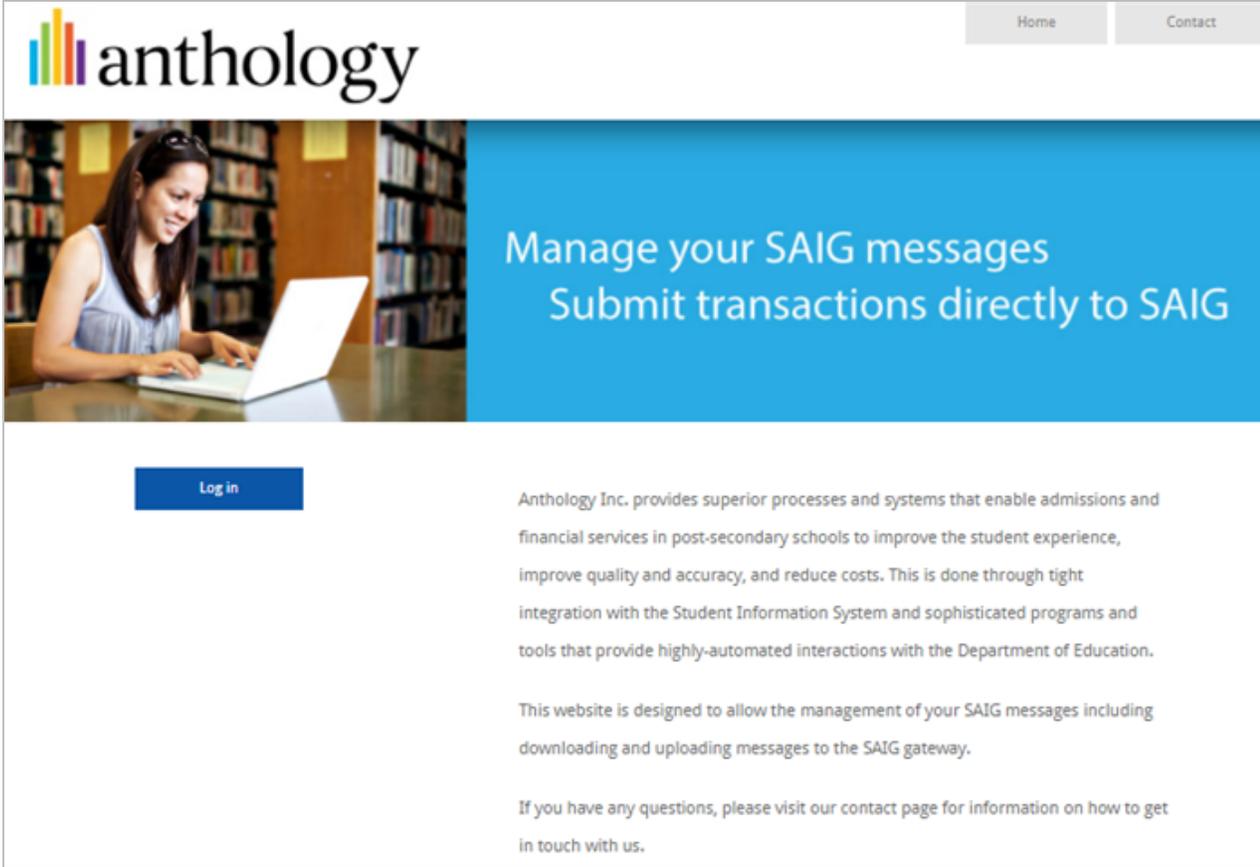
- Rebranding from Campus Management Corp. to Anthology Inc.

May 2021

- Message History:
 - Added [Batch Number](#) column.
 - Added [Export Message Records](#).
- Roles:
 - Added [Is Admin](#) option on the New Role page.
 - Added [Role Permissions](#):
 - Can Access/View FTP/Azure Download configuration
 - Can Manage FTP/Azure Download configuration
- TG Accounts:
 - Added [Manual Password Update](#) option.
- FTP/Azure Import and Export Schedule and Settings:
 - Updated images to show [Ftp Storage Directory Path Settings](#) fields.
 - Added details about [Additional Directory Paths](#).
 - Added [Automate removal of empty folders](#) option on export settings.
- Added [Azure Storage Configuration](#).
- Updated [Application Configuration](#) fields to match the UI.
- Added [FTP/Azure Download Configuration](#).

Sign In and Sign Out

The first page you see is the main landing page, which gives you general information about Mailbox Manager. It also provides a navigation bar to go from one section of the Mailbox Manager user interface to another.



UI Option	Usage
Home	Select to return to the Mailbox Manager landing page.
Contact	Select to go to the Anthology Inc. contact information page and for contextual help.
Log in	Select to log in to your Mailbox Manager account.
Log off	Select the Log off link to log out of the Mailbox Manager and return to the login page.

Sign In

To sign in to the Mailbox Manager, enter your **Username** and **Password**, and then select the **Log in** button.

If you want to have your credentials remembered the next time you log in, select the **Remember me?** check box. The system will save your credentials for future logins.

If you have forgotten your password, or you are a first-time user, select the **Forgot Password** link. Enter the email address you registered with. An email will be sent to you with instructions to reset your password.

Log in to your account

User name

Password

Remember me?

Log in

[Forgot Password](#)

Restricted. All system access is monitored.

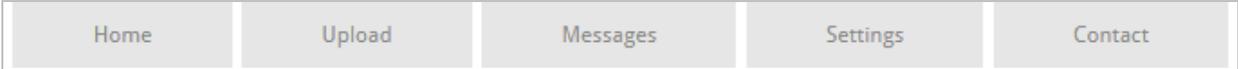
Sign Out

To sign out, select the **Log off** link at the top right of any page on the Mailbox Manager site.

Welcome [SysAdmin](#) | [Log off](#)

Navigation Bar

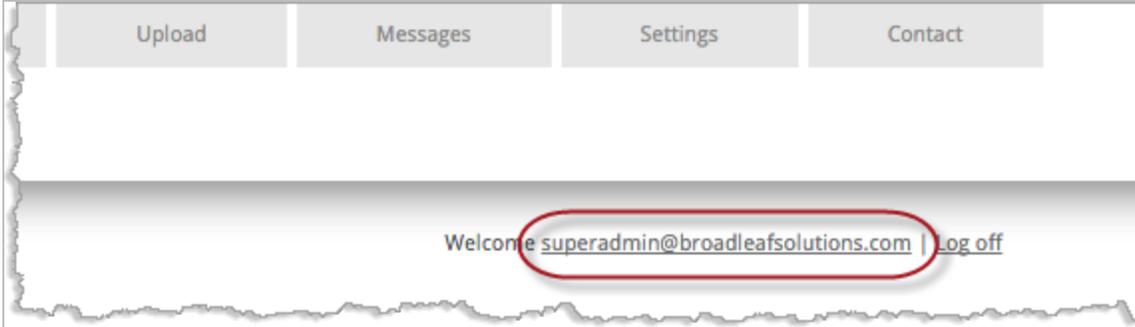
After you log in, use the navigation bar to access different components of Mailbox Manager.



Component	Usage
Home	Landing page for Mailbox Manager If you are not logged in, selecting Home displays the Mailbox Manager landing page.
Upload	Upload your SAIG messages.
Messages	Search, filter, and view your message history.
Settings	Configure user administration and configuration options.
Contact	Anthology Inc. contact and information page.

My Profile

When using Mailbox Manager, your current login username is displayed at the top-right of the page. Select your login name to open your profile page where you can view and edit your profile information.



You can modify your user profile directly from any Mailbox Manager page. You can modify your name details, your notification email address, and your file naming convention for downloaded files.

You can also update the password for your account.

To update your profile:

1. Select the username link at the top-right corner of the Mailbox Manager page.

Important: The username and the email address may be the same. Check with your administrator.

2. On the My Profile page, update the parameters as needed for the User Profile.

Important: The username is read-only after the initial account creation.

My Profile

User Profile

First Name

Middle Name

Last Name

Username

Notification Email Address

[Change Password](#)

User Settings

File Naming Convention:

Serial Number Extension (.dat file) ⓘ

Standard Format (.txt file) ⓘ

TG Number	Description	Last Password Change	Change TG Account Password
TG66400	Florida Career College	11/16/2020 12:02:38 PM	
TGZ1265	test	3/18/2021 9:41:34 AM	Change Password

- If you need to update your password, select **Change Password** on the My Profile page. In the dialog, enter the Old Password and new Password. Enter the new password a second time to confirm it.

Change Password [X]

Old Password

Password ⓘ

Confirm Password

Important: The password must be at least eight characters and must contain at least one uppercase letter, lowercase letter, number (0-9), and a special character. Previously used passwords are not prohibited.

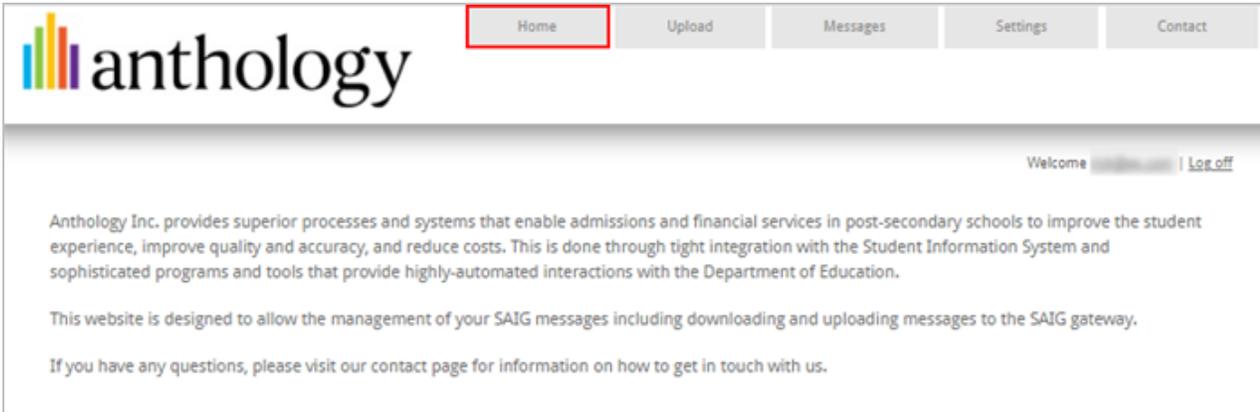
- Select the **Change Password** button to complete the password update.

5. In the **User Settings** section of the My Profile page, choose one of the following the File Naming Convention for your account:
 - **Serial Number Extension** orders the file by message class and count. The first message will have the extension of 001. Subsequent message classes will be ordered in sequentially as they process into the mailbox. The extension format is 001.DAT, 002.DAT, etc.
 - **Standard Format** uses a simple Message Class + Year-Month-Day-Hours-Minutes + Message ID + File Extension construction.
6. Select **Save**.
7. TG numbers associated with your user account are listed at the bottom of the My Profile page. The list includes inactive and active TG accounts.

A user with "Allow user to Add/Edit TG Accounts" permissions can change the TG account password.

Home

After you log in to Mailbox Manager, the Home page provides you with general information about Mailbox Manager. There is a [Navigation Bar](#) at the top of the screen, which you use to navigate from one area of Mailbox Manager to another.



Upload Files

When you select **Upload** in the navigation bar, the application displays the SAIG / COD Message Class Transmittal page. You can manually upload messages to the Student Aid Internet Gateway (SAIG) / Common Origination of Disbursement (COD) using this page, which includes basic instructions for this process.

Important: Pay close attention to the instructions. The file should be in ASCII text format with CR/LF endings.

The screenshot shows the Anthology web interface. At the top, there is a navigation bar with buttons for Home, Upload (highlighted with a red box), Messages, Settings, and Contact. The main content area is titled "SAIG / COD Message Class Transmittal" and includes the following elements:

- Instructions:**
 1. Choose the correct message class type for your outgoing transmittal.
 2. Choose the mailbox you wish to process this message class.
 3. Select the file by choosing 'Browse' and selecting the appropriate local file. Files should be in ASCII text format with CR/LF line endings.
 4. Click Upload to transmit your file to the system.
 5. Verify the system accepted file – system will show 'Message Accepted' once the file has been successfully uploaded.
- Message Class:** A dropdown menu with the text "Please make a selection".
- Outgoing Mailbox:** A dropdown menu with the text "Please make a selection".
- Notes (Optional):** A large text area for entering notes.
- Choose the files to upload:** A button labeled "Choose Files" and a status indicator "No file chosen".
- Upload:** A button to submit the file.

At the bottom of the form, there is a disclaimer: "For your file to be processed successfully by the Department of Education, it must conform to the specification of the message class as defined by the DOE, otherwise it may be rejected. Accepted files can take up to an hour to transmit to the DOE. All upload activity is audited. Please submit a helpdesk ticket to Anthology Inc. support if you encounter any issues uploading your messages to the system. You can view the transmitted files once processed under the 'Messages' menu."

Field/Button	Usage
Message Class	<p>Set this option to specify the type of message transmitted.</p> <p>These message classes are specified by the U.S. Department of Education. When a new message class is offered, or changes are made to an existing message class, Anthology Inc. adds, removes, or changes the message class list accordingly.</p>

Field/Button	Usage
Outgoing Mailbox	<p>Choose the outgoing mailbox to use for the transmittal.</p> <p>If your user account is not associated with a TG Account/Mailbox, you cannot send outgoing messages.</p> <p>The available TG Accounts/Mailboxes are created and maintained in Settings > User Administration > TG Accounts.</p>
Notes	(Optional) Enter any relevant notes about the message transmittal in the text box.
Choose Files	Select this button to locate and select the file that contains the message files to send.
Upload	Select this button to start the message upload process.

Message History

When you select **Messages** in the navigation bar, you can view and search your SAIG message history. This history includes both incoming and outgoing mail. The [Search Criteria](#) provides tools to filter the displayed list. You can also [download selected messages](#) from this page. If your user account does not have an assigned Mailbox/TG Number, the SAIG Message History page will not display any messages.

This functionality requires the following permissions for your assigned role:

- Can Access/View the Messages Tab
- Can Download Message Class File
- Can Search for Message History

SAIG Message History

Search Criteria

Class Group: All | Mailbox: All | Message Class: All | Sender Type: All | Direction: All | Downloaded: All | Start Date: 5/15/2021 | End Date: 6/14/2021 | Search

Download Checked | Export Current Page | Export All Rows | Total Records: 111 | Records Per Page: 10

Direction	Message Class	Description	Sender Mailbox	Receiver Mailbox	Document ID	Batch Number	Received Date	Download System	Received Date	Sender Notes
<input type="checkbox"/>	Out	CORR1BIN	Corrections	TGZ1267	TG50002		6/10/2021 5:52:44 PM			System
<input type="checkbox"/>	Out	AGRQ11IN	ACG DATA REQUESTS	TGZ1267	TG71900		6/10/2021 5:52:39 PM			System
<input type="checkbox"/>	In	ISRF21OP	ISIR Data - Requested	TGZ1267	TG50002	00020201216	6/10/2021 5:38:35 PM		5/28/2021 3:35:26 PM	SAIG
<input type="checkbox"/>	In	DEMOPWOP	BORROWER DEMOGRAPHICS - FIXED WIDTH	TGZ1267	TG50012	00000000000000000000	6/10/2021 5:38:35 PM			SAIG
<input type="checkbox"/>	In	ISRF21OP	ISIR Data - Requested	TGZ1267	TG50002	00020201216	6/10/2021 5:38:35 PM	✓		SAIG
<input type="checkbox"/>	In	ISRF21OP	ISIR Data - Requested	TGZ1267	TG50002	00020201216	6/10/2021 5:30:20 PM	✓		SAIG
<input type="checkbox"/>	In	ISRF21OP	ISIR Data - Requested	TGZ1267	TG50002	00020201216	6/10/2021 5:30:20 PM	✓		SAIG
<input type="checkbox"/>	Out	CORR22IN	Corrections	TGZ1267	TG50002		6/10/2021 5:26:06 PM			System
<input type="checkbox"/>	Out	CORR22IN	Corrections	TGZ1267	TG50002		6/10/2021 5:25:10 PM			System
<input type="checkbox"/>	Out	CORR22IN	Corrections	TGZ1267	TG50002		6/10/2021 5:24:07 PM			System

< Prev 1 2 3 4 5 Next > Last >>

The list displays 10 records per page by default. Set the **Records Per Page** option at the top left of the list to change the list pagination. Use the page controls at the bottom of the list to select a page number or scroll forward or backward through the page sequence.

The list displays the following information related to each message in a column format:

Column	Description
Direction	Direction of the message: in (inbound) or out (outbound)

Column	Description
Message Class	Message class code
Description	Message class description
Sender Mailbox	TG number being used to transmit to the SAIG Portal
Receiver Mailbox	TG number being used to process back in the response from the SAIG Portal
Document ID	Document ID for the Common Record
Batch Number	The batch number associated with the message class file is displayed for messages sent from the Mailbox Manager to the SAIG Portal. A predefined batch number for the Department of Education system is displayed for message class files received from the SAIG Portal.
Received Date	Date and time the message class was received from the SAIG Portal
Download	Displays the check mark icon (👍) if the message has been downloaded at least once
System Received Date	Date when a Message Class was processed into the Staff Portal (blank if not processed in Staff Portal)
Sender	Sender who performed the action SAIG, System, or User Account Name
Notes	Displays a note icon (📝) in this column if there is a note attached to this message. Select the icon to view additional information for the message.

Message Search Criteria

Use the Search Criteria to filter the displayed message list and quickly locate the needed message class files. You can mix and match search criteria to create queries that return messages applicable to your needs. After you set the options for your search, select the **Search** button.

The screenshot shows the 'SAIG Message History' search interface. It features a 'Search Criteria' section with several dropdown menus: 'Class Group' set to 'COD', 'Mailbox' set to 'All', 'Message Class' set to 'COMRECIN - EXPORT COMMON RECORD', 'Direction' set to 'All', and 'Start Date' set to '6/23/2019'. There are also fields for 'Sender Type' (SAIG), 'Downloaded' (All), and 'End Date'. A 'Search' button is located to the right of these fields. Below the search criteria, there is a 'Download Checked' button and a status bar indicating 'Total Records: 4 | Records Per Page: 10'.

You can use the following options to set the search criteria:

Option	Usage
Class Group	<p>Use this option to filter the list of displayed messages using the class group:</p> <ul style="list-style-type: none"> • All: Default setting to display all class groups • COD: Display only Common Origination and Disbursement messages • Default Management: Display only cohort default messages • ISIR/FAFSA: Display only incoming and outgoing messages between the Department and your institution, which includes an applicant's FAFSA information, personal identification information, and Estimated Family Contribution (EFC) • NSLDS: Display only National Student Loan Data System messages • Other: Display only other message classes, as specified by the Department • Pell: Display only Pell grant information messages
Message Class	<p>Use this option to filter the list of displayed messages using the message class.</p> <p>The available message classes depend on the selected Class Group. You can simply select the class or begin entering the name to limit the items for selection. The default setting is "All" which displays all message classes.</p>
Direction	<p>Use this option to filter the list of displayed messages using the FTP transfer direction:</p> <ul style="list-style-type: none"> • All: Default setting to display both directions • In: Display only incoming messages • Out: Display only outgoing messages
Mailbox	<p>Use this option to filter the list of displayed messages using the mailbox.</p> <p>The available mailboxes depend on what is configured for your institution.</p> <p>The default setting is "All" which displays all mailboxes.</p>
Sender Type	<p>Use this option to filter the list of displayed messages using the sender type:</p> <ul style="list-style-type: none"> • All: This is the default setting to display all sender types • SAIG: Display only messages from the Department (All SAIG messages are incoming) • System: Display only messages from the system (All system messages are outgoing) • User: Display only messages from a user of the Mailbox Manager (All User messages are outgoing)
Downloaded	<p>Use this option to filter the list of displayed messages using the download status:</p> <ul style="list-style-type: none"> • All: Default setting to display both statuses • Downloaded: Display only downloaded messages • Not Downloaded: Display only messages that are not downloaded

Option	Usage
Start Date - End Date	<p>Use these options to filter the list of displayed messages using a date range of received and/or transmitted files.</p> <p>The system uses a default range of a 30-days, using the current date as the end date, to eliminate bulk messages in the viewing pane. You can expand or narrow this range as needed.</p>

Download Messages

When you locate the messages that you need, you can select and download them. Typically, you use the [Search Criteria](#) to filter the list of displayed messages so that it displays only those messages that you want to browse or download.

In the displayed list, there is a check box next to each message item.

Download Checked		Total Records: 14 Records Per Page: 10									
<input type="checkbox"/>	Direction	Message Class	Description	Sender Mailbox	Receiver Mailbox	Document ID	Received Date	Download System	Received Date	Sender	Notes
<input type="checkbox"/>	Out	CRTESTIN	EXPORT TEST COMMON RECORD	TG53894	TG75891		1/25/2019 7:17:19 AM	✓		SantoshD@campusgmt.com	
<input type="checkbox"/>	In	CRTESTIN	EXPORT TEST COMMON RECORD	TG53894	TG75891		2/15/2019 8:22:49 AM	✓		tchatriwala@campusgmt.com	
<input type="checkbox"/>	Out	COMRECIN	EXPORT COMMON RECORD	TG53894	TG71900		2/21/2019 7:22:00 AM			Unknown	
<input type="checkbox"/>	Out	CRDL19DN	Common Record - Direct Loan program AY 18-19	TG53894	TG71900		3/18/2019 4:21:00 AM			Unknown	

To select and download messages:

1. Select the check box for each message that you want to include. If you want to include all the items in the filtered list, select the box in the title row to select all displayed messages.

