



# M86 Enterprise Reporter

# **USER GUIDE**

## Web Client Application

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# **M86 ENTERPRISE REPORTER WEB CLIENT USER GUIDE**

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Part# ERC-UG\_v1.01-1006

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# INTRODUCTORY SECTION

## Enterprise Reporter

Though many companies have Internet filtering solutions to prevent employees from accessing inappropriate, non-work related Web sites, simply blocking these sites is not enough. Administrators want the ability to know who is accessing which site, the duration of each site visit, and the frequency of these visits. This data can help administrators identify abusers, develop policies, and target sites to be filtered, in order to maximize bandwidth utilization and productivity.

The Enterprise Reporter (ER) from M86 Security is designed to readily obtain this information, giving the user the ability to interrogate massive datasets through flexible drill-down technology, until the desired view is obtained. This “view” can then be memorized and saved to a user-defined report menu for repetitive, scheduled execution and distribution.

## Operations

In simplified terms, the ER operates as follows: the ER Server accepts log files (text files containing Web access data) from a source device such as the M86 Web Filter. M86 Security’s proprietary programs “normalize” the transferred data and insert them into a MySQL database. The ER Web Client reporting application accesses this database to generate a virtually unlimited number of queries and reports.

## About this User Guide

The Enterprise Reporter Web Client User Guide addresses the administrators designated to configure the ER Server and the ER Client, and the sub-administrator(s) given permission by the Client administrator to use the Client.

This user guide is organized into the following sections:

- **Introductory Section** - This section provides an overview and information on how to use this user guide to help you access the Client and become familiarized with the application.
- **Administrator Section** - This section includes information for administrators to configure the Client application.
- **Client User Section** - This section includes information on using the Client application to generate reports.
- **Technical Support Section** - This section contains information on technical support coverage.
- **Appendices Section** - Appendix A provides information on how to use the ER Client in the evaluation mode, and how to switch to the activated mode. Appendix B includes information on configuring Lotus Notes to work with Client application reports, instead of Microsoft Outlook. Appendix C explains how to disable pop-up blocking software installed on a workstation in order to use the Client. Appendix D includes a glossary of terms used in this user guide.
- **Index** - This section includes an index of topics and the first page numbers where they appear in this user guide.

# How to Use this User Guide

## ***Conventions***

The following icons are used throughout this user guide:



***NOTE:*** The “note” icon is followed by italicized text providing additional information about the current topic.



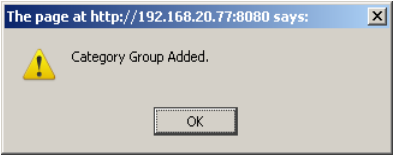



***TIP:*** The “tip” icon is followed by italicized text giving you hints on how to execute a task more efficiently.



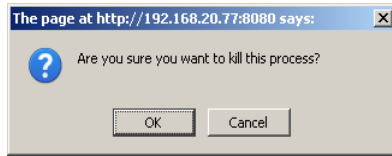
***WARNING:*** The “warning” icon is followed by italicized text cautioning you about making entries in the application, executing certain processes or procedures, or the outcome of specified actions.

## Terminology

The following terms are used throughout this user guide. Sample images (not to scale) are included for each item.

- **alert box** - a message box that opens in response to an entry you made in a dialog box, window, or screen. This box often contains a button (usually labeled “OK”) for you to click in order to confirm or execute a command.  

- **arrow** - a triangular-shaped object or button that displays in a window or on a screen. When displayed as a non-stationary object, the arrow points to the item that was selected in a list. When displayed as a button, the arrow is static. By clicking on this button, depending on the direction of the arrow, the previous item or the next item in a list displays or is selected.  

- **button** - an object in a dialog box, window, or screen that can be clicked with your mouse to execute a command.  

- **checkbox** - a small square in a dialog box, window, or screen used for indicating whether or not you wish to select an option. This object allows you to toggle between two choices. By clicking in this box, a check mark or an “X” is placed, indicating that you selected the option. When this box is not checked, the option is not selected.  


- **dialog box** - a box that opens in response to a command made in a window or screen, and requires your input.



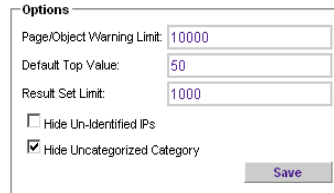
You must choose an option by clicking a button (such as “Yes” or “No”, or “Next” or “Cancel”) to execute your command. As dictated by this box, you also might need to make one or more entries or selections prior to clicking a button.

- **field** - an area in a dialog box, window, or screen



that either accommodates your data entry, or displays pertinent information. A text box is a type of field.

- **frame** - a boxed-in area in a dialog box, window, or screen that includes a group of objects such as fields, text boxes, list boxes, buttons, and/or radio buttons. Objects within a frame belong to a specific function or group. A frame often is labeled to indicate its function or purpose.



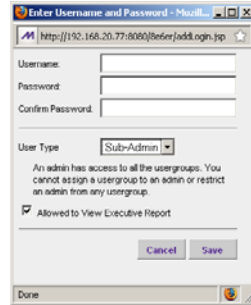
- **icon** - a small image in a dialog box, window, or screen that can be clicked. This object can be a button or an executable file.



- **list box** - an area in a dialog box, window, or screen that accommodates and/or displays entries of items that can be added or removed.



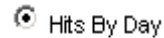
- **pop-up box or pop-up window** - a box or window that opens after you click a button in a dialog box, window, or screen. This box or window may display information, or may require you to make one or more entries. Unlike a dialog box, you do not need to choose between options.



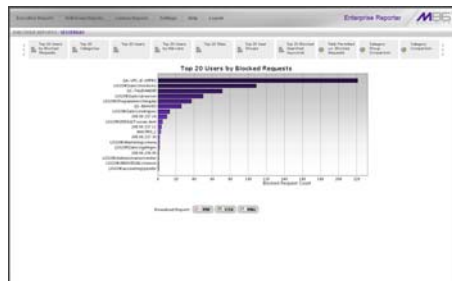
- **pull-down menu** - a field in a dialog box, window, or screen that contains a down arrow to the right. When you click the arrow, a menu of items displays from which you make a selection.



- **radio button** - a small, circular object in a dialog box, window, or screen used for selecting an option. This object allows you to toggle between two choices. By clicking a radio button, a dot is placed in the circle, indicating that you selected the option. When the circle is empty, the option is not selected.



- **screen** - a main object of an application that displays across your monitor. A screen can contain windows, frames, fields, text boxes, list boxes, icons, buttons, and radio buttons.



- **text box** - an area in a dialog box, window, or screen that accommodates your data entry. A text box is a type of field.





- **thumbnail** - a small image in a window or on a screen that when clicked displays the same image enlarged within a window or on the screen.
- **window** - displays on a screen, and can contain frames, fields, text boxes, list boxes, icons, buttons, and radio buttons. Types of windows include ones from the system such as the Save As window, pop-up windows, or login windows.



## Getting Started

This sub-section helps the Client administrator and Client sub-administrator become familiarized with basic log in and log out procedures, and navigating the screen of the ER Client.

Before getting started, the ER Server administrator needs to install the necessary ER hardware and software components, as described in the following Administrator Section. The ER Client administrator should then set up his/her unique password for accessing the Client. Finally, the Client administrator must set up each designated sub-administrator with permissions in order for an authorized user to use the ER Client.

### ***Procedures for Logging On, Off***

#### **Access the ER Web Client Login window**

---

If using a standard Enterprise Reporter, the ER Web Client user interface is accessible by launching an Internet browser window supported by the ER Web Client and then entering the ER Web Client's URL in the Address field (see Enter ER Web Client's URL in Address field).

If using an IR unit, in addition to the method described above, the user interface is also accessible by launching an Internet browser window supported by the ER Web Client, entering the IR's URL in the Address field, and then clicking a button in the IR splash screen (see Access ER Web Client from the IR Portal).

## Access ER Web Client from the IR Portal


1. From your workstation, launch a version-supported Internet Explorer, Firefox, or Safari browser window.
2. In the address line of the browser window, type in “https://” and the IR Server’s IP address or host name, and use port number “:1443” for a secure network connection.

For example, if your IP address is 210.10.131.34, type in **https://210.10.131.34:1443**. Using a host name example, if the host name is logo.com, type in **https://logo.com:1443**.

3. Click the Enterprise Reporter icon in the IR Welcome window:



Fig. 1:1-1 Enterprise Reporter icon in IR Welcome window

 **NOTE:** If pop-up blocking software is installed on the workstation, it must be disabled. Information about disabling pop-up blocking software can be found in Appendix C: Disable Pop-up Blocking Software.

Clicking the Enterprise Reporter icon opens a separate browser window/tab containing the ER Web Client Login window (see Fig. 1:1-2).

## Enter ER Web Client's URL in Address field

1. From your workstation, launch a version-supported Internet Explorer, Firefox, or Safari browser window.
2. In the address line of the browser window, type in "https://" and the ER Web Client's IP address or host name, and use port number ":8443" for a secure network connection, plus "/8e6er/".

For example, if your IP address is 210.10.131.34, type in **https://210.10.131.34:8443/8e6er/**. Using a host name example, if the host name is logo.com, type in **https://logo.com:8443/8e6er/**.

With a secure connection, the first time you attempt to access the ER Web Client's user interface in your browser you will be prompted to accept the security certificate. In order to accept the security certificate, follow the instructions at: **<http://www.m86security.com/software/8e6/docs/ig/misc/sec-cert-er.pdf>**

3. After accepting the security certificate, click **Go** to open the ER Web Client Login window (see Fig. 1:1-2).

## Log In

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**NOTE:** *A maximum of eight users can use the Web Client simultaneously. However, for optimum results, M86 Security recommends no more than four users generate reports at the same time.*

1. In the login window, type in the generic Username **manager**, and Password **8e6Report**, if you have not yet set up your own user name and password. Otherwise, enter your personal **Username** and **Password**:

Fig. 1:1-2 Login window

2. Click **Login** to open the application.

 **TIPS:** In any box or window in the Client, press the **Tab** key on your keyboard to move to the next field. To return to a previous field, press **Shift-Tab**.

Administrators who access the Client application for the first time should change the administrator password. This ensures that only the administrator will be able to access information for all user groups. The administrator username and password is modified in the User Permissions window, accessible via User Permissions option from the Settings menu. (See the Web Client Administrator Section for information on the User Permissions window.)


 **NOTE:** If your password has been set by the administrator to expire after a specified number of days, upon clicking the **Login** button, the login window re-displays with a message informing you that your password has expired.

Fig. 1:1-3 Client Login window, password expired

Beneath your displayed Username, enter eight to 20 characters for the new password in both the **Password** and **Confirm Password** fields, including at least one alpha character, one numeric character, and one special character. The password is case sensitive. The password is case sensitive. Click **Change Password** to open an alert box confirming the changed password activity. Click **OK** to close the alert box and to open the application.

If logging in as an administrator—or as a sub-administrator with authorization to view Executive Reports—by default, yesterday’s pre-generated (canned) report displays in the screen, including thumbnail images in the “dashboard” above the report. A list of menu topics and sub-topics display in the navigation toolbar above the screen:

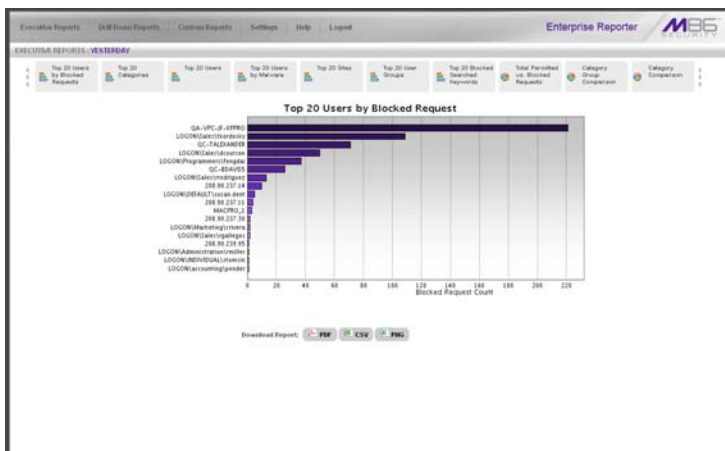



Fig. 1:1-4 Default Executive Report, administrator ID

 **NOTES:** If the ER Server does not contain any data—as on a newly installed unit—the default report page will not show any thumbnail images or bar chart report, and the following text displays: “This report cannot be displayed because there is no data to show for this report.”

On a new unit or a unit with a newly-applied software update, the following message may display on the screen instead of the

*default report: “The report cannot be displayed because there is no data to show for this report at this time. For a new server, it takes about 24 hours before data is available for processing. If a software update was recently applied on an existing server, it may take several hours before data is available.”*

*If using a consolidated ER Server (CER), some screens in the Client differ slightly, and the Consolidated Mode icon displays at the far right on each screen, beneath the M86 logo at the top of the screen (as shown in the image above right).*



*A CER is used in environments with multiple ER Servers, and acts as the source for consolidating records from all remote ER Servers added in the Consolidated Mode Settings screen of the Administrator console. See the ER Administrator User Guide for more information on Consolidated Mode Settings.*

If logging in as a sub-administrator, by default the Custom Wizard Report displays if authorization was not granted for this account to access Executive Reports:

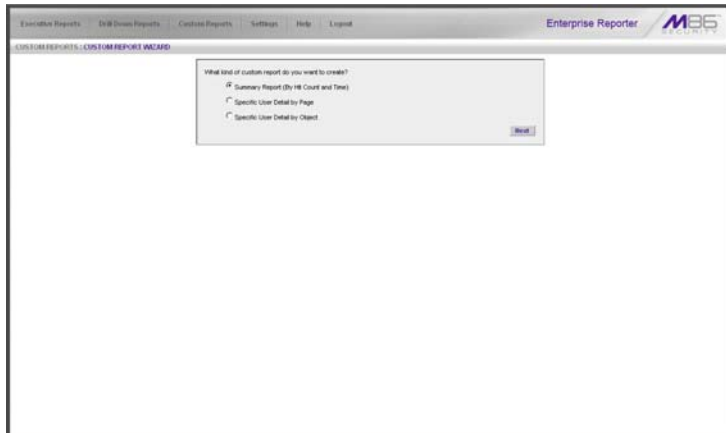


Fig. 1:1-5 Default screen, sub-administrator ID



**TIP:** User permissions are set up by the administrator via the User Permissions option, available from the Settings menu.

## Client Screen Navigation

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### Links in the Navigation Toolbar

The navigation toolbar at the top of the screen consists of the following links and menu topics for configuring and using the Client:

- **Executive Reports** - mouse over this link to open the Executive Reports menu. Administrators and authorized sub-administrators can click any Executive Report menu option to obtain an overview of end user Internet activity. This link does not display for sub-administrators who are not authorized to view Executive Reports.
- **Drill Down Reports** - mouse over this link to open the Drill Down Reports menu. These menu options let you drill down into reporting data to identify specific Internet usage criteria.
- **Custom Reports** - mouse over this link to open the Custom Reports menu. These menu options let you generate, edit, save, and/or run reports customized to your specifications.
- **Settings** - mouse over this link to open the Settings menu. These menu options let you customize the Client application.
- **Help** - mouse over this link to launch a separate browser window or tab displaying the page containing links to the latest user guides (in the .pdf format) for this application.
- **Logout** - mouse over this link to log out of the Client (see Log Out for details on log out procedures).



**NOTE:** *More about buttons, thumbnails, icons, and the navigation toolbar—and the functions of the corresponding windows and screens for these tools—can be found in the Administrator Section and Client User Section of this user guide.*



## Using the Client

---

1. Before you can begin using the Client, the ER Server administrator must customize the ER Server for using the Client.
2. Next, the Client administrator should customize the Client application's settings via the Settings option.
3. Once the ER Server and the Client have been customized, the database can be queried and report views generated for the reporting type of your choice: Executive Report (administrators and authorized sub-administrators only), Drill Down Report, Custom Report.
4. A report view can be exported in a specified file format, printed, emailed, and/or saved.
5. A saved report can be scheduled to run at a given time.

## Log Out

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To log out of the Client application, click the **Logout** button in the navigation toolbar to re-display the login window.

Click the "X" in the upper right corner of the logout window or tab to close the window/tab.

## Re-login

---

Each Client session is timed so that it remains active as long as there is activity in the Client within an eight hour period. You need to log into the Client again after an eight hour period of inactivity, or in the event that the ER Server was restarted.

If your Client session is timed out, when you click a button, thumbnail, or menu item in the Client report screen, the following message displays: “Your session may have timed out, or the Web server has been restarted. Please close your browser window and open a new browser window to log back in to the ER Web Client.”

To log in again, perform one of two actions:

- Close your browser window, and then open a new browser window/tab to log back into the Client.
- In your current browser window/tab, click **Logout** to log out of the Client. This action opens the login window so you can log back into the Client again.

# ADMINISTRATOR SECTION

## Introduction

This section of the user guide provides instructions to administrators on how to set up the Client application for sub-administrators to use. Information on generating Executive Reports is also included.

Before the Client application can be used, the ER Server must be fully configured, and the Structured Query Language (SQL) server must be installed on the network and connected to the Web access logging device(s).

After verifying that the necessary components are installed, configured, and functioning, the Client administrator can begin setting up the Client application for sub-administrators.



**NOTE:** Information about the ER Server can be found in the M86 ER Administrator User Guide or M86 IR Enterprise Reporter Administrator User Guide, accessible in the .pdf format via links at <http://www.m86security.com/support/Enterprise-Reporter/documentation.asp>

# Chapter 1: Installation and Maintenance

## *Environment Requirements*

### **ER Server**

- ER Server must be fully configured, and the Structured Query Language (SQL) server must be installed on the network and connected to the Web access logging device(s)

### **Workstation**

The following components must be installed in order to use the Client:

- Windows XP, Vista, or 7 Operating Systems running Internet Explorer (IE) 7 or 8, or Firefox 3.5 for Client usage
- Macintosh OS X Version 10.5 or 10.6 running Safari 4.0 or Firefox 3.5 for Client usage

The following minimum environment requirements must be fulfilled in order to use the Client:

- Pentium III class processor or greater
- 512 MB RAM minimum, 1 GB RAM recommended
- 2 GB hard drive space for saving files
- screen resolution settings of 1024 x 768 are recommended
- if pop-up blocking software is installed on the workstation, it must be disabled



**NOTE:** Information about disabling pop-up blocking software can be found in Appendix C: Disable Pop-up Blocking Software.

## Client Updates

Updates for the Client are available in ER software releases that are downloaded to the ER Server. Once applied to the ER Server, Client users will be able to obtain all the new features and enhancements currently available.



**NOTES:** *After installing a software update, the following message may display in the screen instead of the default report: “The report cannot be displayed because there is no data to show for this report at this time. For a new server, it takes about 24 hours before data is available for processing. If a software update was recently applied on an existing server, it may take several hours before data is available.”*

*Refer to the Software Update screen sub-section in the M86 ER Administrator User Guide or M86 IR Enterprise Reporter Administrator User Guide for information about installing software updates on the ER Server.*

# Chapter 2: Configuring the Client

## Settings

To begin configuring the Client, mouse over the **Settings** link in the navigation toolbar to open its menu of customization options:

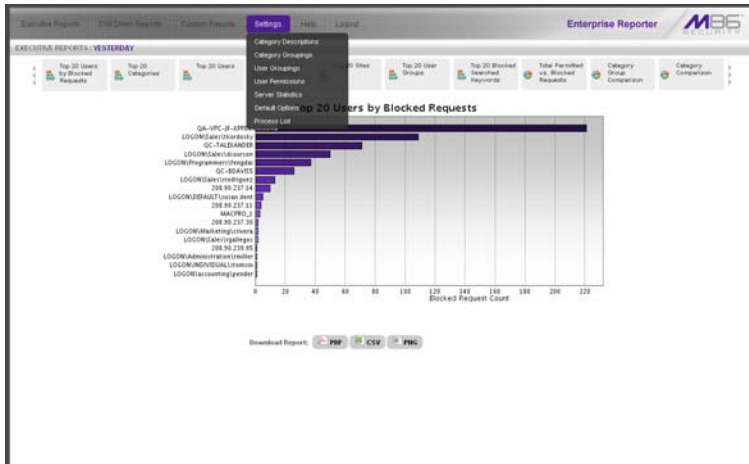


Fig. 2:2-1 Settings menu (administrator), default Executive Report

Click an option in the Settings menu to display the specified window in the panel. The following options are available to administrators: Category Descriptions, Category Groupings, User Groupings, User Permissions, Server Statistics, Default Options, and Process List.



**NOTE:** Information about Server Statistics and Default Options—available to both administrators and sub-administrators—can be found in Chapter 2 of the Client User Section.

## Category Descriptions

The Category Descriptions option is used for viewing category names and descriptions of filtering categories used by the Web access logging device(s).



**NOTE:** When logs are imported each hour, new categories found by the Server are automatically entered and will display when the Client is accessed.

To view details on a filter category, click Category Descriptions in the Settings menu to display the Category Descriptions window in the panel:

Short Name	Descriptive Name
ADVISE	Advice
ALCO	Alcohol
ANIMALS	Animals/Pets
ART	Art
BLURP	Real Population Comments
BANNER	Banner/Ads/Aids
BOLDTEXT	Revealed Text
BOOKS	Books & Literature/Articles
BOUNDS	Boundaries
CHAT	Chat
CHOPORN	Chat Pornography
CLUBS	Clubs
COMMING	Community Organizations
COBB	Criminal Skills
CULTS	Cults
DATE	Dating/Personals
DOMAINS	Domain Listing
DUBS	Duplicate/Inventory
DYNAMIC	Dynamic DNS Services
EDUCATION	Edge Content Services/Intranet
EDUCAT	Education
EDUCGAM	Educational Games
EMPL	Employment
ENTERT	Entertainment
EVENTS	Event Ads
FANSPT	Fantasy Sports
FASHN	Fashion
FINAN	Financial Institution
FIND	Finance
FLV	Flash Video
FRESHET	Free Hosts
FRESHUR	Free/FreeShareware

Fig. 2:2-2 Category Descriptions window

## View Details for a Filter Category

In the Category Descriptions window, filter categories display as rows of records. The following information is included for each record: Short Name of the category and its corresponding Descriptive name.

In the Record field at the bottom of the window, the number of the selected record displays, along with the total number of records (categories).



**TIP:** *The selected record is designated by an arrow in the box to the left of a row. To select another record, click the box in that row to display the arrow. You also can navigate to another record by using the Record navigation field. Click in the box between the arrow buttons and enter a new record number to go to that record. Or click any of the four arrow buttons to advance forward or backward through the list of records. In the order in which they display in the Record field, clicking these buttons moves you to the first record, the record prior to the selected record, the record following the selected record, and the last record.*



## Category Groupings

The Category Groupings option is used for defining a customized group of filter categories, if you wish to run reports using certain filter categories only.

To create, edit, or delete a category group, click Category Groupings in the Settings menu to display the Category Groupings window in the panel:



Fig. 2:2-3 Category Groupings window

The Category Groupings window is comprised of two frames used for setting up and maintaining category groupings: Group Information, and Group Definitions.



**NOTE:** If using a Client for a consolidated ER Server (CER), the Rollup Category Groups frame displays to the far right of this window: See the Consolidated Mode: Rollup Category Groups frame sub-section for information on the rollup function.

## Group Information frame

The Group Information frame displays to the left in the Category Groupings window. In this frame you can add, rename, or delete a category group.

Any category groups that were created display in alphanumerical order in the list box in this frame.

### **Add a Category Group**

1. In the field to the left of the Add button, type in the name for the category group.
2. Click the **Add** button to add this entry to the list box above.



**NOTE:** *The category group you added also displays in the Group Name pull-down menu in the Group Definitions frame to the right.*

### **Rename a Category Group**

1. Select the category group from the list box by clicking on your choice to highlight it.
2. Click the **Rename** button to open the Group Rename dialog box:

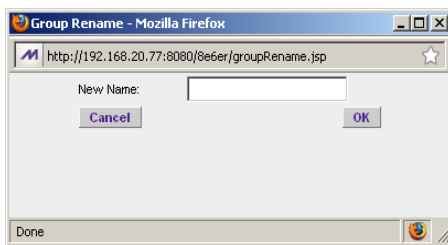




Fig. 2:2-4 Edit a Category Group Name

3. In the **New Name** field, enter the new category group name.


 **TIP:** Click **Cancel** if you wish to return to the *Category Groupings* window without saving your modifications.

4. Click **OK** to close the Group Rename dialog box and to update the list box in the Group Information frame with your edits.

 **NOTE:** The category group you renamed also displays in the *Group Name* pull-down menu in the *Group Definitions* frame to the right.

### **Delete a Category Group**

1. Select the category group from the list box by clicking on your choice to highlight it.
2. Click the **Delete** button to remove the category group from the list box.

 **NOTE:** The category group you deleted also is removed from the *Group Name* pull-down menu in the *Group Definitions* frame to the right.

## Group Definitions frame

The Group Definitions frame displays to the right in the Category Groupings window. In this frame you define a category group by specifying which categories will belong to that group.

### *Add Categories to a Category Group*

1. Select a category group from the **Group Name** pull-down menu. Any categories previously entered display in the list box in this frame.
2. Click the **Add To Group** button to open the Add To Group pop-up box:

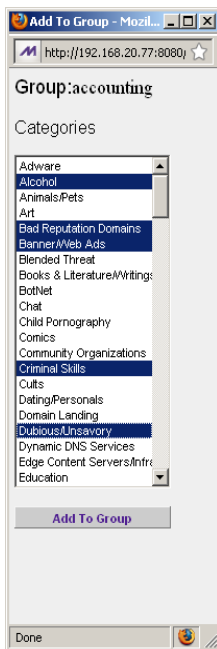


Fig. 2:2-5 Add To Group

3. Select a category from the pop-up box by clicking on your choice to highlight it.



**TIP:** To select multiple categories, press the *Ctrl* key on your keyboard and then click on categories to highlight them.

4. Click the **Add To Group** button in the pop-up box to specify the selected categories to be added to the Group Definitions frame list box.
5. Click the "X" in the upper right corner of the Add To Group pop-up box to close it, and to add all selected categories to the list box in the Group Definitions frame.

### ***Delete a Category from a Category Group***

1. Select a category group from the **Group Name** pull-down menu to display all categories for that category group in the list box.
2. Select the category to be removed by clicking on your choice to highlight it.
3. Click the **Delete Item(s)** button to remove the category from the list box for that category group.

## Consolidated Mode: Rollup Category Groups frame

For a consolidated ER (CER), the Client displays the Rollup Category Groups frame to the far right, with a greyed-out list of the ER Server(s) that had previously been added in the Administrator console. This feature is used for synchronizing the contents of selected ER Servers with the CER Server on demand.

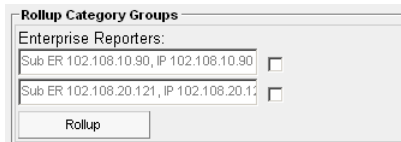


Fig. 2:2-6 Rollup Category Groups frame



**NOTES:** Though automatic rollups are performed by the CER Server every four hours, today's data will not be included.

*Each category group must be manually rolled up in order for that group to be included on the CER.*

*If a category group name on an ER already exists on the CER, the ER's member categories will replace the category group definitions on the CER.*

*If a category group by the same name exists on two ERs, their combined definitions will replace the definitions of an identically-named group on the CER.*

### **Roll up category groups on demand**

To roll up category groups on demand to the CER:

1. Click the checkbox(es) corresponding to the ER Server(s) to be synchronized with the CER.
2. Click **Rollup** to perform the rollup.

## User Groupings

The User Groupings option is used for defining a customized group of users, if you wish to run reports for certain users only.

To create, edit, or delete a user group, click User Groupings in the Settings menu to display the User Groupings window in the panel:

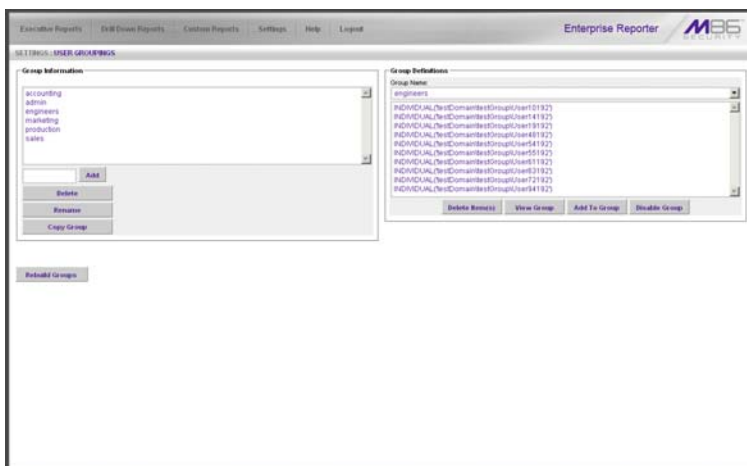


Fig. 2:2-7 User Groupings window

The User Groupings window is comprised of two frames used for setting up and maintaining user groupings: Group Definitions and Group Information.



