FORCEPOINT
POWERED BY Raytheon

New Admin Quick Start

Forcepoint™ TRITON® AP-WEB

v8.3.x

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Trademarks

Contents

1 Welcome

Welcome to Forcepoint™ web protection solutions.

Use this quick start tutorial to learn the basics of Internet policy management and reporting. The tutorial is made up of a series of short lessons, divided into 4 sections:

Initial Setup	Policy Management
Navigation Tips	Reporting

Each lesson requires between 5 and 10 minutes to complete.

To get started, first click on your role below.

- If your organization does not use or has not yet configured delegated administration roles, click **Super Administrator**.
- If you manage policies for a specific set of clients, click **Delegated Administrator**.
- If you have permission to run reports on managed clients, but the clients' policies are managed in another role, click **Reporting Administrator**.

Super Administrator (including admin)

Delegated Administrator

Reporting Administrator

Super Administrator

If you are a Super Administrator (or logging on as **admin**), all of the tutorial's lessons apply:

- Use the *Navigation Tips* section to become familiar with the TRITON Manager and its Web module.
  - *Lesson 1: Using the management console*, page 9
  - *Lesson 2: Accessing Help*, page 14
- Use the *Initial Setup* section to verify that the Master Database is downloaded.

  If another Super Administrator has already configured your web protection software, skip to the next section.
- Use the *Policy Management* section to learn to create and modify Internet access policies, and to apply policies to clients.
  - *Lesson 4: The Default policy*, page 19
  - *Lesson 5: Working with clients*, page 21
  - *Lesson 6: Using the sample policies*, page 23
  - *Lesson 7: Managing URLs by category*, page 25
  - *Lesson 8: Creating custom policies*, page 27
  - *Lesson 9: Managing URLs with exceptions*, page 28
- Use the *Reporting* section to understand the available reporting options, and to enable a reporting option used to continually improve policy enforcement.
  - *Lesson 10: Dashboard reports*, page 32
  - *Lesson 11: Presentation Reports*, page 36
  - *Lesson 12: Investigative Reports*, page 39
  - *Lesson 13: Real-Time Monitor*, page 44
  - *Lesson 14: Improving web protection software*, page 45

At the end of the tutorial, *Where Do I Go Next?*, page 49, provides pointers to additional topics and resources, including the Knowledge Base and online video tutorials.

To find this tutorial again later, click the **Help** button from any page in the TRITON Manager and expand the **Getting Started** option.

Delegated Administrator

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The topics covered in lessons 1-2 and 4-9 require policy permissions. Not all administrators with policy permissions can create exceptions (covered in lesson 9).

The topics covered in lessons 10-13 require reporting permissions. Not all administrators with reporting permissions can access dashboard charts, presentation reports, or Real-Time Monitor (covered in lessons 10, 11, and 13).

- Use the *Navigation Tips* section to become familiar with the TRITON Manager and its Web module. This section shows you how to configure policies and reporting, and identify methods of obtaining assistance, when needed.

- *Lesson 1: Using the management console*, page 9
- *Lesson 2: Accessing Help*, page 14

- Use the *Policy Management* section to learn to create and modify Internet access policies, and apply them to clients. The final lesson in this section explains how to create exceptions that permit or block listed URLs for specified clients.
  - *Lesson 4: The Default policy*, page 19
  - *Lesson 5: Working with clients*, page 21
  - *Lesson 6: Using the sample policies*, page 23
  - *Lesson 7: Managing URLs by category*, page 25
  - *Lesson 8: Creating custom policies*, page 27
  - *Lesson 9: Managing URLs with exceptions*, page 28
- Use the *Reporting* section to understand the reporting tools that your permissions allow you to access.
  - *Lesson 10: Dashboard reports*, page 32
  - *Lesson 11: Presentation Reports*, page 36
  - *Lesson 12: Investigative Reports*, page 39
  - *Lesson 13: Real-Time Monitor*, page 44

At the end of the tutorial, *Where Do I Go Next?*, page 49, provides pointers to additional topics and resources, including the Knowledge Base and online video tutorials.

To find this tutorial again later, click the **Help** button from any page in the TRITON Manager and expand the **Getting Started** option.

Reporting Administrator

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If you are an administrator in one or more investigative reporting roles, with permission to report on managed clients whose policies are managed in other roles, the following lessons apply:

- *Lesson 1: Using the management console*, page 9
- *Lesson 2: Accessing Help*, page 14
- *Lesson 12: Investigative Reports*, page 39

To find this tutorial again later, click the **Help** button from any page in the TRITON Manager and expand the **Getting Started** option.

2 Navigation Tips

The TRITON Manager (console) is the management interface for TRITON security solutions. It provides access to configuration options, policy management features, and reporting tools.

This section includes 2 lessons to guide you through the TRITON console:

- *Lesson 1: Using the management console* introduces the Web module of the TRITON Manager, emphasizing useful tools and shortcuts.
- *Lesson 2: Accessing Help* provides an overview of the user assistance resources available to Web module administrators.

Lesson 1: Using the management console

Discover how to use the TRITON Manager to perform configuration, policy management, and reporting tasks for your web protection solution.

There are 3 TRITON Manager modules: Web, Data, and Email. Each contains configuration settings, policy management features, and reporting options for a TRITON solution. Administrators can be granted access to one or more of the modules, and be given specific permissions within each module.

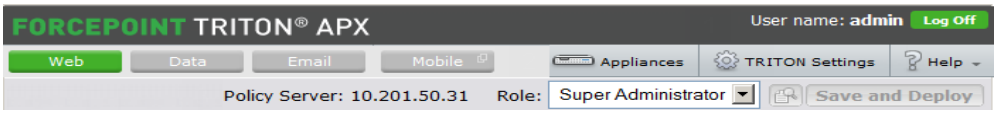
The default administrative account for the TRITON console is **admin**. The initial password for this account is set during installation. The admin account has full access to all TRITON modules. In the Web module, full access is equivalent to unconditional Super Administrator permissions.

If you are logged on as a delegated administrator with more limited permissions, some features (indicated below) may not be visible.

The Web module of the TRITON Manager is divided into 4 main areas:

	Across the top of the screen: • The **TRITON banner** shows information about your logon session. • The **TRITON toolbar** makes it easy to switch between modules, access TRITON settings, view a list of appliances in your network, and get Help. • The **Web module toolbar** lets you switch between Policy Servers, change administrative roles, and review and save changes.
	The **left navigation pane** is used to access status, reporting, and policy management features (under **Main**), as well as system administration tasks (under **Settings**).
	The **right shortcut pane** is used to find articles, videos, worksheets, and other support information, and to access tools for verifying your configuration.
	The **content pane** appears in the center of the TRITON console. The selections that you make in the left navigation pane or right shortcut pane determine what appears in the content pane.

Section 1: The banner, TRITON toolbar, and Web module toolbar:



The features that you see when you log on to the Web module of the TRITON Manager are dependent on your administrative **role**. The banner displays the user name for the account used to log on. If your organization does not use delegated administration, the account name is always admin, and has full access to all TRITON Manager functions.

The banner also includes a **Log Off** button, for when you're ready to end the session.

Just below the banner, the TRITON toolbar contains a tab for each TRITON console module. The current module is highlighted in yellow, and other available modules are shown in blue. Unavailable modules appear in gray. The TRITON toolbar also includes the following buttons:

- **Appliances**, used to view a list of appliances in your network.
- **TRITON Settings**, used to perform configuration tasks that affect all of the installed TRITON modules, like creating administrator accounts.
- **Help**, used to access context-sensitive instructions and troubleshooting materials, tutorials, and online Support tools. More information is available in *Lesson 2: Accessing Help*, page 14.

Under the module tray, the Web module toolbar provides information and access to features that apply to all pages in the Web module of the TRITON Manager:

- The current **Policy Server** IP address.

  When you open the Web module of the TRITON Manager, you connect to a component called **Policy Server**. By connecting to a specific Policy Server, you determine which segment of your deployment to manage.

- Your current delegated administration **Role**.

  When delegated administration roles are defined, administrators who manage multiple roles can use this list to change between roles. Super Administrators can use the list to switch to any role that has been defined.

- A **View Pending Changes** button that is enabled when changes have been cached, but not changed.

