PureSight

PureSight BCC GUI Demo Manual

October, 2002

icognito
Intelligent Content Recognition

Copyright Notice

NO WARRANTY: This technical documentation is delivered to you as-is, and iCognito makes no warranty as to its accuracy or use. Any use of the technical documentation, or the information contained therein, is at the user's risk. Technical or other inaccuracies, as well as typographical errors, may occur in this document. iCognito reserves the right to make changes without prior notice.

Trademark

Technical Support

If you require technical support services, contact us at support@icognito.com.

About This Manual

This manual provides instructions for installing and demonstrating the capabilities of PureSight via the PureSight BCC GUI Demo. It contains the following chapters:

Chapter 1, Installation, provides step-by-step instructions for the PureSight BCC GUI Demo installation procedure and describes basic configuration features.

Chapter 2, Step-by-Step guide, provides instructions for adding users and groups of users, setting up policies, configuring PureSight filters and generating reports.

Table of Contents

Chapter 1

Installation

This chapter describes the PureSight BCC GUI Demo installation procedure and how to check if the installation was successful. It also details the system requirements and introduces the basic configuration policies.

System Requirements

The following minimum system requirements must be met in order to run PureSight BCC GUI Demo:

The equivalent of Pentium ||| processor or higher

64 MB RAM (minimum)

15 MB of free disk space

Microsoft Windows NT 4.0 or Microsoft Windows 2000, or Microsoft Windows XP Pro

Microsoft Internet Explorer (IE) 5 or higher

Before You Begin

It is recommended that you remove any previous installations of PureSight client and PureSight server products before installing new versions of PureSight. Refer to the appropriate installation guide for instructions on how to remove PureSight.

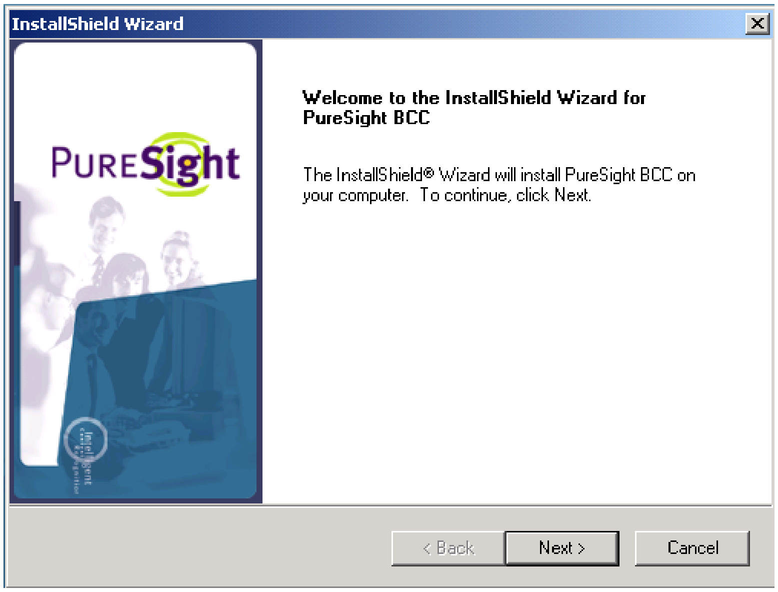
Installing PureSight BCC GUI Demo

The PureSight BCC GUI Demo is installed via a self-extracting installation file, **PureSight_GUI_EN.exe**. The installation process installs an Apache web server, which is used to activate the PureSight GUI, the PureSight GUI files, and optionally, an open LDAP server from which to retrieve users, in order to present the directory user functionality.

The application files are placed by default in the directory **C:\Program Files\iCognito LTD\PureSight BCC**

➢ **To install PureSight BCC GUI Demo:**

1. Log in with administrator privileges.
2. Close all open applications and windows.
3. Double-click **PureSight_GUI_EN.exe** to run the PureSight installation program. The *Welcome* window of the PureSight BCC GUI Demo Setup wizard is displayed.



InstallShield Wizard

Welcome to the InstallShield Wizard for PureSight BCC

The InstallShield® Wizard will install PureSight BCC on your computer. To continue, click Next.

4 Click **Next**. The *License Agreement* window is displayed. Select **I accept the terms of the license agreement** to accept the licensing terms.

5 Click **Next**. The *Customer Information* window is displayed. Enter the required information.

6 Click **Next**. The *Choose Destination Location* window is displayed. If required, use the **Browse** button to change the default directory.

7 Click **Next**. The *Select Options* window is displayed. Make sure the required components to be installed are checked.

8 Click **Next**. The *Administration Password* window is displayed. Enter the required password in the **Password** field and reenter it in the **Confirm** field. This password is needed to access the PureSight BCC, in order to define PureSight's configuration options.

9 Click **Next**. The *PureSight User Interface Port Number* window is displayed, containing the default port number **7008**. To change the default value, enter a new value greater than 1024.

10 Click **Next**. The *Select Program Folder* window is displayed. Select the required folder.

11 Click **Next**. The *Setup Complete* window is displayed. Click **Finish** to complete the installation.

PureSight should now appear in the *Start→Programs* submenu as **PureSight BCC→PureSight BCC**.