**NOTE:** If using a Client for a consolidated ER Server (CER), the Rollup User Groups frame displays beneath the Group Definitions frame in this window: See the Consolidated Mode: Rollup User Groups frame sub-section for information on the rollup function.

After making all additions, modifications, or deletions in this window, click **Rebuild Groups**.



**NOTES:** *When clicking Rebuild Groups, the window becomes blank and displays the following message: “Please wait while the groups are being rebuilt...”. When the user groups have been rebuilt, the window refreshes itself and becomes available again.*

*Reports for a newly-created user group will only be available after the user group is created, even though reporting data may be available for each individual user prior to the time the user group was created.*

## Group Definitions frame

The Group Definitions frame displays to the left in the User Group Setup window. In this frame you can view members of a user group, define any non-imported user group by specifying which users will belong to that group, and indicate whether or not to disable a user group.

### ***View a List of Users in a User Group***

1. Select a user group from the **Group Name** pull-down menu. Users set up for that group display in the list box in this frame.
2. To view the entire list of users in the format used on the server, click the the **View Group** button to open the Users in the ‘user group’ pop-up box:





Fig. 2:2-8 Users in user group pop-up box

Each user included in the user group displays as a separate row in this pop-up box.



**NOTE:** If you have just copied or created a new user group, the pop-up box does not yet show any users and the following message displays: "Sorry there are no Users in the 'X' group at this moment." (in which 'X' represents the group name). Any modifications just made to a user group will not immediately display, since the list of users is updated automatically each hour based on the group definitions and latest usage data. In order to have group definition changes effective immediately, click *Rebuild Groups*.

3. Click the "X" in the upper right corner of the pop-up box to close it.

## Define a User Group

When defining a user group, you can add and/or exclude users to/from that group—unless the group was imported to the ER Server from a Web Filter’s LDAP server, since imported user group data cannot be edited. Modifications to a non-imported user group can be made at any time, as necessary.

1. Select a non-imported user group from the **Group Name** pull-down menu. Users set up for that group display in the list box in this frame.
2. Click the **Add To Group** button to open the pop-up box where you define users to be added/excluded to/from the group:

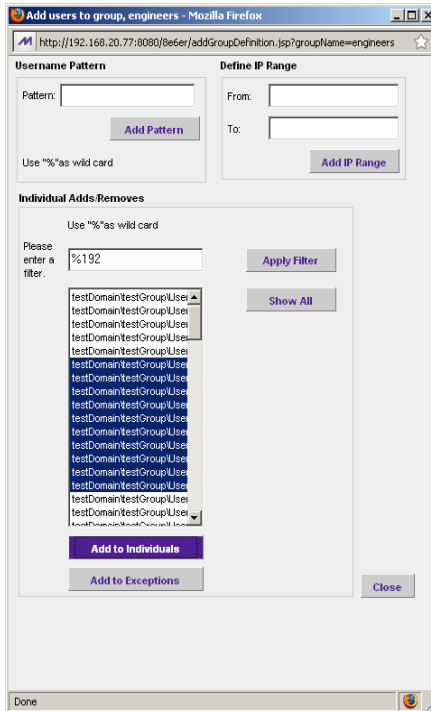


Fig. 2:2-9 Add Users to group



**TIPS:** To view a list of all users, go to the *Individual Adds/Removes* frame and click the *Show All* button to display the list of users in the list box.

To clear your entries in this pop-up box without accepting them, **do not** click any of the buttons in the frames described below. Instead, click the *Close* button in the pop-up box, and return to step 1.

### 3. Make entries in one of the three frames:

- **Username Pattern** - This frame is used for including users from a specific group (such as “sales”) on the network. In the **Pattern** field, enter the appropriate characters and wild card “%” to add specified users to the group. For example, type in **sales%** to add anyone to the group who has a “sales” designation on your network. Click the **Add Pattern** button to add the pattern.
- **Define IP Range** - This frame is used for including users based on a range of IP addresses. For example, you might have one range of IP addresses for sales, and another for admin. Enter the IP address range in the **From** and **To** fields. Click the **Add IP Range** button to add the IP address range.
- **Individual Adds/Removes** - This frame is used for including and/or excluding specified users. Click the **Show All** button to display a list of all users in the list box. To narrow down the list of users, make an entry in the **Please enter a filter** field using the “%” wild card, and click the **Apply Filter** button to only display the users you specified. To select from users in the list box, click on the user(s) to highlight your choice(s). After making all choices, click **Add to Individuals** to include the selected users to the group, or click **Add to Exceptions** to exclude the users from the group.



**TIP:** In the Individual Adds/Removes frame, if you know which users you would like to add/exclude to/from the group, you can bypass the step for showing all users and making your selections. To use this shortcut, enter the criteria in the Please enter a filter field along with the “%” wild card, and then click the Apply Filter button to display your results in the list box.

4. After you have made your entries, click **Close** to close the pop-up box.

The following information displays in the Group Definitions frame list box when a selection for the group is made from the Group Name pull-down menu:

- If an entry was made in the Username Pattern frame, “PATTERN” and the character(s) you entered display(s).
- If entries were made in the IP Range frame, “IP RANGE(‘X.X.X.X’ AND ‘X.X.X.X’)” displays, in which ‘X.X.X.X’ represents the IP address that was entered in the From or To field.
- If entries were made in the Individual Adds/Removes frame, “INDIVIDUAL(...)” and/or “EXCEPTION(...)” displays, in which ‘(...)’ represents specific details about the entry.



**NOTE:** A combination of any of items above may display in the Group Definitions frame list box, based on entries you made in any of the frames in the pop-up box.

### ***Disable a User Group***

1. Select a user group from the **Group Name** pull-down menu. Users set up for that group display in the list box in this frame.
2. Click the **Disable Group** button to exclude the user group from reports.



**TIPS:** This function for specifying which user groups will not be included in reports is useful in conjunction with the Copy Group function—disabling an imported user group but enabling its copied counterpart.

Any user group that is currently disabled can be enabled by selecting the Group Name and clicking Enable Group.

### **Delete User(s) from User Group**

1. Select a user group from the **Group Name** pull-down menu. Users set up for that group display in the list box in this frame.
2. Click on the user to highlight your selection.



**TIP:** To select multiple users, press the Ctrl key on your keyboard and then click on the users to highlight them. To select a block of users, click the first user, press the Shift key on your keyboard, and then click the last user.

3. Click the **Delete Item(s)** button to remove the user(s) from the user group.

## Group Information frame

The Group Information frame displays to the right in the User Group Setup window. In this frame you can add, rename, copy, or delete a user group.

Any user groups that were created display in the list box in this frame, along with any LDAP user groups imported from the Web Filter to the ER Server.

### Add a User Group

1. In the field to the left of the Add button, type in the name for the user group.
2. Click the **Add** button to add this entry to the list box above.



**NOTE:** The user group you added also displays in the Group Name pull-down menu in the Group Definitions frame to the left.

### Rename a User Group

1. Select the user group from the list box by clicking on your choice to highlight it.
2. Click the **Rename** button to open the Group Rename dialog box:

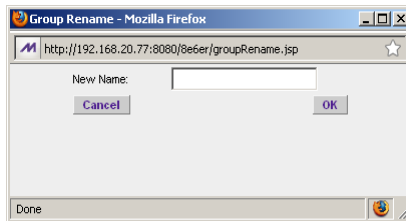


Fig. 2:2-10 Group Rename dialog box

3. In the **New Name** field, enter the new user group name.



**TIP:** Click **Cancel** if you wish to return to the User Groupings window without saving your modifications.

4. Click **OK** to close the Group Rename dialog box and to update the list box in the Group Information frame with your edits.



**NOTE:** *The user group you renamed also displays in the Group Name pull-down menu in the Group Definitions frame to the left.*

### **Copy a User Group**

The Copy Group feature is useful when importing an LDAP user group from a Web Filter server, since imported LDAP user groups cannot be modified, but any copied user group can be modified.

1. Select the user group from the list box by clicking on your choice to highlight it.
2. Click the **Copy Group** button to add the copied user group name to the list box, with “-Copied” appended to the name.



**NOTE:** *The user group you copied also displays in the Group Name pull-down menu in the Group Definitions frame to the right.*

### **Delete a User Group**

1. Select the user group from the list box by clicking on your choice to highlight it.
2. Click the **Delete** button to remove the user group from the list box.



**NOTE:** *The user group you deleted also is removed from the Group Name pull-down menu in the Group Definitions frame to the right.*

## Consolidated Mode: Rollup User Groups frame

For a consolidated ER (CER), the Client displays the Rollup User Groups frame beneath the Group Definitions frame, with a greyed-out list of the ER Server(s) that had previously been added in the Administrator console. This feature is used for synchronizing the contents of selected ER Servers with the CER on demand.

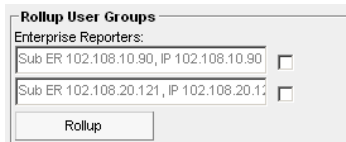


Fig. 2:2-11 Rollup User Groups frame



**NOTES:** *Though automatic rollups are performed by the CER every four hours, today's data will not be included.*

*Each user group must be manually rolled up in order for that group to be included on the CER.*

*If a user group name on an ER already exists on the CER, the ER's patterns, individuals, IP ranges, and exceptions will replace the user group definitions on the CER.*

*If a user group by the same name exists on two ERs, their combined definitions will replace the definitions of an identically-named group on the CER.*

### **Roll up user groups on demand**

To roll up user groups on demand to the CER:

1. Click the checkbox(es) corresponding to the ER Server(s) to be synchronized with the CER.
2. Click **Rollup** to perform the rollup.



## User and Group Permissions

The User and Group Permissions option is used for creating and maintaining user accounts so that administrators and authorized sub-administrators can view reports for their group(s) and change their own passwords. This option requires user groups to be set up via the User Groupings option from the Settings menu.

To assign permissions, or to edit permissions that have been assigned, click User Permissions in the Settings menu to display the User and Group Permissions window in the panel:



Fig. 2:2-12 User and Group Permissions window

Using the User and Group Permissions window, you can maintain the list of sub-administrators and user groups.

## Add User

When adding a user who will be authorized to use the Client, you must first: Set up the user's username and password, specify if the user will have rights as an administrator or sub-administrator, and then indicate if the user will be able to access Executive Reports. Next, you must specify the user group(s) to which the user will belong.

1. Click the **Add User** button to open the Enter Username and Password dialog box:

Fig. 2:2-13 Add User

2. In the **Username** field, enter up to 20 characters without spaces—this may include upper- and/or lowercase alphanumeric characters, and special characters.
3. In the **Password** field, enter eight to 20 characters—including at least one alpha character, one numeric character, and one special character. The password is case sensitive.
4. Type in the same characters in the **Confirm Password** field.
5. Indicate the **User Type** by selecting the level of user permissions (“Admin” or “Sub-Admin”). An administrator

will have access to all features in the Web Client, and will have access to all user groups. A sub-administrator will only be able to manage his/her account and user groups assigned to him/her.

6. An administrator has access to all Executive Reports. For a sub-administrator, specify if this user will be **Allowed to View Executive Report** by clicking the corresponding checkbox.



**TIP:** Click **Cancel** if you wish to return to the Sub-Admin and Group Information window without saving your entries.

7. Click **Save** to add the user to the list of available users.



**NOTE:** The list of administrators and sub-administrators can be viewed in the User Information dialog box, accessible by clicking **Edit All Users**. If a sub-administrator was added, the username additionally is included in the Sub-Admin pull-down menu in the Sub-Admin Information frame and also displays in the Add Sub-Admin pull-down menu in the Group Information frame.

If a sub-administrator was just added to the list, you must now add at least one user group to the sub-administrator's account by making entries in either the Sub-Admin Information frame or the Group Information frame. While both frames contain similar contents, each serves a different function. The Sub-Admin Information frame is used for maintaining a list of authorized sub-administrators, while the Group Information frame is used for maintaining user groups.

## Sub-Admin Information frame

In the Sub-Admin Information frame, you can add a user group to the sub-administrator's account, or remove a user group from the sub-administrator's account.



**NOTE:** *User groups will not show up in the sub-administrator's generated reports until the following day.*

### **Add User Group to a Sub-Admin**

1. Select the **Sub-Admin** from the pull-down menu. If any user groups have been added to the sub-administrator's account, these groups display in the list box below.
2. From the **Add To Group** pull-down menu, select the group to be added to the sub-administrator's account.
3. Click **Go** to add the user group to the sub-administrator's account, and to display the group name in the list box above.

### **Remove User Group from a Sub-Admin**

1. Select the **Sub-Admin** from the pull-down menu. The sub-administrator's group(s) display(s) in the list box below.
2. Select the group to be removed from the sub-administrator by clicking on your choice to highlight it.
3. Click the **Delete Group From Sub-Admin** button to remove the group from sub-administrator's account and from the list box.

## Group Information frame

In the Group Information frame, you update user groups by adding or removing sub-administrators.

### *Update User Group by Adding a Sub-Admin*

1. Select the **Group** from the pull-down menu. Any sub-administrator added to this user group displays in the list box below.
2. From the **Add Sub-Admin** pull-down menu, select the sub-administrator to be added to the group.
3. Click **Go** to display the sub-administrator's username in the list box above.

### *Update User Group by Removing a Sub-Admin*


1. Select the **Group** from the pull-down menu. Any sub-administrators added to this user group display in the list box below.
2. Select the sub-administrator to be removed from the group by clicking on your choice to highlight it.
3. Click the **Remove Sub-Admin From Group** button to remove the sub-administrator from the list box.

## Edit Password, Change Permissions, Delete User

Click the **Edit All Users** button in the Sub-Admin and Group Information window to open the User Information dialog box:

Fig. 2:2-14 Edit user password, change permissions, delete user

In this dialog box you can modify an administrator or sub-administrator's password, change a sub-administrator's permissions for accessing Executive Reports, or delete an administrator or sub-administrator from the user list.

 **TIP:** Click *Cancel* if you wish to close the dialog box and return to the Sub-Admin and Group Information window without saving any edits.

### Change a User's Password

1. In the User Information dialog box, select the username of the administrator or sub-administrator from the **Username** pull-down menu.
2. In the **Password** field, type in the new password using eight to 20 characters—including at least one alpha character, one numeric character, and one special character. The password is case sensitive.

- Press the Tab key on your keyboard to move to the **Confirm Password** field, and type in the same characters you entered in the Password field.

## Database Process List

The Database Process List option is used for viewing or halting a process that is currently running.

To access information about current processes, click Process List in the Settings menu to display the Process List window in the panel:

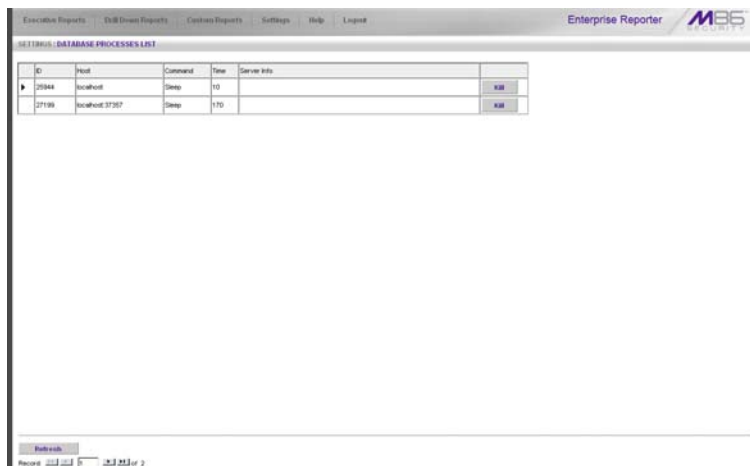


Fig. 2:2-15 Process List window

## View Details on a Process

Each row in the list includes the following information: process identification number (ID) on the MySQL server; Host name or IP address of the server, and port connected to the database; the state of the last Command issued by the user (“Killed”, “Query”, “Sleep”); the amount of Time in seconds the process has remained in its current state, and SQL statement for a process currently running (Server Info).

in the Record field at the bottom of the window, the number of the selected record displays, along with the total number of records.

Click the **Refresh** button to refresh the list of records.



**TIP:** The selected record is designated by an arrow in the box to the left of a row. To select another record, click the box in that row to display the arrow. You also can navigate to another record by using the Record navigation field. Click in the box between the arrow buttons and enter a new record number to go to that record. Or click any of the four arrow buttons to advance forward or backward through the list of records. In the order in which they display in the Record field, clicking these buttons moves you to the first record, the record prior to the selected record, the record following the selected record, and the last record.

## Terminate a Process

1. Select the process to be terminated and click **Kill**. This action opens a dialog box with the message: “Are you sure you want to kill this process?”



**WARNING:** Be sure that you do not kill the wrong process.



**TIP:** Click **Cancel** to resume the process and to close the dialog box.

2. Click **OK** to terminate the process. After the process is killed, an alert box opens displaying the message: “Process Killed!”
3. Click **OK** to close the alert box.



# CLIENT USER SECTION

## Introduction

This section of the user guide provides instructions to sub-administrators on how to utilize the Client application to generate report views and interpret results.

# Chapter 1: Installation Requirements

The following components must be installed in order to use the Client:

- Windows XP, Vista, or 7 Operating Systems running Internet Explorer (IE) 7 or 8, or Firefox 3.5 for Client usage
- Macintosh OS X Version 10.5 or 10.6 running Safari 4.0 or Firefox 3.5 for Client usage

The following minimum environment requirements must be fulfilled in order to use the Client:

- Pentium III class processor or greater
- 512 MB RAM minimum, 1 GB RAM recommended
- 2 GB hard drive space for saving files
- screen resolution settings of 1024 x 768 are recommended
- if pop-up blocking software is installed on the workstation, it must be disabled



**NOTE:** Information about disabling pop-up blocking software can be found in this Client User Guide in Appendix C: Disable Pop-up Blocking Software.

## Chapter 2: Customizing the Client

This chapter provides information on customizing the Client to generate reports based on your specified settings.

### Settings

To begin customizing the Client, log in to the Client, then mouse over the **Settings** link in the navigation toolbar to open a menu of customization options:

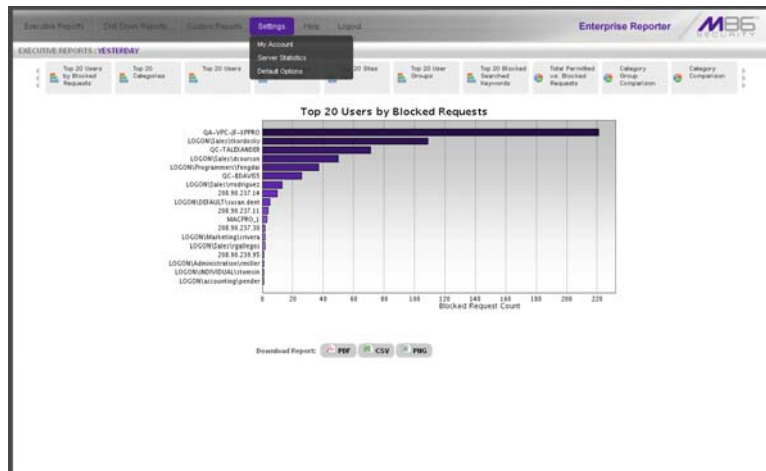


Fig. 3:2-1 Settings menu (sub-administrator), default Executive Report

Click an option in the Settings menu to display the specified window in the panel. The following options are available to sub-administrators: My Account, Server Statistics, and Default Options.

## My Account

The My Account option displays only for sub-administrators who have been set up by the administrator to use the Client. My Account is used for viewing a list of users who are included in your user group(s), and for updating your password.

To access your account, click My Account in the Settings menu to display the My Account window in the panel:

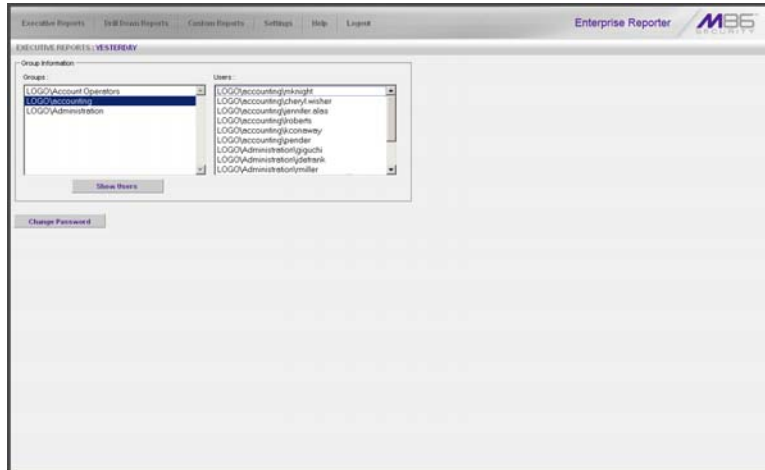


Fig. 3:2-2 My Account window


Upon accessing My Account, any user group to which your username has been assigned (via the User Permissions option from the Settings menu) displays in the Groups list box.

### View Users in a User Group

To view a list of users in your user group:

1. In the Groups list box, select the user group by clicking on your choice to highlight it.

2. Click the **Show Users** button to display the users in the Users list box to the right (see Fig. 3:2-2).

 **TIP:** If there is another user group listed that you wish to view, follow the steps above to view the usernames in that user group.


## Change Password

1. Click the **Change Password** button to open the Change User Password dialog box:



Fig. 3:2-3 Change User Password

2. Type in the **Old Password**.
3. Type in the **New Password**, entering eight to 20 characters—including at least one alpha character, one numeric character, and one special character. The password is case sensitive.
4. Type in the same characters for the new password in the **Confirm New** field.

 **TIP:** Click **Cancel** if you wish to return to the My Account box without saving your entries.

5. Click **OK** to save your settings.

## ER Server Information

The ER Server Information window contains details about data storage on the ER Server, the time the Web Client Server was last restarted, and the ER Server’s IP address and current software version number.

Click Server Statistics in the Settings menu to display the ER Server Information window in the panel:

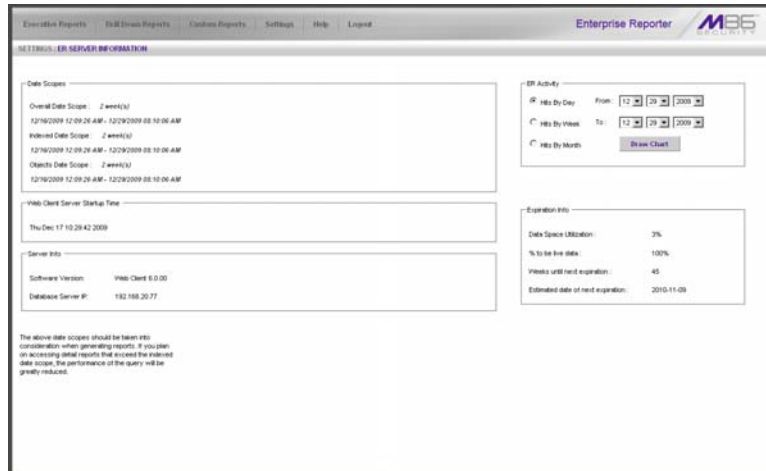


Fig. 3:2-4 ER Server Information window

This window is comprised of five frames: Date Scopes, ER Activity, Web Client Server Startup Time, Server Info, and Expiration Info.



**NOTES:** *The following message displays on a newly-installed ER: “Server statistics are not available at this time. If the ER server was newly installed, server statistics will be available after the first time statistics are correlated for the server. Server statistics are correlated immediately after midnight, Monday through Saturday. If this problem persists, please contact your system administrator.”*

*If using a Client for a consolidated ER Server (CER), frames are named as follows: Date Scopes Consolidated ER, ER Activity Consolidated ER, Web Client Server Startup Time Consolidated ER, Server Info Consolidated ER, and Expiration Info Consolidated ER.*

*The additional Date Scopes Remote ERs frame displays Overall Date Scope and Indexed Date Scope information for each remote ER set up for access on the CER. See Consolidated Mode: Date Scopes Remote ERs for more information.*

## Date Scopes

In the Date Scopes frame, the number of week(s) of data stored on the ER Server, and the date and time range display for the following date scopes:

- **Overall Date Scope** - this date scope pertains to all data currently stored on the Server, including both live (indexed) and archive (non-indexed) data.
- **Indexed Date Scope** - this date scope pertains only to live data currently stored on the Server. Live data can include Web pages and objects, and will always include the indexes for these items. Objects include images from Web pages, and items such as JavaScript files and flash files.
- **Objects Date Scope** - this date scope pertains only to objects currently stored on the Server. If this date scope overlaps the date ranges for indexed and non-indexed data currently stored on the Server, both live and archive items will be included in this date scope.



**NOTE:** *If using a Client for a consolidated ER Server (CER), there is no data for the Indexed Date Scope and Objects Date Scope since this data is not pertinent to a CER.*

## Consolidated Mode: Date Scopes Remote ERs

The Date Scopes Remote ERs frame displays for a consolidated ER (CER).

For each remote ER unit, the following columns of information are included: ER (name and IP address); and the number of weeks stored and date scopes for the following: Overall Date Scope, Indexed Date Scope, Objects Date Scope, and Summarized Date Scope.



**NOTE:** *Since the CER only stores summary data on the appliance itself while detail data is stored on the remote ERs, the summary data for a remote ER might display in the CER Web Client even though detail data for that remote ER may have expired. In the CER Web Client, this scenario might generate a report with the message: "No Records Found."*

## Web Client Server Startup Time

The Web Client Server Startup Time frame contains the following information pertaining to the last time the Web Client Server was restarted: Day of the week and month name abbreviation, day, military time (HH:MM:SS), and year (YYYY).



**NOTE:** *This information is useful for troubleshooting manually generated reports. If your reports are not displaying, it may be that the Web Client Server has restarted and terminated the report generation process.*

## Server Info

The Server Info frame contains the following ER Server information: **Software Version** number and **Database Server IP** address.



## ER Activity

In the ER Activity frame, specify the type of chart you wish to generate that provides details on the number of hits within a designated time period. A “hit” is any page and/or object an end user accesses as the result of entering a URL in his/her browser window.

By default, the **Hits By Day** radio button is selected, and in the From and To fields, today’s date displays in the MM, DD, and YYYY format.

1. Specify the time period for the chart you wish to draw by doing the following:
  - Click the radio button corresponding to **Hits By Day**, **Hits By Week**, or **Hits By Month**.
  - At the **From** and **To** fields, make a selection from any of the pull-down menus for month (1-12), day (1-31), or year (2000-2011).
2. Click the **Draw Chart** button to open a window that displays the chart of your selection in the PDF file format.

The header section includes the title of the chart and date range. The footer section includes the date and time the chart was generated (shown in the MM/DD/YYYY HH:MM AM/PM format), the login ID of the person who generated the chart (Generated by) and the Page number and page range.

The chart image includes a graph illustrating the general Number of Hits (in purple) and Number of IPs that generated those hits (in blue) for each unit of Time in the specified period.

Rows of report details indicate the time measurement (Day, Week, or Month), the exact Number of Hits corresponding to each unit of time, and the Total Records.

Depending on the time frame specified, this chart may be several pages in length.

- **Hits Per Day** - If you selected Hits By Day, days within the date range are plotted on the graph, grouped into equal time intervals. The summary shows the Number of Hits and Number of IPs for a specified Day (MM/DD/YYYY).

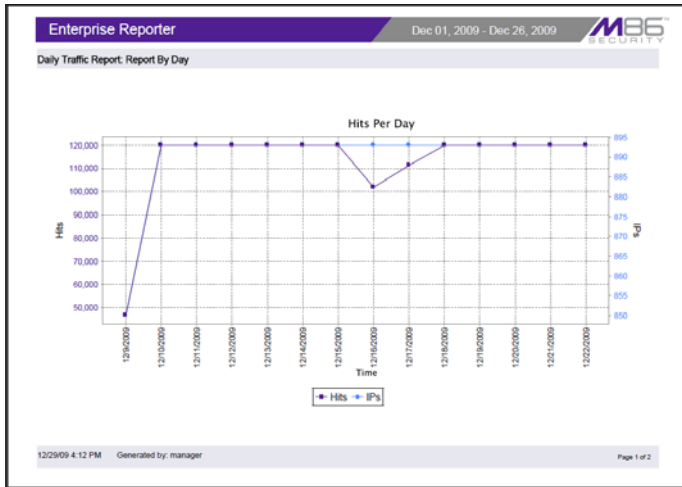


Fig. 3:2-5 Hits Per Day chart

- **Hits Per Week** - If you selected Hits By Week, each week within the date range is plotted on the graph. The summary shows the general Number of Hits (in purple) and Number of IPs that generated those hits (in blue) for a specified Week (YYYY-WW). Weeks are numbered 1-52.