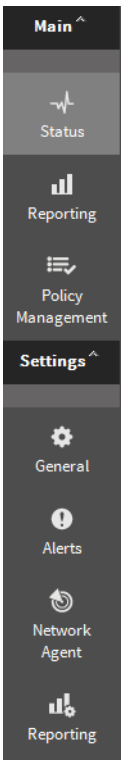
  Use this button to review a summary of cached changes before saving them, or to discard all pending changes.

- A **Save and Deploy** button, whose color indicates whether there are cached changes waiting to be saved

  Each time you perform a task, and then click **OK**, your changes are cached. You must click **Save and Deploy** to save and implement the changes.

Section 2: The left navigation pane:

The left navigation pane is grouped into 2 sections: Main and Settings.



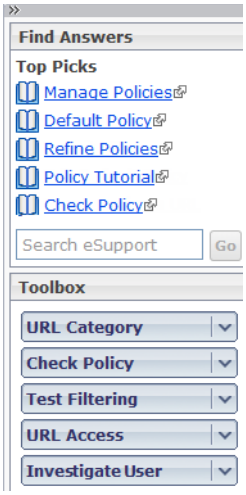
- The options under **Main** provide access to system status information, reporting functions, and policy configuration and management tools. The options are

available to all administrative users, but some navigation links are hidden for conditional Super Administrators and delegated administrators.

- The options under **Settings** provide access to account management functions, as well as global and local system administration tasks. The entire Settings group is hidden from some administrators. For others, it offers different options based on the administrator's permissions.

A small icon is associated with each of the options. Hover the mouse over an icon or option to display a menu of features in that group.

Section 3: The right shortcut pane:



Expand the right shortcut pane by clicking the left arrow icon (<<) at the upper right of the content pane. Minimize it by clicking the right arrow icon (>>) at the top of the pane.

The default admin account and unconditional Super Administrators can use all of the tools in the right shortcut pane. For other administrators, some options may be hidden.

- **Find Answers** provides links to relevant information to help you complete your management tasks.
  - **Top Picks** provides links to articles, papers, worksheets, videos, and webinars.
  - **Search** lets you locate additional articles, forum posts, videos, and other content on the eSupport website.
- The **Toolbox** contains quick lookup tools that you can use to verify your configuration.
  - Click **URL Category** to quickly determine how a URL is categorized.
  - Click **Check Policy** to find out which policy is currently being applied to a user.
  - Click **Test Filtering** to see how a specific URL is currently being handled (permitted, blocked, etc.) for a user.

- Click **URL Access** to create an investigative report showing whether a site has been accessed from your network within the past 14 days.
- Click **Investigate User** to create an investigative report showing which sites a user has visited in the past 14 days.

Section 4: The content pane:

The content pane appears in the middle of the TRITON console. When you connect to the Web module, the Threats dashboard appears in the content pane, showing information about advanced malware threat activity detected in your network.

When you click a link in the left navigation pane or the right shortcut pane, the content pane changes to display options appropriate to your selection.

Most of the remaining lessons in this quick start tutorial demonstrate how to use options in the content pane.

Continue with *Lesson 2: Accessing Help*, page 14.

Lesson 2: Accessing Help

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Learn how to get information and assistance when you have questions about your web protection software.

To help you get the most from your web protection software, the TRITON Manager includes several types of user assistance:

1	An icon accompanies many important product features. Position your mouse over this icon for a brief explanation of the feature.
2	For many tasks, help text appears directly on the page, providing usage guidelines or other pointers for using a tool or field.
3	The **Find Answers** tool in the right shortcut pane contains links to instructions, solutions, videos, technical papers, webinars, and other information relevant to the current page. It also includes a **Search** field that you can use to locate additional information on the eSupport website.
4	The Help button provides access to detailed information about each page in the TRITON Manager, often including step-by-step usage instructions. Click **Help**, then select **Explain This Page**.
5	To browse the Administrator Help, click **Help**, and then select **Contents**. The Help system is displayed in a separate tab or browser window. For a printer-friendly version of the Help system in PDF format, click the icon in the Help toolbar.

You have completed the Navigation Tips section of this quick start tutorial. Continue with *Initial Setup*.

3 Initial Setup

This section includes 1 lesson:

- *Lesson 3: Downloading the Master Database* explains the role of the Master Database in policy enforcement, and provides instructions for configuring and initiating database downloads.

  If you have already downloaded the Master Database, and set up a download schedule, you can skip this lesson.

When you are finished with this section, continue with *Policy Management*.

Lesson 3: Downloading the Master Database

Use this lesson to learn about subscriptions and the Master Database. The lesson includes instructions for entering a subscription key and creating a database download schedule.

Before this tutorial can be completed, an administrator must enter the subscription key used to activate your web protection software. Entering a subscription key:

1. Activates a partial version of the Master Database installed with your product.
2. Activates your software.
3. Initiates the download of the Master Database, which contains the category and protocol definitions that provide the foundation for policy enforcement.

Exercise 1: Enter your subscription key and configure database download settings:

1. Log on to the TRITON Manager.
2. If the subscription key has not been entered, the Initial Setup Checklist prompts you to enter the key:
   a. Enter any required proxy settings (if the machine running Filtering Service must go through a proxy to connect to the Internet).
   b. Enter your key and click **Apply**.

If Filtering Service is able to connect to the Internet and validate the key, a success message is displayed and the database download begins.

3. Click **Settings** on the left navigation pane, and then go to the **Account** page (selected by default when you select Settings). Information about your subscription appears near the top of the page.

   Complete subscription information is not displayed until the first database download is complete.

4. Click **Settings > Database Download** in the left navigation pane. Master Database configuration information appears in the content pane.

5. Use the **Download days** check boxes and **Download timeframe** drop-down lists to establish a schedule for downloading the Master Database.

   By default, your web protection software is configured to attempt a download every day, some time between 9:00 p.m. and 6:00 a.m. Daily downloads ensure that you are always using current information for policy enforcement. Database downloads should occur at least once a week.

   

   Note

   If you do not download the Master Database for 14 days, policy enforcement stops.

   If no download days are selected on the Database Download page, your web protection software attempts to download the database every 7 days.

6. If your network requires authentication to a proxy server or firewall, do the following. Otherwise, skip to step 7.

   a. In the Authentication area at the bottom of the screen, check **Use Authentication**.

   b. Enter the **User name** and **Password** required by the proxy server or firewall.

      You may also need to configure the proxy server or firewall to accept clear text or basic authentication.

7. If your network requires that browsers use an upstream proxy server to reach the Internet, do the following. Otherwise, skip to step 8.

   a. In the Proxy Server area, check **Use proxy server or firewall**.

   b. Enter the name or IP address of the proxy server or firewall machine in the **Server IP or name** field.

   c. Use the **Port** field to enter the port used by the proxy server or firewall (the default is 8080).

8. Click **OK** to cache your settings, and then click **Save and Deploy** in the toolbar to implement them.

After you enter a subscription key, the Master Database begins to download in the background.

Exercise 2: Verify Master Database download status

To view database download status, or to manually initiate a download at any time:

1. In the Main section of the left navigation pane, select **Status > Dashboard**.
2. Select the **System** tab of the Dashboard page.

   The Health Alert Summary (displayed by default at the top of the System dashboard) provides general download status information.
3. Click **Database Download** (in the toolbar at the top of the page) for detailed download information.
   - By default, the Database Download page displays a summary of all Filtering Service machines, listing the Master Database version currently in use on each, as well as the status of the last download.
   - You can manually initiate a database download from this page by clicking the **Update** button for a Filtering Service instance. If a download attempt is in progress, the button is disabled.
4. Click a Filtering Service IP address in the list on the left to see detailed download information, including progress information for ongoing downloads.
5. Click **Close** to return to the Dashboard page. Closing the Database Download page does not interfere with any updates that may be in progress.

Important

If you have the Web Hybrid module, after your first successful Master Database download is complete, log off of the TRITON console and log back on. This allows several hybrid-specific pages to be displayed.

When a database update adds or removes pre-defined categories and protocols, you must log off of the TRITON console and log on again to see the updated category and protocol lists. This protective measure ensures that database updates do not interfere with any policy updates that administrators may be making.