Running PureSight BCC GUI Demo

➢ **To run the PureSight BCC GUI Demo:**

1 Select **PureSight BCC->PureSight BCC** from the ***Start → Programs*** menu.

2 The default browser application will open displaying the PureSight BCC GUI login page.

Setting the license key

After successful installation it is required to enter the PureSight license key. In order to receive a license key, open the **PureSight BCC** and follow the onscreen instructions in the **PureSight Administration** screen.

➢ **To set the license key:**

1 Run the PureSight BCC GUI Demo. The BCC login screen is displayed, requiring a license key. The machine specific Network ID is provided, as well as a link to receive a trial license key.

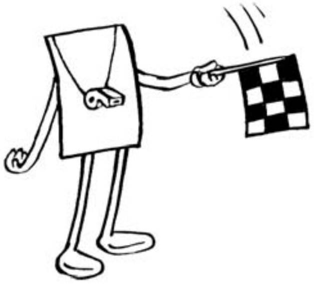
2 Click on **Click here** to receive a license key. A new browser window is opened, directed to iCognito trial license request form. Enter a valid email address, to which the license key will be sent.

3 Click on **Submit**. Within a few minutes, the license key will be received in the given mail box.

4 In the BCC login screen enter the new license key.

NOTE:

Both the Network ID and the license key are case sensitive, therefore it is recommended to copy and paste them rather than writing them down.



Chapter 2

Step-by-Step Configuration

Users and Groups

PureSight enables you to define users or groups of users within your organization, and to then assign specific filtering policies to those users and groups.

Users are identified by an IP address or subnet, or by directory username. The policies available are all policies defined in PureSight.

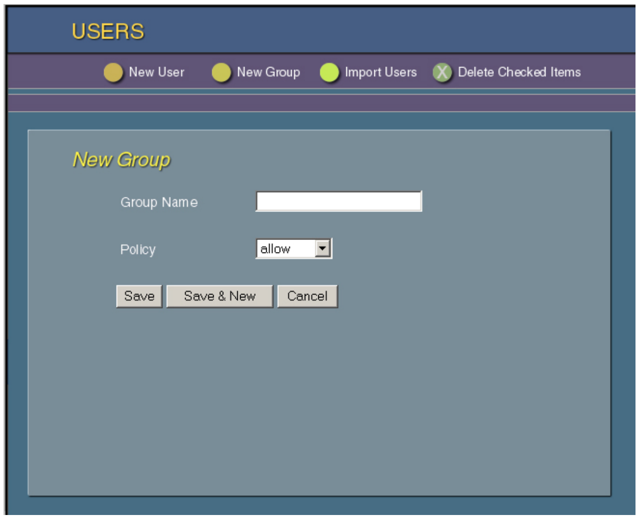
All users that are not specifically defined in the *Users* pane are automatically filtered according to the defined default policy.

Adding New Groups

To create a new group, you first define the group name and assign a policy to that group. You can then assign as many users as you want to the group.

➢ **To add a new group:**

1 In the *Users* pane, click the **New Group** button. The *New Group* pane is displayed.



2 Enter the new group name in the **Group Name** field.

3 Click the arrow in the **Policy** field and select a policy for the group from the dropdown list.

4 Click **Save** to add the group and return to the *Users* pane,

or

Click **Save & New** to add another new group.

Each new group is automatically added to the **All Users & Groups** tree in the *Users* pane.

Adding New Users

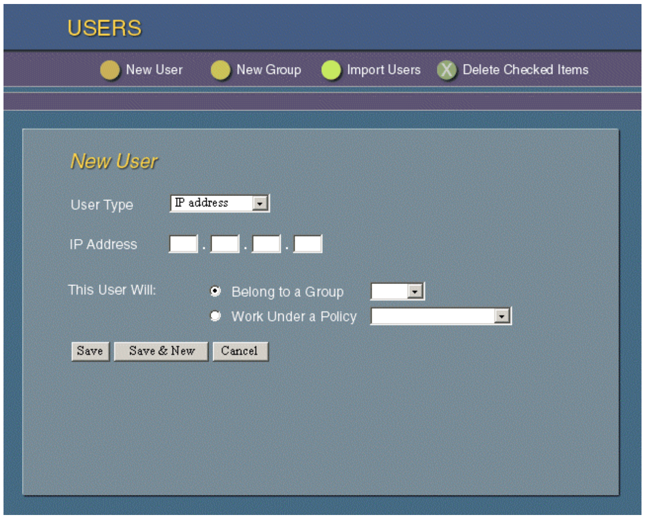
A new user can be a single IP address, a Subnet (range of IP addresses) or a directory user, and can be assigned a policy directly or be assigned to a group. All users in a group inherit the policy defined for that group.

NOTE:

Each user can only be defined once. Make sure that subnets do not overlap other subnets or individual defined IP addresses.

➢ **To add a new user(s):**

1) In the *Users* pane, click the **New User** button. The *New User* pane is displayed.