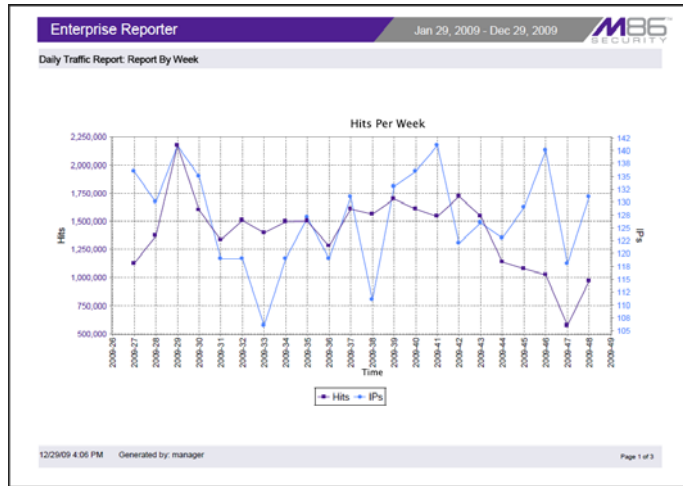


Fig. 3:2-6 Hits Per Week chart

- **Hits Per Month** - If you selected Hits By Month, each month within the date range is plotted on the graph. The summary shows the general Number of Hits (in red) and Number of IPs that generated those hits (in green) for a specified Month (Month 'YY). Month names are abbreviated.

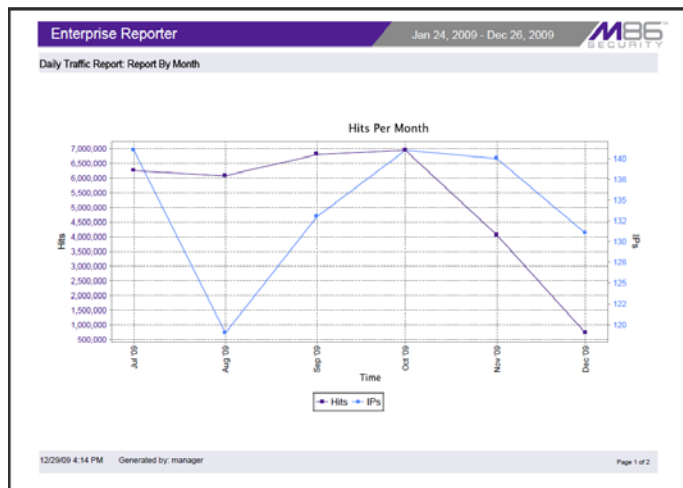




Fig. 3:2-7 Hits Per Month chart

3. You now have the option to do any of the following:
  - print the chart - click the print  icon to open the Print dialog box, and proceed with standard print procedures.
  - save the chart - click the save  icon to open the Save a Copy dialog box, and proceed with standard save procedures.
  - close the chart window - click the “X” in the upper right corner to close the chart window.
  - generate a new chart - make new entries in the ER Server Information window.

## Expiration Info

In the Expiration Info frame, the following data displays:

- **Data Space Utilization** - the percentage of database storage space currently being used on the ER Server
- **% to be live data** - the percentage of data that is set to be live data stored on the Server
- **Weeks until next expiration** - the number of weeks from this week that data on the Server will expire
- **Estimated date of next expiration** - the date scheduled for the next automatic database expiration

## Default Options

Default Options is used for specifying various settings to be used in reports.

Click Default Options in the Settings menu to display the Default Options window in the panel:



Fig. 3:2-8 Default Options window

## Set New Defaults

1. Enter the maximum number of records that can be returned by a detail report query before triggering the **Page/Object Warning Limit** message. This warning message indicates that the number of records exceeds the number specified in this field. The default is “1000” records.
2. Enter the **Default Top Value** of records that will be generated for summary reports. The default is “50” records.

3. Enter the maximum number of records that will be included in a report's **Result Set Limit**. If the number of records from a query exceeds the limit established in this field, the overflow will be included in the next set of records. The default is "1000" records per set.
4. By default, the **Hide Un-Identified IPs** checkbox is deselected. This indicates that activity on machines not assigned to specific users will be included in reports.  
  
If you wish to exclude activity from machines not assigned to specific users, click in the checkbox to enter a check mark.
5. By default, the **Hide Uncategorized Category** checkbox is selected. This indicates that uncategorized sites will not be displayed or counted in drill down reports.  
  
If you wish to include uncategorized sites in drill down reports, click in the checkbox to remove the check mark.



**TIP:** Click *Cancel* to exit without saving your entries.

6. Click the **Save** button to save your settings and to exit the Default Options window.

## Chapter 3: Executive Reports

This chapter provides information about “canned” reports that display on the screen as bar charts or pie charts. By clicking a button beneath the chart image (PDF, CSV, PNG) report information can be viewed in the specified file format (.pdf, .csv, .png). Executive Reports contain pre-generated data for a specified period of time (Yesterday, Last Week, Last Month, Week to Yesterday, or Month to Yesterday) for any of the following report topics or entities showing Internet activity:

- **Top 20 Users by Blocked Request** - bar chart report based on each end user’s total number of Blocked and Warn Blocked requests. This report is only available if the Block Request Count feature is enabled in the Optional Features screen on the ER Server.
- **Top 20 Categories by Page Count** - bar chart report based on the total page count for each filtering category set up in the Category Description list from the Settings menu.
- **Top 20 Users by Page Count** - bar chart report based on each end user’s total page count.
- **Top 20 Users by Malware Hit Count** - bar chart report based on each end user’s total hit count from the following categories in the Security, Internet Productivity, and Internet Communication (Instant Messaging) category groups: BotNet, Malicious Code/Virus, Bad Reputation Domains, Spyware, Adware, and IRC.
- **Top 20 Sites by Page Count** - bar chart report based on the total page count for the most popular sites accessed by end users.
- **Top 20 User Groups by Page Count** - bar chart report based on the total page count for each user group set up in the User Groupings list from the Settings menu.

- **Top 20 Blocked Searched Keywords** - bar chart report based on the total number of blocked keyword requests. This report is only available if the Block Searched Keywords Report feature is enabled in the Optional Features screen on the ER Server.
- **Total Permitted vs. Blocked Requests** - pie chart report based on the total page count for all filtering categories set up to pass and all filtering categories set up to be blocked.
- **Category Group Comparison** - pie chart report based on the total page count for each filtering category group set up in the Category Groupings window from the Settings menu.
- **Category Comparison** - pie chart report based on the total page count for each filtering category set up in the Category Description list from the Settings menu.
- **User Group Comparison** - pie chart report based on the total page count for each user group set up in the User Groupings list from the Settings menu.

Once you have obtained an overview of Internet activity using Executive Reports, you can generate customized or drill down report views, save these views, export them, and/or schedule these reports to run at a designated time.



## Generate an Executive Report

By default, upon successfully logging into the Web Client user interface, yesterday's report view showing either the Top 20 Users by Blocked Request or Top 20 (Internet Filtering) Categories by Page Count displays in the panel:

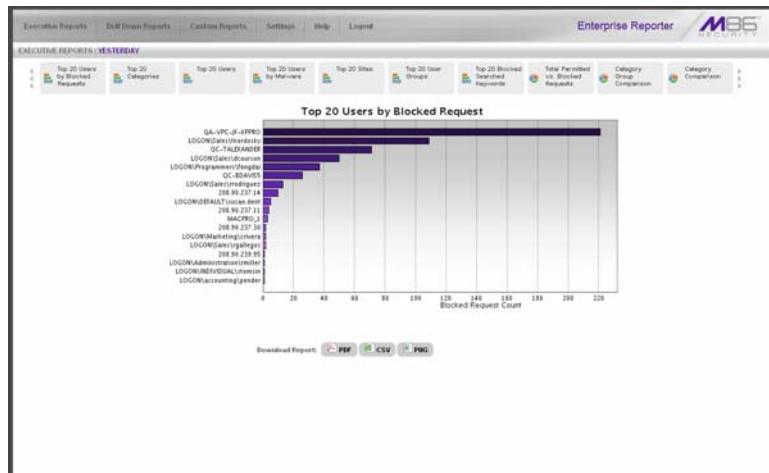



Fig. 3:3-1 Yesterday's Top 20 Users by Blocked Request Report

 **TIP:** Click the left arrow or right arrow at the edges of the dashboard to display thumbnail images that are currently hidden.

 **NOTE:** If the ER Server does not contain any data—as on a newly installed unit—the default report page will not show any thumbnail images or bar chart report in the panel, and the following text displays: “This report cannot be displayed because there is no data to show for this report.”

To generate an Executive Report:

1. From the navigation toolbar, click an Executive Reports menu topic for the time period to be included in the report: Yesterday, Last Week, Last Month, Week to Yesterday, or Month to Yesterday.
2. Click a thumbnail in the dashboard for the selected report option to display as the report view.



**NOTE:** If necessary, click another time period or thumbnail to display that specified report view in the panel.

3. To see details for the generated Executive Report view, click the button beneath the chart image to open a report view in the specified file format: PDF (portable document format), CSV (comma separated value), PNG (portable network graphics).

## Executive Report in the PDF format

Clicking the **PDF** button opens a separate browser window containing the Executive Report in the .pdf format:

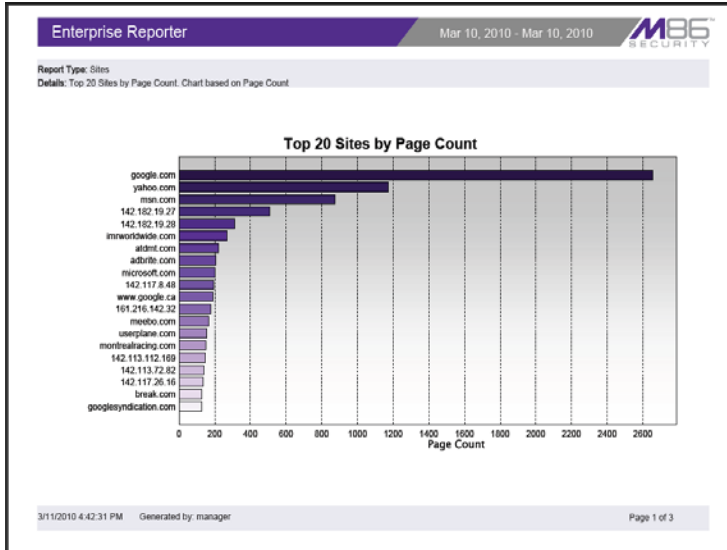


Fig. 3:3-2 Sample Bar Chart Executive Report in the PDF format

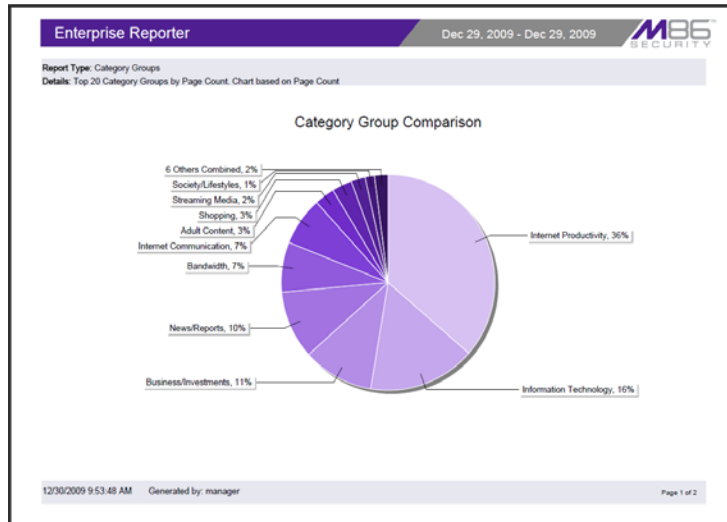


Fig. 3:3-3 Sample Pie Chart Executive Report in the PDF format

The header of the generated report includes the date range, Report Type, and criteria Details.

The body of the first page of the report includes the following information:

- Bar chart - name of category, username, username path, URL or site IP address, user group name, or blocked user request, and corresponding bar graph. Beneath the bar graph are count indicators and a label describing the type of Count used in the report.
- Pie chart - color-coded pie graph showing a maximum of 15 categories or user groups. Any categories or user groups with page counts totalling less than one percent are grouped together under the “Others Combined” label.

The footer of the report includes the username of the person who generated the report (Generated by), the Date and Time the report was generated, and Page number and page range.

The body of the pages following the first page of the bar or pie chart report includes the following information:

- Top 20 Users by Blocked Request report - user NAME and corresponding BLOCKED REQUEST COUNT—which includes Blocked and Warn Blocked requests. Total Records and Total Number of Blocked Requests for this Date Scope display at the end of the report.
- Top 20 Blocked Searched Keywords report - Blocked Keywords and corresponding Blocked Count. A Grand Total of Blocked Count displays at the end of the report.
- All other reports - Count columns and corresponding totals for all reports. Grand Total and Count display at the end of the report.

## Executive Report in the CSV format

Clicking the **CSV** button opens a separate browser window containing the Executive Report in the .csv format:

1	Site	Category Count	IP Count	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
2	Sort Order: Page Count, descending.									
3	From: 3/10/2010 12:00:00 AM.									
4	To: 3/10/2010 12:00:00 AM.									
5										
6	google.com	5	45	421	2,855	110	1:48:50	2,765	0	
7	yahoo.com	1	14	37	1,175	211	1:51:20	1,394	0	
8	msn.com	7	115	1,131	874	2,088	1:59:30	2,972	0	
9	142.102.19.27	6	17	147	507	0	0:38:0	507	0	
10	142.102.19.28	7	14	124	310	0	0:33:20	310	0	
11	innworldwide.com	1	8	57	269	28	0:19:40	297	0	
12	abdnk.com	2	31	281	221	359	0:27:40	579	0	
13	adobe.com	2	2	38	209	0	0:15:0	209	0	
14	microsoft.com	1	10	78	203	78	0:8:0	281	0	
15	142.117.0.48	1	1	1	1	192	0	0:9:30	192	0
16	www.google.ca	2	23	200	198	168	0:28:30	358	0	
17	161.218.142.32	1	1	1	13	178	0	0:8:30	178	0
18	meebo.com	1	7	61	166	0	0:21:50	166	0	
19	useplane.com	1	8	7	15	19	0:23:0	17	0	
20	mondrianaadvertising.com	2	2	19	150	302	0	0:60:45	0	
21	142.113.112.169	1	1	1	146	0	0:6:30	146	0	
22	142.113.72.82	1	1	1	13	198	0	0:5:10	138	0
23	142.117.26.16	1	1	1	13	134	0	0:6:10	134	0
24	break.com	2	2	26	127	200	0:14:20	335	0	
25	google syndication.com	1	1	7	126	126	0:18:10	237	0	
26										
27										
28	Grand Total: 50, 347, 3,210, 0, 116, 3,691, 10, 29:50, 11,807, 0.									
29	Site Count: 20.									
30										
31	3/11/2010 4:44:13 PM, M06 Security Enterprise Reporter.									
32	Filter: None.									
33	Generated by manager.									
34										

Fig. 3-3-4 Sample Executive Report in the CSV format

The header of the generated report includes the report title, Sort Order, and date range (MM/D/YYYY HH:MM:SS AM/PM format).

The body of the report includes a row containing column labels, followed by rows of user data with values corresponding to each column.

Totals display after the last row of user data.

The footer of the report includes the date and time the report was generated, product name, Filter specifications, and the login ID of the user who generated the report.

## Executive Report in the PNG format

Clicking the **PNG** button opens a separate browser window containing the Executive Report in the .png format:

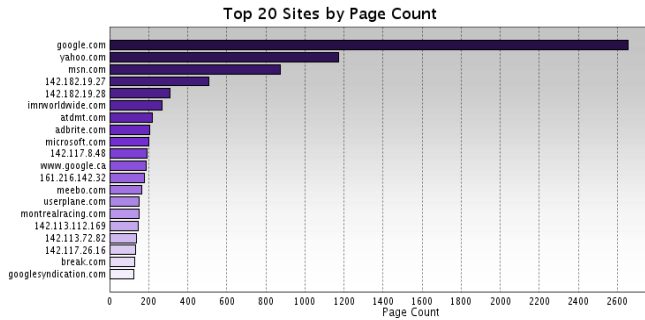


Fig. 3:3-5 Sample Executive Report in the PNG format

The generated report includes the report title followed by a graphical chart image:

- Bar chart - name of category, username, username path, URL or site IP address, user group name, or blocked user request, and corresponding bar graph. Beneath the bar graph are count indicators and a label describing the type of Count used in the report.
- Pie chart - color-coded pie graph showing a maximum of 15 categories or user groups. Any categories or user groups with page counts totalling less than one percent are grouped together under the “Others Combined” label.

## ***Export an Executive Report***

From the open generated report file, the Executive Report can be exported in some of the following ways:

- print the report - select the print option from the toolbar—or click the print icon—to open the Print dialog box, and proceed with standard print procedures.
- save the report - select the save option from the toolbar—or click the save icon—to open the Save a Copy dialog box, and proceed with standard save procedures.

## Chapter 4: Summary and Detail Reports

The two basic reports administrators and sub-administrators can generate with customizations are the summary report and the detail report. Report views for these reports are implemented via the Drill Down Reports and the Custom Reports sections of the Client application.

While summary and detail reports share some common components with Executive Reports and Wall Clock Time or Blocked Request reports, each kind of report also has its own unique components.

Before you begin generating report views for these reports, we recommend that you review this chapter in order to become familiar with the organization of summary and detail report views, and how report view tools and components are used in creating summary drill down reports and detail drill down reports customized to your specifications.



**NOTE:** *When generating reports on a consolidated ER (CER), depending upon the storage capacity of the remote ER Servers, the summary data for a particular date scope displayed on the CER may not have any detail data corresponding to it on the remote ERs. This occurs when the detail data for a particular date scope on the remote ERs has been expired and the summary data stored on the CER has not. If you encounter this situation, upon execution of your query, you will get the message “No Records Found”. (See the ER Server Information sub-section from Settings in Chapter 2: Customizing the Client for more information about data expiration.)*



## Summary Drill Down Report View

The summary drill down report view provides a snapshot of end user activity for a specified report type and defined date of activity recorded by the ER Server.

These reports are generated via menu options from Drill Down Reports and the Custom Report Wizard from Custom Reports.

Category	IP	User	Site	Page Count	Object Count	Time
Search Engines		95	54	2,262	8,242	8:46:25
Information Technology		73	83	236	6,054	7:57:45
Yahoo! Mail		12	12	12	3,702	22
Newsletters		82	87	140	2,476	6:40:20
Web Based Email		24	24	22	2,622	4:53:56
General Business		84	87	100	2,086	3:18:10
RSS		30	36	21	1,866	7:15
Edge Content Enhancement		66	66	25	1,460	1:21:30
Windows Live Messenger		4	6	30	1,247	3:2
Jobboards		2	2	2	1,130	6:5
Shopping		66	67	66	876	2:53:4
Financial Institution		27	30	80	891	4:51
Search Engines/Edge Search		83	84	24	800	1:28:25
Flash Video		16	16	112	794	6:27
Miscellaneous Sites		83	86	4	736	2:57
Reference		29	29	27	693	0:48:30
Parents		40	40	14	889	2:27:4
Online Communities		12	12	6	622	1:16:46
Weather/Travel		3	10	6	616	0:23:10
News		40	46	61	454	0:37:40
Chat		17	17	4	381	1:5
Image Chat		6	6	6	376	0:52:10
Web Log/Personal Pages		24	27	37	306	0:33:40
Remote Streaming Media		36	36	26	266	1:17:1
IRC & IM		6	7	36	264	0:18:40
Music & Television		6	16	17	212	0:16:40
Internet Service Provider		12	12	6	216	0:16:50
Pseudo Self-Its Sites		2	6	140	116	0:13:10

Fig. 3:4-1 Summary Drill Down Report view (administrator)

The summary drill down report view is horizontally organized into three sections:

- Header section - includes buttons for customizing the current view: New Report, Modify Report, Export Report, Save Report, and Set Result Limit. The following information displays beneath the row of buttons: Report type, Display criteria, Date, Search criteria, Sort by criteria. Beneath this row of data, the navigation path for the first record in the current report view displays to the far left. The Record navigation field at far right lets you navigate to a specific record and includes the total number of records.



Similarly with summary reports, these reports are generated via menu options from Drill Down Reports and the Custom Report Wizard from Custom Reports.

As with the summary report view, the detail report view is also horizontally organized into three sections but includes different content in its header and body:

- Header section - includes the following data: report type, Date, Sort by criteria, and Display information for records. Checkboxes (used for specifying columns to be included in the body of the report) display to the right of this information: Category, User IP, User name, Site, Filter Action, Content Type, Content, and Search String. The following buttons display below: Modify Report, UnCheck All / Check All. The following Other Options buttons display to the right: Export Report, Save Report, and New Report. The navigation path for the first record in the current report view displays below to the far left. The Record navigation field at far right lets you navigate to a specific record and includes the total number of records.
- Body section - includes rows of records returned by the reporting query. The Date and URL columns display for each record, along with any of the following columns specified by populating the corresponding checkbox in the header: Categories, User IP, User name, Site, Filter Action, Content Type, Content criteria, Search String, URL (hyperlink).
- Footer section - includes the username of the login ID used for this session (Logged in as).

## Report View Tools and Usage Tips

Understanding report view tools and their functions is paramount to generating a report containing relevant content, since the usage of these tools determines the results of your query.

As you will learn from the rest of this chapter, report view tools along with report view components help you create the desired report view. This report view can then be exported, saved, and/or scheduled to run at a specified time.

### Navigation Tips

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#### Back button

If using Internet Explorer, click the Back button in the toolbar of the browser window to return to a previous page in the current report.

#### Record navigation field

The total number of records displays to the right of the Record navigation field, located above the rows of records:

Record:    of 500

This indicator helps you determine how long it will take to generate a report view or to print a report. If there are many records, you may wish to filter your results to reduce the time it will take to process the report.

The selected record is designated by the record number displayed in the Record navigation field, and by an arrow ► to the left of a record in the body of a report view.

















To select another record, do any of the following:

- click the specified row to display the arrow preceding that record, and the record number in the Record navigation field.
- in the **Record** navigation field, enter a new record number in the white box between the arrow buttons to go to that record.
- in the Record navigation field, click any of the four arrow buttons to advance forward or backward through the list of records. In the order in which they display in the Record field, clicking these buttons moves you to the first record, the record prior to the selected record, the record following the selected record, and the last record.

## Summary Report View Tools and Tips

### Filter columns and buttons

In a summary drill down report view, filter columns display after the column containing the record name, and precede the Count columns (Category Count, IP Count, User Count, Site Count, Page Count, Object Count, Time HH:MM:SS). Filter columns include an oblong button for each record in the report view.

	Categories	Category/ IPs	Category/ Users	Category/ Sites
<input checked="" type="checkbox"/>	Instant_Messaging			
<input checked="" type="checkbox"/>	Search_Engines			
<input checked="" type="checkbox"/>	General_Business			
<input checked="" type="checkbox"/>	Banner/Web Ads			
<input checked="" type="checkbox"/>	Chat			

Clicking a specific filter button for a record gives more in-depth analysis on a given record displayed in the current view.

## Count columns and column arrows

In a summary drill down report view, columns for specified “item counts” display in the body of the report view. The column for the current report type does not display and therefore cannot be selected.

Category Count	IP Count	User Count	Site Count	Page Count	Object Count	Time HH:MM:SS
	63	37	132	35,963	434	95:40:20
	95	60	60	6,885	6,088	10:59:0
	97	57	116	4,542	6,919	8:19:10
	94	56	87	4,458	8,883	8:8:0
	30	20	12	3,223	207	7:33:30

- Category Count** - displays the number of categories a user has visited, or the number of categories included within a given site. Categories are set up for the Web Filter via the Settings menu option. It is possible for a site to be listed in more than one category, so even if a user has visited only one site, this column may count the user’s visit in two or three categories.
- IP Count** - displays the number of sites or categories visited by the IP address on the user’s machine.
- User Count** - displays the number of individuals who have visited a specific site or category.
- Site Count** - displays the number of sites a user has visited, or the number of sites in a category. This figure is based on the root name of the site. For example, if a user visits www.espn.com, www.msn.com, and www.foxsports.com, that user will have visited three pages. If that same user additionally visits www.espn.com/scores, the total number of sites visited would still count as three—and not as four—because the latter page is on the original ESPN site that was already counted.

- **Page Count** - displays the total number of pages visited. A user may visit only one site, but visit 20 pages on that site. If a user visits a page with pop-up ads, these items would add to the page count. If a page has banner ads that link to other pages, these items also would factor into the page count. In categories that use a lot of pop-up ads—porn, gambling, and other related sites—the page count usually exceeds the number of objects per page.

By clicking the arrow to the right of any record in this column, the detail report view displays data for all pages accessed, including hyperlinks to those pages. In the detail report view, you have the option to exclude Information columns for Category, User IP, User name, Site, Filter Action, Content Type, Content criteria, and Search String by clicking the corresponding checkboxes.

- **Object Count** - displays the number of objects on a Web page. All images, graphics, multimedia items, and text items count as objects. The number of objects on a page is generally higher than the number of pages a user visits.

However, if an advertisement or banner ad (an object on the page) is actually a page from another site, this item would not be classified as an object but as a page, since it comes from a different server.

By clicking the arrow to the right of any record in this column, the detail report view displays data for all objects accessed, including hyperlinks to those objects. In the detail report view, you have the option to include Information columns for Category, User IP, User name, Site, Filter Action, Content Type, Content criteria, and Search String by clicking the corresponding checkboxes.



**NOTE:** If “Pages only” was specified in the Object Count frame of the Optional Features screen in the Administrator user interface, **all** records of objects accessed by end users will be lost for the time period in which this option was enabled. Even if there were objects accessed by end users during that time period, zeroes (“0”) will display in the Object Count column in the report. See the Optional Features sub-section of the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for information about Object Count frame options.

- **Time HH:MM:SS** - displays the amount of time a user spent at a given site. Each page detected by a user’s machine adds to the count. If a browser window is opened to a certain page and left there for an extended time period, and that page is refreshed by either the user or a banner ad, the counter starts again and continues as long as Web activity is detected. If that Web page contains an active banner ad that refreshes the page every 10 to 30 seconds, a user could show an incredibly high page count and many minutes, even though only one page was opened by that user.

## Column sorting tips

To sort summary report view records in ascending/descending order by a specified column, click that column’s header: Category Count, IP Count, User Count, Site Count, Page Count, Object Count, or Time HH:MM:SS).

Click the same column header again to sort records for that column in the reverse order.

Click another column header to sort records by that specified column.



## Record exportation

In a summary drill down report view, each record is preceded by a checkbox that is populated (selected) by default.

<input checked="" type="checkbox"/>	Categories	Category/ IPs	Category/ Users	Category/ Sites	
<input checked="" type="checkbox"/>	Instant_Messaging	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	
<input checked="" type="checkbox"/>	Search_Engines	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	
<input checked="" type="checkbox"/>	General_Business	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	
<input checked="" type="checkbox"/>	Banner/Web_Ads	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	
<input checked="" type="checkbox"/>	Chat	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	

When exporting a report, only selected records are included. To de-select a record, click the checkbox to remove the check mark from the checkbox.

To de-select all records, click the checkbox in the column header. Clicking the checkbox in the column header again reselects all records.

## Detail Report View Tools and Tips

### Page link navigation

If more than one page of records was returned by a detail report query, one or more Page numbers display(s) above the rows of records: Page: 1 [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [Next](#)

Click the page number to navigate to that page of records.

### Report Type columns

In the detail report view header, by default all checkbox(es) are populated to include all column(s) for records in the current report view. Any column can be hidden from view by clicking the corresponding checkbox to remove the check mark. Clicking **UnCheck All** excludes all columns from displaying in the current report view. This button toggles back to **Check All** when at least one of the checkboxes is empty.

