

INFOWATCH

# InfoWatch Traffic Monitor 6.5

User Guide

**InfoWatch Traffic Monitor 6.5**

# User Guide

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# 1 INTRODUCTION

InfoWatch Traffic Monitor (also referred to as InfoWatch Traffic Monitor or the System) is a distributed multi-component system designed to control different types of traffic (SMTP, IMAP, POP3, HTTP, HTTPS, ICQ, NRPC). InfoWatch Traffic Monitor also analyses data received from InfoWatch Device Monitor.

The Management web console (also referred to as Management Console or MC) is a part of the InfoWatch Traffic Monitor system. The web console allows you to configure the System settings and monitor the System operation.

The Management Console has a user-friendly interface, so this Guide contains only general information and examples to represent functionality of the System.

## 1.1 Who Should Read this Guide

Information in this guide is intended for users who manage the System (perform the System configuration, analyze information objects, etc.).

The Guide is intended for users with basic knowledge of Microsoft Windows.

## 1.2 Set of Documents

For more information see the following documents:

- «*InfoWatch Traffic Monitor. User Guide*».

The document describes operation with InfoWatch Traffic Monitor: configuration setting, data export/import, creating policies for objects processing.

- «*InfoWatch Traffic Monitor. Administration Guide*».

Contains information on System administration (database, server-end).

- *«InfoWatch Device Monitor. User Guide»*

Contains a description of the InfoWatch Device Monitor system operation principles as well as instructions on installation, configuration of a system, and system maintenance.

## 1.3 Technical Support

For support with the issues and questions related to the software you may contact the Technical Support Service:

- If you have purchased the product from a partner of InfoWatch, you should contact the Technical Support Service of this partner company.

- If you purchased the product directly from InfoWatch, you can contact our Technical Support Service at support@infowatch.com. The representatives of our Technical Support Service are available to assist you from Monday through Friday from 7 AM to 9 PM (Moscow time), except weekends and Russian public holidays.

You can also visit InfoWatch Customer Portal: http://cp.infowatch.com/en/.

Before contacting Technical Support, please refer to our Knowledge Base: https://kb.infowatch.com. The Knowledge Base may already contain the answer to your question or description of the problem you are experiencing.

# 2 INFOWATCH TRAFFIC MONITOR OVERVIEW

InfoWatch Traffic Monitor allows you to control data traffic in the corporate network in order to detect and prevent unauthorized use of confidential data.

**InfoWatch Traffic Monitor Main Features:**

- Interception of SMTP, IMAP and POP3 traffic. It is possible to intercept traffic (or the copy of traffic) passed by a mail relay server or the copy of the traffic that passes through the hardware with the CISCO SPAN.
- Interception of the HTTP and HTTPS traffic. It is possible to intercept either traffic passed through an ICAP-supporting proxy server or the copy of traffic that goes through the CISCO SPAN-enabled equipment.

> **Note:**
>
> While integrating with the Blue Coat proxy server, the interception of HTTPS traffic is available if the proxy server processes HTTPS traffic as HTTP traffic

- Intercepting a copy of ICQ traffic (the OSCAR protocol) passing through the equipment that supports the CISCO SPAN technology. When ICQ connects through HTTP, the System intercepts ICQ traffic similar to HTTP traffic.

> **Warning!**
>
> The intercepting and analysis of encrypted ICQ traffic are not supported (including one transferred by SSL protocol).

- Reviewing files located in the corporative network (open network folders, workstation local discs, and SharePoint 2007/2010/2013 file storage) with the Crawler subsystem.
- Analyzing Skype traffic, shadow copies of files, print jobs, traffic transferred by HTTP, HTTPS and FTP protocols; receiving and transmitting mail via SMTP, POP3 and IMAP using MAPI interface, controlling data exchange via Jabber (XMPP protocol), Mail.Ru Agent (MMP protocol), WhatsApp (WhatsApp protocol) and SMS. Voice messages in Skype can also be intercepted. Interception of listed data is performed by InfoWatch Device Monitor system.
- Analyzing shadow copies of files intercepted by DeviceLock version 6.3 or higher (provided by SmartLine, Inc.).
- Intercepting and analyzing MS Lync objects via IW Lync Adapter installed on MS Lync server.
- Analyzing the contents of the intercepted traffic in order to detect violations of the corporate security policy.
- Filtering the intercepted traffic by allowing or blocking the delivery of certain data.

**Warning!**

This feature is not available when the copy of traffic is processed.

**InfoWatch Traffic Monitor Components:**

| InfoWatch Traffic Monitor Component | Purpose |
|---|---|
| Traffic Monitor Server | Interceptors: **IW_SNIFFER**, **IW_ICAP,** and **IW_SMTPD**.<br>**Analysis subsystem** receives event context and checks if the events contain technology elements and correspond to protected objects.<br>**Policy applying subsystem** implements actions defined by the user according to the corporate security policy. |
| Database | Storage of information associated with the System operations (intercepted data and results of their analysis). |
| Device Monitor | Controlling user access to the peripherals, monitoring operations (data copying to removable storages and FTP, sending data to printing, using messengers) and intercepting the traffic from instant messengers. |
| Crawler | Checking files from the corporate network (open network folders, local disks of workstations, and SharePoint 2007/2010/2013 file storage). |
| Connectors | Integration with external systems, generating events. |
| Web Management Console | Configuring rules for analyzing and filtering traffic, analysis of intercepted data. |

General principles of the System operation are described in the following articles:

- Object Interception
- Object Analysis and Verdict
- Retrospective Data Analysis, User Decision on an Object
- InfoWatch Traffic Monitor Transport Modes
- Uploading Object to Database
- Specific Features of Blocking HTTP-queries and Messages Sent via Web Services
- InfoWatch Device Monitor Functions

# 2.1 Object Interception

The System objects are the following:

- traffic objects (SMTP, IMAP, and POP3 e-mails, HTTP and HTTPS requests, ICQ, Skype (voice and messages), MS Lync, XMPP, WhatsApp, Mail.Ru agent, and SMS messages);

- shadow copies of files;
- print jobs.

There are several ways to intercept objects, depending on their type:

| Object type | Object interception options |
|---|---|
| SMTP, IMAP and POP3 | • The System intercepts and delivers SMTP, IMAP, and POP3 traffic. It is possible to filter intercepted objects (the delivery can be allowed or blocked).<br>• The System receives a copy of SMTP, IMAP, and POP3 traffic from the corporate mail relay server. The System does not participate in traffic delivery.<br>• The System receives a copy of SMTP, IMAP, and POP3 traffic passing through the switch equipped with SPAN port. The copy is intercepted by means of Sniffer. The System does not participate in traffic delivery. |
| HTTP | • The System intercepts HTTP traffic by means of integration with an ICAP server. It is possible to filter intercepted objects (the delivery can be allowed or blocked).<br>• The System receives a copy of HTTP traffic that passes through a switch with a SPAN port. The copy is intercepted by means of Sniffer. The System does not participate in traffic delivery. |
| HTTPS | The System receives a copy of traffic from InfoWatch Device Monitor |
| MAPI | The System receives a copy of traffic from InfoWatch Device Monitor |
| FTP | The System receives a copy of traffic from InfoWatch Device Monitor |
| ICQ | • The System receives a copy of ICQ traffic that passes through a switch with a SPAN port. The copy is intercepted by means of Sniffer. The System does not participate in traffic delivery.<br>• When ICQ connects through HTTP, the System intercepts ICQ traffic in the same way as HTTP traffic. |
| Skype and Mail.Ru Agent messages | The System receives a copy of Skype (including voice messages), Mail.Ru Agent, WhatsApp traffic from InfoWatch Device Monitor |
| MS Lync | The System receives a copy of traffic from IW Lync Adapter installed on MS Lync server |
| Files located in the corporate network | The System receives copies of files from the Crawler subsystem |
| Shadow copies of files and print jobs received from InfoWatch Device Monitor | The System receives a copy of traffic. Blocking user actions (print jobs, access to devices) can be performed only by means of InfoWatch Device Monitor. |
| Shadow copies of files received from DeviceLock | The System receives a copy of traffic. Blocking user actions (access to devices) can be performed only by means of DeviceLock. |

Interception options and further delivery of objects depends on InfoWatch Traffic Monitor transport modes (see "InfoWatch Traffic Monitor transport modes").

## 2.2 Object Analysis and Verdict

Processing and analyzing intercepted objects as well as applying security policies to them are performed by the following subsystems of InfoWatch Traffic Monitor:

| **IW TM subsystem** | **Subsystem modules** | **Subsystem/module features** |
|---|---|---|
| Processing subsystem | SMTP and POP3 Processing module (copy mode), HTTP Processing module (copy mode), ICQ Processing module (copy mode), Shadow Copies Processing module, SMTP Processing module (blocking mode), HTTP Processing module (blocking mode). | Extracting significant data and enclosures from the object, defining the enclosure format, and forwarding the extracted texts to the Analysis subsystem. |
| Analysis subsystem | Linguistic Analysis module | Checking if the object text corresponds to any categories |
| | Text Objects Detecting module | Searching through the object text for specific text objects (e.g. credit card numbers) |
| | Digital Prints Detecting module | Searching through the object text for quotes from sample documents |
| | Blanks Detecting module | Searching through the object text for completed forms |
| | Stamps Detecting module | Searching through the object text for stamp images |
| | Database Unloadings Detecting module | Searching through the object text for quotes from a database |
| | Graphic Objects Detecting module | Searching through the object text and enclosures for images of particular classes |
| Policies Application subsystem | Active Directory and Domino Directory Integration module | Providing the initial import and periodical synchronization of Active Directory and Domino Directory structure with a list of users and workstations in Traffic Monitor for further binding this information with data from the intercepted objects. |

| IW TM subsystem | Subsystem modules | Subsystem/module features |
|---|---|---|
| | Decision-Making module | Ensuring corporate security policies by employing policy rules to the intercepted objects |

**The object analysis is performed in the following order:**

1. **Detaching object attributes** – the Processing subsystem detaches object attributes. For example, SMTP letter attributes are the sender and recipient addresses, subject, etc. For the list of available attributes, see "Event tile".
2. **Extracting enclosed files** – the Decision-Making module analyzes enclosed files according to such attributes as the file name and type.
3. **Analysis of text and graphic objects** – the Analysis subsystem processes text and graphic data: texts of e-mails, messages, and queries, texts extracted from attachments of the supported format, and image files.

**Note:**

For MS Office 2007 and 2010 document, the System also analyzes metadata specified in document properties (in the **Description** block of the **Details** tab).

The System supports several types of analysis depending on your product license:

| **Content analysis technology** | **Technology description** |
|---|---|
| Linguistic analysis | Determining the subject and contents of text according to terms (words and phrases) found in the text. The term search is performed using the base of categories and terms which are specific for an organization. All terms are divided into categories (each term can be correlated with one or more categories). Thus, the presence of a term belonging to a particular category allows relating the text to this category. For example, the *Salary* term can be included in several categories (*Internal payments*, *Working conditions*). The presence of this term in the text means that the text can belong to mentioned categories. |
| Detecting text objects | Search for text objects matching the specified templates (e.g., searching for credit card numbers in the intercepted objects). |
| Detecting digital prints | Search for fragments of text matching the predefined sample documents (orders, financial reports, contracts, etc.). |
| Detecting blanks | Search for blanks matching the specified templates (questionnaires, receipts, etc.). |
| Detecting passports of citizens of the Russian Federation | Search for passport images of Russian Federation citizens. The technology functions if the *Russian Federation citizen passport* text object is enabled. |
| Detecting stamps | Search for stamp images of a preset type. Images of round impressions used in the organizations can be used as stamps |
| Detecting database unloadings | Search for quotes from specified database. These can be lists of employees' salary, other personal data, etc. |
| Detecting graphic objects | Search for images corresponding to any of the preset categories. Graphic objects can be images of passports, credit cards, etc. |

4. Based on the results of the analysis, the Decision-Making module makes a conclusion on possible violation of the security policy and determines which actions should be performed in case of violation. Rules, which determine the System actions in case of violation, are set in a policy. The actions can be as follows (the set of possible actions is defined by the rule type):
    - **Assign violation level to event**. Possible values: **High**, **Medium**, **Low**, **No violation**.

- **Assign status to persons**. A status that will be assigned to violators (for details, see "Statuses").
- **Assign tags to event**. Tags that will be assigned to the event in the policy is violated (for details, see "Tags").
- **Assign verdict to event**. The System decision whether the event is a potential violation. Possible values: **Allow**, **Block**, **Quarantine**.
- **Delete event**. The event will not be saved to the database.

## 2.3 Retrospective Data Analysis, User Decision on an Object

Objects in a database are available for analysis in the Management Console. The user can view the result of automatic analysis of the object and make his/her own decision on the object (the *Decision* attribute). By default, the *Decision* attribute of each object has the *No Decision* value. The user can make one of the following decisions for the object:

- *Violation*. Based on the analysis results, the user has decided that the object violates the corporate security policy.
- *No violation*. The user has decided that the object does not violate the corporate security policy.
- *No decision*. The user has not made a decision if the object violates the corporative security policy or not.
- *Further Analysis is Needed*. The user has decided that the object needs further processing.

The user decision may also result in changing the verdict returned by the System (see "Making Decision on Object") and the sending status of an SMTP mail (see "Dispatching a Quarantined Event").

**Note:**

When working in the *Inline* mode and applying *No violation* verdict, the email will leave the company perimeter irrespective of the further editing the user decision.

## 2.4 InfoWatch Traffic Monitor Transport Modes

InfoWatch Traffic Monitor supports two transport modes: ***Blocking*** and ***Copy***. Conditions that specify the transport mode for different objects are defined in the object analysis script. The transport mode is assigned to the object when the object is analyzed in Traffic Monitor Server (see “Object Analysis and Verdict"). Actions related to the object transporting are performed according to the selected transport mode.

**Warning!**

The transport mode can be specified only once for each object.

Table 1 shows available transport modes for different types of objects.The difference between modes is how the objects are transported (see table 2).

**Table 1**

| Transport mode | Description |
|---|---|
| **Blocking** | InfoWatch Traffic Monitor intercepts, analyses, and transports objects. In this mode, the verdict defines if the object will be delivered to recipients. Besides, in some cases, the delivery status of the SMTP messages can be changed after changing the user decision (see "Specific Features of Blocking HTTP-queries and Messages Sent through Web Services"). |
| **Copy** | In this mode, the System receives copies of objects. The difference from the blocking mode is that the System does not participate in object transporting. Thus, the System performs the object analysis only. As the System analyses the copy of objects, the verdict and the analysis-based user decision do not impact the object delivery to recipients. |

**Table 2**

| Object type | Blocking transport mode | Copy transport mode |
|---|---|---|
| SMTP | Yes | Yes (for traffic copy received from mail relay server or from Sniffer) |
| HTTP request | Yes (only when intercepting traffic over ICAP) | Yes |
| ICQ message | No | Yes (for traffic copy received from Sniffer) |
| Skype, Jabber, Mail.Ru Agent, or WhatsApp message | No | Yes |
| SMS | No | Yes |
| MS Lync | No | Yes |
| Shadow copy of a file | No | Yes |
| Photo | No | Yes |

# 2.5 Uploading Object to Database

After an object is analyzed and the decision is made (see “Object Analysis and Decision on Object”), both the object and its XML context are uploaded to the database. The XML context includes:

- Data (attributes and text) extracted from the object and its attachments

- The results of the object analysis
- Information about the decision on the object.

