Upgrading User Quick Start Tutorial

Websense® Web Security
Websense Web Filter

v7

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Trademarks

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To get started, choose a topic.

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What's new in Version 7?

Websense Web Security and Websense Web Filter, Version 7, include a new, browser-based Websense Manager interface to make it easier to configure and manage your Websense software from anywhere in the network.

If you're accustomed to previous versions of Websense Manager, you may want to start with an overview of the new interface:

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Your Websense software also includes a number of new features that you can use to:

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For late-breaking news about what has changed in this version, see the Release Notes, available from the Websense Support Portal.

Websense Manager’s new look

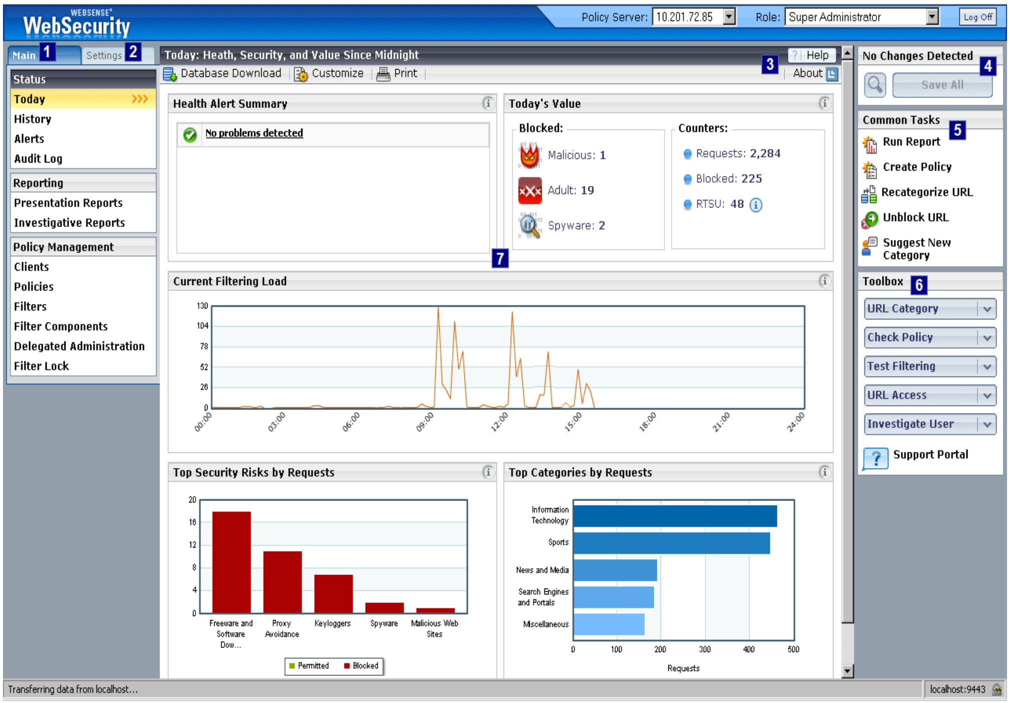
Websense Manager is now a browser-based tool. This means that administrators can use a supported browser (Microsoft Internet Explorer 7 or Mozilla Firefox 2) to access Websense Manager from anywhere in the network.

To launch Websense Manager directly from the browser, enter the following URL in the address bar:

```
https://<IP address or host name>:9443/mng
```

Replace <*IP address or host name*> with the IP address or name of the Websense Manager machine.

As in previous versions, Websense Manager provides access to both policy management tools and Websense software configuration settings. New in this version, Websense reporting tools are also accessed through Websense Manager.



Legend

1 The **Main** tab offers access to all policy management tasks, as well as to Websense status information, including alerts and audit logs, and to all Websense reporting tools (if you have installed reporting on Windows).

2 The **Settings** tab provides access to most Websense software configuration tasks, previously accessed via the Server > Settings menu.

Legend

3 The content pane title bar and toolbar offer access to **Help** tools. Click About to show or hide basic information about the current page, or go to Help > Explain This Page for detailed explanations and instructions. The entire Websense Manager Help system, as well as the New User and Upgrading User Quick Start tutorials, are also available from the Help menu.

4 As in previous versions, much of the work done in Websense Manager is cached when you click OK. The **Changes** box in the top, right portion of the screen indicates whether there are cached changes waiting to be saved. Click the small button with the magnifying glass icon (View Pending Changes) to see a list of currently cached changes before saving.

5 The **Common Tasks** lists provides quick links to the pages where the most frequently-performed Websense Manager tasks can be performed. The last link, Suggest New Category, links to the MyWebsense site, where, after logging on, you can suggest that a site be recategorized in the Master Database.