User Type: IP address

● Belong to a Group

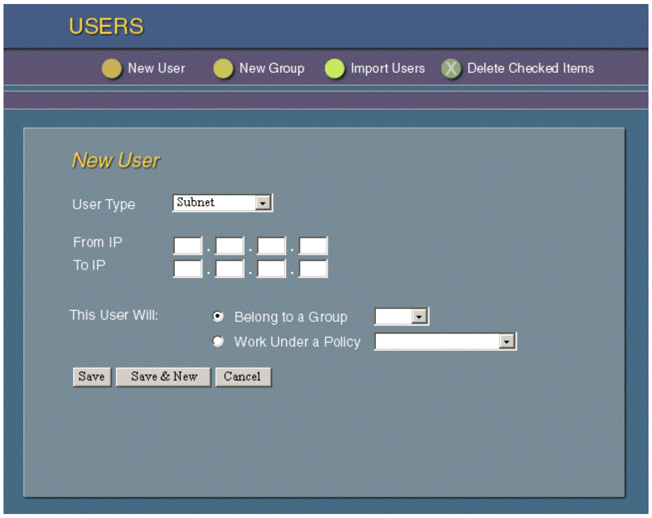
○ Work Under a Policy

2) Select a **User Type** in the dropdown box.

1. If you selected **IP Address** as the user type, enter the new user's IP address in the **IP Address** field.

   or

2. If you selected **Subnet** in the **User Type** dropdown box then enter the relevant range start and end IP addresses in the **From IP** and **To IP** fields.



User Type: Subnet

From IP: . . .

To IP: . . .

This User Will: ● Belong to a Group ○ Work Under a Policy

or

3. If you selected **Directory user** in the **User Type** dropdown box, a list of domains / context is displayed according to the Directory Settings defined. Refer to *Settings*, for more information about directory server settings.

NOTE:

Directory Server settings must be set before adding a new directory user.

Policies

A policy defines when and what to filter. It consists of a group of one or more filters, with a defined operating schedule for the policy. The filters in a policy are active according to the policy schedule, and their active status can be defined as allow, block or warn.

There are three main types of policies:

> **Allow all except**: *Permits* access to all sites apart from those defined in the filters included in the policy. For example, the policy may permit access to all sites except gambling sites.
>
> **Block all except**: *Denies* access to all sites apart from those defined in the filters included in the policy. For example, the policy may deny access to all sites except the Intranet.
>
> **Monitor**: *Monitors* activity on all filters according to the policy schedule, without blocking any access, for reporting purposes.

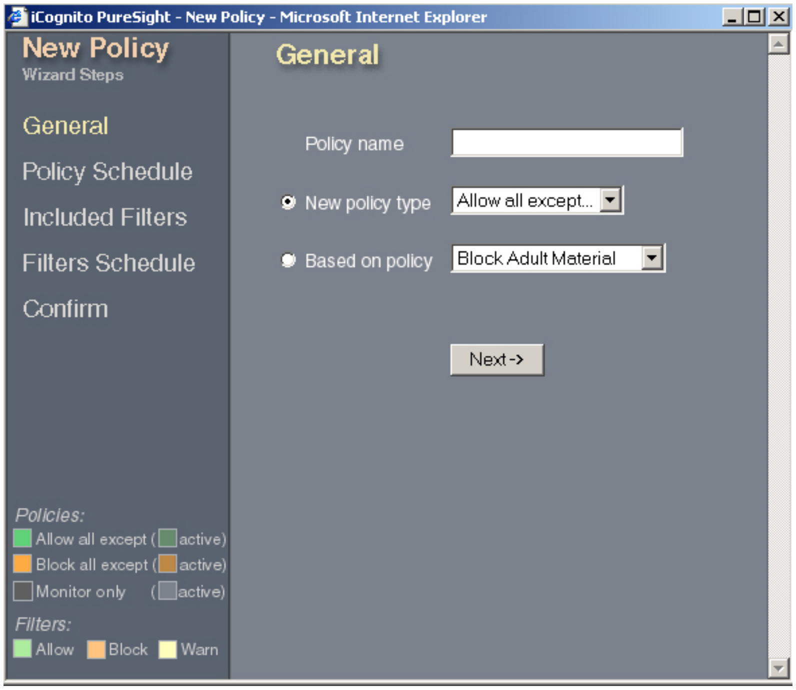
If you want to include your own customized filters in a policy, or additional bandwidth filters beyond those currently defined in PureSight, you must first define these filters. Refer to *Filters* for more information.

Once a policy has been created, it is automatically added to the lists of available policies for assigning to users and groups, and for use as the default policy.

Defining a New Policy

New policies are created using the New Policy Wizard.

To access the New Policy Wizard, click the **New Policy** button in the *Policies* pane. The New Policy Wizard is displayed in a new browser page. The left side menu displays five steps that guide you logically through the process of creating a new policy and the color scheme used for the policy schedules. The workspace displays the step that is currently selected.



iCognito PureSight - New Policy - Microsoft Internet Explorer

New Policy

Wizard Steps

General

Policy Schedule

Included Filters

Filters Schedule

Confirm

Policies:

🟩 Allow all except (🟩 active)

🟧 Block all except (🟧 active)

□ Monitor only (□ active)

Filters:

🟩 Allow 🟧 Block 🟨 Warn

General

Policy name

● New policy type: Allow all except...

