



Internet

## Administrator's Guide





## Notices

## **NOTICES**

### *Notices*

## **NOTICES**

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**NOTICES**  
*SurfControl Sales*

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## Chapter 1

## Introduction

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# WELCOME TO SURFCONTROL REPORT CENTRAL

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This chapter explains how SurfControl Report Central works, and introduces you to the various reporting and configuration options.

Before you can use Report Central effectively, you need to:

- Create user accounts, set their permission levels and specify the types of reports users can access.

See Chapter 2 “Configuration” on page 11 for details on these settings.

## GETTING STARTED

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You have two methods of connecting to Report Central:

From the **Start** menu, select either:

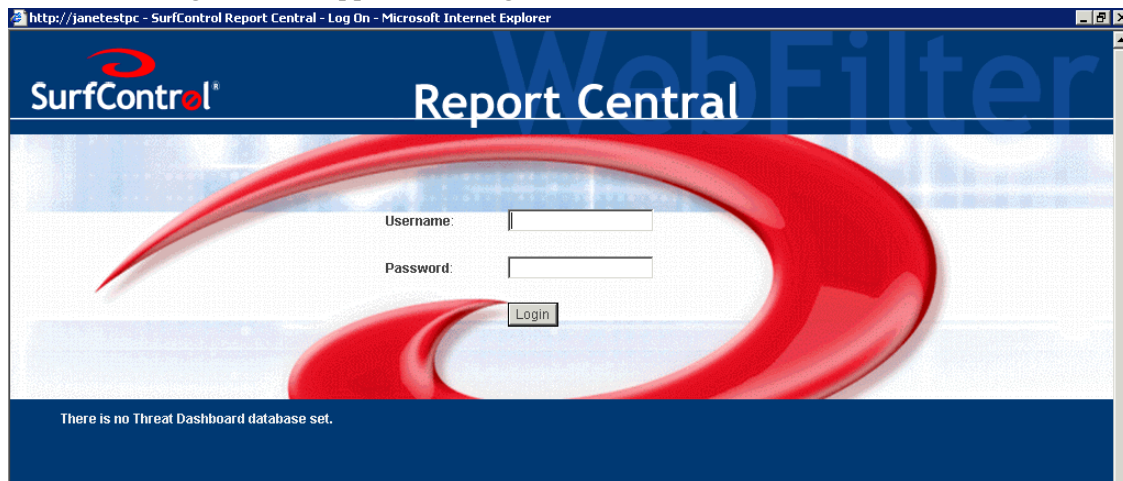
- **Programs > SurfControl Report Central > Web Filter 5.0 Reports**, if you want to connect via HTTP.
- **Programs > SurfControl Report Central > Web Filter 5.0 Reports - Secure Connection**, if you wish to connect via HTTPS.



**Note:** If you want to connect via HTTPS, you will need to select **Yes** to the **Security Alert** dialog box about the security certificate.

---

The first time log on screen appears as in Figure 1-1:



**Figure 1-1** First time SRC log on screen

You will notice that there is no Threat Dashboard database set. You need to edit the update tasks for the database connection established during installation to be used for the Threat Dashboard. See “Update tasks” on page 19 for more details. Once you have enabled the database to be used for your Threat Dashboard, your log on screen will appear as in Figure 1-2.

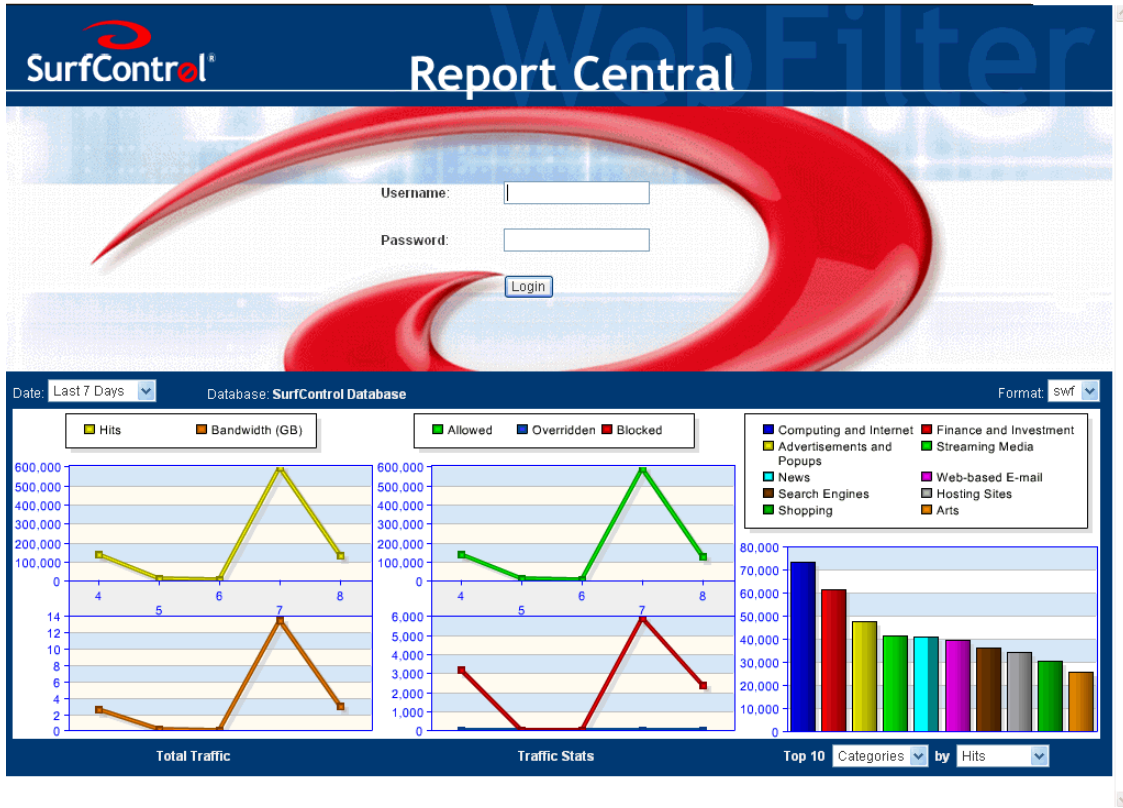


Figure 1-2 Report Central log on screen

## THE THREAT DASHBOARD

The Threat Dashboard (see Figure 1-3) gives an overview of the internet traffic as monitored in your current database, which is shown at the top of the dashboard.

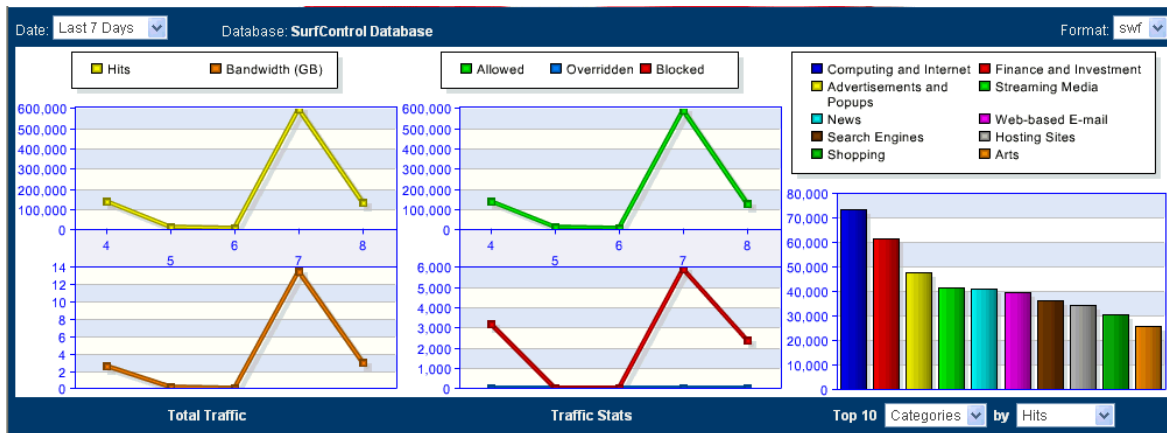


Figure 1-3 Threat Dashboard

The dashboard consists of three graphs.

- **Total Traffic** – shows the number of Web site Hits and the Bandwidth consumption in GBytes.
- **Traffic Stats** – shows the number of Web site requests Allowed, Blocked and Overridden.
- **Top 10** – shows the top ten Web Filter Categories or Protocols by either Hits or Bandwidth.

## FORMATTING THE THREAT DASHBOARD

You can configure the data shown in the dashboard in the following ways:

- **Date** - you can either view data from the previous 7 (the default setting), or 28 days.
- **Format** - you can view the dashboard in the following formats:
  - **.swf** (Macromedia Flash) format. You might be asked to install the free Flash viewer to be able to view the dashboard in this format. This is the default view.
  - **.png** (Portable Network Graphic) format.
  - **.jpg** (Joint Photographic Experts Group) format.

With the png and jpg formats, you can perform the following from the right-click menu:

- Save Picture As...
- E-mail Picture As...
- Print Picture...

This allows you (for example) to include the graphs in reports or to send via an e-mail distribution list.

## Logging on to Report Central

During installation you set up a Reports Administrator level user. This gives you full configuration and reporting rights for the Report Central. Log on using this user's details. You can then set up your other users, if required.

For more information on user rights, see "Setting up Users" on page 14.