6 The **Toolbox** lets you quickly identify how a site is categorized, which policy applies to a specific client, how a specific request by a given client is filtered, whether a URL has been accessed from within your network in the past 14 days, and what sites a user has requested in the past 14 days. The last two queries launch an investigative report (formerly, Websense Explorer report) with the details. See *Verify your Websense filtering setup*, page 10**.**

7 Each time you open Websense Manager, the **Status > Today** page provides an overview of the current status of your Websense software. Boxes at the top of the screen show whether any errors or warnings have been generated by Websense components, and provide a quick overview of Internet request totals and key block totals. If you have installed reporting components on a Windows machine, additional charts provide a graphical overview of today's filtering behavior. See *Monitor filtering status*, page 9.

New terms and concepts

As part of an overall effort to make the Websense Manager interface more intuitive, several concepts, policy components, and features have been given new names. For example, since category sets, yes lists, and protocol sets have similar roles in determining how policies filter client requests, they have been renamed *category filters*, *limited access filters*, and *protocol filters*, respectively, and are collectively referred to as *filters*.

The following list provides a quick reference to help you find features whose names have changed:

Original Term	New Term
Always Block (category set)	Block All (category filter)
category set	category filter
continue (filtering option)	confirm (filtering action)
Custom URLs (Not Filtered)	unfiltered URLs
Custom URLs (Recategorized)	recategorized URLs

Original Term	New Term
directory objects	users (all directory service entries—users, groups, domains, and organizational units—that can be added as filtering clients)
disposition	action
Filter Definitions	• Policies • Filters (category filters, protocol filters, and limited access filters) • Filter Components (categories, protocols, custom URLs, keywords, and file types)
filtering option	action *or* filtering action
*Global policy	Default policy
hits (used in reporting)	hits, *also* requests (generic term for hits and visits)
Never Block (category set)	Permit All (category filter)
pattern	regular expression
protocol set	protocol filter
Remote Administrator	conditional Super Administrator (Some administrator permissions have changed. See *Identify conditional Super Administrators*, page 12.)
Save Changes	Save All
Super Administrator	unconditional Super Administrator
URL pattern	regular expression
visits	visits, *also* requests (generic term for hits and visits)
Web Filter Lock	Filter Lock
Websense Explorer	investigative reports
Websense Reporter	[discontinued], *replaced by* presentation reports
workstation (client)	computer
yes list	limited access filter

Monitor filtering status

When you open Websense Manager, the **Status** > **Today** page gives an overview of Websense software status and Internet usage and filtering since midnight. At the top of the page:

- The **Health Summary** list alerts you to system status issues. Click a message to see more detailed messages, and links to possible solutions.
- The **Today's Value** area highlights how Websense filtering is protecting your network from categories commonly considered high risk.

At the bottom of the page, the **Filtering Service Summary** lists the IP address and current status of each instance of Websense Filtering Service associated with the current Policy Server.

Health Summary, Today's Value, and Filtering Service information is visible to all administrators (Super Administrators and delegated administrators) logging on to Websense Manager.

Up to 4 additional charts can be displayed on the page, showing information about Internet usage and filtering activity. WebsenseAdministrator and members of the Super Administrator role with reporting permissions can view these charts, but they may not be visible to delegated administrators, depending on their level of permissions.

- Click any chart to open an investigative report showing related data.
- Anyone with unconditional Super Administrator permissions can change which charts appear on the Today page by clicking **Customize** in the toolbar at the top of the page.

Review recent filtering activity

Use the **Status** > **History** page (accessed by clicking **History** under Status on the Main tab of the left navigation pane) to review filtering activity for the recent past. Depending on your reporting setup, this page may show activity for up to the past 30 days.

At the top of the page, the **Value Estimates** area provides an estimate of time and bandwidth saved due to blocked Internet requests. It also shows the number of sites blocked in categories that are of particular concern to Websense software users.

Up to 4 additional charts can be displayed on the page, showing information about Internet usage and filtering activity. WebsenseAdministrator and members of the Super Administrator role with reporting permissions can view these charts, but they may not be visible to all delegated administrators, depending on their level of permissions.

- Click any chart to open an investigative report showing related data.
- Anyone with unconditional Super Administrator permissions can change which charts appear on the History page by clicking **Customize** in the toolbar at the top of the page.

Verify your Websense filtering setup

The right shortcut pane includes a **Toolbox** that you can use to quickly find out how sites are categorized, how users are being filtered, and other information about your current filtering setup.