## 2.6 Specific Features of Blocking HTTP-queries and Messages Sent through Web Services

If the normal transport mode (see "InfoWatch Traffic Monitor Transport Modes"), the System decides to block an HTTP-request or a message sent via a web service (for example, *mail.ru*), then the browser of the user who sent a request or a letter will display the blocking message.
If sending mail is performed through mail services built on AJAX technology (such as Gmail, Windows Live Hotmail, etc.), then the user may not receive a message saying that the letter delivery is locked. As a rule, a message sent by the mail service is displayed in this case.
Post requests to a number of Web resources (see table below), are processed by the System in accordance with specific rules:

- on the object info pane (see "Object Interception"), the attributes *From*, *To*, *Copy*, *Subject,* and *Sent* are displayed as well as attachments (if any);
- if these attributes cannot be found and no text can be extracted from headers, such requests can be deleted as "garbage" traffic. For example, background requests for status updates in social networks are considered garbage traffic.

Interception of HTTP/HTTPS requests supports IP Board, phpBB, and vBulletin engine-based forums.

Supported Web resources:

| **Type of Web resource** | **Resources** | |
|---|---|---|
| **Without restrictions** | **With restrictions** | |
| Web mail | mail.ru, mail.yandex.ru, rambler.ru, pochta.ru, km.ru, newmail.ru, gmail.com, inbox.com, hotmail.com, hotmail.ru, live.com | yahoo.com, mail.com, aol.com, gmx.com |
| Blogs and social networks | facebook.com, blogs.mail.ru, liveinternet.ru (li.ru), my.ya.ru, diary.ru, blogspot.com (blogger.com), loveplanet.ru/a-journal, myspace.com, perfspot.com | myspace.com, blogger.com, vkontakte.ru (vk.com), odnoklassniki.ru, twitter.com, livejournal.com (.ru), wordpress.com, linkedin.com |
| Job search and CV posting sites | | moikrug.ru, hh.ru, job.ru, rabota.ru, jobs.com, eurojobs.com |
| Forums | forum.ru-board.com, sysadmins.ru, talk.mail.ru, dom.bankir.ru, biznet.ru | forum.ixbt.com, groups.google.ru (.com) |

The following file storages and hostings are supported**:**blogspot, google drive, cloud.mail.ru, disk.yandex.ru, mail.qip.ru, file.qip.ru, onedrive.live.com, google plus, talk.mail.ru.

# 2.7 InfoWatch Device Monitor Functions

**InfoWatch Device Monitor** (further referred to as InfoWatch Device Monitor or the System) is a mean of managing access to your computer peripherals. Moreover, the System lets you monitor data that is being transferred from computer to removable devices, sent to printer or over network. Resulting data is analyzed by InfoWatch Traffic Monitor.

The main functions of InfoWatch Device Monitor System:

- realtime monitoring of managed computers (workstations and mobile devices)
- managing employee access to system peripherals (see "Configuring Device Monitor Rule (DM)")
- monitoring computer print operations (see "Configuring Photo Monitor Rule (DM)")
- supervising Instant Messengers: Skype, WhatsApp, Jabber (XMPP protocol), and Mail.Ru Agent (MMP protocol) (see "Configuring IM Client Monitor Rule (DM)")
- supervising SMS of mobile communication (see "Configuring IM Client Monitor Rule (DM)")
- supervising traffic transferred by FTP and FTPS (see "Configuring FTP Monitor Rule (DM))
- supervising traffic transferred by HTTP and HTTPS (see "Configuring HTTPS Monitor Rule (DM)")
- supervising data transferred by network connections beyond corporate network (see "Configuring Network Monitor Rule (DM)")
- supervising emails transferred by protocols (SMTP, POP3, IMAP, MAPI) (see "Configuring Mail Monitor Rule (DM)")
- supervising photographs made by cameras of mobile devices (see "Configuring Photo Monitor Rule (DM)")
- retrieving data from managed computers (workstations and mobile devices) (see "Configuring Device Monitor Rule (DM)")
- transferring retrieved data for InfoWatch Traffic Monitor analysis
- Microsoft RDP and Citrix ICA client control (see "Configuring Device Monitor Rule (DM)")
- cloud storage control (see "Configuring Cloud Storage Monitor Rule (DM)")
- screenshot control (see "Configuring ScreenShot Control Monitor Rule (DM)")
- application control (see "Configuring Application Monitor Rule (DM)")
- clipboard control (see "Configuring Clipboard Monitor Rule")
- event storage management (see "Events")

**Note:**

Some functions are available in both regular and safe mode of your operating system (see "Operating in Safe Mode").

User (employee) actions are observed and controlled on managed computers.
***Managed computer*** is a workspace (workstation or mobile device) that gives you access to controlled files and

peripherals.
***Controlled files*** are files that must be monitored according to corporate security policy.
***Monitored peripherals*** are system devices controlled by InfoWatch Device Monitor.

To monitor and control computers you need a Client module installed. Client module includes the following interceptors: **File Monitor, Print Monitor, Device Monitor, IM Client Monitor, FTP Monitor, HTTP(S) Monitor, Network Monitor, Mail Monitor, Application Monitor, Cloud Storage Monitor, ScreenShot Control Monitor, Photo Monitor**.

**File Monitor** controls writing operations on removable devices and registers successful operations. This lets you to
monitor the following actions:

- creating/editing files on removable devices;
- copying/moving files to removable devices. This tracks files copied/moved from managed computers, removable devices, or over network.

See more information on configuring interceptor rule in "Configuring File Monitor Rule (DM)" section.

**Device Monitor** controls access to system peripherals. Possible access levels depends on device type. See more information on configuring interceptor rule in "Configuring Device Monitor Rule (DM)" section.

**Print Monitor** enables monitoring printing operations on local and network printers. It creates a copy of print job and sends it to InfoWatch Traffic Monitor for analysis. See more details in "Configuring Print Monitor Rule (DM)" section.

**IM Client Monitor** controls access to instant messengers: Skype, Jabber (XMPP protocol) and Mail.Ru Agent (MMP protocol). You can completely deny application usage or just make chat copy. Also, you can create shadow copies of transferred files, messages, and chats. See more details in "Network Traffic Control" and "Configuring IM Client Monitor Rule (DM)" sections.

**FTP Monitor** controls data exchange through FTP/FTPS protocol. You can restrict or completely deny the usage of FTP/FTPS protocol and create shadow copies of transferred files. See more details in "Configuring FTP Monitor Rule" section.

**HTTP(S) Monitor** controls data exchange through HTTPS protocol. The System is able to create shadow copies of transferred files. See more details in "Configuring HTTP(S) Monitor Rule" section.

**Network Monitor** enables deny of data transferring by any network connections except corporate ones or connections with specified allowed servers. See more details in "Network Traffic Control" and "Configuring Network Monitor Rule" sections.

Mail Monitor controls receiving and sending emails. The System allows you to completely deny sending and receiving emails or accept the receiving emails only or completely accept sending and receiving emails. See "Configuring HTTP(S) Monitor Rule"

**Application Monitor** controls employees access to applications launched on computers. See "Configuring Application Monitor Rule".

**Cloud Storage Monitor** controls data transfer through cloud storages web-clients. See "Configuring Cloud Storage Monitor Rule".

**Clipboard Monitor** control access of employees to the clipboard. See "Configuring Clipboard Monitor Rule (DM)".

**ScreenShot Control Monitor** controls screenshots on the client side. See "Configuring ScreenShot Control Monitor Rule".

**Photo Monitor** enables shadow copies of photos made by cameras of controlled mobile devices. See "Configuring Photo Monitor Rule".

All the created file copies are not stored in InfoWatch Device Monitor but transferred to InfoWatch Traffic Monitor for
analysis.

## 2.7.1 Operation in Safe Mode

Some of InfoWatch features are still available in safe mode (with network features or without them). The following table lists the features available in safe mode.

| InfoWatch Device Monitor Feature | Operating system mode |
|---|---|
| Managing access to peripherals (except devices that are unavailable in safe mode) | Safe Mode<br>Safe Mode with Networking |
| Write control on removable devices | Safe Mode<br>Safe Mode with Networking |
| Monitoring managed computers | Safe Mode with Networking |
| Managing access to instant messengers: Skype, Jabber (XMPP protocol) and Mail. Ru Agent (MMP protocol) | Safe Mode with Networking |
| Managing data exchange through FTP/FTPS protocol | Safe Mode with Networking |
| Managing data transfer by network connections beyond corporate network | Safe Mode with Networking |

# 3 TRAFFIC MONITOR MANAGEMENT CONSOLE: GENERAL INFORMATION

Management Console needs a permanent connection to the database server. To connect to the database server, you need to log in.

During the login process, the following conditions are checked:

- the database contains a user account with the specified credentials;
- the account is not blocked.

You can log into the System only if both conditions are met.

If authorization is successful, you can access the main window of the Management Console. Otherwise, an error message is displayed.

Depending on the role assigned to the account under which you log on, you can have the following rights:

- Administrator role has all the necessary rights for the initial configuration of the Management Console
- Security Officer role has all privileges, except for the initial configuration of the Management Console

**Note:**

This guide does not describe the administration process. For this information, please see "*Infowatch Traffic Monitor. Administration Guide*".

After you log on, you can configure the System (on how the System operates after installation and before configuring, see "System Operation before Configuring"). The System configuration consists of the following actions:

- Configuring the base of technologies
- Composing lists
- Creating protected objects
- Configuring System response to employees' actions that violate the corporate security policy

When you finish configuring the System, you need to apply the updated configuration (see "Configuring the System").

**Note:**

If the System has been configured before, and that configuration is sufficient for your purposes, no additional configuring is required.

Typical user actions are listed in "Solving Cases". After configuring the System, the security officer may view a report on corporate security violations (see "Managing Interception Objects").

The user can also modify the Console interface and perform other tasks.

If several security officers use the Management Console simultaneously, you should periodically refresh the page in order to obtain relevant data (see "Refreshing Data in Management Console").

**Warning!**

For correct operation of the System, make sure that anti-virus and other blocking software does not block the Internet content.
*For example*, in G DATA Security anti-virus, you need to clear the check box for the **Process Internet content (HTTP)** field.

# 3.1 System Operation Before Configuring

The installed System which has not yet been configured (on the System configuring, see “Cases Solving") operates in the following way:

- intercepts traffic and checks if interception objects match predefined categories. If the interception objects match some category, the System aassignsa corresponding attribute to the object.

  **Warning**

  If **Don't preinstall loadable technology settings** option has been selected during the installation of the System, you will need to import the base of technologies (see "Exporting and Importing the Base of Technologies") for the correct operation of analysis.

- allows logging into the System using one of the predefined accounts:
  - *Administrator* (Administrator role);
  - *Officer* (Security officer role).
- Displays information about interception objects in the Management Console. To display information about traffic senders and recipients, you should configure the lists of persons and workstations (see "Managing Persons and Workstations").
- Saves interception objects to the database. During analysis, no actions are performed with the objects. To specify how interception objects should be processed, you should configure the company perimeter (see "Managing Perimeters"). After that, the System will apply actions described in "Default Policies" when analyzing interception objects.

# 3.2 Configuring the System

The System configuration includes settings required for checking objects on Traffic Monitor Server as well as for data monitoring and analysis.

Each object passed to Traffic Monitor is processed according to the configuration version which is currently actual on the server. After processing, the object is uploaded to the database with all attributes assigned to it as a result of processing.

**Warning!**

The System does not reprocess the object after the configuration is changed.

The version of an active configuration is displayed in the upper part of the workspace.




Besides, the System uses the active configuration to form a configuration version that is then deployed to Device Monitor Agents.

**Note:**

The configuration version that is used in Device Monitor is displayed in Device Monitor Console (see "Synchronization of Traffic Monitor Policies"). If necessary, you can compare version numbers in Traffic Monitor and Device Monitor to make sure that Device Monitor uses an actual version.

**The configuration process includes:**

- Creating a technology database (see "Managing the Base of Technologies"):
  - Selecting terms to be detected - *only when using Linguistic Analysis technology (see "Terms")*;
  - Selecting text object types to be detected - *only when using Detecting Text Objects technology (see "Text objects")*;
  - Selecting sample documents to be detected - *only when using Detecting Sample Documents technology (see "Sample Documents")*;
  - Selecting blanks to be detected - *only when using Detecting Blanks technology (see "Blanks")*;
  - Selecting stamps to be detected - *only when using Detecting Stamps technology (see "Stamps")*;
  - Selecting database unloadings to be detected - *only when using Detecting Database Unloadings technology (see "Database Unloadings")*;
  - Selecting graphical object types to be detected - *only when using Detecting Graphic Objects technology (see "Graphical objects").*
- Creating protected objects based on the elements of the base of technologies *(see "Protected objects")*.
- Creating catalogues of:
  - Persons and computers *(see "Managing Persons and Computers")*;

  - Tags *(see "Managing Tags")*;
  - Web resources *(see "Managing Resources Lists")*;
  - Statuses *(see "Managing Statuses")*;
  - Perimeters *(see "Managing perimeters")*;
- Creating policies according to which objects on the Traffic Monitor Server are checked *(see "Configuring System Response")*

**Note:**

A configuration that is sent to Device Monitor includes only the following elements:

- Persons and computers
- Perimeters
- Data protection policies on agents
- Categories and text objects
- Protected objects that contain only categories and text objects

If you change any of the configuration settings, the edited configuration version is saved in the System. Upon this:

- on the computer of the user who is changing the configuration, the following message is displayed at the top of the browser workspace:




- on the computers of users who cannot change the configuration, the following message is displayed at the top of the browser workspace:
  **Configuration is being edited by user <security_officer> since 15.06.2015 12:54 PM**

**Warning!**

The changed configuration is available only to the user who is changing it until this configuration is applied, saved or rolled back. Other Console users work with the System configuration version that was applied last and are not allowed to change it.