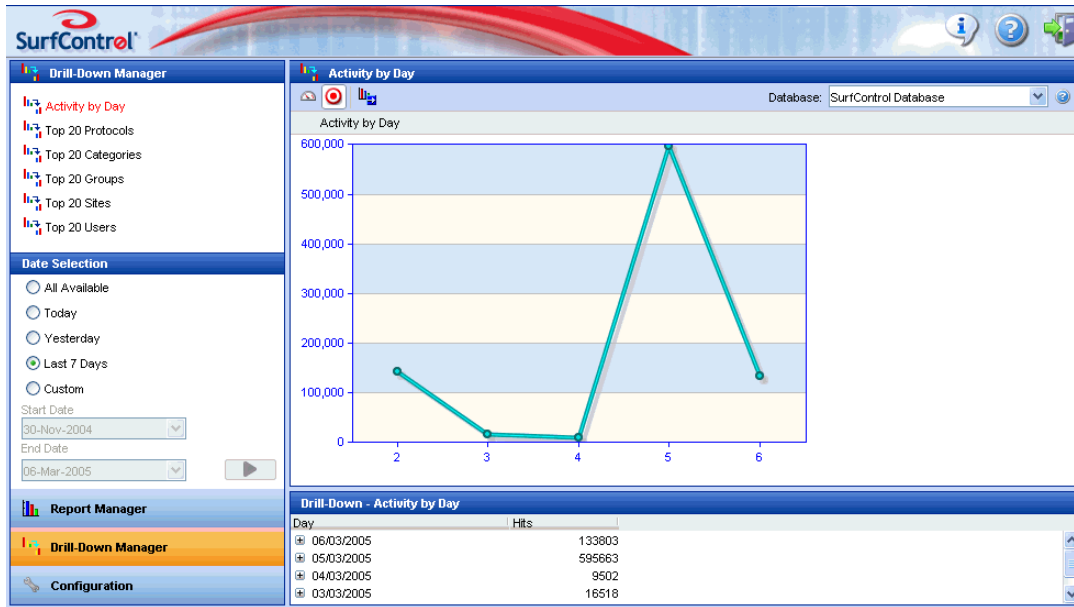


**Warning:** to log on to Report Central you must have ActiveX controls and Plug-ins enabled in Internet Explorer. Check the settings in:  
**Internet Explorer > Tools > Internet Options > Security > Custom Level.**

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## FINDING YOUR WAY AROUND

When you log on to Report Central you will see Figure 1-4 in your browser window:



**Figure 1-4** Report Central Drill-Down Manager

Figure 1-4 shows the initial view of Report Central using the log in details of the Reports Administrator level user created during installation. You can choose whether or not you want some users to view the Drill-Down Manager. See “Specifying Report permissions” on page 16 for more details.

## REPORT CENTRAL MENU

You have up to three menu options in Report Central, as in Figure 1-5:



Figure 1-5 Menu options

## Report Manager

The Report Manager contains the configurable templates for basing your reports on, as in Figure 1-6:

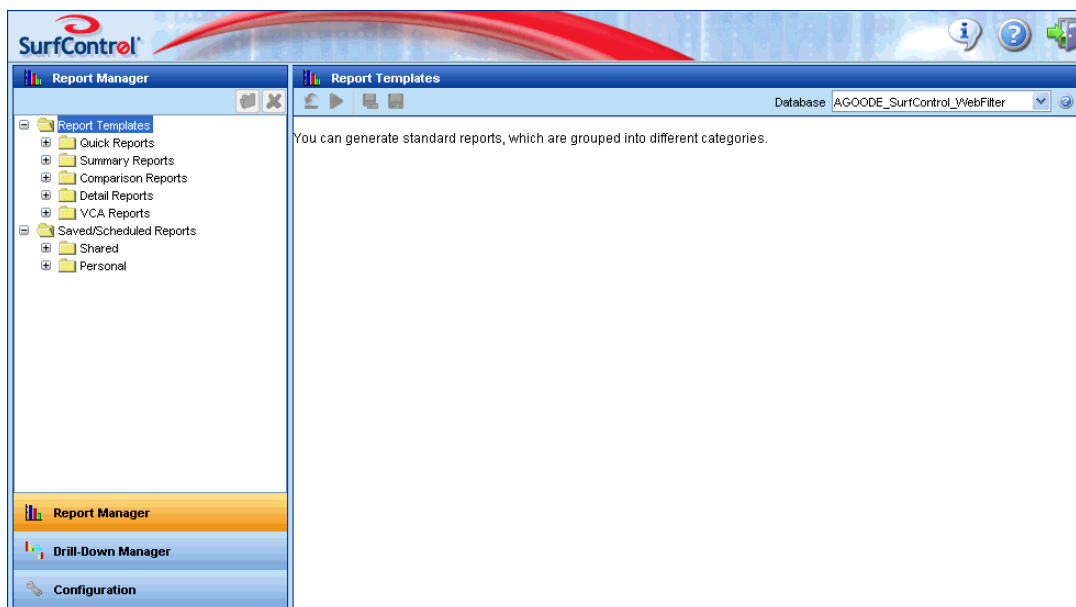
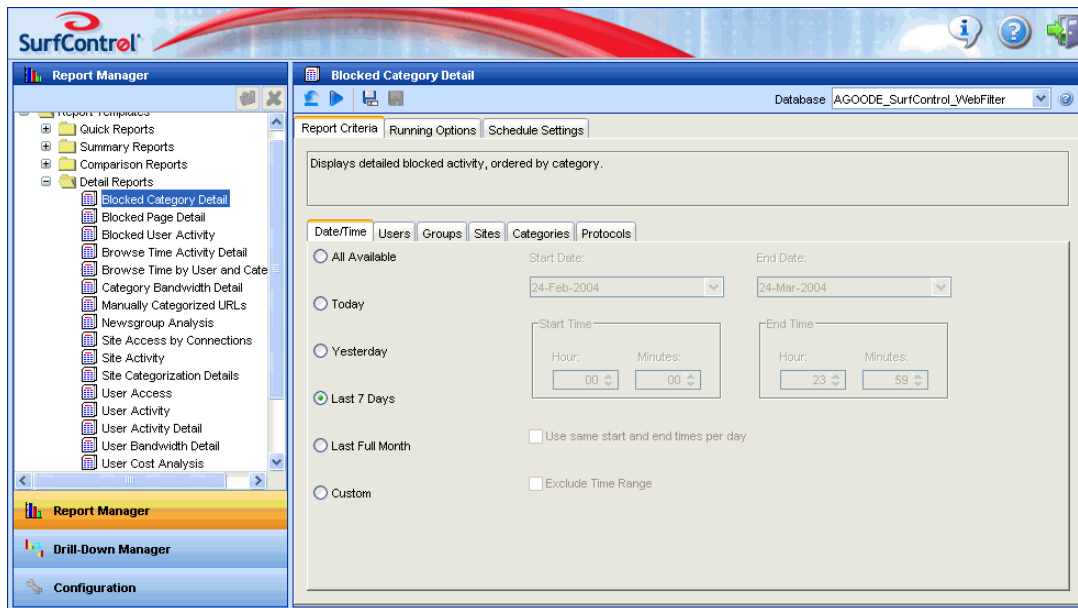


Figure 1-6 Report Manager view



**Note:** Users who don't have permissions to view the Drill-Down Manager will see the Report Manager view by default.

When you select a report, the criteria will display in the right-hand pane, as in Figure 1-7:



**Figure 1-7** Selected Report view

For more information on available reports, and details about setting them up, go to Chapter 4 “Report Manager” on page 37.

## Drill-Down Manager

The Drill Down Manager (see Figure 1-4) permits you to examine how the data is composed of, for a particular day or range of days. For more details about the Drill-Down Manager, go to Chapter 3 “Drill Down Manager” on page 29.

## Configuration

The Configuration menu is where you set up your users and database connections for Report Central. See Chapter 2 “Configuration” on page 11 for more details.

## Help

Report Central comes with a context sensitive help file, with a full text search and index.

# 1

## INTRODUCTION *Getting Started*



## Chapter 2 Configuration

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## INTRODUCTION

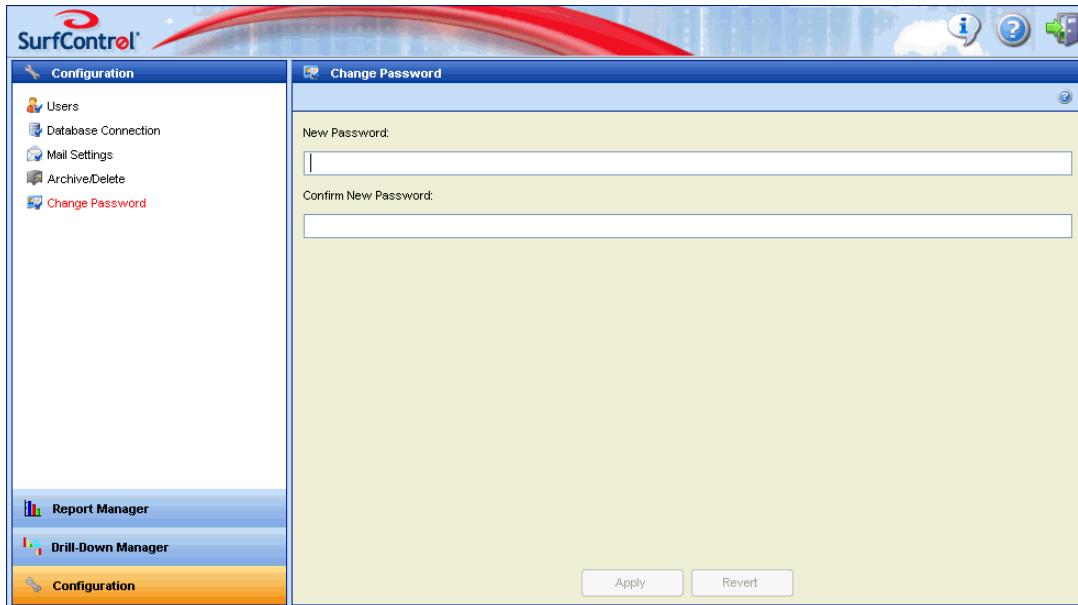
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This chapter explains how to configure SurfControl Report Central. You will be shown the following:

- How to configure user permissions.
- How to set up database connections to run your reports from.
- How to set up mail server connections to enable you to e-mail reports.
- How to perform database housekeeping tasks such as deleting and archiving.

