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WEBSENSE INTEGRATION SERVICE

Reporting Installation and Configuration
for NetCache Appliances

v7

Websense Integration Service Reporting Installation and Configuration for NetCache Appliances

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Websense Reporting for NetCache Appliances

When running a NetCache appliance, you can choose the Websense Master Database of URLs as the basis for Internet filtering. The Websense Master Database classifies millions of URLs into categories for filtering.

This requires that you configure certain NetCache settings, to enable regular downloads of the Websense Master Database, and establish filtering policies.

You also can install the Websense Integration Service and Websense reporting tools on a Windows server to get summary and detail reports of the Internet activity in your network, and to see how the Websense Master Database combines with your NetCache appliance to protect your network from security threats, legal liability, and unproductive Internet usage.

This document provides instructions for

- ◆ Installing the Websense reporting tools
- ◆ Configuring the NetCache appliance to use the Websense Master Database, and download regular updates
- ◆ Configuring the NetCache appliance to send records of Internet filtering activity to the Websense Log Server
- ◆ Use Websense reporting tools to understand Internet usage and the value of Internet filtering

Hardware and software requirements

The specific hardware requirements vary according to your network size and volume of Internet traffic. For complete information, see the Websense *Deployment Guide*, available at www.websense.com/docs, provides hardware and software requirements. Specifically, review the recommendations for reporting installations, which is the information that applies to this environment.

Software requirements are listed below.

- ◆ **Operating Systems supported:**
 - Windows Server 2003, R2 (Standard or Enterprise)
 - Windows Server 2003, SP1 (Standard or Enterprise)
 - Windows Server 2003 (Standard or Enterprise)

- ◆ **Database engines supported:**
 - Microsoft SQL Server 2005 SP2 (Workgroup, Standard, Enterprise, or 64-bit edition) (recommended)
 - Microsoft SQL Server 2000 SP 4
 - Microsoft SQL Server Desktop Engine (MSDE) 2000 SP 4 (suitable for smaller networks) MSDE is available for download from www.websense.com/article.asp?article=3492&p=12 for details.
- ◆ **Web browsers supported:** necessary for using Websense Manager
 - Internet Explorer v7
 - Mozilla Firefox v2
- ◆ **Adobe Acrobat.** Necessary for viewing reports generated in PDF format.
- ◆ **Microsoft Excel:** Necessary for viewing reports generated in XLS format.

Websense component installation

Several components are installed to support Websense reporting from a NetCache appliance.

- ◆ **Policy Broker and Policy Database:** Manage and store configuration settings and client data.
- ◆ **Policy Server:** Enables communication between the NetCache appliance and the Websense Integration Service.
- ◆ **User Service:** Populates user-related tables in the Websense Log Database.
- ◆ **Websense Manager:** Provides a Web-based interface for generating reports, configuring directory service communication, and defining delegated administration roles that allow other administrators to report on specific clients.
- ◆ **Log Server:** Receives records of Internet activity from the NetCache appliance, and updated lists of category, protocol, and risk class names from the Websense Master Database. Sends this information to the Log Database.
- ◆ **Log Database:** Stores and manages information sent by Log Server, and provides the information requested for reports.
- ◆ **Apache Web Server:** Enables reporting functionality.
- ◆ **Apache Tomcat Server:** Enables Websense Manager functionality.
- ◆ **Websense Integration Service:** Receives Master Database category information from your NetCache appliance and passes it to the Websense Policy Broker, which sends it to the Log Database for reporting.

Use the following steps to install Websense components on a Windows server.

1. Make sure a supported database engine (see *Hardware and software requirements*, page 5) is installed in the network.
2. Log on to the installation machine with local and domain administrator privileges.
3. Download the v7 installer for the NetCache appliance from www.websense.com.
4. Extract the files and the installer launches automatically.

