Websense Email Security Transition: Policies and Settings

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Websense® Email Security Gateway is an appliance-based email security solution that combines on-premises email analysis with world-class Web analytics to provide maximum protection against today's sophisticated blended threats. The Email Security Gateway Anywhere email hybrid service adds in-the-cloud prefiltering capabilities to the robust analysis capabilities of the on-premises solution. Websense ThreatScope™ add-on functionality includes file and URL sandboxing capabilities to analyze and provide feedback regarding suspicious files and attachments.

This solution also offers Websense Data Security data loss protection (DLP) technology to accurately detect the transmission of sensitive data via email. Integration with Websense Web Security allows Email Security Gateway to use that module's master URL database to detect malicious embedded URLs in email.

This paper is for users of the Websense Email Security software solution who want information about making the transition to Email Security Gateway or Email Security Gateway Anywhere. It describes how to configure some common email policies in Email Security Gateway. Also included is a list of the locations of configuration settings in Websense Email Security and their corresponding locations in Email Security Gateway.

For a general description of Email Security Gateway and some suggestions for easing the transition from Websense Email Security, see Websense Email Security Transition: Overview.

Contents:

Sample policies in Email Security Gateway

Rules in Websense Email Security are created from separate, modular components in the Rules Administrator, a graphical drag-and-drop tool. In Email Security Gateway, you create a policy that applies to a specified set of email senders and recipients, then determine the rule that defines how messages that match the sender/recipient conditions are handled.

A Data Security email DLP policy for Email Security Gateway is configured in the Data Security console and enabled for enforcement in the Email Security Gateway console.

This chapter includes instructions for creating some common, sample policies in Email Security Gateway. You may already have rules to address these situations in Websense Email Security.

Block a message that contains specific keywords

To create a policy in Email Security Gateway to quarantine an email that contains specific keywords either in the message subject or body, you can configure either a custom content filter for an Email Security Gateway policy or an email DLP policy in Data Security. A custom content filter is a good option for basic keyword analysis, and a message that triggers this filter is quarantined in an Email Security Gateway message queue. You can use an email DLP policy for complex rules to quarantine a message in a Data Security queue.

For an email custom content filter, perform the following steps in the Email Security Gateway module:

1. Navigate to the **Main > Policy Management > Filters** page and click **Add**.
2. Specify a name and brief description for the filter.
3. Select **Custom Content** in the **Filter type** drop-down list.
4. Select whether to trigger the filter when any defined condition is matched or when all defined conditions are matched.
5. Click **Add** in the Filter Conditions box to open the Add Condition dialog box.
6. In the Message Attribute drop-down list, select **Message subject** or **Message body text**, depending on which element you want analyzed.
7. In the Condition details box, choose an operator (Contains, Does not contain, Matches regular expression, Does not match regular expression).
8. Enter the text you would like the filter to detect.
9. Mark the **Match case** check box if you want to use that option.
10. Click **OK**.

For an email DLP policy, perform the following steps in the Websense Data Security module:

1. Select **Main > Policy Management > DLP Policies > Email DLP Policy**.

2. Select either the **Outbound** or **Inbound** tab to specify the email direction.
3. Select the **Patterns & phrases** attribute.
4. Add a keyword:
   a. Select the **Enable attribute** check box.
   b. Click **Add** to open the Add Pattern or Key Phrase dialog box.
   c. Select the **Key phrase** option and then enter a word or phrase for which you would like to trigger the policy.
   d. Select number of matches needed to trigger the policy (default value is 1).
   e. Specify the email fields you would like searched.
   f. Click **OK**.
5. Specify the **Severity** (High, Medium, or Low) and set the **Action** to **Quarantine**.
6. Click **OK**.

Edit or add rules to an email policy

You can edit existing policy rules or add a new rule to a policy in Email Security Gateway for flexibility in controlling message traffic in your organization.

Edit existing policy rules in Email Security Gateway as follows:

1. In the Email Security Gateway module, select **Main > Policy Management > Policies** and then click **Add**.
2. Define policy properties:
   a. Specify a name and description for the policy.
   b. Set the status and assign the policy order.
   c. Specify the sender/recipient conditions for this policy.
3. Edit an existing policy rule by clicking a rule name.
   - To edit existing filter properties, click **Edit** in the Filter section.