When you finish editing the configuration, you can choose one of the following actions:

- **Apply configuration** (see "Applying System Configuration") - the updated configuration becomes active on the server.
- **Save configuration** - the updated configuration becomes accessible for other Console users but it will not be used in the System for traffic control and data analysis.
- **Rollback changes** - the configuration that was last applied on the server will be used in the Console and all changes will be discarded. To discard changes, click **Rollback** in the window with changes. In

the **Description** field, you may specify why you are undoing the changes. This information will be stored in the database.

After integration with LDAP catalogues or adding new contacts by means of post-identification, the configuration is updated automatically. Configuration update is performed regardless of its current status.

**Note:**

Information about contacts added by means of post-identification is updated every 15 minutes.

## 3.3 Displaying Actual Data in Management Console

Several users can work with the System at the same time. Each user operating the Management Console has access to the data from the last applied configuration (see "Applying System Configuration"), as well as the changes made by this user during the current session of editing configuration.

To keep information about the System up-to-date, you should update the data periodically. The data can be updated both automatically and manually.

The data related to a specific section of Management Console is updated automatically when opening that section. You can also set up automatic update of statistic data on violations and violators.

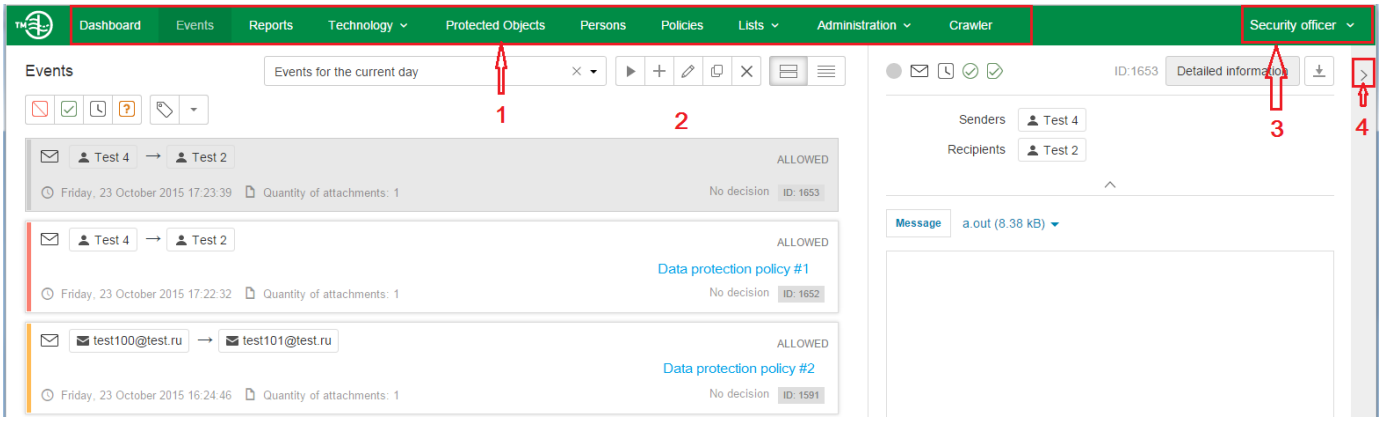
You can also update data manually in any section of the Management Console. To do this, use the standard browser refresh tool: by default the page is refreshed when you press the function key F5).

**Note:**

While downloading the requested data, the System may display a symbol like  or informational message.

# 4 INTERFACE OF TRAFFIC MONITOR MANAGEMENT CONSOLE

All windows of InfoWatch Traffic Monitor Management Console have some common elements.




Window elements of the Management Console:

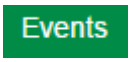
| № on scheme | Console window element | Element purpose |
|---|---|---|
| 1 | Navigation pane | Displays section buttons.<br>Click the section button to go to the selected section of the Management Console. |
| 2 | Working area | Displays elements of a selected Management Console section; is used for managing elements of the selected section. |
| 3 | User menu button | Displays the user name.<br>Click to open a drop-down list were you can:<br>• Change the password for your account (see "Changing User Password")<br>• Change the interface language (see "Selecting Interface Language")<br>• Call Help for system (see "Calling Help File")<br>• Get information on the System (see "Viewing Information on System")<br>• Log out of the Management Console (see "Login and logout of the Management Console") |

| | | |
|---|---|---|
| 4 | Panel hiding button | Is displayed in sections where workspace is divided into panels (for example, the list of events is located on the panel on the left side of the workspace and information about the selected event is located on the panel on the right side).<br>Allows hiding the panel for easier viewing of information on other panels. Clicking the button again (the arrow will point in the opposite direction) recovers the hidden panel. |

Operating the Management Console is performed in thematic sections:

| Section | Purpose |
|---|---|
| Dashboard | Contains statistical information on violations/violators |
| Events | Contains a list of intercepted objects and tools for managing them |
| Reports | Contains a sampling of statistical data on intercepted objects |
| Technologies | Contains a description of analysis technologies being used (categories and terms, text objects, sample documents, etc.) |
| Protected objects | Contains a list of protected objects and tools for managing them |
| Persons | Contains a catalog of persons and workstations of the company IT system, and external contacts. |
| Policies | Contains the list of the alleged actions of employees and algorithm of the System responses |
| Lists | Contains editable catalogs of tags, statuses, and perimeters. |
| Administration | Operations performed in this section are described in *«Infowatch Traffic Monitor. Administration Guide»* |
| Crawler | Contains tools for creating, editing, and running jobs for the Crawler subsystem. |

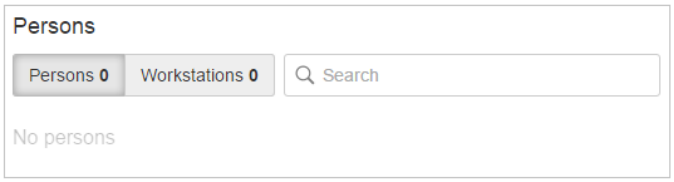
You can go to a specific section by clicking the section button.




**Events** section button

The following interface elements are used in the Management Console:

- **Tab** - allows switching between sets of interface elements within the same window.




**Persons** section, **Persons** and **Workstations** tabs

- **Panel** - a separated interface area displaying a set of data or interface elements.

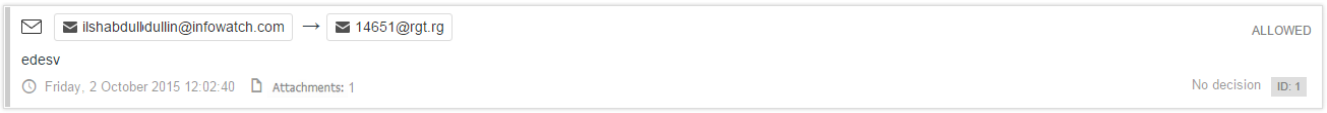
**Note:**

See also:In the System, the *Panel* also refers to the entity of the Dashboard section (see “Dashboards").



Toolbar

- **A part of working area** - working area fragment, separated from other fragments by a vertical line.
- **Tile** - the entire data set for one entry (all object attributes) as a separate object.



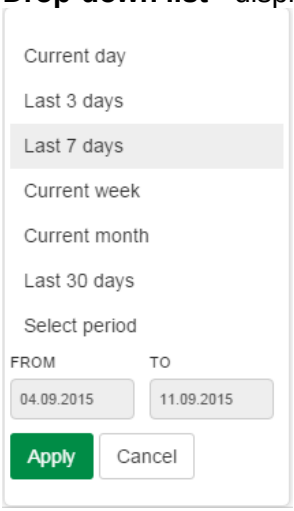

**Events** section, event tile

- **Field** - element to output the string data or for data input from the keyboard or from the Clipboard.




**Search** field

- **Drop-down list** - displays a list of elements when clicked at.




**Dashboard** section, a drop-down list on the widget

You can customize the Management Console interface (for details, see the thematic sections).

**Note:**

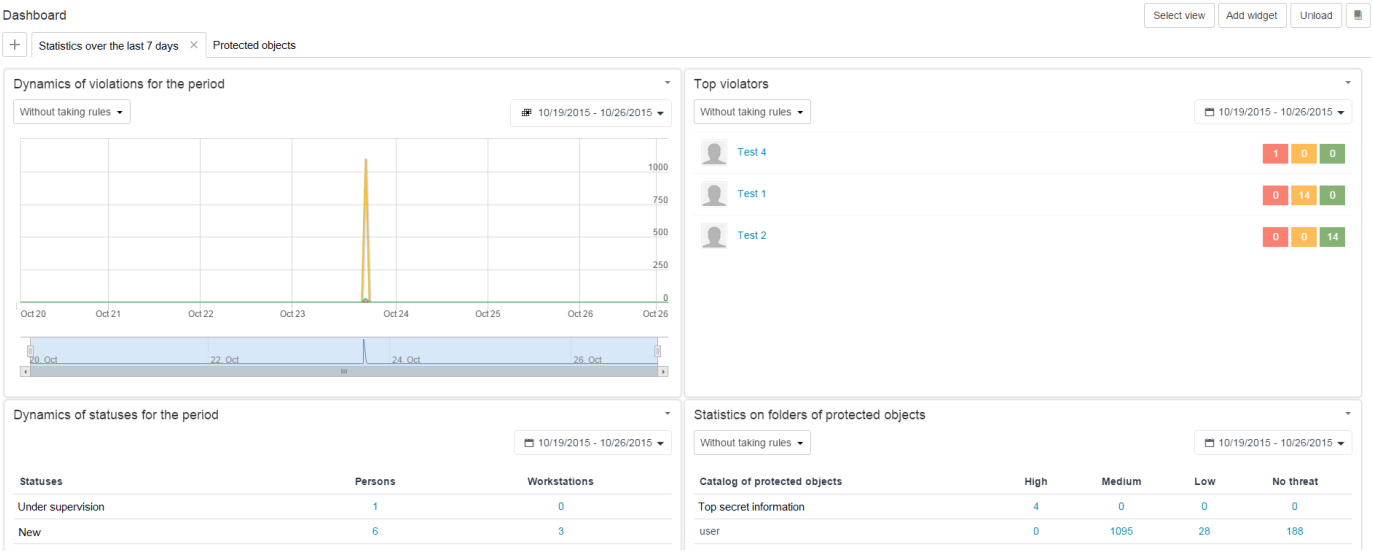
While downloading the requested data, the System may display a symbol like  or informational message.

# 4.1 Dashboard Section

**About the section:**

The section contains statistical information on violations/violators.

Information is displayed on widgets, which are placed on dashboards (tabs).




The section contains the following elements:

| Element | Purpose |
|---|---|
| Widgets | Contains information on violations/violators |
| Dashboards | Contains widgets |
| + **Add dashboard** button | Adds a dashboard |
| **Select view** button | Allows you to choose a method of splitting the workspace into two parts in proportions convenient for the user. Possible choices:<br>- splitting into 3 equal parts<br>- splitting in a ratio of 2:1<br>- splitting into 2 equal parts<br>- splitting in a ratio of 1:2 |
| **Add widget** button | Adds a widget |
| **Unload** button | Dashboard summary on violations/violators (see "Dashboard Summary" - on a summary parameters, and "Summary Creating" - on actions required to generate a summary) |

| Element | Purpose |
|---|---|
| **View the list of summaries** button | Viewing a list of created summaries |

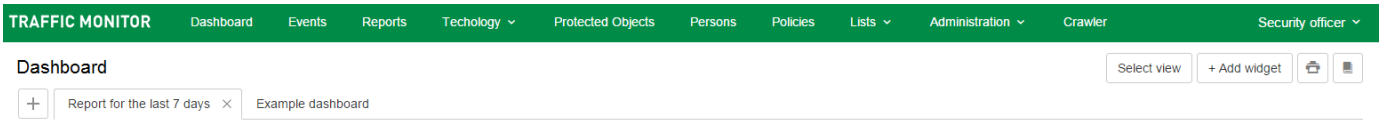
**User's target actions:**

- Configuring dashboards and widgets to display information on violations/offenders (see "Creating Dashboard" and "Creating Widget");
- Viewing information on violations/violators (see "Viewing Events");
- Creating a dashboard summary (see "Managing Summaries").

## 4.1.1 Dashboards

The workspace of the **Dashboard** section contains one or more dashboards which allow you to view statistics on violations and violators.

Panels are designed for ergonomic usage of workspace in the **Dashboard** section.




**Dashboard** section, **Example dashboard** dashboard

Dashboard attributes:

| Parameter | Description |
|---|---|
| Name | Dashboard name |
| View | Data layout on the dashboards |
| Set of widgets | Widgets of the dashboard |

**User's target actions:**

- Creating and configuring dashboards to display information on violations/violators (see "Creating Dashboard" and "Creating Widget")

## 4.1.2 Dashboard widgets

The workspace of the **Dashboard** section contains dashboards used for displaying widgets.

Widgets contain statistical information on violations/violators; appearance and parameters of a widget are defined by its type.

Purpose of different types of widgets and links to their detailed description:

| Widget | Description |
|---|---|

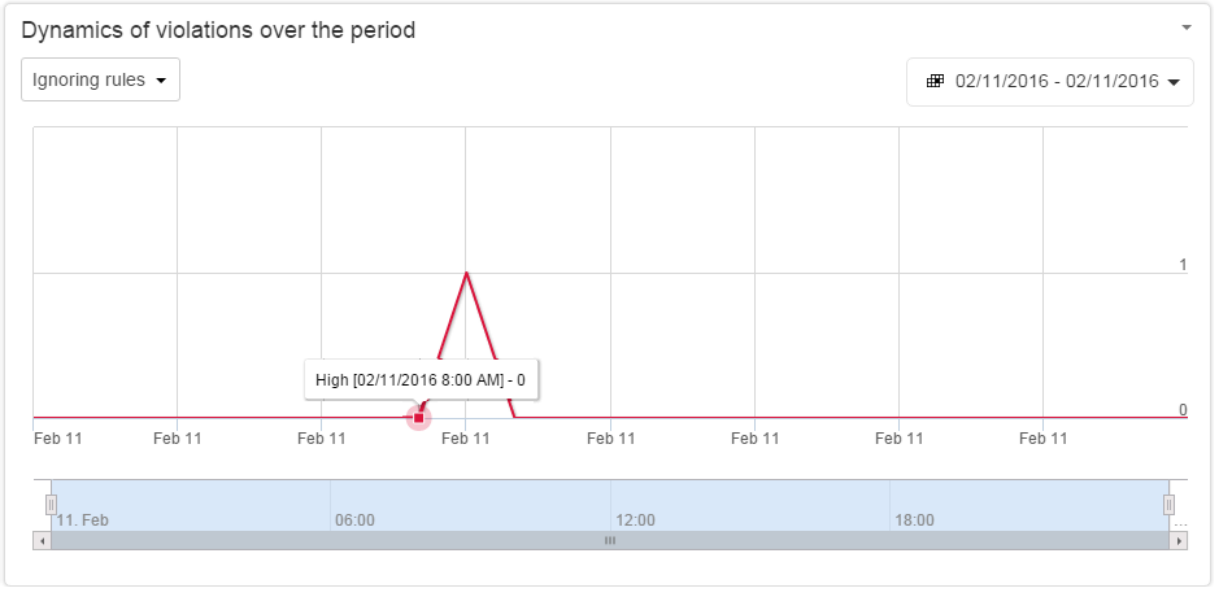
| Widget | Description |
|---|---|
| Dynamics of violations | Quantitative changes of chosen violation types over the selected period |
| Top violators | A list of the most active violators of a chosen group for the selected time period |
| Quantity of threats over period | Number of violations of high, medium, and low level for each violation type (transferring, placement, copying) over selected period |
| Selection | Events for each selection (according to the selected filter) |
| Dynamics of statuses | Dynamics of statuses over selected period |
| Policy statistics | The number of violations per policies broken down bythe rules on transferring, copying and placementover selected period |
| Statistics on protected objects | The number of violations per protected objects broken down by levels of violations over the selected time period |
| Statistics on catalogs of protected objects | The number of violations per catalogs of protected objects broken down by levels of violations over the selected time period |

**User's target actions:**

- Configuring widgets to display information on violations/violators (see "Editing Widget")
- Moving widget tiles (see "Creating Widget")

### 4.1.2.1 Dynamics of violations over the period

The **Dynamics of violations** widget displays the quantitative changes of chosen violation types over the selected period. Data in the widget are grouped by days.




