2014 Release 5 Portal Update for Websense® Cloud Security

Updated: 18-August-2014

Applies To:	Websense Cloud Security Solutions, 2014 Release 5

This release introduces the latest version of the Websense cloud portal, offering an updated and significantly improved user interface experience. The portal's look and feel has been redesigned for visual clarity and ease of navigation.

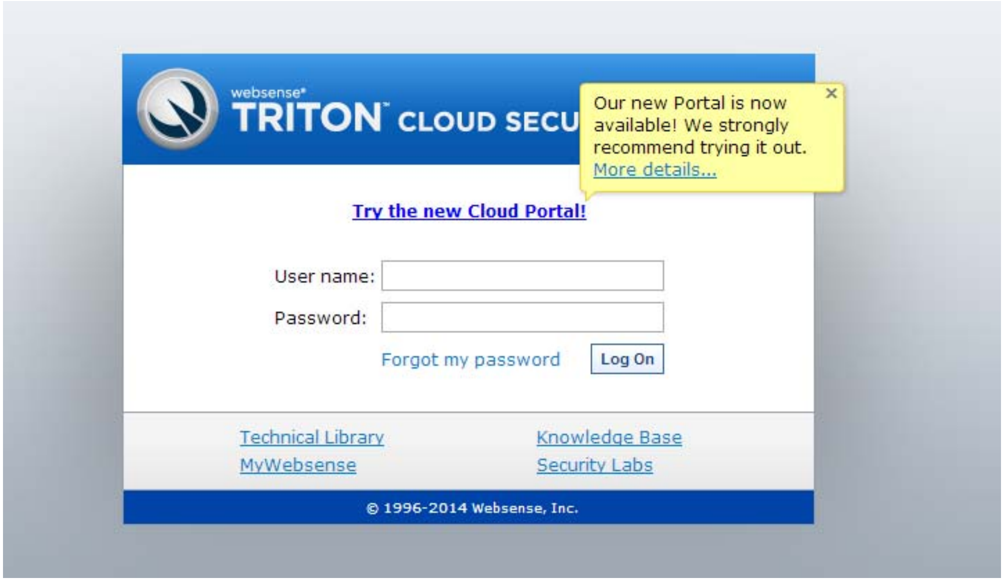
In addition, the new look and feel includes access to an enhanced reporting system for Cloud Web Security customers.

Important

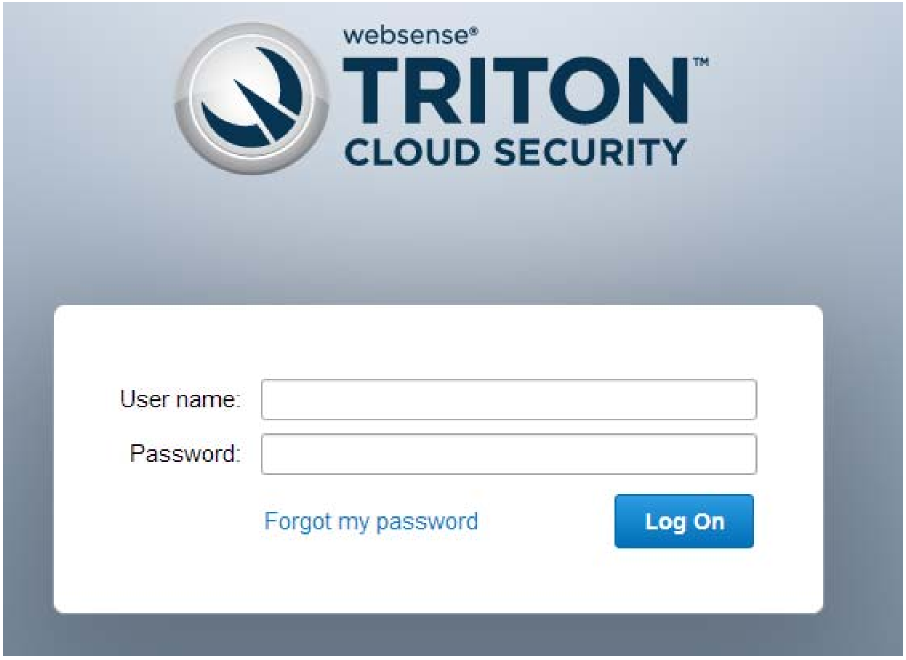
In 2014 Release 5, portal updates are happening in 2 stages. Stage 1, which updates the portal look-and-feel and introduces new reporting for Cloud Web Security, is available from early September and is covered in these release notes. Stage 2, which deploys new and updated features for Cloud Email Security and Cloud Web Security, is available from mid-October and is covered by separate release notes.