Tool	Description
URL Category	Find out how a site is categorized. Enter a URL, and then click **Go**. The site category is displayed. If the URL has been recategorized, the new category is shown.
Check Policy	Determine which policies currently apply to an individual client. (Multiple policies may apply when a user belongs to more than one group.) Enter a fully qualified user name or IP address, and then click **Go**. A list of policies is displayed.
Test Filtering	Find out what happens when a specific client requests a site. First enter a URL, then provide the fully qualified user name or IP address, and then click **Go**. The site category, the action applied to the category, and the reason for the action are displayed.
URL Access	See whether users have attempted to access a site in the past 2 weeks. Enter a URL, and then click **Go**. An investigative report shows whether the site has been accessed, and if so, when, and by whom. You might use this tool after receiving a security alert to find out if your organization has been exposed to phishing or virus-infected sites.
Investigate User	Review a client's Internet usage history for the past 14 days. Enter a user name or IP address, and then click **Go**. An investigative report showing the client's usage history is displayed.

Create reports within Websense Manager

Websense Manager now includes tools for generating reports. There is no need to access separate applications, as long as Websense Manager and the reporting components are installed on a Windows operating system.

The **Reporting** > **Presentation Reports** page replaces the Websense Reporter application. This page presents a list of predefined charts and tabular reports, each showing specific information from the Log Database.

- Run a report from the list as it is defined.
- Copy a predefined report and edit its report filter, specifying which clients, categories, protocols, and actions to include.
- Mark a report as a Favorite to help you find it more quickly in the list.
- Schedule reports to run on a delayed or repeating basis, choosing one or more email recipients.

The **Reporting** > **Investigative Reports** page replaces Websense Explorer for Windows. This page presents a summary bar chart (default shows hits by risk class).

Except that you access this tool from within Websense Manager, it operates like Websense Explorer. For example:

- Drill down into specific details by making selections right on the chart.
- Expand the bar chart to show 2 levels of data.
- Use the flexible detail view to generate and modify your own tabular reports.
- Save a report as a Favorite that can be scheduled to run on a delayed or repeating basis.
- Investigate the Internet activity of a particular user by day or month.

Maintain centralized policy information

In previous versions of Websense software, each Policy Server stored its own client and policy configuration information. In multiple Policy Server environments, the Central Policy Distribution (CPD) and Central Configuration Distribution (CCD) tools provided a way to keep the disparate Policy Servers synchronized.

Now, a centralized **Policy Database** stores client and policy configuration information for multiple Policy Servers.

- The Policy Database is associated with Websense Manager.
- Use Websense Manager to log on to any Policy Server connected to the Policy Database.
- Administrator, client, and policy information added or edited on one Policy Server is available to all Policy Servers connected to the Policy Database.

Information specific to a single Policy Server instance, such as Filtering Service or Network Agent connection information, is still stored separately by each Policy Server.

Back up and restore policy information

The Websense Backup Utility simplifies the process of saving your Websense software settings and policy data and reverting to a specific configuration. Use the utility to:

- Perform an immediate backup or schedule automatic backups of your Websense software.
- Restore your Websense software configuration.
- Import an existing configuration.

The Backup Utility saves and restores:

- Global configuration information, including client and policy data, stored in the Policy Database.
- Local configuration information, such as Filtering Service and Log Server settings, stored by Policy Server.
- Websense component initialization and configuration files.

The Websense Backup Utility is accessed from the command line and should be run on each machine that includes Websense components.

Allow concurrent administrator logons

As in previous versions of Websense software, you can use delegated administration to give specific administrators the ability to maintain policy information or run reports for a defined list of clients.

Now, multiple administrators can log on to the same Policy Server to do policy maintenance or reporting work at the same time.

- Only one administrator at a time can log onto each role with **policy** permissions.
- Multiple administrators can concurrently log on to the same role with **reporting** permissions.

If you try to log on to a role that is currently in use by another administrator with policy permissions, you are given the option to either log on to the selected role with reporting permissions only, or to log on to another role that you are assigned to administer.

Identify conditional Super Administrators

Administrators in the Super Administrator role with policy permissions can be designated as:

- unconditional Super Administrators, with full access to all policy management and configuration settings.
- conditional Super Administrators, with more limited access to configuration settings. Similar to a Remote Administrator in previous versions, conditional Super Administrators can perform most policy management functions, but cannot alter the Filter Lock. Other limitations apply, as well.

Create exceptions to user identification settings

In addition to the transparent user identification and manual authentication options available in previous versions of Websense software, there is now a **selective authentication** option that lets you set specific authentication options for specific IP addresses.