A database update that adds or removes categories and protocols is likely to occur:

- When you first enter your subscription key and download the Master Database.
- After you have moved from Web Filter & Security to TRITON AP-WEB.

Typically, category and protocol additions or removals are rare, and generally publicized several weeks before the update takes place. If you have configured your web protection software to notify administrators of systems alerts, you will also receive notification when new categories and protocols have been added or removed.

You have completed the Initial Setup section of this quick start tutorial. Continue with *Policy Management*.

4 Policy Management

This section includes 6 lessons:

- *Lesson 4: The Default policy* introduces the policy that acts as a safety net, governing Internet access for any client not explicitly assigned another policy.
- *Lesson 5: Working with clients* describes how to add users, groups, and computers as clients for use in applying policies.
- *Lesson 6: Using the sample policies* reviews the pre-defined policies included with your web protection software, and takes you through the process of editing policies.
- *Lesson 7: Managing URLs by category* introduces the concept of category filters and guides you through the process of creating your own, custom filters.
- *Lesson 8: Creating custom policies* shows how you can build your own policies and apply them to clients.
- *Lesson 9: Managing URLs with exceptions* explains how to create exceptions that permit one or more specific URLs for clients that you select.

Lesson 4: The Default policy

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Learn about the policy that serves as a safety net, governing Internet access for any user to whom no other policy applies.

Your web protection software uses **policies** to determine how and when Internet requests are handled for users and devices. Each policy includes information about which websites and Internet communication protocols are blocked or permitted, and the days and times to enforce those rules.

As a safety net, the **Default** policy is in effect 24 hours a day, 7 days a week. This policy is used to handle requests whenever no other policy applies. Initially, the Default policy monitors requests without blocking.

> **Note**
> If your organization uses delegated administration, each role has its own Default policy. A role's Default policy is enforced for any clients in the role who do not have another policy assigned to them.

Exercise: Become familiar with the Default policy

1. In the Web module of the TRITON Manager, use the left navigation pane to select **Main > Policy Management > Policies**.

   A list of existing policies appears in the content pane.
2. Click **Default** to view policy details on the Edit Policy page.
3. Examine the area at the top of the content pane.
   - The policy name appears, followed by a short description of what the policy is intended to do.
   - A summary of the clients specifically governed by this policy is shown. Note that even if no clients are listed here, the **Default** policy applies to any client not currently governed by another policy.
4. Examine the **Schedule** box.
   - After a new installation, the Start, End, and Days columns show that the **Default** policy is in effect 24 hours a day, 7 days a week.
   - Initially, in the Super Administrator role, the Category / Limited Access Filter column shows that the **Monitor Only** filter is in effect. In delegated administration roles, the Default policy initially enforces the **Default** category filter.

     A **category filter** is a list of categories and the actions (such as Permit or Block) assigned to them. The category filter enforced by a policy determines how user Internet requests are treated.

     The alternative to a category filter is a **limited access filter**, a list of specific URLs that users can access. When a limited access filter is enforced by a policy, users governed by the policy can access only sites on the list.
   - Initially, in the Super Administrator role, the Protocol Filter column shows that the **Monitor Only** filter is in effect. In delegated administration roles, the Default policy initially enforces the **Default** protocol filter.

     A **protocol filter** is a list of protocols (usually non-HTTP protocols) and the actions (such as Permit or Block) assigned to them. When Content Gateway or Network Agent is installed, the protocol filter enforced by a policy determines which non-HTTP protocols (for example, instant messaging, streaming media, or file sharing protocols) are available to users and applications.

5. Two columns appear beneath the policy schedule. Examine the Category Filter column.
   - The name of the current category filter appears next to the column description.
   - You can scroll through the list to see which categories are permitted and blocked. A legend at the bottom of the page explains the icons that appear next to each category.

   You will learn how to create and edit category filters in a later lesson.

In the lessons that follow, you will learn how to work with policies and their building blocks. You can then use what you learn to edit the Default policy to best suit the needs of your organization.

Continue with *Lesson 5: Working with clients*, page 21.

Lesson 5: Working with clients

Learn about user, computer, and network clients, and then practice adding clients to the Web module of the TRITON Manager.

Internet access policies are applied to clients: users, groups, and OUs in your directory service, or computers and network ranges in your network.

- A **computer** is the most basic type of client. A computer is a machine on the network, identified by an IP address.
- A **network** is a group of computers, identified by a contiguous IP address range.
- A **directory** client can be a user, group, or OU (organizational unit) defined in your directory service. More information about directory services can be found in the “Clients” section of the Administrator Help.

Exercise 1: Add a computer client

1. Use the left navigation pane to go to the **Main > Policy Management > Clients** page.
2. Under the Clients tree, click **Add**. The Add Clients page appears.
3. Enter the **IP address** of a computer that you want to add as a client, and then click the right arrow (>) button to add the client to the Selected list.

   If you are a delegated administrator, you can only add IP addresses that are assigned to your role as a managed client. Go to the **Policy Management > Delegated Administration** page, and then click your role name to see a list of managed clients for your role.
4. Click **OK** to cache your change and return to the Clients page.
5. Expand the **Computers** node in the Clients tree. The IP address that you just added appears in the list.

Information about the settings that apply to the new client appear to the right of the IP address. The **Policy** column shows that this client is currently governed by the **Default** policy.

6. Click **Save and Deploy** to implement your changes.

Exercise 2: Add a directory client

If your software has been configured to retrieve information from a supported directory service, you can apply policies to users, groups, and OUs.

Information about configuring your web protection software to communicate with a directory service can be found in the "Clients" section of the Administrator Help.

Once configuration is complete, you can add directory clients through the same page used to add computer and network clients:

1. On the **Policy Management > Clients** page, under the Clients tree, click **Add**. The Add Clients page appears.
2. To locate an entry in your directory service, do either of the following:
   - Browse the **Directory** tree.
   - Enter all or part of a user, group, or domain name in the search field, if available, and then click **Go**.
3. Select a user, group, or domain to add as a client, and then click the right arrow (>) to add the client to the Selected list.

   If you are a delegated administrator, you can only add users that are assigned to your role as a managed client. Go to the **Policy Management > Delegated Administration** page, and then click your role name to see a list of managed clients for your role.
4. When you are finished adding users, click **OK** to cache your changes and return to the Clients page.
5. Click **Save and Deploy** to implement your changes.

Expand the **Directory** node of the client tree to see a list of current user, group, domain, and OU clients.

In the next lesson, you will work with a sample policy to change the way that clients' Internet activity is managed.

Continue with *Lesson 6: Using the sample policies*, page 23.

Lesson 6: Using the sample policies

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Use a sample policy to learn more about how to apply different filters at different times of day and on different days of the week.

In addition to the **Default** policy, your web protection software includes two sample policies that you can use to learn more about managing Internet activity.

- The **Unrestricted** policy enforces the **Permit All** category and protocol filters, 24 hours a day and 7 days a week. Apply this policy to any members of your organization whose Internet activity should never be restricted.
- The **Example - Standard User** policy provides an example of how one policy can apply different filters at different times.

Note

If you are a delegated administrator and do not see the Example - Standard User policy, ask a Super Administrator to copy the sample policy to your role.

Exercise 1: Apply the sample policy to clients

1. Go to the **Policy Management > Policies** page.

   A list of policies and descriptions appears in the content pane.
2. Click **Example - Standard User** to view the sample policy.
3. Under the policy name and description at the top of the page, check to see if the policy is applied to any **Clients**.

   When you make changes to a policy, any clients governed by the policy are affected.
4. Examine the **Schedule** portion of the policy.

   This policy includes multiple lines. Each line corresponds with a block of time. Add multiple time blocks to a policy to enforce different filters and different times. In the sample policy:

   - The Default category and protocol filters are enforced from 8:00 a.m. to 5:00 p.m., Monday through Friday.
   - The Basic category filter and Basic Security protocol filter are enforced from 5:00 p.m. to 8:00 a.m. Monday through Friday. Note that when an enforcement period spans midnight, you must create 2 time blocks: one ending at 24:00 (midnight) and another starting at 00:00 (midnight).
   - The Monitor Only category and protocol filters are enforced on Saturday and Sunday, permitting access to all sites.
5. Select each time block in turn. The category and protocol filter enforced during that period are displayed in the bottom portion of the screen.