New portal look and feel

You can switch to the new look and feel, and access the new dashboard and Cloud Web Security reporting features, when you are ready to do so. The switch option is available from the logon screen.



The look and feel switches over immediately. The change applies to just your administrator account; all other administrators in your organization can switch over when they are ready.



For a limited period, you can switch between old and new versions of the portal, using the **Revert** option on the logon screen, before an automatic upgrade is implemented. Regular notifications will be sent via email and portal alerts to tell you when this transition period will end.

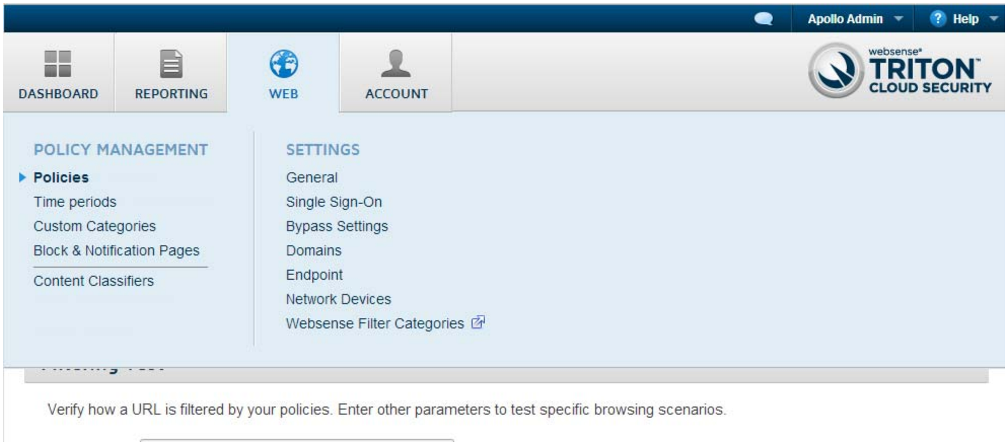
Supported browsers

The new version of the portal is supported in the following browsers:

- Internet Explorer versions 8 through 11
- Mozilla Firefox versions 4.x through 30
- Google Chrome versions 13 through 35
- Safari 7.0.3

What has changed?

The new look and feel replaces the left-hand navigation menu with drop-down menus available from the tabs in the toolbar. Click **Web** or **Email** to see all of your policy and configuration options.



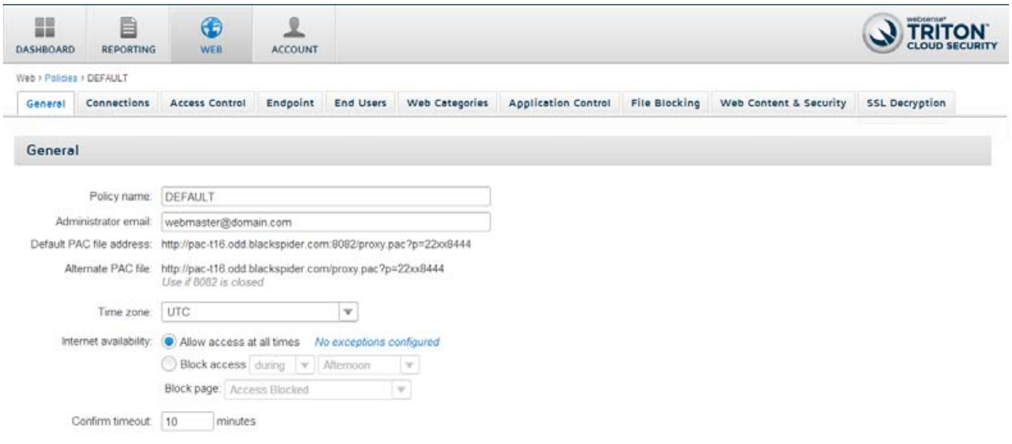
Click the toolbar tab again to close the menu.