Selective authentication lets you determine whether users requesting Internet access from a specific machine are identified transparently, prompted to log on to the browser (manual authentication), or never prompted for logon credentials. This can be used to:

- Establish different authentication rules for a machine in a public kiosk than for employees of the organization supplying the kiosk.
- Ensure that users of an exam-room computer in a medical office are always identified before accessing the Internet.

Click **Exceptions** on the **Settings** > **User Identification** page to establish specific user identification settings for some machines in your network.

Integrate with the Websense Web Security Gateway

Websense Web Security Gateway takes Websense Web Security filtering to the next level, where, depending on your configuration, you can enable real-time analysis of online files and Web site content. When activated, real-time analysis occurs only for sites not blocked by Websense Web Security.

The available real-time scanning options are dependent on your subscription, and may include both content categorization and security real-time scanning.

- Use **content categorization** to review the content of sites that are not blocked (based on the site's Master Database category and the active policy), and return a category for use in filtering.
- Also take advantage of up to 3 security real-time options (based on your subscription):
  - **Content scanning** looks at Web content to find security threats such as phishing, URL redirection, Web exploits, and proxy avoidance.
  - **File scanning** inspects file content to determine a threat category, such as viruses, Trojan horses, or worms.
  - **Content stripping** removes active content from requested Web pages.

Getting help

To help you get the most from your Websense software, the new, integrated Websense Manager includes 5 types of Help:

1	Most pages include a brief, expandable and collapsible overview. Initially, these About boxes are collapsed for all administrators. Super Administrators can change this behavior so that the boxes are opened by default for all administrators. • If this page overview box is hidden, click About in the toolbar to show it. • To hide an About box, click Close. The About button is not available on the Settings pages. Brief overview information appears at the top of each Settings page, and cannot be hidden.
2	An icon accompanies many important product features. Position your mouse over this icon for a brief explanation of the feature.
3	For complex or advanced tasks, help text appears directly on the page, providing usage guidelines or other pointers for using a tool or field.

4	Detailed information about each page in Websense Manager, often including step-by-step usage instructions, is also available. Click **Help** in the title bar, and then select **Explain This Page**.
5	To browse the Websense Manager Help system, click **Help**, and then select **Contents**. The Help system is displayed in a separate browser window. For a printer-friendly version of the Help system in PDF format, click the Adobe PDF icon near the top, right corner of any Help page. (Adobe Reader must be installed to open this file.)

If you are unable to find the information that you need from within Websense Manager, consult the Websense Support Portal. Here, you'll find an extensive Knowledge Base, a variety of tips and video tutorials, product documentation and technical papers, and other tools to answer your questions and help you find solutions to problems.

2 Where do I find...?

The upgrade process preserves your existing client, policy, and Websense software configuration information. Changes to Websense Manager, however, mean that some common features and functions have moved or been renamed.

Use this section to locate your accustomed tools, features, and functions as you become more familiar with Websense Manager.

To get started, select the tool or function that you want to locate:

My Global policy

Your ***Global** policy has been renamed **Default**.

- It still enforces the same filtering settings on the same schedule.
- It still filters all clients whenever no other policy applies.

To verify that your filtering settings have not changed, go to **Policy Management > Policies**, and then click **Default**. Click a time period in the schedule to see which filters (formerly category sets, protocol sets, and yes lists) are enforced by the policy.

Important

The **Default** policy should cover all time periods, 24 hours a day, 7 days a week. If your Global policy contained gaps, you are not prompted to provide complete coverage. When you edit the Default policy, however, you will not be permitted to save changes until all gaps are filled.

My Default Settings category and protocol sets

Your **Default Settings** category and protocol sets have been renamed. They are now the **Default** category and protocol filters.

This is a rename only. It does not affect your filtering settings.

To verify the settings enforced by the Default category and protocol filters, go to **Policy Management > Filters**, and then click the filter name in the appropriate list.

My yes lists

Yes lists have been renamed **limited access filters**. Category, limited access, and protocol filters are all managed via the **Policy Management > Filters** page.

To view or edit the contents of a limited access filter, click its name in the **Limited Access Filters** list.

My custom URLs

Custom URLs now fall under the general heading of **Filter Components**.

To view and edit **recategorized URLs** (formerly Custom URLs/Recategorized), go to **Policy Management > Filter Components** and click **Edit Categories**. Select a category to see the recategorized URLs in that category.