When a time block is selected, you can edit the filters enforced during that period on the Edit Policies page.

6. To assign the sample policy to a client, click **Apply to Clients** in the toolbar at the top of the screen.
7. Browse the **Clients** tree to identify a client to be governed by the sample policy. Pick a client added in Lesson 6 that you can use to test the effects of this change.
8. Mark the check box next to the client name or IP address, and then click **OK** to cache your change and return to the Edit Policy page.
9. Click **OK** on the Edit Policy page and then click **Save and Deploy** to implement your change.

The selected client now receives the Example - Standard User policy.

Exercise 2: Verify policy enforcement behavior manually

One way to judge the effects of applying a policy to a client is to access the client machine or log on using the client's network credentials and use a browser to see which sites are permitted and blocked.

Important

Before performing this lesson, make sure that the Master Database has finished downloading. Go to the **Status > Dashboard** page, then click **Database Download** in the toolbar at the top of the content pane. Verify that the download status is **Successfully updated**.

You may need to log off of the TRITON console and log on again to allow the new database to finish loading.

1. If you applied the sample policy to a computer client in the previous exercise, log on to that client machine.

   If you applied the sample policy to a user or group client, log on as the affected user.
2. Open a browser window and navigate to **www.ucsd.edu**.

   This site is part of the **Educational Institutions** category, which is permitted by the Default, Basic, and Monitor Only category filters.
3. Browse to **www.calottery.com**.

   This site belongs to the **Gambling** category. Both the Basic and Default category filters block this category. If you are performing this exercise on any day from Monday through Friday, a block page appears.
4. Browse to **www.amazon.com**.

   This site belongs to the **Shopping** category. If the Default category filter is in effect, you are prompted to use quota time to access the site. (More information about quota time appears in the next lesson.) If the Basic category filter is in effect, the site is permitted.

When you are finished exploring which sites are blocked and permitted by the sample policy, return to the TRITON console.

Exercise 3: Use the **Test Filtering** tool to verify policy enforcement behavior:

The TRITON Manager includes tools to help you see how client requests are handled without logging on as the user or accessing the Internet from a specific machine.

- Make sure that the right policy is being applied.
- Verify that the active policy is blocking and permitting sites as expected.

To see whether a client requesting a specific site would be permitted access:

1. Click **Test Filtering** in the Toolbox section of the right navigation pane.
2. To identify the client to whom you have applied the Example - Standard User policy, do one of the following:
   - Enter the **IP address** of a computer client.
   - Enter the full distinguished name of a directory client in the **User** field, or click **Find User** to browse or search the directory. The search feature is available only if you are using an LDAP-based directory service.
3. Enter the **URL** of a site that you want to check.
4. Click **Go**.

A pop-up window shows the name and description of the website's category, the action applied to the site, and the reason for that action.

In the sections that follow, you will learn how to create custom category filters and then to create custom policies to manage client Internet requests.

Continue with *Lesson 7: Managing URLs by category*, page 25.

Lesson 7: Managing URLs by category

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Learn how category filters are used in policy enforcement, and then create and edit a custom category filter.

Category filters determine how user requests for HTTP, HTTPS, FTP, and Gopher sites are treated.

Each website is identified by a unique IP address or URL. The Master Database assigns these addresses to categories, such as Adult Material, Education, or Spyware.

Within a category filter, an action, such as **Permit** or **Block**, is assigned to each category. Every site within the category is managed according to the action that you assign.

Your software includes several category filters and templates to help you get started. You can edit the filters to suit the needs of your organization, but the templates cannot be changed. When you create a new filter, you can base it on either a template or an existing category filter.

To understand how category filters work, imagine that certain users in your organization should only have access to websites affiliated with educational institutions. Complete the following exercises to create a filter for these users.

Exercise 1: Create an Education-Only category filter

1. Go to the **Policy Management > Filters** page.
2. In the **Category Filters** box, click **Add**. The Add Category Filter page appears.
3. Enter **Education-Only** as the name of the new category filter.
4. Create a description for the filter (for example, "For student research assistants, permits access only to sites in the Education category").
5. Select the **Block All** template to use as the foundation for the new filter.
6. Click **OK** to cache changes and open the Edit Category Filter page. The new filter name appears at the top of the page.

You will customize the filter in Exercise 2.

Exercise 2: Modify the Education-Only category filter

1. Select **Education** in the Categories tree, and then click **Permit**. The Permit button appears to the right of the Categories tree.
2. Expand the **Education** node. Note that the Education subcategories are still blocked.
3. With the **Education** parent category still selected, click **Apply to Subcategories**. All of the Education subcategories (Cultural Institutions, Educational Institutions, and so on) are permitted.
4. Click **OK** to cache your changes and return to the Filters page.
5. Click **Save and Deploy** to implement your changes.

Once you have created custom category filters, you can add them to policies and apply them to clients.

Continue with *Lesson 8: Creating custom policies*, page 27.

Lesson 8: Creating custom policies

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Learn to create different policies to customize policy enforcement for different groups of clients.

Create new policies to add flexibility in managing employee Internet access. Rather than trying to make the **Default** policy apply to everyone, create custom policies for different groups of clients.

Exercise 1: Start from an existing policy to create a new policy

1. Go to the **Policy Management > Policies** page.
2. Under the list of existing policies, click **Add**. The Add Policy page appears.
3. Give the new policy the name **Research Assistants**.
4. Provide a brief description for the new policy (for example, “For student research assistants, enforces the Education-Only category filter”).
5. Mark the **Base on existing policy** check box, and then select the **Default** policy from the drop-down list.
6. Click **OK** to cache your changes and go to the Edit Policy page.

You will customize the policy in Exercise 2.

Exercise 2: Edit the Research Assistants policy

1. On the Edit Policy page, under Schedule, expand the **Days** drop-down list, and then deselect **Sat** and **Sun**.

   This policy will only apply Monday through Friday. You can add multiple rows to the schedule to have a policy apply different filters on different days or at different times.
2. Expand the **Category / Limited Access Filter** drop-down list, and then select the **Education-Only** category filter.
3. Expand the **Protocol Filters** drop-down list, and then select the **Default** protocol filter.

   Protocol filters are used to filter non-HTTP Internet protocols, such as those used for instant messaging or streaming media. For more information, see the Administrator Help.
4. At the bottom of the Schedule box, click **Add** to add another row to the schedule.

   A default time period appears in the **Start** and **End** columns.
5. Expand the **Days** drop-down list, and select only **Sat** and **Sun**.
6. In both the **Category / Limited Access Filter** column and the **Protocol Filter** column, apply the **Monitor Only** filter.

   Monitor Only permits and logs all Internet requests.
7. Click **OK** to cache changes and return to the Policies page.

8. Click **Save and Deploy** to implement your changes.

Exercise 3: Apply the new policy to a client

In Lesson 7, you learned how to apply policies to clients from the Edit Policies page. You can also apply policies to clients from the Clients page.

1. Go to the **Policy Management > Clients** page.
2. Expand the appropriate node in the client tree, and then do one of the following:
   - Mark the check box next to the client name or IP address, and then click **Edit**.
   - Click the client name or IP address.

   The Edit Client page appears.
3. Under Policy, expand the **Name** drop-down list and select **Research Assistants**.
4. Click **OK** to cache changes and return to the Clients page.
5. Click **Save and Deploy** to implement your changes.

Exercise 4: Verify that the new policy is being applied to the client:

1. Go to the machine to which you applied the Research Assistants policy.
2. Open a browser and go to **www.ucsd.edu**.

   The site is permitted, because it is assigned to the Education > Educational Institutions category.
3. Next, browse to **en.wikipedia.org**.

   This site is also permitted, because it is assigned to the Education > Reference Materials category.
4. Next, browse to a search engine site, like **www.google.com** or **www.yahoo.com**.

   The site is blocked, because it is in the Information Technology > Search Engines and Portals category.

You can also use the Test Filtering tool (as explained in Lesson 6, Exercise 3) to verify that the policy is being applied correctly.

Continue with *Lesson 9: Managing URLs with exceptions*, page 28.