There is no longer a **Home** tab in the toolbar. You can find the options previously located under **Home** in the following places:

- To see the new-style dashboards, click **Dashboard**.
  - Cloud Email Security customers see the Email dashboard on this page.
  - Cloud Web Security customers see the new Threat, Productivity, and Bandwidth dashboard tabs. See *Using the Dashboard*, page 5.
  - Customers of both Cloud Email Security and Cloud Web Security see all available dashboards, with the Email dashboard as a further tab on the page.

- To access the new web reporting functionality and the account reports, including any saved reports, click **Reporting**. Web and saved reports were previously available under **Web Security**. Email reporting, previously located under **Email Security**, can also be found here.
- To access your Support options, including links to the Websense Technical Library and the Knowledge Base, click the **Help** menu in the top right corner. Note that release notes are now located in the Technical Library, and are accessible with a MyWebsense account.
- To change your password, click **Account** and then select **My Account** from the drop-down menu.

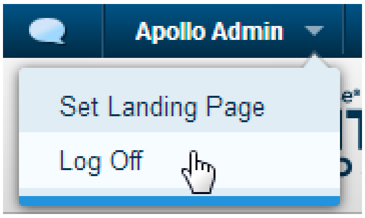
The pages in the portal all have a new look and feel. The example below shows how a web policy now appears.



For Cloud Web Security customers, note that **Network Devices** is now an option under the **Web** menu rather than a toolbar button in its own right.

For Cloud Email Security customers, note that “per-user configurations” in policies are now referred to as “exceptions”.

Finally, when you are ready to log off, click the arrow next to your administrator account name and select **Log Off**.



What has not changed?

The available features in the portal and your account information are unchanged as a result of this update.

Cloud Web Security Reporting

The updated Cloud Web Security reporting system offers the following new features:

The **Dashboard** gives you an overview of how your users and groups are browsing the web. Based on time frames that you select, you can see how security risks, productivity, and bandwidth usage are affecting your organization, and adjust policies accordingly.

The **Report Catalog** contains a number of predefined reports that cover common scenarios, available in bar chart, trend chart, and tabular formats. You can copy any predefined report to apply your own filters to create a custom report, and share your reports with other administrators.

The **Report Builder** offers an enhanced model for creating multi-level, flexible reports that allow you to analyze information from different perspectives and gain insight into your organization's Internet usage. If a high-level summary shows areas of potential concern, you can drill down to find more details and use **Transaction Viewer** for granular reports on individual transactions.

Short 'Getting Started' video tutorials for the Report Builder and Transaction Viewer are available from the cloud portal.

- *Using the Dashboard*
- *Using the Report Catalog*
- *Using the Report Builder*
- *Using Transaction View*
- *Scheduling reports*

Using the Dashboard

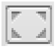
The dashboard page provides a snapshot view of how Cloud Web Security Gateway is performing. It includes the following tabs:

- The **Threat Dashboard** appears when you first access this page. It shows information about suspicious activity that may be related to malware threats in your network.
- The **Productivity Dashboard** shows information about blocked requests, and activity in social media categories.

- The **Bandwidth Dashboard** shows information about traffic patterns in your network, including the categories, groups, and users consuming the most bandwidth.

See the Help for more details of these dashboard tabs.

Each dashboard includes the following features:

- A number of charts that provide detailed web activity information. Most dashboard charts can be customized to change their display format (for example stacked column, area chart, line chart, bar chart, or pie chart). On most charts, you can click the **Maximize** button () to see a larger version in a popup window. You can also click columns or sections on a chart to drill down to the relevant report in the Report Builder.