DETAIL BY OBJECT REPORT  
 --> Categories  
 --> Date: 12/30/2009  
 --> Sort by: Date, Ascending  
 --> Display: All records

OTHER OPTIONS:  
[Export Report](#)  
[Save Report](#)  
[New Report](#)

Modify Report:  Category  Filter Action  
 User IP  Content Type  
 User  Content  
 Site  Search String

Shopping Record 1 of 457

Date	Category	User IP	User	Site	Filter Action	Content Type	Content	Search String
12/30/2009 12:09:36 AM	Shopping	10.1.1.47	testDomain\test\supUser76110	ebayimg.com	Allowed	Wildcard	http://ebayimg.com/	<a href="#">http://200...</a>
12/30/2009 12:09:42 AM	Shopping	10.1.1.103	testDomain\test\supUser27513	shoprogex.com	Allowed	URL	http://www.shoprogex.com/	<a href="#">http://www...</a>
12/30/2009 12:09:42 AM	Shopping	10.1.1.103	testDomain\test\supUser27513	shoprogex.com	Allowed	URL	http://www.shoprogex.com/	<a href="#">http://www...</a>
12/30/2009 12:09:42 AM	Shopping	10.1.1.103	testDomain\test\supUser27513	shoprogex.com	Allowed	URL	http://www.shoprogex.com/	<a href="#">http://www...</a>
12/30/2009 12:09:42 AM	Shopping	10.1.1.162	testDomain\test\supUser56408	ebayimg.com	Allowed	Wildcard	http://ebayimg.com/	<a href="#">http://200...</a>
12/30/2009 12:09:43 AM	Shopping	10.1.1.162	testDomain\test\supUser56408	ebayimg.com	Allowed	Wildcard	http://ebayimg.com/	<a href="#">http://200...</a>

- **Category** - displays the category name (e.g. "Alcohol").
- **User IP** - displays the IP address of the user's machine (e.g. "200.10.101.80").
- **User** - displays any of the following information: user-name, user IP address, or the path and username (e.g. "logo\admin\jsmith").
- **Site** - displays the URL the user attempted to access (e.g. "coors.com").

- **Filter Action** - displays the type of filter action used by the Web Filter in creating the record: "Allowed", "Blocked", "Warn Blocked" (for the first warning page that displayed for the end user), "Warn Allowed" (for any subsequent warning page that displayed for the end user), "Quota Blocked" (if a quota blocked the end user), "X-Strike", or "N/A" if the filter action was unclassified at the time the log file was created.
- **Content Type** - displays the method used by the Web Filter in creating the record: "Search KW" (Search Engine Keyword), "URL KW" (URL Keyword), "URL", "Wildcard", "Https High" (HTTPS Filtering Level set at High), "X-strike" (X Strikes Blocking), "Pattern" (Proxy Pattern Blocking), "File Type", "Https Medium" (HTTPS Filtering Level set at Medium), or "N/A" if the content was unclassified at the time the log file was created.
- **Content** - displays criteria used for determining the categorization of the record, or "N/A" if unclassified.
- **Search String** - displays the full search string the end user typed into a search engine text box in search sites such as Google, Bing, Yahoo!, MSN, AOL, Ask.com, YouTube.com, and MySpace.com—if the Search Engine Reporting option is enabled in the Optional Features screen of the Administrator user interface.



**NOTE:** Refer to the *Optional Features* screen sub-section of the *M86 ER Administrator User Guide* or *M86 IR Enterprise Reporter User Guide* for information about the Search String feature.

## Column sorting tips

To sort detail report view records in ascending/descending order by a specified column, click that column's header: Date, Category, User IP, User name, Site, Filter Action, Content Type, Content criteria, Search String, or URL.

Click the same column header again to sort records for that column in the reverse order.

Click another column header to sort records by that specified column.

## Page/Object viewing tip

Click the URL for a specified record to view the page or object currently indexed in the ER's memory.

## Truncated data viewing tip

To view the entire text that displays truncated in a detail report view column, mouse over the column to view the entire string of data in the column for a given record:



## Using escape characters in an NT domain query

When running a query on an NT domain and special characters are present in the search string, escape characters must be included in the username entry.

MySQL recognizes the following escape sequences:

- \ ' A single quote ( ' ) character.
- \" A double quote ( " ) character.
- \\ A backslash ( \ ) character.
- \% A percentage ( % ) character.
- \\_ An underscore ( \_ ) character.

### Example:

- Single quote: \'
- Original string: John Smith's
- New string: John Smith\'s

**Scenario 1:** If usernames are entered as follows:

```
CO-Administration\Steve.Williams  
CO-Financial\Susan.Reynolds
```

In order to find these users via a New Custom Report query in the ER client, you need to add a secondary "\" to all "\" entries in the string, as follows:

```
CO-Administration\\Steve.Williams  
CO-Financial\\Susan.Reynolds
```

**Scenario 2:** If a domain name precedes the username, as in the following entries:

```
COOP\CO-Administration\Steve.Williams  
COOP\CO-Financial\Susan.Reynolds
```


Entries should be as follows:

```
COOP\\CO-Administration\\Steve.Williams  
COOP\\CO-Financial\\Susan.Reynolds
```

## Header Buttons for Customization Options

Clicking a button in the header of a report view opens a pop-up box that lets you customize the current report view. The following header buttons are available in the summary and detail report views: New Report, Modify Report, Export Report, and Save Report.

The Set Result Limit button is additionally available in summary report views.

 **NOTE:** Information on using the fields in these pop-up boxes can be found in the Report View Components sub-section.

### New Report button

This option that is available in both summary and detail reports lets you generate a new drill down report view for a date range other than the current (default) date.

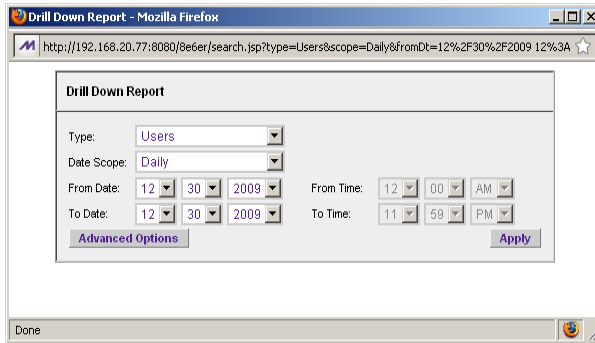


Fig. 3:4-3 New Drill Down Report pop-up box

Click the **Advance Options** button to display additional fields in this box that let you modify the way the view is sorted, or enter search criteria:

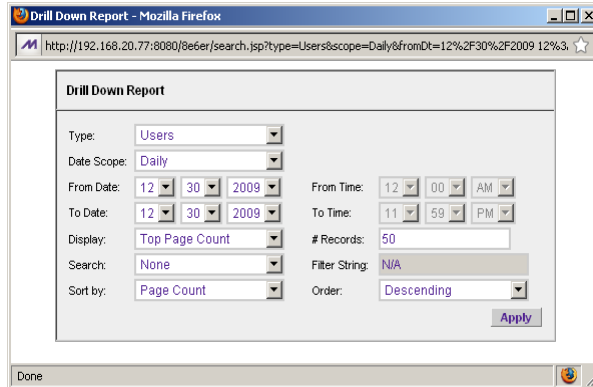




Fig. 3:4-4 New Drill Down Report with Advance Options

 **TIP:** To view only basic options, press the Back Space key on your keyboard to close the Advance Options display.

 **NOTE:** After all modifications are made, click **Apply** to save your settings and to close the pop-up box.

## Set Result Limit button

This option lets you specify the maximum number of records to be included in the summary report view, instead of the default number (entered in Default Options).

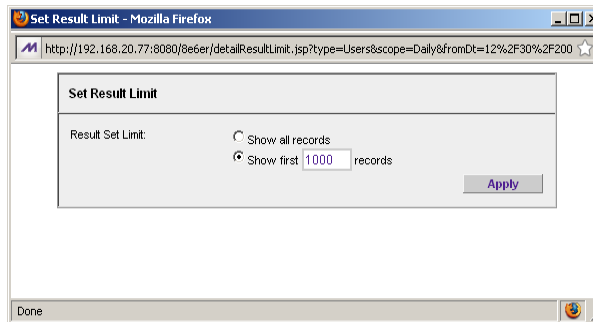



Fig. 3:4-5 Set Result Limit pop-up box

 **NOTE:** After all modifications are made, click **Apply** to save your settings and to close the pop-up box.

## Modify Report button

### *Drill Down Report option*

For summary reports, this option lets you modify the current report view by doing any of the following: specify the maximum number of records to be included other than the number entered in Default Options; perform a search for specified text, or sort the report in ascending or descending order by a specified column.

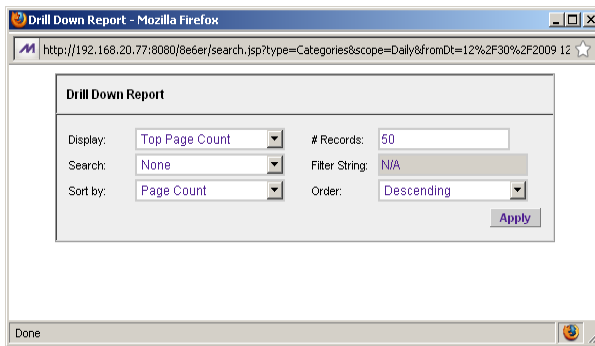


Fig. 3:4-6 Drill Down Report pop-up box

### *Detail Custom Report option*

For detail reports, this option lets you modify the current report view by doing any of the following: change the date scope, sort the report in ascending or descending order by a specified column, and specify the maximum number of records to be included other than the number entered in Default Options.



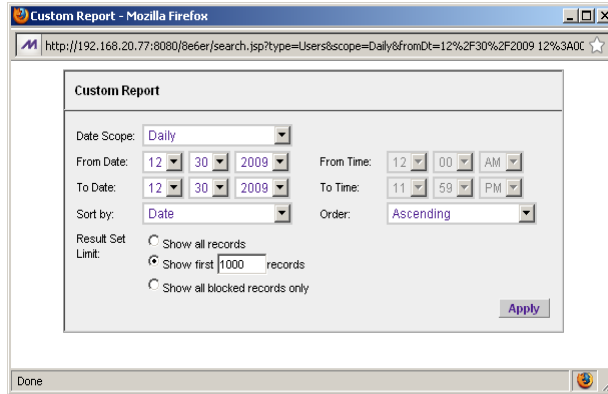



Fig. 3:4-7 Custom Report pop-up box

 **NOTE:** After all modifications are made, click **Apply** to save your settings and to close the pop-up box.

## Export Report button

### Export Drill Down Report option

This option lets you email or view the current summary report view in the specified output format.

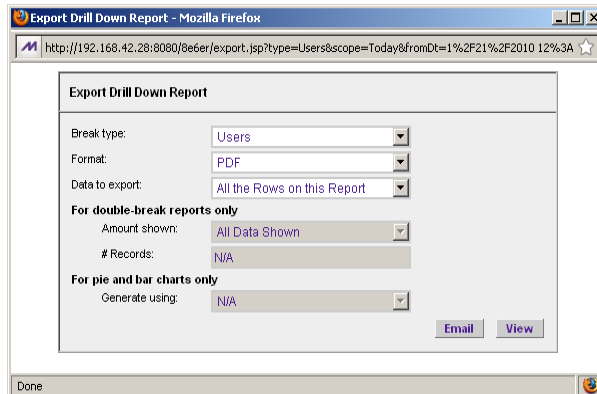


Fig. 3:4-8 Export Drill Down Report pop-up box

### Export Custom Report option

This option lets you email or view the current detail report view in the specified output format, defining the break type, file format, and maximum number of records to be included in the report view instead of the default number (entered in the Default Options window).

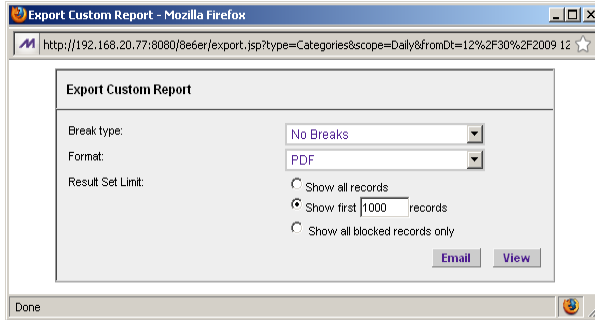


Fig. 3:4-9 Export Custom Report pop-up box



**NOTES:** After all modifications are made, click **Email** to open the Email Report pop-up box where email criteria is entered, or click **View** to launch a separate browser window containing the generated report in the specified format.

- See *Exporting a Report* in this chapter for information about using the Email option to email a report.
- See *View and Print Options* in this chapter for information about using the View option to view and print a generated report, and for sample reports.

## Save Report button

This option lets you save the current report view so a report using these customizations can be run again later at a designated time.

## Summary Drill Down Report option

Fig. 3:4-10 Save Custom Report pop-up box for summary reports



**TIP:** The Copy (Ctrl+C) and Paste (Ctrl+V) functions can be used in the fields in the Save Custom Report pop-up box.

### Detail Drill Down Report option

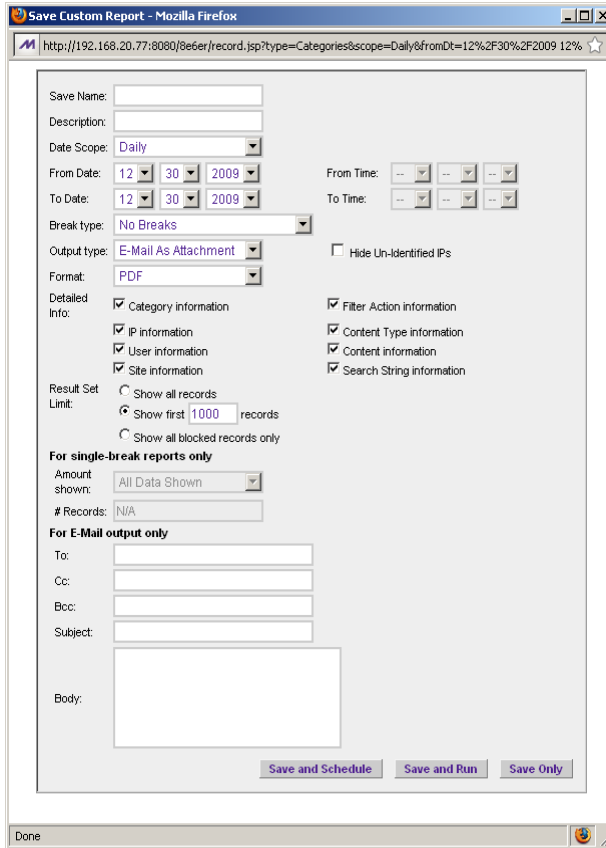


Fig. 3:4-11 Save Custom Report pop-up box for detail reports



**NOTES:** After all modifications are made, click **Save and Schedule** to open the Event Schedules window where a schedule can be set up for running the report, **Save and Run** to save the report in the specified format and then email it to the designated email address(es), or **Save Only** to save the report.

See Custom Report Wizard in Chapter 6 for information about using these report options.

## Report View Components

### Report Fields and Usage

---

The following fields are used in the Custom Report Wizard, Save Custom Report, and/or summary or detail report views and pop-up boxes linked to report views.

#### Type field

The Type field is used for specifying the report type for the summary report to be generated.

At the **Type** field, make a selection from the pull-down menu for one of the following report types:

- **Categories** - this option performs a query on filter categories accessed by end users.
- **IPs** - this option performs a query on Internet activity by end user IP address.
- **Users** - this option performs a query on end user Internet activity by username.
- **Sites** - this option performs a query on Web sites visited by end users.
- **Category Groups** - this option performs a query on end user Internet activity in category groups. Category groups are set up using the Category Groupings option from the Settings menu.
- **User Groups** - this option performs a query on Internet activity of user groups. User groups are set up using the User Groupings option from the Settings menu.

## Date Scope and Date fields

The Date Scope field is used for specifying the period of time to be included in the generated report view. Reports can be run for any data saved in the ER Server's memory.

At the **Date Scope** field, make a selection from the pull-down menu for the time frame you wish to use in your query (depending on the scope selected, the From Date and To Date fields are used in conjunction with this field):

- **Today** - this option generates the report view for today only, if logs from the Web access logging device have been received and processed.
- **Month to Date** - this option generates the report view for the range of days that includes the first day of the current month through today.
- **Monthly** - selecting this option activates the **From Date** and **To Date** pull-down menus where you specify the range of months (1-12) and/or years (2000-2011).
- **Year to Date** - this option generates the report view for the range of days that includes the first day of the current year through today.
- **Daily** - selecting this option activates the **From Date** and **To Date** pull-down menus where you specify the range of months (1-12), days (1-31), and/or years (2000-2011). The generated report view includes data for the specified days only, if the data for these days are stored on the Server.
- **Yesterday** - this option generates the report view for yesterday only.
- **Month to Yesterday** - this option generates the report view for the range of days that includes the first day of the current month through yesterday.

- **Year to Yesterday** - this option generates the report view for the range of days that includes the first day of the current year through yesterday.
- **Last Week** - this option generates the report view for all days in the past week, beginning with Sunday and ending with Saturday.
- **Last Weekend** - this option generates the report view for the past Saturday and Sunday.
- **Current Week** - this option generates the report view for today and all previous days in the current week, beginning with Sunday and ending with Saturday.
- **Last Month** - this option generates the report view for all days within the past month.

For detail reports, the following fields are additionally available:

- **Part of Today** - this option generates the report view for today's time range specified in the **From Time** and **To Time** fields. Make a selection for the hour (1-12), minutes (00-59), and AM or PM.
- **Part of Yesterday** - this option generates the report view for yesterday's time range specified in the **From Time** and **To Time** fields. Make a selection for the hour (1-12), minutes (00-59), and AM or PM.
- **Part of Specific Day** - this option generates the report view for the specified time range on the specified date. In the **From Date** and **To Date** fields, make a selection for the month (1-12), day (1-31), and year (2000-2011). In the **From Time** and **To Time** fields, make a selection for the hour (1-12), minutes (00-59), and AM or PM.
- **User Defined** - this option generates the report view for the specified time range within the specified date range. In the **From Date** and **To Date** fields, make a selection for the month (1-12), day (1-31), and year (2000-2011).

In the **From Time** and **To Time** fields, make a selection for the hour (1-12), minutes (00-59), and AM or PM.

## Display and # Records fields

The Display and # Records fields are used for specifying the number of records from the query you wish to include in the summary report view, and how these records will be sorted.

At the **Display** field, make a selection from the pull-down menu for the records to be shown on the screen: “All Data Shown”, “Top Category Count”, “Top IP Count”, “Top User Count”, “Top Site Count”, “Top Page Count”, “Top Object Count”, “Top Time”, “Top Hit Count”.

In the **# Records** field, “N/A” displays greyed-out if “All Data Shown” was selected at the Display field. If any other selection was made at the previous field, the default number saved in the Default Options window displays in this field. Enter the maximum number of top records to be included in the query.



**NOTE:** *The Default Top Value entry in the Default Options window is accessible via Default Options in the Settings menu. See the Default Options sub-section in Chapter 2: Customizing the Client for information about the Default Top Value.*

## Search and Filter String fields

The Search and Filter String fields are used for specifying search criteria in the current summary report view.

At the **Search** field, make a selection from the pull-down menu for the search term to be used: “None”, “Contains”, “Starts with”, “Ends with”.

In the **Filter String** field, “N/A” displays greyed-out if “None” was selected at the Search field. If any other selection was made at the previous field, enter text in this field corresponding to the type of search term selected.



## Sort by and Order fields

The Sort by and Order fields are used for specifying the manner in which the generated report view will be sorted.

For summary reports, at the **Sort by** field, make a selection from the pull-down menu for one of the available sort options: "Category Count", "IP Count", "User Count", "Site Count", "Page Count", "Object Count", "Time", "Hit Count".

For detail reports, at the **Sort by** field, make a selection from the pull-down menu for one of the available sort options: "Date", "Category", "User IP", "User", "Site", "Filter Action", "Content Type", "Content", "Search String", "URL".

At the **Order** field, make a selection from the pull-down menu for the order in which to display the sort option count: "Ascending", "Descending".

## Result Set Limit fields

The Result Set Limit fields are used for specifying the maximum number of records to be included in the report view.

Indicate the **Result Set Limit** by selecting the appropriate radio button:

- **Show all records** - Click this radio button to include all records returned by the report query.
- **Show first 'X' records** - Click this radio button to only include the first set of records returned by the report query.

Indicate the number of records to be included in a set by making an entry in the blank field, represented here by the 'X'.

- **Show all blocked records only** - Click this radio button to only include records for URLs that were blocked.

## Break type field

The Break type field is used for indicating the manner in which records will display for the specified format when the report view is emailed or viewed.

Choose from the available report selections at the **Break type** pull-down menu. Based on the current report view displayed, the selections in this menu might include the main report type such as “Sites”, or double-break report types such as “Users/Sites”.

## Format field

The Format field is used for specifying the manner in which text from the report view will be outputted.

At the **Format** pull-down menu, choose the format for the report: “MS-DOS Text”, “PDF”, “Rich Text Format”, “HTML”, “Comma-Delimited Text”, “Excel (Chinese)”, “Excel (English)”.

## Data to export field

The Data to export field is used for specifying which records will be exported when the generated summary report is emailed or viewed.

At the **Data to export** field, select the amount of data to be exported from the pull-down menu: “All the Rows on this Report”, or “Only the Selected Rows on this Page”. The second selection is available only if some of the records in the report view were deselected.

## For double-break reports only

The Amount shown and # Records fields are used in double-break reports and are deactivated by default.



**NOTE:** *These fields also display in Save Custom Report under the label: For single-break reports only.*

### **Amount shown field**

The Amount shown field is used for specifying how the report view will be sorted. By default, “All Data Shown” displays greyed-out and this field becomes activated when a double-break report type is selected at the Break type field.

At the **Amount shown** field, make a selection from the pull-down menu for an available sort option: “All Data Shown”, “Top Category Count”, “Top IP Count”, “Top User Count”, “Top Site Count”, “Top Page Count”, “Top Object Count”, “Top Time”, “Top Hit Count”.

### **# Records field**

The # Records field is used for specifying the number of records that will display for the selected sort option. By default, “N/A” displays greyed-out and this field becomes activated when a Top item Count is selected at the Amount shown field.

In the activated **# Records** field, the number saved in the Default Options window displays by default. This number can be edited to indicate the number of records to be included in the exported report.



**NOTE:** *The Default Top Value entry in the Default Options window is accessible via Default Options in the Settings menu. See the Default Options sub-section in Chapter 2: Customizing the Client for information about the Default Top Value.*

## For pie and bar charts only

### **Generate using field**

The Generate using field is used for specifying how a Categories pie chart or bar chart will be sorted. By default, “N/A” displays greyed-out and this field becomes activated when a pie or bar chart report type is selected from the Break type pull-down menu.

At the activated **Generate using** field, make a selection from the pull-down menu for the sort option to be used: “IP Count”, “User Count”, “Site Count”, “Page Count”, “Object Count”, “Time”, “Hit Count”.

### **Output type field**

The Output type field is used for specifying how the generated report will be sent to the recipient(s).

At the **Output type** field, choose either “E-Mail As Attachment”, or “E-Mail As Link”.

### **Hide Un-Identified IPs checkbox**

The Hide Un-Identified IPs checkbox is used for specifying whether or not IP addresses of workstations that are not assigned to a designated end user will be included in reports. This checkbox is deselected by default if the checkbox by this same name was deselected in the Default Options window.



**NOTE:** *The Default Options window is accessible via Default Options in the Settings menu. See the Default Options subsection in Chapter 2: Customizing the Client for more information about the Hide Un-Identified IPs option.*

To change the selection in this field, click the **Hide Un-Identified IPs** checkbox to remove—or add—a check mark in the checkbox. By entering a check mark in this checkbox, activity on machines not assigned to specific end users will

not be included in report views. Changing this selection will not affect the setting previously saved in the Default Options window.

## For E-Mail output only / Email Report fields

The For E-Mail output only fields and Email Report fields are used for entering email criteria pertinent to the report to be sent to the designated addressee(s).

Specify the following in the **For E-Mail output only** field or the Email Report pop-up box fields:

- **To** - enter the email address of each intended report recipient, separating each address by a comma (,) and a space.
- **Subject** - type in a brief description about the report.
- **Cc** (optional) - enter the email address of each intended recipient of a carbon copy of this message, separating each address by a comma (,) and a space.
- **Bcc** (optional) - enter the email address of each intended recipient of a blind carbon copy of this message, separating each address by a comma (,) and a space.
- **Body** - type in text pertaining to the report.

## Detailed Info field

The Detailed Info field is used for specifying which columns of data will be excluded from detail reports.

In the **Detailed Info** field, by default all checkboxes corresponding to detail report columns are selected. Click the checkbox corresponding to any of the following options to remove the check marks and thereby exclude those columns of information from displaying in the report:

- **Category information** - click this checkbox to exclude the column that displays the library category name.

- **IP information** - click this checkbox to exclude the column that displays the end user IP address.
- **User information** - click this checkbox to exclude the column that displays the username.
- **Site information** - click this checkbox to exclude the column that displays the IP addresses or URLs of sites.
- **Filter Action information** - click this checkbox to exclude the column that displays the type of filter action used by the Web Filter in creating the record: "Allowed", "Blocked", "Warn Blocked" (for the first warning page that displayed for the end user), "Warn Allowed" (for any subsequent warning page that displayed for the end user), "Quota Blocked" (if a quota blocked the end user), "X-Strike", or "N/A" if the filter action was unclassified at the time the log file was created.
- **Content Type information** - click this checkbox to exclude the column that displays the method used by the Web Filter in creating the record: "Search KW" (Search Engine Keyword), "URL KW" (URL Keyword), "URL", "Wildcard", "Https High" (HTTPS Filtering Level set at High), "X-strike" (X Strikes Blocking), "Pattern" (Proxy Pattern Blocking), or "N/A" if the content was unclassified at the time the log file was created.
- **Content information** - click this checkbox to exclude the column that displays criteria used for determining the categorization of the record, or "N/A" if unclassified.
- **Search String information** - click this checkbox to exclude the column that displays the full search string the end user typed into a search engine text box. This column displays pertinent information only if the Search Engine Reporting option is enabled in the Optional Features screen of the Administrator user interface.



**NOTE:** Refer to the *Optional Features* screen sub-section of the *M86 ER Administrator User Guide* or *M86 IR Enterprise Reporter User Guide* for information about the Search String feature.

## Exporting a Report

The email option for exporting reports lets you electronically send the report in the specified file format to designated personnel.



**NOTES:** If you are using Lotus Notes as your primary e-mail client instead of Microsoft Outlook or Outlook Express, refer to Appendix B for information on how to configure Lotus Notes to work with the ER Client.

For reports generated in the HTML format, the contents of the file will be embedded in the email message. For reports generated in any other format [MS-DOS Text, PDF, Rich Text Format, Comma-Delimited Text, Excel (Chinese), Excel (English)], the file will be sent as an email attachment.



**WARNING:** If using a spam filter on your mail server, email messages or attachments sent by the Client might not be delivered if these messages contain keywords that are set up to be blocked. Consult with the administrator of the mail server for work around solutions between the spam filter and mail server.

1. In the Export Drill Down Report or Export Custom Report pop-up box, click the **Email** button to open the Email Report pop-up box:

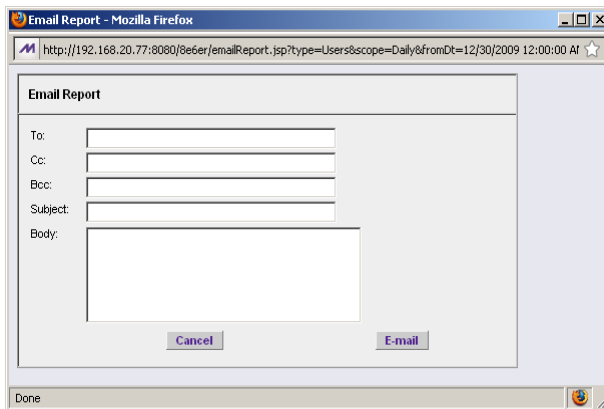




Fig. 3:4-12 Email Report pop-up box

2. In the **To** field, enter the email address of each intended report recipient, separating each address by a comma (,) and a space.
3. An entry in each of the following fields is optional:
  - **Subject** - Type in a brief description about the report.
  - **Cc** - Enter the email address of each intended recipient of a carbon copy of this message, separating each address by a comma (,) and a space.
  - **Bcc** - Enter the email address of each intended recipient of a blind carbon copy of this message, separating each address by a comma (,) and a space.
  - **Body** - Type in text pertaining to the report.

 **TIP:** Click **Cancel** to close the Email Report pop-up box and to return to the report view.

4. Click **E-mail** to send the report to the designated recipient(s). As a result of this action, the Email Report pop-up box now displays information to indicate the report is being generated.