     To add new a new filter, select Add filter from the Filter name drop-down list.
   - To edit action options, click **Edit** in the Action section.

     To add a new action, select **Add action** from the Action name drop-down list.
4. Click **OK** to close the Edit Rule page.
5. Click **OK** to save your policy.

You may add a new rule only in association with a custom content filter. Add a custom rule as follows:

1. In the Email Security Gateway module, select **Main > Policy Management > Policies** and then click **Add**.
2. Define policy properties:
   a. Specify a name and description for the policy.
   b. Set the status and assign the policy order.
   c. Specify the sender/recipient conditions for this policy.

3. Add a new policy rule by clicking **Add** in the Rules section.
    a. Select a custom content filter in the Filter section. Click **Edit** in the Filter Properties box if you want to add or edit the filter conditions.

       To add a new custom content filter, select **Add filter** from the Filter name drop-down list.
    b. Select an action from the drop-down Action name field. Click **Edit** in the Action section to modify action options.

       To add a new action, select **Add action** from the Action name drop-down list.
4. Click **OK** to close the Add Rule page.
5. Click **OK** to save your policy.

Disable a rule within a policy

You can block rule application within a policy by disabling the rule. Block the application of a rule within an Email Security Gateway policy as follow:

1. In the Email Security Gateway manager, select **Main > Policy Management > Policies**.
2. Select a policy from the **Inbound**, **Outbound**, or **Internal** list.
3. Click the name of the rule you want to disable.
4. Select the **Disabled** option for the rule status.
5. Click **OK** to save your rule changes.
6. Click **OK** to save your policy changes.

Configure message and attachment size

You can restrict inbound email messages from being delivered if the message data exceeds a specific size. Create a policy to quarantine a message if the message body or attachment exceeds the specified limit.

Message size and attachment size per connection limits can be set in the Email Security Gateway module or the Data Security module.

Restrict message and attachment size per connection using the Email Security Gateway module as follows:

1. On the **Settings > Inbound/Outbound > Directory Attacks** page, select the **Limit the number of messages/connections per IP every** option, and then specify a time limit using the drop-down menu.
2. Specify a message limit in the **Maximum number of messages** field.
3. Specify a connection limit using the **Maximum number of connections** options.
4. Click **OK**.

You can also use the message size options available in the following Email Security Gateway pages:

- **Settings > Inbound/Outbound > Message Control**
- **Settings > Inbound/Outbound > Connection Control**
- **Main > Policy Management > Filters > Add Filter** (add a custom content filter)

For more information about setting message size and attachment limitations in Email Security Gateway, see the following Email Security Gateway Manager Help topics:

- Configuring message properties
- Managing connection options
- Creating and configuring a filter

Restrict message and attachment size per connection using the Data Security module as follows:

1. On the **Main > Policy Management > DLP Policies > Email DLP Policy** page, select the **Message size** attribute.
2. Select the **Enable attribute** check box and then use the up or down arrow to select the message size to monitor.
3. Specify a **Severity** (High, Medium, Low) and set the **Action** to **Quarantine**.
4. Click **OK**.

Configure advanced content analysis

Advanced content analysis provides comprehensive checking of message header, message body, and message attachments. It also supports the dynamic evaluation of keyword frequency.

Advanced content analysis can be configured in the Data Security module. Content analysis settings are available for the following content classifiers:

- Patterns and phrases
- File properties
- Fingerprint
- Transaction size
- Number of email attachments
- Number of email destinations

Configure advanced content analysis for Email Security Gateway as follows:

1. In the Data Security module, select **Main > Policy Management > DLP Policies**.
2. Click **Create custom policy** to create a new policy using the custom policy wizard.
3. Complete the **General** tab in the wizard and click **Next** to access the **Condition** tab.
4. Click **Add** and select a content classifier from the drop-down list to configure its advanced settings.

For example, you may want to define a threshold for the content classifier, or impose a limit to the rule so that it searches for specific fields. The advanced settings available depend on the content classifier you select.