# CONFIGURATION

To configure Report Central, select Configuration as in Figure 2-1:



**Figure 2-1** Configuration menu

There are five options:

- **Users** – add, edit and delete users. See “Setting up Users” on page 14.
- **Database Connection** – create new, edit and delete connections to databases. See “Databases” on page 19.
- **Mail Settings** – set up a connection to your mail server to enable reports to be sent by e-mail. see “Mail Settings” on page 22.
- **Archive / Delete** – manage the reports you have generated. See “Archiving / Deleting reports” on page 23.
- **Change Password** – permits logged in users to change their password. See “Change Password” on page 26.

## SETTING UP USERS

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The first thing you need to do after installing Report Central is set up user accounts. There are three stages to this process.

- 1 Specify login details
- 2 Specify user permissions
- 3 Specify report permissions.

Follow Procedure 2-1 to specify logon details:

### Procedure 2-1: Specifying logon details

Step	Action
1	From the <b>Configuration</b> options, select <b>Users</b> .
2	Click <b>New</b> . The User Configuration dialog box will display.
3	Select the <b>General</b> tab.
4	Enter the following information: <ul style="list-style-type: none"><li>• User Name</li><li>• Password</li><li>• Confirm Password</li></ul>

## SPECIFYING USER PERMISSIONS

When you are creating user accounts, you can set the user permissions as in Table 2-1:

**Table 2-1** User permissions

Permission Setting	Permitted Actions
Reports Administrator	The user can create and edit users and has all Reports Manager privileges.
Reports Manager	A Reports Manager can have some or all of the following privileges: <ul style="list-style-type: none"> <li>• Able to create/modify databases</li> <li>• Able to save reports in the Shared folders</li> <li>• Able to save reports in a Personal folder</li> </ul>
Restricted User	A Restricted User can run reports but cannot change any report criteria. Use this option if you want a user to run only specific reports that have been set up by a Reports Administrator or Manager and saved in a Shared folder.

To set user permissions, follow the steps in Procedure 2-2:

Procedure 2-2: Specifying user permissions	
Step	Action
1	On the User Configuration dialog box, select the <b>General</b> tab.
2	Select the level of access you want the user to have by checking the boxes.

## SPECIFYING REPORT PERMISSIONS

There are three kinds of report; Drill Down, Report Template and Saved/Scheduled.

### Drill Down Reports

Selecting this option gives the user access to the Drill-Down Manager reports. Drill-down reports enable you to investigate the data the report is based upon. See Chapter 3 ‘Drill Down Manager’ on page 29 for more details.

### Report Templates

Report Templates are the pre-configured reports that come installed with Report Central. They are divided into five sub-categories:

- Quick Reports
- Summary Reports
- Comparison Reports
- Detail Reports
- VCA Reports

You can specify whether or not a user has access to a category of reports, or you can specify which individual reports in each category you want users to be able to access. This means that nobody in your organization can view sensitive user information unless they are qualified or authorized to do so.

For a detailed description of each category and report, see Chapter 4 ‘Report Manager’ on page 37

### Saved/Scheduled Reports

Saved/Scheduled reports are defined by the individual Report Central user. These reports can be saved in a Shared folder for your other users with the same permissions to run, or in a Personal folder to be run by themselves only. See “Saving reports” on page 66 for more details.

### Restrict User to Selected Saved/Scheduled Reports Only

If you want a user to only run a report you have previously saved, you can select the report in the Saved/Scheduled folder and then select this checkbox. This user will not have access to any other reports.



**Note: If you set up a Saved/Scheduled report in the future that you want a user to run, you will have to edit the user’s details. See “Changing user details” on page 18 for more details.**

To specify report permissions for a user, follow Procedure 2-3:

Procedure 2-3: Specifying report permissions	
Step	Action
1	On the User Configuration dialog box, select the <b>Reports</b> tab.
2	<p>Choose the reports you want the user to have access to by selecting the check boxes:</p> <ul style="list-style-type: none"> <li>• Drill-Down Reports</li> <li>• Select 'Select All Reports' to give the user access to all reports.</li> <li>• Select a Report Template category to give the user access to all reports in that category.</li> <li>• Click on the category to expand it, and check an individual report to give the user access to that report only.</li> <li>• Select Saved/Scheduled Reports to allow a user to save reports in a Shared or Personal folder.</li> <li>• Select Restrict User to Selected Saved/Scheduled Reports to give the user access to previously saved reports. You can specify which reports the user has access to.</li> </ul>
3	Click <b>Create</b> .

## CHANGING USER DETAILS

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Users with Reports Administrator status can edit user details or delete user accounts. Procedure 2-4 describes how to edit user details.

### Procedure 2-4: Editing User Details

Step	Action
1	From the <b>Configuration</b> options, select <b>Users</b> .
2	Highlight the user in the Existing Users pane.
3	Click <b>Edit</b> . The User Configuration dialog box will appear with the user's existing details.
4	You can change all existing General and Report settings for the user except for the User Name.
5	Click <b>OK</b> to confirm your changes.

Procedure 2-5 describes how to delete a user.

### Procedure 2-5: Deleting a User

Step	Action
1	From the <b>Configuration</b> option, select <b>Users</b> .
1	Highlight the user in the Existing Users pane.
2	Click <b>Delete</b> . A Confirm Delete warning will be displayed.
3	Click <b>Yes</b> to confirm the deletion of the user or <b>No</b> to cancel.

## DATABASES

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The initial **Database** configuration screen shows the following information:

- Existing database connections.

You can also perform the following procedures:

- Add a new connection
- Edit the settings for an existing connection
- Delete connections

### ADDING A NEW DATABASE CONNECTION

To report on a new database, you must first add the database connection details to the list. You can only add a database connection if you are either:

- A Reports Administrator, or
- A Reports Manager with the ‘Able to change/modify databases’ privilege.

Adding a new database is a two part procedure. You must establish a connection to the database and then schedule updating tasks. See Procedure 2-6 for details.

### Update tasks

The Update Tasks tab sets the scheduling, updating and caching settings for the database connection. The following settings can be configured:

- **Enable Scheduling.** Select this option to configure the scheduling options for your new database connection.
- **Scheduler Time Settings.** 01:01 (24 hr clock) is the default Start time. This applies to the database update time and the pre-processing of reports for caching. SurfControl recommend that the database update is carried out when network traffic is quiet. It is important that this update is run for the Drill-Down reports to show accurate information.
- **Update Information for Drill-Down reports.** Select this option to keep the Drill-Down reporting information up to date in between the Scheduled Time updates. This information is then permanently added to the database at the Start time specified. If you clear this option, the other Update Summary Settings options will be unavailable.
- **Time between updates in minutes.** This determines how often the Drill-Down reports are updated in between Scheduled Time updates. 15 minutes is the default setting.
- **Use this database for threat dashboard reports.** Use your new connection for the reports viewed from the log-in screen. This is not selected by default.
- **Update Information for Drill-Down Reports now.** Select this option to perform a complete update for the Drill-Down Reports on confirming the dialog box. After this the update will be run according to the Scheduler Time Settings above.

- **Cache data for quick and summary reports.** All caching options are selected by default. See “Caching options” on page 20 for more details.

### Caching options

Report Central pre-processes Quick and Summary Reports and caches the results in the database. This allows faster generation of these reports. Caching is available for these time periods:

- Yesterday
- Last 7 Days
- Last Full Month

Caching is enabled by default for all the time periods listed. To disable caching for one or more time period, clear the appropriate option.

The cached reports are run using the default criteria for each report. See “Specifying report criteria” on page 52 for more details on criteria.

The following options for the cached version of the reports can be altered:

- Cost criteria
- Top N values

If a user runs one of the cached reports having changed any other option or criteria (Users, Sites etc.), the report will be generated without using the cached data. See “Specifying report criteria” on page 52 for more details on criteria.

Procedure 2-6: Adding a new database connection	
Step	Action
1	From the <b>Configuration</b> options, select <b>Database Connections</b> .
1	Click <b>New...</b>
2	On the <b>Connectivity</b> tab enter the following information: <ul style="list-style-type: none"> <li>• A <b>Display Name</b> for the database. This will be added to the connections list in the configuration screen.</li> <li>• The name of the <b>Server</b>.</li> </ul>
3	Select the Authentication method. If you choose SQL authentication, enter the user name and password of an account with administrator access to the server. <i>SurfControl recommends using Windows authentication. If you choose Windows Authentication, both the SurfControl server and the SQL server must be members of the same domain.</i>
4	From the drop-down list box, select the database you want to connect to.
5	From the <b>Update Tasks</b> tab, Select <b>Enable Scheduling</b> .
6	Configure the update and cache settings.
7	Click <b>Create</b> .

## MAIL SETTINGS

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You can e-mail reports to other users. To be able to do this, you need to specify a mail server. Follow Procedure 2-7.