 **WARNING:** Large reports might not be sent due to email size restrictions on your mail server. The maximum size of an email message is often two or three MB. Please consult your mail server administrator for more information about email size restrictions.

After the report is generated in the specified file format, the Email Result pop-up box displays this message: “The report has been sent to the following address(es)”, and lists the email address(es) below:

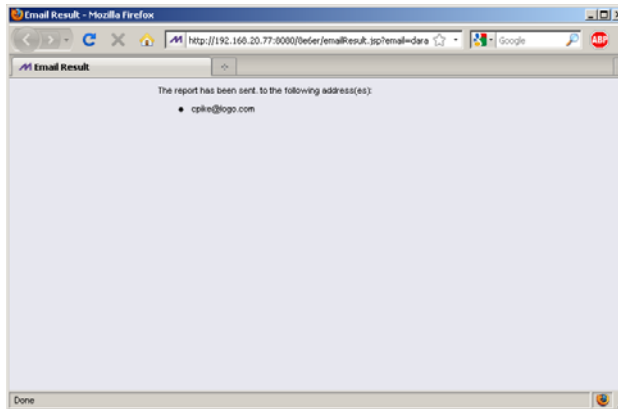


Fig. 3:4-13 Email Result pop-up box

5. Click the “X” in the upper right corner of the Email Result pop-up box to close it.

## ***View and Print Options***

The view and print options for exporting reports let you view/print the report in the specified file format. The view option lets you make any necessary adjustments to your report file settings prior to printing the report. To print the report, you must have a printer configured for your workstation.

In the Export Drill Down Report or Export Custom Report pop-up box, click the **View** button to open the ER Report browser window/tab containing the status of the report being generated.

When completely generated, the ER Report browser window/tab displays “Report Finished” and can be closed. The generated report view opens in a separate window in the specified file format.



**NOTE:** *Reports generated in the format for MS-DOS Text, Comma-Delimited Text, or Excel (Chinese or English) will display a single row of text for each record. Reports generated in all other formats (PDF, Rich Text Format, HTML) will display any lengthy string of text wrapped around within a fixed column width for each record.*

## View and Print Tools

---

In the browser window containing the report, the tools available via the toolbar let you perform some of the following actions on the open report file:

### File:

- **Save** (Ctrl+S) or **Save As** - save the report file to your local drive
- **Print** (Ctrl+P) - open the Print dialog box where specifications can be made before printing the report file, such as changing the orientation of the printed page by selecting **Portrait** (vertical) or **Landscape** (horizontal).

### Edit:

- **Select All** - highlight the entire text (Ctrl+A), and then Copy (Ctrl+C) and Paste (Ctrl+V) this text in an open file
- Perform a search for text > **Find** - search for specific text in the file (Ctrl+F)

To close the report file window/tab, click the "X" in the upper right corner of the window/tab.

## Sample Report File Formats

---

The following report file formats are available for emailing and viewing: MS-DOS Text, PDF, Rich Text Format, HTML, Comma-Delimited Text, Excel (Chinese), Excel (English).



**NOTES:** *M86 Security recommends using the PDF and HTML file formats over other file format selections—in particular for detail reports—since these files display and print in a format that is easiest to read. Lengthy text in PDF, HTML, and Rich Text Format files wraps around within the column so all text is captured without displaying truncated.*

*Comma-Delimited Text and Excel report columns may display with truncated text, but an entire column can be viewed by manipulating the column width in the generated report file. These reports can then be printed at a smaller percentage than normal size in order to accommodate all text.*

*For MS-DOS Text reports, text may display truncated—in particular for lengthy usernames and URLs in detail reports—but an entire column can be viewed by scrolling to the right. Since there is no way to manipulate text in the generated report file, the printed report may display with truncated text. However, the maximum amount of text can be captured by printing the report in the landscape format.*

## MS-DOS Text

This is a sample of the Category Groups report in the MS-DOS Text format, saved with a .txt file extension:

Category Groups  
 Sort Order: Page Count, descending  
 From: 12/30/2009 12:00:00 AM  
 To: 12/30/2009 11:59:59 PM

Category Groups	Category	IP Count	User Count	Site Count	Page Count	Object Count	Time (MM:SS:SS)	Hit Count	Blocked Hits	
Information Technology	4	241	1,764	50	1,193	3,512	4:21:20	6,715	0	
Internet Communication	4	81	599	21	1,001	628	2:10:20	1,629	0	
Internet Productivity	4	84	810	45	617	1,441	1:51:50	2,278	0	
Web Threats	3	35	290	16	535	828	1:59:10	1,373	0	
Entertainment	7	37	254	32	324	1,926	0:33:10	2,250	0	
Shopping	2	17	116	21	312	456	0:24:10	960	0	
Business/Investments	4	73	354	34	265	4,497	0:16:10	4,752	0	
Travel/Events	3	14	114	16	106	1,532	0:13:50	1,718	0	
Adult Content	4	9	90	13	141	603	0:21:10	764	0	
Recreation	4	21	175	18	154	660	0:14:20	814	0	
News/Reports	3	38	237	28	329	1,431	0:15:20	1,940	0	
Society/Lifestyles	3	21	142	12	95	1,017	0:11:10	1,112	0	
Games	1	6	46	5	57	67	0:15:50	124	0	
Government/Law/Politics	1	4	27	4	21	308	0:2:20	329	0	
Streaming Media	1	6	58	6	14	184	0:2:20	398	0	
Education	2	6	48	6	7	85	0:1:10	92	0	
Remote Access	1	1	7	1	7	21	0:1:30	28	0	
Community/Organizations	1	1	4	1	4	0	0:0:40	4	0	
Security	1	1	4	1	4	0	0:0:40	4	0	
Health/Fitness	1	2	8	2	0	132	0:0:0	132	0	
<b>Grand Total</b>		<b>54</b>	<b>718</b>	<b>5,167</b>	<b>332</b>	<b>7,106</b>	<b>19,938</b>	<b>11:41:40</b>	<b>27,044</b>	<b>0</b>

Category Group Count: 20  
 12/31/2009 11:57:40 AM  
 Filter: None  
 Generated by: manager

Fig. 3:4-14 Category Groups report, MS-DOS Text file format

## PDF

This is a sample of the Category Groups report in the PDF format, saved with a .pdf file extension:

Category Group	Category	IP Count	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked
Information Technology	4	241	1,784	50	3,193	3,822	4:21:0	5,718	0
Internet Communication	4	81	595	21	1,051	826	2:10:20	1,029	0
Internet Productivity	4	84	820	48	617	1,861	1:55:0	2,278	0
Web Threats	3	85	390	18	886	618	1:01:0	1,173	0
Entertainment	7	37	254	32	324	1,926	0:33:10	2,200	0
Shopping	2	17	128	21	312	688	0:34:10	865	0
Business/Investments	4	73	854	34	288	4,487	0:26:10	4,782	0
Travel/Events	3	14	114	18	186	1,532	0:13:50	1,718	0
Adult Content	4	9	90	13	161	623	0:21:0	764	0
Sports/ath	4	21	178	18	184	660	0:14:20	814	0
News/Reports	3	28	237	28	129	1,431	0:15:20	1,680	0
Security/Reviews	3	21	142	12	86	1,017	0:11:0	1,112	0
Games	1	6	48	6	87	67	0:05:0	124	0
Government/Law/Politics	1	4	37	4	21	558	0:23:0	579	0
Learning/Tests	1	6	88	6	14	384	0:22:0	398	0
Education	2	6	48	6	7	85	0:11:0	92	0
Remote Access	1	1	7	1	7	21	0:11:0	28	0
Community/Organizations	1	1	4	1	4	0	0:04:0	4	0
Security	1	1	4	1	4	0	0:04:0	4	0
Health/Fitness	1	2	8	2	0	132	0:05:0	132	0
<b>Grand Total</b>		<b>54</b>	<b>718</b>	<b>332</b>	<b>7,106</b>	<b>19,938</b>	<b>11:41:40</b>	<b>27,044</b>	<b>0</b>
Count: 20									

12/31/2009 12:04:00 PM Generated by: manager Filter: None Page 1 of 1

Fig. 3.4-15 Category Groups report, PDF format



# HTML

This is a sample of the Category Groups report in the HTML format, saved with a .html file extension:

Category Group	IP Count	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
Information Technology	4	341	1,764	50	3,393	3,522	4,310	6,715
Internet Communication	4	81	599	21	1,891	426	2,102	1,826
Internet Productivity	4	84	520	45	617	1,661	1,530	3,278
Web Threads	3	55	390	16	555	618	1,910	1,173
Entertainment	7	37	254	32	324	1,826	0:33:10	2,250
Shopping	2	17	126	21	312	656	0:34:10	968
Business/Investments	4	73	554	34	265	4,487	0:36:10	4,252
Travel/Events	3	14	114	18	186	1,332	0:13:50	1,718
Adult Content	4	8	303	13	161	633	0:21:0	764
Bank/Fin	4	21	175	18	154	660	0:14:20	914
News/Reports	3	39	237	28	129	1,431	0:15:20	1,560
Society/Lifestyles	3	21	142	12	95	1,017	0:11:0	1,112
Games	1	6	46	5	57	67	0:5:30	124
Government/Law/Politics	1	4	27	4	21	508	0:2:20	529
Streaming Media	1	6	58	6	14	384	0:2:20	398
Education	2	6	48	6	7	85	0:1:10	92
Remote Access	1	1	7	1	7	21	0:1:10	28
Community/Organizations	1	1	4	1	4	0	0:0:40	4
Security	1	1	4	1	4	0	0:0:40	4
Health/Fitness	1	2	8	2	0	132	0:0:0	132
Category Groups								
Grand Total	54	718	5,167	332	7,336	19,308	11:41:40	27,044

12/3/2009 12:42:38 PM M86 Security Enterprise Reporter  
 Filter Name: Generated by: manager

Fig. 3:4-17 Category Groups report, HTML file format



## Comma-Delimited Text

This is a sample of the Category Groups report in the Comma-Delimited Text format, saved with a .csv file extension:

Category Groups	Category Count	IP Count	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
Information Technology	4	241	1,764	50	3,193	3,522	4:3:10	6,715	0
Internet Communication	4	81	599	21	1,001	628	2:10:20	1,629	0
Internet Productivity	4	84	520	45	617	1,661	1:5:50	2,278	0
Web Threats	3	59	390	16	555	618	1:9:10	1,173	0
Entertainment	7	37	254	32	324	1,926	0:33:10	2,250	0
Shopping	2	17	126	21	312	656	0:34:10	968	0
BusinessInvestments	4	73	554	34	265	4,487	0:36:10	4,752	0
TravelEvents	3	14	114	16	186	1,532	0:13:50	1,718	0
Adult Content	4	9	90	13	161	603	0:21:0	764	0
Bandwidth	4	21	175	18	154	660	0:14:20	814	0
News/Reports	3	38	237	28	129	1,431	0:15:20	1,560	0
Society/Lifestyles	3	21	142	12	95	1,017	0:11:0	1,112	0
Games	1	6	46	5	57	67	0:5:50	124	0
Government/Law/Politics	1	4	27	4	21	508	0:2:20	529	0
Streaming Media	1	6	58	6	14	384	0:2:20	389	0
Education	2	6	48	6	7	85	0:1:10	92	0
Remote Access	1	1	7	1	7	21	0:1:10	28	0
Community/Organizations	1	1	4	1	4	0	0:0:40	4	0
Security	1	1	4	1	4	0	0:0:40	4	0
Health/Fitness	1	2	8	2	0	132	0:0:0	132	0
Grand Total	54	718	5,167	332	7,106	19,938	11:41:40	27,044	0
Category Group Count	20								
12/31/2009 1:02:07 PM, M86 Security Enterprise Reporter									
Filter: None									
Generated by: manager									

Fig. 3-4-18 Category Groups report, Comma-Delimited Text file

## Excel (English)

This is a sample of the Category Groups report in the Excel (English) format, saved with a .xls file extension:

Category Groups	Category Count	IP Count	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
Information Technology	4	241	1,764	50	3,193	3,522		4,6715	0
Internet Communication	4	81	699	21	1,001	620		2,1,629	0
Internet Productivity	4	84	520	45	617	1,661		1,2,278	0
Web Threats	3	55	390	16	555	618		1,1,173	0
Entertainment	7	37	254	32	324	1,926		0,2,290	0
Shopping	2	17	126	21	312	656		0,968	0
Business/Investments	4	73	554	34	265	4,467		0,4,752	0
Travel/Events	3	14	114	16	196	1,532		0,1,718	0
Adult Content	4	9	90	13	161	603		0,754	0
Bandwidth	4	21	175	18	154	660		0,814	0
News/Reports	3	30	237	20	129	1,431		0,1,560	0
Society/Lifestyles	3	21	142	12	95	1,017		0,1,112	0
Games	1	6	45	5	27	67		0,124	0
Governments/Law/Politics	1	4	27	4	21	508		0,529	0
Streaming Media	1	6	58	6	14	304		0,395	0
Education	2	6	48	6	7	95		0,92	0
Remote Access	1	1	7	1	7	21		0,25	0
Community/Organizations	1	1	4	1	4	0		0,4	0
Security	1	1	4	1	4	0		0,4	0
Health/Fitness	1	2	8	2	0	132		0,132	0
Grand Total	54	718	5,167	332	7,106	19,930		11,27,044	0

Fig. 3-4-19 Category Groups report, Excel (English) file format



**NOTES:** The Excel (English) option supports up to 65,000 rows of exported data. If exporting more than 65,000 rows of data, M86 Security recommends using another format.

The Excel (Chinese) option supports up to 10,000 rows of exported data. If exporting more than 10,000 rows of data, M86 Security recommends using the PDF format option.

The number of rows that can be exported varies with each file format.

## Chapter 5: Drill Down Reports

This chapter provides information about generating drill down reports from the Drill Down Reports menu. As explained in the previous chapter, drill down reports let you query the database to access more detailed information about end user Internet activity. The following types of reports can be generated from this menu:

- **Categories** - includes data in each filter category that was set up for monitoring user activity.
- **IPs** - includes Internet activity by user IP address.
- **Users** - includes Internet activity by username.
- **Sites** - includes activity on Web sites users accessed.
- **Category Groups** - includes activity by category groups, if category groups previously have been set up via the Settings menu.
- **All User Groups** - includes activity by all user groups, if user groups previously have been set up via the Settings menu.
- **Single User Group** - after selecting the user group from a list of available choices, this report shows activity for that user group, if the user group previously has been set up via the Settings menu.

As previously discussed, once you have generated a drill down report view, you can customize your view, save the view, export the view, and/or schedule the report to run at a designated time.

# Generate a Drill Down Report

To generate a drill down report:

1. Click one of the following menu topics in the navigation toolbar for the type of report you wish to view: Categories, IPs, Users, Sites, Category Groups, All User Groups:

Category Groups	Group Category	Group IP	Group User	Group Site	Category Count	IP Count	User Count	Site Count	Page Count	Object Count	Time Interval
Internet Communication					4	241	1,704	95	3,363	3,832	4:30:00
Internet Communication					4	81	596	21	1,001	625	2:10:20
Internet Periodicity					4	84	530	40	817	1,881	1:50:00
Web Threats					3	65	393	10	555	819	1:8:10
Endpoint					3	20	294	34	344	1,508	9:40:00
Shopping					2	17	130	21	312	686	0:54:10
Business/Investments					4	73	504	34	305	4,487	0:36:30
Travel/Events					3	14	114	10	186	1,832	0:13:00
Adult Content					4	3	30	10	181	855	0:21:00
Banking					4	21	115	10	184	890	0:14:20
Health/Pharma					3	36	337	30	139	1,451	0:16:00
Security/Politics					3	21	142	12	95	1,017	0:11:00
Games					1	6	40	6	97	97	0:5:00
Government/Politics					1	6	37	4	21	80	0:2:00
Cleaning/Media					1	6	56	8	14	384	0:2:00
E-Retail					2	6	40	6	7	85	0:1:10
Mobile Apps					1	1	7	1	7	21	0:1:10
Community/Opinion					1	1	4	1	4	25	0:1:40
Security					1	1	4	1	4	12	0:2:40
Health/Pharma					1	2	6	2	0	132	0:0:0

Fig. 3:5-1 Sample Drill Down Category Groups Report



**NOTES:** As the report is generating, a message describing the current status displays. If no records are available, an alert box opens displaying the message “No records returned!”

Information on generating a Single User Group report view is provided in the Generate a Single User Group Report sub-section.

2. Once the generated report has loaded in the window, use the tools in the panel to create the desired drill down view.
3. The drill down view can be exported, saved, and/or scheduled to run at a specified time.

## Generate a Single User Group Report

To generate a Single User Group Report:

1. Click Single User Group from the Drill Down Reports menu to display the Single User Group window in the panel:



Fig. 3:5-2 Single User Group window

2. Specify the following report criteria: “Type”, “User Group”, “Date Scope”, and Advance Options such as “Display” / “# Records”, “Search” / “Filter String”, “Sort by” / “Order”.
3. Click **Apply** to generate the report. When the report has generated, the report view displays (see Fig. 3:5-1) and can be modified, exported, or saved.

## Chapter 6: Custom Reports

This chapter provides information about custom reports that can be generated if more specific details are needed about end user Internet activity.

The following options are available from the Custom Reports menu:

- **Custom Report Wizard** - this option lets you use the wizard to generate a customized report, querying the database for hits, pages, or objects viewed by end users.
- **Sample Custom Reports** - this option includes “canned” selections of 10 of the most popular reports that you can readily generate in the PDF format.
- **Wall Clock Time Report** - this option is available to administrators only. Wall Clock Time reports use the Wall Clock Time algorithm to calculate the amount of time each end user spent accessing a given page or object.



**NOTES:** *Wall Clock Time Report is only available in the Custom Reports menu if the Wall Clock Time feature is enabled in the Administrator user interface. See the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for information about the Wall Clock Time feature.*

*To include object hits in the Wall Clock Time Report, the “Pages and Objects” selection must be made in the Object Count frame of the Optional Features screen. See Optional Features in the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for more information about this selection.*

- **Blocked Request Report** - this option is available to administrators only. Blocked Request reports show data for all specified users’ blocked requests within the designated time frame.



**NOTE:** *Blocked Request Report is only available in the Custom Reports menu if the Block Request Count feature is enabled in the Administrator user interface. See the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for information about the Block Request feature.*

- **Saved Custom Reports** - this option lets you view, edit, copy, delete, or run a customized report that was previously saved in the Client.
- **Event Schedule** - this option is used for creating and maintaining schedules for generating customized reports.
- **Executive Internet Usage Summary** - this option, available to administrators only, is used for specifying email addresses of personnel authorized to receive a report containing charts showing activity in selected library category groups. Reports can be sent to specified recipients on a daily, weekly, and/or monthly basis.

## Custom Report Wizard

When clicking Custom Report Wizard in the Custom Reports menu, the main screen of the Custom Report Wizard displays in the panel:

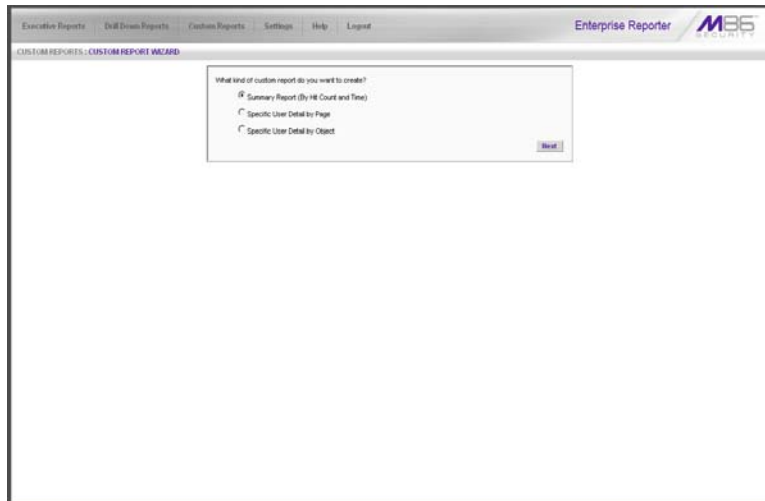


Fig. 3:6-1 Custom Report Wizard screen (administrator)



## Step 1: Specify Report Option

1. Select one of three available custom report options:
  - **Summary Report (By Hit Count and Time)** - this report provides a synopsis of specified end user Internet activity by hit count and time for a designated period.
  - **Specific User Detail by Page** - this report provides information about end user Web page access for a specified time period.
  - **Specific User Detail by Object** - this report provides information about end user Web object access for a specified time period.
2. Click **Next** to display the next screen of the wizard.

When selecting the summary report option, the following screen displays in the panel after clicking Next:

Fig. 3:6-2 Summary Report wizard screen (administrator)

When selecting the detail report option, the following screen displays after clicking Next:

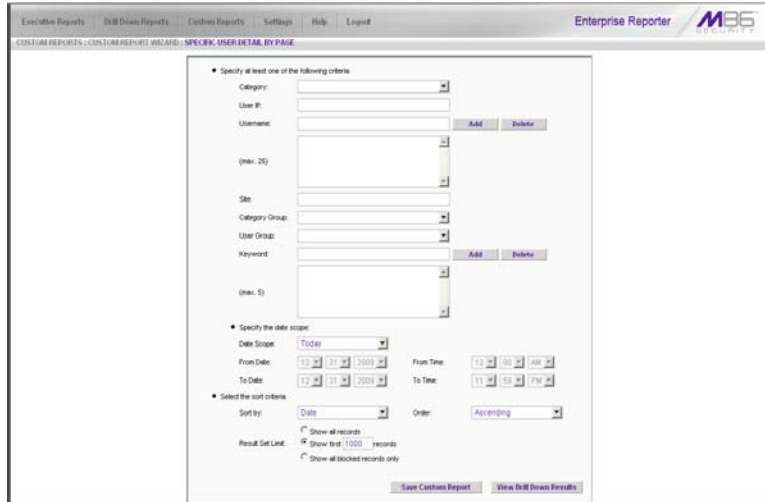


Fig. 3:6-3 Detail Report by Page wizard screen (administrator)



**NOTES:** The detail report by object screen is similar to the detail report by page screen, substituting the word “Object” for “Page” in the navigation path.

See Report View Components in Chapter 4: Summary and Detail Reports for various field entries in this wizard.

## Step 2: Specify Report Selection

### Summary report

Make a choice for the **Type** of report to be generated: “Categories”, “IPs”, “Users”, “Sites”, “Category Groups”, “User Groups”. This choice affects all other fields on the screen by enabling or disabling them as pertinent to your selection.

To **narrow** your results, choose from one of the following drill down report options: “Category”, “User IP”, “Username”, “Site”, “Category Group”, “User Group”.

### Detail report

Select at least one of the following **criteria** to be included in your query: “Category”, “User IP”, “Username”, “Site”, “Category Group”, “User Group,” “Keyword”.



**TIP:** The Username and Keyword fields can be used in conjunction or individually to specify the username(s) and/or URL substring(s)/keyword(s) to include in a query, as described in the following sub-sections.

### Batch user report

To generate a batch user report in which a single email is sent to the administrator with attached reports for up to 25 specified end users, make the following entries:

1. In the **Username** field, do one of the following to add a username in the list box below:
  - Type in the username
  - Enter valid alpha characters preceded and/or followed by a wildcard ('%'), or
  - Enter a wildcard ('%')
2. Click **Add**; if a wildcard was used and more than one match was found on the server, this action opens the

Specific Search pop-up box (see Fig. 3:6-8) that displays all available matches in the Username frame:

- a. Select up to 25 usernames from the pop-up box.
- b. Click **OK** to close the pop-up box and to populate the list box in the wizard screen.



**TIP:** To remove an entry from the list box, select it and then click **Delete**.



**NOTE:** If more than one Username is entered, the following message displays above the buttons at the bottom of this screen: 'NOTE: This report is very processor and time intensive and may take several minutes to complete.' and the **View Drill Down Results** button displays greyed-out. The report must now be saved and run at a later time.

### **URL sub-string, keyword report**

To generate a URL sub-string and/or keyword report, make the following entries:

1. In the **Keyword** field, do one of the following to add keywords/URL sub-strings in the list box below:
  - Type in a keyword at least three characters in length
  - Enter up to 255 characters of a phrase
2. Click **Add**.



**TIP:** To remove an entry from the list box, select it and then click **Delete**.



**NOTE:** After adding an entry in the **Keyword** field, the following message displays above the buttons at the bottom of this screen: 'NOTE: This report is very processor and time intensive and may take several minutes to complete.' and the **View Drill Down Results** button displays greyed-out. The report must now be saved and run at a later time.

### Step 3: Specify Date Scope

---

Select the **Date Scope** from the following choices available in the pull-down menu.



**NOTE:** *If more than one Username or if any Keyword was entered in this screen, the following Date Scope choices are the only choices available: “Yesterday” (default), “Previous 7 Days”, selections for Previous 6, 5, 4, 3, or 2 Days, and “Daily”.*

### Step 4: Specify Order Criteria

---

#### Summary report

Select the column for which top results should **Display** and indicate the **# Records**.

Specify the column the report should **Sort by** and in which **Order**.

#### Detail report

Select the column the report should **Sort by** and indicate in which **Order**.

Specify the **Result Set Limit** for the records to be included.

### Step 5: Specify when to Generate the Report

---

Indicate the next step in the wizard by selecting one of two choices that specify when the report will be generated:

- **Save Custom Report** - click this button to go to the Save Custom Report window where you save your report criteria now but generate your report later (see Save Custom Report).



**NOTE:** *See Save Custom Report in this chapter for information on using the Save Custom Report window, and Chapter 5: Drill Down Reports for information about drill down reports.*

- **View Drill Down Results** - click this button to view the generated Drill Down Report now in the specified report view format (see Figs. 3:6-4 and 3:6-5).



**NOTE:** The View Drill Down Results button greys-out if more than one Username or if any Keyword was entered for a detail report.

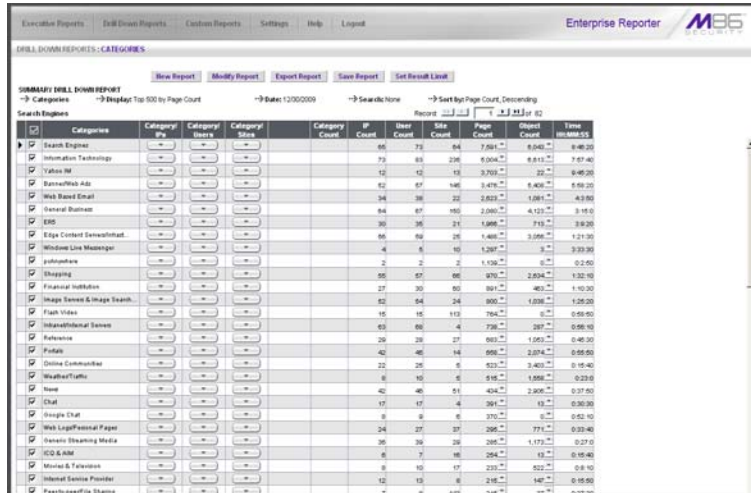


Fig. 3:6-4 Summary Drill Down Report (administrator)

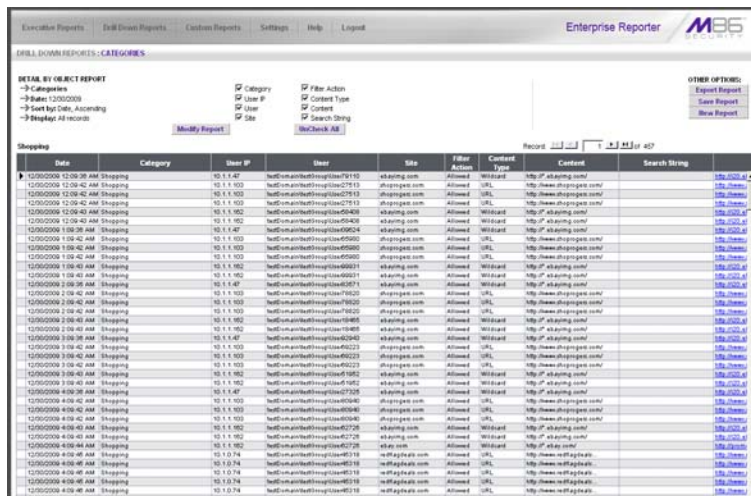


Fig. 3:6-5 Detail by Page Drill Down Report (administrator)

## Save Custom Report

1. Click the **Save Custom Report** button to display the Save Custom Report screen in the panel:

Fig. 3:6-6 Summary Save Custom Report (administrator)

Fig. 3:6-7 Detail Save Custom Report (administrator)

2. In the **Save Name** field, enter a name for the report. This name will display in the Report Name pull-down menu in the Saved Custom Reports option.