  For more information on the available charts, see the sections for the individual dashboard tabs.
- A summary statistic in the top left that covers web activity relevant to the current dashboard over a defined time period (the last day by default). This time period defines both the number in the summary statistic and the range displayed in the dashboard charts. You can select a different time period from the drop-down list: the alternative options are 1 hour, 4 hours, 8 hours, 12 hours, 3 days, 5 days, and 7 days.
- One or more filters that define the range of content shown in the charts. To edit a filter:

  a. Click the filter name. On the popup that appears, use the drop-down list to define how the filter handles the values that you specify. The options available depend on the filter type – for example, you may be able to include or exclude values, or state that search terms contain or do not contain your text.

  b. Enter or select the search term or value(s) that you wish to filter on. Depending on the filter, you can:

     - Select one or more check boxes
     - Start typing text that will autocomplete based on data in the system
     - Enter the exact text that you want to use

     For filters where you are including or excluding values already stored in the system, start typing to see a list of potential matches, then select the option you want from the list. You can add multiple values to the filter.

     For filters where you enter free text, enter the terms you want separated by commas.

  c. Click **OK** when done.

  If you change the filters and then wish to revert to the default **All** filter, click **Reset**. Filters apply to individual dashboard tabs – for example, editing the filters on the Threats tab has no effect on the Productivity tab.

The dashboard is automatically refreshed whenever you make a change – for example, editing the filters. You can also click the **Refresh** button in the top right corner to force a refresh of the charts.

Using the Report Catalog

To access the Report Catalog, select **Reporting > Report Catalog**. It includes the following elements:

- The **Toolbar** at the top of the page contains buttons for returning to the previous page, creating new reports and folders, copying, sharing, and deleting items.
- The **folder list**, in the left-hand pane, contains 3 top-level folders:
  - **My Reports** contains all of the reports and folders that you create.
  - **Standard Reports** contains the predefined reports provided in Cloud Web Security. These are divided into the following folders:
    - Advanced
    - Bandwidth
    - Misconduct
    - Productivity
    - Risk Activity
    - Security
    - Social Media
    - Web Activity
  - **Shared by Others** contains items that have been shared for use by all administrators in your account. Each folder has the user name of another administrator, and contains the reports shared by that administrator.

  If a folder contains one or more sub-folders, click the arrow to see those sub-folders in the left-hand page. Click a folder name to see its contents in the right-hand pane.
- The table in the right-hand pane displays the contents of the folder you select in the folder list. This can be one or more-sub-folders, or a list of reports. To see a description of a particular report, hover the mouse over the report name.

  From this pane, you can perform actions on one or more reports and folders, such as copying, renaming, and deleting folders, or editing, running, or sharing a report. The actions available to you depend on the permissions configured – for example, you cannot delete reports in the Standard Reports folder.
- The **Search** field enables you to search for specific words or phrases in report titles. Search results list the report name, its location, and if applicable, the report owner and the last time it was edited. You can manage a report directly from the search results list – for example you can run it, or if you have suitable permissions, share or delete it.

See the Help for full details of managing reports and folders in the Report Catalog.

Using the Report Builder

The Report Builder has the following elements:

- The **Toolbar**, at the top of the page, contains buttons for starting a new report, saving, scheduling, and sharing the current report, and updating the current report display. There are also buttons for exporting reports in PDF or CSV format.
- The **Attributes** list in the left pane contains the data types that you can use to create reports. For Web Security, you can switch between Web, Authentication, and Protocol attributes by clicking the option you want at the bottom of the column (Web, Auth, or Prot).

  The Web attributes are divided into the following sections:

  - General
  - URL
  - IP Address
  - Security
  - Time
  - Media
  - Referrer URL
  - Advanced

  The Authentication and Protocol attributes are each divided into General and Time.

  Use the Search box at the top of the list to filter the Attribute list further.
- The **Metrics** list, in the left pane, contains options that you can add as columns to the report. Drag metrics into and out of the report results area to add them to or remove them from the report. The available metrics change depending on the attributes that are selected. Further advanced metrics are available in Transaction View.

  All reports contain Hits as the primary metric, as signified by a star in the column name. To change the primary metric, drag a second metric to the report and then sort by that new metric to make it the primary.