### Procedure 2-7: Specifying a Mail Server

Step	Action
1	From the <b>Configuration</b> option, select <b>Mail Settings</b> .
2	In the Hostname field, enter the server name of the mail server you want to use to distribute reports, for example myserver@mycompany.com
3	In the Port field, enter the number of the port you want to use to send outbound e-mail. This is usually port 25.
4	In the Senders E-mail Address field, enter the e-mail address you want to send reports from, for example reporting@reportcentral.com.
5	Click <b>Apply</b> to confirm your changes.

## ARCHIVING / DELETING REPORTS

---

You can specify how Report Central deals with reports that are no longer current. Once you have enabled archiving or deletion (Procedure 2-8), use the Archive / Delete options to specify:

- Which reports are deleted or archived.
- When deletion or archiving takes place.

### ENABLING REPORT ARCHIVING / DELETION

In order to delete or archive reports you must first enable the archive and delete facility:

#### Procedure 2-8: Enabling Report Archiving / Deletion

Step	Action
1	From the <b>Configuration</b> options, select <b>Archive / Delete</b> .
2	Select <b>Enable Deletion and Archiving</b> . The Delete and Archive options will become available.
3	Select whether you want to <b>Delete</b> reports or <b>Archive</b> them. The settings for the options you have chosen will become available.  <b>Note:</b> <i>By default Deletion and Archiving is disabled. When you enable it, the Delete Reports option is selected by default.</i>

You can now set your archive / delete options by following procedures 2-9 or 2-10 on the following pages.

## DELETING REPORTS

Once you have chosen to delete reports, use the Delete Options tab to specify which reports are deleted, and when.

Procedure 2-9: Deleting reports	
Step	Action
<b>Specifying which reports are deleted</b>	
1	From the <b>Configuration</b> options, select <b>Archive / Delete</b> .
2	Make sure <b>Enable Deletion and Archiving</b> and <b>Delete Reports</b> options are selected.
3	Select the <b>Delete Options</b> tab.
4	To choose which reports are deleted, select one of the following: <ul style="list-style-type: none"> <li>• All (the default setting)</li> <li>• Before today</li> <li>• Older than last 7 days</li> <li>• Older than last full month</li> </ul>
<b>Specifying the date and time you want reports to be deleted</b>	
5	Select the <b>Date / Time</b> tab.
6	In the <b>Time of Day</b> area, specify a time of day (using the 24hr clock) to delete your reports.
7	If you want the selected reports to be deleted on a certain day or days of the week, select <b>Every</b> , and use the checkbox to specify the days you want. If you want the reports to be deleted every day, select all the check boxes.
8	If you want the selected reports to be deleted on a certain day in the month, select <b>Monthly</b> and use the <b>Day</b> field to specify which day of the month you want. Alternatively, if you want the reports to be deleted on the last day of each month, select <b>End of Month</b> .
9	Click <b>Apply</b> .

## ARCHIVING REPORTS

Once you have chosen to archive reports, use the Archive Options tab to specify: which reports are archived, and when. Follow Procedure 2-10 to choose reports for archiving.



**Note:** Reports are archived individually, in their originally created format.

### Procedure 2-10: Choosing which reports are archived

Step	Action
1	From the <b>Configuration</b> options, select <b>Archive / Delete</b> .
2	Make sure <b>Enable Deletion and Archiving</b> and <b>Archive Reports</b> options are selected.
3	Select the <b>Archive Options</b> tab.
4	To choose which reports are archived, select one of the following: <ul style="list-style-type: none"> <li>• All (the default setting)</li> <li>• Before today</li> <li>• Older than last 7 days</li> <li>• Older than last full month</li> </ul>
5	In the Archive Location field, specify a folder where you want archived reports to be stored.
6	Select the Date / Time tab.
7	In the Time of Day area, specify a time of day (using the 24hr clock) to archive your reports.
8	If you want the selected reports to be archived on a certain day or days of the week, select <b>Every</b> , and use the checkbox to specify the days you want. If you want the reports to be archived every day, select all the checkboxes.
9	If you want the selected reports to be archived on a certain day in the month, select <b>Monthly</b> and use the <b>Day</b> field to specify which day of the month you want. Alternatively, if you want the reports to be archived on the last day of each month, select <b>End of Month</b> .
10	Click <b>Apply</b> .

## CHANGE PASSWORD

Any user can change their own password from this option. If your account is a Reports Administrator account, you can also change the password of other users from the **Users > Edit** option. See “Changing user details” on page 18 for more details.

## PORT NUMBER

If you need to change the port number that Report Central listens on (default of 8888) following installation, follow Procedure 2-11:

### Procedure 2-11: Changing the default SRC port number

Step	Action
1	Stop the Tomcat server.
2	Locate the <code>server.xml</code> file. In a default installation it can be found in: C:\Program Files\SurfControl\Report Central\Tomcat\Conf\
3	Open the file in a text editor
4	Change the port setting (8888) in the <code>Connector port="8888"</code> line if you are connecting via HTTP. Change the port setting (8443) in the <code>Connector port="8443"</code> line if you are connecting via HTTPS.
5	Save the <code>server.xml</code> file.
6	In the Registry, change the value of the following key to the same as in <code>server.xml</code> : HKEY_LOCAL_MACHINE\SOFTWARE\SurfControl\Report Central\WebFilter50\Default\Web Server Port
7	Start the Tomcat server.
8	From the <b>Program Files &gt; SurfControl Report Central</b> menu options, Right-click and select <b>Properties</b> for your connection type.
9	You need to edit the address to reflect the new port number. I.e. change the 8888 or 8443 part of the URL: <code>http://localhost:8888/WebFilter50/Html/startup.html</code> (for HTTP) <code>https://localhost:8443/WebFilter50/Html/startup.html</code> (for HTTPS)
10	<b>Note:</b> <i>you will need to re-distribute the Client Shortcut to your remote users following this change.</i>

## SCHEDULER LOG

---

A log file (`Scheduler.log`) is created for all scheduled events, apart from the refreshing of the summary data in between scheduled updates (unless there was an error preventing the refresh). In a default installation the log file can be found in:

`C:\Program Files\SurfControl\Report Central\Tomcat\webapps\WebFilter50`



## Chapter 3

## Drill Down Manager

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## INTRODUCTION

Drill down reports enable you to investigate the data the report is based upon. Drill down report data is updated on a daily basis. The timing of these updates can be scheduled in the Update tasks tab from the **Configuration > Database** settings. See “Update tasks” on page 19 for more details.

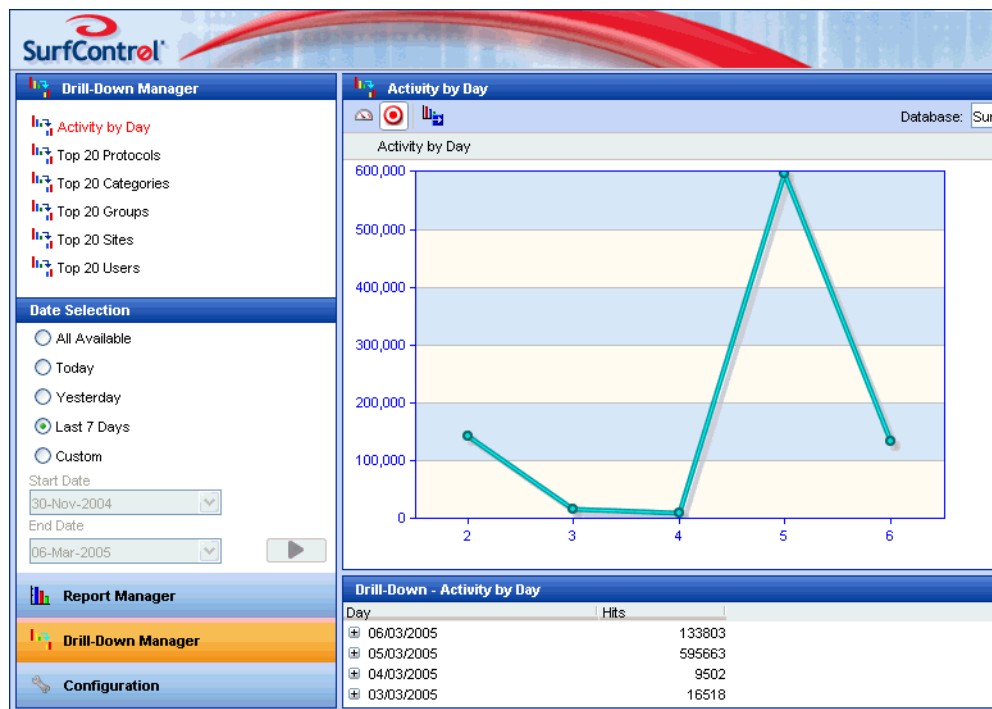


**Note:** you need to have the correct user permissions to see the Drill Down Reporting option. See “Specifying user permissions” on page 15 for more details.

## THE DRILL DOWN REPORTS SCREEN

Figure 3-1 shows the initial drill down screen. The screen is split into four parts:

- Drill Down Reports
- Date Selection
- Report View
- Drill Down Data



**Figure 3-1** Drill Down Reports initial view

## DRILL DOWN REPORTS

The Drill Down Reports panel shows the list of available reports to view. The following reports can be shown:

- Activity by Day (the default report view)
- Top 20 Protocols
- Top 20 Categories
- Top 20 Groups
- Top 20 Sites
- Top 20 Users



**Figure 3-2** Available Drill Down Reports

The report currently being shown is highlighted in red text.