<input checked="" type="checkbox"/>	Direction	Message Class
<input checked="" type="checkbox"/>	In	CRTESTOP
<input checked="" type="checkbox"/>	In	CRTESTOP
<input checked="" type="checkbox"/>	Out	CRTESTIN

2. When the messages that you need are selected, select the **Download Checked** button. The system generates a .zip archive file that contains all the messages you marked for download. Your web browser delivers the file to the default download location.

Export Message Records

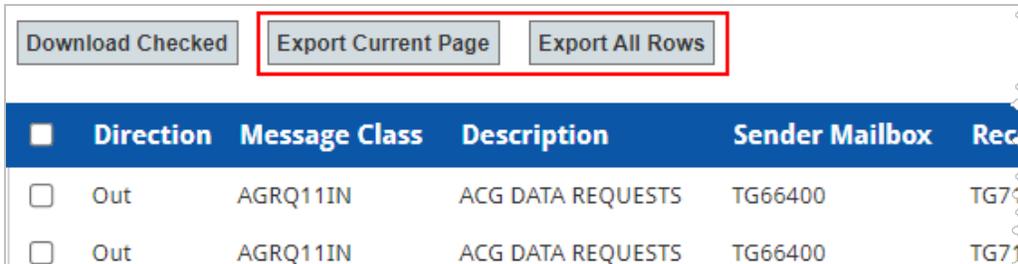
When you access the [SAIG Message History](#) list, you can export the message records to an Excel file. This is useful for producing information for audits and other compliance requests. The Excel worksheet contains the following columns:

- Direction
- MessageClass
- SenderMailbox
- ReceiverMailbox
- DocumentID
- BatchNumber
- ReceivedDate

- SystemReceivedDate
- Sender

To export message records:

1. Select **Messages** in the navigation bar.
2. Select an option at the top of the grid:
 - To export only the records displayed on the current page, select **Export Current Page**.
 - To export all rows on all pages, select **Export All Rows**.



This produces the Excel file and downloads it to your local system where you can save it as needed.

Settings

When you select **Settings** in the [Navigation Bar](#), Mailbox Manager displays the User Administration/Configuration Options page. Administrators can access functions to manage user accounts, roles, TG Accounts, FT accounts, and email subscriptions for Mailbox Manager.

The Settings page also provides the tools to configure import and export schedules and settings for automatic file transfers using FTP or Azure Storage.

anthology

Home Upload Messages **Settings** Contact

Welcome [rick@ep.com](#) | [Log off](#)

User Administration

- [Roles](#)
- [User Accounts](#)
- [Email Subscriptions](#)
- [TG Accounts](#)
- [FT Accounts](#)

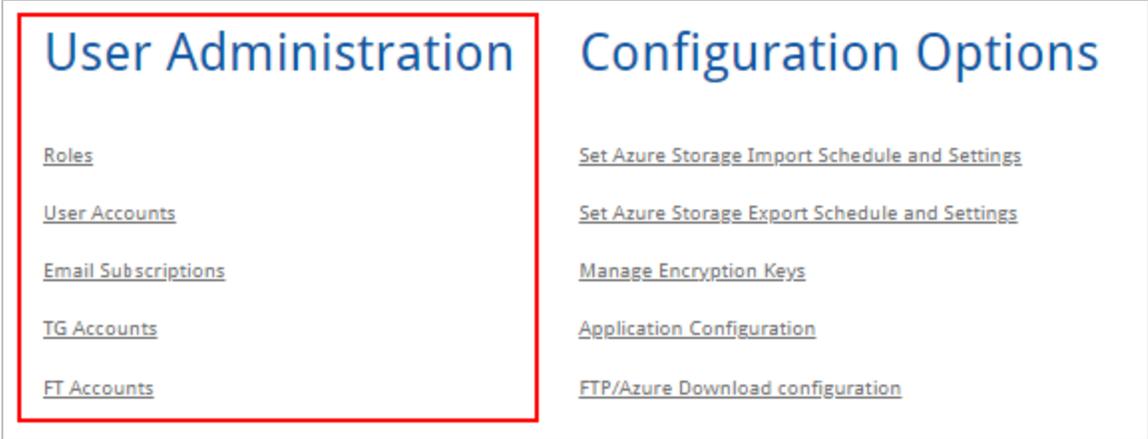
Configuration Options

- [Set Azure Storage Import Schedule and Settings](#)
- [Set Azure Storage Export Schedule and Settings](#)
- [Manage Encryption Keys](#)
- [Application Configuration](#)
- [FTP/Azure Download configuration](#)

User Administration

Users are those people within your organization who log into Mailbox Manager and use its functions. A user's permissions (what actions they can take, and what functional tools and records that they may see or use) are based on the rights granted through assigned [Roles](#).

Administrators can also manage [Email Subscriptions](#) for user accounts so that users receive automated notifications based on Mailbox Manager events. These functions are available when you select **Settings** in the navigation bar.



The screenshot displays two main sections: 'User Administration' and 'Configuration Options'. The 'User Administration' section is highlighted with a red border and includes links for Roles, User Accounts, Email Subscriptions, TG Accounts, and FT Accounts. The 'Configuration Options' section includes links for Set Azure Storage Import Schedule and Settings, Set Azure Storage Export Schedule and Settings, Manage Encryption Keys, Application Configuration, and FTP/Azure Download configuration.

User Administration	Configuration Options
Roles	Set Azure Storage Import Schedule and Settings
User Accounts	Set Azure Storage Export Schedule and Settings
Email Subscriptions	Manage Encryption Keys
TG Accounts	Application Configuration
FT Accounts	FTP/Azure Download configuration

Roles

Administrative users with the required permissions can define a set of user roles and associate the appropriate permissions with each role. These roles are available for association with an individual user account and provide the means to enable the needed functionality for that user.

Managing roles for Mailbox Manager requires the following permissions:

- Can Access/View the Settings Tab
- Can Add/Edit or Delete a Role
- Can Access/View roles

To access the role management functions, select **Settings** in the navigation bar and select **Roles**.

The Roles page displays a list of the defined roles and functions to add, edit, or delete a role.

Name	Description	Last Modified By	Last Modified Date	Is Admin	Actions
Administrator	This role has complete access to all functions in the system.	iec07@yopmail.com	4/8/2021	✔	
<mms...	test test...	NewUser001@test.com	12/29/2020	✔	
.../Test role 2	test test...	NewUser001@test.com	12/29/2020	✔	
...	2/25/2021		
...	3/18/2021		
ISIR Processor	This role completes daily actions related to student ISIR records.	Security001@test.com	2/23/2021		
Fiscal Operations	This role has complete access to all functions in the system.		2/19/2016		
Director/Supervisor	This role completes supervisory actions designated by Administrator.		2/19/2016		
Default Management	This role completes actions related to enrollment reporting and...		2/19/2016		
COD Specialist	This role completes COD origination and disbursement actions.	nishidaa@yopmail.com	11/26/2020		

Mailbox Manager provides a set of default role definitions that are suggestions for the most typical roles within a financial aid department at an institution. You can modify or remove any of the default roles and add your own custom roles to meet the needs of your organization.

Role	Role Description
Administrator	This role has complete access to all functions in the system.
Auditor	This role conducts auditory review of the SAIG messages on a quarterly basis.
COD Specialist	This role completes COD origination and disbursement actions.
Default Management	This role completes actions related to enrollment reporting and default reporting.

Role	Role Description
Director/Supervisor	This role completes supervisory actions designated by Administrator.
Fiscal Operations	This role completes actions related to fiscal operations and funding reconciliation.
ISIR Processor	This role completes daily actions related to student ISIR records.

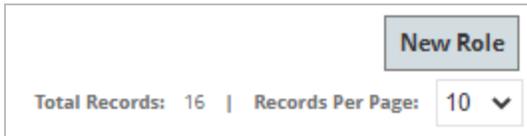
Add a Role

Your organization should determine the required functional roles for users of Mailbox Manager.

As an administrator, you can then add these to the [Roles](#) list so that they can be used to assign permissions to [User Accounts](#). If there is an existing role that you want to re-define to meet your needs, you can choose to [Edit a Role](#) instead of adding a new one.

To add a new role:

1. Select the **New Role** button at the top-right of the list.



2. In the Add New Role page, enter a meaningful **Name** and **Description** for the new role. The name for a role must be unique.

As a best practice, use a name and description that will help ensure that administrators use the role successfully when assigning it to a user account.
3. Select the **Permissions** to be granted to the role.

Add New Role

Name Is Admin ?

Description

Permissions

<input type="checkbox"/> Can Access/View The Upload Tab	<input type="checkbox"/> Can Access/View Email Subscription
<input type="checkbox"/> Can Access/View The Messages Tab	<input type="checkbox"/> Can Edit Email Subscription
<input type="checkbox"/> Can Access/View The Settings Tab	<input type="checkbox"/> Allow user to View the list of TG accounts
<input type="checkbox"/> Can Perform Upload Function	<input type="checkbox"/> Allow user to Add/Edit TG accounts
<input type="checkbox"/> Can Download Message Class File	<input type="checkbox"/> Can Access/View Set Azure Storage Import Schedule and Settings
<input type="checkbox"/> Can Search For Message History	<input type="checkbox"/> Can Access/View Set Azure Storage Export Schedule and Settings
<input type="checkbox"/> Can Add/Edit A User Profile	<input type="checkbox"/> Can Access/View Encryption Keys
<input type="checkbox"/> Can Add/Edit Or Delete A Role	<input type="checkbox"/> Can Manage Encryption Keys
<input type="checkbox"/> Can Enable File Transfer For Outgoing Files	<input type="checkbox"/> Can Access/View Application Configuration
<input type="checkbox"/> Can Enable File Transfer For Incoming Files	<input type="checkbox"/> Can Manage Application Configuration
<input type="checkbox"/> Can Edit/Delete Outgoing File Transfer Fields	<input type="checkbox"/> Can Access/View FTP/Azure Download configuration
<input type="checkbox"/> Can Edit/Delete Incoming File Transfer Fields	<input type="checkbox"/> Can manage FTP/Azure Download configuration
<input type="checkbox"/> Can Submit Support Desk Ticket	<input checked="" type="checkbox"/> Allow user to View the list of FT accounts
<input type="checkbox"/> Can Access/View User Profiles	<input checked="" type="checkbox"/> Allow user to Add/Edit FT accounts
<input type="checkbox"/> Can Access/View Roles	

The role must have a minimum of one selected permission. For more information about the rights associated with each permission, see [Role Permissions](#).

Important: Select the **Is Admin** check box only for the system administrator role. For non-administrator roles, do not select the Is Admin check box. The Is Admin role has complete access to all functions in the system. This should be used for only one role. Non-administrators users cannot edit or delete the administrator role or assign users.

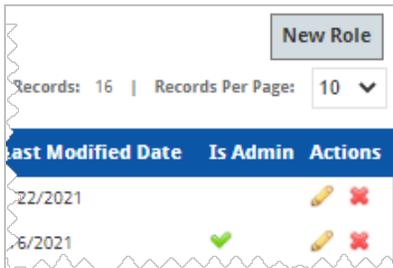
4. Select **Save** to add the new role.

Edit a Role

There will be times when your organization redefines its functions and processes, making it necessary to modify the roles that you have defined in Mailbox Manager. As an administrator, you can modify a role in the Roles list so that it provides the correct permissions for the associated user accounts.

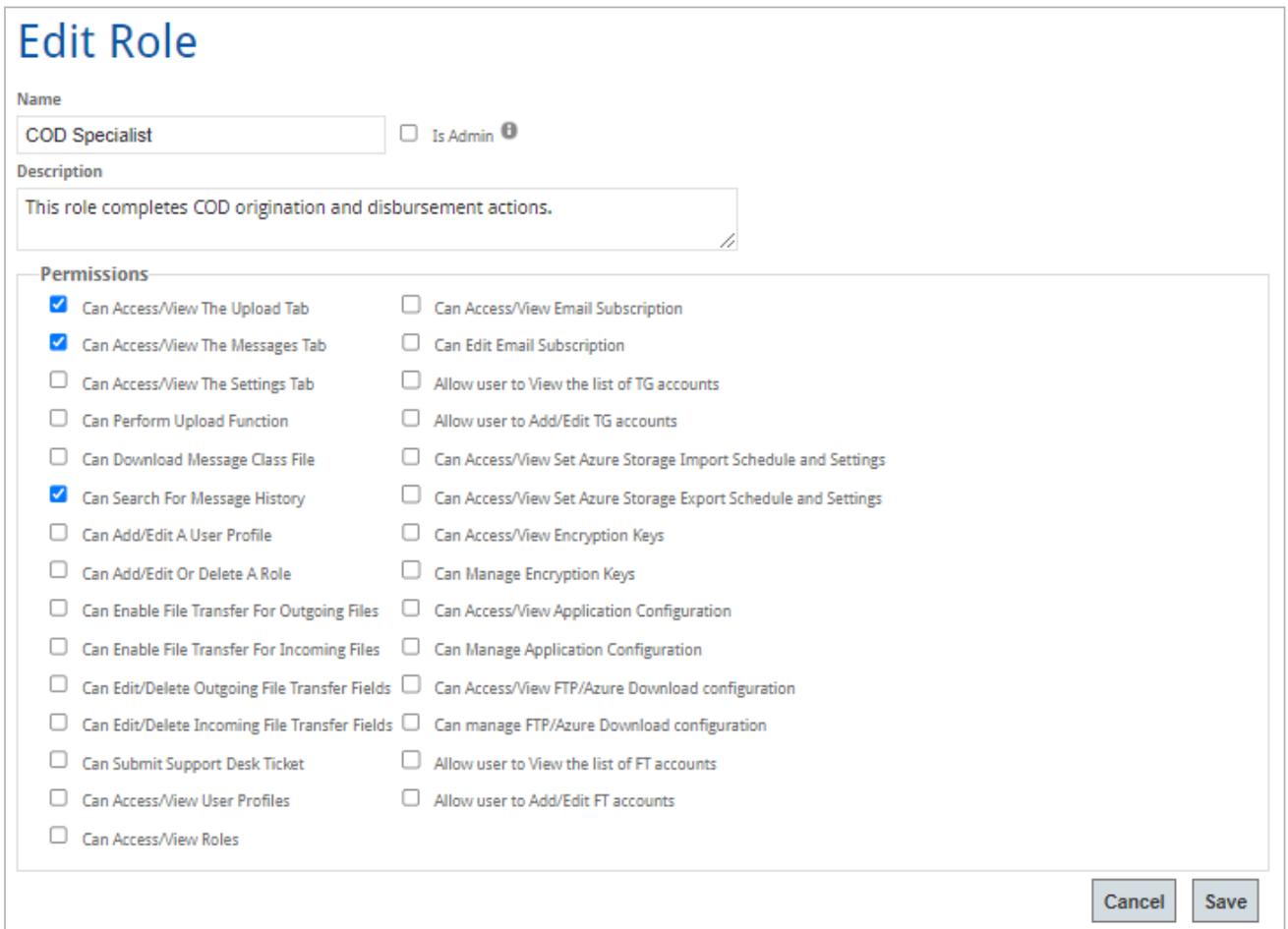
To edit a role:

1. Select the  icon in the Actions column for the role to be modified.



New Role		
Records: 16		Records Per Page: 10
Last Modified Date	Is Admin	Actions
22/2021		 
6/2021		 

2. In the Edit Role page, change the **Name** and **Description** as needed to reflect the purpose of the role.
The name for a role must be unique. As a best practice, use a name and description that will help ensure that administrators use the role successfully when assigning it to a user account.
3. Clear or select the **Permissions** according the current requirements for the role.



Edit Role

Name: Is Admin ⓘ

Description:

Permissions

<input checked="" type="checkbox"/> Can Access/View The Upload Tab	<input type="checkbox"/> Can Access/View Email Subscription
<input checked="" type="checkbox"/> Can Access/View The Messages Tab	<input type="checkbox"/> Can Edit Email Subscription
<input type="checkbox"/> Can Access/View The Settings Tab	<input type="checkbox"/> Allow user to View the list of TG accounts
<input type="checkbox"/> Can Perform Upload Function	<input type="checkbox"/> Allow user to Add/Edit TG accounts
<input type="checkbox"/> Can Download Message Class File	<input type="checkbox"/> Can Access/View Set Azure Storage Import Schedule and Settings
<input checked="" type="checkbox"/> Can Search For Message History	<input type="checkbox"/> Can Access/View Set Azure Storage Export Schedule and Settings
<input type="checkbox"/> Can Add/Edit A User Profile	<input type="checkbox"/> Can Access/View Encryption Keys
<input type="checkbox"/> Can Add/Edit Or Delete A Role	<input type="checkbox"/> Can Manage Encryption Keys
<input type="checkbox"/> Can Enable File Transfer For Outgoing Files	<input type="checkbox"/> Can Access/View Application Configuration
<input type="checkbox"/> Can Enable File Transfer For Incoming Files	<input type="checkbox"/> Can Manage Application Configuration
<input type="checkbox"/> Can Edit/Delete Outgoing File Transfer Fields	<input type="checkbox"/> Can Access/View FTP/Azure Download configuration
<input type="checkbox"/> Can Edit/Delete Incoming File Transfer Fields	<input type="checkbox"/> Can manage FTP/Azure Download configuration
<input type="checkbox"/> Can Submit Support Desk Ticket	<input type="checkbox"/> Allow user to View the list of FT accounts
<input type="checkbox"/> Can Access/View User Profiles	<input type="checkbox"/> Allow user to Add/Edit FT accounts
<input type="checkbox"/> Can Access/View Roles	

The role must have a minimum of one selected permission. For more information about the rights associated with each permission, see [Role Permissions](#).

Important: Select the **Is Admin** check box only for the system administrator role. For non-administrator roles, do not select the Is Admin check box. The Is Admin role has complete access to all functions in the system. This should be used for only one role. Non-administrators users cannot edit or delete the administrator role or assign users.

4. Select **Save** to keep the changes.

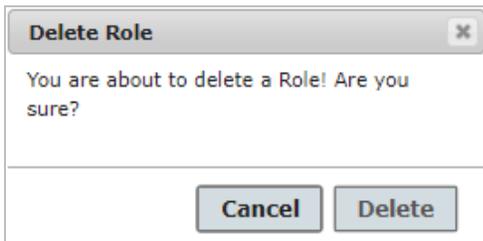
Remove a Role

If you have a role that you do not want to use in the Mailbox Manager, you can remove it from the Roles list. For example, you might determine that one or more of the predefined roles do not fit the needs of your organization and should be removed from the list. However, you can always modify an existing role to meet your needs (including the name) instead of removing it.

Important: You cannot remove a role that is currently associated with one or more user accounts. Modify each user account to use a different role before you proceed to remove it.

To remove a role:

1. Select the  icon in the Actions column for the role to be removed.
2. In the dialog, select **Delete** to confirm removal of the role from the list.



Role Permissions

When you add or edit a role, you select the permissions that are associated with that role. As a best practice, you should grant only those permissions that are needed to fulfill a given role within your organization.

Important: As you select permissions to enable functionality for a role, make sure that you also select the application area (Tab) that is needed to access the function. For example, when you enable the ability to search the message history, you should also enable the access/view permissions for the Messages tab.

Permission name	Users with this permission	Users without this permission
Can Access/View the Upload Tab	View the Upload page	Upload link in menu header is disabled
Can Access/View the Messages Tab	View the Messages page	Messages link in the menu header is disabled

Permission name	Users with this permission	Users without this permission
Can Access/View the Settings Tab	View the Settings page	Settings link in menu header is disabled
Can Access/View Set FTP Import Schedule and Settings	View and Set FTP Import Schedule and Settings page	Set FTP Import Schedule and Settings link is disabled on the Settings page
Can Access/View Set FTP Export Schedule and Settings	View and Set FTP Export Schedule and Settings page	Set FTP Export Schedule and Settings link is disabled on the Settings page
Can Perform Upload Function	Upload message files	Upload button is disabled on the Upload page
Can Download Message Class File	Download message files on the Messages page	Download Checked button is disabled on the Messages page
Can Search For Message History	Search messages on the Messages page	Search button is disabled on the Messages page
Can Add/Edit a User Profile	View User Profile Add/Edit page	New Account button is disabled, Actions column is hidden on the User Accounts page
Can Add/Edit or Delete a Role	View Add/Edit Roles page	New Role button is disabled, Actions column is hidden on the Roles page
Can Enable File Transfer for Outgoing Files	Enabled check box option is editable on the Set a Schedule for Outgoing File Transfers page	Enabled check box option is disabled on the Set A Schedule for Outgoing File Transfers page
Can Enable File Transfer for Incoming Files	Change the value of the Enabled check box on the Set A Schedule for Incoming File Transfers page	Enabled check box option is disabled on the Set A Schedule for Incoming File Transfers page
Can Edit/Delete Outgoing File Transfer Fields	Add new or edit existing outgoing schedule	All fields and buttons are disabled on the Set A Schedule for Outgoing File Transfers page
Can Edit/Delete Incoming File Transfer Fields	Add new or edit existing incoming schedule	All fields and buttons are disabled on the Set A Schedule for Incoming File Transfers page
Can Submit Support Desk Ticket	The Need an FTP or FTPS server? link is visible and active on the Set A Schedule for Incoming File Transfers page	The Need an FTP or FTPS server? link is hidden
Can Access/View User Profiles	View User Accounts page	User Accounts link is disabled on the Settings page

Permission name	Users with this permission	Users without this permission
Can Access/View Roles	View Roles page	Roles link is disabled on the Settings page
Can Access/View Email Subscription	View Email Subscriptions	Email Subscriptions link is disabled on the Settings page
Permission name	Users with this permission	Users without this permission
Can Edit Email Subscription	Can edit Email Subscriptions	Edit icons do not appear on the Email Subscriptions Page
Allow user to View the list of TG accounts	View list of TG Accounts	TG Accounts link is disabled on the Settings Page
Allow user to Add/Edit TG accounts	Create new TG accounts or edit existing ones	New TG Account button is disabled and edit icons do not appear on the TG Accounts Page
Can Access/View Set Azure Storage Import Schedule and Settings	Can access, view, and set Azure Storage import schedules and settings	Set Azure Storage Import Schedule and Settings link is disabled on the Settings Page
Can Access/View Set Azure Storage Export Schedule and Settings	Can access, view, and set Azure Storage export schedules and settings	Set Azure Storage Export Schedule and Settings link is disabled on the Settings Page
Can Access/View Encryption Keys	Can access and view Manage Encryption Keys	Manage Encryption Keys is disabled on the Settings page
Can Manage Encryption Keys	Can access, view, and manage encryption key pairs	Manage Encryption Keys is disabled on the Settings page
Can Access/View Application Configuration	Can access and view the Application Configuration page	Application Configuration is disabled on the Setting page
Can Manage Application Configuration	Can access, view, and manage the Application Configurations	Application Configuration is disabled on the Settings page
Can Access/View FTP/Azure Download configuration	Can access and view the FTP/Azure Download configuration	FTP/Azure Download configuration is disabled on the Settings page
Can Manage FTP/Azure Download configuration	Can manage the FTP/Azure Download configuration	FTP/Azure Download configuration is disabled on the Settings page
Allow user to View the list of FT accounts	Can view the list of FT accounts	Cannot view the list of FT accounts
Allow user to Add/Edit FT accounts	Can add/edit FT accounts	Cannot add/edit FT accounts

User Accounts

Administrative users with the required permissions can manage user accounts in Mailbox Manager, including password maintenance and assigning roles. [Roles](#) provide the means to enable the needed functionality for a user.