Lesson 9: Managing URLs with exceptions

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Learn how to create an exception that blocks access to a specific URL, even though the URL is in a category permitted by current policies.

If you need to block a specific website in a permitted category (for example, because of misuse), you can create an **exception** to block just that URL, while continuing to permit the category in your policies.

Both Super Administrators and delegated administrators with appropriate permissions can create exceptions.

- By default, exceptions created by Super Administrators take precedence over delegated administrator exceptions.
- When Super Administrators create an exception, they can specify whether to allow delegated administrator exceptions to take priority over that exception.

See the Administrator Help for details about exception precedence.

Exercise: Create an exception to block or grant access to a URL

1. Go to the **Policy Management > Exceptions** page.
2. Under the Exceptions list, click **Add**.
3. On the Add Exception page, enter a unique, meaningful **Name** to identify the exception.
4. Click in the **URLs** box, then type in the URL that you want to block or permit (for example, blogger.com).

   If you create an exception for more than one URL, enter each URL on a separate line.
5. To identify which clients the exception applies to, select an option appropriate to your administrative role.

   Super Administrators can select:

   - **Global**, meaning all clients in all roles
   - **All clients in a role**, then select a role from the drop-down list
   - **Specific clients in any role**, then select, search, or browse to identify users, groups, OUs, or IP addresses.

   Delegated administrators can select:

   - **All managed clients in this role**
   - **Specific clients in this role**, then select, search, or browse to identify users, groups, OUs, or IP addresses assigned to their role.
6. By default, the exception Type is **Block**. Accept this option, or select **Permit** to grant access to the specified site for the clients you selected.
7. By default, the exception is set to **Never** expire. If you instead select the **After** radio button next to Expires, you are given the option to enter an expiration date.

   After an exception expires, it is no longer applied to client requests. It remains in the list on the Exceptions page, however, until you delete it. This gives you the option to reactivate an exception by changing its expiration date.
8. By default, the exception State is set to **Active**, meaning that it will start being applied to requests as soon as you cache and save your changes.

   If you are not ready to use the exception, clear the check box.
9. Click **OK** to cache your changes and return to the Exceptions page, then click **Save and Deploy** to implement your changes.

You have completed the Policy Management section of this quick start tutorial.

If you have reporting permissions, continue with *Reporting*.

If you do not have reporting permissions, see *Where Do I Go Next?* for additional resources.

5 Reporting

Before you can view charts on the **Status > Dashboard** page, or generate investigative or presentation reports, an essential, Windows-only reporting component—Log Server—must be installed. If Log Server is not installed, skip to *Lesson 13: Real-Time Monitor*, page 44.

Real-Time Monitor gathers its information from another component, Usage Monitor, that is typically installed with Policy Server. If you have administrative access to Real-Time Monitor, Lesson 13 applies even when other reporting components are not installed.

This section includes 5 lessons:

- *Lesson 10: Dashboard reports* introduces the **Status > Dashboard**, used to monitor threat activity, security risks, general usage, and system status for your deployment.
- *Lesson 11: Presentation Reports* shows you how to generate pre-defined reports and copy those reports to apply customized data selection filters, as well as how to set up a scheduled report job.
- *Lesson 12: Investigative Reports* shows you how to view log data interactively, identifying a topic of interest and drilling down to find greater detail. You will also learn how to generate and schedule reports.
- *Lesson 13: Real-Time Monitor* describes how to monitor current Internet activity in your network. This includes information about customizing your view of current traffic to show only specific clients, sites, and so on.
- *Lesson 14: Improving web protection software* explains how to implement features that let your software send specific types of feedback to Forcepoint LLC.

In networks that use delegated administration, Super Administrators control who can access these features.

Lesson 10: Dashboard reports

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Get a quick, graphical overview of current and recent system status. Learn to customize the information displayed.

The charts and information areas on the tabs of the **Status > Dashboard** page offer a quick, graphical overview of current and recent system status and Internet activity.

Each dashboard tab displays a set of default charts, counters, and informational summaries.

- Elements can be added to or removed from the Risks, Usage, and System dashboards.
  - Up to 12 elements can be displayed on each of these dashboards.
  - When you click most charts and counters on these dashboards, an investigative report with more details is displayed.
- On all dashboards, many of the charts can be configured to include different time periods, show different sets of information (top 5, top 6-10, and so on), display in different formats (stacked area chart, bar chart, multi-series line chart, and so on).

  Other configuration options may be available, depending on the dashboard and element selected.
- Dashboard information is updated every 2 minutes.

In organizations that use delegated administration, the Super Administrator controls who can view charts on the dashboard. Access to the Threats dashboard is configured separately from access to the Risks, Usage, and System dashboards.

By default, the TRITON console times out after 30 minutes of inactivity. You must log on again to view dashboard updates, or to work in other pages.

Section 1: The Threats dashboard

Use the Threats dashboard to review information about suspicious activity in your network. This type of activity is often associated with advanced malware threats.

- You cannot add elements to, nor remove elements from, the Threats tab.
- Clicking a chart on the Threats dashboard modifies the information shown in the summary table at the bottom of the page. It does not open an investigative report.

The Threats dashboard includes the following:

Dashboard Element	Description
Top Security Destinations	Maps the countries associated with suspicious activity in your network. These may be countries hosting sites in threat-related categories, or countries to which malicious software in your network is attempting to send data. By default, the top 5 countries are shown. Click a highlighted country to show only traffic to that destination in the Suspicious Event Summary.
Severity Events by Type	Charts the number of blocked requests for URLs in threat-related categories. By default, the top 5 most-requested categories are shown. Click a category in the chart to show only requests for that category in the Suspicious Event Summary.
Suspicious Event Summary	Provides severity, user, machine, category, time, and direction information for Internet activity that may be related to an advanced malware threat. Click a severity, user name, IP address, or device name (provided by Content Gateway; not available in Web Filter & Security deployments) to open an Event Details page with more information about activity of the selected type.

Filters at the top of the Threats dashboard can be used to limit the data shown on the page to a specific time period, severity level, or action (permitted or blocked).

The Suspicious Event Summary includes a Search box that can be used to further filter the data shown in the table.

Section 2: The Risks dashboard

Use the Risks dashboard to monitor permitted and blocked requests for URLs in the Security Risk class. By default, the following elements are displayed:

Dashboard Element	Description
30-Day Risk Trends	Shows blocked request trends for specific security and legal liability categories. Click a spark line to open the Threats dashboard or an investigative report (depending on category) with more information.
Clients with Security Risks	Shows which computers have been used to access Security Risk sites. You may want to check these machines to make sure they are not infected with any viruses or spyware.
Top Security Risk Categories	Shows which Security Risk categories have received the most requests. Security Risk is a **risk class**: a grouping of categories with similar characteristics. Security Risk categories include Phishing, Spyware, and Hacking, among others.
Risk Classes	Shows how many requests to each risk class (Security Risk, Legal Liability, Productivity, Business Usage, Network Bandwidth Loss) have been permitted and blocked.

Dashboard Element	Description
Top Uncategorized	Shows which URLs not categorized by the Master Database have been accessed most. Go to the **Filter Components > Edit Categories** page to assign a URL to a category.
Analytics: Security Risks	(*TRITON AP-WEB only*) Shows how many requests were assigned to new categories by Content Gateway analysis because the content had been changed or the site was compromised.

Section 3: The Usage dashboard

The Usage dashboard shows general Internet activity trends for your organization. By default, the following elements are displayed:

Dashboard Element	Description
Top Blocked Users	Shows which users have requested the most blocked URLs.
Top Requested Categories	Shows the categories that are being accessed most to provide a high-level overview of potential security, bandwidth, or productivity concerns.
Enforcement Summary	An overview of recently permitted requests, blocked requests for sites in the Security Risk class, and other blocked requests.
Web 2.0 Categories	(*TRITON AP-WEB only*) Shows the top categories assigned to requested Web 2.0 URLs, measured by requests.
Web 2.0 URL Bandwidth	(*TRITON AP-WEB only*) Shows the Web 2.0 URLs using the most bandwidth.
Analytics: Top Categories	(*TRITON AP-WEB only*) Shows the top categories to which requested URLs were assigned after Content Gateway analysis determined that they no longer fit their original category

Section 4: The System dashboard

The System dashboard displays general health and status information about your so deployment. By default, the following elements are displayed:

Dashboard Element	Description
Health Alert Summary	Provides brief status or error messages for system components. Click a message to view a more detailed alert and find solutions.
User Activity: Zoom Trend	Shows the volume of Internet requests processed into the Log Database. The unit of measurement depends on the period shown in the chart. By default, activity is shown in 3 hour and 30 minute intervals.