Violations of high, medium and low level are displayed on separate graphs. When hovering the cursor on the graph, markers are displayed in the interception points of time and the number of violations. Clicking on the marker opens the "Events" section, where you can view violations for the chosen day with the chosen violation level and rule type.

Widget parameters:

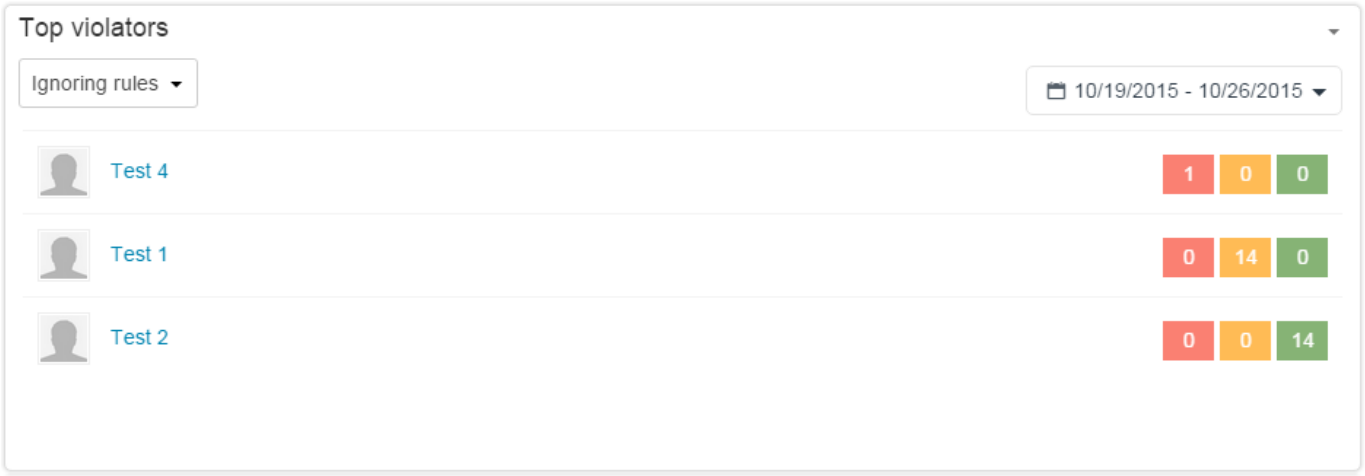
| Parameter | Description |
|---|---|
| Name | Widget name |
| Rules | In the drop-down list in the left upper corner of the widget, select the type of rules, violations of which will be displayed in the widget.<br>Possible values: *Transfer rules*, *Copy rules*, *Placement rules*, *Ignoring rules*. |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed |

**Note:**

To change the widget name and choose the update interval, in the right upper corner click and in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

### 4.1.2.2 Top violators

The **Top violators** widget displays the list of the most active violators broken down to violations of high, medium and low level over a selected time period.




Clicking on the number of violations opens the "Events" section, where you can view the events that meet the conditions specified in the widget settings.

When clicking on the violator's name, the person card is displayed (for identified persons; for details, see "Contact Identification in Event"). To view detailed information on the violator in the "Persons" section, click on the link "Go to person". For not identified violators, the sender's contact is displayed.

Widget attributes:

| Parameter | Description |
|---|---|
| Name | Widget name |

| Parameter | Description |
|---|---|
| Rules | In the drop-down list in the left upper corner of the widget, select the type of rules, violations of which will be displayed in the widget.<br>Possible values: *Transfer rules*, *Copy rules*, *Placement rules*, *Ignoring rules*. |
| Update interval | The frequency of data update in the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |
| Top violators | The number of violators, a summary for which will be displayed |
| Groups | Groups, to which violators can belong. Statistics on the selected groups will be displayed in the widget.<br>Start typing the group name or click + and select desired groups from the list. |
| Statuses | Persons statuses, information on which will be displayed. Start typing the status name or click + and select desired statuses from the list. |

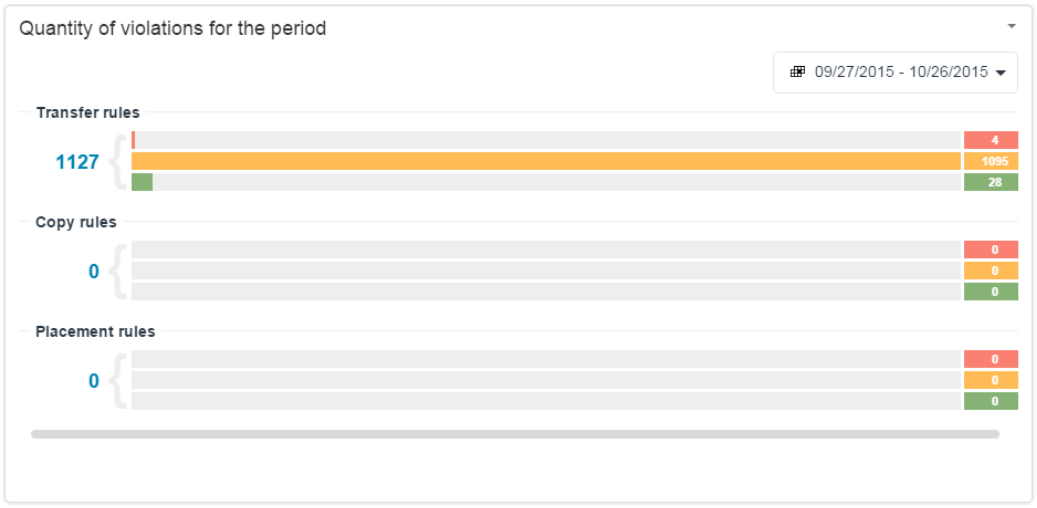
**Note:**

To change the widget name, choose the update interval, groups, and statuses, and specify the number of violators, in the right upper corner click ▾ and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

### 4.1.2.3 Quantity of violations over period

The **Quantity of violations over period** widget displays the number of violations of high, medium, and low level for each rule type (transfer, placement, copying) over a selected period.

Clicking the total number of violations for the selected rule type (highlighted in blue) opens the "Events" section, where you can view violations of a chosen rule type over a selected period.




Widget attributes:

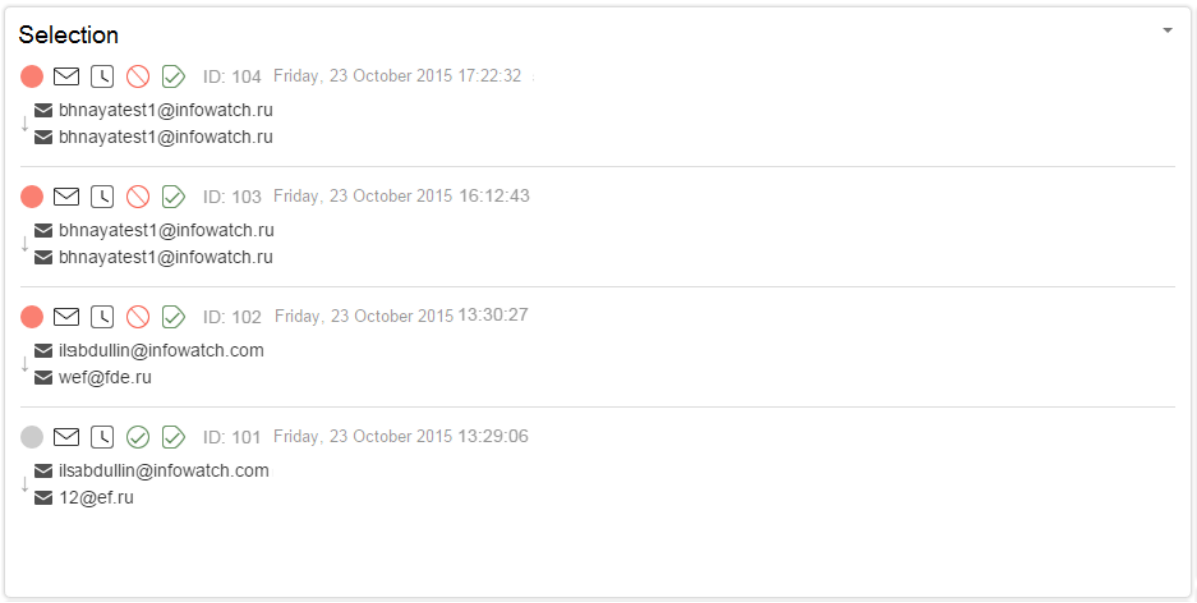
| Parameter | Description |
|---|---|
| Name | Widget name |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |
| View type | Data representation in the widget. Possible values: *Bar chart (horizontal)* and *Table*. |

**Note:**

To change the widget name, choose the update interval and view type, in the right upper corner, click ▾ and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

## 4.1.2.4 Selection

The **Selection** widget displays event tiles for the selection according to the chosen query.




Clicking the event **ID** (highlighted in blue) opens the "Events", where the brief event viewing form is displayed.

To change the widget attributes, in the right upper corner of the widget, click and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

Widget attributes:

| Parameter | Description |
|---|---|
| Name | Widget name |
| Update interval | The frequency of data update in the widget |
| Selection | The query that will be used for selection. Select a required request from the drop-down list (for details, see "Queries") |
| Events per page | The number of events displayed on the page |

**Note:**

When generating a dashboard summary (see "Dashboard Summary"), data of the **Selection** widget is not added to the summary.

## 4.1.2.5 Dynamics of statuses

The **Dynamics of statuses over period** widget displays the changes of person statuses over the selected time period.




Clicking the number of persons or computers (highlighted in blue) opens the "Persons" section (the **Persons** or **Computers** tab respectively), where you can view the list of persons (or computers) that meet the conditions specified in the widget properties.

Widget attributes:

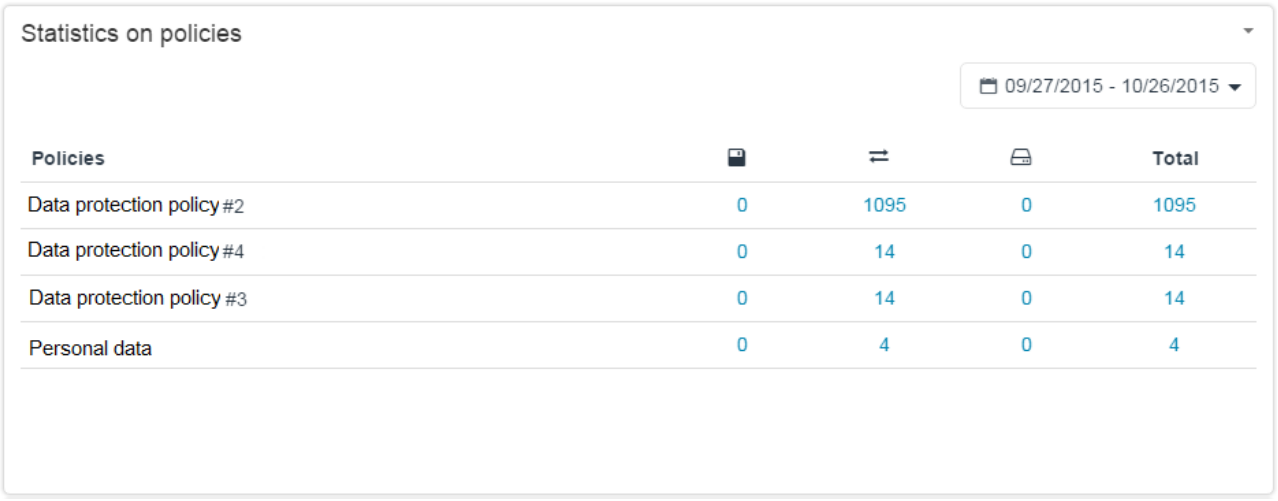
| Parameter | Description |
|---|---|
| Name | Widget name |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |

**Note:**

To change the widget name and choose the update interval, in the right upper corner, click and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

## 4.1.2.6 Policy statistics

The **Policy statistics** widget displays the number of violations by policies broken down by the rules of transfer, copying, and placement over the selected time period.




Clicking the number of violations of transfer, copying, and placement rules (highlighted in blue) opens the "Events" section, where you can view the events that meet the conditions specified in the widget properties.