Managing user accounts for Mailbox Manager requires the following permissions:

- Can Access/View the Settings Tab
- Can Add/Edit a User Profile
- Can Access/View User Profiles
- Can Access/View Roles

To access the user account management functions, select **Settings** in the navigation bar and select **User Accounts** on the page. The User Accounts page displays a list of the users defined in the system and provides functions to add, search, edit, or delete a user account, and export user account information. You can search the accounts list using a full or partial user name.

Name	Username	Role	Is Active	Last Modified By	Last Modified Date	Actions
user_john	john	testRoleNonAdmin	✗	testRoleNonAdmin	11/10/2022 6:49:43 AM	
testRoleNonAdmin	testRoleNonAdmin	testRoleNonAdmin	✗	testRoleNonAdmin	6/24/2022 1:34:40 PM	
testRoleNonAdmin	testRoleNonAdmin	testRoleNonAdmin	✗	testRoleNonAdmin	10/25/2022 1:07:44 PM	
testRoleNonAdmin	testRoleNonAdmin	Administrator	✓	testRoleNonAdmin	10/25/2022 3:32:15 PM	
testRoleNonAdmin	testRoleNonAdmin	testRoleNonAdmin	✗	testRoleNonAdmin	9/16/2021 1:34:43 PM	
testRoleNonAdmin	testRoleNonAdmin	Administrator	✓	testRoleNonAdmin	11/12/2021 12:27:05 PM	
testRoleNonAdmin	testRoleNonAdmin	burp test	✓	testRoleNonAdmin	11/18/2021 8:06:09 AM	
testRoleNonAdmin	testRoleNonAdmin	Administrator	✓	testRoleNonAdmin	10/25/2022 12:40:53 PM	
testRoleNonAdmin	testRoleNonAdmin	Director/Supervisor	✓	testRoleNonAdmin	9/17/2021 1:58:04 AM	
testRoleNonAdmin	testRoleNonAdmin	Administrator	✓	testRoleNonAdmin	11/30/2022 11:03:03 PM	

Add User Account

As an administrator, you can add a new user to Mailbox Manager to provide access to an individual within your organization.

If the account is enabled upon creation, the new user receives an email notification stating that a new account is created on their behalf. At that time, the new user must navigate to Mailbox Manager and select the [Forgot Password](#) link. Upon successful login, the new user can select the username located at the top of the Home page to make edits to [My Profile](#).

To add a new user account:

1. Select **Settings** in the navigation bar and select **User Accounts**.
2. Select the **New Account** button at the top-right of the list.



3. On the Create New Account page, define the initial **User Profile** and **User Settings**.

The 'Create New Account' form is divided into two main sections: 'User Profile' and 'User Settings'.
User Profile: Includes an 'Enabled' checkbox with an information icon, and text input fields for 'First Name', 'Middle Name', 'Last Name', 'Username', and 'Notification Email Address'.
User Settings: Includes a 'Role' dropdown menu (currently showing 'Select Role'), an 'Assigned Mailbox Selection(s)' dropdown menu (currently showing 'Select options'), and 'File Naming Convention' options: 'Serial Number Extension (.dat file)' (selected) and 'Standard Format (.txt file)'.

Field	Description
Enabled	Select this check box to immediately enable the user account upon creation.

Field	Description
First Name, Middle Name, Last Name	Enter the name information for the associated user. The middle name is not required. Users can update this information later if they update their profiles.
Username	Enter the login name for the user. This could be the same as the user's notification email address or a simple login name. This name must be unique within the system.
Notification Email Address	Enter the email address that is used by the system for authentication and user notifications (configured in Email Subscriptions).
Role	Select the defined role (with associated permissions) that aligns with the user responsibilities.
Assigned Mailbox Selection(s)	You can create a user with or without selecting an assigned mailbox (TG number). If you want to assign a mailbox, select one or more values in the Assigned Mailbox Selection(s) field. Select Check all to select all mailboxes in the list or Uncheck all to clear all selections. The text in the combo box provides you with the number of accessible mailboxes for the user. Important: The user must have access to at least one mailbox to view messages on the Message History page.
File Naming Convention	Choose the file naming convention for the user account. Serial Number Extension orders and names messages by message class, with the first message within a message class having the extension .DAT. Standard Format uses a simple Message Class + Year-MonthDay-Hours-Minutes + Message ID + File Extension construction.

4. Select **Save** to add the new user account.

When you create a user account, Mailbox Manager generates and sends an email to the new user. The following is an example of the email:

Action	Content
User Account Deactivation	<p>Dear <User First Name>,</p> <p>A new user account has been created in our online Mailbox Manager application on your behalf by <Institution Name/Campus Name>.</p> <p>Please select the Mailbox Manager link provided below to set your password. <Set Password></p> <p>Navigate to the Login page on the Mailbox Manager site after successful completion of the password reset. Be sure to select the your username in the top right-hand corner of the page to confirm additional account details upon initial login to the application.</p> <p>Please see the Mailbox Manager link and your username below for future use and reference.</p> <p>User Account Information: Mailbox Manager: https://<subdomain name> Username: <username field></p> <p>Please contact your security administrator should you have any additional questions accessing your account.</p> <p>Sincerely, Mailbox Manager Support Team</p> <p>Do not reply to this message - the address it was sent from is not monitored</p>

Edit User Account

As an administrator, you can modify an existing user account as needed. This includes a change to the assigned role or updating the password. You can also enable or disable a user account. Users can also make certain changes to their own account using the My Profile page, such as password updates and their notification email address.

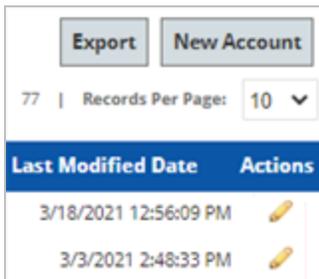
Important: Users cannot change their assigned role or assigned mailboxes.

When you disable a user account or update the password as an administrator, Mailbox Manager generates and sends an email to the affected user. Depending on the action, it sends the following email messages:

Action	Content
User Account Deactivation	<p>Subject: Account Deactivation Notice</p> <p>Body: Dear [[FirstName]],</p> <p>Our records indicate your account, [[Username]] has been deactivated and is no longer available for use as of [[DateTimeNow]].</p> <p>If you have received this email in error, please contact your system administrator for additional details.</p> <p>This email was auto generated by the Education Partners at [[DateTimeNow]] Do not reply to this message - the address it was sent from is not monitored</p>
Recovery Password	<p>Subject: Requested Password Reset</p> <p>Body: You recently requested to reset your password for the Mailbox Manager Portal.</p> <p>To reset your password, please click here to set your password and log into the Mailbox Manager Portal.</p> <p>This link will only be valid for 30 minutes.</p> <p>If you did not request a password reset, please contact your internal Education Partners administrator.</p> <p>Thank you,</p> <p>This email was auto generated by the Education Partners at [[DateTimeNow]]</p> <p>Do not reply to this message - the address it was sent from is not monitored</p>

To edit a user account:

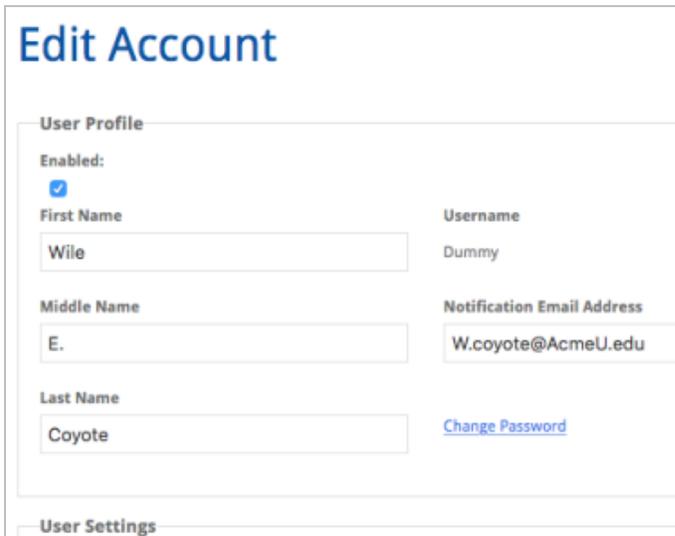
1. Select **Settings** in the navigation bar and select **User Accounts** on the page.
2. Select the edit icon () in the Actions column for the account to be modified.



3. On the Edit User Account page, update the parameters as needed for the User Profile.

If the user account should no longer be available for use, clear the **Enable** check box to disable the account.

For more information about the User Profile parameters, see [Add User Account](#). You cannot change the Username for the account.



The screenshot shows the 'Edit Account' form. The 'User Profile' section is expanded and contains the following fields:

- Enabled:** A checked checkbox.
- First Name:** Text input field containing 'Wile'.
- Middle Name:** Text input field containing 'E.'.
- Last Name:** Text input field containing 'Coyote'.
- Username:** Text input field containing 'Dummy'.
- Notification Email Address:** Text input field containing 'W.coyote@AcmeU.edu'.
- Change Password:** A blue link.

Below the 'User Profile' section is a partially visible 'User Settings' section.

4. If you need to update the password for the user account, select **Change Password**.

In the dialog, enter the new password and confirm it.



The screenshot shows a 'Change Password' dialog box with the following elements:

- Change Password** (title bar)
- Password** (label) with an information icon and a text input field.
- Confirm Password** (label) with a text input field.
- Cancel** (button)
- Change Password** (button)

Important: Passwords must be at least eight characters and must contain at least one uppercase letter, lowercase letter, number (0-9), and a special character.

5. Select the **Change Password** button to complete the password update.
6. Update the **User Settings** for the account as needed.

For details about the User Settings, see [Add User Account](#).

7. Select **Save** to save your changes to the new user account.

When you assign a TG Account, Mailbox Manager generates and sends email communication to affected users notifying them that a TG account assignment has been made.

The following is an example of the email communication:

Email Subject	Email Body/Content
New User Account Creation	<p>Dear User,</p> <p>A new user account has been created in our online Mailbox Manager application on your behalf by the <School Name>.</p> <p>Please select the Mailbox Manager link provided below to set your password.</p> <p><u>Set Password</u></p> <p>Navigate to the Login page on the Mailbox Manager site after the successful completion of the password reset. Be sure to select your username in the top right-hand corner of the page to confirm additional account details upon initial login to the application.</p> <p>Please see the Mailbox Manager link and your username below for future use and reference.</p> <p>User Account Information:</p> <p>Mailbox Manager: https://mailbox.educationpartners.com</p> <p>Username: User Test</p> <p>Please contact your security administrator should you have any additional questions accessing your account.</p> <p>Sincerely,</p> <p>Mailbox Manager Support Team</p>

Export User Account Information

When you access the list of [User Accounts](#), you can export the displayed information to an Excel file. This is useful for producing information for audits and other compliance requests. The Excel worksheet contains the following columns of user account information:

- Full Name
- Username
- Role
- Is Active
- Last Modified Username
- Last Modified Date

To export the user account information:

1. Select **Settings** in the navigation bar and select **User Accounts**.
2. Select the **Export** button at the top-right of the list.



This produces the Excel file and downloads it to your local system where you can save it as needed.

Email Subscriptions

As an administrator you can configure email subscriptions to send automated communications to selected user accounts to alert them about events within Mailbox Manager. The system uses the notification email address defined for the user account to send subscribed email communications.

The following permissions are required manage email subscriptions:

- Can Access/View the Setting Tab
- Can Access/View Email Subscriptions
- Can Edit Email Subscriptions

To access the email subscription configuration, select **Settings** in the navigation bar and select **Email Subscriptions**.

The Email Subscriptions page lists the available notification types for subscribed Mailbox Manager communications. For each type, you can select the user accounts that receive the generated notifications.

Type	Description	View
New File(s) Upload	Sent when a user uploads a new file(s) on the Upload tab.	
New File(s) Available	Sent when new message class files are available in the File Transfer Processing (FTP) directory	
Monthly Activity Summary	Sent monthly to show message and user activity	
FTP Validation Failure	Sent when an error occurs on the File Transferring Processing configuration	
FTP Transmission Summary	Sent when message class files are transmitted via the File Transfer Processing (FTP) option.	
Azure Storage Validation Failure	Sent when an error occurs on the File Transferring Processing configuration	
Azure Storage Transmission Summary	Sent when message class files are transmitted via the File Transfer Processing (Azure Storage) option.	

Type	Description	Subject
New File Upload	Sent when a user uploads a new file(s) from the Upload tab.	New File Transmission Notification
New File Available	Sent when new message class files are available in the Messages tab, the File Transfer Protocol (FTP), or the Azure Cloud Storage directory.	New File Available Notification
Monthly Activity Summary	Sent monthly to show message and user activity.	Notification Activity Summary

Type	Description	Subject
FTP Validation Failure	Sent when an error occurs on the File Transfer Protocol configuration.	FTP Outgoing Transmission Failure: Client Name - MM/DD/YYYY UTC FTP Incoming Transmission Failure: Client Name - MM/DD/YYYY UTC
FTP Transmission Summary	Sent when message class files are transmitted via the File Transfer Protocol (FTP) option.	FTP Outgoing Transmission Processed: Client Name - MM/DD/YYYY UTC FTP Incoming Transmission Processed: Client Name - MM/DD/YYYY UTC
Azure Storage Validation Failure	Sent when an error occurs on the File Transferring Processing configuration.	Azure Storage Outgoing Transmission Failure: Client Name - MM/DD/YYYY UTC Azure Storage Incoming Transmission Failure: Client Name - MM/DD/YYYY UTC
Azure Storage Transmission Summary	Sent when message class files are transmitted via the File Transfer Processing (Azure Storage) option.	Azure Storage Outgoing Transmission Processed: Client Name - MM/DD/YYYY UTC Azure Storage Incoming Transmission Processed: Client Name - MM/DD/YYYY UTC

View and Add Subscriptions

You can add or view subscribers for a selected email notification by selecting the  icon in the View column for the notification type. The Email Subscription Details page displays the email type and description and the available users that can subscribe to the notification. Modify the user selections according to your needs and select the **Save** button.

Email Subscription Details

Type: New File(s) Upload

Description: Sent when a user uploads a new file(s) on the Upload tab.

Users

(superadmin@broadleafsolutions.com) Test, Davenport (jacquited@outlook.com)
 (demo@rosseducation.edu) Test, Concorde (test@schools.com)

TG Accounts

As an administrator, you can manage TG accounts in Mailbox Manager.

The following permissions are required manage TG accounts:

- Allow user to View the list of TG accounts
- Allow user to Add/Edit TG accounts

To access the TG Accounts page, select **Settings** on the navigation bar and select **TG Accounts**. The TG Accounts page lists existing TG accounts and details.

TG Accounts

Account Details Export Add TG Account

Search Criteria

TG Number Search

Total Records: 84 | Records Per Page: 10

TG Number	Description	Account Option	Last Password Change	Manual Password Update	Is Active	Actions
TGZ1298	testbfgxfg	General		✘	✘	
TGZ1297	test	General	4/8/2021 12:30:29 PM	✘	✘	
TGZ1296	test	Personal	4/12/2021 8:37:06 AM	✔	✘	
TGZ1267	DO NOT MODIFY THIS TG NUMBER	Personal	12/10/2021 2:54:40 PM	✔	✔	
TGZ1266	valid	Personal	2/16/2021 7:58:07 AM	✘	✘	
TGZ1265	test	Personal	3/18/2021 9:41:34 AM	✔	✘	
TGZ1264	NEWUSER001@test.com	Personal		✔	✘	
TGZ1263	test@test.com	General		✘	✘	
TGZ123Q	test TG	Personal		✔	✘	
TGZ1200	dp	General	12/2/2021 8:00:39 AM	✘	✘	

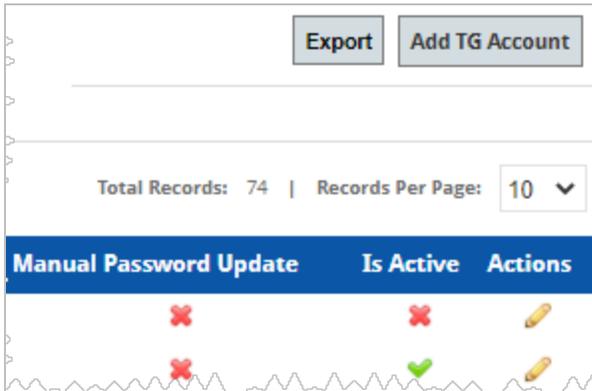
1 2 3 4 5 [Next >](#) [Last >>](#)

Add TG Account

You can add TG accounts and associate the account with users to enable the users to upload message to the SAIG gateway.

To add a TG Account:

1. Select **Add TG Account** on the top right of the TG Accounts page.



2. On the Add TG Account page, select the link to **TD Client Community Manager** and log in using your TG Number and password to ensure your credentials are active and valid. After successful login, return to this page and enter the same TG Number and password used to access TD Client.

Add TG Account

This page is used to manage TG Numbers that are currently active with the Education Department (ED).

As best practice, first login to [TD Client Community Manager](#) using your TG Number and password to ensure your credentials are active and valid. After successful login, return to this page and enter the same TG Number and password used to access TD Client.

For assistance creating or deactivating TG Numbers with ED, visit [SAIG Enrollment Site](#) or call 1-800-330-5947.

General Info

TG Number ⁱ

Password ⁱ

Description

Enabled:

User Associate Settings

Options

Manual Password Update ⁱ

Associated User Accounts

Name	Primary DPA	Secondary DPA	Remove
------	-------------	---------------	--------

Name	Description
TG Number	Enter the TG number. This number should begin with “TG” followed by 5 alphanumeric characters.
Password	Initial setup of the TG account requires the current password associated with the TG Number.
Description	Enter a unique description for the TG account being created.
Enabled	Select this check box to enable the TG account. Please validate the TG account before selecting the Enabled check box. You can clear this option at any point in the future to disable the TG account.

3. Select the **Validate TG Account** button to validate the specified TG Account Information.

If the validation is not successful, select the **TD Client Community Manager** link and try to log in. If there are issues, consult the **SAIG Enrollment Site** or call 1-800-330-5947.

4. Specify the **User Associate Settings** for the account.

User Associate Settings

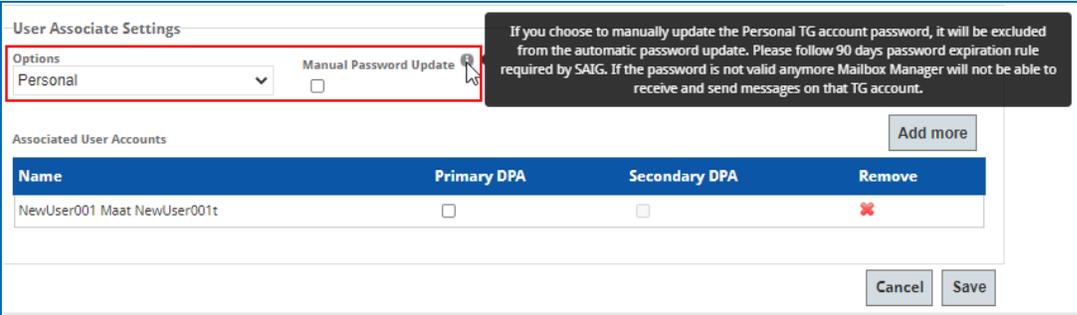
Options: General ▼ Manual Password Update ⁱ

Associated User Accounts Add more

Name	Primary DPA	Secondary DPA	Remove
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✖

Cancel Save

User Associate Settings	Description
Options	Designate the account as a General or Personal TG Mailbox. General accounts may have multiple users assigned. Personal accounts may only have one (1) user account associated with them. The password for General and Personal accounts will change every 7 days.