**TIP:** The Copy (Ctrl+C) and Paste (Ctrl+V) functions can be used in the fields in this screen.

3. In the **Description** field, enter the report description. This description will display in the Report Description field in the Saved Custom Reports option.
4. Make a selection from pull-down menus for the following fields:
  - **Date Scope** - to change the date scope specified in the report view, make a selection from available choices in the pull-down menus.
  - **Break type** - available selections are based on the type of report specified.
  - **Output type** - choose either E-Mail As Attachment, or E-Mail As Link.
  - **Format** - choose from available output format selections in the pull-down menu.
  - **Hide Un-Identified IPs** - this checkbox is de-selected by default if the checkbox by this same name was de-selected in the Default Options window.



**NOTE:** The Default Options window is accessible via Default Options in the Settings menu. See the Default Options subsection in Chapter 2: Customizing the Client for more information about the Hide Un-Identified IPs option.

5. For detail reports, specify any of the following options:
  - **Detailed Info** - uncheck any checkbox corresponding to a column that should not be included in the report.
  - **Result Set Limit** - indicate the maximum number of records to be included in the report.



6. **For double/single-break reports only**, if a selection was made in the Break type field, specify the top count option to be used in the **Amount shown** and **# Records** fields.
7. **For pie and bar charts only** in a summary report, if the report is being generated for Categories, Category Groups, or User Groups, and a selection was made in the Break type field, the **Generate using** field lets you select the count column sort option.
8. **For E-Mail output only**, type in the email address(es) of the recipient(s), and enter any pertinent information to be sent with the report.
9. Specify the next—or final—step in the wizard by selecting one of three choices:
  - **Save and Schedule** - click this button to save your entries and to go to the Event Schedules window where the Add Event to Schedule pop-up box opens so you can set up a schedule for running the report.
  - **Save and Run** - click this button to save your entries and to email the generated report to the designated recipient(s). After the report is emailed, the Saved Custom Reports window displays if you need to run this report again or another report.



**NOTE:** *If more than one Username or if any Keyword was entered in the report screen for a detail report, the Save and Run button is greyed-out and the following message displays above the buttons at the bottom of this screen: 'NOTE: This report is very processor and time intensive and may take several minutes to complete.'*

- **Save Only** - click this button to save your entries and to go to the Saved Custom Reports window where you can delete, edit, or run this report or another report.



**NOTE:** *See Event Schedules and Saved Custom Reports in this chapter for information on using these options.*



**TIP:** For an administrator, when specifying a save option, if the report Name you entered has already been used, a dialog box opens with the message: “Name already in use, would you like to overwrite? Event Schedules associated with this report will also be deleted.” You can choose to either overwrite the record with the current report criteria by clicking **OK**, or rename the report by clicking **Cancel** to close the dialog box without saving your edits.

## Wizard Reporting Tips

---

### Detail page Break report by Users, Category

To generate a detail report that includes page hits for the top users who accessed a specific category or category group:

1. Select “Specific User Detail by Page”, and then click **Next**.
3. Choose the **Category** or **Category Group**, and then click **Save Custom Report**.
3. Specify at least the following criteria: **Save Name**, **Break type** “Users”, **Amount shown** “Top Page Count”, and email **To** address.
4. Click **Save and Run** to generate and email the report to the designated email address.

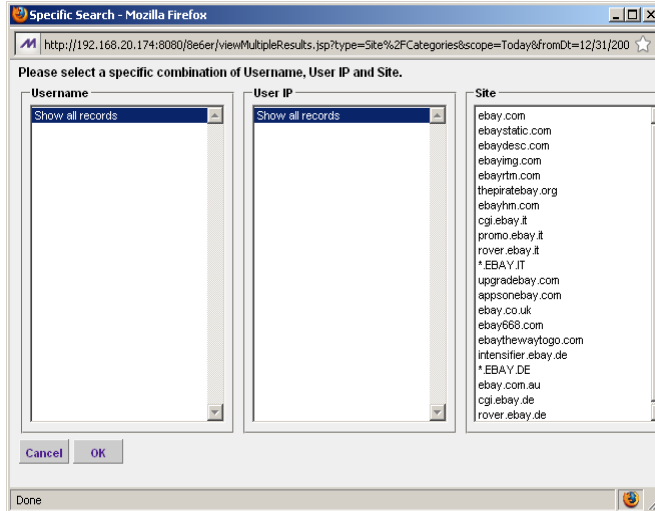
### Use wildcards in a Specific Search query

To generate a report for a specific username, user IP address, or site URL, enter the minimum criteria:

1. Select one of the three wizard options, and then click **Next**.
2. Specify the type of search to be performed by choosing the appropriate field (**User IP**, **Username**, or **Site**) and entering text in the following format: **%X%** (in which “X” represents the user’s IP address, the username, or the site URL).

**Examples:**

- User IP: **%200.10.100.51%**
  - Username: **%jsmith%**
  - Site: **%yahoo%**
3. Click **View Drill Down Results** to open the Specific Search pop-up box:



*Fig. 3:6-8 Specific Search pop-up box showing site results*

This pop-up box is comprised of three list boxes: Username, User IP, and Site. The list box pertinent to your query is populated with results—based on data stored in the system—returned by the search.

4. Make a selection from the list box, and then click **OK** to close the pop-up box and to begin generating the report.

## Sample Custom Reports

To generate a sample custom report:



1. Choose Sample Custom Reports from the Custom Reports menu, and then click one of the following Custom Report options: “Top 20 Categories by Page Count”, “Top 20 IPs by Category/IP”, “Top 20 Users by Category/User”, “Top 20 Users by Page Count”, “Top 20 Categories by User/Category”, “Top 20 Sites by User/Site”, “By User/Category/Site”, “Top 20 Sites by Category/Site”, “By Category/Site/IP”, “By Category/User/Site”.



Fig. 3:6-9 Sample Custom Reports (administrator)

When the report has been generated, “Report Finished” displays in the window/tab and a separate browser window opens with the Sample Custom Report in the PDF format.

2. From the open PDF file, the Sample Custom Report can be exported in some of the following ways:

- print the report - click the print  icon to open the Print dialog box, and proceed with standard print procedures.
  - save the report - click the save  icon to open the Save a Copy dialog box, and proceed with standard save procedures.
3. Click the “X” in the upper right corner of the report window to close it.

## Report Format

---

For each report, the header of the reports contain the following information:

- **Sort Order: Page Count, descending**
- **From: / To:** today’s date displays
- the name of the report displays

The footer of the reports contain the following information:

- today’s date (MM/DD/YYYY) and time (HH:MM:SS AM/PM) the report was generated
- **Page** number
- **Filter: None**
- **Generated by:** manager’s login ID

## Top 20 Categories by Page Count

The name of the report (Categories) displays in the header.

The body of the report contains the following columns: list of the top 20 Categories and corresponding IP Count, User Count, Site Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The Grand Total and Count display at the end of the report.

Enterprise Reporter		Dec 30, 2009 - Dec 30, 2009						M86 SECURITY	
Sort Order: Page Count, descending		Categories							
Categories	IP Count	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
MSNMG	62	475	248	3,594	670	6:30:20	4,270	0	
Search Engines	131	1,417	13	2,508	1,778	3:5:50	4,244	0	
Banner/Pop Ads	82	512	43	610	1,552	1:4:40	2,162	0	
Information Technology	64	439	29	594	1,333	0:51:20	1,827	0	
Web Based Email	45	376	12	525	479	1:5:10	999	0	
Chat	30	235	7	408	16	0:58:40	434	0	
Shopping	16	119	15	256	261	0:24:50	517	0	
General Business	56	443	25	213	3,633	0:28:0	3,736	0	
Internet Radio	11	86	5	124	192	0:10:30	316	0	
Entertainment	17	123	14	121	465	0:12:0	566	0	
Travel	11	59	11	110	1,310	0:8:40	1,420	0	
News	32	194	28	92	1,224	0:10:20	1,318	0	
R Rated	3	33	2	86	0	0:10:0	86	0	
Pornography/Adult Content	7	69	10	71	411	0:10:20	482	0	
Vehicles	3	25	3	64	222	0:3:10	296	0	
Online Greeting Cards	2	17	2	64	1,213	0:4:50	1,277	0	
Gambling	1	11	1	58	8	0:8:30	66	0	
Games	6	48	5	57	67	0:5:50	124	0	
Online Auction	7	44	6	56	355	0:9:20	481	0	
Dating/Personals	13	84	5	45	542	0:4:50	587	0	
Financial Institution	17	91	8	41	338	0:5:20	379	0	
Message Boards	3	24	2	38	81	0:2:30	119	0	
Recreation	5	28	5	36	254	0:4:18	290	0	
Web Logs/Personal Pages	5	37	3	35	52	0+0	87	0	
Sports	4	34	4	73	77	0:3:50	92	0	
Government	4	27	4	21	509	0:2:20	529	0	
Movies & Television	8	35	7	19	32	0:3:10	51	0	
Internet Service Provider	3	15	1	18	0	0:0	18	0	
TESTING	4	24	1	17	51	0:2:50	68	0	
Generic Streaming Media	9	38	6	14	394	0:2:20	399	0	
Image Servers & Image Search Engines	3	29	3	14	84	0:1:10	96	0	
Social Opinion	4	20	2	14	221	0:2:0	235	0	
Weather/Traffic	2	9	2	14	180	0:1:18	194	0	
Portals	13	62	4	13	613	0:0	526	0	

12/31/2009 10:33:21 AM Generated by: manager Filter: None Page 1 of 2

Fig. 3:6-10 Sample Categories report

## Top 20 IPs by Category/IP

The name of the report (Category/IPs: Top 20 IPs by Page Count) displays in the header.

The body of the report contains the following information for each Category listed: columns showing the top 20 user IPs and corresponding User Count, Site Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total and IP Count display at the end of each Category section.

The Grand Total and Category Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009				M86 SECURITY		
Sort Order: Page Count, descending		Category/IPs						
		Top 20 IPs by Page Count						
Category:Uncategorized								
IPs	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
192.168.80.80	1	16	961	278	0:30:54	1,237	0	
192.168.30.82	1	26	855	227	0:19:0	1,002	0	
208.90.237.42	2	7	791	211	0:20:24	1,002	0	
208.90.239.80	1	1	742	0	0:2:24	742	0	
208.90.239.118	1	1	738	0	0:0:18	738	0	
208.90.237.244	1	3	725	0	0:0:32	725	0	
208.90.239.3	1	1	704	0	0:5:24	704	0	
192.168.30.06	1	11	675	24	0:34:22	699	0	
192.168.30.87	1	30	238	87	0:10:24	293	0	
208.90.237.60	1	4	143	1	0:2:28	144	0	
192.168.102.118	1	23	139	112	0:8:4	251	0	
208.90.237.101	1	17	125	483	0:0:24	608	0	
192.168.30.84	1	10	97	2	0:8:4	99	0	
208.90.237.15	1	25	95	107	0:15:36	232	0	
208.90.239.84	2	0	93	322	0:3:4	468	0	
208.90.239.37	1	20	88	75	0:2:20	183	0	
208.90.237.47	1	13	75	459	0:1:44	533	0	
208.90.239.17	2	10	69	95	0:1:24	134	0	
208.90.237.50	1	20	56	116	0:3:30	172	0	
208.90.237.8	1	16	56	90	0:2:48	148	0	
Total for Uncategorized								
IP Count: 20 sorted by Page Count, descending	33	279	7,460	2,877	3:43:48	10,137	0	
Category:Peer-to-peer/File Sharing								
IPs	User Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
208.90.239.80	1	1	362	6,267	16	6:02:32	6,333	0
208.90.239.37	1	1	4	0	0:0:15	4	0	
12/31/2009 2:46:44 PM Generated by: manager Filter: None Page 1 of 40								

Fig. 3:6-11 Sample Category/IPs report

## Top 20 Users by Category/User

The name of the report (Category/Users: Top 20 Users by Page Count) displays in the header.

The body of the report contains the following information for each Category listed: columns showing the top 20 Users (usernames/username paths) and corresponding IP Count, Site Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total and User Count display at the end of each Category section.

The Grand Total and Category Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec: 04, 2009		M86 SECURITY				
Sort Order: Page Count, descending		Category/Users		Top 20 Users by Page Count				
Category: Unategorized								
Users	IP Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
192.168.30.80	1	15	991	278	0:36:24	1,237	0	
192.168.30.82	1	28	955	227	0:19:19	1,082	0	
LOGO/Marketing/edavid	1	7	780	200	0:52:16	908	0	
208.90.239.50	1	1	742	0	0:7:24	742	0	
208.90.239.115	1	1	736	0	0:8:19	736	0	
208.90.237.244	1	3	725	0	0:5:32	725	0	
208.90.239.3	1	1	704	0	0:5:24	704	0	
192.168.30.85	1	11	675	24	0:34:32	866	0	
192.168.30.87	1	39	230	57	0:10:34	293	0	
LOGO/Sales/brooks	1	4	143	1	0:2:28	144	0	
News020211/NDV/IDUAL/USER03_CA_USA_ch	1	23	139	112	0:9:4	251	0	
208.90.237.101	1	17	125	483	0:8:24	809	0	
192.168.30.84	1	10	97	2	0:6:4	99	0	
208.90.237.15	1	25	85	187	0:5:24	262	0	
LOGO/Programmer/fengtai	1	20	88	75	0:2:20	163	0	
LOGO/Administrator/miller	1	13	75	450	0:1:44	533	0	
LOGO/INDIVIDUAL/username	1	10	67	60	0:1:20	133	0	
208.90.239.84	1	8	62	214	0:1:40	276	0	
208.90.237.8	1	15	56	90	0:2:48	146	0	
LOGO/DEFAULT/username	1	28	50	110	0:3:30	172	0	
Total for Unategorized		20	278	7,426	2,517	3,42:12	9,943	0
User Count: 20 sorted by Page Count, descending								
Category: Peer-to-peer/File Sharing								
Users	IP Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
208.90.238.60	1	352	6,297	16	5:22:32	6,313	0	
12/31/2009 2:49:55 PM		Generated by: manager		Filter: None		Page 1 of 50		

Fig. 3-6-12 Sample Category/Users report



## Top 20 Users by Page Count

The name of the report (Users) displays in the header.

The body of the report contains columns with the following information for the top 20 Users: usernames/username paths and corresponding Category Count, IP Count, Site Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The Grand Total and user Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009		M86 SECURITY					
Sort Order: Page Count, descending									
Users									
Users	Category Count	IP Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
208.90.238.60	23	1	421	6,788	794	6:37:44	7,542	0	
LOOO\Sales\Deford	34	1	139	2,362	4,472	1:51:09	6,804	0	
LOOO\Sales\Towers	20	1	71	2,174	1,266	1:52:19	3,573	0	
192.168.30.80	28	1	143	1,917	2,360	1:23:10	4,277	1,125	
208.90.237.10	30	1	132	1,883	1,427	1:49:12	3,310	0	
LOOO\DEFAULT\Toussaint,clerk	31	1	103	1,537	2,053	1:44:30	3,640	2	
LOOO\Sales\Hunt	19	2	83	1,561	595	0:55:16	2,177	0	
LOOO\Marketing\edavid	23	1	93	1,549	1,739	1:32:16	3,258	1	
LOOO\Sales\jehua\jehua@face	17	1	66	1,481	277	1:14:24	1,758	0	
208.90.237.17	33	1	114	1,374	1,447	0:55:12	2,821	43	
208.90.237.101	36	1	149	1,329	2,333	1:12:20	3,662	33	
LOOO\Marketing\mbath	25	1	119	1,296	1,723	0:25:40	3,021	0	
208.90.238.31	34	1	136	1,278	3,207	0:48:44	4,485	0	
208.90.238.19	25	1	80	1,240	882	1:8:48	2,122	0	
LOOO\Sales\pouah	29	1	70	1,240	840	1:8:4	2,080	0	
LOOO\INDIVIDUAL\Ho	15	1	41	1,231	130	1:0:0	1,361	0	
Novell\2007\INDIVIDUAL\USERS_CA_US	27	1	140	1,218	2,550	0:51:04	3,768	0	
A_rhoo									
LOOO\Sales\Kordosky	15	1	35	1,171	508	1:0:44	1,679	1	
192.168.30.80	17	1	84	1,115	1,429	0:30:40	2,544	0	
192.168.30.80	16	1	38	1,082	460	0:42:20	1,542	0	
Grand Total	406	21	2,316	34,028	30,836	27:16:82	66,464	1,238	
Count: 20									

12/31/2009 2:56:55 PM Generated by: manager Filter: None Page 1 of 1

Fig. 3:6-13 Sample Users report

## Top 20 Categories by User/Category

The name of the report (Users/Categories: Top 20 Categories by Page Count) displays in the header.

The body of the report contains columns with the following information for each User listed: top 20 Categories and corresponding IP Count, Site Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The user Total and Category Count display at the end of each User section.

The Grand Total and User Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009				M86 SECURITY	
Sort Order: Page Count, descending		User/Categories					
User: 208.90.238.60		Top 20 Categories by Page Count					
Categories	IP Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hits Count	Blocked Hits
Peer-to-peer/File Sharing	1	352	6,287	10	5:22:32	6,313	0
Flash Video	1	15	170	0	0:20	170	0
Financial Institution	1	5	57	7	0:156	64	0
Online Trading/Investment	1	2	47	56	0:14	103	0
Banner/Web Ads	1	11	38	80	0:148	118	0
General Business	1	8	37	2	0:130	39	0
Search Engines	1	8	25	127	0:10	152	0
Music	1	2	24	68	0:14	82	0
Entertainment	1	2	18	208	0:82	220	0
Image Servers & Image Search Engines	1	2	18	1	0:40	18	0
Web Based Email	1	1	10	2	0:20	17	0
Information Technology	1	9	12	13	0:48	25	0
Yahoo! Mail	1	2	7	2	0:24	9	0
Web Hosts	1	2	7	0	0:12	7	0
Intranet/Internal Servers	1	1	6	0	0:24	6	0
Uncategorized	1	6	10	10	0:24	16	0
Shopping	1	1	5	0	0:20	5	0
Edge Content Servers/Infrastructure	1	4	2	37	0:8	39	0
Free Hosts	1	1	2	0	0:8	2	0
Recreation	1	1	1	0	0:4	1	0
Total for 208.90.238.60	20	435	6,788	616	5:37:44	7,404	0
Category Count: 20 sorted by Page Count, descending							
User: LOGON\Sales@deloid							
Categories	IP Count	Site Count	Page Count	Object Count	Time (HH:MM:SS)	Hits Count	Blocked Hits
Yahoo! Mail	1	2	922	0	0:50:30	922	0
Search Engines	1	9	448	274	0:10:26	722	0
12/31/2009 3:10:20 PM Generated by: manager Filter: None Page 1 of 75							

Fig. 3:6-14 Sample User/Categories report

## Top 20 Sites by User/Site

The name of the report (User/Sites: Top 20 Sites by Page Count) displays in the header.

The body of the report contains columns with the following information for each User listed: top 20 Sites and corresponding Category Count, IP Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The user Total and Site Count display at the end of each User section.

The Grand Total and User Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009		M86 SECURITY				
Sort Order: Page Count, descending		User/Sites						
		Top 20 Sites by Page Count						
User: 208.90.238.60								
Sites	Category Count	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
digitalhive.org	2	1	422	91	0:59	479	0	
205.214.62.77	1	1	421	0	0:20:16	421	0	
75.47.114.65	1	1	223	0	0:2:52	223	0	
188.126.04.03	1	1	166	0	0:7:36	166	0	
78.82.203.131	1	1	138	0	0:6:40	138	0	
218.246.122.225	1	1	129	0	0:6:12	129	0	
82.85.85.27	1	1	125	0	0:8:20	125	0	
82.166.38.36	1	1	125	0	0:7:34	125	0	
69.155.113.134	1	1	99	0	0:3:20	99	0	
70.82.79.151	1	1	93	0	0:6:12	93	0	
122.162.90.18	1	1	89	0	0:4:20	89	0	
88.148.65.58	1	1	88	0	0:6:12	88	0	
77.109.72.221	1	1	87	0	0:5:44	87	0	
68.95.249.9	1	1	82	0	0:6:12	82	0	
94.23.42.170	1	1	81	0	0:2:8	81	0	
215.68.88.240	1	1	81	0	0:2:52	81	0	
91.121.151.193	1	1	80	0	0:2:59	80	0	
212.117.166.123	1	1	80	0	0:3:9	80	0	
yahoo.com	7	1	74	32	0:2:40	106	0	
ameritrade.com	2	1	68	0	0:1:44	68	0	
Total for 208.90.238.60		28	20	2,746	83	1,42:48	2,829	0
Site Count: 20 sorted by Page Count, descending								
User: LOGO\Sales\delrod								
Sites	Category Count	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits	
88.180.217.13	1	1	914	0	0:58:12	914	0	
google.com	5	1	393	101	0:9:52	494	0	
12/31/2009 3:15:41 PM		Generated by: manager		Filter: None		Page 1 of 83		

Fig. 3.6-15 Sample User/Sites report

## By User/Category/Site

The name of the report (User/Category/Sites) displays in the header.

The body of the report contains columns with the following information for each User and Category listed: Sites and corresponding IP Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total and Site Count display at the end of each User/Category section.

The Grand Total and User Count display at the end of the report.

Enterprise Reporter						
User/Category/Sites						MB6 SECURITY
Sort Order: Page Count, descending						
User: 208.90.238.60						
Category: Banner/Web Ads						
Sites	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
yieldmanager.com	1	19	0	0:0:22	19	0
atdmt.com	1	8	13	0:0:20	21	0
doubleclick.net	1	5	24	0:0:16	29	0
admix.com	1	3	0	0:0:8	3	0
trafficamp.com	1	2	0	0:0:8	2	0
advertising.com	1	1	1	0:0:4	2	0
2mdn.net	1	0	11	0:0:0	11	0
max.com	1	0	0	0:0:0	0	0
unicast.com	1	0	5	0:0:0	5	0
reput.com	1	0	17	0:0:0	17	0
adbrn.com	1	0	1	0:0:0	1	0
<b>Total for Banner/Web Ads</b>						
Site Count: 11 sorted by Page Count, descending						
User: 208.90.238.60						
Category: Dating/Personals						
Sites	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
match.com	1	0	133	0:0:0	133	0
<b>Total for Dating/Personals</b>						
Site Count: 1 sorted by Page Count, descending						
User: 208.90.238.60						
Category: Edge Content Servers/Infrastructure						
12/31/2009 3:18:15 PM Generated by: manager Filter: None Page 1 of 537						

Fig. 3:6-16 Sample User/Category/Sites report

## Top 20 Sites by Category/Site

The name of the report (Category/Sites: Top 20 Sites by Page Count) displays in the header.

The body of the report contains columns with the following information for each Category listed: Sites and corresponding IP Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total and Site Count display at the end of each Category section.

The Grand Total and Category Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009		M86 SECURITY			
Sort Order: Page Count, descending		Category/Sites		Top 20 Sites by Page Count			
Category:Uncategorized							
Sites	IP Count	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
8e6.net	15	15	3,041	0	0:37:44	3,041	0
208.00.238.136	5	5	803	0	0:52:56	803	0
sementon.org	1	1	580	0	0:38:20	580	0
192.168.201.121	1	1	481	87	0:59:56	568	0
192.168.20.90	2	2	433	256	0:6:18	689	0
192.168.20.220	2	2	310	22	0:4:52	332	0
8e6.com	5	5	254	0	0:19:24	254	0
60.248.169.141	1	1	241	23	0:6:24	264	0
x-space.info	1	2	208	0	0:13:52	208	0
216.246.122.102	2	2	126	0	0:1:56	126	0
192.168.20.217	1	1	79	7	0:4:9	86	0
frjan.com	2	2	76	0	0:4:4	76	0
216.246.122.93	3	3	73	0	0:0:48	73	0
199.203.243.203	3	3	64	323	0:3:12	387	0
205.188.66.157	1	2	58	384	0:2:12	422	0
216.246.122.101	1	1	57	0	0:0:40	57	0
216.52.233.225	1	1	54	0	0:3:36	54	0
216.246.122.108	2	2	42	0	0:0:24	42	0
hr-coachonline.com	1	1	41	0	0:0:8	41	0
68.142.207.36	1	1	40	0	0:0:40	40	0
Total for Uncategorized	51	53	7,061	1,082	3:39:24	8,143	0
Site Count: 20 sorted by Page Count, descending							
Category:Peer-to-peer/File Sharing							
Sites	IP Count	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
203.214.62.77	1	1	421	0	0:20:16	421	0
digitalhive.org	1	1	416	16	0:4:44	432	0
12/31/2009 3:19:18 PM Generated by: manager Filter: None Page 1 of 48							

Fig. 3-6-17 Sample Category/Sites report

## By Category/Site/IP

The name of the report (Category/Site/IPs) displays in the header.

The body of the report contains columns with the following information for each Category and Site listed: IPs and corresponding User Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total for each site and IP Count display at the end of each Category/Site section.

The Grand Total and Category Count display at the end of the report.

Enterprise Reporter							Dec 04, 2009 - Dec 04, 2009	M86 SECURITY
Sort Order: Page Count, descending							Category/Site/IPs	
Category:Uncategorized							Site: 1105govinfoevents.com	
IPs	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits		
208.60.237.15	1	0	19	0:03	19	0		
Total for 1105govinfoevents.com							1	0
IP Count: 1 sorted by Page Count, descending								
Category:Uncategorized							Site: 110.178.12.4	
IPs	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits		
208.60.239.37	1	11	0	0:15	11	0		
Total for 110.178.12.4							1	11
IP Count: 1 sorted by Page Count, descending								
Category:Uncategorized							Site: 123.129.242.168	
IPs	User Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits		
208.60.239.37	1	3	0	0:4	3	0		
Total for 123.129.242.168							1	3
IP Count: 1 sorted by Page Count, descending								
Category:Uncategorized								
12/31/2009 3:20:07 PM							Generated by: manager	Filter: None
							Page 1 of 13	

Fig. 3.6-18 Sample Category/Site/IPs report

## By Category/User/Site

The name of the report (Category/User/Sites) displays in the header.

The body of the report contains columns with the following information for each Category and User listed: Sites and corresponding IP Count, Page Count, Object Count, Time (HH:MM:SS), Hit Count, and Blocked Hits.

The category Total for each user and Site Count display at the end of each Category/User section.

The Grand Total and Category Count display at the end of the report.

Enterprise Reporter		Dec 04, 2009 - Dec 04, 2009		M86 SECURITY		
Sort Order: Page Count, descending		Category/User/Sites				
Category:Uncategorized						
User:192.168.30.74						
Sites	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
66.66.27.220	1	1	0	0:0:4	1	0
65.55.25.00	1	1	0	0:0:4	1	0
Total for 192.168.30.74						
Site Count: 2 sorted by Page Count, descending						
Category:Uncategorized						
User:192.168.30.60						
Sites	IP Count	Page Count	Object Count	Time (HH:MM:SS)	Hit Count	Blocked Hits
192.168.20.90	1	406	143	0:0:32	551	0
208.90.234.134	1	286	0	0:24:00	366	0
192.168.20.220	1	90	5	0:1:24	95	0
860.com	1	58	0	0:3:48	58	0
208.90.239.60	1	15	17	0:0:20	32	0
65.245.209.62	1	9	0	0:0:4	9	0
bonobonohotel.com	1	6	73	0:0:0	79	0
65.55.73.248	1	2	0	0:0:0	2	0
psnetmedical.com	1	2	38	0:0:0	42	0
63.245.200.81	1	1	0	0:0:4	1	0
qvz2d.com	1	1	0	0:0:4	1	0
65.55.194.20	1	1	0	0:0:4	1	0
207.46.14.233	1	1	0	0:0:4	1	0
65.55.21.250	1	1	0	0:0:4	1	0
65.245.209.105	1	1	0	0:0:4	1	0
Total for 192.168.30.60						
Site Count: 15 sorted by Page Count, descending						
Category:Uncategorized						
12/31/2009 3:23:49 PM Generated by: manager Filter: None Page 1 of 634						

Fig. 3.6-19 Sample Category/User/Sites report

## Wall Clock Time Report

The Wall Clock Time Report option is accessible by administrators only and provides textual results of end user Internet usage activity for a specified time period, based on the Wall Clock Time algorithm (see Wall Clock Time algorithm in this sub-section). This algorithm calculates the amount of time an end user spent accessing a given page or object—disregarding the number of seconds from each hit and counting each unique minute of Web time as one minute. Using this algorithm, an end user could never have more than 24 hours of Web time within a given 24-hour period.