5. Follow the onscreen instructions. As you proceed, consider the following:
 - a. **Database engine location:** Enter the IP address or name of the machine running either Microsoft SQL Server or Microsoft SQL Server Desktop Edition (MSDE). Both the SQL Server and the SQL Server Agent must be running when you install the Websense software.
 - b. **Database access:** Websense, Inc., recommends using a SQL database account with MSDE. The account must have administrator rights to configure the Log Database.
 - c. **IP Address:** If the installation machine has multiple IP addresses, the installer asks you to select the IP address for Websense Log Server to use.
 - d. **Integration Service Port:** Enter a port number for the Websense Integration Service communication with your appliance, or accept the default, 55080.
Make a note of the port you assign here. You will need it when you configure the appliance.
6. When the installation is complete, click **Finish**.
7. Configure the appliance for filtering. See [Configure NetCache for filtering, page 7](#).
8. Configure the appliance for reporting. See [Configure NetCache for Websense reporting, page 9](#).
9. Configure Websense reporting. See [Configuring Websense Software for Reporting, page 11](#).

Removing Websense components

If you need to move the reporting service to another machine, first uninstall Websense components, as follows.

1. Stop the Websense Integration Service.
 - a. Select **Start > Settings > Control Panel > Administrative Tools > Services**.
 - b. In the **Services** pane, right-click the **Websense Integration Service**.
 - c. Select **Stop**.
2. Go to **Start > Settings > Control Panel > Add or Remove Programs**.
3. Select **Websense Web Security / Web Filter** from the list.
4. Follow the onscreen instructions to remove selected components or the entire installation.
5. Install the Websense components on a new machine. See [Websense component installation, page 6](#).

Configure NetCache for filtering

You must configure the NetCache appliance to download the Websense Master Database, and to include category block and permit rules and URL exceptions, which determine the way Internet requests are filtered by NetCache.

1. Open the NetCache Web-based Manager, and select the **Setup** tab.
2. In the left navigation page, open **Access Control > Websense**.
3. Open the **General** tab.
 - a. Mark the **Websense Enable** check box.
(CLI option: config.wsfilter.enable)

- b. Enter a URL in the **Redirect Blocked Requests to This URL** field.
(CLI option: config.wsfilter.redirect)

This URL should provide with information about the organizations Internet use policy and reasons why the requested site was blocked.
 - c. Use the **Allow URL on Failure Enable** check box to indicate how Internet access should be handled if Websense filtering is unavailable, such as when there is insufficient memory or an expired subscription.
(CLI option: config.wsfilter.allow_on_failure)
 - Mark the check box to permit all Internet requests when Websense filtering is unavailable.
 - Clear the check box to block all Internet requests when Websense filtering is unavailable.
 - d. Click **Commit Changes** to save your updates.
4. Open the **Categories** tab.
(CLI option: config.wsfilter.categories)
 - a. Mark the check box for blocked categories. Clear the check box for permitted categories.
 - b. Click **Commit Changes** to save your updates.
5. Open the **URL Exceptions** tab.
 - a. Enter URLs that are permitted regardless of the block rule set in the **Categories** tab.
(CLI option: ACL lists)

For example, if you block news sites in the **Categories** tab but want to permit http://cnn.com, enter http://cnn.com as an exception to the rule.
 - b. Click **Commit Changes** to save your updates.
6. Open the **Schedule URL Database Updates** tab.
 - a. Mark the **Websense Download Enable** check box to enable automatic downloading of the Websense Master Database.
(CLI option: config.wsfilter.download.enable)
 - b. Enter your **Websense Subscription Key**.
(CLI option: config.wsfilter.cust_id)
 - c. **Schedule** the frequency for downloading the Websense Master Database by checking the days of the week and setting the time of day for the download. Optionally, add a second time of day for downloading the database.
 - d. Make sure the **Websense Database Download Server** is entered as **download.websense.com**.
(CLI option: config.wsfilter.download.url)
 - e. Click **Commit Changes** to save your updates.
7. On the Schedule URL Database Updates tab, click a button to start an immediate database download:
 - **Update URL Database** downloads all updates to the existing Websense Master Database.
(CLI option: config.wsfilter.download_now)
 - **Update Full URL Database** downloads the entire Websense Master Database.
(CLI option: config.wsfilter.download_full_now)

Configure NetCache for Websense reporting

To generate reports of Websense filtering activity, you must configure the NetCache appliance to communicate with Log Server and Websense Integration Service:

1. Open the NetCache Web-based Manager, and select the **Setup** tab.
2. In the left navigation pane, select **Access Control > Websense**.
3. Open the **General** tab.
4. Mark the **Log Server Enable** check box.
(CLI option: `config.wsfilter.reporter.enable`)
5. In the **Log Server IP Address** field, enter the IP address of the machine running the Log Server and Websense Integration Service.
(CLI option: `config.wsfilter.reporter.server`)
6. Enter **55805** as the **Log Server Port**.
(CLI option: `config.wsfilter.reporter.log_server_port`)
7. In the **Integration Service Port** field, enter the port selected during installation for the Websense Integration Service to communicate with the NetCache appliance (default 55080).
(CLI option: `config.wsfilter.reporter.integration_service_port`)
8. Click **Commit Changes** to save these changes.

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Configuring Websense Software for Reporting

After installing Websense components for your NetCache appliance integration, you should review the Log Server Configuration utility to verify that the settings meet your needs. Additionally, you must configure the following settings in Websense Manager to enable reporting features.

- ◆ Log Database to assure that database maintenance tasks are performed according to your needs and schedule.
- ◆ Reporting preferences to enable distribution of scheduled reports and self-reporting
- ◆ Directory services in order to generate reports on user and group activities.
- ◆ Delegated administration roles if you plan to permit other members of the organization to generate reports on specific groups of employees.

When this configuration is complete, you can view high-level reports on the Status > Today and Status > History pages, as well as generate and schedule both presentation reports and investigative reports.

Verify Log Server Configuration

The Log Server Configuration utility lets you configure many aspects of Log Server operation. Verify that the default settings are appropriate for your organization.

This utility is accessed from the installation machine by going to the Windows Start menu and selecting **Programs > Websense > Utilities > Log Server Configuration**.

The utility consists of 5 screens, selected by clicking the tabs at the top.

- ◆ **Connection** presents options for creating and maintaining a connection between Log Server and other Websense components.
- ◆ **Database** lets you configure how Log Server works with the Log Database.
- ◆ **Settings** lets you manage the log cache file creation options, and specify whether Log Server tracks the individual files that make up each Web site requested, or just the Web site.
- ◆ **Consolidation** lets you enable consolidation and set consolidation preferences. Consolidation decreases the size of your Log Database by combining Internet requests that share their domain name, category, keyword, action, and user/computer. Consolidation increases reporting speed while decreasing precision.
- ◆ **WebCatcher** lets you choose whether to submit unrecognized URLs and security URLs to Websense, Inc., for analysis and possible inclusion in future Master Database updates.

For complete details on the settings in the Log Server Configuration utility, click the Help button in the utility window. This information can also be found in the Websense Manager Help.

Open Websense Manager

Open Websense Manager by clicking the Websense icon on the desktop of the installation machine. Alternatively, you can open it from a browser on any computer in the network.

1. Enter the following in the address bar: **https://<IP address of installation machine>:9443/mng**
2. Enter **WebsenseAdministrator** as the user name, and the password that you established during installation.
3. Use the pages in Websense Manager to configure key settings to enable reporting, as described in *Configure Settings*.

Configure Settings

In Websense Manager, use the Settings tab to set key configuration options.

1. In the left navigation pane, click **Settings**.
2. Click **Reporting > Log Database**.
Use the options on the **Log Database** page to configure database rollover options, maintenance activities and schedule, and other crucial database functions. Click **Help > Explain the Page** for details.
3. On the Settings tab, go to **Reporting > Preferences**.
Use the **Preferences** page to configure the email server to use for distributing scheduled reports. You can also use this page to enable network users to generate reports of their own Internet activity (self-reporting). Click **Help > Explain the Page** for details.
4. On the Settings tab, go to **General > Directory Service**.
Use the Directory Service page to configure that directory service that authenticates network users. This information is required for:
 - Generating reports that identify the users, groups, domains, or organizational units associated with Internet activity. If this information is not provided, only IP addresses are available to identify the origin of Internet requests.
 - Enabling network users to log on and generate reports on their own Internet activity (self-reporting).Click **Help > Explain the Page** for details.
5. On the Settings tab, go to **General > Logon Directory**.
Use the **Logon Directory** page to configure the directory service that authenticates all administrators who will access Websense Manager with their network logon credentials. Click **Help > Explain the Page** for details.
Be sure to notify those administrators of the address for accessing Websense Manager from their browser, and that they should use their network credentials to log on.
6. Click **Save All** to implement the changes cached on each page.