User Associate Settings	Description
Manual Password Update	<p>The Manual Password Update option is available for General and Personal accounts. Select this option if you want to allow users to manage the password and prevent it from changing every 7 days.</p> <p>If Manual Password Update is selected for a General account, the account will be excluded from the automatic password update, and the 90-day password expiration rule required by SAIG will be followed.</p> 
Associated User Accounts	<p>Select one or more users that can access the TG Mailbox by selecting Add more. Designate a Primary Destination Point Administrator (DPA). A Secondary DPA is optional.</p> <p>Note: You can add a TG account without designating associated user accounts as Primary or Secondary DPA. To enable/validate the TG account, there has to be at least one (1) associated user account marked as Primary DPA.</p>

5. Select **Save** to add the new TG account.

When you assign a TG account, Mailbox Manager generates and sends email communication to affected users notifying them that a TG account assignment has been made.

The following is an example of the email communication:

Email Subject	Email Body/Content
TG Account Assignment Made	<p>Hello {FirstName},</p> <p>TG Account: TGXXXXXX has been assigned to your user profile as of mm/dd/yyyy h:m-m:ss</p> <p>Please click below to review changes made to your user account.</p> <p>Link to the My Profile page</p> <p>Please contact your system administrator for any questions related to changes made on your account.</p> <p>Do not reply to this message - this email address is not monitored for replies.</p>

Edit TG Account

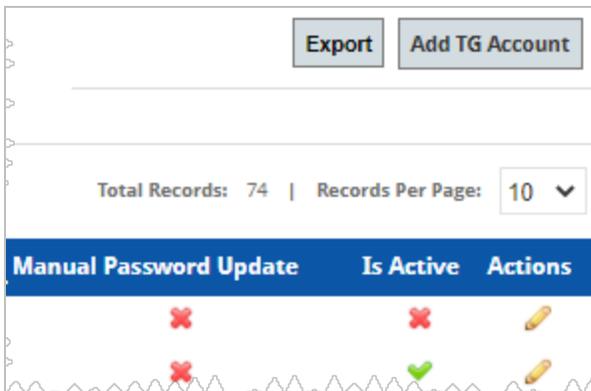
As an administrator, you can modify an existing TG account as needed. This includes a changing the password or User Associate Settings. You can also enable or disable a TG account. Users can also make certain changes to their own account using the My Profile page, such as password updates.

When you remove a user account, Mailbox Manager generates and sends an email communication to the affected users. The following is an example of the email communication:

Email Subject	Email Body/Content
TG Account Removed	<p>Hello {FirstName},</p> <p>TG Account: TGXXXXX has been removed from your user profile as of mm/dd/yyyy h:mm:ss Please click below to review changes made to your user account.</p> <p>Link to the My Profile page</p> <p>Please contact your system administrator for any questions related to changes made on your account.</p> <p>Do not reply to this message - this email address is not monitored for replies.</p>

To edit a TG account:

1. Select **Settings** in the navigation bar and select **TG Account**.
2. Select the edit icon () in the Actions column for the account to be modified.



3. On the Edit TG Account page, select the **Validate TG Account** button to validate the TG Account Information.

If the validation is not successful, select the **TD Client Community Manager** link and try to log in. If there are issues, consult the **SAIG Enrollment Site** or call 1-800-330-5947.

If a password has been created or updated in TD Client Community Manager, select the **Sync Password** link to ensure that the Mailbox Manager and TD Client site credentials match. You can sync passwords even if the TG account is not enabled in Mailbox Manager.

Edit TG Account

This page is used to manage TG Numbers that are currently active with the Education Department (ED).

If you are unable to successfully Validate TG Account, first login to [TD Client Community Manager](#) using your TG Number and password to ensure that your credentials are active and valid. Return to this page and use the Sync Password link to enter the same password used to access TD Client. Then select Validate TG Account.

For assistance managing TG Number passwords with ED, visit [SAIG Enrollment Site](#) or call 1-800-330-5947.

General Info

TG Number : TGZ1297 ¹

Description : test

Enabled:

[Change Password](#)

[Sync Password](#)

Last password change: 4/8/2021 12:30:29 PM

[Validate TG Account](#)

User Associate Settings

Options

General ▼

Associated User Accounts

[Add more](#)

Name	Primary DPA	Secondary DPA	Remove
James Madison	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NewUser001 Maat NewUser001t	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Cancel](#)

[Save](#)

4. Update the **General Info** and **User Associate Settings** as needed.

Note: You can edit a TG account without designating associated user accounts as Primary or Secondary DPA. To enable/validate the TG account, there has to be at least one (1) associated user account marked as Primary DPA.

5. If the TG account should no longer be available for use, clear the **Enabled** check box to disable the account.
6. If you need to update the password for the user account, select **Change Password**.

Passwords must be at least eight characters, start with an alphabetic character, and must contain at least one uppercase letter and one lowercase letter.

Select the **Change Password** button to complete the password update.

7. Personal TG account holders can enable/disable the **Manual Password Update** option for their accounts.

Personal TG accounts can be included in automated weekly password updates. The Manual Password Update configuration option allows account holders to forgo the automated updates and change their password manually every 90 days.

The Manual Password Update column in the TG account grid provides visibility and tracking of those TG numbers with Manual Passwords Updates enabled.

Mailbox Manager sends an email message instructing users to change their TD Client password preceding the anticipated expiration of credentials.

- The email is sent to the Notification Email Address specified in the [user profile](#) of the Primary DPA.
- Notifications are sent for Enabled TG Numbers only.
- The first message is sent 83 days from the last password change or sync.
- The message is sent every day until the user resets or syncs the password.
- The message contains a link to the Edit TG Account page for the respective TG Number (UI login required).
- Users of Personal accounts with manual password update will receive notification when their passwords are about to expire.
- When 90 days have passed, users cannot change their passwords from Mailbox Manager. They need to request a password reset in the SAIG portal and sync the password in Mailbox Manager as stated in the following notification.

Dear {Staff first name},

You have selected manual password update for {TG Number} in the Mailbox Manager application. TD Client requires password changes every 90 days. The TD Client password for this TG account has not been updated in more than 90 days.

Mailbox Manager will not be able to receive and send messages for this TG account with an expired password, nor can the change password functionality be used.

You can request a password reset at <https://saigportal.ed.gov/> or call SAIG Support at 800-330-5947, then [click here](#) to sync your new TD Client password with Mailbox Manager.

Thank you,

Mailbox Manager Support Team

8. Select **Save** to save your changes to the new user account.

When you change a TG account password, Mailbox Manager generates and sends an email communication to the affected users. The following is an example of the email communication:

Email Subject	Email Body/Content
Change of Password Notification	<p>Hello {FirstName},</p> <p>You are receiving this notification because the password associated with a TG account assigned to your user profile has recently changed. Please contact your system administrator for any questions related to changes made to the associated TG account.</p> <p>Thank you,</p> <p>Mailbox Manager Support Team</p>

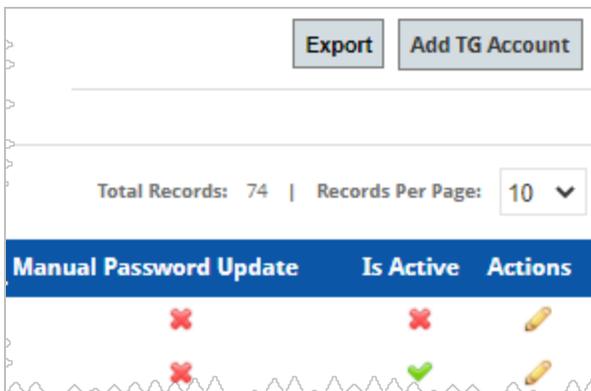
Export TG Account Information

When you access the list of [TG Accounts](#), you can export information to an Excel file. This is useful for producing information for audits and other compliance requests. The Excel worksheet contains the following columns of user account information:

- TG Number
- Description
- Is Active (True or False)
- Option (General or Personal)
- User Account Associates

To export the user account information:

1. Select **Settings** in the navigation bar and select **TG Accounts** on the page.
2. Select the **Export** button at the top-right of the list.



This produces an Excel file and downloads it to your local system where you can save it as needed.

FT Accounts

As an administrator, you can manage FT accounts in Mailbox Manager. The FT accounts are used for transmission of federal tax information (FTI) for the 2024–25 award year and beyond. Updated versions of EDconnect, TDClient, and TDCCommunityManager (TDCM) must be installed to receive 2024–25 ISIR data in an FTI-SAIG mailbox.

The following permissions are required manage FT accounts:

- Allow user to View the list of FT accounts
- Allow user to Add/Edit FT accounts

To access the FT Accounts page, select **Settings** on the navigation bar and select **FT Accounts**. The FT Accounts page lists existing FT accounts and details.

FT Accounts

Account Details Export Add FT Account

Search Criteria

FT Number Search

Total Records: 11 | Records Per Page: 10

FT Number	Description	Account Option	Last Password Change	Manual Password Update	Is Active	Actions
FT56789	NewUser001@test.com	General	2/27/2024 11:31:11 AM	✘	✘	
FT54321	NewUser001@test.com	General	2/27/2024 11:19:34 AM	✘	✘	
FT23132	newuser001@test.com	General	2/21/2024 10:10:21 AM	✘	✘	
FT21211	newuser001@test.com	General	2/21/2024 11:33:20 AM	✘	✘	
FT12345	NewUser001@test.com	General	2/27/2024 10:47:23 AM	✘	✔	
FT00011	newuser001@test.com	General	2/26/2024 11:16:33 AM	✘	✘	
FT00009	newuser003@test.com	General	2/23/2024 2:24:32 PM	✘	✘	
FT00008	newuser001@test.com	General	2/23/2024 2:15:06 PM	✘	✘	
FT00007	newuser001@test.com	General	2/23/2024 9:19:49 AM	✘	✘	
FT00006	newuser0011@test.com	General	2/22/2024 11:02:53 AM	✘	✘	

1 2 [Next >](#)

Add FT Account

You can add FT accounts and associate the account with users to enable the users to upload message to the FTI-SAIG gateway.

To add an FT Account:

1. Select **Add FT Account** on the top right of the FT Accounts page.

- On the Add FT Account page, select the link to **TD Client Community Manager** and log in using your FT Number and password to ensure your credentials are active and valid. After successful login, return to this page and enter the same FT Number and password used to access TD Client.

Add FT Account

This page is used to manage FT Numbers that are currently active with the Education Department (ED).

As best practice, first login to [TD Client Community Manager](#) using your FT Number and password to ensure your credentials are active and valid. After successful login, return to this page and enter the same FT Number and password used to access TD Client.

For assistance creating or deactivating FT Numbers with ED, visit [SAIG Enrollment Site](#) or call 1-800-330-5947.

General Info

FT Number ⁱ

Password ⁱ

Approval Code ⁱ

Description

Choose Runtime File to upload ⁱ No file chosen

Enabled:

User Associate Settings

Options Manual Password Update ⁱ

Associated User Accounts

Name	Primary DPA	Secondary DPA	Remove

Name	Description
FT Number	Enter the FT number. This number start with the letters "FT" followed by 5 alphanumeric characters.

Name	Description
Password	<p>Initial setup of the FT account requires the current password associated with the FT Number. The password must have at least 15 characters, start with alphabetic character and include at least one uppercase letter, one lowercase letter, one numeric and one special character, specifically (!, @, #, \$, &, *).</p> <p>For an account number starting with FT, the Runtime File and Approval Code are additional required fields.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note: The SaigAccounts ValidateAccount function returns the error codes retrieved from SAIG to the Mailbox Manager application. The following messages are displayed for error codes 530, 531, 535, 536, 537, and 540:</p> <p>530 <i>Login incorrect, please confirm that the TG/FT number you are using to transmit is the correct FT/TG number. If the TG number is correct, your FT/TG password is incorrect.</i></p> <p>531 <i>Your SAIG network password has expired. Please change your FT/TG password through Change Password link on the Edit FT/TG account screen.</i></p> <p>535 <i>You are attempting to reuse a previously used password. Your network password cannot be the same as any of the five network passwords you have used most recently.</i></p> <p>536 <i>Your FT/TG password does not meet the minimum criteria.</i></p> <p>537 <i>You have exceeded the maximum number of attempts to log in and your account has been locked. After 15 minutes, the lock will expire, and you can try again.</i></p> <p>540 <i>Either the FT/TG number or existing FT/TG password you provided was incorrect.</i></p> </div>
Approval Code	Enter the 16-character approval code from the FTI-TDCM Participant Tab.
Description	Enter a unique description for the FT account being created.
Choose Runtime File to upload	Select the Choose File button and select the file to upload. Download the RUNTIME file from the FTI-TDCM Participant Tab.
Enabled	The account can be enabled if validation succeeds. If the account can't be enabled (unsuccessful validation), it can be edited later on the Edit FT Account screen.

4. Select **Validate FT Account** to test the FT account credentials (FT Number and password).

If the validation is not successful, select the **TD Client Community Manager** link and try to log in. If there are issues, consult the **SAIG Enrollment Site** or call 1-800-330-5947.

5. Specify the **User Associate Settings** for the account.

User Associate Settings

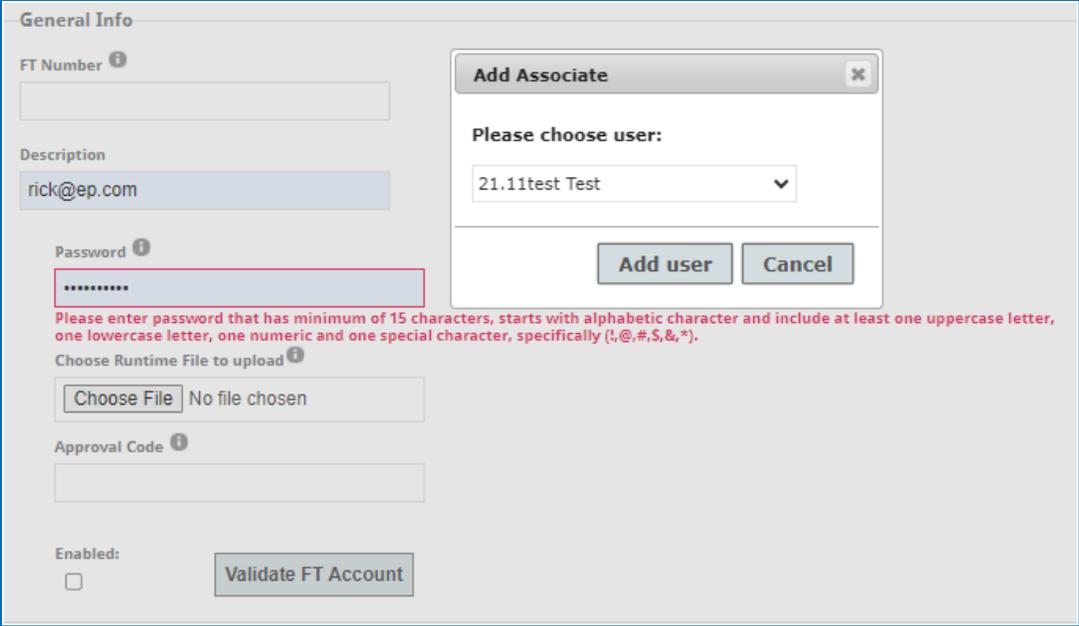
Options: General Manual Password Update ⁱ

Associated User Accounts Add more

Name	Primary DPA	Secondary DPA	Remove
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="✘"/>

Cancel Save

User Associate Settings	Description								
Options	<p>Designate the account as a General or Personal FT Mailbox.</p> <p>General accounts may have multiple users assigned.</p> <p>Personal accounts may only have one (1) user account associated with them.</p> <p>The password for General and Personal accounts will change every 7 days.</p>								
Manual Password Update	<p>The Manual Password Update option is available for General and Personal accounts. Select this option if you want to allow users to manage the password and prevent it from changing every 7 days.</p> <p>If Manual Password Update is selected for a General account, the account will be excluded from the automatic password update, and the 90-day password expiration rule required by SAIG will be followed.</p> <div data-bbox="414 1197 1502 1522" data-label="Complex-Block"> <p>-User Associate Settings</p> <p>Options: Personal Manual Password Update ⁱ <input type="checkbox"/></p> <p>Associated User Accounts Add more</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Primary DPA</th> <th>Secondary DPA</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td>NewUser001 Maat NewUser001t</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="button" value="✘"/></td> </tr> </tbody> </table> <p>Cancel Save</p> <p><small>If you choose to manually update the Personal TG account password, it will be excluded from the automatic password update. Please follow 90 days password expiration rule required by SAIG. If the password is not valid anymore Mailbox Manager will not be able to receive and send messages on that TG account.</small></p> </div>	Name	Primary DPA	Secondary DPA	Remove	NewUser001 Maat NewUser001t	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="✘"/>
Name	Primary DPA	Secondary DPA	Remove						
NewUser001 Maat NewUser001t	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="✘"/>						

User Associate Settings	Description
Associated User Accounts	<p>Select Add more to designate additional users that can access the FT Mailbox.</p>  <p>In the Add Associate pop-up, choose a user in the drop-down list and select the Add user button.</p> <p>Designate a Primary Destination Point Administrator (DPA). A Secondary DPA is optional.</p> <p>Note: You can add an FT account without designating associated user accounts as Primary or Secondary DPA. To enable/validate the FT account, there has to be at least one (1) associated user account marked as Primary DPA.</p>
Validate FT Account	<p>Select Validate FT Account to test the FT account credentials (FT Number and password).</p>

6. Select **Save** to add the new FT account.

When you assign an FT account, Mailbox Manager generates and sends email communication to affected users notifying them that an FT account assignment has been made.

The following is an example of the email communication:

Email Subject	Email Body/Content
FT Account Assignment Made	<p>Hello {FirstName},</p> <p>FT Account: FTXXXXX has been assigned to your user profile as of mm/dd/yyyy h:m-m:ss</p> <p>Please click below to review changes made to your user account.</p> <p>Link to the My Profile page</p> <p>Please contact your system administrator for any questions related to changes made on your account.</p> <p>Do not reply to this message - this email address is not monitored for replies.</p>

Edit FT Account

As an administrator, you can modify an existing FT account as needed. This includes a changing the password or User Associate Settings. You can also enable or disable an FT account. Users can also make certain changes to their own account using the My Profile page, such as password updates.

When you remove a user account, Mailbox Manager generates and sends an email communication to the affected users. The following is an example of the email communication:

Email Subject	Email Body/Content
FT Account Removed	<p>Hello {FirstName},</p> <p>FT Account: FTXXXXX has been removed from your user profile as of mm/dd/yyyy h:mm:ss</p> <p>Please click below to review changes made to your user account.</p> <p>Link to the My Profile page</p> <p>Please contact your system administrator for any questions related to changes made on your account.</p> <p>Do not reply to this message - this email address is not monitored for replies.</p>

To edit an FT account:

1. Select **Settings** in the navigation bar and select **FT Account**.
2. Select the edit icon () in the Actions column for the account to be modified.
3. On the Edit FT Account page, select the **Validate FT Account** button to validate the FT Account Information.

If the validation is not successful, select the **TD Client Community Manager** link and try to log in. If there are issues, consult the **SAIG Enrollment Site** or call 1-800-330-5947.

If a password has been created or updated in TD Client Community Manager, select the **Sync Password** link to ensure that the Mailbox Manager and TD Client site credentials match. You can sync passwords even if the FT account is not enabled in Mailbox Manager.

Edit FT Account

This page is used to manage FT Numbers that are currently active with the Department of Education (ED).

In order to successfully validate FT Account, first login to [FTI-SAIG portal](#) using your FSA User ID credentials to ensure that your credentials are active and valid. Under Participants tab in FTI-SAIG Portal, change password, download Runtime File and retrieve Approval Code. Return to this page, upload Runtime file, enter Approval Code, then validate FT Account.

For assistance managing FT Number passwords with ED, visit [SAIG Enrollment Site](#) or call 1-800-330-5947.

General Info

FT Number ⁱ	Approval Code ⁱ	Enabled:
<input type="text" value="FT66565"/>	<input type="text" value="....."/>	<input type="checkbox"/>
Description	Choose Runtime File to upload ⁱ	<input type="button" value="Validate FT Account"/>
<input type="text" value="newuser001@test.com"/>	<input type="button" value="Choose File"/> No file chosen	
Change Password Sync Password	FT00006.rtm	
Last password change: 3/13/2024 3:05:48 PM		

User Associate Settings

Options: Manual Password Update ⁱ

Associated User Accounts

Name	Primary DPA	Secondary DPA	Remove
21.11test Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="✖"/>

4. Update the **General Info** and **User Associate Settings** as needed.

Note: You can edit an FT account without designating associated user accounts as Primary or Secondary DPA. To enable/validate the FT account, there has to be at least one (1) associated user account marked as Primary DPA.

5. Clear the **Enabled** check box to disable the account if you don't want the FT account to be available for use.
6. Select **Change Password** to update the password for the user account.

The password must have at least 15 characters, start with alphabetic character and include at least one uppercase letter, one lowercase letter, one numeric and one special character, specifically (!, @, #, \$, &, *).