○ Based on policy: Block Adult Material

The New Policy Wizard steps are:

Step 1: General: Enables you to define a name and type for the policy.

Step 2: Policy Schedule: Enables you to define the schedule for the policy.

Step 3: Included Filters: Enables you to define the filters you want to include in the policy.

Step 4: Filters Schedule: Enables you to refine the schedule for each filter.

Step 5: Confirm: Enables you to view and confirm the policy and filter schedules.

Some of the steps are divided into substeps. Clicking **Next** at the bottom of each pane takes you on to the next step or substep. You can click **Back** at any stage of the process to return to previous steps. The currently open step or substep is highlighted in the side menu.

Step 1: General

The *General* pane, shown on the previous page, requires you to enter a name for the new policy. You can either select the type of policy you want to create or create a new policy based on an existing one. The policy type options are **Allow all except** (the default setting), **Block all except** and **Monitor**.

➢ **To define general policy data:**

1 Enter the name for the policy in the Policy name field. The name must be unique.

2 In the Policy type field, select the required option from the dropdown list.

or

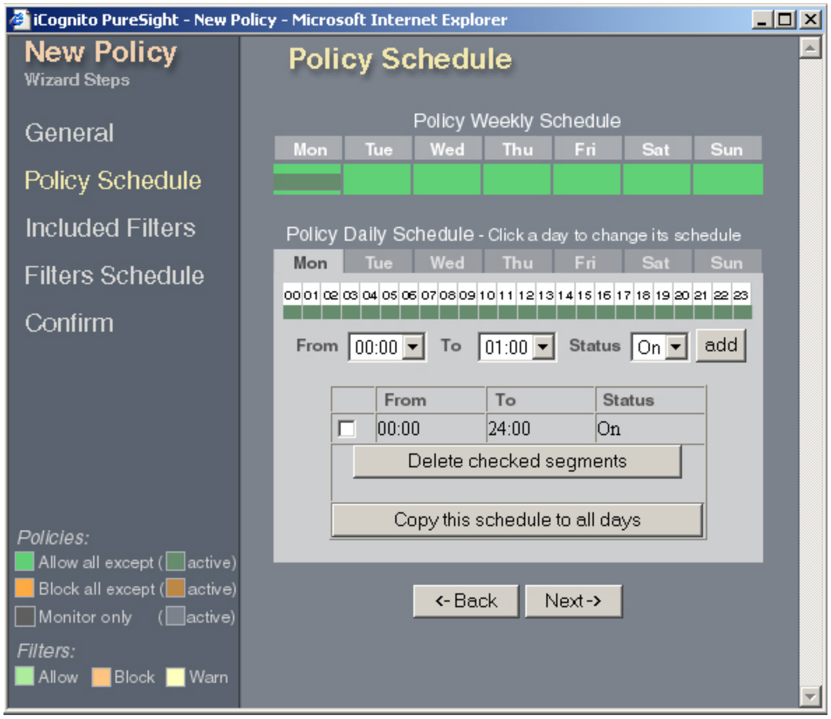
3 In the Based on Policy field, select the required policy from the dropdown list.

4 Click Next to proceed to the next step of the wizard.

Step 2: Policy Schedule

A policy schedule defines the working days and hours of the policy. The *Policy Schedule* pane, shown on the following page, enables you to define a separate schedule for each day of the week. When defining a new policy, the schedule for the policy is **Off** at all times. You must add a schedule in order for the policy to be activated.

For each day, you can define time periods during which the policy will be **On**, meaning that the filters are active, or **Off**, meaning that the filters are inactive. The filters included in a policy can be active only when the policy itself is **On**. Once a daily schedule is set for one of the days, it can be copied to rest of the days in the week.



iCognito PureSight - New Policy - Microsoft Internet Explorer

New Policy
Wizard Steps

- General
- Policy Schedule
- Included Filters
- Filters Schedule
- Confirm

Policies:
🟩 Allow all except (▨ active)
🟧 Block all except (▨ active)
□ Monitor only (▨ active)

Filters:
🟩 Allow 🟧 Block □ Warn

Policy Schedule

Policy Weekly Schedule

Mon	Tue	Wed	Thu	Fri	Sat	Sun

Policy Daily Schedule - Click a day to change its schedule

Mon	Tue	Wed	Thu	Fri	Sat	Sun

00 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23

From 00:00 To 01:00 Status On add

	From	To	Status
□	00:00	24:00	On

Delete checked segments

Copy this schedule to all days

<- Back Next ->

The *Policy Schedule* pane contains the following areas:

Policy Weekly Schedule: Indicates the schedule defined for that policy for each day of the week.

Policy Daily Schedule: Indicates the times when the policy is active or inactive for each individual day, and enables you to define active or inactive time periods for each day. Every modification to the time periods is automatically updated to the Policy Weekly Schedule.