To view and edit **unfiltered URLs** (formerly Custom URLs/Not Filtered), go to **Policy Management > Filter Components** and click **Unfiltered URLs**. Existing URLs, IP addresses, and regular expressions currently defined as unfiltered URLs appear in the Permitted Sites list.

My directory objects

In Websense Manager, the general heading **Directory** has replaced Directory Objects. This umbrella term includes, users, groups, domains, and organizational units defined in a supported directory service.

To view, add, or edit these clients, go to **Policy Management > Clients**, and then expand the **Directory** tree.

Websense Explorer

Websense Explorer for Windows has been replaced by investigative reports, which is accessed directly in Websense Manager, as long as Websense Manager and the reporting components are installed on a Windows operating system. Click **Reporting > Investigative Reports** in the left navigation pane to create, schedule, and run reports in much the same way you did with Websense Explorer for Windows.

Websense Explorer for Unix has been replaced by Websense Explorer for Linux. This is a separate product that must be installed on a Linux operating system. It is accessed via a Web browser, but does not operate within the Websense Manager interface. See the Websense Explorer for Linux *Administrator's Guide* for assistance.

Websense Reporter

Websense Reporter has been replaced by presentation reports, which is accessed directly in Websense Manager, as long as Websense Manager and the reporting components are installed on a Windows operating system. Click **Reporting > Presentation Reports** in the left navigation pane to define custom report filters, schedule reports, and run reports with this tool.

My reports

A large number of predefined report templates were provided as part of Websense Reporter. Many of the templates provided substantially similar information, with only slight variations of format or preselected content (users, categories, and so forth).

For presentation reports, the templates have been streamlined so that a particular format and content is presented as a single predefined report. You can copy any predefined report and edit the report filter for the copy to select a different combination of clients, categories, protocols, and actions (formerly called dispositions).

Following is a list of reports from the v6.3.x Reporter application, and the presentation report name for the v7 equivalent.

v6.3.x Report	v7.0 Report
Detail of Destinations by User	User Activity Detail (also replaces the previous User Activity Detail report)
Top Categories by Blocked Internet Access	Top Blocked Categories by Requests (without % figures)
Dispositions by Occurrences	Top Filtering Actions by Requests
Top Categories by Internet Browse Time	Top Categories by Browse Time
Top Categories by Bytes Transferred	Top Categories by Bandwidth
Top Categories by Hits	Top Categories Visited
Top Groups by Internet Browse Time	Top Groups by Browse Time
Top Groups by Bytes Transferred	Top Groups by Bandwidth
Top Groups by Hits	Top Groups Activity by Requests
Top Destinations by Internet Browse Time	Top Sites by Browse Time (without category)
Top Destinations by Bytes Transferred	Top Sites by Bandwidth (without category)
Top Destinations by Hits	Top Sites Visited (without category)
Top Users by Internet Browse Time	Top Users by Browse Time
Top Users by Bytes Transferred	Top Users by Bandwidth
Top Users by Hits	Top Users Activity by Requests
Corporate Risk Summary	(to be added)
Top Destinations by Blocked Internet Access	Top Blocked Sites by Requests (without % and category)
User Activity Detail	User Activity Detail (also replaces the previous Detail of Destinations by User report)
Top Groups by Blocked Internet Access	Top Blocked Groups by Requests (without %)
Top Protocols by Blocked Internet Access	Top Blocked Protocols by Requests (without %)
Protocols by Bytes Transferred	Top Protocols by Bandwidth
User Destination Summary	User Activity Summary (also replaces previous Summary of Destinations by Date and User report)

v6.3.x Report	v7.0 Report
Top Users by Blocked Internet Access	Top Blocked Users by Requests
Summary of Destinations by Date and User	User Activity Summary (also replaces User Destination Summary report)

The following reports, which were available in Websense Reporter v6.3.x, can be substantially recreated in the summary or detail view of investigative reports. Cost and percent values, however, are not supported in v7.