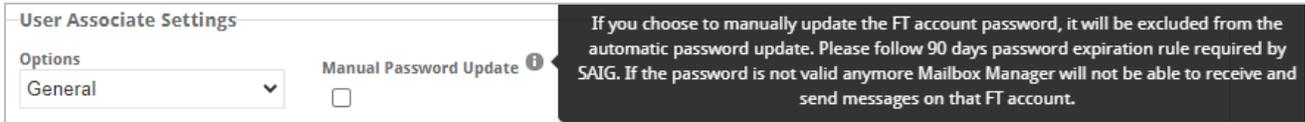
For an account number starting with FT, the **Runtime File** and **Approval Code** are additional required fields.

In the pop-up, specify the and confirm the password, and select the **Change Password** button to complete the password update.

Note: Within the execution of the ChangePassword action, a certificate is generated and then the ChangePassword function is called on the FTI-SAIG side. Logs capture successful/unsuccessful results.

Within the function, a new password is generated which contains 15 characters, at least one uppercase, one lowercase, one numeric, and one special character (!, @, #, \$, &, *), and there should be a letter before the numeric character's first appearance.

If you select manual password update, it will be excluded from the automatic password update.



7. After changing the password, select **Sync Password** to synchronize the FT account password with EDconnect in the production and test environments.
8. Personal FT account holders can enable/disable the **Manual Password Update** option for their accounts.

Personal FT accounts can be included in automated weekly password updates. The Manual Password Update configuration option allows account holders to forgo the automated updates and change their password manually every 90 days.

The Manual Password Update column in the FT account grid provides visibility and tracking of those FT numbers with Manual Passwords Updates enabled.

Mailbox Manager sends an email message instructing users to change their TD Client password preceding the anticipated expiration of credentials.

- The email is sent to the Notification Email Address specified in the [user profile](#) of the Primary DPA.
- Notifications are sent for Enabled FT Numbers only.
- The first message is sent 83 days from the last password change or sync.
- The message is sent every day until the user resets or syncs the password.
- The message contains a link to the Edit FT Account page for the respective FT Number (UI login required).
- Users of Personal accounts with manual password update will receive notification when their passwords are about to expire.
- When 90 days have passed, users cannot change their passwords from Mailbox Manager. They need to request a password reset in the SAIG portal and sync the password in Mailbox Manager as stated in the following notification.

Dear {Staff first name},

You have selected manual password update for {FT Number} in the Mailbox Manager application. TD Client requires password changes every 90 days. The TD Client password for this FT account has not been updated in more than 90 days.

Mailbox Manager will not be able to receive and send messages for this FT account with an expired password, nor can the change password functionality be used.

You can request a password reset at <https://saigportal.ed.gov/> or call SAIG Support at 800-330-5947, then [click here](#) to sync your new TD Client password with Mailbox Manager.

Thank you,

Mailbox Manager Support Team

9. Select **Save** to save your changes to the new user account.

When you change an FT account password, Mailbox Manager generates and sends an email communication to the affected users. The following is an example of the email communication:

Email Subject	Email Body/Content
Change of Password Notification	Hello {FirstName}, You are receiving this notification because the password associated with an FT account assigned to your user profile has recently changed. Please contact your system administrator for any questions related to changes made to the associated FT account. Thank you, Mailbox Manager Support Team

Export FT Account Information

When you access the list of [FT Accounts](#), you can export information to an Excel file. This is useful for producing information for audits and other compliance requests. The Excel worksheet contains the following columns of user account information:

- FT Number
- Description
- Is Active (True or False)
- Option (General or Personal)
- User Account Associates

To export the user account information:

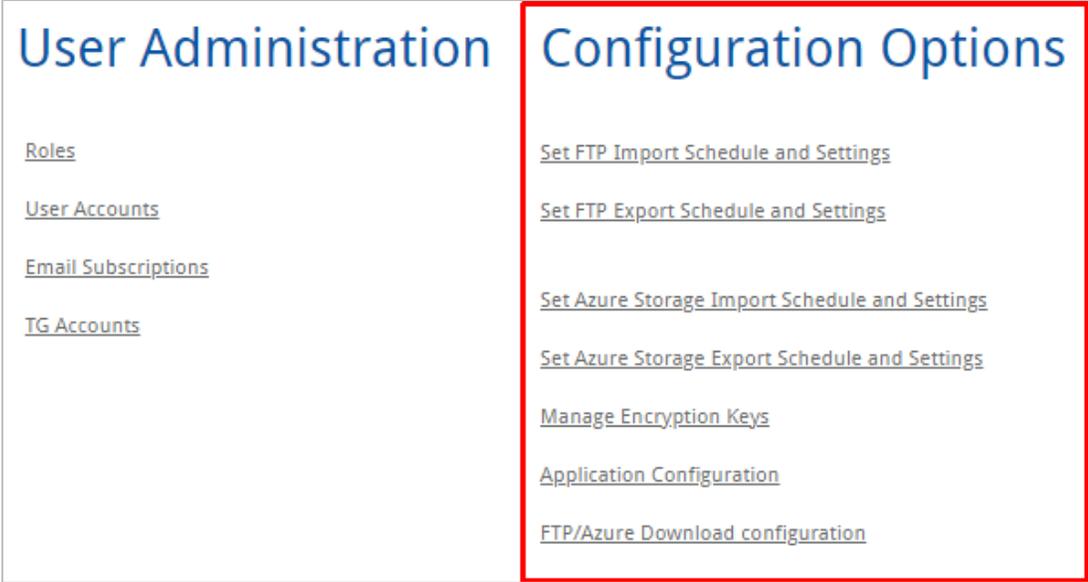
1. Select **Settings** in the navigation bar and select **FT Accounts** on the page.
2. Select the **Export** button at the top-right of the list.

This produces an Excel file and downloads it to your local system where you can save it as needed.

Configuration Options

When you select **Settings** in the [Navigation Bar](#), Mailbox Manager displays the User Administration/Configuration Options page. Administrators can access functions to manage user accounts, roles, TG Accounts, and email subscriptions for Mailbox Manager.

The Settings page also provides the tools to configure import and export schedules and settings for automatic file transfers using FTP or Azure Storage.



The screenshot shows a web interface with two main sections. The left section, titled "User Administration", contains links for "Roles", "User Accounts", "Email Subscriptions", and "TG Accounts". The right section, titled "Configuration Options" and highlighted with a red border, contains links for "Set FTP Import Schedule and Settings", "Set FTP Export Schedule and Settings", "Set Azure Storage Import Schedule and Settings", "Set Azure Storage Export Schedule and Settings", "Manage Encryption Keys", "Application Configuration", and "FTP/Azure Download configuration".

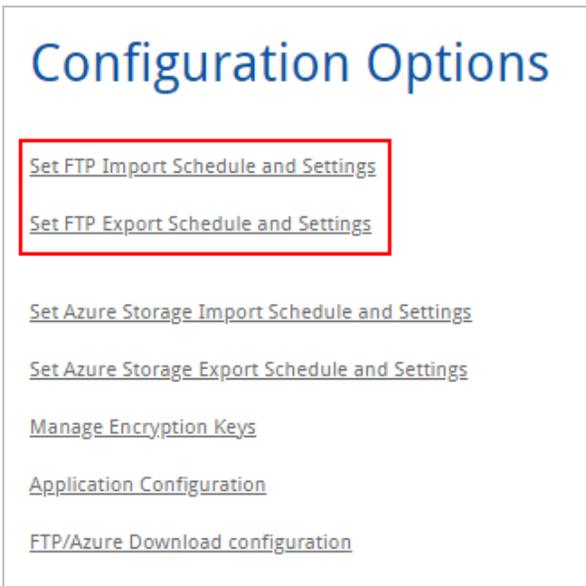
FTP Configuration

Mailbox Manager supports a File Transfer Protocol (FTP) schedule for message class files in a predetermined folder structure (directory tree) for transmission to the Department of Education (ED) and files received from ED to the designated server. An administrative user with the required permissions can configure the schedules for these transfers.

The following permissions are required to manage inbound and outbound automated file transfers in Mailbox Manager:

- Can Access/View the Settings Tab
- Can Access/View Set a Schedule for Incoming File Transfers
- Can Access/View Set a Schedule for Outgoing File Transfers
- Can Enable File Transfers for Incoming Files
- Can Edit/Delete Incoming File Transfer Fields

The FTP import/export functions are available when you select **Settings** on the navigation bar.



FTP Import Schedule and Settings

As an administrator with the required permissions, you can define a preset schedule to automatically transmit specific message class files received from the Department of Education to the designated server.

To configure automated incoming file transfers:

1. On the **Settings** page, select **Set FTP Import Schedule and Settings**.
2. Set the FTP Settings for the incoming file transfers:

FTP Import Schedule and Settings

Please complete and validate the following credentials below to receive Message Class Files to your File Transfer Protocol (FTP)

FTP Settings: ⓘ

Enabled:

File Transfer Protocol:

File Naming Convention:

Serial Number Extension (.dat file) ⓘ
 Standard Format (.txt file) ⓘ

Host: ⓘ

Port: ⓘ

Username:

Password:

Notification Email:

Validate

Ftp Storage Directory Path Settings: ⓘ

Directory Path: ⓘ

Directory Path Placeholders ⓘ

Tg number ⓘ Message class ⓘ Timestamp ⓘ

Additional Directory Path: ⓘ

Additional Directory Path: ⓘ

Schedule Settings:

Time

Time Zone

Add new Time

Message Classes

2 selected

Save

Cancel

Field	Description
Enabled	Select this check box to enable automated file transfers from the Department of Education to the designated server. You can clear this option at any point in the future to disable automated incoming transfers. Please validate the FTP Settings prior to selection of the Enabled check box.
File Transfer Protocol	Select the protocol used for the file transfers: <ul style="list-style-type: none"> • SSH: SSH File Transfer Protocol (SFTP) is a network protocol that provides access, file transfer, and file management functionality over a secure connection. • FTP (SSL/TLS): File Transfer Protocol (FTP) is a standard network protocol used to transfer computer files between a client and server on a computer network.
File Naming Convention	Select the naming convention used for the file shares: <ul style="list-style-type: none"> • Serial Number Extension (.dat file) • Standard Format (.txt file)
Host	Enter the registered host name or IP address of your FTP or FTPS server.
Port	Enter the port number set for your FTP or FTPS server. The valid range is 1-65535.
Username, Password	Enter the credentials used to access your FTP or FTPS server.
Notification Email	Enter the email address that is used by the system to send notifications of scheduled incoming file transfer events (success and failure).

3. Select the **Validate** button to perform a validation against the specified FTP parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

4. Use the **Ftp Storage Directory Path Settings** fields to configure a custom Ftp storage directory structure. Enter the directory path structure on your FTP or FTPS server used to save and store the incoming files.

Field	Description
Directory Path	This is the Directory structure on your FTP Storage where the file transfer happens. For root directory leave empty, otherwise specify the directories separated with /, for example, Directory1/Directory2 Allowed directory name characters are alphanumeric, empty space and the following special characters: !@\$%&^'~()[]{}.,;+ -=_

Field	Description
Directory Path Placeholder	<p>Drag or select these placeholders inside the Directory Path to create custom directory structure:</p> <ul style="list-style-type: none"> • TG Number: Directory will be created (if it does not exist), named with the TG number from the message that is sent • Message Class: Directory will be created (if it does not exist), named with the Message Class from the message that is sent • Timestamp: Directory will be created (if it does not exist), named with a timestamp indicating when the job was run. It appears in the following format: <code>yyyymmdd-hhmmss-milliseconds</code> (6-digit milliseconds)
Additional Directory Path	<p>This is the Additional Directory structure on your FTP Storage where the file transfer happens.</p> <p>For root directory leave empty, otherwise specify the directories separated with /, for example, Directory1/Directory2</p> <p>Allowed directory name characters are alphanumeric, empty space and the following special characters: <code>!@\$%&^*~()[]{}.,;+ -=_</code></p> <p>You to add up to two (2) additional directory paths, for a maximum of three (3). At least one directory path is required to Save.</p> <ul style="list-style-type: none"> • If you set multiple directory paths, the scheduled job will import message class files into the Mailbox Manager database from the multiple locations on FTP/Azure. • If you set multiple directory paths, the scheduled job will export the same message class file from the Mailbox Manager database to the multiple locations on FTP/Azure.

5. Use the **Schedule Settings** to specify the occurrence of the automated incoming file transfers. You can add another time slot by selecting the **Add new Time** button.

The system requires a minimum of one time slot a has maximum of seven for enabling inbound automatic file transfer. For each time slot, specify the following parameters:

Field	Description
Time	<p>Specify the time at which the system executes the scheduled file transfer each day.</p> <p>You can clear this option at any point in the future to disable automated incoming transfers.</p>
Time Zone	Set the time zone for the clock time. This is typically the time zone of your institution.

6. Select the **Message Classes** that you want to include in the automatic transfer.
7. Select **Save**.

This button is not available if you do not have a successful validation against the configured FTP setting and at least one time slot and message class selected.

FTP Export Schedule and Settings

As an administrator with the required permissions, you can define a preset schedule to automatically transmit message class files stored within a specified folder structure (directory tree) for transmission to the Department of Education.

To configure automated outgoing file transfers:

1. On the **Settings** page, select **Set FTP Export Schedule and Settings**.
2. Set the FTP Settings for the outgoing file transfers:

FTP Export Schedule and Settings

Please complete and validate the following credentials to transmit Message Class Files from your File Transfer Protocol (FTP)

FTP Settings: ¹

Enabled:

File Transfer Protocol:

Host: ¹

Port: ¹

Username:

Password:

Notification Email:

Validate

Ftp Storage Directory Path Settings: ¹

Directory Path: ¹

Directory Path Placeholders ¹

Tg number ¹

Message class ¹

Timestamp ¹

Additional Directory Path: ¹

Additional Directory Path: ¹

Automate removal of empty folders: ¹

Schedule Settings:

Time



Time Zone

Add new Time

Mailbox Settings

Mailbox Selection(s)

Save

Cancel

Field	Description
Enabled	Select this check box to enable automated file transfers to the Department of Education from the designated server. You can clear this option at any point in the future to disable automated outgoing transfers. Please validate the FTP Settings prior to selection of the Enabled check box.
File Transfer Protocol	Select the protocol used for the file transfers: <ul style="list-style-type: none"> • SSH: SSH File Transfer Protocol (SFTP) is a network protocol that provides access, file transfer, and file management functionality over a secure connection. • FTP (SSL/TLS): File Transfer Protocol (FTP) is a standard network protocol used to transfer computer files between a client and server on a computer network.
Host	Enter the registered host name or IP address of your FTP or FTPS server.
Port	Enter the port number set for your FTP or FTPS server. The valid range is 1-65535.
Username, Password	Enter the credentials used to access your FTP or FTPS server.
Notification Email	Enter the email address that is used by the system to send notifications of scheduled outgoing file transfer events (success and failure).

3. Select the **Validate** button to perform a validation against the specified FTP parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

4. Use the **Ftp Storage Directory Path Settings** fields to configure a custom FTP storage directory structure. Enter the directory path structure on your FTP or FTPS server used to save and store the incoming files.

Field	Description
Directory Path	This is the Directory structure on your FTP Storage where the file transfer happens. For root directory leave empty, otherwise specify the directories separated with /, for example, Directory1/Directory2. Allowed directory name characters are alphanumeric, empty space and the following special characters: !@\$%&^`~()[]{}.,;+ -=_

Field	Description
Directory Path Placeholder	<p>Drag or select these placeholders inside the Directory Path to create custom directory structure:</p> <ul style="list-style-type: none"> • TG Number: Directory will be created (if it does not exist), named with the TG number from the message that is sent • Message Class: Directory will be created (if it does not exist), named with the Message Class from the message that is sent • Timestamp: Directory will be created (if it does not exist), named with a timestamp indicating when the job was run. It appears in the following format: yyyyymmdd-hhmmss-milliseconds (6-digit milliseconds)
Additional Directory Path	<p>This is the Additional Directory structure on your FTP Storage where the file transfer happens.</p> <p>For root directory leave empty, otherwise specify the directories separated with /, for example, Directory1/Directory2</p> <p>Allowed directory name characters are alphanumeric, empty space and the following special characters: !@\$%&^*~()[]{}.,;+ -=_</p> <p>You to add up to two (2) additional directory paths, for a maximum of three (3). At least one directory path is required to Save.</p> <ul style="list-style-type: none"> • If you set multiple directory paths, the scheduled job will import message class files into the Mailbox Manager database from the multiple locations on FTP/Azure. • If you set multiple directory paths, the scheduled job will export the same message class file from the Mailbox Manager database to the multiple locations on FTP/Azure.
Automate removal of empty folders	<p>Empty folders may cause processing delays. This is of particular concern when timestamp is added to the Directory Path. If automation is not enabled, best practice is to manually review and remove empty folders on a regular basis.</p>

5. Use the **Schedule Settings** to specify the occurrence of the automated outgoing file transfers.

The system requires a minimum of one time slot a has maximum of seven for enabling outbound automatic file transfer. You can add another time slot by selecting the **Add new Time** button.

For each time slot, specify the following parameters:

Field	Description
Time	<p>Specify the time at which the system executes the scheduled file transfer each day.</p> <p>You can clear this option at any point in the future to disable automated outgoing transfers.</p>
Time Zone	<p>Set the time zone for the clock time. This is typically the time zone of your institution.</p>

6. Select the **Mailbox** that you want to include in the automatic transfer.
7. Select **Save**.

This button is not available if you do not have a successful validation against the configured FTP setting and at least one time slot and message class selected.

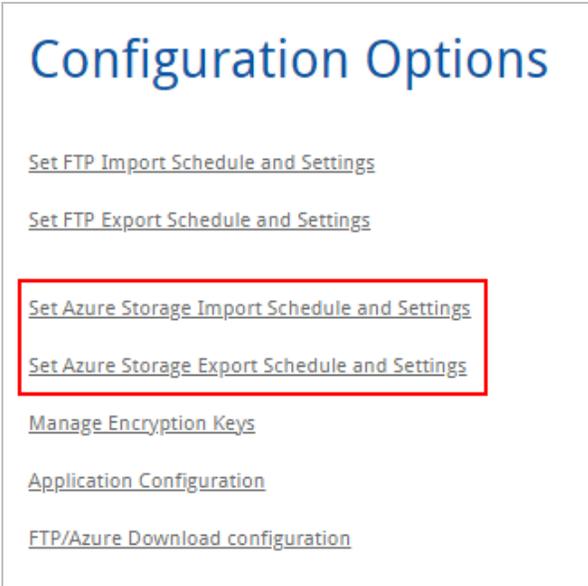
Azure Storage Configuration

Mailbox Manager supports an Azure Storage File Share for message class files in a predetermined folder structure (directory tree) for transmission to the Department of Education (ED) and files received from ED to the designated Azure Storage. An administrative user with the required permissions can configure the schedules for these transfers.

The following permissions are required to effectively manage inbound and outbound automated file transfers in Mailbox Manager:

- Can Access/View the Settings Tab
- Can Access/View Set Azure Storage Import Schedule and Settings
- Can Access/View Set Azure Storage Export Schedule and Settings
- Can Enable File Transfers for Incoming Files
- Can Edit/Delete Incoming File Transfer Fields

The Azure Storage import/export functions are available when you select **Settings** on the navigation bar.



Azure Storage Import Schedule and Settings

As an administrator with the required permissions, you can define a preset schedule to automatically transmit specific message class files received from the Department of Education to the designated server.

To configure automated incoming Azure Storage File Share:

1. On the **Settings** page, select **Set Azure Storage Import Schedule and Settings**.

Note: The image below shows the fields displayed in a single-tenant environment. In a multi-tenant environment, the following fields are managed for each tenant by Anthology staff using the Administration Portal and are not displayed in the Mailbox Manager UI.

- Account Name
- Account Key
- File Share Name

Azure Storage Import Schedule and Settings

Please complete and validate the following credentials below to receive Message Class Files to your Azure Storage File Share

Azure Storage Settings:

Enabled:

File Naming Convention:
 Serial Number Extension (.dat file)
 Standard Format (.txt file)

Account Name: Account Key:

File Share Name: Notification Email:

Azure Storage Directory Path Settings:

Directory Path: Directory Path Placeholders:

Additional Directory Path:

Additional Directory Path:

Schedule Settings:

Time: <input type="text" value="03:23 PM"/>	Time Zone: <input type="text" value="(UTC+01:00) Sarajevo, Skopje, Warsaw, Zag"/>	
Time: <input type="text" value="02:22 AM"/>	Time Zone: <input type="text" value="(UTC-06:00) Central Time (US & Canada)"/>	<input type="button" value="X"/>
Time: <input type="text" value="05:55 AM"/>	Time Zone: <input type="text" value="(UTC-06:00) Central Time (US & Canada)"/>	<input type="button" value="X"/>
Time: <input type="text" value="06:55 AM"/>	Time Zone: <input type="text" value="(UTC-06:00) Central Time (US & Canada)"/>	<input type="button" value="X"/>
Time: <input type="text" value="03:33 AM"/>	Time Zone: <input type="text" value="(UTC-06:00) Central Time (US & Canada)"/>	<input type="button" value="X"/>

Message Classes:
Message Classes:

2. Set the **Azure Storage Settings** for the incoming file transfers:

Field	Description
Enabled	Select this check box to enable automated Azure Storage file share from ED to the designated server. You can clear this option at any point in the future to disable automated incoming shares. Validate the Azure Storage Settings prior to selection of the Enabled check box.
File Naming Convention	Select the naming convention used for the file shares: <ul style="list-style-type: none"> Serial Number Extension (.dat file) Standard Format (.txt file)
Account Name	Enter the account name of your Azure Storage. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
Account Key	Enter the account key for your Azure Storage. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
File Share Name	Enter the file share name. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
Notification Email	Enter the email address that is used by the system to send notifications of scheduled incoming file transfer events (success and failure).