5. Click **Next** to continue using the custom policy wizard to create a policy. You should complete the **Severity & Action**, **Source**, and **Destination** tabs.
6. Click **Finish**.

You can also use an Email Security Gateway custom content filter to analyze various message attributes like message header or body text (**Main > Policy Management > Filters > Add Filter**). See Creating and configuring a filter in the Email Security Gateway Manager Help for details.

Analyze message attachments

You can block inbound and outbound messages that contain attachments. Configure message attachment analysis for Email Security Gateway as follows:

1. In the Data Security module, select **Main > Policy Management > DLP Policies > Email DLP Policy**.
2. Click either the **Inbound** or **Outbound** tab, and then select the **Number of attachments** attribute.
3. Specify the attributes for number of attachments.
   a. Select the **Enable attribute** check box.
   b. Use the up or down arrow to specify the **Detect email messages with at least *n* attachments** condition.
   c. Specify the **Severity** (High, Medium, Low) and set the **Action** to **Quarantine**.
4. Click **OK**.

You can also use the Websense ThreatScope file sandboxing capabilities to analyze attachments that may contain security threats. See Creating and configuring a filter in the Email Security Gateway Manager Help for details about configuring file sandboxing analysis.

Configure dictionary threshold limits

You can set a threshold value for words or phrases in a dictionary. This value determines whether a message should be blocked based on the keyword frequency within the message.

Configure a dictionary and its threshold limits for Email Security Gateway as follows:

1. In the Data Security module, select **Main > Policy Management > DLP Policies**.
2. Click **Create custom policy** to open the custom policy wizard.
3. Complete the **General** tab and then click **Next**.
4. On the **Condition** tab, select **Add > Patterns & Phrases**.

a. On the **General** tab in the Select a Content Classifier dialog box, select **New > Dictionary**.

b. In the **Add Dictionary** dialog, name your dictionary and define the properties for the dictionary classifier and then click **OK**.

   For more information about creating dictionary classifiers, refer to the Data Security Manager Help topic titled Adding a dictionary classifier.

5. Click **Next**.
6. Specify the **Severity** (High, Medium, Low) and set the **Action** to **Quarantine**.

   You can also define **Advanced** conditions for the rule to change severity and action when specific conditions are met.
7. Specify a **Source** filter range and then click **Next**.
8. Specify a **Destination** filter range and then click **Next**.

> **Note**
> The **Destination** settings and the **Source** destination settings must be the same.

9. Click **Finish**.

Configuration Settings

Migrating your Websense Email Security settings to Websense Email Security Gateway is a manual process. Determining the correct settings and their location in Email Security Gateway can be a time-consuming operation.

Printing your Websense Email Security configuration settings can streamline the transition process. See Websense Email Security Transition: Overview for information about printing the configuration settings.

The following table lists Websense Email Security configuration settings and the user interface location of the corresponding settings in Email Security Gateway.

Websense Email Security setting	Email Security Gateway Manager location
Dashboard	For version 7.8.1: **Main > Status > Today** **Main > Status > History** **Main > Status > Alerts** For version 7.8.2 and later: **Main > Status > Dashboard** **Main > Status > Alerts**
Email Connection Management	

Websense Email Security setting	Email Security Gateway Manager location
Protected Domains	**Settings > Users > Domain Groups**
Mail Relays	**Settings > Inbound/Outbound > Relay Control**
Blacklist	**Main > Policy Management > Always Block/Permit** **Settings > Inbound/Outbound > Connection Control**
Reverse DNS lookup	**Settings > Inbound/Outbound > Connection Control**
Reputation/DNS blacklist	**Settings > Inbound/Outbound > Connection Control**
Directory Harvest Detection	**Settings > Inbound/Outbound > Directory Attacks**
Denial of Service Detection	**Settings > Inbound/Outbound > Connection Control**
Remote User Authentication	**Settings > Users > User Authentication**
SPF check	**Settings > Inbound/Outbound > Relay Control**
Receive Service	**Settings > Inbound/Outbound > Connection Control** **Settings > Inbound/Outbound > Message Control**
SMTP Properties	**Settings > General > System Settings** **Settings > Inbound/Outbound > Connection Control**
Connections	**Settings > Inbound/Outbound > Message Control** **Settings > Inbound/Outbound > Connection Control**
ESMTP Commands	**Settings > Users > User Authentication** **Settings > Inbound/Outbound > Enforced TLS Connections** **Settings > Inbound/Outbound > Encryption**
Rules Service	**Main > Policy Management > Policies** **Main > Policy Management > Filters** **Main > Policy Management > Actions** **Note**: You can also configure an email DLP policy in the Data Security module.