➢ **To define a policy schedule:**

1 In the Policy Schedule pane, click the appropriate day tab in the Policy Daily Schedule area. The tab for the selected day is displayed.

2 To select the times when you want the policy to be active or inactive, click the arrows in the To and From fields and select the times from the dropdown lists.

3 To define the status of the policy during the selected time period, click the arrow in the Status field and select On (policy active) or Off (policy inactive) from the dropdown list.

4 Click Add to add the time period to the schedule for that day. The selected times and status are displayed in the table below the fields, and are indicated by colored blocks in the weekly and daily schedule grids. The color of the blocks represents the different activation modes (On and Off).

5 Repeat steps 2 through 4 for each time period you want to add to the schedule for that day.

6 To remove a defined time period, select the checkbox next to the time period in the table and click Delete checked segments. The time period is deleted from the table and the schedule grids.

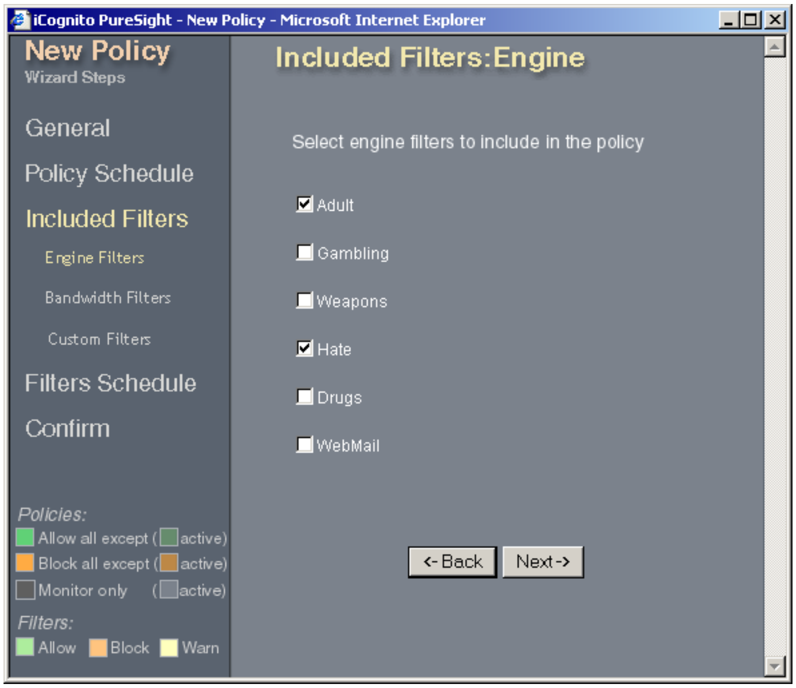
7 Repeat the entire procedure described above for each day, or use the “Copy this schedule to all days button”.

8 Click Next to proceed to the next step of the wizard.

Step 3: Included Filters

The **Included Filters** step of the New Policy Wizard enables you to define the filters to be included in the policy. The included filters automatically inherit the policy schedule: in an **Allow all except** policy, the filters are set to block, and in a **Block all except** policy, the filters are set to allow. Only filters that are relevant to the type of policy are displayed and available for selection.

The **Included Filters** step is divided into three substeps: **Engine Filters**, **Bandwidth Filters** and **Custom Filters**. The following example displays the *Included Filters: Engine* pane.



Included Filters:Engine

Select engine filters to include in the policy

☑ Adult

□ Gambling

□ Weapons

☑ Hate

□ Drugs

□ WebMail

For more information about the filters, refer to *Chapter 4*, *Defining Filters*.

NOTE:

The **Included Filters** step is not available for the Monitor policy type.

➢ To define which filters to include:

1 In the Included Filters: Engine pane, select the engine filters you want to include in the policy and click Next.

2 The Included Filters: Bandwidth pane is displayed. Select the Include Bandwidth Filter in this policy checkbox if you want to include the bandwidth filter in the policy.