3. Select the **Validate** button to perform a validation against the specified Azure Storage parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

4. Use the **Azure Storage Directory Path** settings to configure custom Azure Storage directory structure.

Field	Description
Directory Path	This is the directory structure for your Azure Storage File Share where the file transfer happens. For root directory leave empty, or specify the directories separated with /, for example: Directory1/Directory2 Accepted directory name characters are alphanumeric, empty space and the following special characters: !"#\$%&'()*+,-./:;<=>@[]^_`{ }~

Field	Description
Directory Path Placeholders	<p>Drag or select these placeholders inside the Directory Path to create custom directory structure:</p> <ul style="list-style-type: none"> • TG Number: Directory will be created (if it does not exist), named with the TG number from the message that is sent • Message Class: Directory will be created (if it does not exist), named with the Message Class from the message that is sent • Timestamp: Directory will be created (if it does not exist), named with a timestamp indicating when the job was run. It appears in the following format: yyyyymmdd-hhmmss-milliseconds (6-digit milliseconds)
Additional Directory Path	<p>This is the Additional Directory structure on your Azure Storage File Share where the file transfer happens.</p> <p>For root directory leave empty, or specify the directories separated with /, for example: Directory1/Directory2</p> <p>Accepted directory name characters are alphanumeric, empty space and the following special characters: !"#\$\$%&'()*+,-./:;<=>@[]^_`{ }~</p> <p>You to add up to two (2) additional directory paths, for a maximum of three (3). At least one directory path is required to Save.</p> <ul style="list-style-type: none"> • If you set multiple directory paths, the scheduled job will import message class files into the Mailbox Manager database from the multiple locations on FTP/Azure. • If you set multiple directory paths, the scheduled job will export the same message class file from the Mailbox Manager database to the multiple locations on FTP/Azure.

5. Use the **Schedule Settings** to specify the occurrence of the automated incoming file shares.

The system requires a minimum of one time slot a has maximum of seven for enabling inbound automatic file transfer. For each time slot, specify the following parameters:

Field	Description
Time	<p>Specify the time at which the system executes the scheduled file share each day.</p> <p>You can clear this option at any point in the future to disable automated incoming shares.</p>
Time Zone	Set the time zone for the clock time. This is typically the time zone of your institution.

6. Select the **Message Classes** you want to include in the automatic transfer.
7. Select **Save**.

This button is not available if you do not have a successful validation against the configured Azure Storage setting and at least one time slot and message class selected. You can add another time slot by selecting the **Add new Time** button.

Azure Storage Export Schedule and Settings

As an administrator with the required permissions, you can define a preset schedule to automatically transmit specific message class files received from the Department of Education to the designated server.

To configure automated outgoing Azure Storage File Share:

1. On the **Settings** page, select **Set Azure Storage Export Schedule and Settings**.

Note: The image below shows the fields displayed in a single-tenant environment. In a multi-tenant environment, the following fields are managed for each tenant by Anthology staff using the Administration Portal and are not displayed in the Mailbox Manager UI.

- Account Name
- Account Key
- File Share Name

Azure Storage Export Schedule and Settings

Please complete and validate the following credentials to transmit Message Class Files from your Azure Storage File Share

Azure Storage Settings: ⓘ

Enabled:

Account Name: Account Key:

File Share Name: Notification Email:

Azure Storage Directory Path Settings: ⓘ

Directory Path: ⓘ Directory Path Placeholders ⓘ
Tg number ⓘ Message class ⓘ Timestamp ⓘ

Additional Directory Path: ⓘ

Additional Directory Path: ⓘ

Automate removal of empty folders: ⓘ

Schedule Settings:

Time:

Time Zone:

Mailbox Settings

Mailbox Selection(s):

2. Set the **Azure Storage Settings** for the outgoing file transfers:

Field	Description
Enabled	Select this check box to enable automated Azure Storage file share from ED to the designated server. You can clear this option at any point in the future to disable automated incoming shares. Please validate the Azure Storage Settings prior to selection of the Enabled check box.
File Naming Convention	Select the naming convention used for the file shares: <ul style="list-style-type: none"> Serial Number Extension (.dat file) Standard Format (.txt file)
Account Name	Enter the account name of your Azure Storage. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
Account Key	Enter the account key for your Azure Storage. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
File Share Name	Enter the file share name. In a multi-tenant environment, this field is not displayed. Its value is managed by Anthology staff.
Notification Email Address	Enter the email address that is used by the system to send notifications of scheduled outgoing file transfer events (success and failure).

3. Select the **Validate** button to perform a validation against the specified Azure Storage parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

4. Azure Storage Directory path settings is used to configure custom Azure Storage directory structure.

Field	Description
Directory Path	This is the directory structure for your Azure Storage File Share where the file transfer happens For root directory leave empty, or specify the directories separated with /, for example: Directory1/Directory2 Accepted directory name characters are alphanumeric, empty space and the following special characters: !"#\$%&'()*+,-./:;<=>@[^_`{ }~

Field	Description
Directory Path Placeholders	<p>Drag or select these placeholders inside the Directory Path to create custom directory structure:</p> <ul style="list-style-type: none"> • TG Number: Directory will be created (if it does not exist), named with the TG number from the message that is sent • Message Class: Directory will be created (if it does not exist), named with the Message Class from the message that is sent • Timestamp: Directory will be created (if it does not exist), named with a timestamp indicating when the job was run. It appears in the following format: <ul style="list-style-type: none"> ◦ Yyyymmdd-hhmmss-milliseconds (6-digit milliseconds)
Additional Directory Path	<p>This is the Additional Directory structure on your Azure Storage File Share where the file transfer happens.</p> <p>For root directory leave empty, or specify the directories separated with /, for example: Directory1/Directory2</p> <p>Accepted directory name characters are alphanumeric, empty space and the following special characters: !"#%&'()*+,-./:;<=>?@[\\]^_`{ }~</p> <p>You to add up to two (2) additional directory paths, for a maximum of three (3). At least one directory path is required to Save.</p> <ul style="list-style-type: none"> • If you set multiple directory paths, the scheduled job will import message class files into the Mailbox Manager database from the multiple locations on FTP/Azure. • If you set multiple directory paths, the scheduled job will export the same message class file from the Mailbox Manager database to the multiple locations on FTP/Azure.
Automate removal of empty folders	<p>Empty folders may cause processing delays. This is of particular concern when timestamp is added to the Directory Path. If automation is not enabled, best practice is to manually review and remove empty folders on a regular basis.</p>

5. Use the Schedule Settings to specify the occurrence of the automated incoming file shares.

The system requires a minimum of one time slot a has maximum of seven for enabling inbound automatic file transfer. You can add another time slot by selecting the Add new Time button.

For each time slot, specify the following parameters:

Field	Description
Time	<p>Specify the time at which the system executes the scheduled file share each day.</p> <p>You can clear this option at any point in the future to disable automated incoming shares.</p>
Time Zone	<p>Set the time zone for the clock time. This is typically the time zone of your institution.</p>

6. **Mailbox Settings:** Select the Mailboxes that you want to include in the automatic transfer.

7. Select **Save**.

This button is not available if you do not have a successful validation against the configured Azure Storage setting and at least one time slot and message class selected.

Encryption Keys

The Settings tab has a link to the Mailbox Manager encryption keys. Managing encryption keys for Mailbox Manager requires the following permissions:

- Can Manage Encryption Keys
- Can Manage Application Configuration

Anthology Inc. will only activate one public key at a time and will capture activity history on changes made (i.e., new uploads, inactivation of key, successful uploads, failed uploads).

The public/private key configuration supports file import, file export, and message download.

A user with appropriate permissions, can complete the following steps to manage the encryption key pairs in Mailbox Manager.

1. Select **Settings** in the navigation bar and select **Manage Encryption Keys**.

Name	Is Active	Created By	Created Date	Last Modified By	Last Modified Date	Actions
Test New	✔	NewUser001@test.com	4/27/2021 9:58:41 AM	NewUser001@test.com	4/27/2021 9:58:41 AM	
PGPPublicKey.asc	✘		7/28/2020 2:10:05 AM	nishidaa@yopmail.com	11/26/2020 2:53:04 PM	
mt_st	✘	nishidaa@yopmail.com	11/26/2020 2:53:04 PM	rick@ep.com	12/16/2020 8:05:22 AM	
Test key01	✘	rick@ep.com	12/16/2020 8:05:22 AM	NewUser001@test.com	12/29/2020 9:28:23 AM	
New keys	✘	NewUser001@test.com	12/29/2020 9:28:23 AM	NewUser001@test.com	1/22/2021 10:33:09 AM	
Latest keys	✘	NewUser001@test.com	1/22/2021 10:33:09 AM	NewUser001@test.com	2/2/2021 1:12:55 PM	
New Keys 21.2	✘	NewUser001@test.com	2/2/2021 1:12:55 PM	Security001@test.com	2/24/2021 11:25:25 AM	
test Security	✘	Security001@test.com	2/24/2021 11:25:25 AM	NewUser001@test.com	3/1/2021 12:37:50 PM	
Test Burp	✘	NewUser001@test.com	3/1/2021 12:37:50 PM	NewUser001@test.com	3/3/2021 2:30:20 PM	
21.3 Keys	✘	NewUser001@test.com	3/3/2021 2:30:20 PM	NewUser001@test.com	3/22/2021 11:48:25 AM	

A summary of the available key pairs includes the following:

Column Name	Description
Name	Key Pair Name
Is Active	A green check mark indicates the key pair is Active. A red x indicates the key pair is Inactive.

Column Name	Description
Created By	The username associated with the creation of the key pair
Created Date	The date the key pair was created.
Last Modified By	The username associated with the last modified action
Last Modified Date	The date the key pair was last modified.
Actions	The pencil icon is used to edit the key pair. The lock icon is used to download the key pair

2. Select the **New Encryption Key Pair** button.
3. Enter the **Name** for the new key pair.

4. Upload the **Public Key**. The public key is used for encryption.

New Encryption Key Pair

Name

Public Key Upload ⓘ

Choose the file to upload

 No file chosen

5. Upload the **Private Key**. The private key is used for decryption.

New Encryption Key Pair

Name

Public Key Upload ⓘ

Choose the file to upload

 No file chosen

Private Key Upload ⓘ

Choose the file to upload

 No file chosen

Password

6. (Optional) Enter the **Password** if a password is associated with the key pair.
7. Select **Save**.

Application Configuration

Important: The Application Configuration page activates file activity for Mailbox Manager only.

Managing FTP/Azure download for Mailbox Manager requires the following permissions:

- Can Access/View FTP/Azure Download configuration
- Can manage FTP/Azure Download configuration

Change Configuration setting controls the file transfer process and the message downloads. Review the available configuration options below.

The available configuration setting (File Encryption Option) are as follows:

- Plain (default value, current setting, only plain text files)
- Plain and Encrypted (plain text file and encrypted file)
This allows testing of the new encryption process, while still receiving the normal plain text file.
- Encrypted (only encrypted file)

To configure the application:

1. Navigate to the **Settings** tab and select **Application Configuration**.
2. Select appropriate values from the drop-down fields, specify the password for user download file encryption, and enable the session timeout.

The screenshot shows the 'Application Configuration' page with the following settings:

- User Download File Encryption:** Plain and Encrypted
- File Download Location Option:** Local
- Set Password for User Download File Encryption:** (password field with 7 dots)
- Import Job File Encryption:** Plain and Encrypted
- Export Job File Encryption:** Encrypted
- Enable Session Timeout:** Yes
- Session Timeout in minutes:** 59

An 'Update' button is located at the bottom left of the configuration area.

Important: The default setting for file import, file export, and message download is to Plain.

See below for an explanation of the available categories and options.

Note: The encryption options are as follows:

- **Plain:** The file is in a password protected folder and requires WinZip or 7-Zip to extract.
- **Encrypted:** The file is encrypted with the appropriate key and requires decryption.
- **Plain and Encrypted:** The system generates two files. One file is in a password protected folder and requires WinZip or 7-Zip to extract. The second file is encrypted with the appropriate key and requires decryption.

Category	Explanation
User Download File Encryption	Encryption for a message class file downloaded from the Message Class History table in Mailbox Manager. The options are: <ul style="list-style-type: none">• Plain• Encrypted• Plain and Encrypted
File Download Location Options	<p>The file download location options are:</p> <ul style="list-style-type: none">• Local• FTP• Azure <p>After the Download Location has been set here, users with permission can add/edit the FTP or Azure download location setting on the FTP/Azure Download Configuration page.</p> <p>The FTP/Azure Download Configuration options have been added to create specific locations for manually downloaded files. Previously, the files downloaded manually through the user interface were saved on the user's local machine by default. The download configuration functionality provides additional security and oversight of the file download location.</p> <p>Note: This functionality is for direct downloads from the Messages page through the user interface. File transfers via scheduled jobs are not impacted.</p>
Set Password for User Download File Encryption	The password must be between 6 and 100 characters and must contain all of the following: an uppercase letter, a lowercase letter, a number (0-9), and a special character.
Import Job File Encryption	The import job file encryption options are: <ul style="list-style-type: none">• Plain• Encrypted• Plain and encrypted

Category	Explanation
Export Job File Encryption	The export job file encryption options are: <ul style="list-style-type: none"> • Plain • Encrypted • Plain and Encrypted
Enable Session Timeout	Select whether a session timeout should occur.
Session Timeout in minutes	Specify the session timeout period in minutes.

3. Select **Update** to save your settings.

FTP/Azure Download Configuration

Users with appropriate permission can add/edit the FTP or Azure download location setting after the Download Location has been set on the [Application Configuration](#) page.

The FTP/Azure Download Configuration options have been added to create specific locations for manually downloaded files. Previously, the files downloaded manually through the user interface were saved on the user's local machine by default. The download configuration functionality provides additional security and oversight of the file download location.

Note: This functionality is for direct downloads from the Messages page through the user interface. File transfers via scheduled jobs are not impacted.

To configure FTP/Azure downloads:

1. From the **Settings** page, select **FTP/Azure Download Configuration**.
2. Select an option:
 - FTP Download Location Configuration
 - Azure Download Location Configuration
3. For **FTP Download Location Configuration**, specify the values shown below.

File Download Location Configuration

Select Configuration:

Ftp Download Location Configuration ▼

File Transfer Protocol:

SSH ▼

Host: ⓘ

192.168.1.100

Port: ⓘ

21

Username:

sftp

Password:

.....

Directory Path: ⓘ

uploads

Validate

Save

Field	Description
File Transfer Protocol	Select the protocol used for the file transfers: <ul style="list-style-type: none">• SSH: SSH File Transfer Protocol (SFTP) is a network protocol that provides access, file transfer, and file management functionality over a secure connection.• FTP (SSL/TLS): File Transfer Protocol (FTP) is a standard network protocol used to transfer computer files between a client and server on a computer network.
Host	Enter the registered host name or IP address of your FTP or FTPS server.
Port	Enter the port number set for your FTP or FTPS server. The valid range is 1-65535.
Username, Password	Enter the credentials used to access your FTP or FTPS server.
Directory Path	Enter the directory path structure on your FTP or FTPS server used to store the downloaded files.

4. Select the **Validate** button to perform a validation against the specified FTP parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

5. Select **Save**.

This button is not available if you do not have a successful validation against the configured FTP/Azure setting and at least one time slot and message class selected.

- For **Azure Download Location Configuration**, specify the values shown below.

File Download Location Configuration

Select Configuration:
Azure Download Location Configuration ▼

Account Name:

Account Key:

File Share Name:

Directory Path: ⓘ

Validate

Save

Field	Description
Account Name	Enter the account name of your Azure Storage.
Account Key	Enter the account key for your Azure Storage.
File Share Name	Enter the file share name.
Directory Path	<p>This is the directory structure for your Azure Storage File Share where the downloads are stored.</p> <p>For root directory leave empty, or specify the directories separated with /, for example: Directory1/Directory2</p> <p>Accepted directory name characters are alphanumeric, empty space and the following special characters: !"#\$%&'()*+,-./:;<=>?@[^_`{ }~</p>

- Select the **Validate** button to perform a validation against the specified Azure Storage parameters.

Important: If you make any revisions after the initial validation, you must repeat this step to connect to the configured server.

- Select **Save**.

This button is not available if you do not have a successful validation against the configured FTP setting and at least one time slot and message class selected.

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Encryption

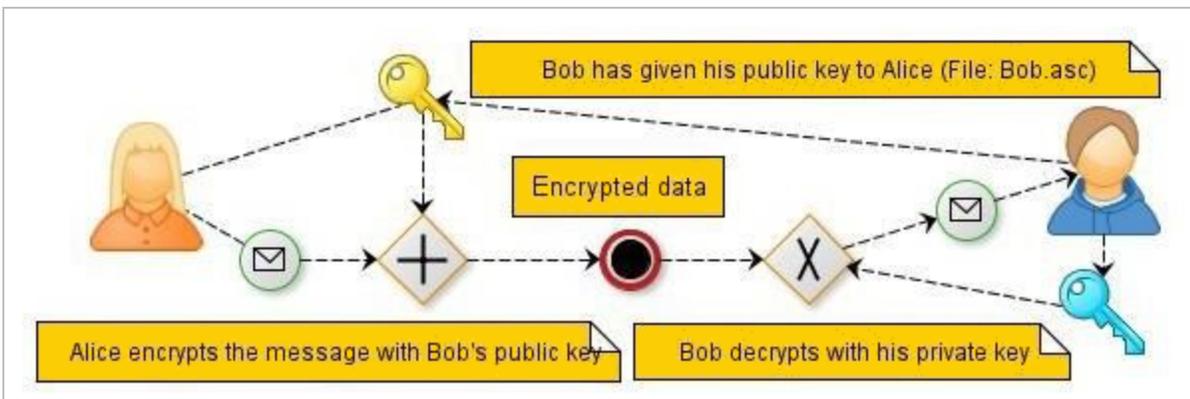
Anthology Inc. implemented a process to secure sending and receiving of files to and from File Transfer Protocol (FTP) and Azure Cloud Storage. This process uses the [OpenPGP](#) encryption standard with public key cryptography. The public/private key flow is used when transmitting files with data that could include personal identifiable information (PII) or secondary personal identifiable information (SPII).

The encryption process applies to the following products:

- Student Verification (SV) Staff Portal
- Financial Aid Solutions (FAS) Staff Portal
- Mailbox Manager (MM)

A high-level overview of the public/private key process is outlined below.

- The recipient (client) of the file(s) generates a public key and a private key.
 - The public key is used for encryption.
 - The private key is used for decryption.
- The recipient gives the public key to the sender (Anthology Inc.).
- The sender uses the public key to encrypt the file.
- The sender sends the encrypted file to the recipient.
- The recipient decrypts the file with his/her private key.



Example: Bob (recipient) uses software to generate a public and private key. Bob then uploads his public key, so Alice (sender) can encrypt files that she sends to Bob's FTP location.

Setup

The first step in the setup process is generation and management of new public and private keys. It is very important that once the keys have been generated that they are safeguarded, and a standard operating procedure is developed. The ownership and management of the public and private key generation is the sole responsibility of

the client. Anthology Inc. will not be able to retrieve or access public keys unless given to us by the client. Your private key will remain internal and should not be shared outside of your organization nor with Anthology Inc. (outside of the normal upload process).

Important: Client management of the public and private key is crucial. Ensure your private key is safeguarded. Files will be encrypted from Anthology Inc. using the public key associated with the private key. The private key will be stored on the hard drive of the computer in which the keys were generated. If this computer becomes damaged or lost, the process of decrypting files will be lost, and Anthology Inc. will not be able to generate encrypted files again. Please export your private key and store it on an external drive and then re-import it on a new computer.

Download PGP Software

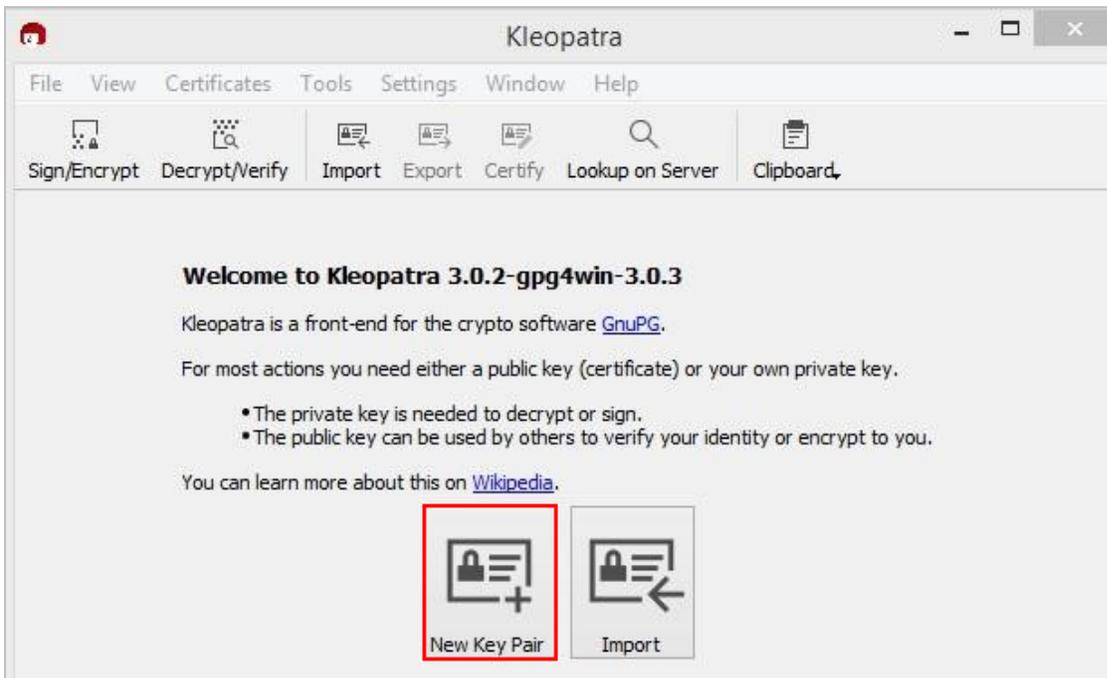
Multiple free tools are available to generate and manage public and private keys. For purposes of this guide, we are using the Kleopatra 3.1.11 -gpg4win-3.1.12 software (Windows).