- Detail of Bytes Transferred by Category
- Detail of Bytes Transferred by User
- Detail of Bytes Transferred by Group
- Detail of Users by Category
- Detail of Groups by Category
- Detail of Full URL Destinations by Category and Date
- Detail of Bytes Transferred by Protocol
- Detail of Bytes Transferred by Date and Protocol
- Detail of Destinations by Group
- Categories by Bytes Transferred
- Group Activity Detail—(multiple)
- Detail of Groups by Protocol
- Summary of Groups by Protocol
- Protocol Analysis – Bandwidth
- Protocol Analysis – Hits
- Summary of Categories by Hits
- Summary of Internet Browse Time by Category
- Summary of Internet Browse Time by Destination
- Group Bandwidth Summary
- Group Internet Browse Time Summary
- Group Destination Summary
- User Bandwidth Summary
- User Internet Browse Time Summary
- Summary of Top Destinations by Hits
- Details of Users by Protocol
- Summary of Users by Protocol
- Summary of Bytes Transferred by Category
- Summary of Bytes Transferred by Date and Category
- Summary of Bytes Transferred by User
- Summary of Bytes Transferred by Date and User
- Summary of Bytes Transferred by Group
- Summary of Bytes Transferred by Date and Group
- Summary of Categories by Date and User
- Summary of Categories by Date and Group
- Summary of Destinations by Group
- Summary of Destinations by Date and Group
- Summary of Destinations by Time of Day and Group—(not summary level)
- Summary of Bytes Transferred by Protocol
- Summary of Bytes Transferred by Date and Protocol
- Summary of Top Destinations by User
- Summary of Top Destinations by Bytes Transferred and Category
- Summary of Top Destinations by Bytes Transferred
- Summary of Destinations by User
- Summary of Destinations by Time of Day and User—(not summary level)
- Internet Browse Time Total

Real-Time Analyzer

Websense Real-Time Analyzer has been discontinued. Up-to-the minute information on selected filtering activity can be viewed on the default **Status > Today** page. Unconditional Super Administrators can customize the reports displayed.

Additionally, the Today page provides alerts for important system activities, such as subscription concerns, Master Database download problems, and Websense components that are not running, among others. The Filtering Services Summary on the Today page gives status for each Filtering Service associated with the active Policy Server.

The **Status > History** page displays some of the same information for a longer time period (up to 30 days). Additionally, you can use the **Reporting > Presentation Reports** and **Reporting > Investigative Reports** pages to generate a variety of reports to help you discover Internet usage trends for your environment.

My server settings

The Websense software configuration options previously accessed via the Server > Settings menu in Websense Manager are now accessed by clicking the **Settings** tab in the left navigation pane.

3 How Do I...?

Although there have been some significant changes to the Websense Manager interface, the basic steps involved in performing most filtering, reporting, and configuration tasks are not dramatically different than in previous versions.

Use this section as a quick reference to help you resume your accustomed tasks in the new Websense Manager interface.

Download the Master Database

WebsenseAdministrator and members of the Super Administrator role can manually initiate a download of the Websense Master Database at any time from the **Status** > **Today** page in Websense Manager.

1. Click **Database Download** in the toolbar at the top of the Today page.

A list of Filtering Service instances associated with the current Policy Server is displayed.

2. Click the **Update** button to the right of any Filtering Service IP address, or click **Update All** to download a Master Database update on all Filtering Service machines.
3. Click a Filtering Service IP address to view the progress of the download, or click **Close** to return to the Today page.

If you are logged on to Websense Manager with policy permissions when the Master Database update adds or removes categories or protocols, the category or protocol changes are not shown in Websense Manager until you log off and log on again.

Configure automatic downloads on the **Settings** > **Database Download** page.

Add clients

Use the **Policy Management** > **Clients** page to add clients to Websense Manager.

1. Click **Add** (below the Clients list).
2. Identify the clients that you want to add:
   - If you have configured Websense software to communicate with your network directory service, browse the **Directory** tree to locate users, groups, or domains (OU) to add as clients.

     If you are using an LDAP directory service, you can also use **Search** to identify user, group, or domain (OU) clients.
   - To add a single machine in your network as a client, enter the IP address or host name of the machine under **Computer**.
   - To add a group of machines with contiguous IP addresses as clients, enter the starting IP address and ending IP address under **Network**.
3. Click the appropriate right arrow (>) button to add the clients to the **Selected** list.
4. Click **OK** to cache your changes and return to the Clients page. Changes are not implemented until you click **Save All**.

Create a policy

Use the **Policy Management** > **Policies** page to add policies in Websense Manager.

1. Click **Add** below the list of policies.
2. Enter a unique **Policy name** (maximum 50 characters) for the new policy.
3. Enter a **Description** (maximum 255 characters) for the policy. This should clearly state the policy's purpose to help with maintenance over time.
4. If you want to use an existing policy as the basis for the new policy, mark **Base on existing policy**, and then select a policy from the drop-down list.

5. Click **OK** to cache your changes and go to the Edit Policy page.
6. Use the Edit Policy page to make changes to the policy schedule and the filters enforced by the policy.

   Go to **Help > Explain This Page** on the Edit Policy page for detailed instructions.
7. When you are finished making changes, click **OK** to cache your changes and return to the Policies page. Changes are not implemented until you click **Save All**.