Widget attributes:

| Parameter | Description |
|---|---|
| Name | Widget name |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |
| Policies | Policies, a summary for which will be displayed. Start typing the policy name or click + and select required policies from the list. |

**Note:**

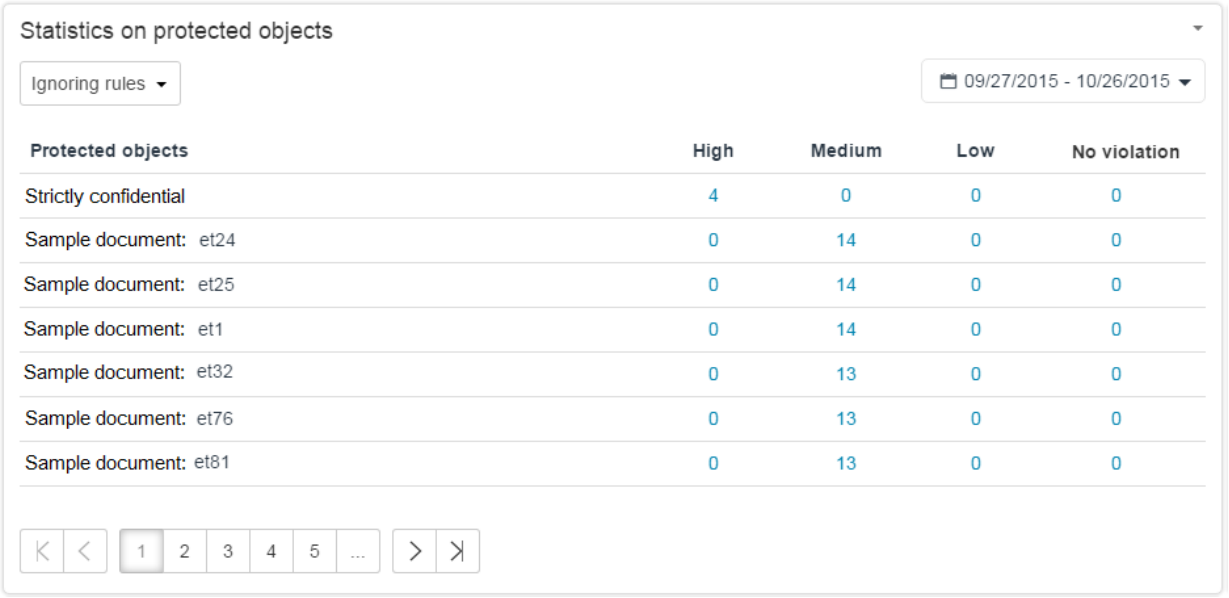
To change the widget name and choose the update interval and policies, in the right upper corner, click

▾

and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

## 4.1.2.7 Statistics on protected objects

The **Statistics on protected objects** widget displays the number of violations per protected objects broken down by violation levels over the selected time period.




The event is displayed in statistics if the event contains any of the specified protected objects and any protected object from specified catalogues including sub catalogues.

Clicking the number of violations for each protected object (highlighted in blue) opens the "Events" section, where you can view the events that meet the conditions specified in the widget properties.

Widget attributes:

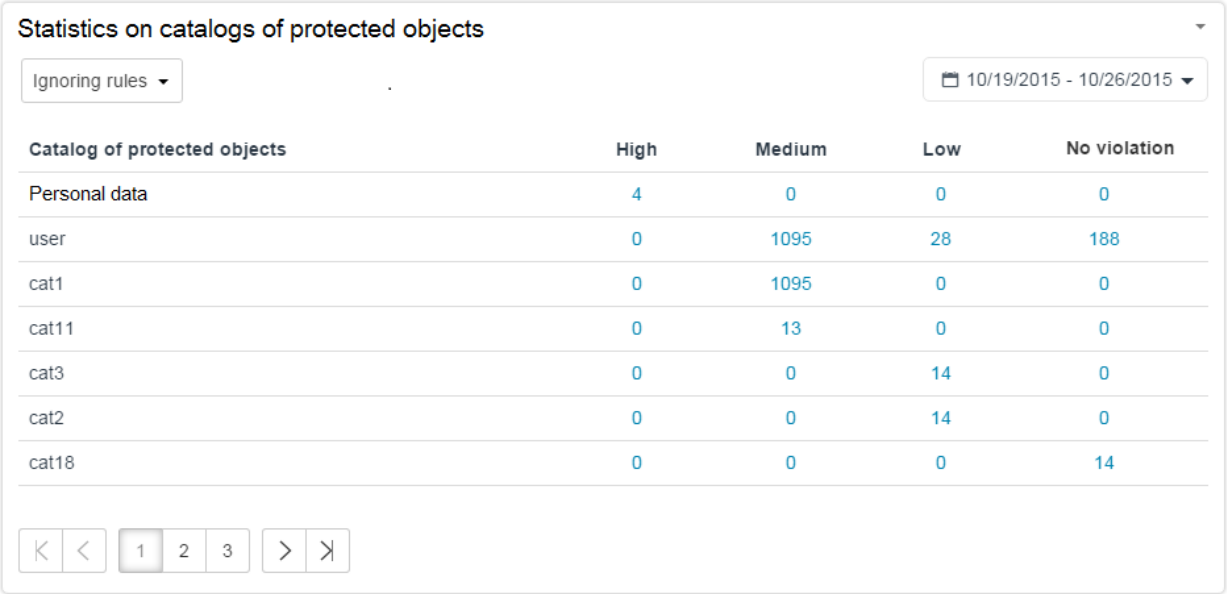
| Parameter | Description |
|---|---|
| Name | Widget name |
| Rules | In the drop-down list in the left upper corner of the widget, select the type of rules, violations of which will be displayed in the widget.<br>Possible values: *Transfer rules*, *Copy rules*, *Placement rules*, *Ignoring rules*. |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |
| Protected objects | Protected objects, statistics for which will be displayed. Start typing the object name or click + and select desired objects from the list. |
| Catalog of protected objects | Catalogue of protected objects, statistics for which will be displayed. Start typing the catalogue name or click + and select desired catalogues from the list. |

**Note:**

To change the widget name, choose the update interval, protected objects, and their catalogues, in the right upper corner click ▾ and, in the drop-down list, select **Edit**. Edit required widget parameters, then click **Save**.

### 4.1.2.8 Statistics on catalogues of protected objects

The **Statistics on catalogues of protected objects** widget displays the number of violations per catalogues of protected objects broken down by violation levels over the selected time period.




The event is displayed in statistics for a selected catalogue if the event contains any protected objects from this catalogue (ignoring sub catalogues).

Clicking the number of violations for each catalogue of protected object (highlighted in blue) opens the "Events" section, where you can view the events that meet the conditions specified in the widget properties.

Widget attributes:

| Parameter | Description |
|---|---|
| Name | Widget name |
| Rules | In the drop-down list in the left upper corner of the widget, select the type of rules, violations of which will be displayed in the widget.<br>Possible values: *Transfer rules*, *Copy rules*, *Placement rules*, *Ignoring rules*. |
| Update interval | The frequency of data update on the widget |
| Period | In the drop-down list in the left upper corner of the widget, specify the time period, over which the data is displayed. |
| Catalog of protected objects | Catalogue of protected objects, statistics for which will be displayed. Start typing the catalogue name or click + and select desired catalogues from the list. |

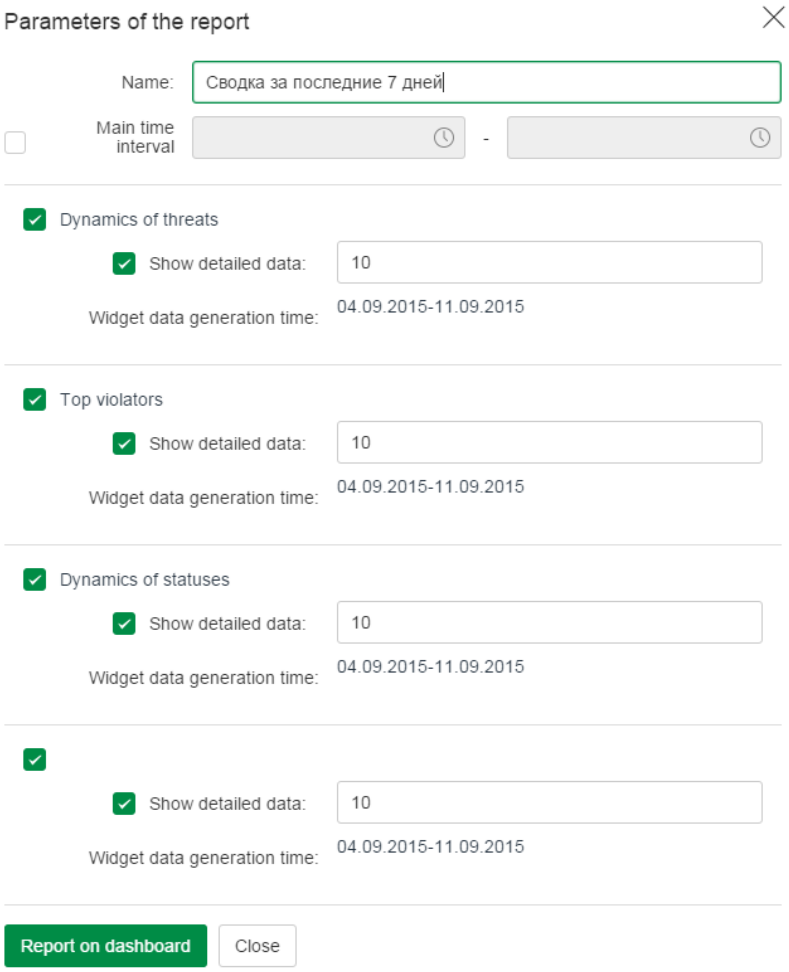
**Note:**

To change the widget name, choose the update interval and catalogues of protected objects, in the right upper corner, click ▾ and, in the drop-down list, select **Edit**. Edit required widget parameters,

then click **Save**.

## 4.1.3 Dashboard summary

Dashboard summary is needed to display statistical data on intercepted objects. The summary can be represented in PDF or HTML format. You can also print it out on your printer.




Summary attributes:

| Parameter | Description |
|---|---|
| Name | Summary name |
| Common period | Select this option if you want to create a summary for all widgets over a common period. Specify the start and the end date.<br>**Note:** By default, a summary for each widget is created over the period specified in the widget settings. |

| Parameter | Description |
|---|---|
| Widget block | Indicates whether data of the widget are included in the summary. By default, the summary is created for all widgets of a dashboard. If you do not want to include data from a particular widget, deselect the checkbox next to its name.<br>**Important!** The summary does not include data from the "Selection" widget. |
| Display detailed data | Select this option if you want the summary to display particular objects. If necessary, change the number of objects to be displayed (by default, 10 objects are displayed).<br>For example, for the "Dynamics of statuses" widget, this option specifies how many persons and computers with each status will be added to the summary. |

**User's target actions:**

- Creating a dashboard summary (see "Managing Summaries").

# 4.2 Events Section

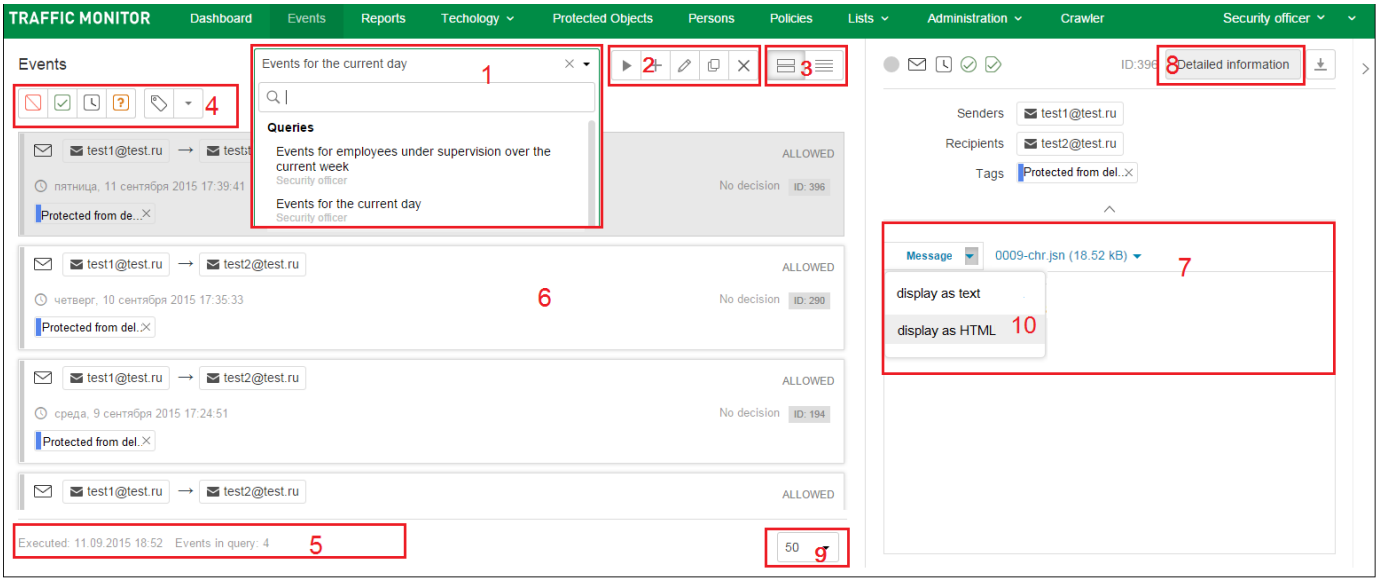
**Reference information:**
Event is the interception object of network traffic.

The System creates events as a result of traffic interception when employees:

- transfer data to other people;
- publish data to publicly accessible sources;
- copy data to external devices;
- print data.

**About the section:**

The section contains a list of events (interception objects) and tools for managing them.
The System may contain a large number of events, so a list of events is displayed according to results of user queries.



**The section contains the following elements:**

| № on scheme | Element | Purpose |
|---|---|---|
| 1 | Drop-down list of queries | Contains a list of available queries used for filtering interception objects (see "Queries")<br>**Note:** for each query, its name and the user who has created this query are specified |
| 2 | Toolbar for working with queries | A set of tools for working with queries |
| 3 | Buttons to select style of event display | Switching between the styles of displaying events:<br> - displaying events as tiles;<br> - displaying events as a table; |
| 4 | Toolbar for events | A set of tools for working with events |
| 5 | Event attributes: execution time and the number of found events | Displays the date of the query execution in the format MM/DD/YY, execution time and the number of found events |
| 6 | List of events | A list of interception objects found as a result of the query execution (see "Object Interception").<br>**Note:** On characteristics of the event tile, see "Event tile" |
| 7 | Brief Event Viewing Form (see “Brief Event Viewing Form") | The most frequently used information on the event (see "Brief Event Viewing Form") |
| 8 | Detailed information on the event (see "Detailed Event Viewing Form") | Complete information on the event |
| 9 | Drop-down list with the number of records on the page | Allows you to choose the number of events to be displayed |
| 10 | Event viewing mode (only for messages with HTML markup) | Allows you to choose the event viewing mode. Possible values:<br>**display as text** - is used for displaying message text without formatting. Allows viewing hidden text (for example, white text or text contained in the picture name);<br>**display as HTML** - allows viewing pictures, tables, and text markup. |

**User’s target actions:**

- Filtering events (see "Creating Queries");
- Viewing events (see "Viewing Brief Event Form" and "Viewing Detailed Event Form");
- Making decision on an event (see "Making Decision on Object");
- Adding/removing a tag of event (see "Adding and Deleting Tags");
- Saving an event (see "Saving Events (for SMTP mail)");
- Dispatching a blocked event (see "Dispatching Blocked Event");
- Exporting events (see "Event Export");
- Viewing contacts of senders and recipients in events ("Identifying Contacts in Event").