> **Note**
>
> If you add the Browse Time metric to your report, note that the browse time totals may not be accurate for second-level grouping data.
>
> For example, if you create a report with the first attribute as User and the second as Domain, and a user goes to 2 different sites within the same minute the browse time totals are correct at the first level for the user, but at the second level the 2 sites are each allocated 1 minute of browse time. Therefore you cannot accurately add up the browse time totals at the second level.

- In the right pane, the **Grouping** field can contain up to 2 attributes to define the data grouping that appears in the report. For example, if you drag the Category attribute followed by the Action attribute into this field, this creates a summary report on hits by category, and also displays the data broken down by action within those categories.

- The **Filters** field can contain attributes to filter the report results further. For example, you may wish to filter by specific users, authentication methods, or file types.
- The **Date range** defines the time period covered by the report. This can be a standard period (between 1 hour and 8 months) or a specific date and time range.
- Next to the date range, the **display options** enable you to select how many rows appear in your report. Once a report has been generated, this section also includes options to page through longer reports, and to display the report results in different table and graph formats.

The **report results** appear in the right pane when you click **Update Report**, and by default are in a table format. You can choose to display the results in different formats as described above, and to select report elements to drill down further.

Using Transaction View

Transaction Viewer enables you to see full details for individual web transactions and requests. Where Report Builder shows you high-level analysis from the perspective you wish to apply, Transaction Viewer gives you an additional layer of granular information for each transaction. You can manipulate the data further by adding extra filters and columns.

You can either access Transaction View directly from the Reporting tab to build your own transaction-level reports, or you can drill down from the Report Builder:

1. Mark the check box next to each item you wish to view.

   You can select multiple items and change your selections, even after the popup window appears.
2. In the popup window, select **View Transactions**.

You can also click an entry in any metrics column to view that entry as individual transactions.

Transaction View loads, listing the date, time, and URL of each transaction within the report item(s) you selected.

In Transaction View, you can:

- Edit the filters and date range for the transactions you wish to see.
- Select the columns to display from the **Columns** drop-down. Click **Done** when you have made your selections.

- Click a column heading to make it the active column for sorting transactions. Click again to switch between ascending and descending order.

> **Note**
> To sort transactions by timestamp, click the Date column, not the Time column. Sorting by the Date column automatically orders transactions by both date and time.

- Delete columns by clicking the X icon in a column heading. Note that you cannot delete the current active column.
- Drag attributes and metrics from the left-hand pane into the Filters field.
- Drag attributes and metrics from the left-hand pane into the main report pane to add them as new columns.
- Enable Detail View to see more detail for the selected transaction. You can also double-click a row to open Detail View. The Transaction Details pane opens at the bottom of the page, and contains 3 tabs:
  - General lists information such as the user who performed the transaction, the policy, the action, the Web category and risk class.
  - Request Details shows the full URL, source and destination IP addresses, the referrer URL, the full MIME type, and the request method.
  - Advanced lists HTTP status code, total bandwidth used, filtering time, server response time, authentication method, and user agent.

Scheduling reports

The Scheduler page lists the scheduled jobs created for web reports. The list gives basic information about the job, such as how frequently it runs and which administrator owns it. From this page, you can add and delete scheduled jobs, and edit the content and frequency of jobs.

The list provides the following information for each job.

Column	Description
Job Name	The name assigned when the job was created.
Recurrence	The recurrence pattern (Once, Daily, Weekly, Monthly) set for this job. For daily, weekly, and monthly reports, the recurrence includes further options for the days the report is run.
Starting	The defined start date for the job.
Ending	The end date for the job. If no end date is set, the column displays Never.
Owner	The user name of the administrator who scheduled the job.

Use the options on the page to manage the jobs:

- Click the job name link to edit the job definition.
- Click **Add Job** to define a new job.
- Select a job and then click **Delete** to delete a scheduled job. After a job has been deleted, it cannot be restored.

The Allowance in the top right corner shows you how many jobs are currently scheduled, and the maximum number of jobs available to you.

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