- <https://pgptool.github.io/>

Download one of the PGP software tools listed above or your preferred software aligning with the PGP. Be sure to select the **.ASC** extension as one of your selections when downloading the new tool.

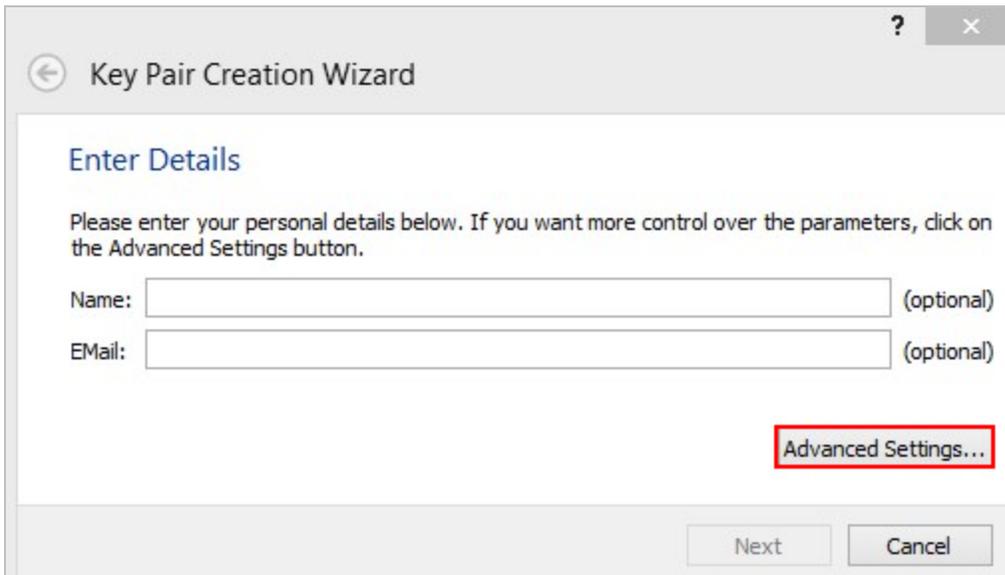
After installing your new software, complete the following steps to generate and manage public and private key(s):

1. Open **Kleopatra**.

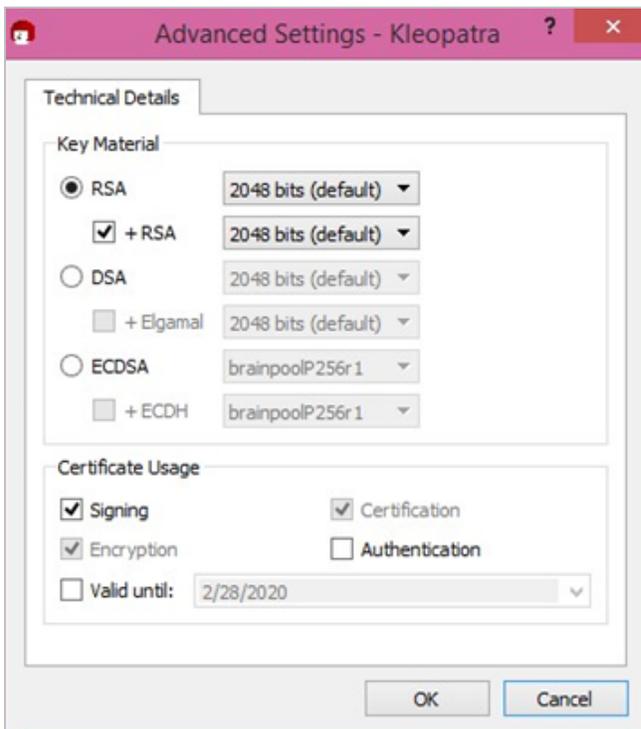


2. Select **New Key Pair**. The New Key Pair Wizard will generate a public and private key upon saving. The Key Pair Creation Wizard will require the following:

- Name
- Email
- Key Material
 - RSA (2048 bits default)
- Certification Usage
 - Signing
 - Certification
 - Encryption
- Valid Until (if checked, an expiration date will be required and set for your public and private key)

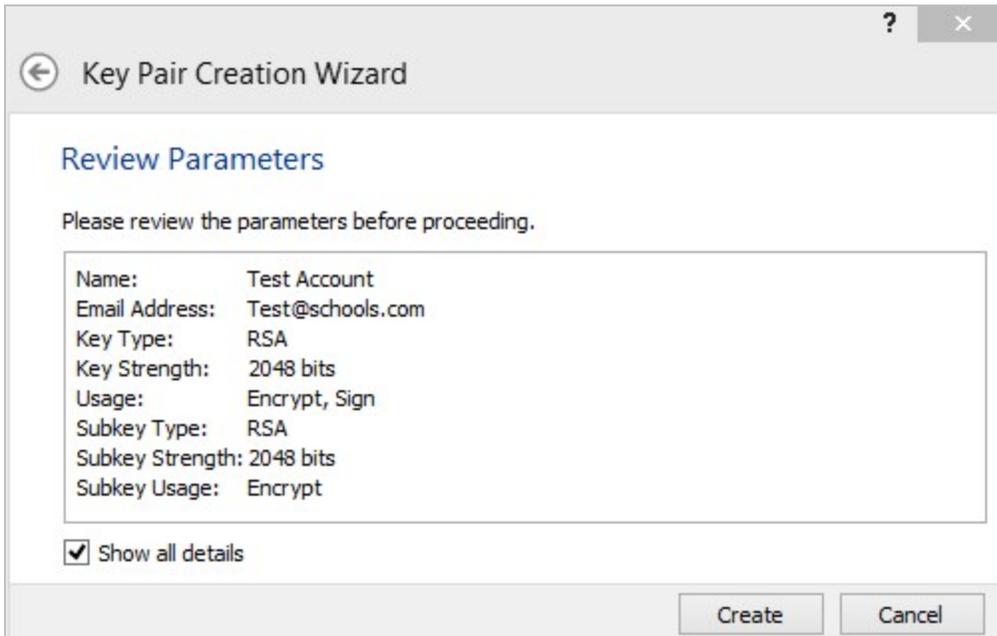


Select **Advanced Setting** to review additional parameters.

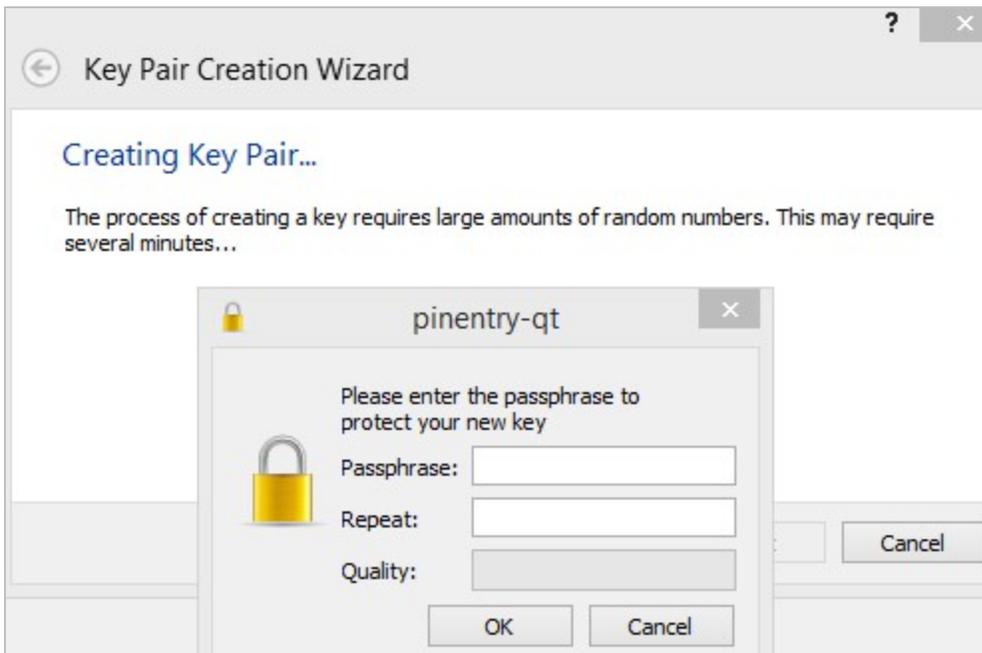


Important: If an expiration date is set for your public key and Anthology Inc. is not made aware prior to the expiration, files sent during this time period will be lost and cannot be re-generated. It is important to ensure Anthology Inc. has the most recent public key on file.

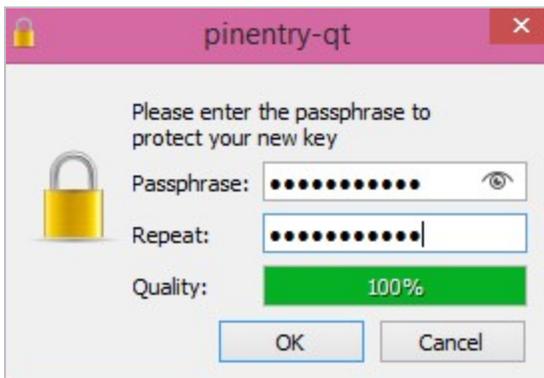
3. Select **OK**. The Review Parameters window appears. Be sure to select the **Show all details** check box. After review, select the **Create button** to proceed.



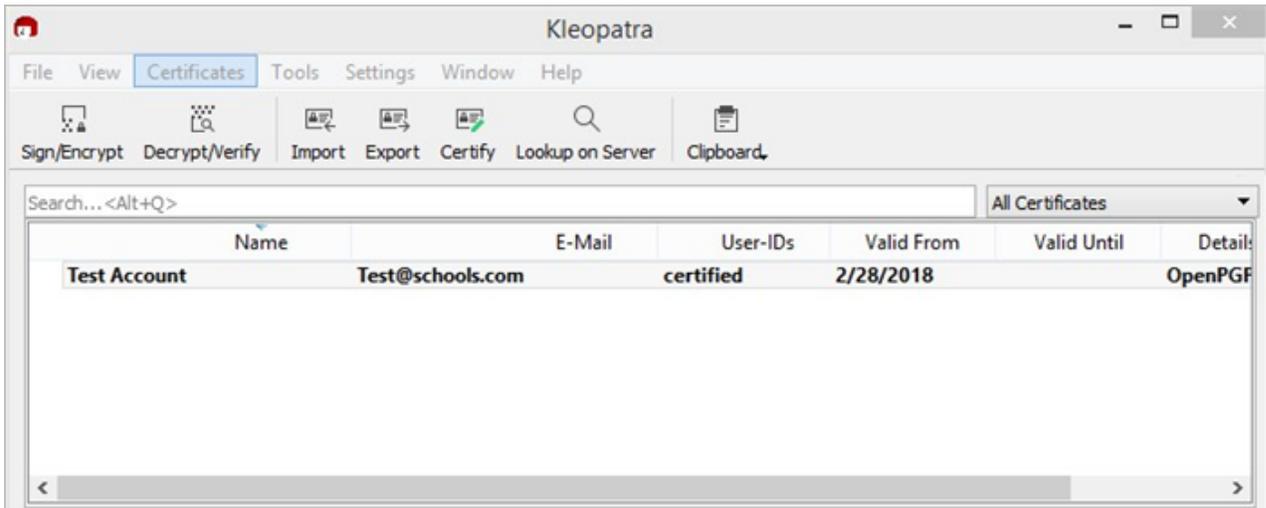
4. In the Creating Key Pair... window, to enter a **Passphrase** to protect your new key.



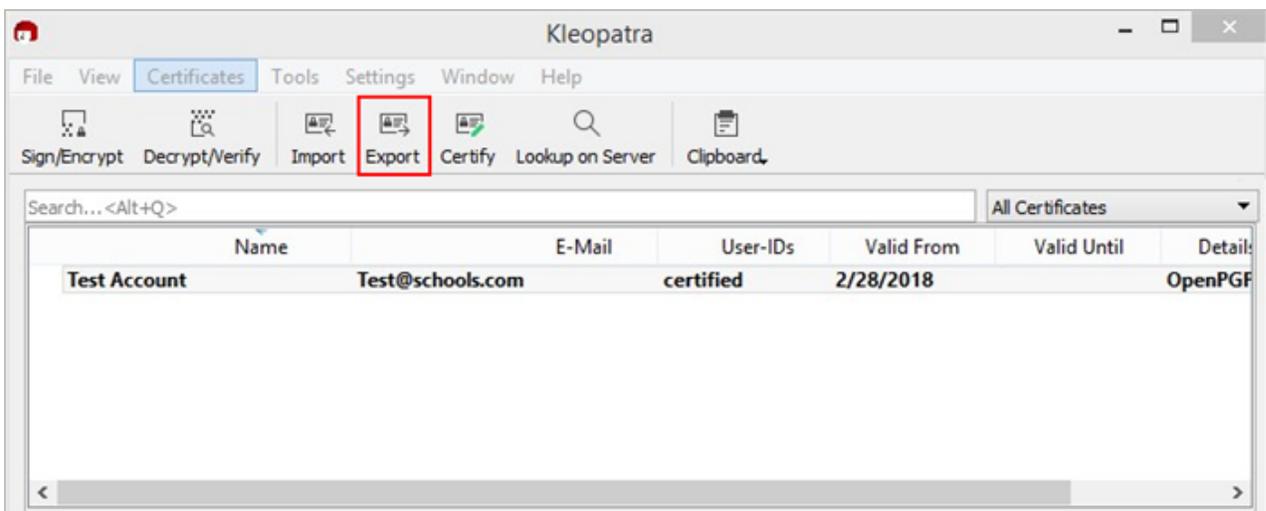
The quality of the passphrase will be monitored, and you will be prompted to re-enter should it not meet the strong requirements standard.



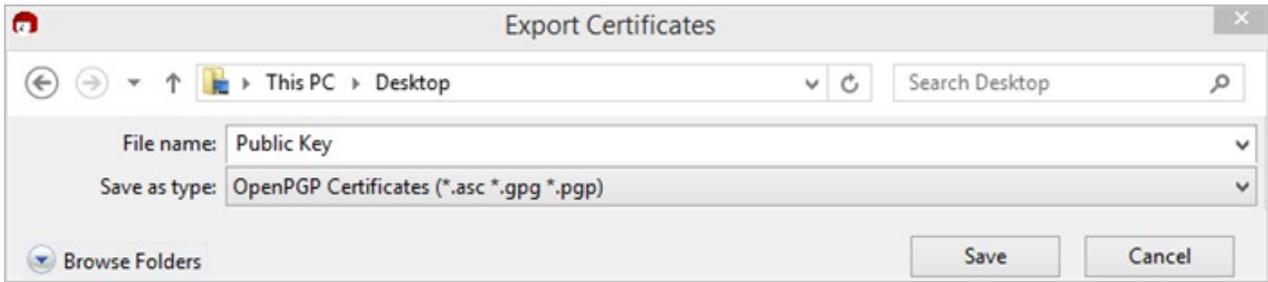
5. Select **OK**.
6. The main Kleopatra page appears after successfully generation of the key pair.



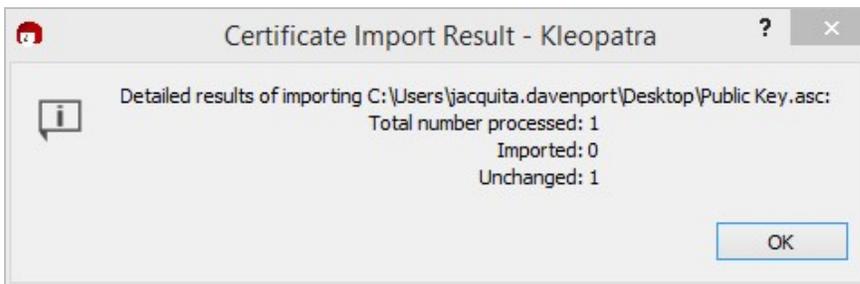
7. Select the **Export** option located in the menu header.



- In the Export Certificates dialog, update the **File Name** (if needed) and **Save** the public key to preferred location.



- The Certificate Import Result window displays the processed, imported, and unchanged statuses. (This will also appear if the saved file is selected.)



- Select **OK**. Proceed to the next step. See [Store the Public Key](#).

Store the Public Key

The second step in the setup process is to store the newly created public key (or if the public key changes over time).

The setup process for the key pair is different for Mailbox Manager and the Student Verification (SV) and Financial Aid Solutions (FAS) Staff Portal.

SV and FAS Staff Portal

Required Permissions:

- Can Upload Public Keys

Anthology Inc. will only activate one public key at a time and will capture activity history on changes made (i.e., new uploads, inactivation of key, successful uploads, and failed uploads).

To upload a public key in the Staff Portal:

- As a user with the required permissions, under Site Administration on the Administrator Tasks menu, select **Public Keys**.

Site Administration	
Announcements	High Schools
Non-Title IV Funds	Partners
Email Templates	Reports
Email Template Types	Referral Question Options
Email Subscriptions	Assistance Request Emails
API: Event Management	Public Keys

- On the Public Key page, select the **Browse** button to locate your public key file. Once successfully located, select **Upload**.

Public Key

Public Key

Current public key file can be downloaded on the link below.

Current Public Key File: No ASC Public Key On File for Open PGP Encryption.

File Encryption Configuration: SendPlain

Please upload an ASC public key file for OpenPGP encryption.

Upload Public Key File:

Important:

- Upload an ASC public key file for OpenPGP encryption.
- Ensure successful upload before navigating away from the screen. The new file should appear in the Current Public Key file field.
- The Activity History will be displayed below the Upload screen once the first upload occurs.

- Upon successful upload, the **Current Public Key File** field shows the new public key.

Public Key

Public Key

Current public key file can be downloaded on the link below.

Current Public Key File: **Public Key.asc**

File Encryption Configuration: **SendEncrypted**

Please upload an ASC public key file for OpenPGP encryption.

Upload Public Key File:

Mailbox Manager Encryption

Mailbox Manager is designed to allow the management of a client's SAIG message classes which includes the process of uploading and downloading messages to and from the SAIG gateway portal.

Required Permissions:

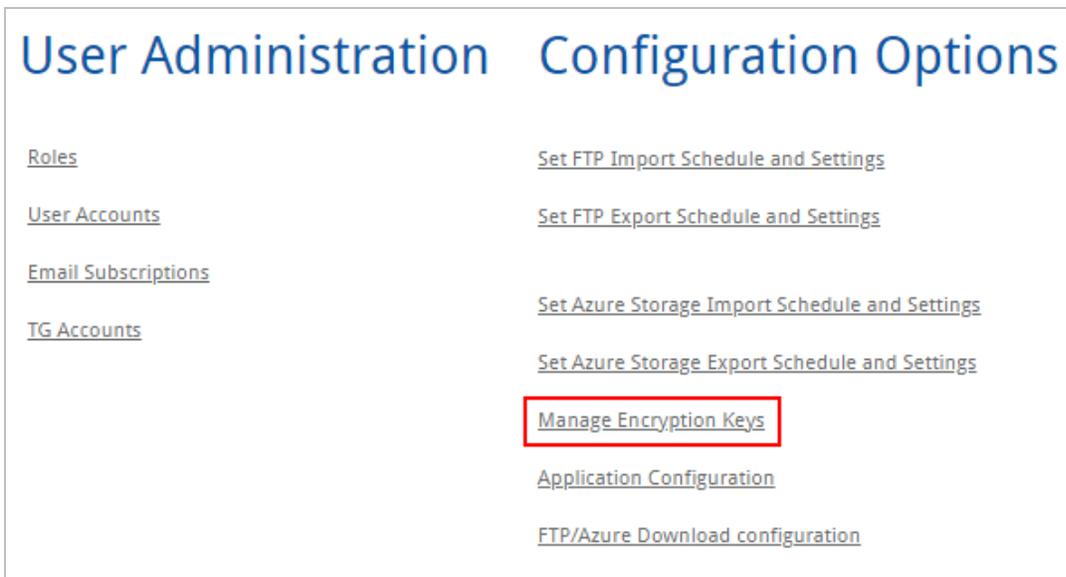
- Can Manage Encryption Keys
- Can Manage Application Configuration

Anthology Inc. will only activate one public key at a time and will capture activity history on changes made (i.e., new uploads, inactivation of key, successful uploads, and failed uploads).

The public/private key configuration supports file import, file export, and message download.

To manage the encryption key pairs in Mailbox Manager:

1. As a user with the required permissions, log in to Mailbox Manager at [https://-mailboxcmc.educationpartners.com/](https://mailboxcmc.educationpartners.com/)
2. Select the **Settings** tab.
3. Select **Manage Encryption Keys**.