## 4.2.1 Queries

Objects checked by System are stored in the database To view information about these objects in the Management Console, you need to create and execute the query.

The query is a selection of intercepted objects according to specified conditions.

There are two query creation modes: standard (allows you to select desired conditions from the list) and advanced (enables more flexible setting of search options).

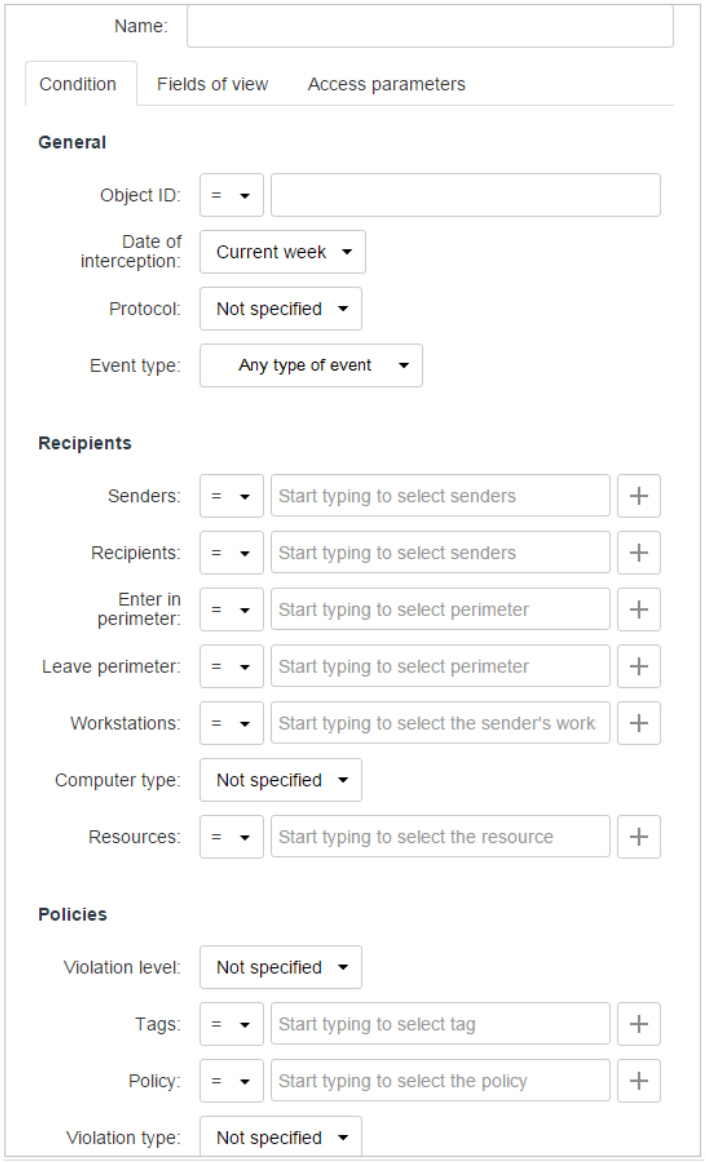
The query creation form contains the following tabs:

| Element | Purpose |
|---|---|
| Condition | On this tab you can specify criteria of search |
| Display fields | On this tab you can choose fields to be displayed in event records |
| Access parameters | On this tab you can configure access to the query and make it available to the owner only |

**User's target actions:**

- configuring parameters of the query (see "Creating queries");
- defining fields of view (see "Choosing event fields of view").

#### 4.2.1.1 Condition




**Events** section, **Condition** tab for a selected query

The query attributes:

| **Parameter** | **Description** |
|---|---|
| = | Parameter of attribute equality |
| ≠ | Parameter of attribute negation |
| Date of interception | The date when the event was created. By default events for the current week will be displayed. |
| Object ID | Unique identifier of the event. Multiple values may be specified, separated by commas. |

| | |
|---|---|
| Event type | Specifies that the event belongs to a particular interceptor.<br>Event types are grouped by category. When selecting a category, all event types of this category will be displayed. Possible values:<br>• Internet activity:<br>- Web-message<br>• File sharing:<br>- FTP<br>- External device (copying files to network resources also belongs to this event type)<br>• Printers and MFPs<br>- Print<br>• Multimedia recording<br>- Photography<br>• Storage<br>- Crawler<br>• Email<br>- Email<br>- Webmail<br>• Messenger<br>WhatsApp<br>- Yahoo!<br>-MS Lync<br>- ICQ<br>- XMPP<br>- MMP<br>- Skype<br>• Cellular communication<br>- SMS |
| Protocol | Protocol through which the traffic is transferred |
| Senders | The list of object senders |
| Recipients | The list of object recipients |
| Entered perimeters | Perimeter the object recipient belongs to |
| Left perimeters | Perimeter the object sender belongs to |
| Computer | The computer from which the object was sent |
| Computer type | Type of computer from which the object was sent. Possible values:<br>• computer<br>• mobile device<br>• terminal server |

| | |
|---|---|
| Resources | Internet resource or a group of resources (see "List of resources"). Start typing and choose the desired resource or group from the list of suggestions.<br>**Note**: If you want to specify a particular resource, choose icon (for example, facebook.com) |
| Violation level | The level of violation of the corporate security policy. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Tags | Tags assigned to the object (see "Tags") |
| Policy | List of policies triggered on the object |
| Violation type | Type of rule that was violated. Possible values: *Violation of transfer*, *Violation of copy*, *Violation of placement*. |
| User decision | Decision the user made for the object. Possible values: *Violation*, *No violation*, *No decision*, *Requires additional processing*. |
| Verdict | The verdict passed by the System on the object. Possible values: *Allowed*, *Blocked*, *Quarantine*. |
| Task name | Name of the scanning task. |
| Date of task start | The date when the task was started |
| Type of scanning source | Type of the location where the object was found. Possible values:<br>• Shared network resources<br>• Local drives of workstations<br>• SharePoint file storage |
| Attachment name | The name of the object attachment. Both file name and extension must be specified.<br>**Note**: If the attachment name contains a comma, the comma must be screened with \. For example, the 'test1,2.txt' attachment name should be specified as 'test1\,2.txt'. |
| Attachment format | Attachment format. You can select multiple values from the list. |
| Encrypted file | Whether the attachment is encrypted or not |
| Path to file | File source |
| File creation date | Attachment creation date |
| File modification date | Attachment modification date |
| Attachment size | Size of the attached file. You can specify a minimum or maximum file size or both parameters. |

| | |
|---|---|
| Event text | Specify the search text. Search results will include events whose text contains all listed words regardless of their location and order, letter case and morphology. Search is performed through all the event contents. Wildcards ("*", "?") are not supported.<br>When the condition is denied, events whose text contains all specified words will be excluded from search results.<br>**Note:** Search results will contain only those events that have already been indexed at the moment of the query execution. Indexing of events is performed every ten minutes, however under a heavy load on the server, this interval may increase. |
| Analysis results | Elements of technologies included in protected objects that were triggered on events |
| Protected objects | List of triggered protected objects |

When adding or editing conditions, you can specify positive or negative parameters of the query:

- For a required attribute to be included in search results, set the equality parameter  next to it.
- For a required attribute to be excluded from search results, set the negation parameter  next to it.

Equality or negation parameter can be set for the following attributes:

- Object ID
- Senders
- Recipients
- Entered perimeters
- Left perimeters
- Sender's workstation;
- Resources
- Tags
- Policy
- Attachment name
- Attachment format
- Event text
- Results of analysis
- Protected objects

If a negation parameter is applied to an attribute with multiple values, then events that contain specified values will be excluded from search results. For example, if `user1@example.com` and `user2@example.com` users are specified as Senders, then events with the sender `user1@example.com` or `user2@example.com` will be excluded from search results.

For **Senders**, **Recipients**, **Computers** (computer name or IP address), **Resources**, **Task name**, **Attachment name** and **Path to file** attributes, you can specify values using wildcards:

- ? - for a separate character

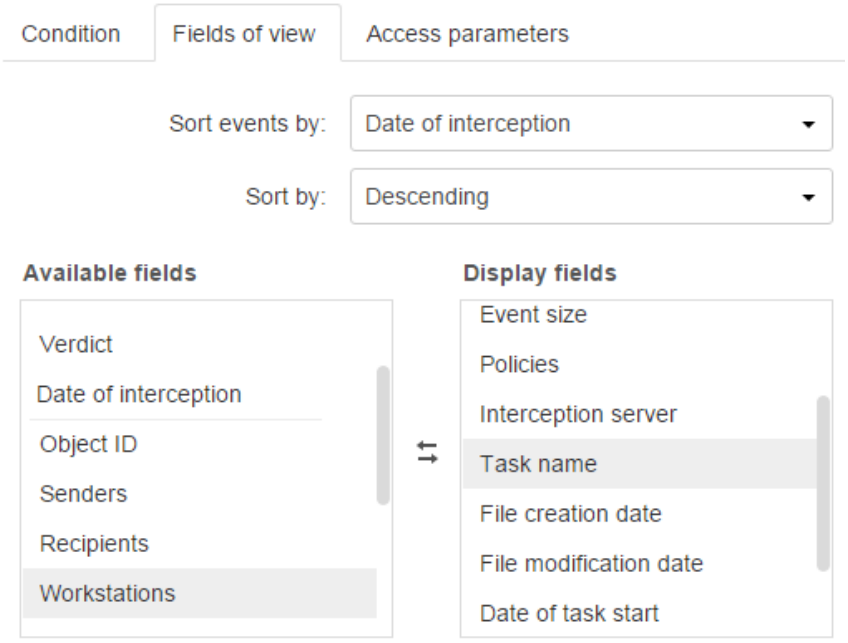
- * - for a number of characters.

**User's target actions:**

- Creating a standard query (see "Query Creation in Standard Mode")
- Creating an advanced query (see "Query Creation in Advanced Mode")

### 4.2.1.2 Displayed Fields

The left field contains the list of available event attributes, and the right one contains event attributes that will be displayed in a table view and unloaded to the export file in `.xslx` format. If there are no selected attributes, then both the table view and the unloading will contain all attributes.

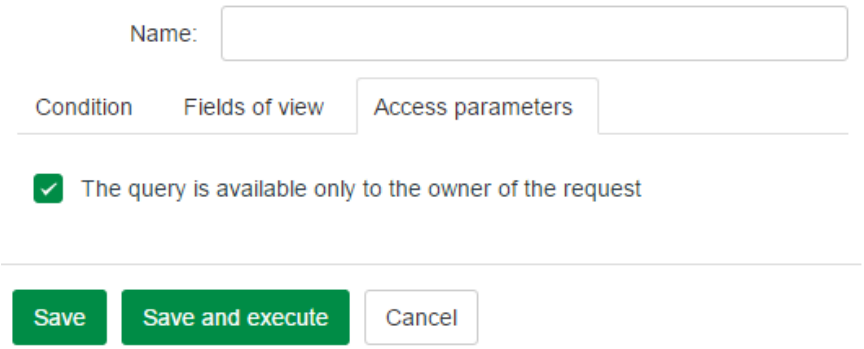



**Events** section, **Displayed fields** tab for a selected query

**User's target actions:**

- Specifying the fields that will be displayed in the event information (see "Choosing event fields of view")
- Exporting events (see "Unloading event")

### 4.2.1.3 Access Parameters




**Events** section, **Access parameters** tab for a selected query

**To forbid viewing and editing the query by other users:**

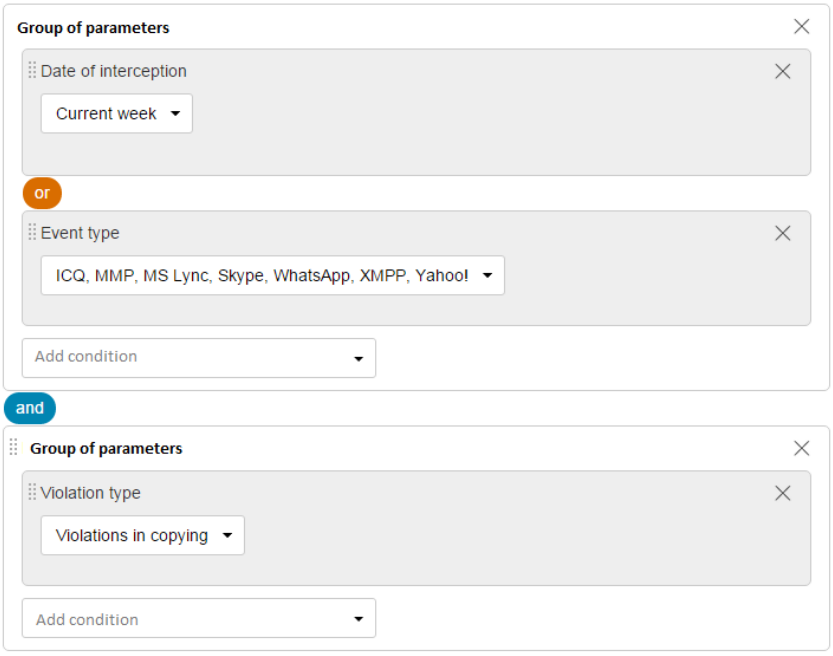
1. Select the check box **The query is available only to the owner**.
2. Click **Save**.

**To permit viewing and editing query by other users:**

1. Clear the check box **The query is available only to the owner** (by default, the check box is selected).
2. Click **Save**.

### 4.2.1.4 Advanced Mode

The advanced mode is intended for more flexible adjustment of the query parameters.




The following elements are used for creating a query:

- A list of event attributes. This is a set of attributes assigned to the intercepted object
- *Group of parameters* element. This is a container intended for a logical separation of query parts

- = – a parameter of attribute equality. Indicates that events will be filtered with respect to the presence of the attributes to which this parameter is assigned;
- ≠ – a parameter of attribute negation. Indicates that search results will not contain events to which this parameter is assigned.

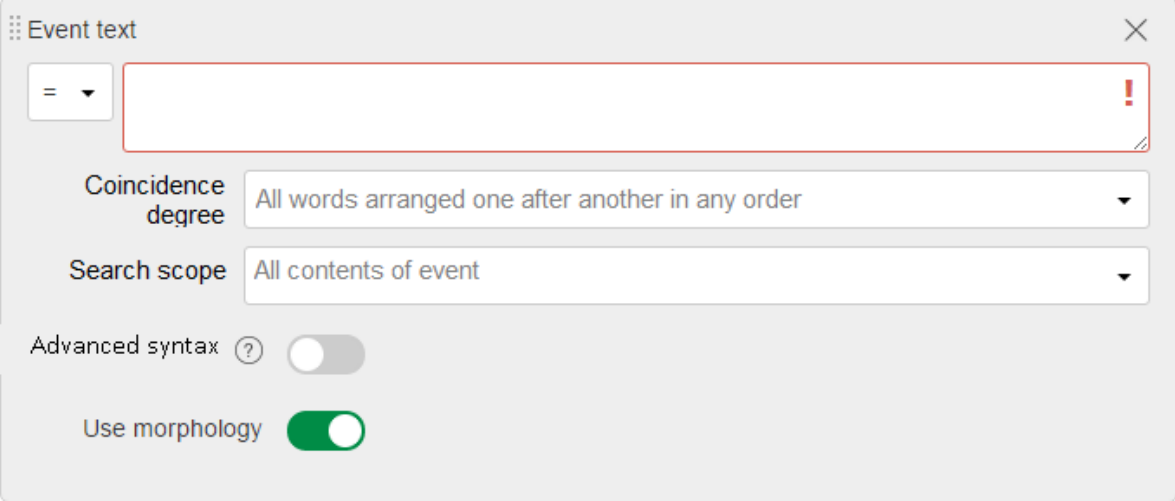
In the advanced mode, you can also perform a flexible search on the text of events.