**NOTE:** *The Wall Clock Time Report option does not display if the Wall Clock Time feature is disabled in the ER Administrator user interface. Refer to the Optional Features screen sub-section of the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for information about enabling or disabling the Wall Clock Time feature.*



## Generate a Wall Clock Time Report

For administrators, the Wall Clock Time Report window displays in the panel when Wall Clock Time Report is clicked in the Custom Reports menu:

Fig. 3.6-20 Wall Clock Time Report window (administrator)

To generate a Wall Clock Time report:

1. In the Criteria frame, specify the type of report to be generated by clicking the radio button corresponding to that option, and—if necessary—making entries/selections in pertinent fields:
  - **Show all records** - if choosing this option, the Date Scope field displays “Yesterday” and yesterday’s date.
  - **Show User Group** - if choosing this option, select the user group from the pull-down menu to the right. The Date Scope field displays “Yesterday” and yesterday’s date.

- **Show Specific User** - if choosing this option, enter the username—or a portion of the username with the ‘%’ wildcard—in the text box to the right, and then make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
  - **Show Specific IP** - if choosing this option, enter the IP address—or a portion of the IP address with the ‘%’ wildcard—in the text box to the right, and then make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
  - **Top 20 Users by Wall Clock Time** - if choosing this option, make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
2. Click **Create Report** to open a separate ER Report browser window containing the status of the report being generated. When completely generated, “Report Finished” displays, and the report view in PDF format opens in a separate window.

As with other Web Client reports exported in the PDF format, this report can be saved and/or printed.





**NOTES:** *If there is no data available—or if data is available for only a partial number of days within the date scope range—a message displays indicating that no records are available.*

*If a new user group with existing usernames or IP addresses was added, data for that user group will not be available for viewing on the current day. Data for the following viewing options are available according to this schedule:*

- *Yesterday, Week to Yesterday, and Month to Yesterday - available by the next day*
- *Last Week - available by the next Sunday*
- *Last Month - available by the first of next month.*

*If a new user group with new users was added, by the next day only the “Yesterday” viewing option will contain data available for viewing. All other viewing options will not be available until the full length of time indicated by the viewing option has transpired.*

3. From the open PDF file, the Wall Clock Time report can be exported in some of the following ways:
  - print the report - click the print  icon to open the Print dialog box, and proceed with standard print procedures.
  - save the report - click the save  icon to open the Save a Copy dialog box, and proceed with standard save procedures.
4. Click the “X” in the upper right corner of both the ER Report window and the PDF report window to close these windows.

## View the Wall Clock Time Report

The header of the generated Wall Clock Time report includes the date range, Report Type, and Details criteria.

The body of the report includes the end user NAME, WALL CLOCK time totals in days, hours, and minutes, and any other relative criteria, such as username path or IP address.

The Total Records displays at the end of each section.

The footer of the report includes the Date and Time the report was generated, and Page number.

The Total Time for this Date Scope in days, hours, and minutes displays at the end of the report.

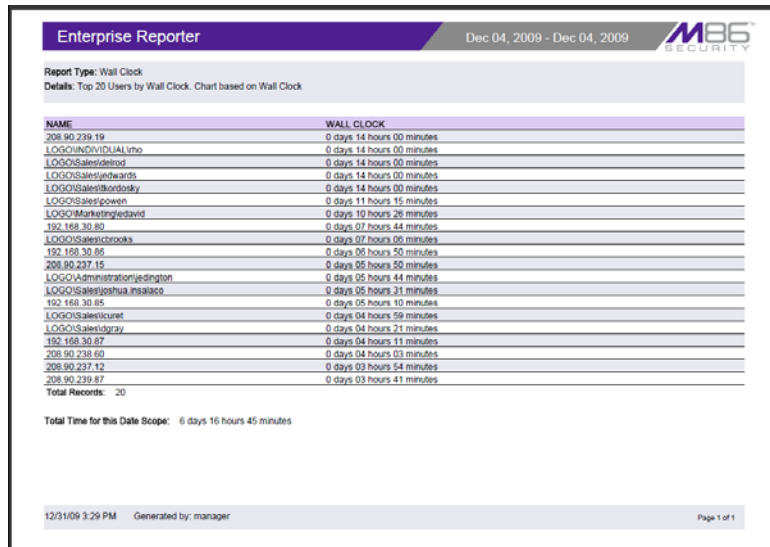


Fig. 3:6-21 Sample Wall Clock Time Report for Top 20 Users

## Wall Clock Time algorithm

---

For each end user included in the report, the number of seconds from the log is dropped, and each unique minute within a given hour counts as one minute.

In the following example, the end user shows a total of seven minutes of Wall Clock Time:

12:00:01	www.m86security.com
12:00:10	www.abc.com
12:01:00	www.m86security.com
12:02:04	www.whitepages.com
12:05:58	www.yellowpages.com
12:05:58	www.yellowpages.com/714.jsp
12:05:59	www.yellowpages.com/phone_number.gif
12:07:03	www.google.com
12:07:33	www.yahoo.com
12:08:23	www.news.com
12:08:30	www.usatoday.com
12:08:59	www.usatoday.com/usa.gif
12:09:00	www.usatoday.com/ca.gif
12:09:01	www.yahoo.com
12:09:02	http://200.100.10.65:88
12:09:03	www.abc.com
12:09:04	www.nbc.com

The total for this end user is based on a nine-minute time span that includes 17 entries in the log, and seven unique minute entries: 00, 01, 02, 05, 07, 08, and 09.

## Use wildcards in a Specific Search query

To generate a report for a specific username or user IP, enter the minimum criteria:

1. Select “Show Specific User” or “Show Specific IP”.
2. Enter text in the following format: %X% (in which “X” represents the username or the user’s IP address).

### Examples:

- Show Specific User: %jsmith%
  - Show Specific IP: %200.10.100.51%
3. Click **Create Report** to open the specific search page:



Fig. 3:6-22 Specific search page box showing username results

This page is comprised of a list box containing usernames or user IPs stored in the system—pertinent to your query—returned by the search.

4. Make a selection from the list box, and then click **OK** to close the page and to begin generating the report.

## Blocked Request Report

The Blocked Request Report option is accessible by administrators only and provides textual results of end user Internet usage activity of blocked URLs for a specified time period.



**NOTE:** The Blocked Request Report option does not display if the Block Request Count feature is disabled in the ER Administrator user interface. Refer to the Optional Features screen sub-section of the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide for information about enabling or disabling the Block Request Count feature.

## Generate a Blocked Request Report

For administrators, the Blocked Request Report window displays in the panel when Blocked Request Report is clicked in the Custom Reports menu:

Fig. 3:6-23 Blocked Request Report window (administrator)

To generate a Blocked Request Report:

1. In the Criteria frame, specify the type of report to be generated by clicking the radio button corresponding to that option, and—if necessary—making entries/selections in pertinent fields:
  - **Show all records** - if choosing this option, the Date Scope field displays “Yesterday” and yesterday’s date.
  - **Show User Group** - if choosing this option, select the user group from the pull-down menu to the right. The Date Scope field displays “Yesterday” and yesterday’s date.
  - **Show Specific User** - if choosing this option, enter the username—or a portion of the username with the ‘%’ wildcard—in the text box to the right, and then make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
  - **Show Specific IP** - if choosing this option, enter the IP address—or a portion of the IP address with the ‘%’ wildcard—in the text box to the right, and then make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
  - **Top 20 Users by Blocked Request** - if choosing this option, make a selection from the **Date Scope** field to display the date range for that time period: Yesterday, Last Week, Last Month, Week to Yesterday, Month to Yesterday.
2. Click **Create Report** to open a separate ER Report browser window containing the status of the report being generated. When completely generated, “Report Finished” displays, and the report view in PDF format opens in a separate window.

As with other Web Client reports exported in the PDF format, this report can be saved and/or printed.







**NOTES:** *If there is no data available—or if data is available for only a partial number of days within the date scope range—a message displays indicating that no records are available.*

*If a new user group with existing usernames or IP addresses was added, data for that user group will not be available for viewing on the current day. Data for the following viewing options are available according to this schedule:*

- *Yesterday, Week to Yesterday, and Month to Yesterday - available by the next day*
- *Last Week - available by the next Sunday*
- *Last Month - available by the first of next month.*

*If a new user group with new users was added, by the next day only the “Yesterday” viewing option will contain data available for viewing. All other viewing options will not be available until the full length of time indicated by the viewing option has transpired.*

3. From the open PDF file, the Blocked Request Report can be exported in some of the following ways:

- print the report - click the print  icon to open the Print dialog box, and proceed with standard print procedures.
  - save the report - click the save  icon to open the Save a Copy dialog box, and proceed with standard save procedures.
4. Click the “X” in the upper right corner of both the ER Report window and the PDF report window to close these windows.

## View the Blocked Request Report

The header of the generated Blocked Request Report includes the date range, Report Type, and criteria Details.

‘RESULTS FOR: the date’ displays above the NAME column header if the report criteria is other than “Top 20 Users by Blocked Request”.

In the body of the report, rows of records display beneath the following column headers: end user NAME, IP address (if the report criteria is other than “Top 20 Users by Blocked Request”), and Blocked Count quantity.

If the report was generated for any criteria other than “Top 20 Users by Blocked Request”, the Total for Day count displays beneath each section.

The footer of the report includes the Date and Time the report was generated, and Page number.

The Total Count for all blocked requests displays at the end of the report.

NAME	Blocked Count
192.168.30.85	1128
208.90.238.33	121
208.90.237.8	109
208.90.237.17	43
208.90.237.101	33
208.90.237.15	30
208.90.237.244	28
208.90.738.30	20
208.90.238.50	19
208.90.238.3	18
208.90.239.115	16
208.90.739.24	16
208.90.237.245	8
208.90.237.245	8
208.90.239.120	8
208.90.739.34	8
208.90.239.62	8
208.90.239.63	8
208.90.239.68	8
208.90.237.195	3
<b>Total Records:</b> 20	
<b>Total Count:</b> 1637	

12/31/09 3:30 PM Generated by: manager Page 1 of 1

Fig. 3:6-24 Blocked Request Report for Top 20 Users



**NOTE:** To use wildcards in a Blocked Request Report query, see *Use Wildcards in a Specific Search query from the Wall Clock Time Report sub-section.*

## Saved Custom Reports

The Saved Custom Reports option lets you view, copy, or edit data in a report you created, run a report, or delete a report.

This window displays in the panel when Saved Custom Reports is selected from the Custom Reports menu:

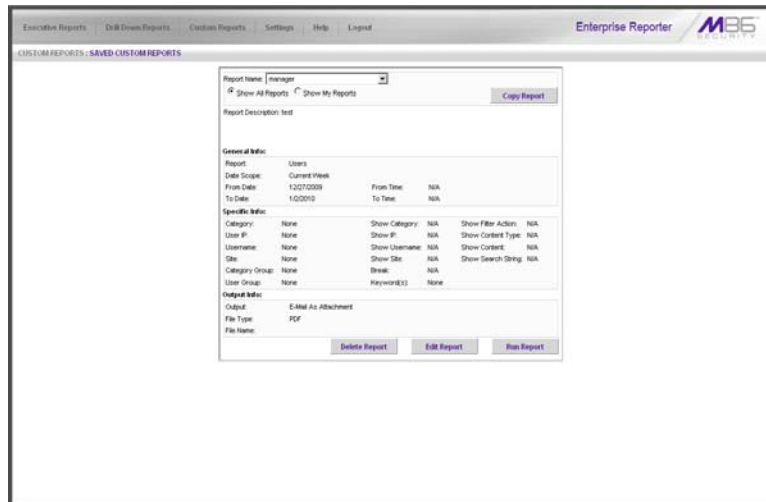


Fig. 3:6-25 Saved Custom Reports window (administrator)



**NOTE:** The radio button options in the top frame do not display for sub-administrators.

## View Information in a Saved Custom Report

In the top frame, all report selections display in the Report Name pull-down menu.

If you are logged in as an administrator:

1. Click the radio button corresponding to either option:
  - **Show All Reports** - This selection displays in the Report Name pull-down menu a list of all recorded reports
  - **Show My Reports** - This selection displays in the Report Name pull-down menu only the reports you recorded



**NOTE:** *The radio button options do not display for sub-administrators.*

2. Make a selection from the **Report Name** pull-down menu to display the Report Description below this frame, and to populate the General Info, Specific Info, and Output Info frames:
  - **General Info:** Report type; Date Scope; From/To Date; From/To Time (if available)
  - **Specific Info:** Category, User IP, Username, Site, Category Group, User Group, Show Category, Show IP, Show Username, Show Site, Show Filter Action, Show Content Type, Show Content, Show Search String, Break type, Keyword(s)
  - **Output Info:** Output format, File Type, File Name

## Edit a Custom Report

The Save Report pop-up window is used when editing a summary or detail report.

1. Click **Edit Report** to open the Save Report pop-up window where you can edit report settings for a saved report.

When editing a summary report, the Save Report pop-up window appears as follows:

**Save Report**

Save Name:

Description:

Date Scope:

From Date:  From Time:

To Date:  To Time:

Break type:

Output type:

Format:

**For single-break reports only**

Amount shown:  # Records:

**For pie and bar charts only**

Generate using:

**For E-Mail output only**

To:

Cc:

Bcc:

Subject:

Body:

Fig. 3:6-26 Save Report, edit summary report

When editing a detail report, the Save Report pop-up window appears as follows:

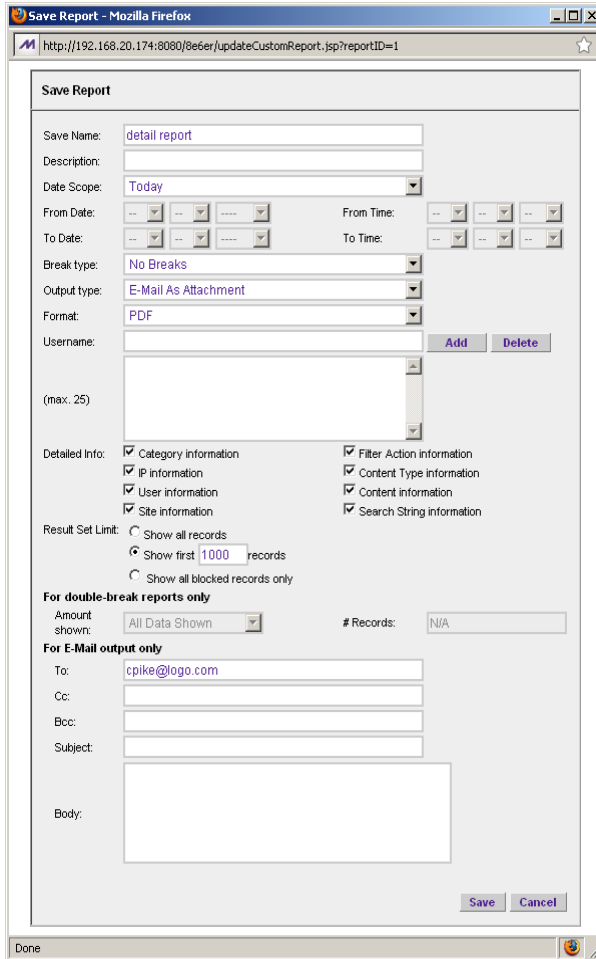




Fig. 3:6-27 Save Report, edit detail report

 **NOTE:** When editing a report, the Hide Un-Identified IPs field does not display if this option is deselected in Default Options.

 **TIPS:** The Copy (Ctrl+C) and Paste (Ctrl+V) functions can be used in the fields in the Save Report pop-up window.

*When editing a summary or detail report, click **Cancel** to exit the **Save Report pop-up window** without saving your edits.*

2. After making your selections and entries, click **Save**.

## Add a Username

---

1. In the **Username** field of a summary or detail report, do one of the following to add a username in the list box below:
  - Type in the username
  - Enter valid alpha characters preceded and/or followed by a wildcard ('%'), or
  - Enter a wildcard ('%')
2. Click **Add**; if a wildcard was used and more than one match was found on the server, this action opens the **Specific Search pop-up box** (see Fig. 3:6-8) that displays all available matches in the **Username** frame:
  - a. For a summary report, select the username from the pop-up box. For a detail report, select up to 25 usernames from the pop-up box.
  - b. Click **OK** to close the pop-up box and to populate the list box in the wizard screen.



**TIP:** To remove an entry from the list box, select it and then click **Delete**.

## Copy a Custom Report

---

The copy feature is a great time saver, letting you use settings from a saved summary or detail report.

1. From the **Report Name** pull-down menu, select the report to be copied.
2. Click **Copy Report** to open the Copy Custom Report pop-up window where you make modifications for the new report.

See Edit a Custom Report for information on fields that display in the Copy Custom Report pop-up window.



**NOTE:** *When copying a report:*

- *The Description field displays the text “Copy of ‘X’”, in which ‘X’ represents the report name*
- *The Cancel button does not display*
- *The Hide Un-Identified IPs field does not display if this option is deselected in Default Options*
- *The Username field and accompanying list box do not display*

## Run a Custom Report

---

Click **Run Report** to open a separate browser window that displays information to indicate the report is being generated.

After being completely generated, the report is emailed to the specified recipient(s).



## Delete a Custom Report

To remove the custom report from choices available in the Report Name pull-down menu, and the Event Schedule option:

1. Select the report from the **Report Name** pull-down menu.
2. Click **Delete Report**.



**NOTE:** If a custom report is scheduled to run via the Event Schedule option, deleting the report removes it from the Scheduled Events box.

## Event Schedules

The Event Schedules option is used for maintaining a schedule for generating a customized report.

To view details on a scheduled event, or to edit, add, or delete a scheduled event, click Event Schedule in the Custom Report menu to display the Event Schedules window in the panel:



Name	Interval	Last Run	Next Run	Report Name	Start Time	Creator		
initial report	Daily		01/01/2010 08:00:00 AM	initial report	08:00 AM	manager	Delete	Edit
schedule weekly	Weekly	1/20/2009 01:05:05 AM	01/07/2010 01:05:00 AM	usergroup	01:05 AM	manager	Delete	Edit

NOTE: If you would like your scheduled event to run today, be sure to specify a future Start Time in the Add Event to Schedule menu.

Fig. 3:6-28 Event Schedules window (administrator)

If logged in as the administrator, all scheduled events display. If logged in as a sub-administrator, only the events scheduled by that sub-administrator login ID display. If the Web Client Scheduler is turned off, the message “To view event schedules, please enable Web Client scheduler using ER Admin GUI.” displays in place of scheduled events.



**NOTE:** Refer to these user guide sections for information about the following topics:

- To save reports using the Save Custom Report option, see this chapter and Chapter 5: Drill Down Reports, under the Save Custom Report option sub-sections.
- To enable or disable the Web Client to run scheduled events, see the Web Client Server Management screen sub-section of the M86 ER Administrator User Guide or M86 IR Enterprise Reporter User Guide.

## View Details or Edit a Scheduled Event

---

In the Event Schedules window, events display as rows of records. The following information is included for each record: Name assigned to the scheduled event, Interval when the report is scheduled to run, date Last Run, Report Name, Start Time for the report to run, and Creator of the schedule (login username). Delete and Edit buttons display to the left of each row.

In the Record field at the bottom of the window, the number of the selected record displays, along with the total number of records (scheduled events).

Click the **Refresh** button to refresh the list of records and to scroll to the top of the list.



**TIP:** The selected record is designated by an arrow in the white box to the left of a row. To select another record, click the white box in that row to display the arrow. You also can navigate to another record by using the Record navigation field. Click in the box between the arrow buttons and enter a new record number to go to that record. Or click any of the four arrow buttons to

*advance forward or backward through the list of records. In the order in which they display in the Record field, clicking these buttons moves you to the first record, the record prior to the selected record, the record following the selected record, and the last record.*

## View Details for a Scheduled Event

To view additional information on an event, click the **Edit** button for that event. This action opens the Update Scheduled Event dialog box:

The screenshot shows a web browser window titled "Update Scheduled Event - Mozilla Firefox". The address bar shows a URL starting with "http://192.168.20.218:8080/8e6er/updateSchedules.jsp?schID=". The main content area is a form with the following fields:

- Name:
- Report to Run:
- When to Run:
- Day of the Week:
- Start Time:
- Server Time: 01/04/2010 01:57:26 PM PST


At the bottom right of the form are two buttons: "Cancel" and "Save". The status bar at the bottom of the browser window shows "Done".

Fig. 3:6-29 View event details

The following information displays in this dialog box: Name assigned to the scheduled event; selected Report to Run; interval When to Run the report; Day of the Week the report will run if the report is a daily report, or Day of the Month the report will run if the report is a monthly report, Start Time to run, and Server Time details.

## Edit a Scheduled Event

1. In the Event Schedules window, click the **Edit** button for the event you wish to modify. This action opens the Update Scheduled Event dialog box (see Fig. 3:6-31). In this dialog box you can:
  - change the **Name** of the report
  - make different selections as necessary from the pull-down menus for **Report to Run**, **When to Run**, and/or **Day of the Week** or **Day of the Month**
  - change the **Start Time** for running the report

 **TIP:** Click *Cancel* if you wish to return to the Event Schedules window without saving your edits.

2. Click the **Save** button to display the updated criteria in the Event Schedules window.

## Add an Event to the Schedule

1. In the Event Schedules window, click the **Add Event** button to open the Add Event to Schedule dialog box:

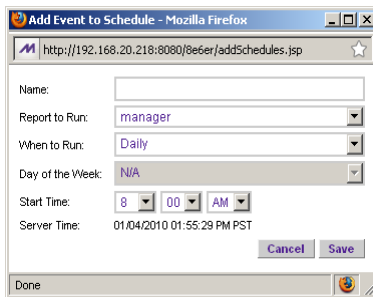


Fig. 3:6-30 Add an event

This dialog box also opens when saving a custom report using the Custom Report Wizard, and selecting the Save and Schedule option.

2. Enter a **Name** for the event.

3. Select the **Report to Run** from the pull-down menu.
4. Select the frequency **When to Run** from the pull-down menu (Daily, Weekly, or Monthly).  
  
If Weekly, specify the **Day of the Week** from the pull-down menu (Sunday - Saturday).  
  
If Monthly, specify the **Day of the Month** from the pull-down menu (1st - 31st).
5. Select the **Start Time** for the report: 1 - 12 for the hour, 00 - 59 for the minute, and AM or PM.



**NOTE:** *The default Start Time is 8:00 AM. If you wish to run a report today and this time has already passed, be sure to select a future time.*



**TIP:** *Click Cancel to return to the Event Schedules window without saving your edits.*

6. Click **Save** to add the scheduled event.

## Delete a Scheduled Event

---

1. In the Event Schedules window, click the **Delete** button for the event you wish to delete. This action opens a dialog box with the message: "Are you sure you want to delete this event?"
2. Click **OK** to execute your action and to close the dialog box. This action also opens an alert box with the message: "Event deleted!"
3. Click **OK** to close the alert box.

## Scheduling a Report to Run

---

Once a report view has been saved, it can be scheduled to run at a designated time.

To schedule a report to run:

1. Go to the Custom Reports menu in the navigation toolbar and select Event Schedule.
2. In the Event Schedules window, click **Add Event**.
3. In the Add Event to Schedule pop-up box, select the Report to Run from the saved custom reports listed in the pull-down menu.
4. Specify criteria for scheduling the event, and then click **Save**.

## Executive Internet Usage Summary

The Executive Internet Usage Summary option is used for specifying email addresses of users authorized to receive bar and line chart reports showing activity in library category groups of your choice.

To set up and maintain a list of library category groups to be included in the report, and the email addresses of intended recipients of this report, click Executive Internet Usage Summary in the Custom Report menu to display the Executive Internet Usage Summary window in the panel:

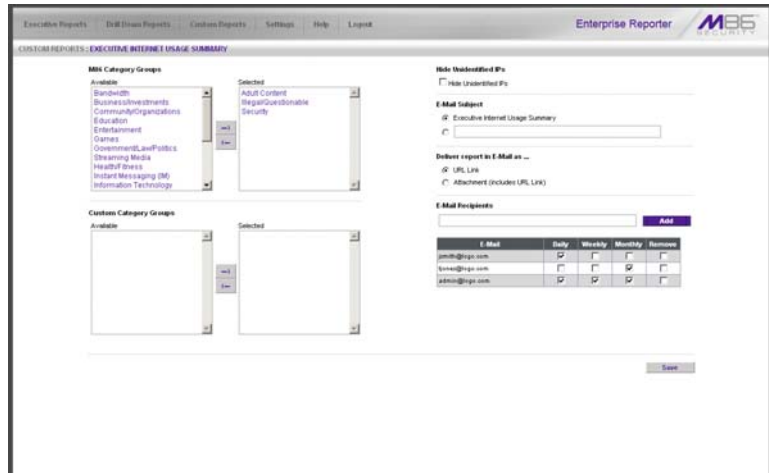


Fig. 3:6-31 Executive Internet Usage Summary window (administrator)

The panel contains the following frames used for configuring and using this feature: M86 Category Groups, Custom Category Groups, Hide Unidentified IPs, E-Mail Subject, Deliver report in E-Mail as..., and E-Mail Recipients.

After making all settings in this window, click the Save button.

## Specify category groups for the report

The M86 Category Groups frame and the Custom Category Groups frame contain the Available and Selected list boxes.

in the M86 Category Groups frame, by default the following library category groups are included in the Selected list box: Adult Content, Illegal/Questionable, and Security.

In the Custom Category Groups frame, by default any library category groups included in the Category Groupings window from the Settings menu display in the Available list box.

### Add category groups to the Selected list box

1. To add category groups to the Selected list box, select the category groups in the Available list box.



**TIP:** Multiple category groups can be selected by clicking each category group while pressing the Ctrl key on your keyboard. Blocks of category groups can be selected by clicking the first category group, and then pressing the Shift key on your keyboard while clicking the last category group.

2. Click the “—>” arrow to move the category groups to the Selected list box.

### Remove category groups from the Selected list box

1. To remove category groups from the Selected list box, select the category groups in the Selected list box.



**TIP:** Multiple category groups can be selected by clicking each category group while pressing the Ctrl key on your keyboard. Blocks of category groups can be selected by clicking the first category group, and then pressing the Shift key on your keyboard while clicking the last category group.

2. Click the “<—” arrow to move the category groups to the Available list box.



## Hide Unidentified IP addresses

---

In the Hide Unidentified IPs frame, by default the **Hide Unidentified IPs** checkbox is deselected. This indicates that activity on machines not assigned to specific users will be included in reports.

If you wish to exclude activity from machines not assigned to specific users, click in the checkbox to enter a check mark.



**NOTE:** *If enabling this feature, the generated report will only hide hit counts for IP addresses in sections of the report labeled “Users.” IP hit counts **will be included** for all other sections of the report, such as those labeled “Categories”, “Category Groups”, etc.*

## Specify E-Mail Subject

---

In the E-Mail Subject frame, by default the **Executive Internet Usage Summary** option is selected, indicating the subject line to be used in the email.

To create a custom subject line for the email, select the radio button to the left of the blank field below, and make an entry in the text box for the subject line to be used in the email.

## Specify how the report will be accessed

---

In the Deliver report in E-Mail as... frame, by default the **Attachment (includes URL Link)** option is selected, indicating the email will include both an attachment of the report and a link to the report.

To specify only a URL link to be included in the email, select the **URL Link** option.

## Maintain a list of users to receive reports

---

In the E-Mail Recipients frame, specify the user(s) to receive the report and the frequency of delivery.

1. Click in the empty field and type in the email address.
2. Click **Add** to clear the field and to add the email address in the list box below.
3. By default, checkmarks populate the frequency checkboxes: **Daily**, **Week**, **Month**. This indicates reports will be emailed to the recipient at the specified intervals.

To change these settings, click the checkbox to remove the selection.

Follow the steps above to add additional recipients.

To remove a recipient from the list of users authorized to receive reports, click the **Remove** checkbox to enter a check mark. After **Save** is clicked, the user will be removed from the E-Mail Recipients frame.

## Save your settings

---

Click **Save** to save all settings made in this window.

## **Sample Executive Internet Usage report**

---

The recipient of the Executive internet Usage Summary report receives an email containing a .pdf attachment of the report (if the size of the .pdf file is within the limits) as well as a link to the report.

Links are available for the following time frame:

- Daily reports (14 days)
- Weekly reports (30 days)
- Monthly reports (90 days)

The header of the generated report includes the title and date range. The footer includes the page number and page range.

The first page includes statistics for the following: Total Web Requests, Total Blocked Requests, Unique IPs/Users.

Total Blocked Requests are given for the following library categories: Malicious Code/Virus, Botnets/Malicious Code Command, Spyware, Bad Reputation Domains, Adult Content, Blended Threats, Phishing, Web-based Proxies/Anonymizers, Hacking.