3 Select the file extensions and protocols that you want to include in the policy and click Next.

4 The Included Filters: Custom pane is displayed. Select the custom filters you want to include in the policy.

5 Click Next to proceed to the next step of the wizard.

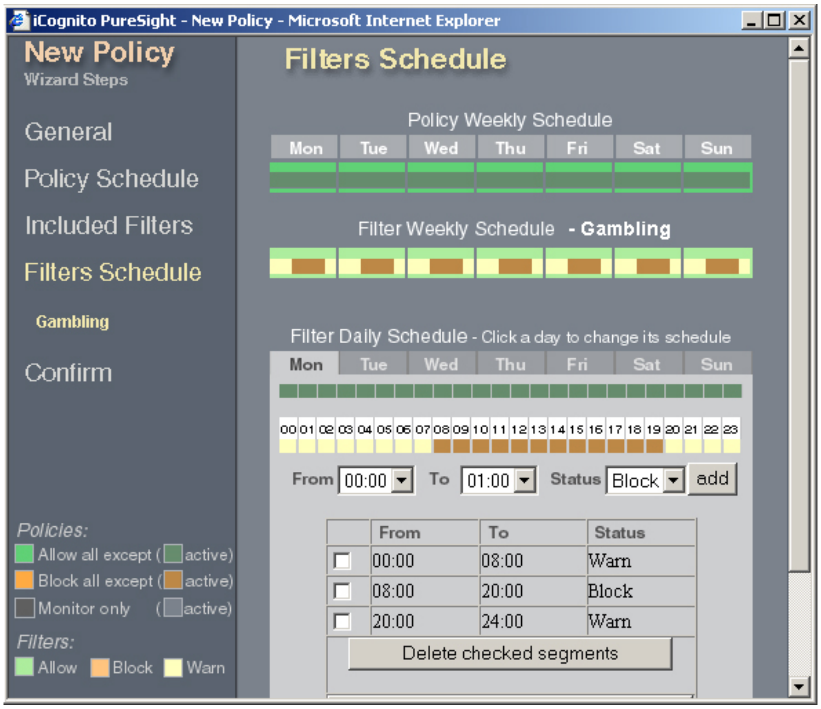
Step 4: Filters Schedule

The **Filters Schedule** step enables you to define individual schedules for each filter included in the policy, and to configure the PureSight **Warn** option.

By default, each filter inherits the policy schedule, as defined in *Step 2: Policy Schedule*. If required, changes can be made in the filter schedule to override the policy schedule settings; however, a filter can only be active at times that the policy is active. For example, a policy that is active from 09:00 to 17:00 can be edited so that a particular filter only blocks from 09:00 to 13:00. In addition, you can edit a filter schedule so that a warning is returned about a requested site, rather than blocking it.

The filters defined in the **Included Filters** step are automatically added as substeps in the **Filters Schedule** step.

The example below shows the *Filter Schedule* pane for the Gambling engine filter:



From 00:00 To 01:00 Status Block

	From	To	Status
□	00:00	08:00	Warn
□	08:00	20:00	Block
□	20:00	24:00	Warn

The *Filters Schedule* pane contains the following areas:

Policy Weekly Schedule: Indicates the schedule defined for the policy for each day of the week.

Filter Weekly Schedule: Indicates the schedule defined for that filter for each day of the week.

Filter Daily Schedule: Indicates the times when the filter is blocking, allowing or warning on each individual day, and enables you to edit the filter schedule for each day. Each modification is automatically updated to the Filter Weekly Schedule.

NOTE:

Time periods defined in the filters schedule must be within the periods that the policy is active.

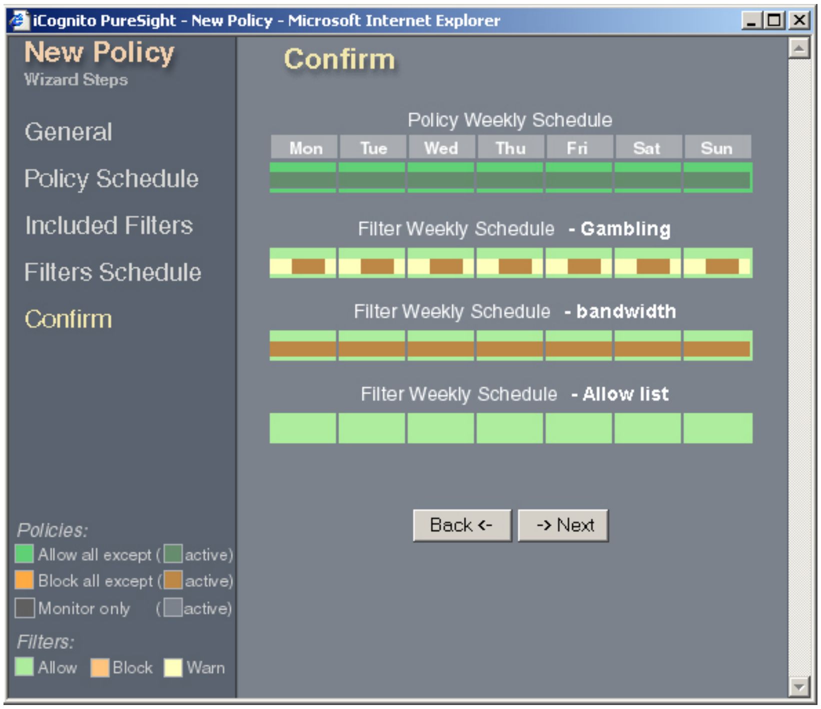
The following procedure should be repeated as necessary for each **Filters Schedule** substep.

➢ **To edit the filters schedule:**

1. In the Filters Schedule pane, click the appropriate day tab in the Filter Daily Schedule area. The tab for the selected day is displayed.
2. Click the arrows in the To and From fields and select the required times from the dropdown lists.
3. To define the status of the filter during the selected time period, click the arrow in the Status field and select Allow, Block or Warn from the dropdown list.
4. Click Add to add the change to the schedule for that day. The selected times and status are displayed in the table below the fields and are indicated by colored blocks in the filter weekly and daily schedule grids.
5. Repeat steps 2 through 4 for each change to the filter schedule for that day.
6. To remove a defined time period, select the checkbox next to the time period in the table and click Delete checked segments. The time period is deleted from the table and the schedule grids.
7. Repeat the entire procedure described above for each day, or use the Copy this schedule to all days button.
8. Click Next to proceed to the next step of the wizard.