Websense Email Security setting	Email Security Gateway Manager location
Configuration	**Settings > Inbound/Outbound > Connection Control** **Settings > Inbound/Outbound > Message Control** **Settings > Inbound/Outbound > Mail Routing** **Settings > Inbound/Outbound > TLS Certificate** **Settings > Administrators > Delegated Administrators** **Main > Policy Management > Policies** **Main > Policy Management > Filters** **Main > Policy Management > Actions** **Note**: You can also configure an email DLP policy in the Data Security module.
Queue Management	**Main > Message Management > Message Queues** **Main > Message Management > Blocked Messages** **Main > Message Management > Delayed Messages**
Send Service	**Settings > General > System Settings** **Settings > Inbound/Outbound > Connection Control** **Settings > Inbound/Outbound > Mail Routing** **Settings > Inbound/Outbound > Undelivered Options**
SMTP Properties	To set the SMTP greeting text: **Settings > General > System Settings** To set the SMTP greeting delay interval: **Settings > Inbound/Outbound > Connection Control**
Connections	**Settings > Inbound/Outbound > Connection Control**
Routing	**Settings > Inbound/Outbound > Mail Routing** **Settings > Inbound/Outbound > IP Groups** **Settings > Inbound/Outbound > Undelivered Options**
Smart Host Routing	**Settings > Inbound/Outbound > Encryption** **Main > Policy Management > Policies** **Main > Policy Management > Filters** **Main > Policy Management > Actions**

Websense Email Security setting	Email Security Gateway Manager location
Requeuing Scheme	**Settings > Inbound/Outbound > Undelivered Options**
Domain Substitution	**Settings > Inbound/Outbound > Address Rewriting**
Logging	**Main > Status > Logs** **Main > Status > Real-Time Monitor**
Administrator Alerts	**Settings > Alerts > Enable Alerts** **Settings > Alerts > Alert Events**
Message Administrator	**Main > Message Management > Message Queues** **Main > Message Management > Blocked Messages** **Main > Message Management > Delayed Messages** **Main > Status > Logs** **Main > Status > Real-Time Monitor**
True Source IP	**Settings > Inbound/Outbound > True Source IP**
Administration Service	**Settings > General > System Settings** **Settings > Administrators > Delegated Administrators** **Note**: Administrator accounts are created in TRITON Unified Security Center Settings. A Super Administrator can manage those created accounts in the Delegated Administrators page.
Accounts	**TRITON Settings** **Settings > Administrators > Delegated Administrators** **Settings > Administrators > Roles**
Certificate Management	**Settings > Inbound/Outbound > TLS Certificate** **Settings > Personal Email > SSL Certificate**
Dictionary Management	**Main > Policy Management > Filters > Add custom content filter** In Data Security: **Main > Policy Management > DLP Policies > Create custom policy**
Monitor	**Main > Status > Real-Time Monitor**

Websense Email Security setting	Email Security Gateway Manager location
Scheduler	For database downloads: **Settings > General > Database Downloads** For database maintenance tasks: **Settings > Reporting > Log Database**
Database Management	**Settings > Reporting > Log Database** **Settings > Reporting > Log Server** **Settings > Reporting > Preferences**
Virtual Learning Agent	In Data Security: **Main > Policy Management > Content Classifiers > Machine Learning**
Personal Email Manager	**Settings > Personal Email > Notification Message** **Settings > Personal Email > User Accounts** **Settings > Personal Email > End-user Portal** **Settings > Personal Email > SSL Certificate**
Report Central	**Settings > Reporting > Preferences** **Main > Status > Presentation Reports**