Dashboard Element	Description
Protocol Bandwidth Use	Shows which protocols (like HTTP, SMTP, BitTorrent, or Spotify) are using the most bandwidth.
Filtering Service Status	Lists the status of each Filtering Service associated with the current Policy Server
Hybrid Bandwidth Summary	(*TRITON AP-WEB only; requires the Web Hybrid module*) Shows the bandwidth consumed by Internet requests from users whose requests are managed by the hybrid service
Hybrid Requests Processed	(*TRITON AP-WEB only; requires the Web Hybrid module*) Shows how many Internet requests made by users from your organization were permitted and blocked by the hybrid service.

Exercise: Customize the Risks, Usage, and System tabs

Administrators with permission to view charts on the dashboard can customize which charts appear or the Risks, Usage, and System tabs.

1. Navigate to the Risks, Usage, or System tab of the dashboard, then click **Add Chart** in the toolbar at the top of the page.

   The customize page lists the available dashboard elements. A blue circle marks the charts and other elements (counters, summaries) that currently appear on the selected tab.

   There are 2 charts listed that do not appear by default on any tab:

   - **30-Day Value Estimates** gives estimates of time and bandwidth savings afforded by your web protection software over a 30-day period that includes today.
   - **Activity Today** provides examples of how your software has protected your network, the total number of requests handled so far today, the number of requests blocked, and the number of real-time database updates processed.
2. Select a tab from the **Add elements to tab** drop down list.
3. Select an element (chart, counter, summary) from the **Dashboard Elements** list.
   - Each tab can show a maximum of 12 elements.
   - Elements currently displayed on the selected tab are marked by a blue circle icon.
   - You can add multiple copies of the same element to a tab (for example, each might show a different time period).
4. The selected element appears in the **Preview** pane. Optionally update the chart **Name**, then update any of the following that are available:
   - **Chart type**: Many charts can be displayed as a multi-series bar, column, or line chart, or as a stacked area or column chart. Some can be displayed as bar, line, or pie charts. Which types are available depends on the data being displayed.

- **Time period**: Most charts can display a variable time period from Today (the 24-hour period beginning at midnight of the current day) to 30 days or longer (as configured by a Super Administrator on the **Settings > Reporting > Dashboard** page).
- **Top**: Charts displaying information about the top users, categories, URLs, and so on can typically display up to 5 values. Select whether to show the top 5 values, 6-10 values, 11-15 values, or 16-20 values.

For some elements, only the name can be customized.

5. Click **OK** to implement the changes and return to the Dashboard page.

Continue with *Lesson 11: Presentation Reports*, page 36.

Lesson 11: Presentation Reports

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Learn what presentation reports are, and how to generate reports from report templates, and how to create custom reports.

Presentation reports offer a view into the Internet activity data stored in the Log Database. Pre-defined charts and tabular reports, called templates, make it easy to generate a consistent presentation of data on a particular topic, such as the categories that have been blocked the most during a particular time frame.

In networks that use delegated administration, Super Administrators control who has access to these features.

Exercise 1: Generate a pre-defined report

1. In the Web module of the TRITON Manager, go to the **Main > Reporting > Presentation Reports** page.
2. In the Report Catalog tree, expand the **Internet Activity** heading, and select the **Top Sites Visited** report.

   Immediately after installation, only pre-defined reports and templates appear in the tree. If the software has been in use for some time, the tree may also include:

   - Favorite reports (marked with a star)
   - Custom reports
3. Click **Run** at the top or bottom of the list.
4. Fill out the Run Report page as follows:

Field	Description
Start date End date	Leave the default dates, which define a report covering the current day's activities.

Field	Description
Output format	Select HTML to display the finished report in the browser window.
Top N	Leave the default setting of 10. (This reports on the top 10 sites.)

5. Deselect **Schedule the report to run in the background**. The report will be generated in a pop-up window in the foreground.

Tip

It is usually most efficient to run reports in the background. You can opt to receive email notification when the report is complete, and use the **Presentation Reports > Review Reports** page to access the report.

6. Click **Run**.

   The report will display in the content pane.

Exercise 2: Create a custom report and edit its filter

1. On the Presentation Reports page, expand the Internet Activity node in the Report Catalog, then select the **Top Sites Visited** report.
2. Click **Save As**.
3. On the **Save As New Report** page, change the Report catalog name to **New Top 5 Sites Visited**.
4. Click **Save and Edit** to display the **Edit Report** page, where you can customize the elements of the report.
5. Accept the default (all items reported), and click **Next** to move through the Clients, Categories, and Protocols tabs.

   When generating future reports, you can use these tabs to fine-tune the content of the report.
6. On the Actions tab, expand the **Permitted** node in the tree and mark all of the permitted actions, then click the right arrow (>) to move them to the Selected list. When you are finished, click **Next**.

   This limits the report to only URLs that clients were able to access, omitting blocked sites.
7. On the Options tab, change the **Show only top** setting to **5** to have the report show only the top 5 sites visited. Then, click **Next**.
8. On the Confirm tab, select **Save and run**, and then click **Finish**.
9. On the **Run Report** page, set the **Output format** to **HTML**, deselect **Schedule the report to run in the background**, and then click **Run**.

   Your web protection software gathers the appropriate records from the Log Database, and displays the report in the content pane.

The changes you made in the report filter are saved with the new report, and the new report name is listed in the Report Catalog on the Presentation Reports page. Any time you choose this report to run, it uses the filter you defined. You can also edit the filter later.

Exercise 3: Configure distribution for scheduled reports

Basic configuration is needed before you can schedule reports for email distribution. If these settings have already been configured, skip to Exercise 4.

If these settings are not configured and you are a Super Administrator, you can update your settings. Otherwise, ask a Super Administrator to perform the configuration before you continue with Exercise 4.

1. Go to the **Settings > Reporting > Preferences** page.
2. Enter the **Email address** from which reports should be sent.
3. Enter the IP address or name of the email server that will distribute scheduled reports to their email recipients in the **SMTP server IP or name** field.
4. Click **Save Now** to implement the changes.

Exercise 4: Schedule reports to run periodically

1. Go to the **Main > Reporting > Presentation Reports** page.
2. Click **Scheduler** in the toolbar at the top of the page.
3. Use the **Schedule Report** tab to set the following options. Then, click **Next**.
   - Job name: **Test**
   - Recurrence Pattern: **Daily**
   - Schedule time: 10 minutes from your current system time
   - Schedule Period: End after **2** occurrences
4. On the Select Reports tab, select the **New Top 5 Sites Visited** report and click the right arrow (>) to move it to the Selected list. Click **Next**.
5. On the Date Range tab, select **Relative Dates** from the drop-down list, and then select **Last 2** and **Day(s)**. Click **Next**.
6. On the Output tab, set the following:
   - File format: **PDF**
   - Recipient email addresses (Cc): enter your own email address
7. Click **Save Job** to save and implement the schedule.

   Starting in 10 minutes, your web protection software gathers the appropriate records from the Log Database, and creates the report as a PDF file. It then sends you the PDF file via email. The report will be generated twice: today and tomorrow.

Continue with *Lesson 12: Investigative Reports*, page 39.

Lesson 12: Investigative Reports

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Learn what investigative reports are and how to find specific information. Generate and modify a detail view report, and create Favorite reports that can be scheduled on a repeating cycle.

Investigative reports let you interact directly with the Internet activity data stored in the Log Database. Initially, a bar chart showing today's activity by risk class is displayed. Investigate areas of concern by clicking appropriate chart elements to drill down for greater detail or by using the search feature.

- Make a few selections to view multiple levels of information, such as the top 5 users in the top 5 categories.
- A separate detail view gives you a tabular report of related information. You can customize the columns displayed, and create a summary view of this table.
- See *Investigative reports reference*, page 42, for more information about what can be displayed in investigative reports.