Step 5: Confirm

The *Confirm* pane, shown below, gives an overall summary view of the new policy that you created using the New Policy Wizard.


iCognito PureSight - New Policy - Microsoft Internet Explorer
New Policy
Wizard Steps
General
Policy Schedule
Included Filters
Filters Schedule
Confirm
Policies:
Allow all except (active)
Block all except (active)
Monitor only (active)
Filters:
Allow
Block
Warn
Confirm
Policy Weekly Schedule
Mon
Tue
Wed
Thu
Fri
Sat
Sun
Filter Weekly Schedule - Gambling
Filter Weekly Schedule - bandwidth
Filter Weekly Schedule - Allow list
Back <-
-> Next

The *Confirm* pane displays the following information:

> **Policy Weekly Schedule**: This grid summarizes the weekly schedule created for the new policy.
>
> **Filter Weekly Schedule**: A grid is displayed for each filter included in the policy. This grid summarizes the weekly schedule for the filter.

If you want to make additional changes to the weekly schedules, click **Back** until you reach the relevant pane and make the required changes.

➢ **To confirm the new policy:**

1. Click Next to confirm the new policy. The Confirm pane displays a message confirming that the new policy was successfully created.
2. Close the New Policy Wizard. The new policy now appears in the Policies tree in the main Policies pane.

Assigning users to the policies is done from the *Users* pane. Refer to *Users and Groups* for more details.

Filters

PureSight filters define the type of information that can be blocked, allowed or warned against in the different filtering policies. PureSight contains three different types of filters:

Engine Filters: Internet categories that the PureSight engine can identify, and handle accordingly.

Bandwidth Filters: Bandwidth consuming files that can be prevented.

Custom Filters: User-defined lists of sites to be blocked, allowed or warned against. These lists are independent of PureSight's categorization process.

The main *Filters* pane containing the **Engine**, **Bandwidth** and **Custom Filters** tabs is accessed from the menu in the BCC side bar by clicking **Filters**.

Reports

PureSight monitors general Internet usage in your organization, as well as activity of the filters. This information is automatically saved in a defined log file, and can be used to generate up-to-date reports at any time.

PureSight provides a number of different types of reports. The definable parameters for each report enable you to generate and view data according to your specific requirements. For example, you can generate reports for a specific user or for a defined time period.

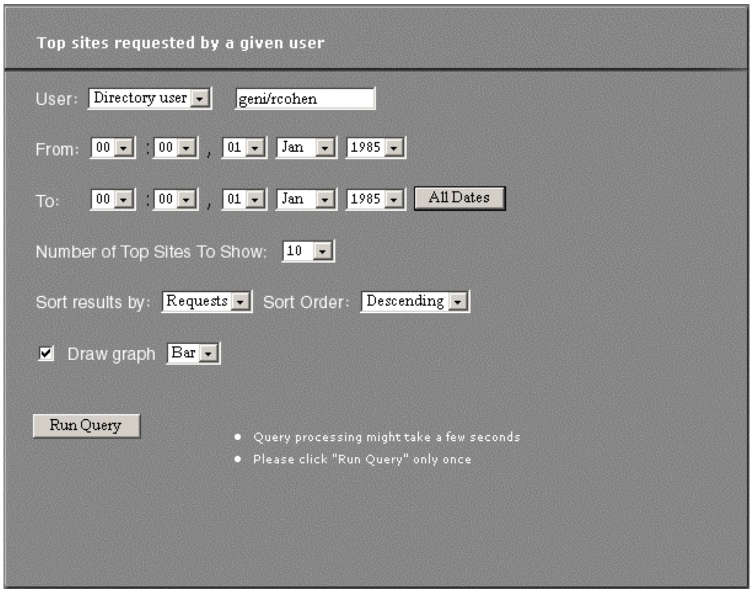
Generating a Report

For each report, you can specify parameters to focus the report on your particular area of interest. You can also define the format of the generated report data. There are default settings for all report parameters.

The following procedure describes the configuration process for one report example. Other possible report parameters that are not included in the example are listed at the end of the procedure on page **Error! Bookmark not defined.**

➢ **To generate a report:**

1 Click the required report in the main *Reports* pane. The parameters for the selected report are displayed in the workspace. The example below displays parameters for **Top sites requested by a given user**, for a directory user.



Top sites requested by a given user

User: Directory user geni/rcohen

From: 00 : 00 , 01 Jan 1985

To: 00 : 00 , 01 Jan 1985 All Dates

Number of Top Sites To Show: 10

Sort results by: Requests Sort Order: Descending

☑ Draw graph Bar

Run Query

- Query processing might take a few seconds
- Please click "Run Query" only once

2 From the drop down list, select **All Users** to include all users in the report,

or

Select **IP Address** and enter the relevant IP address to focus the report,

or

Select **Directory User** and enter the relevant directory username to generate a report on a specific user.