Define delegated administration roles

Delegated administration allows you to create an administrative role for a logical group of clients, and assign administrators who can generate reports for those clients.

There are 2 aspects to defining delegated administration roles:

First, decide how administrators will access Websense Manager to generate reports.

- ◆ Configure the Logon Directory, as described above. Then, inform the administrators of the address for accessing Websense Manager from their browser, and that they should use their network credentials to log on.
- ◆ Create special Websense user accounts, defining a user name and password that each administrator uses only to access Websense Manager. To create these accounts:
 1. In Websense Manager, click the **Main** tab in the left navigation pane.
 2. Go to **Policies > Delegated Administration**.
 3. Click the **Manage Websense User Accounts** button above the Delegated Administration page.

Click **Help > Explain This Page** on any page for details on that page.

After configuring the Logon Directory page or creating Websense user accounts, create delegated administration roles. For each role, assign administrators and the clients they can report on.

Following is the general procedure for configuring roles. For detailed instructions, click **Help > Explain This Page**, as needed.

1. In Websense Manager, go to **Policies > Delegated Administration**.
2. Click **Add**, and then enter the role name and description.
3. Click **OK** to cache the role name and open the Edit Role page.
4. In the **Administrators** area, add the individuals who will be generating reports on the clients assigned to this role.
5. In the **Managed Clients** area, add the users, groups, computers, and networks the administrators in this role can report on.
6. In the **Reporting Permissions** area, select the reporting options available to all administrators in this role.

If you did not add any managed clients, be sure to select **Report on all clients** in this area to assure that delegated administrators reports are not empty.
7. Click **OK** to cache your changes. Changes are not implemented until you click **Save All**.

Generate and view reports

Websense Manager can provide several reporting tools for use in evaluating the effectiveness of your filtering policies. For detailed information on using these reporting features, use the **Help** menu in Websense Manager.

The **Today** page appears first when you open Websense Manager. It shows the operating status of Websense software, and can display charts of filtering activities in the network since midnight.

This page also includes a section called Health Alert Summary that presents messages about various elements of the Websense software. Additional information about these messages can be found on the **Alerts** page. Since your NetCache integration does not use all the features available in a full Websense Web Security or Websense Web Filter installation uses, there may be several messages in this area.

Some messages can be hidden via the Alerts page. However, messages about the missing Filtering Service and missing subscription key cannot be hidden. These items are not needed for your NetCache integration, so there is no cause for concern.

The **History** page shows charts of filtering activities in the network for up to 30 days, depending on the amount of information in the Log Database. These charts do not include today's activities.

The **Presentation Reports** page offers a list of report definitions. Some are tabular reports, some combine a bar chart and a table. To generate a presentation report:

1. Select a report from the list.
2. Click **Run**.
3. Select the date range.
4. Click **Run Now**.

In addition to generating predefined charts, you can copy them and apply a customized report filter that identifies specific clients, categories, protocols, or actions to include. Mark report definitions that you use frequently as Favorites to make them easier to find. You can also schedule any presentation report to run at a particular time or on a repeating cycle.

The **Investigative Reports** page lets you browse through log data interactively. The main page shows a summary-level bar chart of activity by risk class. Click the different elements on the page to update the chart or get a different view of the data.

- ◆ Click the risk class name and then select a finer level of detail related to that risk class. For example, you might choose to show activity by user for the Legal Liability risk class.
- ◆ Click a user name on the resulting chart to view more detail about that user.
- ◆ Choose a different option from the **Internet use by** list to change the summary bar chart.
- ◆ Fill in the fields just above the bar chart to display two levels of information at one time. For example, starting with a summary chart of categories, you might choose **10, User**, and **5** to display activity for the top 5 users in the top 10 categories.
- ◆ Click a bar or number to open a detail report for that item (risk class, category, user, or other).
- ◆ Click **Favorite Reports** to save a particularly useful report format for future use, or to generate a previously saved Favorite.