**User's target actions:**

- Configuring an advanced query (see "Query Creation in Advanced Mode")

### 4.2.1.5 Search on the Event Text

When creating a request in the advanced mode, you can specify conditions of search on the event text.




Full-text search parameters:

| Parameter | Description |
|---|---|
| Condition | Parameter of attribute equality. Possible values:<br>= - indicates that filtering results will contain events with attributes for which this parameter has been assigned;<br>≠ - indicates that events with attributes for which this parameter has been assigned will be excluded from search results. |

| Parameter | Description |
|---|---|
| Coincidence degree | Specify the required coincidence degree:<br>• **All words arranged one after another in a specified order** - search results will include events whose text contains all listed words arranged in the specified order.<br>If the condition is negated, search results will include events whose text does not contain listed words arranged in the specified order.<br>• **All words arranged one after another in any order** - search results will include events whose text contains all listed words in any order.<br>If the condition is negated, search results will include events whose text does not contain listed words irrespective of their order.<br>• **All words irrespective of their order and distance between words** - search results will include events whose text contains all listed words irrespective of their order and distance between words.<br>If the condition is negated, search results will include events whose text does not contain listed words or contains not all of them.<br>• **At least one of specified words** - search results will include events whose text contains, at least, one of the listed words.<br>If the condition is negated, search results will include events whose text does not contain any specified word. |
| Search area | Specify the area in which the search will be performed:<br>• **All contents of event** - search on all contents of the event will be performed.<br>• **Message text** - search on the message text and message subject will be performed.<br>• **Message subject** - search on the message subject will be performed.<br>• **Attachment** - search on the attachments text and file names will be performed.<br>• **File name** - search on the attachment file names will be performed. |
| Advanced syntax | Enable this setting if you want to specify the sought-for text using boolean operators. For details, see "Using advanced syntax". |
| Use morphology | If this setting is disabled, search results will include only those events which contain the sought-for words in a specified grammar form.<br>**Note:** The **Use morphology** option is available only if the construction of the morphological index is enabled in database settings. For detailed information on this setting, please see the document *"Traffic Monitor. Administration Guide".* |

Please note that:

- Words must be divided with spaces.
- Search in not case-sensitive.
- Using wildcards ("*", "?") is not supported.

**Note:**

Search results will contain only those events that have already been indexed at the moment of the query execution. Indexing of events is performed every ten minutes, however under a heavy load on the server, this interval may increase.

**User's target actions:**

- Configuring an advanced query (see "Query Creation in Advanced Mode").

## 4.2.2 Object Interception

The list of events displays intercepted objects which confirm query conditions.

Information on the event is presented in following ways:

- the event tile (or the table entry) contains general information about the event;
- the short form viewing event displays the most commonly required information;
- the detailed event viewing form displays complete information about the interception object.

Attributes of interception objects:

| Element | Description |
|---|---|
| Object ID | Event unique identifier in the System |
| User decision | Decision the user made for the event. Possible choices:<br>• *No decision*;<br>• *Violation*;<br>• *No violation*;<br>• *Requires additional proceeding*. |

| Element | Description |
|---|---|
| Event type | The source of actions which led to the event creation. Possible choices:<br>•  - Internet activity (post requests to Web resources);<br>•  - File exchange (copying files to an external device or to a shared folder, transfer via FTP);<br>•  - Printer and MFP (sending files to print);<br>•  - Recording media (sending or receiving photos);<br>•  - Email (sending and receiving electronic data via email and webmail);<br>•  - Messenger (sending or receiving messages through Skype, Mail.ru Agent (MMP), MS Lync, ICQ(OSCAR), XMPP, WhatsApp);<br>•  - Cellular communication (sending or receiving messages via SMS);<br>•  - File storage (in SharePoint 2007/2010/2013 file storage, shared network resources and on local drives of workstations). |
| Sending date | Date and time when a mail server received the mail (only for e-mails) |
| Senders | The list of traffic senders |
| The sender's computer | The name of the computer from which traffic was sent. |
| Recipients | The list of traffic recipients |
| Policies | List of policies triggered on analysis of this event |
| Categories | List of categories assigned to this event |
| Protected objects | List of protected objects triggered for this event |
| Elements of analysis | The list of elements of analysis contained in the triggered protected object |
| Website topic | Type of inappropriate resources visited by the employee |
| Tags | List of tags assigned to this object |
| Date of interception | Date and time when traffic was intercepted by the System |
| Insert date | Date and time when the event was saved into the Database |

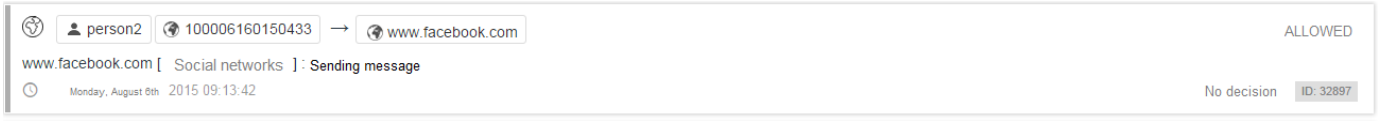
| Element | Description |
|---|---|
| Size | Size of event (in bytes) |
| Violation level | Characteristics of the violation assigned to the event. Possible choices:<br>• *None* - is marked with a gray (■) color on the tile;<br>• *High* - is marked with a red (■) color on the tile;<br>• *Medium* - is marked with an orange (■) color on the tile;<br>• *Low* - is marked with a green (■) color on the tile |
| Delivery status | Indication of whether the message was delivered (only for SMTP messages when the System operates in the “inline” mode. See the document “*Infowatch Traffic Monitor. Installation Guide*"). Possible choices:<br>• *Pending*;<br>• *Successfully delivered*;<br>• *Failed*;<br>• *Delivery Attempt Failed*;<br>• *Blocked* |
| Verdict | The conclusion which the System assigned to the object as a result of analysis (see "Object analysis and verdict"). Possible choices:<br>• *Allowed* (  )<br>• *Blocked* (  )<br>• *Quarantined* (  )<br>**Note:**<br>Events with *Deleted* verdict are deleted from the System and are not displayed in the Management Console. |
| Interception server | The name of the server which intercepted the object. |

See also:

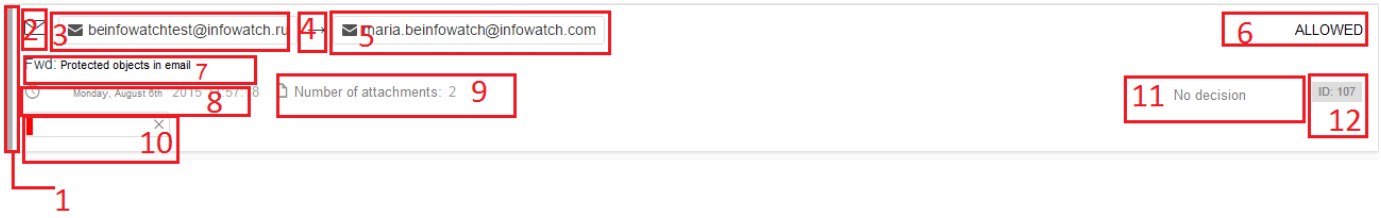
- "Event Tile" - on presenting the event and its attributes.
- "Brief Event Viewing Form" - on displaying general information about the event.
- "Detailed Event Viewing Form" - on displaying advanced information about the event.

### 4.2.2.1 Event tile

The event tile looks like following:



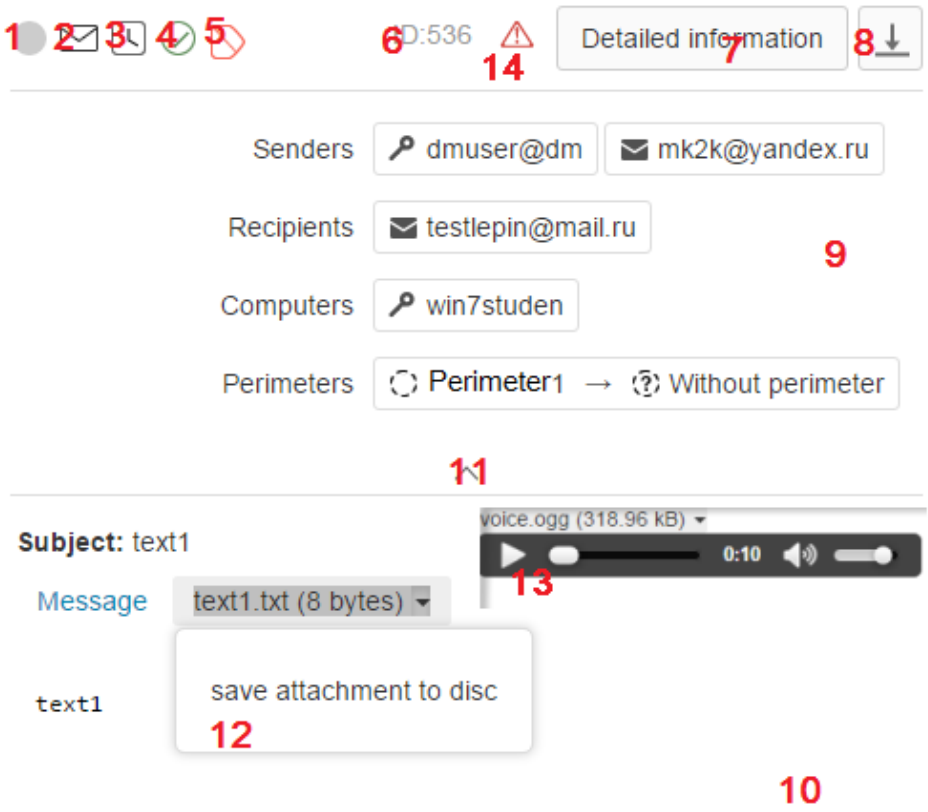

It consists of the following elements:




where
1 - Color of violation level. Possible values: *High*, *Medium*, *Low*, *No violation*.
2 - Event type. Possible values: *Web message*, *FTP*, *External device*, *Print*, *Photo*, *Crawler*, *Email*, *Webmail*, *WhatsApp*, *Yahoo!*, *MS Lync*, *ICQ*, *XMPP*, *MMP*, *Skype*, *SMS*.
3 - Sender (the list of senders)
4 - Traffic direction
5 - Recipient (the list of recipients)
6 - Verdict. Possible values: *Allowed*, *Blocked*, *Quarantine*.
7 - Event preview (brief information on how the event appeared: in the first example, the reason is sending a message in a social network, in the second one - sending a letter)
8 - Event creation date
9 - Attachment indicator
10 - Assigned tags (see "Tags")
11 - User decision. Possible values: *Violation*, *No violation*, *No decision*, *Requires additional processing*.
12 - Object ID

### 4.2.2.2 Brief Event Viewing Form

A brief event viewing form is displayed in the right part of the workspace when you select an event in the list.




**Events** section, a brief viewing form for a selected event

A brief event viewing form contains the following entities:

| № on scheme | Entity | Description |
|---|---|---|
| 1 | Violation level | Displays a color indicator for the **Violation level** attribute. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| 2 | Icon of event type | Displays an icon of the event type. Possible values: *Web message*, *FTP*, *External device*, *Print*, *Photo*, *Crawler*, *Email*, *Webmail*, *WhatsApp*,*Yahoo!*, *MS Lync*, *ICQ*, *XMPP*, *MMP*, *Skype*, *SMS*. |
| 3 | User decision | Displays the value of the **User decision** attribute. Possible violations: *Violation*, *No violation*, *No decision*, *Additional processing is required* |
| 4 | Verdict | Displays the value of the **Verdict** attribute. Possible values: *Allowed*, *Blocked*, *Quarantine*. |
| 5 | Sending status | Displays the value of the **Sending status** attribute. Possible values: *Sent*, *Not sent*, *Waiting for sending*. |
| 6 | Object ID | Displays the value of the **Object ID** attribute |
| 7 | Button for opening a detailed event viewing form | Allows you to view additional information on the event |

| № on scheme | Entity | Description |
|---|---|---|
| 8 | Button for saving event | Button that allows you to save the event to disk (see "Saving Events"). The button is displayed for SMTP messages only. |
| 9 | Area with event parameters | Shows event parameters such as *Senders*, *Recipients*, *Computers*, *Perimeters*, etc.<br>**Note**: The set of parameters may vary depending on the event type. |
| 10 | Area with event contents | Displays the contents of the event: email texts, attachments, voice messages. |
| 11 | Button that shows/hides event parameters | Allows you to hide the area with event parameters. To restore the area, click  |
| 12 | **Save attachment to disk** command | Allows you to save attachments to your computer |
| 13 | Tools for working with intercepted voice messages in Skype | Allows you to listen to the intercepted voice message and save the file to your computer.<br>To save the file, click  **save attachment to disc** |
| 14 | Indicator of errors | Is displayed if some errors occurred while processing the event. You can view detailed information on the errors in the detailed event viewing form. |

**Note:**

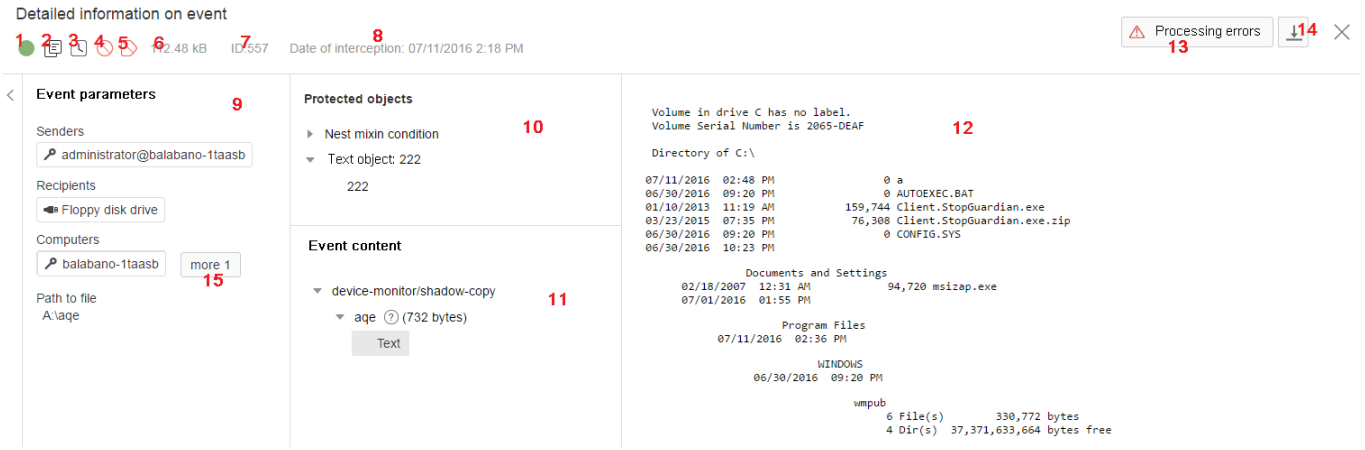
The set of objects in the brief event viewing form may vary depending on extracted attributes.