## DATE SELECTION

The Date Selection panel as in Figure 3-3 allows you to select specific dates for the report view. You have the following options:

- All Available
- Today
- Yesterday
- Last 7 Days (the default view)
- Custom

**Figure 3-3** Date Selection section

When you select Custom, the Start and End Date Drop down lists become active, enabling you to specify a range of dates from a Calendar as in Figure 3-4.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<del>1</del>	<del>2</del>	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Today: 10/02/05      None

**Figure 3-4** Date selection calendar

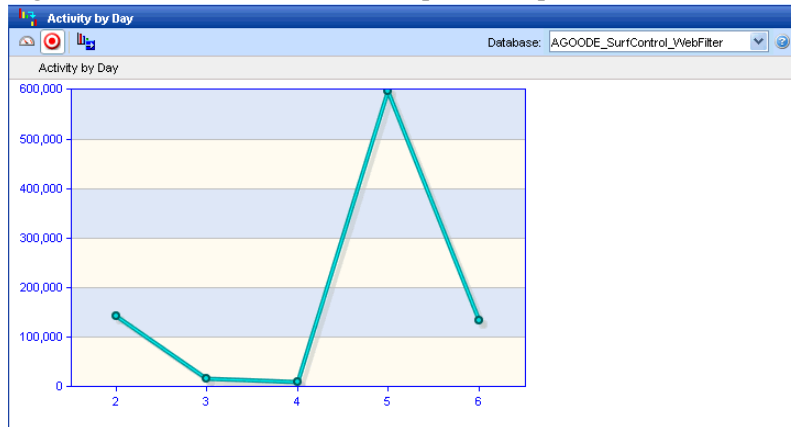


**Note:** Any dates with a red cross through them are not available for selection

Once you have specified a Start and End Date, click **Go** .

## DRILL DOWN REPORT VIEW

Figure 3-5 shows the Drill Down Report view panel.

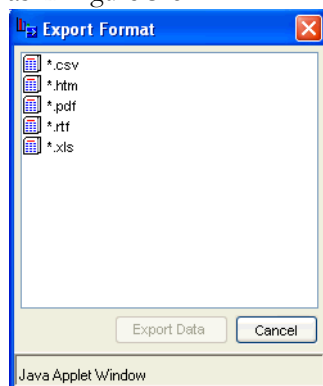


**Figure 3-5** Report view panel

The selected Drill Down Report can be viewed in 2 ways:

- Hits view (default)
- Bandwidth view

You can also Export the report data by clicking and selecting a format from the Export Format dialog box as in Figure 3-6.



**Figure 3-6** Export Format dialog box

The available formats are:

- **CSV** – for use by a spreadsheet program such as MS Excel
- **HTML** – for viewing via a Web browser
- **PDF** – for viewing via a portable document format viewer such as Adobe Acrobat.
- **RTF** – for use by a word processor (MS Word recommended).
- **XLS** – MS Excel format (version 97 or later).

The Database drop down list box allows you to choose any of the other database connections configured in Report Central. see “Databases” on page 19., for more details.

## THE DRILL DOWN DATA PANEL

Figure 3-7 shows the Drill Down data panel. The initial view shows a collapsed view of the data the report is comprised of.



**Note: The data displayed varies according to the report selected and whether you are viewing by Hits or Bandwidth.**

Day	Hits
+ 04/02/05	9502
+ 05/02/05	595663
+ 06/02/05	133803

Figure 3-7 Drill Down data panel

### Navigating the Drill Down Data

When you expand the drill down data (Day in Figure 3-7) you can view the data for that category split into sub categories as in Figure 3-8.

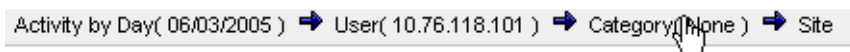
Day	Hits
- 05/02/05	595663
├─ <a href="#">Users</a>	
├─ <a href="#">Groups</a>	
└─ <a href="#">Categories</a>	

Figure 3-8 Expanded data

The following drill down data is available, depending on which report you are viewing. These appear as hyperlinks.

- Users
- Groups
- Categories
- Sites
- Protocols
- Action

Click on the data you want to investigate further. The graph is redrawn to show the data selected. To show you where you have drilled down to, a breadcrumb navigation system is used above the graph. Figure 3-9 shows an example of the breadcrumb navigation. Each step in the navigation is a hyperlink, which enables you to go back to a previous step in the drill down process.



**Figure 3-9** Breadcrumb navigation



**DRILL DOWN MANAGER**  
*The Drill Down Reports screen*



## Chapter 4 Report Manager

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## INTRODUCTION

---

This chapter explains how to generate reports from the Report Manager.

There are two types of report:

- Report Templates– reports generated using pre-set criteria.
- Shared/Scheduled – reports generated using criteria you have previously entered and saved. This means you can generate the same report many times without having to re-enter the criteria.

## REPORT TEMPLATES

Standard Reports are split into five categories:

- Quick Reports
- Summary Reports
- Comparison Reports
- Detail Reports
- VCA Reports

# QUICK REPORTS

Table 4-1 Quick Reports

Report name	Type	Data	Ordered by
Blocked Category Summary	Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Category</li> <li>No of Blocked Connections</li> </ul>	Connections
Top 10 Categories	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Category</li> <li>No of Connections</li> </ul>	Connections
Top 10 Groups	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Group</li> <li>No of Connections</li> </ul>	Connections
Top 10 Groups by Cost	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Browse Sensitivity</li> <li>Cost per hour</li> <li>Group</li> <li>Cost</li> </ul>	Cost
Top 10 pages	Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>No of Connections</li> <li>Page</li> </ul>	Connections
Top 10 Protocols	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Protocol</li> <li>No of Connections</li> </ul>	Connections
Top 10 Sites	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Site</li> <li>Connections</li> </ul>	Connections
Top 10 SMTP E-mail Receivers by Size	Bar Chart	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Receiver</li> <li>Bytes Received</li> </ul>	Bytes Received
Top 10 SMTP E-mail Senders by Size	Bar Chart	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Sender</li> <li>Bytes Sent</li> </ul>	Bytes Sent
Top 10 Users by Browse Times	Bar Chart & Table	<ul style="list-style-type: none"> <li>Date Range</li> <li>Date Run</li> <li>Browse Sensitivity</li> <li>User</li> <li>Hours</li> </ul>	Browse Time

(Sheet 1 of 2)

**Table 4-1** Quick Reports (Continued)

Report name	Type	Data	Ordered by
Top 10 Users by Connections	Bar Chart	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> </ul>	Connections
Top 10 Users by Connections showing Categories	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> <li>• Category</li> </ul>	Connections
Top 10 Users by Cost	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Browse Sensitivity</li> <li>• Cost per hour</li> <li>• User</li> <li>• Cost</li> </ul>	Cost
Top 10 Workstations by Connections	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Workstation</li> <li>• No of Connections</li> </ul> <p><b>Note:</b> This report is not available in the Privacy Edition of Web Filter</p>	Connections

**(Sheet 2 of 2)**

# SUMMARY REPORTS

Table 4-2 Summary Reports

Report name	Type	Data	Ordered by
Top N Categories by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• No of Connections</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> </ul>	Connections
Top N Groups by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Groups</li> <li>• No of Connections</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> </ul>	Connections
Top N Groups by Cost	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Browse Sensitivity</li> <li>• Cost per hour</li> <li>• Groups</li> <li>• Total Cost</li> <li>• Total Browse Time</li> </ul>	Total Cost
Top N Groups showing Category by User	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Group</li> <li>• User</li> <li>• No of Connections</li> <li>• Category</li> </ul>	Category within group
Top N Protocols	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• No of Connections</li> <li>• Protocol</li> <li>• Data Sent/Received</li> </ul>	Connections
Top N sites by Bandwidth	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• No of Connections</li> <li>• Site</li> <li>• Total Data Sent/Received</li> </ul>	Total Data
Top N sites by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Site</li> <li>• No of Connections</li> <li>• Data Sent</li> <li>• Data Received</li> </ul>	Connections
Top N SMTP E-mail Receivers by Quantity	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Recipient</li> <li>• E-mails Receiver</li> </ul>	E-mails received

(Sheet 1 of 2)

**Table 4-2** Summary Reports (Continued)

Report name	Type	Data	Ordered by
Top N SMTP E-mail Receivers by Size	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Recipient</li> <li>• Total Size</li> <li>• Receiver</li> </ul>	Bytes Received
Top N SMTP E-mail Senders by Quantity	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Sender</li> <li>• E-mails Sent</li> </ul>	E-mails Sent
Top N SMTP E-mail Senders by Size	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Total Size</li> <li>• Sender?</li> </ul>	Total Size
Top N Users by Browse Times	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• Total Browse Time</li> </ul>	Total Browse Time
Top N Users by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> <li>• Data Sent</li> <li>• Data Received</li> </ul>	Connections
Top N Users by Connections showing Categories	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> <li>• Category</li> </ul>	Connections
Top N Users by Connections showing Protocols	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> <li>• Protocol</li> </ul>	Connections
Top N Users by Cost	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Browse Sensitivity</li> <li>• Cost per hour</li> <li>• User</li> <li>• Total Cost</li> <li>• Total Browse Time</li> </ul>	Cost
Top N Workstations by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Workstation</li> <li>• No of Connections</li> <li>• Data Sent</li> <li>• Data Received</li> </ul> <p><b>Note:</b> This report is not available in the Privacy Edition of Web Filter</p>	Connections