In networks that use delegated administration, Super Administrators control who has access to these features.

Exercise 1: Use search to locate specific data

To generate reports on specific URL hosts, destination IP addresses, users, groups, source IP addresses, address ranges, or ports, you can start by performing a search.

1. On the **Main > Reporting > Investigative Reports** page, open the **Search for** drop-down list and select one of the following options.
   - To identify a user by name, select **User**. (User Service must be installed.)
   - To identify a machine by its IP address, select **Source IP**.
2. Enter all or part of a user name or IP address (depending on which option you entered in step 1), then click the right arrow button.
3. A new report showing activity specific to the user or IP you entered is displayed.

Exercise 2: Drill down to investigate activity

In addition to search, you can click on or select items in a summary report to drill down into the details and locate the information that matters most to your organization.

1. On the **Reporting > Investigative Reports** page, expand the **Internet Use by** list and select **Risk Class**.
2. In the resulting summary report, click **Security Risk** to display a list of drill-down options.

   If there is no Security Risk entry, clients in your network have not requested any sites in that risk class. In that case, select another risk class.

3. Select **by User** from the list of options to generate a new report showing each users activity in all categories assigned to the Security Risk class.

   If you are not using User Service, this list shows the source IP addresses for the requests.

4. Click a user name or IP address, then select **by URL Hostname**. A new report is generated, showing the Security Risk URLs requested by the selected client.

Note that you can change the report time period using the **View** drop down list or the **View from** date fields. You can also change the measurement used to quantify activity by selecting a new option from the **Measure** drop-down list in the toolbar near the top of the content pane.

Exercise 3: Creating a multi-level report

Starting with a report on the main Investigative Reports page, you can define a second level of information to display. This allows you, for example, to compare the most active users in one category with the most active users in another category.

1. In the breadcrumbs beside the **Internet Use by** list, click **User**.

   The chart displays the users in the risk class selected in the previous exercise.

2. In the bar above the chart, enter the following:
   - Select top **5**
   - by **Category**
   - and Display **10** Results

3. Click the **Display Results** button.

   The chart updates to show bars for only the top 5 users. Below each bar is a list of the 10 categories requested the most often by that user during the timeframe.

You can create a multi-level report with different combinations of data. Simply modify the bar chart to show the high-level data of interest, then define the second level as described above.

Exercise 4: Using flexible detail reports

Flexible detail reports give a tabular view of data related to a specific area of interest. You can change to a summary view of the same data, and change the information columns displayed.

1. On the main Investigative Reports page, select **User** from the **Internet Use by** list.
2. Click the bar or number for any user that shows a significant number of hits.

   A detail view appears, showing a tabular report of today's traffic for the selected user. The default report includes columns for Day, Time, URL Hostname, Category, and Hits.

3. Click **Modify Report** in the toolbar at the top of the content pane.
4. Use the controls in this dialog box to remove the **Time** column, and add **Action** as a column, between Date and URL Hostname.

You can choose up to 7 columns in this dialog box. Be sure to choose columns that are appropriate for the data being reported, or the column will be blank.

Notice that although the report shows hits, Hits does not appear as an entry in the list. Reports based on hits must include Hits as the rightmost column.

5. Click **Submit** to close the dialog box and update the report.

   The new columns are now displayed, in the order you specified.

6. Click **Summary**, in the upper right corner of the content pane.

   The updated report combines all hits with the same URL hostname and date into a single entry showing the total number of hits.

The Summary report option is available only when the Time column is not displayed. It combines rows that share a common element. The combined element varies according to the information in the report. In this example, it combines those with the same URL hostname.

Exercise 5: Saving and scheduling Favorites

Favorites are report definitions that you want to reproduce easily, and may want to schedule on a repeating cycle. You can save reports shown on the main Investigative Reports page, or the flexible detail view.

1. Generate a report that shows information you want to reproduce easily.
2. Click **Favorite Reports** at the top of the content pane.
3. On the Favorite Reports page, a file name is suggested for the report. Accept that name or enter a different file name, if desired.

   Only letters, numbers, and underscore characters (_) are permitted in the file name.

4. Click **Add** to save the report as a Favorite.
5. Select the added report in the list, and then click **Schedule** to run the report on a repeating cycle.
6. Fill in the information requested.

   To create a recipient list, enter an address in the **Additional Email Addresses** field, and then click **Add**. Be sure to highlight one or more email addresses to be recipients.

7. Click **Next** after all entries are complete to display a confirmation screen showing your selections.
8. Click **Save** to save the scheduled report job and display a list of all scheduled reports.

The job will run according to the schedule you set, and email the report to the selected recipients. At any time, you can review the list of scheduled jobs, edit a job definition, or delete an obsolete job by clicking **Job Queue** on the main Investigative Reports page.

If you are a reporting administrator in an investigative reporting role, you have completed the tutorial. See *Where Do I Go Next?*, page 49, for additional resources.

If you have Real-Time Monitor permissions, continue with *Lesson 13: Real-Time Monitor*.

Investigative reports reference

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The information that can be displayed in an investigative report depends on what elements are already selected. If you are looking at requests by user, for example, you cannot add group information. Likewise, if you are looking at a report by category, you cannot simultaneously view risk class data.

The table below lists the types of data that can be displayed in an investigative report. If you have drilled down into the data to create a detail report, these are the columns that you can add to the report to create a custom view of the data.

Column Name	Description
User	Name of the user who made the request. User information must be available in the Log Database to include it on reports. Group information is not available in user-based reports.
Day	Date the Internet request was made.
URL Hostname	Domain (host) name of the requested site.
Domain	Directory service domain for the directory-based client (user or group, domain, or organizational unit) that made the request.
Group	Name of the group to which the requester belongs. Individual user names are not given on group-based reports. If the user who requested the site belongs to more than one group in the directory service, the report lists multiple groups in this column.
Risk Class	Risk class associated with the category to which the requested site belongs. If the category is in multiple risk classes, all relevant risk classes are listed.
Directory Object	Directory path for the user who made the request, excluding the user name. Typically, this results in multiple rows for the same traffic, because each user belongs in multiple paths. If you are using a non-LDAP directory service, this column is not available.
Action	Action the software took as a result of the request (for example, category permitted or category blocked).
Source Server	IP address of the component sending requests to Filtering Service. This may be Content Gateway, Network Agent, or a third-party integration product. With the Web Hybrid module, use this option to identify requests managed by the hybrid service from both on-site (filtered location) and off-site users.
Protocol	Protocol of the request (for example, HTTP or FTP).

Column Name	Description
Protocol Group	Master Database group in which the requested protocol falls (for example, Remote Access or Streaming Media).
Source IP	IP address of the machine from which the request was made. With the Web Hybrid module, you can use this option to review requests coming from a specific hybrid filtered location.
Destination IP	IP address of the requested site.
Full URL	Domain name and path for the requested site (example: http://www.mydomain.com/products/ref=abc123?string/). If you are not logging full URLs, this column is blank.
Month	Calendar month the request was made.
Port	TCP/IP port over which the user communicated with the site.
Bandwidth	The amount of data, in kilobytes, contained in both the initial request from the user and the response from the website. This is the combined total of the Sent and Received values.
Bytes Sent	Number of bytes sent as the Internet request. This represents the amount of data transmitted, which may be a simple request for a URL, or may be a more significant submission if the user is registering for a website, for example.
Bytes Received	Number of bytes received from the Internet in response to the request. This includes all text, graphics, and scripts that make up the site. For sites that are blocked, the number of bytes varies according to the software creating the log record. When Network Agent logs the records, the number of bytes received for a blocked site represents the size of the block page. If the log record is created by Content Gateway, as a result of analysis, the bytes received represents the size of the page analyzed. If a third-party integration product creates the log records, the bytes received for a blocked site may be zero (0), may represent the size of the block page, or may be a value obtained from the requested site.
Time	Time of day the site was requested, shown in the HH:MM:SS format, using a 24-hour clock.
Category	Category to which the request was assigned. This may be a category from the Master Database or a custom category.

Lesson 13: Real-Time Monitor

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Learn how to use Real-Time Monitor to track current Internet activity in your network. Apply filters to focus on traffic with specific characteristics.