Assign a policy to clients

There are 2 ways to assign policies to clients:

- On the **Policy Management** > **Policies** > **Edit Policy** page for the policy you want to assign to clients, click **Apply to Clients** in the toolbar at the top of the page. Select one or more clients from the tree, and then click **OK**.
- On the **Policy Management** > **Clients** page, select one or more clients in the tree, and then click **Edit**. Under Policy, click **Change**, and then select a new policy from the drop-down list. When you are finished, click **OK**.

When you are finished assigning policies to clients, click **Save All** in the right shortcut pane to save and implement your changes.

Verify that the correct policy is applied

1. In Websense Manager, click **Check Policy** in the right shortcut pane.
2. Identify the client whose filtering policy you want to verify:
   - For users, groups, domains, and organizational units, enter the fully qualified distinguished name of the user, or click **Find User**.

     If you are using an LDAP-based directory service, clicking Find User gives you the option to either browse or search the directory.
   - For computer clients, enter an IP address.
3. Click **Go**.

A pop-up window displays the policy currently applied to the client.

Generate a presentation report

Use the **Reporting** > **Presentation Reports** page to generate a presentation report.

1. Highlight the report of interest.
2. Click **Run**, and then select the dates to include and the output format.

3. Click **Run** again to generate the report. The finished report appears in the Websense Manager content pane if you chose HTML output. Otherwise, you have the option to open the report in the appropriate application (Adobe Reader or Microsoft Excel) or save it to disk.

To select a different combination of data for the report:

1. Highlight a predefined report, and then click **Copy**.
2. Highlight the copy, and then click **Edit Report Filter**.
3. Fill in the tabs of the **Edit Report Filter** page to select exactly the users, categories, protocols, and actions to be included.
4. Choose whether to just save the new report definition for future use, save and run the report immediately, or save and schedule it to run on a delayed or repeating basis.

To schedule presentation reports, click **Scheduler** at the top of the Presentation Reports page. Then, fill in the tabs of the **Scheduler** page to define the job.

Generate an investigative report

The **Reporting** > **Investigative Reports** page displays a bar chart showing hits by risk class. Since this page is virtually identical to the main page in Websense Explorer for previous versions, use the familiar techniques to generate a report.

- Click a risk class name in the left column, and then choose **Categories**, for example, to show information for all the categories associated with the selected risk class.
- Make selections in the gray bar above the chart to create a multi-level report, showing, for example, the top 5 users in each of the top 10 categories.
- Click a bar to generate a detail report of the data for the selected bar.
- Click **Favorite Reports** to save the current report as a Favorite, and access scheduling options.
- Click **Outliers** to find the users whose Internet usage is statistically different from others in the organization.

Create or edit a custom category

Use the **Policy Management** > **Filter Components** > **Edit Categories** page to create and modify custom categories.

The existing categories, both Websense-defined and custom, are listed in the left portion of the content pane. To see current custom settings associated with a category, or to create new custom definitions, first select a category from the list.

To see a list of all custom URLs, keywords, and regular expressions associated with all categories, click **View All Custom URLs / Keywords** in the toolbar at the top of the page.

- To create a new category within the selected parent category, click **Add**. You must select a parent category to enable the Add Category function.

  To remove an existing custom category, select the category, and then click **Delete**. You cannot delete Websense-defined categories.
- To change the name or description of a custom category, click **Rename**.
- To change the filtering action (Permit, Block) associated with a category in all category filters, click **Override Action**.

Recategorize a URL

1. In Websense Manager, do either of the following:
   - Click **Recategorize URL** in the right shortcut pane.
   - Go to **Policy Management > Filter Components**, and then click **Edit Categories**.
2. Select a category from the list. Category information, including a list of recategorized URLs and keywords associated with the category, appears to the right of the category tree.
3. Click **Add URLs** in the Recategorized URLs box.
4. Enter the URLs or IP addresses that you want to associate with the selected category, one per line.
5. Click **OK** to return to the Edit Categories page, and then click **OK** again to cache your changes. Changes are not implemented until you click **Save All**.

Create an unfiltered URL

1. In Websense Manager, do either of the following:
   - Click **Unblock URL** in the right shortcut pane.
   - Go to **Policy Management > Filter Components**, and then click **Unfiltered URLs**.
2. Under **Enter one URL or IP address per line**, list the URLs or IP addresses of sites that you want to define as unfiltered URLs, and then click the right arrow (>) button to move them to the Permitted sites list.
3. Select a **Category** for each URL in the Permitted sites list.
4. Click **OK** to cache your changes. Changes are not implemented until you click **Save All**.