**(Sheet 2 of 2)**

# COMPARISON REPORTS

Table 4-3 Comparison Reports

Report name	Type	Data	Ordered by
Bandwidth by Category	Bar Chart	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• Data Sent</li> <li>• Data Received</li> </ul>	Data Sent & Data Received
Bandwidth by Date	Bar Chart	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Date</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> </ul>	Date
Bandwidth by Group	Bar Chart	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Group</li> <li>• Data Sent</li> <li>• Data Received</li> </ul>	Data
Bandwidth by Hour	Bar Chart	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Date</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> </ul>	Hour
Category by Connections and Group	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• Group</li> <li>• No of Connections</li> </ul>	Connections
Category Time Analysis	Line Graph	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• No of Connections</li> <li>• Time</li> </ul>	N/A
Connections by Date	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Date</li> <li>• No of Connections</li> </ul>	Date
Connections by Day of Week	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Day</li> <li>• No of Connections</li> </ul>	Day
Connection by Hour of Day	Bar Chart & Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Hour</li> <li>• No of Connections</li> </ul>	Hour
Group Time Analysis	Line Graph	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Group</li> <li>• No of Connections</li> <li>• Time</li> </ul>	N/A

(Sheet 1 of 2)

**Table 4-3** Comparison Reports (Continued)

Report name	Type	Data	Ordered by
Groups by Category and Connections	Table	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• Group</li><li>• Category</li><li>• No of Connections</li><li>• Time</li></ul>	Connections
Protocol Data Analysis	Table	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• Protocol</li><li>• User</li><li>• Bytes Sent</li><li>• Bytes Received</li><li>• First Access</li><li>• Last Access</li></ul>	Protocol?
Protocol Time Analysis	Line Graph	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• Protocol</li><li>• Time</li><li>• No of Connections</li></ul>	N/A

**(Sheet 2 of 2)**

# DETAIL REPORTS

Table 4-4 Detail Reports

Report name	Type	Data	Ordered by
Blocked Category Detail	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• Site</li> <li>• Page</li> <li>• User</li> <li>• No of Connections</li> </ul>	Category
Blocked Page Detail	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Site</li> <li>• Page</li> <li>• User</li> <li>• No of Connections</li> </ul>	Category
Blocked User Activity	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• Site</li> <li>• Category</li> <li>• Access Time</li> </ul>	User
Browse Time Activity Detail	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Browse Sensitivity</li> <li>• Browse Allowance</li> <li>• User</li> <li>• Date</li> <li>• From</li> <li>• To</li> <li>• Duration</li> </ul>	User
Browse Time by User and Category		<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Browse Sensitivity</li> <li>• User</li> <li>• Category</li> <li>• Duration</li> </ul>	User
Category Bandwidth Detail	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> </ul>	Category
Manually Categorized URLs	Table	<ul style="list-style-type: none"> <li>• Date Run</li> <li>• Category</li> <li>• Site</li> <li>• Page</li> <li>• Last Access</li> </ul>	Category

(Sheet 1 of 3)

**Table 4-4** Detail Reports (Continued)

Report name	Type	Data	Ordered by
Newsgroup Analysis	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• Date</li> <li>• Time</li> <li>• Page</li> <li>• Size</li> </ul>	User
Site Access by Connections	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Site</li> <li>• IP Address</li> <li>• No of Connections</li> </ul>	Connections
Site Activity	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Site</li> <li>• Activity</li> <li>• User</li> <li>• Protocol</li> <li>• Bytes Sent</li> <li>• Bytes Received</li> <li>• Date/Time of Connection</li> </ul>	Site
Site Categorization Details	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• Category</li> <li>• Site</li> <li>• Page</li> <li>• No of Connections</li> </ul>	Category
User Access	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• No of Connections</li> <li>• First Access</li> <li>• Last Access</li> </ul>	Connections
User Activity	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• Category</li> <li>• Site</li> <li>• Last Access</li> <li>• Category</li> <li>• Date</li> </ul>	User
User Activity Detail	Table	<ul style="list-style-type: none"> <li>• Date Range</li> <li>• Date Run</li> <li>• User</li> <li>• Site</li> <li>• Activity</li> <li>• Category</li> <li>• Date</li> </ul>	User

**(Sheet 2 of 3)**

Table 4-4 Detail Reports (Continued)

Report name	Type	Data	Ordered by
User Bandwidth Detail	Table	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• User</li><li>• Bytes Sent</li><li>• Bytes Received</li></ul>	User
User Cost Analysis	Table	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• Browse Sensitivity</li><li>• Cost per hour</li><li>• User</li><li>• Duration</li><li>• Cost</li><li>• First Access</li><li>• Last Access</li></ul>	User

(Sheet 3 of 3)

## VCA REPORTS

---

Table 4-5 VCA Reports

Report name	Type	Data	Ordered by
Virtual Control Agents by Category	Table	<ul style="list-style-type: none"><li>• Date Range</li><li>• Date Run</li><li>• Category</li><li>• Number of categorized sites</li><li>• Percentage of categorized sites</li></ul>	Category

## HOW BROWSE SENSITIVITY IS CALCULATED FOR REPORTS

Report Central splits a day into segments. By default this is set to 3 minutes. Your Internet connections within these segments are then calculated to give a Browse Sensitivity. Reports that use Browse Sensitivity data have an Options tab where you can alter this setting. See “Options” on page 60 for more details.

### HOW IT WORKS

Browse sensitivity is calculated in the following ways.

#### Single Connection

A single connection to a Web site (using the default setting) is calculated as having a browse time of 3 minutes. This is even if you connect to the site for more or less than 3 minutes.



**Note: Reports that use Browse Sensitivity data also show when the duration of a connection reaches a threshold limit. The default is 5 minutes. See “Options” on page 60 for more details.**

#### Multiple Connections

Multiple connections have their browse sensitivity calculated in the following way, as in Table 4-6.

**Table 4-6** Multiple Connections and Browse Sensitivity

Site	From	To	Calculated Browse Time
site1.com	09:57	10:00	3 minutes
site2.com	09:57	10:00	
site3.com	10:00	10:03	3 minutes
<b>Total Browse Time</b>			<b>6 minutes</b>

In the 3 minute segment of 09:57 to 10:00, you make two connections to different sites. This gives a browse sensitivity of 3 minutes because the number of sites aren’t important in the calculation, only the amount of time you spend on the Internet within any one segment.

When you make another connection in the next 3 minute period (10:00 to 10:03), this counts as another connection, and is therefore calculated of having a browse time of 3 minutes, giving a total of 6 minutes.

## Browse Time by User and Category

Browse sensitivity is calculated slightly differently in this report. Table 4-7 shows how this is calculated.

**Table 4-7** Browse Time by User and Category

Site	Category	From	To	Calculated Browse Time
site1.com	1	09:57	10:00	3 minutes
site2.com	2	09:57	10:00	3 minutes
site3.com	1	10:00	10:03	3 minutes
<b>Total Browse Time</b>				<b>9 minutes</b>

You browse to two sites within a single 3 minute segment. Site1.com is in one category, site2.com is in another. To report by category these are counted as two separate connections and are given a separate browse time. If these two sites were in the same category, the browse sensitivity would be the same as in Table 4-7.

When you connect to site3.com in the next time segment, this is counted as another connection and given a browse time of 3 minutes. This can give different totals than other reports using Browse Sensitivity for the same time period.

## SETTING UP REPORTS

---

There are four stages to setting up a report:

- 1 Select the report you want to run
- 2 Specify report criteria
- 3 Specify running options
- 4 Specify scheduling options

### SELECTING A REPORT

From the Report Manager options, select a report from one of the categories.. The criteria for that report will display in the right-hand pane.



**Warning:** The date on the computer where Report Central is installed must be the same as on the SQL server, otherwise the time and date may not be reported accurately.

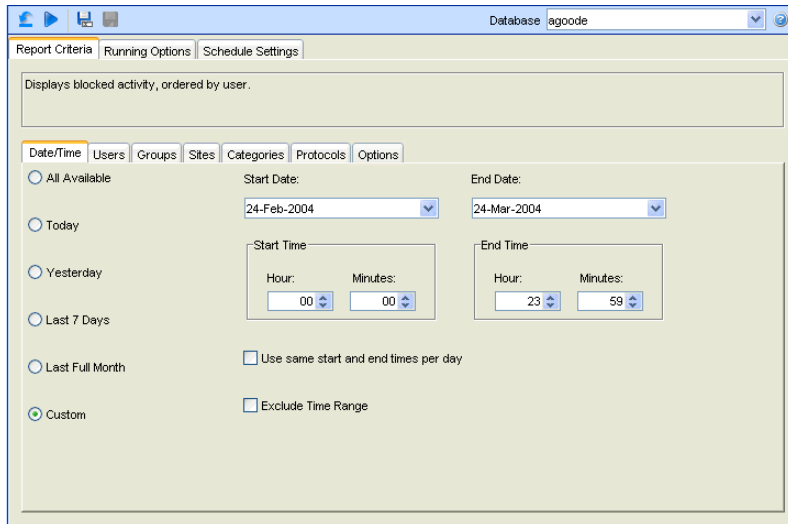
When you select a report, SurfControl Report Central retrieves the Time and Date information from the database. If there is a problem connecting to your database you will receive an error message detailing the problem.

You should check the following:

- Report Central is connecting to a valid database (**Database Connections** in **Configuration**).
- The server is running correctly (**SQL Service Manager**).

## SPECIFYING REPORT CRITERIA




You can specify the following report criteria as in Figure 4-1, depending on the type of report you are generating, and your user permissions:



**Figure 4-1** Report Criteria

- Time / Date – See page 53.
- Users – See page 55.
- Groups – See page 56.
- Sites – See page 57.
- Categories – See page 58.
- Protocols – See page 59.
- Options – See page 60.
- Database – See page 61.