Real-Time Monitor provides a simple view into current Internet activity in your network. You control how often the data is refreshed and how much data is available at a time, and you can apply search filters to focus on specific clients, URLs, or types of requests (blocked or permitted).

Unlike other reporting tools, Real-Time Monitor shows only current data.

- The information comes directly from Usage Monitor, which tracks client activity to generate category and protocol usage alerts.
- Each record is captured by the Real-Time Monitor database for display. The database contains a limited (configurable) number of records.
- When the Real-Time Monitor database is full, each new record overwrites an older record. Older information is no longer available in the monitor (though it is available in other reporting tools).

Real-Time Monitor shows activity for one Policy Server at a time. (Policy Server is a component responsible for coordinating other components.)

The TRITON Manager also connects to one Policy Server at a time, and Real-Time Monitor connects to that same Policy Server at launch. As long as Real-Time Monitor is displayed in the content pane, it changes its Policy Server connection each time the TRITON Manager changes its connection.

When Real-Time Monitor is open in full screen mode, it remains connected to a single Policy Server, regardless of whether the TRITON Manager connects to a different Policy Server.

- The Policy Server IP address is displayed in the Real-Time Monitor title bar.
- Multiple Real-Time Monitor instances can be run in full screen mode on the same machine, each connected to a different Policy Server.

So if you are a network security administrator, you can monitor your entire deployment by opening a Real-Time Monitor instance for each Policy Server deployed in your network.

Exercise 1: Real-Time Monitor basics

1. To launch Real-Time Monitor, go to the **Reporting > Real-Time Monitor** page.
2. Click **Start** to populate the page with data. The page shows recent Internet requests, including:
   - The IP address or name of the **user** who made the request. If user-based policy enforcement is used in your network, and the IP address is shown, mouse over an entry to see the user name.

- The **URL** requested. If the URL is truncated, mouse over an entry to see the full URL.
- Whether or not the requested site was recategorized as a result of Content Gateway analysis.

  An icon indicates that analysis resulted in dynamic recategorization of the site; no icon indicates that the Master Database or administrator-defined custom category was used. Mouse over the icon to see the original category.
- The **Category** assigned to the site. The actual category used to filter the request is shown, whether that is the Master Database category, the custom URL category, or the category dynamically assigned as a result of analysis.
- The **Action** (permitted or blocked) applied to the request.
- The **Time** the request was passed to Real-Time Monitor. Because Real-Time Monitor receives request information from Usage Monitor in real time, rather than reading the request from the Log Database, the request time shown here may not match the request time that appears in investigative and presentation reports.

3. To review current data, click **Pause** to prevent the page from continuing to refresh. When you are ready to start monitoring new information, click **Start** again.

Depending on your current settings, Real-Time Monitor holds a set number of records (250, 500, or 1000), and always displays the latest set of available records. When you pause display of new records to review current data, this can mean that the hundreds or thousands of requests that occur while the display is paused are never displayed in the monitor. (The requests are, however, stored in the Log Database, and appear in investigative and presentation reports.)

If you are a delegated administrator or reporting administrator, you have completed this tutorial. See *Where Do I Go Next?* for pointers to possible next steps.

If you are a Super Administrator, continue with *Lesson 14: Improving web protection software*.

Lesson 14: Improving web protection software

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Enable WebCatcher to send uncategorized and security URLs to Forcepoint LLC for analysis. You can also elect to send category and protocol usage data to help improve security effectiveness.

Your software includes two options that you can use to send feedback to Forcepoint:

- Enable **WebCatcher** to send unrecognized and security-related URLs to be analyzed for liability and security risks and categorized, if appropriate.

  After they are categorized, these sites are added to the Master Database for use in policy enforcement and reporting.

- To help Forcepoint continue to enhance policy management capabilities, allow your web protection software to gather category and protocol usage data.

WebCatcher

When WebCatcher sends unrecognized and security-related URLs to Forcepoint, subsequent downloads of the Master Database include improvements and category revisions resulting from WebCatcher data. Only Super Administrators can modify these settings.

Important

The information sent to Forcepoint contains only URLs. It does not include individual user information.

The following type of information is sent when you activate WebCatcher. The IP address belongs to the machine hosting the URL, not the requester.

```
<URL HREF="http://www.ack.com/uncategorized/" CATEGORY="153"
IP_ADDR="200.102.53.105" NUM_HITS="1" />
```

To enable WebCatcher:

1. Navigate to the **Settings > General > Account** page in the Web module of the TRITON Manager.
2. Under WebCatcher, mark **Send URL information to Forcepoint**.
   - To submit uncategorized URLs to be evaluated for categorization, mark **Send uncategorized URLs to improve URL categorization**.
   - To send in security-related URLs to help track malicious website activity, mark **Send security URLs to improve security effectiveness**.
   - To keep a local copy of the information for your review, mark **Save a copy of the data being sent to Security Labs**.

     When this option is enabled, WebCatcher saves the data as unencrypted XML files in the **Websense\Web Security\bin** directory on the Log Server machine. These files are date and time stamped.
   - Select the **Country of origin** for your organization. This should be the country where the majority of Internet activity is being logged.
   - Specify a **Maximum upload file size**. When the maximum size is reached, collected WebCatcher data is sent automatically and a new file is started.
   - Use the **Daily start time** field to indicate a time each day when WebCatcher should send the data it has collected if the maximum file size has not been reached.
3. Click **OK** to cache your changes, and then click **Save and Deploy** to implement them.

Category and protocol usage data

When you choose to send category and protocol usage data, the data is gathered only for pre-defined categories and protocols. Any custom categories or protocols you have defined are not included.

Forcepoint does not collect usage data from your network unless you allow it. You are given the option to disable usage data gathering during installation (it is enabled by default).

Category and protocol usage data helps Forcepoint to enhance the policy enforcement capabilities of your web protection software.

To configure collection of category and protocol usage data:

1. Navigate to the **Settings > General > Account** page.
2. Mark or clear the **Send category and protocol data to Forcepoint.** check box.
3. Click **OK** to cache your change, and then click **Save and Deploy** to implement it.

You have completed this tutorial. See *Where Do I Go Next?* for pointers to possible next steps.

6 Where Do I Go Next?

You have completed the New Admin Quick Start tutorial. You have the basic tools you need to start working with your web protection software.

There are a number of additional features that you can use to add even more precision and flexibility to your deployment. These features are described in detail in the Administrator Help (accessible via the Help button in the TRITON toolbar).

For Super Administrators:

- Configure Content Gateway analysis to provide security analysis for files and inbound and outbound content, as well as tunneled protocol detection, real-time content categorization for dynamic content, and SSL decryption.

  Go to the **Settings > Scanning > Scanning Options** page.
- Configure a variety of policy enforcement settings, including which policy to use when multiple group policies could apply, default quota time allotments and quota session length, bandwidth enforcement thresholds, and more.

  Go to the **Settings > General > Filtering** page.
- Enable alerting to ensure that administrators receive notification about potential problems with your deployment, or with users' Internet activity.

  Go to the **Settings > Alerts > Enable Alerts** page.
- Configure transparent identification agents and specify how users are identified for policy enforcement.

  Go to the **Settings > General > User Identification** page.
- Configure how much user-identifying information appears in reporting log records, and which categories are logged.

  Go to the **Settings > General > Logging** page.

For administrators with policy management permissions:

- Create custom categories or recategorize individual sites (recategorized URLs).

  Go to **Policy Management > Filter Components** and click **Edit Categories**.
- Configure protocol filters for increased control over Internet protocols, like those used for instant messaging and peer-to-peer file sharing.

  Go to **Policy Management > Filters** and click a filter name, or click **Add**.

- Define keywords to gain a higher level of control over which sites clients can access.

  Go to **Policy Management > Filter Components** and click **Edit Categories**, then select a category.

For reporting administrators:

- The Investigative Reporting Quick Start provides a step-by-step guide to uncovering the information most useful to your organization.
- The Presentation Reporting Quick Start gives comprehensive instructions for creating graphical or tabular reports for sharing.

As you explore the TRITON console, if you have questions about what a feature does or how to use a function, go to **Help > Explain This Page**.

In addition, visit the Support Portal any time to find tips, video tutorials, an extensive Knowledge Base, and product documentation.