Define keywords

1. In Websense Manager, go to **Policy Management > Filter Components** and click **Edit Categories**.
2. Select a category in the Categories tree. The right portion of the screen displays recategorized URLs and keywords currently associated with the category.
3. Under Keywords, click **Add Keywords**.
4. Enter one keyword per line. Click **Test** to verify that a keyword matches the intended strings.
5. When you are finished adding keywords, click **OK** to return to the Edit Categories page.
6. Click **OK** again to cache your changes. Changes are not implemented until you click **Save All**.

To block sites based on keywords, you must also:

- Make sure that keyword blocking is enabled globally. Go to **Settings > Filtering**, and then enable **Keyword search options** under General Filtering.
- Enable keyword blocking for the category in an active category filter.

Work with file types

1. In Websense Manager, go to **Policy Management > Filter Components** and click **File Types**.
2. Select a file type from the list to view file extensions associated with the type, or click **Add File Type** to define a new file type.

   To add file extensions to an existing file type, click **Add Extensions**.

To block sites based on file type, enable file type blocking for individual categories in an active category filter.

Create Websense accounts for administrators

Websense user accounts let you define a user name and password that are used exclusively for logging on to Websense Manager. Administrators can use these accounts, instead of their network directory accounts, to access Websense Manager.

Websense user accounts are especially helpful in distributed environments, where delegated administrators may authenticate to different directory services. For more information, see *Allow administrators to log on using network accounts*, page 27.

To create Websense user accounts:

1. Go to **Policy > Delegated Administration**.

2. Click **Manage Websense User Accounts** in the upper left corner.
3. Click **Add**, and then enter the user name and password.
4. Click **OK** to cache your changes. Changes are not implemented until you click **Save All**.

After the user account has been added, add that user as an administrator in the Super Administrator role, or any delegated administration role.

Allow administrators to log on using network accounts

If administrators are to access Websense Manager by entering their network logon credentials, you must configure a logon directory service to use for authentication.

The logon directory service must be the one through which all administrators authenticate, or it must have a trusted relationship with their directory services.

Depending on your network environment, these logon directory settings may closely resemble or duplicate the information on the **Settings > Directory Services** page. It may be helpful to make a note of your existing Directory Services settings before configuring Logon Directory settings.

1. Go to **Settings > Logon Directory**.
2. Configure the directory service that authenticates administrators, or has a trusted relationship with those directory services.
3. Click **OK** to cache your changes. Changes are not implemented until you click **Save All**.

Move clients from one role to another

Moving a client from one delegated administration role to another requires unconditional Super Administrator permissions. You must first delete the client from the current role. Then, you can add that client to the new role.

Some clients cannot be deleted directly from the managed clients list (Delegated Administration > Edit Role). This occurs when the administrator has applied a policy to the client on the Clients page. It also occurs if the administrator has applied a policy to one or more members of the network, group, domain, or organizational unit to be moved.

In this situation, the unconditional Super Administrator should:

1. Go to the **Role** list in the toolbar, and select the role from which managed clients are to be deleted.
2. Go to **Policy Management > Clients** to see a list of all the clients to which the delegated administrator has explicitly applied a policy.

This may include both clients that are specifically identified on the managed clients list for the role and clients who are members of networks, groups, domains, or organizational units on the managed clients list.

3. Delete from the Clients page any clients to be deleted from the role, and individual members of any networks, groups, domains, or organizational units to be deleted from the role.
4. Click **OK** to cache your changes, and then click **Save All** to implement the changes.
5. Go to the **Role** list in the toolbar, and select the **Super Administrator** role.
6. Go to **Policy Management > Delegated Administration** and click the role name from which the managed clients are to be deleted. The **Edit Role** page appears.
7. Delete the appropriate clients from the managed clients list.
8. Click **OK** to cache your changes.
9. On the Delegated Administration page, edit the new role for these clients and add them as managed clients.
10. Click **OK** to cache your changes. Changes are not implemented until you click **Save All**.

Manage audit log settings

Super Administrators can view an audit trail of which administrators have accessed Websense Manager and the changes they have made by clicking **Status > Audit Log**.

When the page opens, the most recent records appear. Use the scroll bar and the paging buttons above the log to view additional records.

Audit records are saved for 60 days, and then deleted from the log. Unlike previous releases, you do not have to configure any size or time limits for saving audit records.

Use the export option if you need to preserve the records for longer than 60 days. (Exporting does not remove records from the audit log.)