4. Select the **New Encryption Key Pair** button.
5. Enter the **Name** for the new key pair.

6. Upload the **Public Key**. The public key is used for encryption.

New Encryption Key Pair

Name

Public Key Upload ⓘ

Choose the file to upload

 No file chosen

7. Upload the **Private Key**. The private key is used for decryption.

New Encryption Key Pair

Name

Public Key Upload ⓘ

Choose the file to upload

 No file chosen

8. (Optional) Enter the **Password** if a password is associated with the key pair.
9. Select **Save**.

A summary of the available key pairs is visible on the main Encryption Key Pairs page. The summary includes the following.

Column Name	Description
Name	Key Pair Name
Is Active	A green check mark indicates the key pair is Active. A red x indicates the key pair is Inactive.
Created By	The username associated with the creation of the key pair
Created Date	The date the key pair was created.
Last Modified By	The username associated with the last modified action
Last Modified Date	The date the key pair was last modified.
Actions	The pencil icon is to edit the key pair. The lock icon is to download the key pair

Important: The Application Configuration page activates file activity for Mailbox Manager only.

Message Class Download Update

Mailbox Manager will download message class files by default in plain text file (no encryption). The encryption process will be activated after the completion of the initial setup and selection of **Send Plain and Encrypted** or **Send Encrypted**.

To encrypt downloaded messages:

1. In Mailbox Manager, select the **Messages** tab.
2. Select the check box(es) for message class file(s) to download and then select **Download Checked**.

SAIG Message History

Search Criteria

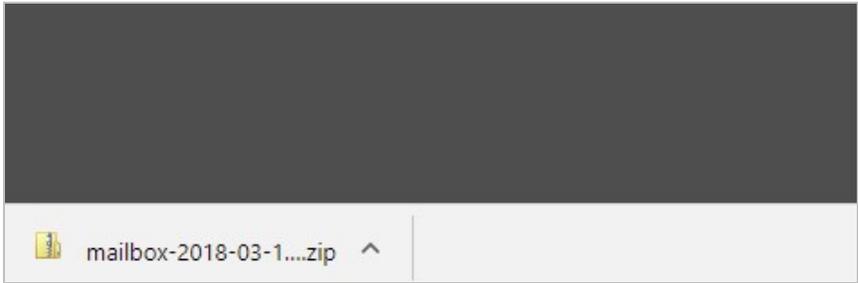
Class Group: All | Mailbox: All
 Message Class: All | Sender Type: All
 Direction: All | Downloaded: All
 Start Date: 4/15/2021 | End Date: 5/15/2021

[Download Checked](#) | [Export Current Page](#) | [Export All Rows](#) | Total Records: 754 | Records Per Page: 10

<input type="checkbox"/>	Direction	Message Class	Description	Sender Mailbox	Receiver Mailbox	Document ID	Batch Number	Received Date	Download	System Received Date	Sender	Notes
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	03820191125		4/29/2021 4:03:57 AM		11/26/2019 12:31:40 AM	SAIG	
<input checked="" type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	03720191122		4/29/2021 4:03:57 AM		11/23/2019 12:31:26 AM	SAIG	
<input checked="" type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	03220191115		4/29/2021 4:03:57 AM		11/16/2019 12:31:28 AM	SAIG	
<input checked="" type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	03020191113		4/29/2021 4:03:57 AM		11/14/2019 12:31:43 AM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02920191112		4/29/2021 4:03:57 AM		11/13/2019 1:31:04 AM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02820191108		4/29/2021 4:03:57 AM		11/9/2019 12:31:13 AM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02620191106		4/29/2021 4:03:57 AM		11/7/2019 12:31:37 AM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02320191101		4/29/2021 4:03:57 AM		11/1/2019 11:31:04 PM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02220191031		4/29/2021 4:03:57 AM		10/31/2019 11:31:33 PM	SAIG	
<input type="checkbox"/>	In	IDAP21OP	ISIR Data - Daily Application	TG66400	TG50002	02120191030		4/29/2021 4:03:57 AM		10/30/2019 11:31:18 PM	SAIG	

1 2 3 4 5 Next > Last >>

3. The browser displays the downloaded zip file. Save it in a preferred location.



4. The newly downloaded folder contains two files when set to **Send Plain and Encrypted**.

- A compressed (zipped) folder which requires the default Mailbox Manager password
- An encrypted (OpenPGP Binary) file using the public key

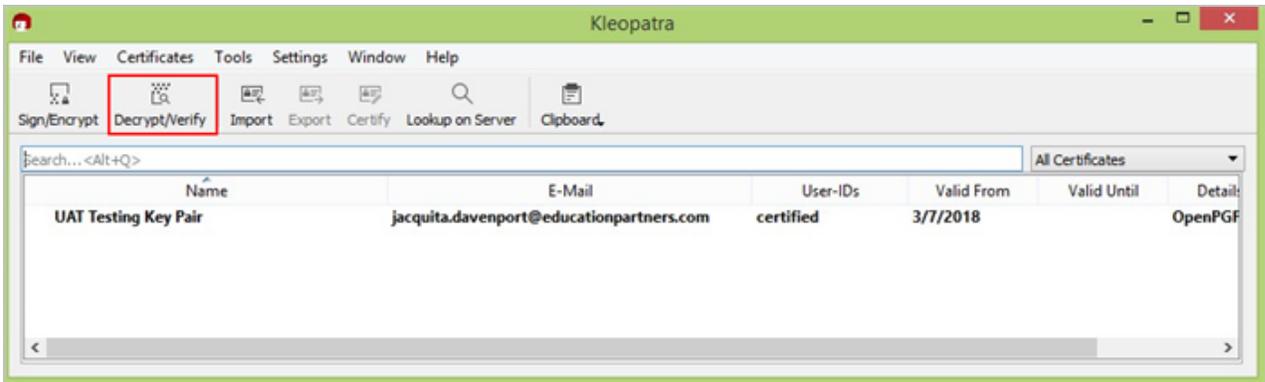
Name	Type	Compressed size	Password ...	Size
 mailbox-2018-03-13-15-21-13.64845	Compressed (zipped) Fol...	9,399 KB	No	
 mailbox-2018-03-13-15-21-13.6484...	OpenPGP Binary File	9,820 KB	No	

Important:

The file mailbox-2018-03-13-15-21-13.64845 is the plain text file and requires the normal password and extraction to open the file.

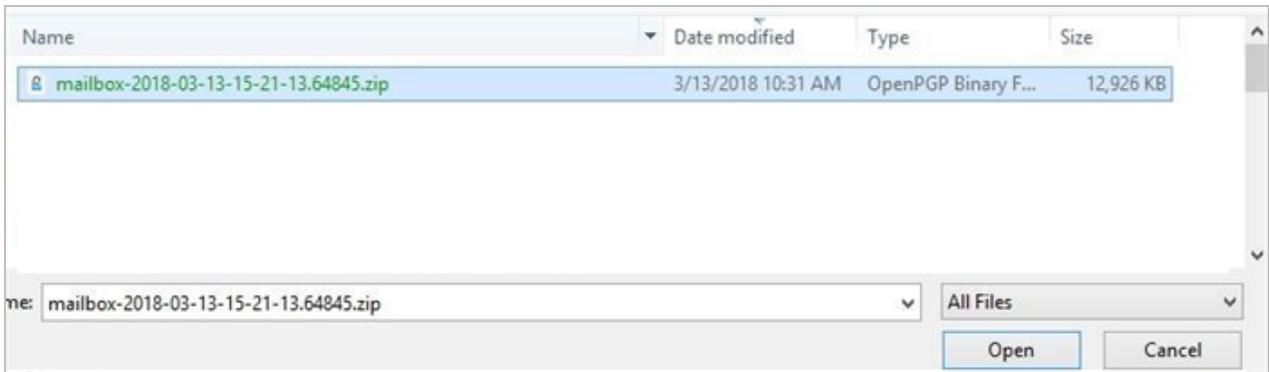
The file mailbox-2018-03-13- 1521-13.64845.zip highlighted in the image above is encrypted with the uploaded public key.

5. Open the software that was used to generate the public and private key pair. Select the **Decrypt/Verify** option.

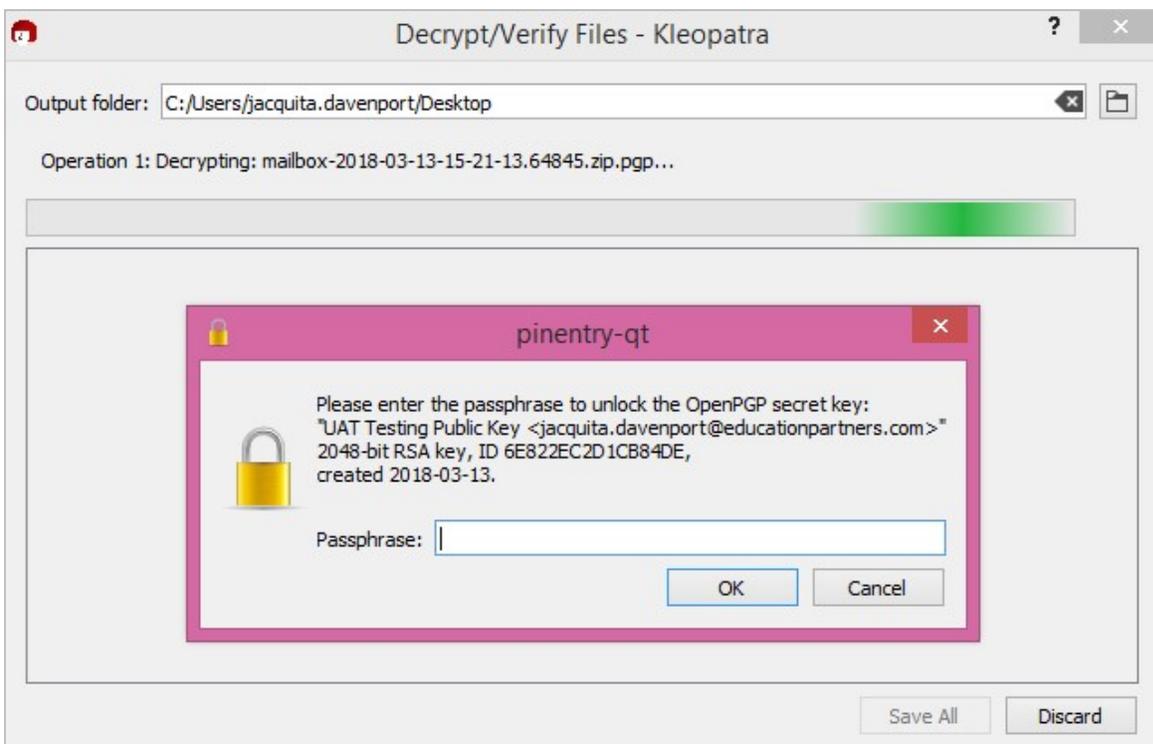


6. Browse for the encrypted file in the Mailbox Manager zipped folder.

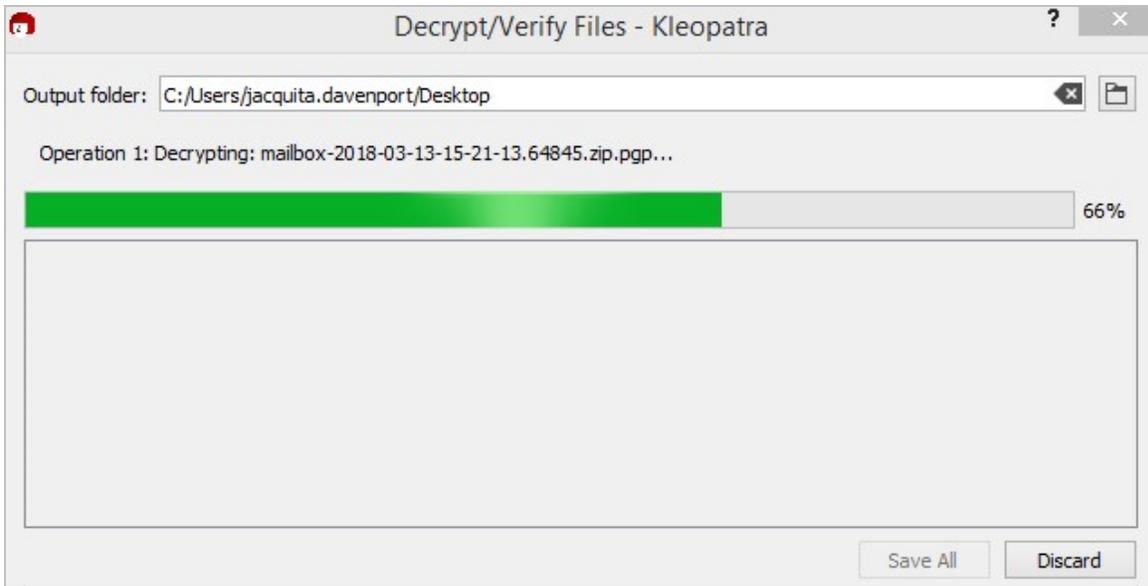
Note: The easiest way to locate the encrypted file is to save it to your Desktop or Extract All out of the folder.



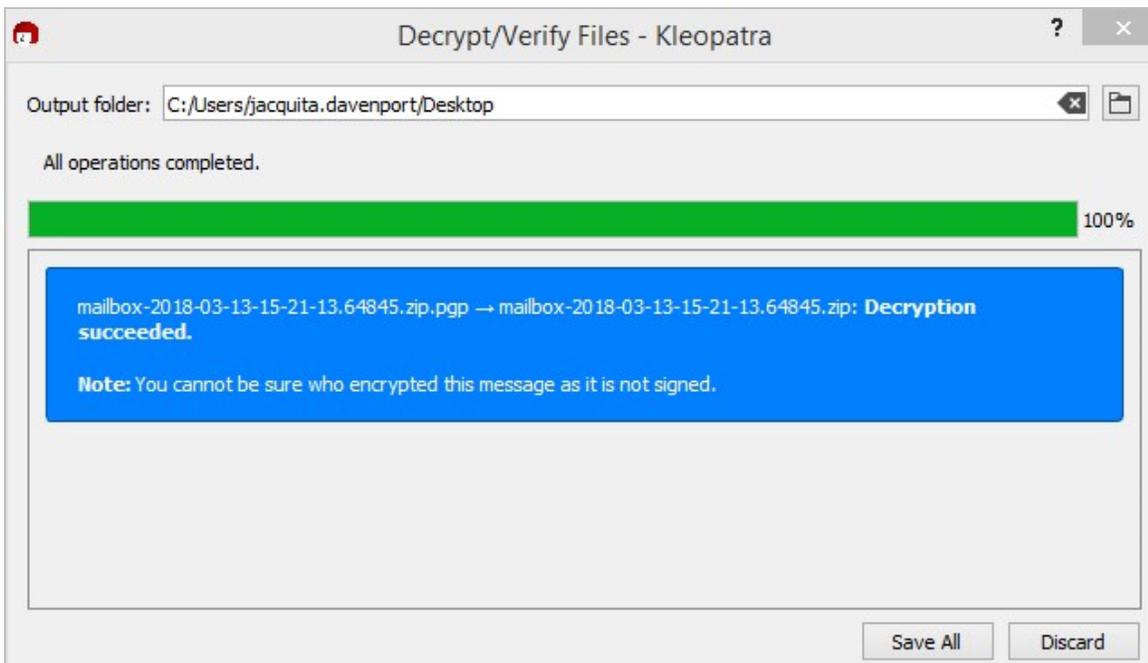
7. The Decrypt/Verify Files – Kleopatra dialog prompts for the **Passphrase** associated with the public/private key pair.



8. The decryption process begins after successfully entry of the passphrase.



9. A confirmation appears once the decryption process is complete.



10. The decrypted file will appear in the saved location.

Name	Date modified	Type	Size
mailbox-2018-03-13-15-21-13.64845	3/13/2018 10:33 AM	Compressed (zipp...	9,399 KB
mailbox-2018-03-13-15-21-13.64845.zip	3/13/2018 10:31 AM	OpenPGP Binary F...	12,926 KB

11. The message class file is available for processing as needed.

Name	Type	Compressed size	Password ...	Size
 CORR12IN.DAT	Compressed (zipped) Fol...	9,371 KB	No	
 EFSFLEIN	DAT File	29 KB	No	

File Transfer Export and Import Schedule and Settings

The file transfer process supports encryption for incoming and/or outgoing message classes to and from the Department of Education.

As default message class files will be sent (imported) as plain text, when encryption is enabled, the system will encrypt the files and prepare for submission to the configured FTP or Azure Cloud Storage location.

The system will accept a file encrypted by the institution and decrypt it with the appropriate key pair. When encryption is enabled, the system will decrypt the file and prepare for submission to Department of Education system.

The configuration to Send Plain and Encrypted will display two files both with the same file name and time stamp. The encrypted file will be tagged OpenPGP Binary file and will require a manual decryption or automated decryption to process the file into your internal system.

The configuration for the FTP or Azure Storage Export and Import Schedule is in the **Settings** menu on Mailbox Manager.

Note: See [Configuration Options](#) for additional information on setup for the FTP and Azure Storage process.

Change Configuration Settings

The third step in the process is to change the configuration settings associated with the file transfer process. This step begins the adoption phase as it allows the customer to set the format in which file(s) are transferred to FTP or email.

The available configuration settings (File Encryption Option) are as follows:

- Send Plain (default value, current setting, sends only plain text files)
- Send Plain and Encrypted (send plain text file and encrypted file)
 - This allows testing of the new encryption process, while still receiving the normal plain text file.
- Send Encrypted (send only encrypted file)

To change the configuration settings:

1. In Mailbox Manager, select the Settings tab and select **Application Configuration**.
2. Select appropriate values from the drop-down fields and specify the password for user download file encryption if needed.

Application Configuration

User Download File Encryption
 ▼

Set Password for User Download File Encryption ⓘ

Import Job File Encryption
 ▼

Export Job File Encryption
 ▼

Enable Session Timeout
 ▼

File Download Location Option
 ▼

Session Timeout in minutes

Important: The default setting for file import, file export, and message download is to send plain text.

See below for an explanation of the available categories and options.

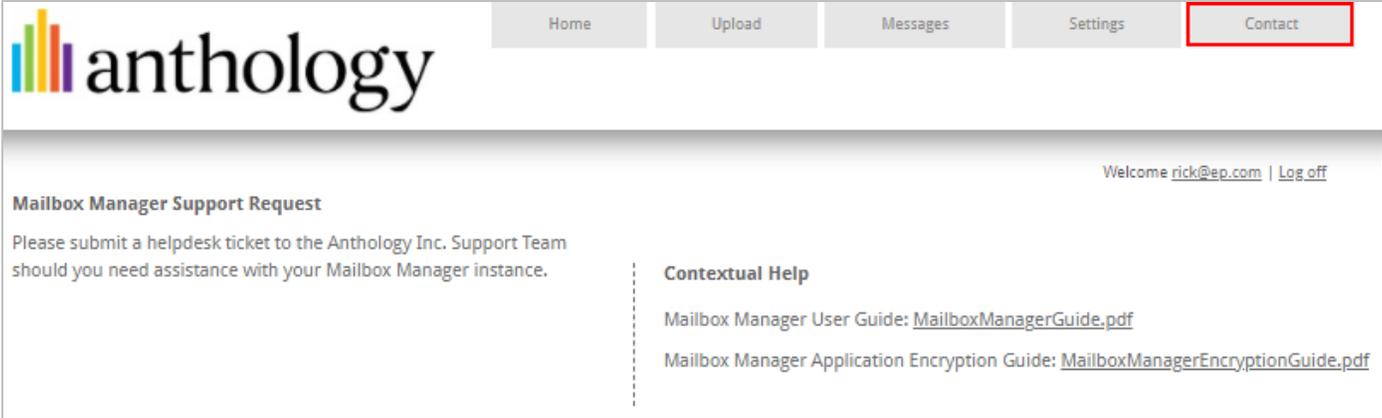
Category	Explanation
User Download File	A message class file downloaded from the Message Class History table in the Mailbox Manager
Import Job File	A message class file transfer via FTP or Azure Storage
Export Job File	A message class file transfer via FTP or Azure Storage

Available Options	Description
Send Plain	The file is in a password protected folder and requires WINZIP or 7ZIP to extract
Send Plain and Encrypted	The system generates two files. One file is in a password protected folder and requires WINZIP or 7ZIP to extract. The second file is encrypted with the appropriate key and requires decryption
Send Encrypted	The file is encrypted with the appropriate key and requires decryption

Note: See [Application Configuration](#) for additional information.

Contact

Use the Contact option on the navigation menu to learn technical support and other helpful information on Mailbox Manager.



The screenshot shows the Anthology Mailbox Manager interface. At the top left is the Anthology logo. To its right is a navigation menu with five items: Home, Upload, Messages, Settings, and Contact. The Contact item is highlighted with a red border. Below the navigation menu, the main content area is divided into two columns. The left column contains a section titled "Mailbox Manager Support Request" with the text: "Please submit a helpdesk ticket to the Anthology Inc. Support Team should you need assistance with your Mailbox Manager instance." The right column contains a section titled "Contextual Help" with two links: "Mailbox Manager User Guide: [MailboxManagerGuide.pdf](#)" and "Mailbox Manager Application Encryption Guide: [MailboxManagerEncryptionGuide.pdf](#)". In the top right corner of the main content area, there is a user greeting: "Welcome [rick@ep.com](#) | [Log off](#)".