3 In the **From** and **To** fields, define the time range of the report by selecting the required time (in hours and minutes), day, month and year from the dropdown lists. In order to present all data available in the PureSight logs, select the All Dates button.

4 In the **Number of Top Sites to Show** field, select a value from the dropdown list to limit the number of sites included in the report.

5 In the **Sort results by** field, select from the dropdown list the parameter on which the report is to be based. The options available depend on the report.

6 In the **Sort Order** field, select **Ascending** or **Descending** from the dropdown list to specify the order in which data is displayed in the report.

7 Select the **Draw graph** checkbox to include a graphical display of the report data, and select a graph type (**Bar** or **Pie**) from the dropdown list.

8 Click the **Run Query** button to generate the report. In the example below, the **Top Sites Requested by User** report is displayed as a bar graph and table.

Settings

Blocking and Warning Messages

When a user requests a site that is either blocked or warned against, an appropriate message is returned to the user's workstation. This may be a redirection to a URL or a text message displayed in the browser. PureSight can be configured to use an internal URL for your organization, or to use your own text for the message. Default URL and message options are supplied with PureSight.

Directory Server Settings

The **Directory Server** tab enables you to define Directory Server settings. Configuring directory server settings enables PureSight to retrieve Directory users and apply policies and generate reports based on these Directory user names.

PureSight support the following Directory Servers:

LDAP Directory Servers: iPlanet, Novell, and other custom LDAP servers.

Windows Active Directory

Windows Domain

➢ **To set Directory Server settings**

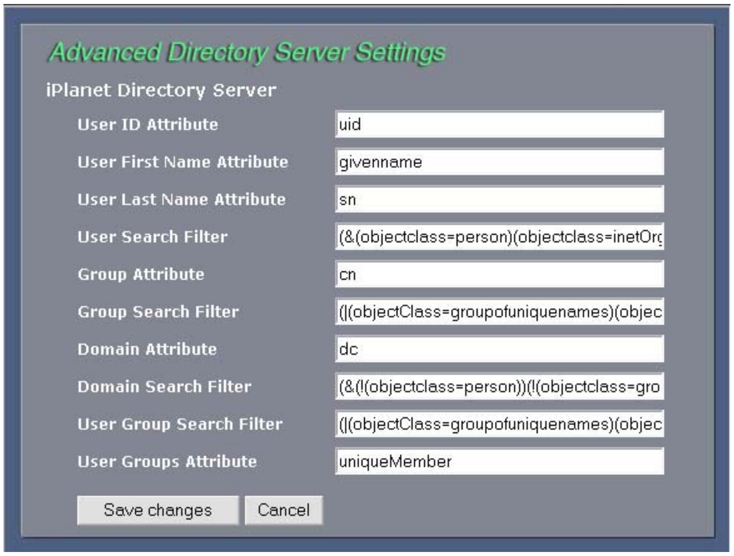
1 In the *Settings* pane, click the **Directory Server** tab. The **Directory Server** tab is displayed.

2 Select the appropriate directory server in the dropdown list box. According to the type of the Directory Server selected, the appropriate settings for each selection are displayed.

3 Enter the values for the Server Address, Server Port to connect to, Server Base DN, Administrator DN and Administrator Password, if required.

4 To save, click **Save Changes**.

5 If required, click **Advanced Settings,** to customize attributes and filters, and enter the fields, as shown below in *the Advanced Directory Server Settings* pane for the iPlanet Directory Server.



Advanced Directory Server Settings

iPlanet Directory Server

User ID Attribute	uid
User First Name Attribute	givenname
User Last Name Attribute	sn
User Search Filter	(&(objectclass=person)(objectclass=inetOrg
Group Attribute	cn
Group Search Filter	(|(objectClass=groupofuniquenames)(objec
Domain Attribute	dc
Domain Search Filter	(&(!(objectclass=person))(!(objectclass=gro
User Group Search Filter	(|(objectClass=groupofuniquenames)(objec
User Groups Attribute	uniqueMember

6 When finished, click **Save changes**.

NOTE:

The BCC GUI Demo, if installed with open LDAP, then by default the directory server that is defined is the open LDAP server.

Advanced Settings

The log is used to log user requests and system performance, in order to generate comprehensive reports. Refer to *Chapter 7 of the User Manual*, *Reports*, for more information on generating reports.

The URL Cache is used to save classifications of recently classified requests.

PureSight BCC enables you to configure the size and storage location for both the cache and the log. You may want to limit file size due to disk space considerations; however, it is advisable to define the largest cache size your system can support to facilitate better performance. In addition, you can configure the expiration of classifications in the URL Cache. After the specified time passes, a request for the same page will be reclassified to support content changes in the requested page.

System Settings

The **System** tab enables you to set a new PureSight Administrator password and to enter a new PureSight license key.

The PureSight Administrator password is used to access the BCC.

The PureSight license key defines the license type of the PureSight software - trial license limited for a trial period or permanent license. To change a license type, it is necessary to change the license key.