You also have the following options from this screen:

- Use Default Report Settings – 
- Run Report – 
- Save As – 
- Select which database you want to run your reports from, using the drop-down list box.

## Time / Date

Table 4-8 shows the Time / Date criteria

**Table 4-8** Time / Date criteria

All Available	Report on all available data stored on the database.
Today	Report on all data logged to the database today.
Yesterday	Report on all data logged to the database yesterday (between 00hrs and 24hrs).
Last 7 Days	Report on all data logged to the database in the last seven days. (the default setting).
Last full month	Report on all data logged to the database in the last full month.
Custom	Report on all data logged to the database in the time period you specify. See procedure Procedure 4-1.

### Specifying a custom time period for reports.

You can report on any time period by using the Custom option as in Procedure 4-1:

#### Procedure 4-1: Specifying a custom time period for reports

Step	Action
1	Select a <b>Start Date</b> by clicking the drop-down list box and selecting a day from the calendar. <b>Note:</b> <i>Any dates with a red cross through them are not available for selection.</i>
2	Select a <b>End Date</b> by clicking the drop-down list box and selecting a day from the calendar. <b>Any dates with a red cross through them are not available for selection.</b>
3	Specify a Start Time (in 24 hr clock).
4	Specify an End Time (in 24 hr clock).
5	If you want the report to take data from the same time period each day, select <b>Use same start and end times each day</b> . See Table 4-8 for an explanation of this feature.
6	If you want the report to take data from outside the time period you specify, select <b>Exclude Time Range</b> . See Table 4-10 for an explanation of this feature.

## Use same start and end times per day

You can specify that the report uses data from the same time frame each day.

**Table 4-9** Use same start and end times per day checkbox

Checkbox	What happens	Example
Cleared	SurfControl Report Central will use report data from the entire date range you specify, beginning at the start time on the start date and ending at the end time on the end date.	Between 9am on day 1 and 5pm on day 3.
Selected	SurfControl Report Central will use report data from the time period you specify, for each day between the start and end date.	between 9am and 5pm on day 1, 9am and 5pm on day 2, etc.

## Exclude Time Range

You can use the **Exclude Time Range** check box independently of the **Use same start and end times per day** check box.

**Table 4-10** Exclude Time Range checkbox

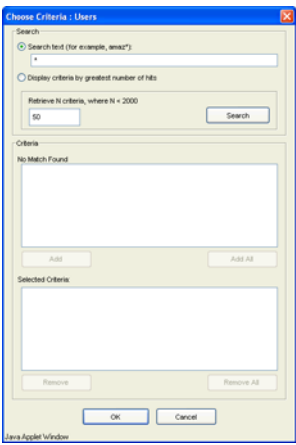
Checkbox	What happens	Example
Cleared	The report will use data from the time period you specify.	Between 9am and 5pm on day 1.
Selected	report will use any data excluded by the Use same start and end times per day options.	Midnight until 9am and 5pm till 11:59pm on day 1.

## Users

By default, all users monitored by SurfControl Web Filter are included in reports and all new users are automatically included. Use the Users tab to only include selected users or to exclude users you don't want to report on. Users tab

## Specifying users in a report

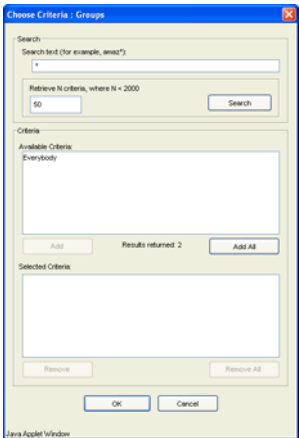
### Procedure 4-2: Include or Exclude users in a report

Step	Action
1	Select the <b>Users</b> tab.
2	<p>By default, all users are included in the report. Select Include selected items or Exclude selected items depending whether you wish to include only selected users or exclude selected users from your reports. A Choose Criteria: Users dialog box will appear.</p> <p><b>Note:</b> <i>if you already have users in the Selected Criteria list on the Users tab, you need to click Add to display the Choose Criteria dialog box.</i></p> 
3	<p>You have 3 methods for selecting users:</p> <ul style="list-style-type: none"> <li>• Search for a user by entering search text. Wildcards can be used. Click <b>Search</b>. The search results will be displayed in the Available Criteria List.</li> <li>• If you wish to filter users based on the number of hits (the number of times a user has accessed an Internet site), select <b>Display criteria by greatest number of hits</b>. Enter the number of search requests you want to have returned (between 1 to 2000). Click <b>Search</b>. The users will be displayed in descending order of hits in the Available Criteria List.</li> <li>• Select users by scrolling through the Available Criteria List. You can select both continuous and non-continuous ranges of users. Click <b>Add</b>. The selected users will appear in the Selected Criteria field.</li> </ul> <p><b>Note:</b> <i>restricted users cannot change User criteria.</i></p> <p><b>Note:</b> <i>To increase the maximum number of hits to greater than 2000, consult Knowledge Base article 1596 from <a href="http://kb.surfcontrol.com">http://kb.surfcontrol.com</a></i></p>
4	Click <b>OK</b> to confirm the selection.

## Groups

By default, all SurfControl Web Filter defined groups are included in reports and all new groups are automatically included. This tab can be used to only include selected groups or to exclude selected groups for your reports.

### Procedure 4-3: Specifying groups in a report

Step	Action	
1	Select the <b>Groups</b> tab.	
2	<p>By default, all groups are included in the report. Select Include selected items or Exclude selected items depending whether you wish to include only selected groups or exclude selected groups from your reports. A Choose Criteria: Groups dialog box will appear.</p> <p><b>Note:</b> <i>if you already have groups in the Selected Criteria list on the Groups tab, you need to click Add to display the Choose Criteria dialog box.</i></p>	
3	<p>You have 2 methods for selecting groups:</p> <ul style="list-style-type: none"> <li>• Search for a group by entering search text. Wildcards can be used. Click <b>Search</b>. The search results will be displayed in the Available Criteria List.</li> <li>• Select groups by scrolling through the Available Criteria List. You can select both continuous and non-continuous ranges of groups. Click <b>Add</b>. The selected groups will appear in the Selected Criteria field.</li> </ul> <p><b>Note:</b> <i>restricted users cannot change the criteria for Groups.</i></p>	
4	Click <b>OK</b> to confirm the selection.	

## Sites

By default, all Web sites logged by the SurfControl Web Filter database are included in reports and all new sites are automatically included. This tab can be used to only include selected sites or to exclude selected sites for your reports.

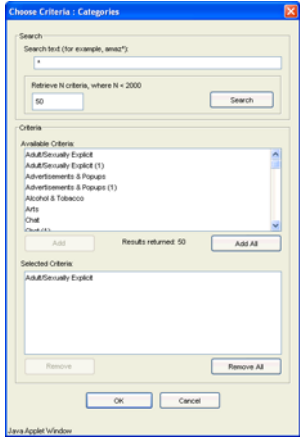
### Procedure 4-4: Specifying sites criteria

Step	Action	
1	Select the <b>Sites</b> tab.	
2	<p>By default, all sites are included in the report. Select Include selected items or Exclude selected items depending whether you wish to include only selected sites or exclude selected sites from your reports. A Choose Criteria: Sites dialog box will appear.</p> <p><b>Note:</b> <i>if you already have sites in the Selected Criteria list on the Sites tab, you need to click Add to display the Choose Criteria dialog box.</i></p>	
3	<p>You have 3 methods for selecting sites:</p> <ul style="list-style-type: none"> <li>• Search for a sites by entering search text. Wildcards can be used. Click <b>Search</b>. The search results will be displayed in the Available Criteria List.</li> <li>• If you wish to filter sites based on the number of hits (the number of times a site has been accessed), select the <b>Display criteria by greatest number of hits</b> radio button. Enter the number of search requests you want to have returned (between 1 to 2000). Click <b>Search</b>. The sites will be displayed in descending order of hits in the Available Criteria List.</li> <li>• Select sites by scrolling through the Available Criteria List. You can select both continuous and non-continuous ranges of sites. Click <b>Add</b>. The selected sites will appear in the Selected Criteria field.</li> </ul> <p><b>Note:</b> <i>restricted users cannot change the criteria for Sites.</i></p> <p><b>Note:</b> <i>To increase the maximum number of hits to greater than 2000, consult Knowledge Base article 1596 from <a href="http://kb.surfcontrol.com">http://kb.surfcontrol.com</a></i></p>	
4	Click <b>OK</b> to confirm the selection.	

## Categories

By default 'None' sites not yet categorized by Web Filter are excluded in the report. This tab can be used to only include selected categories or to exclude selected categories for your reports.

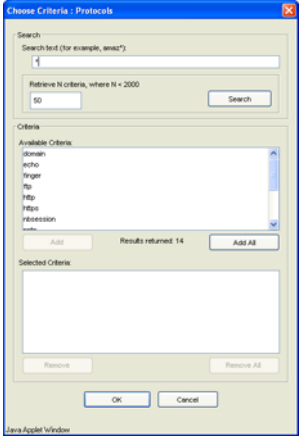
### Procedure 4-5: Specifying categories in a report

Step	Action
1	Select the <b>Categories</b> tab.
2	<p>By default, sites not yet categorized (None) are excluded. Select Include selected items or Exclude selected items depending whether you wish to include only selected sites or exclude selected sites from your reports. Click <b>Add</b>. A Choose Criteria: Categories dialog box will appear.</p> 
3	<p>You have 2 methods for selecting categories:</p> <ul style="list-style-type: none"> <li>• Search for a category by entering search text. Wildcards can be used. Click <b>Search</b>. The search results will be displayed in the Available Criteria List.</li> <li>• Select categories by scrolling through the Available Criteria List. You can select both continuous and non-continuous ranges of categories. Click <b>Add</b>. The selected categories will appear in the Selected Criteria field.</li> </ul> <p><b>Note:</b> <i>restricted users cannot change the criteria for Categories.</i></p>
4	Click <b>OK</b> to confirm the selection.