Bar charts for Top Security Risks (library categories), Top Categories, Top Blocked Users, and Top Users show the top five categories/users and their corresponding total Requests.

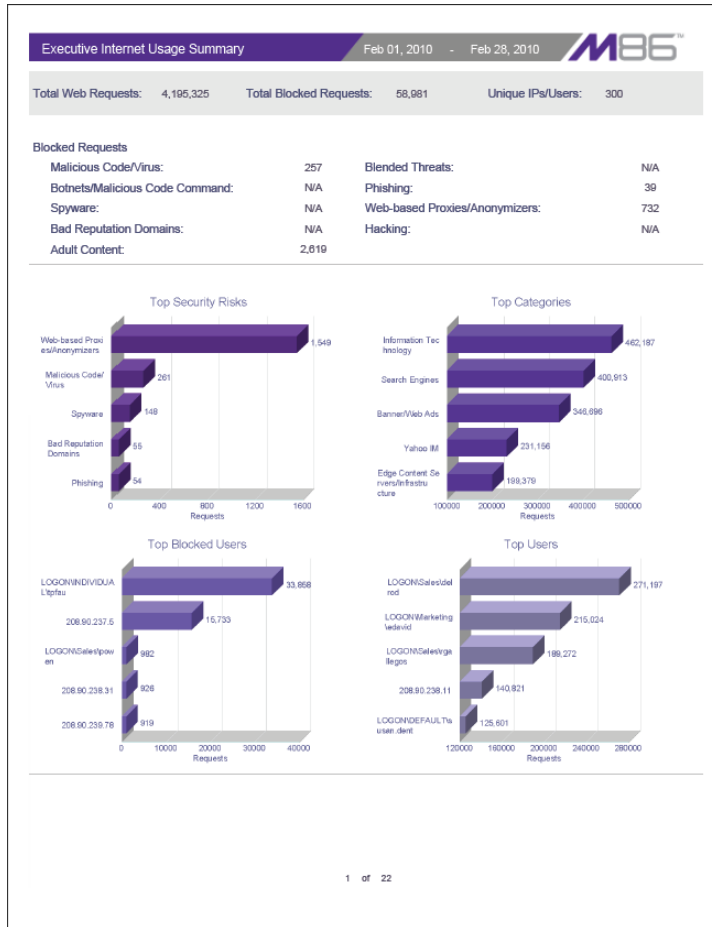


Fig. 3:6-32 Executive Internet Usage Summary monthly report, page 1

The second page includes a pie chart depicting Total Web Requests for M86 Category Groups. Each category group in the chart is represented by a pie slice and shows the number of requests and overall percentage for that pie slice.

For Weekly and Monthly reports, the bottom half of the second page includes a line chart for Daily Web Requests by Category Groups. Each category group in the chart is represented by a colored symbol that can be identified by

the key at the bottom of the page. The range of Requests is shown to the left of the chart, and the days (MM/D/YY) are shown beneath the chart.

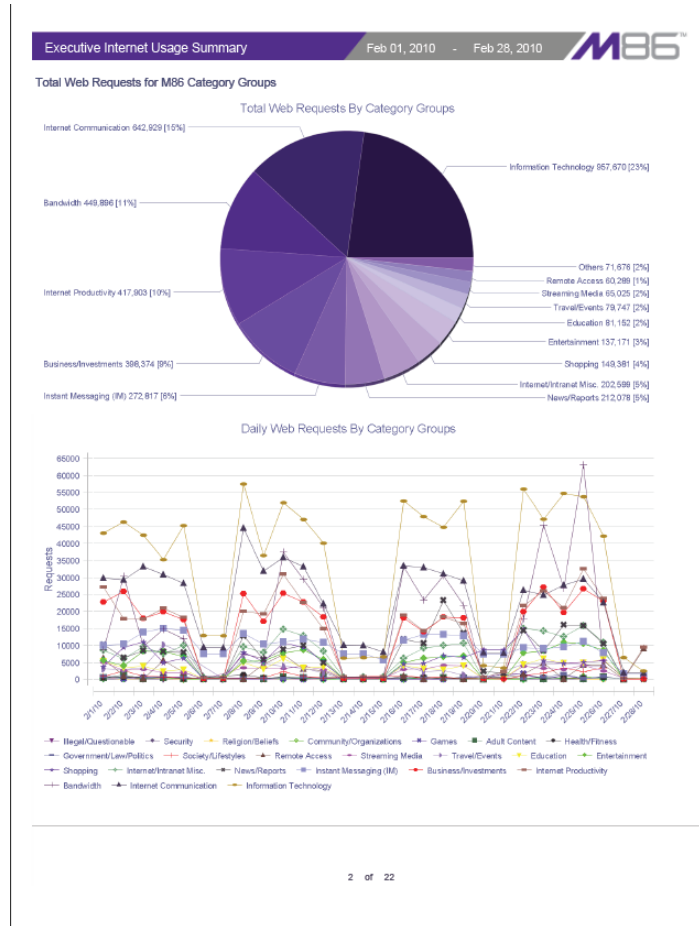


Fig. 3:6-33 Executive Internet Usage Summary monthly report, page 2

The third page includes a bar chart depicting Top Web Requests By Categories In Group 'X', in which 'X' represents the name of the category group. The top 10 affected library categories in the group are named in the Categories list to the left, and each library category is represented in the

chart by a bar and corresponding number of requests. The range of Requests is shown beneath the chart.

For Weekly and Monthly reports, the bottom half of the third page includes a line chart for Top Daily Web Requests by Categories in Group. Each library category in the chart is represented by a colored symbol that can be identified by the key at the bottom of the page. The range of Requests is shown to the left of the chart, and the days (MM/D/YY) are shown beneath the chart.

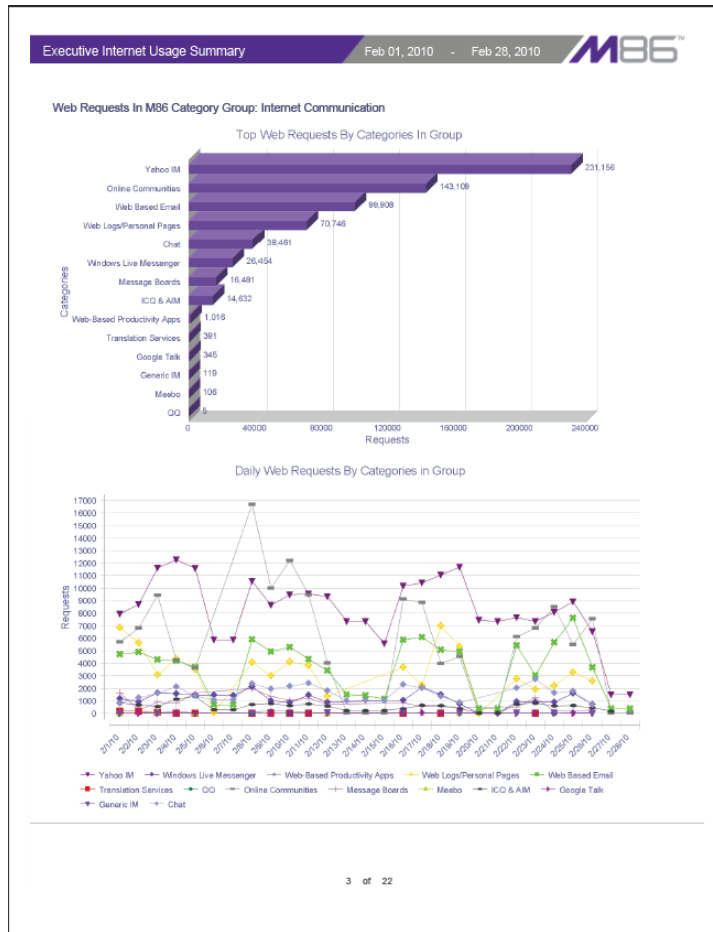


Fig. 3:6-34 Executive Internet Usage Summary monthly report, page 3

For Daily reports, the bottom half of the third page includes a chart showing the Top 10 Users In Category Group 'X', in which 'X' represents the name of the category group. The top 10 Users are listed in this chart, along with each user's corresponding Page Count, IP Count, Site Count, Category Count, Time HH:MM:SS, and Hit Count.

For Weekly and Monthly reports, the fourth page includes the Top 10 Users In Category Group 'X' chart:

Executive Internet Usage Summary		Feb 01, 2010 - Feb 28, 2010		M86™			
Top 10 Users In M86 Category Group: Internet Communication							
Users	Page Count	IP Count	Site Count	Object Count	Category Count	Time HH:MM:SS	Hit Count
LOGON\Sales\deirod	54,355	1	54	1729	7	18:30:30	56,084
LOGON\Sales\jedwards	30,768	1	42	1481	8	09:50:50	32,249
208.90.239.11	30,006	1	81	366	6	00:57:20	30,372
LOGON\Sales\idgray	16,935	4	48	12259	8	16:17:40	29,194
208.90.238.11	10,936	1	94	13664	8	00:55:40	24,600
LOGON\Sales\ryan.miller	22,111	1	30	221	6	12:05:10	22,332
LOGON\DEFAULT\Tsusan.dent	17,753	1	59	2636	6	08:14:20	20,389
LOGON\Sales\jgreen	11,135	2	45	8946	6	21:41:20	20,081
LOGON\Administration\miller	4,773	1	80	14611	8	06:38:30	19,384
LOGON\INDIVIDUAL\lmatheson	17,719	1	21	715	8	23:14:50	18,434

Fig. 3.6-35 Executive Internet Usage Summary monthly report, page 4

The balance of the report is comprised of statistics for each of the remaining category groups, represented by report page 3, and page 4 for Weekly and Monthly reports.



# TECHNICAL SUPPORT / PRODUCT WARRANTIES

## Technical Support

For technical support, visit M86 Security's Technical Support Web page at <http://www.m86security.com/support/> or contact us by phone, by email, or in writing.

### *Hours*

Regular office hours are from Monday through Friday, 8 a.m. to 5 p.m. PST.

After hours support is available for emergency issues only. Requests for assistance are routed to a senior-level technician through our forwarding service.

### *Contact Information*

#### **Domestic (United States)**

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1. Call **1-888-786-7999**
2. Select *option 3*

#### **International**

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1. Call **+1-714-282-6111**
2. Select *option 3*

#### **E-Mail**

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For non-emergency assistance, email us at [\*\*support@m86security.com\*\*](mailto:support@m86security.com)

## **Office Locations and Phone Numbers**

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### **M86 Corporate Headquarters (USA)**

828 West Taft Avenue  
Orange, CA 92865-4232  
USA

Local : 714.282.6111  
Fax : 714.282.6116  
Domestic US : 1.888.786.7999  
International : +1.714.282.6111

### **M86 Taiwan**

7 Fl., No. 1, Sec. 2, Ren-Ai Rd.  
Taipei 10055  
Taiwan, R.O.C.

Taipei Local : 2397-0300  
Fax : 2397-0306  
Domestic Taiwan : 02-2397-0300  
International : 886-2-2397-0300

## ***Support Procedures***

When you contact our technical support department:

- You will be greeted by a technical professional who will request the details of the problem and attempt to resolve the issue directly.
- If your issue needs to be escalated, you will be given a ticket number for reference, and a senior-level technician will contact you to resolve the issue.
- If your issue requires immediate attention, such as your network traffic being affected or all blocked sites being passed, you will be contacted by a senior-level technician within one hour.
- Your trouble ticket will not be closed until your permission is confirmed.

# Product Warranties

## *Standard Warranty*

M86 Security warrants the medium on which the M86 product is provided to be free from defects in material and workmanship under normal use for period of one year (the “Warranty Period”) from the date of delivery. This standard Warranty Period applies to both new and refurbished equipment for a period of one year from the delivery date. M86 Security’s entire liability and customer’s exclusive remedy if the medium is defective shall be the replacement of the hardware equipment or software provided by M86 Security.

M86 Security warrants that the M86 product(s) do(es) not infringe on any third party copyrights or patents. This warranty shall not apply to the extent that infringement is based on any misuse or modification of the hardware equipment or software provided. This warranty does not apply if the infringement is based in whole or in part on the customer’s modification of the hardware equipment or software.

M86 Security specifically disclaims all express warranties except those made herein and all implied warranties; including without limitation, the implied warranties of merchantability and fitness for a particular purpose. Without limitation, M86 Security specifically disclaims any warranty related to the performance(s) of the M86 product(s). Warranty service will be performed during M86 Security’s regular business hours at M86 Security’s facility.

## ***Technical Support and Service***

M86 Security will provide initial installation support and technical support for up to 90 days following installation. M86 Security provides after-hour emergency support to M86 server customers. An after hours technician can be reached by voice line.

Technical support information:

Online: <http://www.m86security.com/support/>

Toll Free: 888-786-7999, *press 3*

Telephone: 1+714-282-6111, *press 3*

E-mail: [support@m86security.com](mailto:support@m86security.com)

Have the following information ready before calling technical support:

Product Description: \_\_\_\_\_

Purchase Date: \_\_\_\_\_

Extended warranty purchased: \_\_\_\_\_

Plan # \_\_\_\_\_

Reseller or Distributor contact: \_\_\_\_\_

Customer contact: \_\_\_\_\_

## ***Extended Warranty (optional)***

The extended warranty applies to hardware and software of the product(s) except any misuse or modification of the product(s), or product(s) located outside of the United States. The extended warranty does not include new product upgrades. Hardware parts will be furnished as necessary to maintain the proper operational condition of the product(s). If parts are discontinued from production during the Warranty Period, immediate replacement product(s) or hardware parts will be available for exchange with defective parts from M86 Security's local reseller or distributor.

## ***Extended Technical Support and Service***

Extended technical support is available to customers under a Technical Support Agreement. Contact M86 Security during normal business hours, 8 a.m. to 5 p.m. PST, at (888) 786-7999, or if outside the United States, call 1+(714) 282-6111.

# APPENDICES SECTION

## Appendix A

### *Evaluation Mode*

By default, the ER Server and Client are set to the evaluation mode. This appendix explains how to use the ER Client in the evaluation mode.



**NOTE:** Contact the administrator of the ER Server module to activate the ER Client to function in the activated mode.

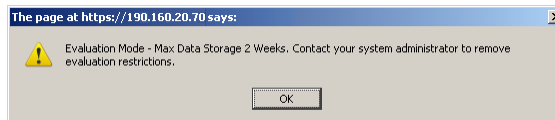
### Client

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On a box in the evaluation mode, when navigating to the ER Server Information window, the Evaluation Mode alert box opens.

### Evaluation Mode alert box

The Evaluation Mode alert box provides information about the maximum number of weeks of data storage:



*Fig. A-1 Evaluation Mode alert box*

Click **OK** to close the Evaluation Mode alert box.

## ER Server Information window

In the evaluation mode, the ER Server Information window displays the note “\*Evaluation Mode Enabled” above the ER Activity frame:

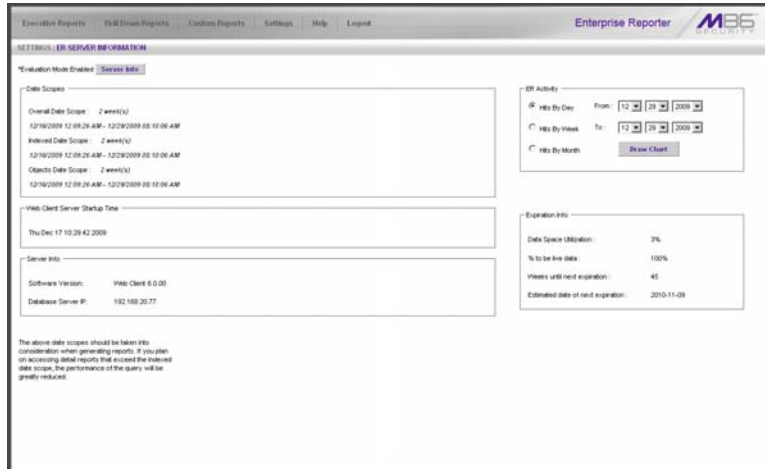


Fig. A-2 ER Server Information window

Click the **Server Info** button to the right of the “\*Evaluation Mode Enabled” note to open the Evaluation Mode alert box (see Fig. A:1).



# Appendix B

## *Lotus Notes Configuration*

This appendix provides information on configuring the ER Client to use Lotus Notes (4.5 and above) in a Microsoft Windows environment in which Lotus Domino is the primary e-mail server.

Making these configurations ensures that e-mail reports sent from the ER Client are transported via the MAPI client in Outlook Express directly to the IP Address of the Lotus Domino e-mail server. This setup avoids any delays or “hung” reports that may occur if settings point to the Lotus Notes client, since Lotus Notes utilizes the MAPI .DLL differently than mail clients native to the Windows OS.



**NOTE:** *Versions of Lotus Notes prior to 4.5 do not contain the necessary MAPI transport .DLL.*

## **Steps for Former MS Outlook / Express Users**

Follow these steps if Microsoft Outlook or Outlook Express was the primary e-mail client used on your system.

1. Delete any current e-mail accounts residing in Outlook or Outlook Express.
2. If Outlook is currently installed with your Microsoft Office system, uninstall Outlook—but **not** Outlook Express.

## Steps for Installing, Configuring Lotus Notes

### Step 1: Install Lotus Notes

Install and configure Lotus Notes to connect to your network's Lotus Domino server.



**NOTE:** Check with your System Administrator if you are unsure about your settings.

### Step 2: Configure Microsoft Mail Client

Make the following configurations for the Microsoft Mail Client from the control panel:

1. When running the Internet Connection and Internet Explorer e-mail client wizard, be sure the e-mail address is set to the "Internet address" of your Lotus Notes account.



**NOTE:** If this account has not yet been set up in Lotus Domino, create it now, and then run the e-mail client wizard.

2. When the e-mail account wizard requests the server address, use the IP Address only—**not** the Lotus Name—of your Lotus Domino server.



**TIP:** These settings also can be generated directly by using the "mail" settings in the Windows control panel. Again, any previous non-Lotus Notes accounts must be deleted.

### Step 3: Verify Internet Explorer Settings

1. Open Internet Explorer.
2. Go to **Tools > Internet Options > Programs** tab.
3. Check your "E-mail" and "Newsgroups" settings to make sure they are set to "Outlook Express"—**not** Lotus Notes.

# Appendix C

## ***Disable Pop-up Blocking Software***

A user with pop-up blocking software installed on his/her workstation will need to disable pop-up blocking in order to use the Client.

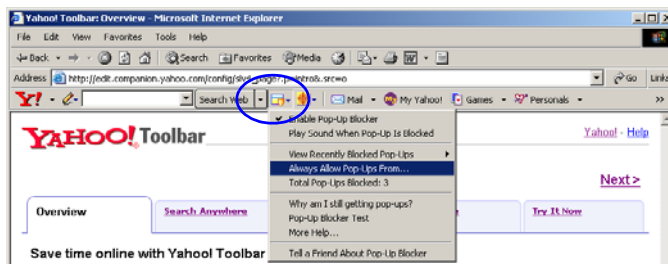
This appendix provides instructions on how to disable pop-up blocking software for the following products: Yahoo! Toolbar, Google Toolbar, AdwareSafe, and Windows XP Service Pack 2 (SP2).

## ***Yahoo! Toolbar Pop-up Blocker***

### **Add the Client to the White List**

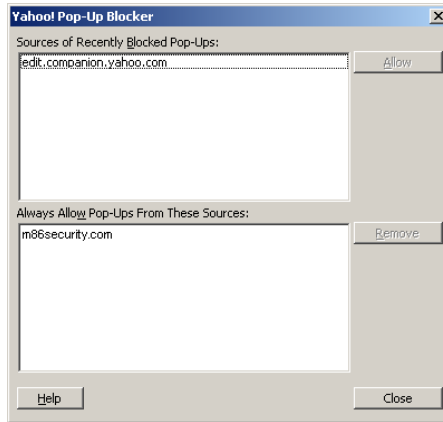
If the Client was previously blocked by the Yahoo! Toolbar, it can be moved from the black list and added to the white list so that it will always be allowed to pass. To do this:

1. Go to the Yahoo! Toolbar and click the pop-up icon to open the pop-up menu:



*Fig. C-1 Select menu option Always Allow Pop-Ups From*

2. Choose Always Allow Pop-Ups From to open the Yahoo! Pop-Up Blocker dialog box:



*Fig. C-2 Allow pop-ups from source*

3. Select the source from the Sources of Recently Blocked Pop-Ups list box to activate the Allow button.
4. Click **Allow** to move the selected source to the Always Allow Pop-Ups From These Sources list box.
5. Click **Close** to save your changes and to close the dialog box.

## Google Toolbar Pop-up Blocker

### Add the Client to the White List

To add the Client to the white list so that it will always be allowed to pass, go to the Google Toolbar and click the # blocked icon:

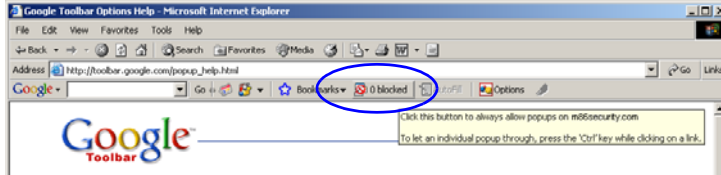


Fig. C-3 # blocked icon enabled

Clicking this icon toggles to the Site pop-ups allowed icon, adding the Client to your white list:

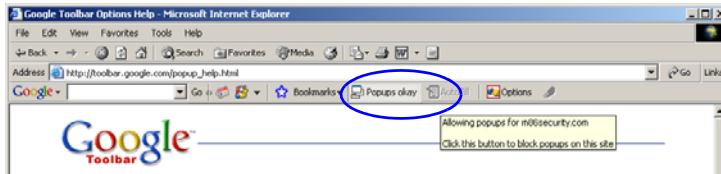


Fig. C-4 Site pop-ups allowed icon enabled

## ***AdwareSafe Pop-up Blocker***

### **Disable Pop-up Blocking**

---

AdwareSafe's SearchSafe toolbar lets you toggle between enabling pop-up blocking (# popups blocked) and disabling pop-up blocking (Popup protection off) by clicking the pop-up icon.

1. In the IE browser, go to the SearchSafe toolbar and click the icon for # popups blocked to toggle to Popup protection off. This action turns off pop-up blocking.
2. After you are finished using the Client, go back to the SearchSafe toolbar and click the icon for Popup protection off to toggle back to # popups blocked. This action turns on pop-up blocking again.

## Windows XP SP2 Pop-up Blocker

This sub-section provides information on setting up pop-up blocking and disabling pop-up blocking in Windows XP SP2.

### Set up Pop-up Blocking

There are two ways to enable the pop-up blocking feature in the IE browser.

#### Use the Internet Options dialog box

1. From the IE browser, go to the toolbar and select **Tools > Internet Options** to open the Internet Options dialog box.
2. Click the Privacy tab:

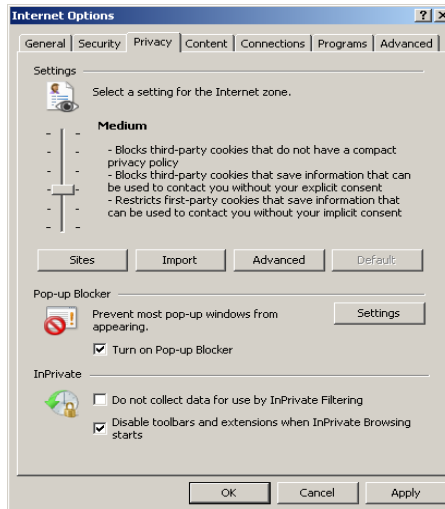
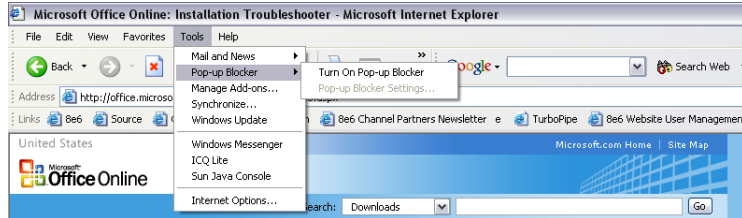


Fig. C-5 Enable pop-up blocking

3. In the Pop-up Blocker frame, check “Block pop-ups”.
4. Click **Apply** and then click **OK** to close the dialog box.

## Use the IE Toolbar

In the IE browser, go to the toolbar and select **Tools > Pop-up Blocker > Turn On Pop-up Blocker**:



*Fig. C-6 Toolbar setup*

When you click Turn On Pop-up Blocker, this menu selection changes to Turn Off Pop-up Blocker and activates the Pop-up Blocker Settings menu item.

You can toggle between the On and Off settings to enable or disable pop-up blocking.



## Add the Client to the White List

There are two ways to disable pop-up blocking for the Client and to add the Client to your white list.

### Use the IE Toolbar

1. With pop-up blocking enabled, go to the toolbar and select **Tools > Pop-up Blocker > Pop-up Blocker Settings** to open the Pop-up Blocker Settings dialog box:

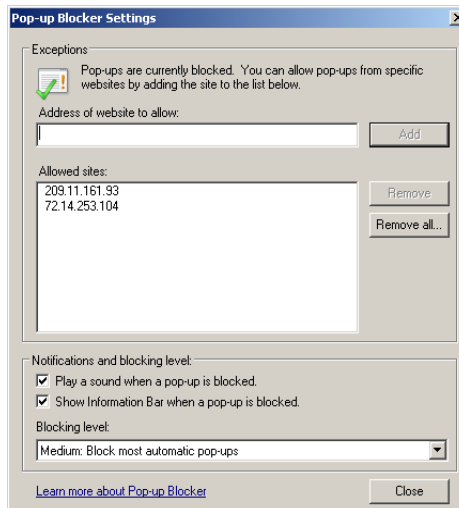


Fig. C-7 Pop-up Blocker Settings

2. Enter the **Address of Web site to allow**, and click **Add** to include this address in the Allowed sites list box. Click **Close** to close the dialog box. The Client has now been added to your white list.

## Use the Information Bar

With pop-up blocking enabled, the Information Bar can be set up and used for viewing information about blocked pop-ups or allowing pop-ups from a specified site.

### Set up the Information Bar

1. Go to the toolbar and select **Tools > Pop-up Blocker > Pop-up Blocker Settings** to open the Pop-up Blocker Settings dialog box (see Fig. C-7).
2. In the Notifications and Filter Level frame, click the checkbox for “Show Information Bar when a pop-up is blocked.”
3. Click **Close** to close the dialog box.

### Access the Client

1. Click the Information Bar for settings options:

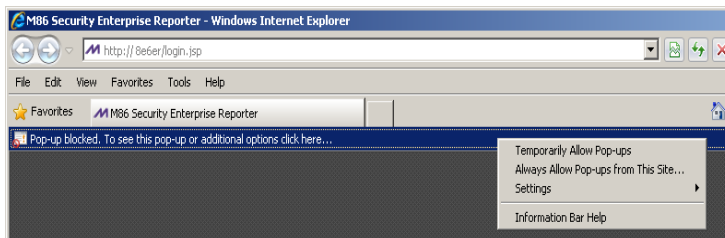


Fig. C-8 Information Bar menu options

2. Select **Always Allow Pop-ups from This Site**—this action opens the Allow pop-ups from this site? dialog box:

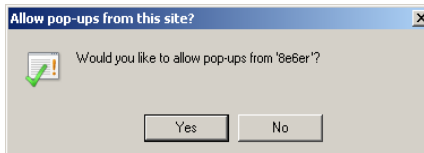


Fig. C-9 Allow pop-ups dialog box

3. Click **Yes** to add the Client to your white list and to close the dialog box.



**NOTE:** *To view your white list, go to the Pop-up Blocker Settings dialog box (see Fig. C-7) and see the entries in the Allowed sites list box.*

# Appendix D

## *Glossary*

This glossary includes definitions for terminology used in this user guide.

**double-break report** - a report that uses two sets of criteria, such as User/Sites or Category/IPs.

**hit count** - the number of pages and/or objects end users access as the result of entering URLs in a browser window.

**object count** - the number of objects end users access on a Web page, including images, graphics, multimedia items, and text items. The number of objects on a page is generally higher than the number of pages a user visits.

**page count** - the number of Web pages end users access, which can exceed the number of objects per page in categories that use a lot of pop-up ads (porn, gambling, and other related sites). A user may visit only one site, but visit 20 pages on that site if the page has pop-up ads or banner ads that link to other pages.

**time count** - the amount of time end users spend on a given Web page, including the number of times that page is refreshed by either the user or a banner ad.

**Wall Clock Time count** - the amount of time end users spend on the Internet, based on the Wall Clock Time algorithm. For each user, the number of seconds from the log is dropped, and any unique minute within a given hour counts as one minute.

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