Other Websense Manager options

Websense Manager includes many other features that are used with a full Websense Web Security or Websense Web Filter installation. Only the features described above are effective when reporting on Internet activity filtered by your NetCache integration. If you make changes in other areas of Websense Manager, they will be ignored.

3 | Troubleshooting

Use this section to find solutions to common issues with the NetCache integration before contacting Technical Support.

The Websense Web site features an extensive Knowledge Base, available at www.websense.com/global/en/SupportAndKB/. Search for topics by keyword or reference number, or browse the most popular articles.

Internet requests are not being logged

If reports are empty, the NetCache appliance may not be configured correctly to communicate with the Log Server. Ensure that the Log Server IP address and port settings are correct. In the NetCache Web-based Manager, go to Access Control > Websense, and click the **General** tab to define logging parameters (see *Configure NetCache for Websense reporting*, page 9).

Also, go to the Websense installation machine and verify that the Log Server is running via the Windows Services dialog box.

Reports do not show category information

NetCache is not configured correctly for communication with the Websense Integration Service. Check the Integration Service IP address and port settings to make sure they are correct. See *Configure NetCache for filtering*, page 7, for more information.

SQL user account cannot create SQL Server Agent jobs

If you are using Microsoft SQL Server 2005 as your database engine and receive an error stating that the SQL user account does not have permission to create SQL Server Agent jobs:

1. Exit the installer.
2. Use the Microsoft SQL Server Management Studio to update the permissions to provide membership in the **public** and **SQLAgentUserRole** roles in the msdb database, and the **DBCreator** fixed server role.

For instructions on setting these permissions, go to www.websense.com/SupportPortal, and then search for the article on configuring SQL Server user permissions in SQL Server 2005.

Support

For assistance during installation and configuration of Websense software, consult the following resources.

Online Help

Select the **Help** option within the program to display detailed information about using the product.



Important

Default Microsoft Internet Explorer settings may block operation of the Help system. If a security alert appears, select **Allow Blocked Content** to display Help.

If your organization's security standards permit, you can permanently disable the warning message on the Advanced tab of the **Tools > Internet Options** interface. (Check **Allow active content to run in files on My Computer** under Security options.)

Technical Support

Technical information about Websense products is available online 24 hours a day, including:

- ◆ latest release information
- ◆ searchable Websense Knowledge Base
- ◆ show-me tutorials
- ◆ product documents
- ◆ tips
- ◆ in-depth technical papers

Access support on the Web site at:

www.websense.com/SupportPortal/

For additional questions, fill out the online support form at:

www.websense.com/SupportPortal/Contact.aspx

If your issue is urgent, please call one of the offices listed below. You will be routed to the first available technician, who will gladly assist you.

Location	Contact information
North America	+1 858-458-2940
France	Contact your Websense Reseller. If you cannot locate your Reseller: +33 (0) 1 57 32 32 27
Germany	Contact your Websense Reseller. If you cannot locate your Reseller: +49 (0) 69 51 70 93 47

Location	Contact information
UK	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Rest of Europe	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Middle East	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Africa	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 20 3024 4401
Australia/NZ	Contact your Websense Reseller. If you cannot locate your Reseller: +61 (0) 2 9414 0033
Asia	Contact your Websense Reseller. If you cannot locate your Reseller: +86 (10) 5884-4200
Latin America and Caribbean	Contact your Websense Reseller.

For telephone requests, please have ready:

- ◆ Websense subscription key
- ◆ Access to Websense Manager
- ◆ Access to the machine running Filtering Service, the machine running reporting tools, and the database server (Microsoft SQL Server or MSDE)
- ◆ Permission to access the Websense Log Database
- ◆ Familiarity with your network's architecture, or access to a specialist
- ◆ Specifications of machines running Filtering Service and Websense Manager
- ◆ A list of other applications running on the Filtering Service machine