## Protocols

By default all protocols are included in a report. Use the Protocols tab to exclude protocols you don't want to report on.

### Procedure 4-6: Specifying protocols in a report

Step	Action	
1	Select the <b>Protocols</b> tab.	
2	<p>By default, all protocols are included in the report. Select Include selected items or Exclude selected items depending whether you wish to include only selected protocols or exclude selected protocols from your reports. A Choose Criteria: Protocols dialog box will appear.</p> <p><b>Note:</b> <i>if you already have protocols in the Selected Criteria list on the Protocols tab, you need to click Add to display the Choose Criteria dialog box.</i></p>	
3	<p>You have 2 methods for selecting protocols:</p> <ul style="list-style-type: none"> <li>• Search for a protocols by entering search text. Wildcards can be used. Click <b>Search</b>. The search results will be displayed in the Available Criteria List.</li> <li>• Select protocols by scrolling through the Available Criteria List. You can select both continuous and non-continuous ranges of protocols. Click <b>Add</b>. The selected protocols will appear in the Selected Criteria field.</li> </ul> <p><b>Note:</b> <i>restricted users cannot change the criteria for Protocols.</i></p>	
4	Click <b>OK</b> to confirm the selection.	

## Options

The Options tab appears for all the Summary Reports and those Detail Reports that use Browse Sensitivity data.

For Summary Reports (Figure 4-2) you can specify the value of ‘N’ to display the Top ‘N’ Results. The default is 10.



Figure 4-2 Options tab for Summary Reports

For Reports using Browse Sensitivity data (Figure 4-3), the tab displays two settings:

- **Browse duration alert** – any browsing that exceeds this limit will be highlighted in red in the report. The default setting is 5 minutes.
- **Browse sensitivity** – how many minutes are used to calculate browse sensitivity data. See “How Browse Sensitivity is calculated for reports” on page 45 for more details.

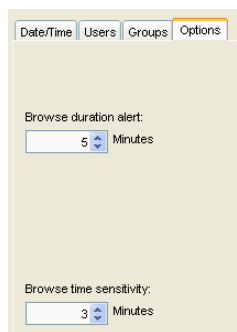


Figure 4-3 Options tab for Browse Sensitivity





## Database

The Database tab is displayed for Saved/Scheduled reports only and shows you the database connection settings used when the report was originally saved. SurfControl recommends that you do not attempt to change databases if reports are potentially being generated from the current one.

### Procedure 4-7: Changing the database used for reports

Step	Action
1	Select the <b>Database</b> tab.
2	Select a database connection from the drop-down list box.

You can now do one of the following:

- Revert to the default settings before saving – 
- Run Report – 
- Save As – 
- Save to replace the default settings – 

If you don't use any of the save options, the report will retain its default saved settings after the report is run.

## SPECIFYING RUNNING OPTIONS

The Running Options tab controls how your report is produced and where it is saved.

### Display Selected Criteria

You can choose whether or not the criteria you have include or excluded for the report will be displayed on the last page. If you choose to do this, the criteria you have **selected** will be printed. For example, if you choose to generate a report on Users, the criteria displayed on your report will say:

Selected Users: April, Brian, Mary



**Note:** If you use the default setting of including all criteria, the selected criteria will not be shown, even if you select Display Selected Criteria.

### Format

You can generate reports in the following formats in Table 4-11:

**Table 4-11** Report formats

Format	Details
.csv	Comma Separated Value – a text format that can be used by spreadsheet and database programs such as Microsoft Excel and Access. <b>Note:</b> .csv format is not available for reports in chart form.
.htm	You can view the report in HTML format using a Web browser.
.pdf	Portable Document Format is the default format. You require a reader such as Adobe Acrobat Reader (available as a free download from <a href="http://www.adobe.com">www.adobe.com</a> ) to view.
.rtf	Rich Text Format is a format that can be viewed in word processors such as MS Word.
.xls	Microsoft Excel Format (version 97 or later).



**Warning:** Pop-up blockers such as Google or Yahoo, and as installed by Microsoft Windows XP SP2 can prevent reports displaying in your browser. You should alter your settings to allow pop-ups from the Report Central address.

## Destination Type

You can specify how you want a report to display. If you choose to e-mail a report, note that reports are e-mailed in their native format and won't be compressed. If you are unsure about the size of a report to e-mail, save the report to your machine using the Schedule options. You can then check the size of the report before you send it. Table 4-12 shows the destination type options.




**Note:** If you create a report and e-mail it in html format, some e-mail programs may not preview the report correctly. However, if you open the e-mail, the report will display successfully.

Table 4-12 Destination type options

Option	Details
Show in Browser(default)	Reports in html and pdf format will open automatically in a browser window.
Send by e-mail	The report will be sent as an attachment to the e-mail address you specify.

Procedure Procedure 4-8 describes how to specify running options:

### Procedure 4-8: Specifying running options

Step	Action
1	Select the <b>Running Options</b> tab.
2	If you want to display the report criteria, select <b>Display Selected Criteria</b> .
3	Choose a report format from the list.
4	Choose how you want the report to be displayed, from the <b>Destination Type</b> menu.
5	If you have chosen to send the report as an e-mail, enter an e-mail address in the <b>Receiver's E-mail Address</b> field.
6	Click <b>Run</b>  to run the report.

## SCHEDULE SETTINGS

You can set up reports to run automatically at the time or date you choose. The Schedule Settings tab is used to schedule reports.

### Enabling Report Scheduling

To enable report scheduling, select the **Schedule Report** check box. When you enable report scheduling, two tabs will become available:

- Date / Time
- Save Options

### Date/Time

On this tab you can specify the following:

- **Time of Day** - specify the hour and minute you want to run a report (using the 24 hr clock).
- **Every** - specify which days of the week you want to run a report. You can run reports every day, once a week or on selected days.
- **Monthly** - specify a day of the month to run a report, or run a report on the last day of the month. If you select the monthly check box, the Daily/Weekly options are unavailable.

### Save Options

When the report you have scheduled is generated you can automatically save it to your hard drive by specifying save options.

**Table 4-13** Save Options

Option	Details
Format	You can save the report in the following formats: .csv .htm .pdf .rtf .xls see "Format" on page 62. for information about each format.
Destination type	Save on Hard drive – the report will be saved to your computer's hard drive. This is useful if you want to check the size of the file before e-mailing it.
	Send by e-mail – the report will be sent as an attachment to the e-mail address you specify.

# GENERATING REPORTS

Once you have set up your criteria, you are ready to generate the report.

## Managing large reports

Some reports will generate extremely large volumes of data, especially in large organizations with heavy network traffic. SurfControl Report Central limits the amount of information to 20,000 lines (approximately 1000 pages) per report. If you run reports that exceed this limit, a note is added to the first page of the report.


There are two ways to manage large reports:

- Print the report to file, see “Save Options” on page 64. You can then view the report without having to print it out, or print only selected pages.
- Constrain the report by limiting the range of data you are reporting on.

Table 4-14 shows the reports that can generate large volumes of data.

**Table 4-14** High-volume reports

Report type	Report name	How to Constrain it
Detail reports	Newsgroup Analysis	Limit the number of sites to 1000 or less.
	Site Access by Connections	
	Site Activity	
	Site Categorization Details	
	User Access	Limit the number of Users to 10 or less.
	User Activity	
	User Activity Detail	

When you have set up your report, click **Run**. Alternatively, if you want to return all the report options to their default settings, click **Revert to Default** .

## SAVING REPORTS

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When you have set up your report, you can save a copy to your hard drive. There are two ways you can save a report:

- Save the report to a shared folder.
- Save the report to a personal folder.

See “Setting up Users” on page 14 for more information about folders and permissions. Procedure Procedure 4-9 shows how to save a report.

### SHARED FOLDER

Any user can see report criteria that have been saved in the shared folder. They can also modify the report criteria that were saved and overwrite them by saving the report criteria with the same name.



**Note: If you change a report from the shared folder, save it with a different name to make sure that you do not overwrite another user’s report.**

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### PERSONAL FOLDER

Reports saved to the personal folder can be viewed only by the user who created it

To save a report, follow Procedure 4-9.

#### Procedure 4-9: Saving a report

Step	Action
1	Set up the report using the criteria and options you want.
2	When you are happy with the report, click <b>Save As</b> . The <b>Save Report</b> dialog box will open.
3	Select the folder you want to save the report into.
4	In the <b>Report Name</b> field, give your report a name.
5	Click <b>Save</b> . The Completed Reports tab will appear on the dialog box.

## SAVED REPORTS

When you have saved a report to the shared or personal folders, a new tab, **Saved Reports**, will be added to the dialog box. This tab shows which reports have been generated.



**Note: Only reports that have been saved into the shared or personal folders are displayed in the completed reports tab. Reports sent as e-mail are not displayed there.**

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You can create new folders within the Shared and Personal folders by clicking  .

You can delete Shared and Personal reports by clicking  .



## **REPORT MANAGER** *Saving reports*