**User's target actions:**

- Getting acquainted with general information on the event (see "Viewing Brief Event Form")

### 4.2.2.3 Detailed Event Viewing Form

A detailed event viewing form for a selected event opens when you click **Detailed information** in the brief event viewing form (see "Brief Event Viewing Form").




**Events** section, a detailed viewing form of the selected event

The Detailed Event Viewing Form contains the following information on the event:

| № on scheme | Form element | Description |
|---|---|---|
| 1 | Violation level | Displays a color designation of the **Violation level** attribute. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| 2 | Event type | Displays the value of the **Event type** attribute. Possible values: *Web message*, *FTP*, *External device*, *Print*, *Photo*, *Crawler*, *Email*, *Webmail*, *WhatsApp*, *Yahoo!*, *MS Lync*, *ICQ*, *XMPP*, *MMP*, *Skype*, *SMS*. |
| 3 | User decision | Displays the value of the **User decision** attribute. Possible values: *Violation*, *No violation*, *No decision*, *Additional processing is required*. |
| 4 | Verdict | Displays the value of the **Verdict** attribute. Possible values: *Allowed*, *Blocked*, *Quarantine*. |
| 5 | Sending status | Displays the value of the **Sending status** attribute. Possible values: *Sent*, *Not sent*, *Waiting for sending*. |
| 6 | Size of event | Displays the value of the **Size of event** attribute |
| 7 | Object ID | Displays the value of the **Object ID** attribute |
| 8 | Interception date | Date and time of object interception |
| 9 | **Event parameters** block | Includes such event parameters as *Senders*, *Recipients*, *Computers*, *Perimeters*, etc. **Note**: The set of parameters may vary depending on the event type. |

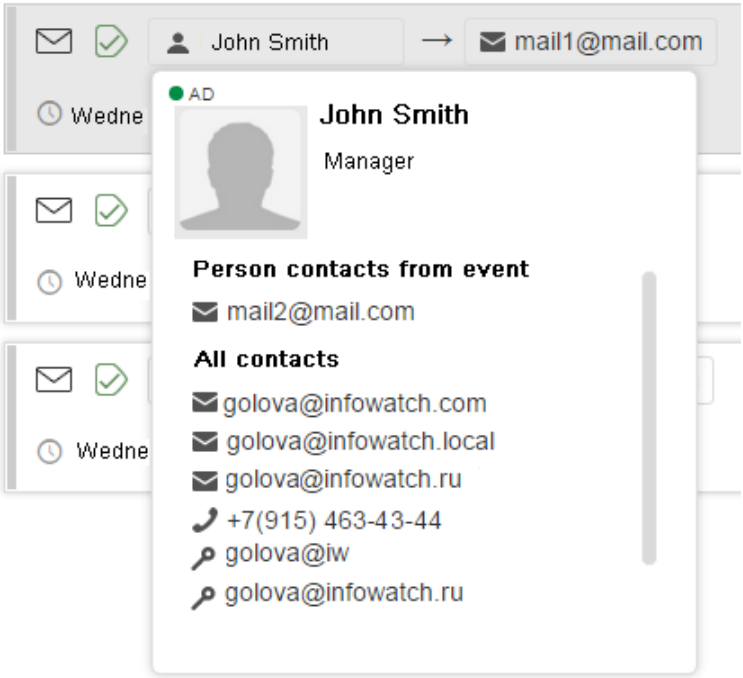
| № on scheme | Form element | Description |
|---|---|---|
| 10 | **Protected objects** block | The list of triggered protected objects and elements of technologies that are included in these protected objects. Click the protected object or the element of technologies to view detailed information in the right part of the form (№ 12 in the picture). The following information is displayed:<br>• the number of detected elements of technologies;<br>• a catalog the protected object belonged to at the moment of interception (clicking the catalog name opens the catalog in the "Protected Objects" section). |
| 11 | **Event content** block | Displaes the event content: email text, attachments, voice messages. To view detailed information, click the desired element. The detailed information is displayed in the right part of the form (№ 12 in the picture). For example, for the *Email* type of event, you can view message text or attached images. |
| 12 | Viewing area | Displays additional information when you select a protected object or an element of technologies in the **Protected objects** block (№ 10 in the picture) or select an element in the **Event content** block (№ 11 in the picture). |
| 13 | **Processing errors** button | Clicking this button opens the **Processing messages** window with system messages on the stages of object processing and errors that occurred during the processing |
| 14 | Button for saving event | Button that allows you to save the event to disk (see "Saving Events").<br>The button is displayed for SMTP messages only. |
| 15 | Button for expanding the list | The button appears if there are few elements in the list. Click this button to view the whole list. To collapse the list, click  (is displayed when you expand the list). |

**User's target actions:**

- Getting acquainted with detailed information about the event (see "Viewing Detailed Event Form")

## 4.2.3 Contact Identification in Event

Based on data extracted from event, the System determines traffic senders and recipients (persons, groups of persons, and computers). This process is called contact ***identification***. For identified senders and recipients, a name of the person, group or computer is displayed on the event tile. Clicking this name opens the sender or recipient card. The card contains contacts extracted from the event as well as contact data which are stored in the System.



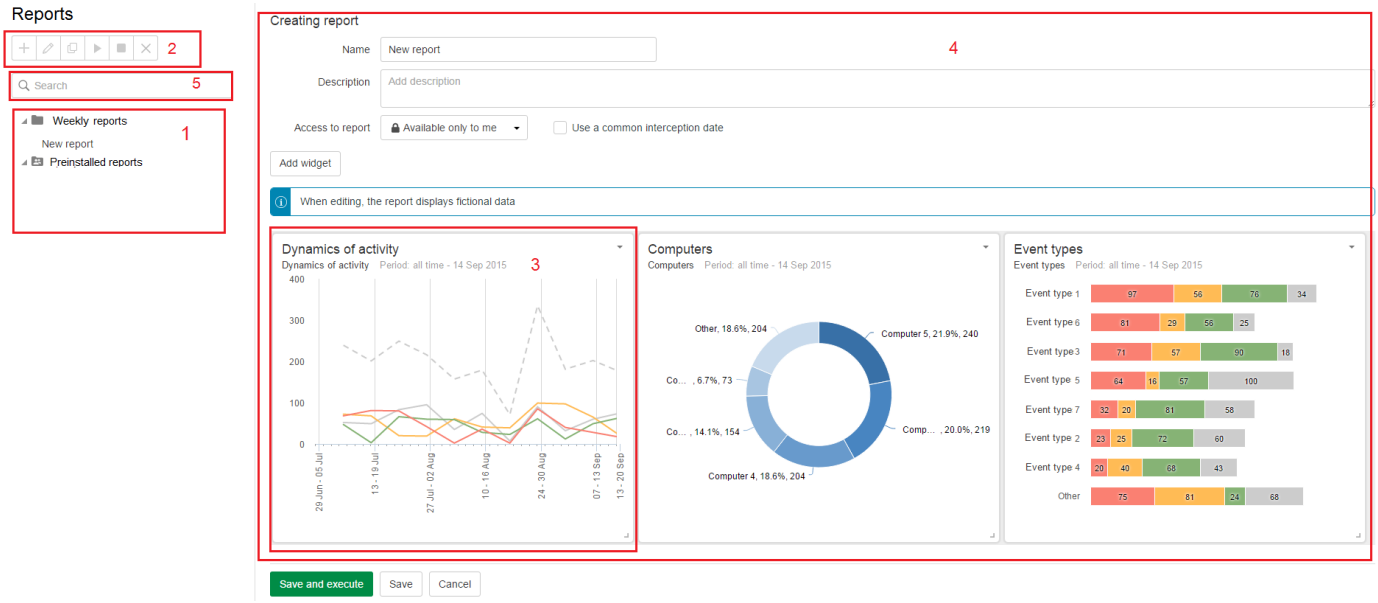

If during processing an event, the System detects new private contacts of a person, detected contacs are added to the person card automatically. The process of automatic adding new contacts to existing persons is called ***post identification***. As a result of post identification, such data as email address, mobile phone, accounts in messengers (ICQ, Skype) and social networks can be added to a person card.

## 4.3 Reports Section

**About the section:**

Contains a sampling of statistical data on intercepted objects.

Statistical data is displayed on widgets in the form of charts and diagrams. Each report can contain one or more widgets.




The section contains the following elements:

| № on scheme | Element | Purpose |
|---|---|---|
| 1 | Drop-down list of folders with reports | Contains the list of folders in which the available reports are grouped |
| 2 | Toolbar for reports | Set of tools for working with reports |
| 3 | Report widgets | Contain a graphical representation of statistical data on intercepted objects |
| 4 | Report creation or edit window | Contains report parameters and added widgets |
| 5 | Search field | Start typing to search for reports and folders by their names |

The **Preinstalled reports** folder contains the following reports:

| Report | Description |
|---|---|
| Statistics on activity over the last 7 days | Displays information on the number of events intercepted by the System, the most active senders and recipients, as well as the most popular content routes between senders and recipients |
| Activity on the Internet over the last 7 days | Displays Internet resources to which the company employees send requests most frequently |
| Transfer of secured data over the last 7 days | Displays protected objects contained in events intercepted by the System and the information security policies applied to the events |

Preinstalled reports are available to all users of the System.

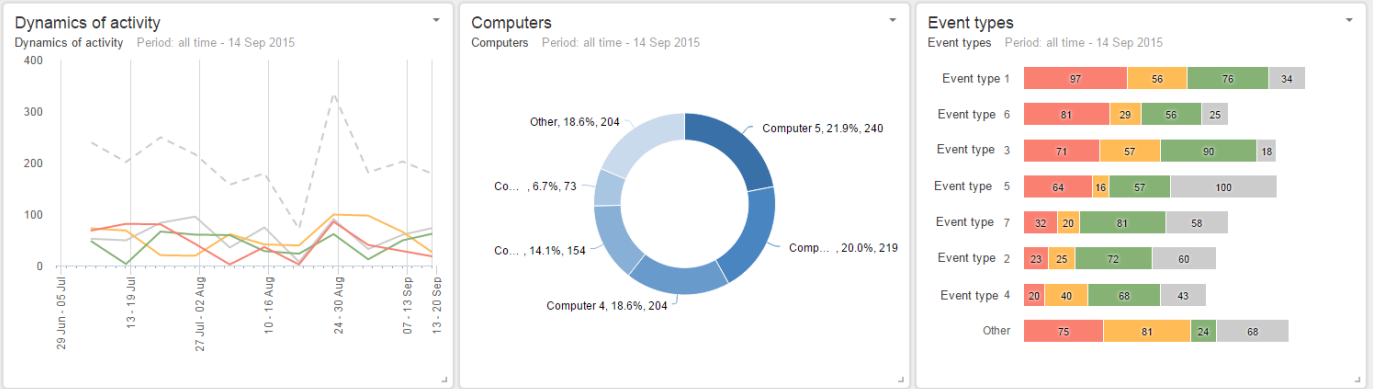
**User's target actions:**

- Creating report
- Customizing widgets to display statistical information

- Creating folder with reports
- Working with ready reports

## 4.3.1 Widgets of Reports

The workspace of the **Reports** section contains widgets.




Widgets of the **Reports** section

Widgets are designed to display statistical information on intercepted objects for a specified period of time.

Widgets can be created for the following data:

| Type of statistics | Description |
|---|---|
| Web resources | Web resources to which the company employees sent requests most frequently |
| Dialogs | Routes of transferring messages (irrespective of direction) for which the System registered the largest number of events |
| Dynamics of activity | Dynamics of the number of events intercepted by the System |
| Catalogues of protected objects | Catalogues of protected objects which are most frequently encountered in data intercepted by the System |
| Computers | Computers for which the System registered the largest number of events |
| Protected objects | Protected objects which are most frequently encountered in data intercepted by the System |
| Senders | Senders for which the System registered the largest number of events |
| Policies | Policies that were applied to intercepted data most frequently |
| Recipients | Recipients for which the System registered the largest number of events |
| User decisions | Statistics on the decisions which the security officer made for events intercepted by the System |
| Resource lists | Web resources to which the company employees sent requests most frequently |
| Event types | Distribution of the number of events into types (mail, Skype, external devices, etc.) |

**For the chosen type of statistics, you can specify how to display data. Select either of the following:**

-  - bar chart with grouping;
-  - bar chart with accumulation;
-  - pie chart;
-  - graph.

**Note:**

For the Dynamics of activity statistics type, only the “graph” diagram can be used. For other types of statistics, the “graph” type of diagram is unavailable.

**Widget parameters for the “Dynamics of activity” statistics type:**

| Parameter | Description |
|---|---|
| Violation levels | Events with a specified violation level will be added to the widget. Select checkboxes next to desired values. |
| Grouping period | Specify a period for which events will be grouped. Possible values:<br>• minute;<br>• hour;<br>• day;<br>• week;<br>• month;<br>• quarter;<br>• year. |

**Widget parameters for other types of statistics:**

| Parameter | Description |
|---|---|
| Chart type | The following types are available:<br>• bar chart with grouping<br>• bar chart with accumulation<br>• pie chart (except for the "Dialogs" diagram type) |
| Number of records | The number of records that will be displayed in the widget. Specify a value from 1 to 100.<br>**Note**: For the "User decisions" statistics type, this option is not displayed. |

| Parameter | Description |
|---|---|
| Merge other records into “Other” item | Select this option if you want to add the “Other” item that will combine the rest of records on the widget.<br>**Note**: For the "User decisions" statistics type, this option is not displayed. |
| Show values | Select this option for numerical values to be displayed on the widget. |
| Show proportions | This option is available for the pie chart only. |

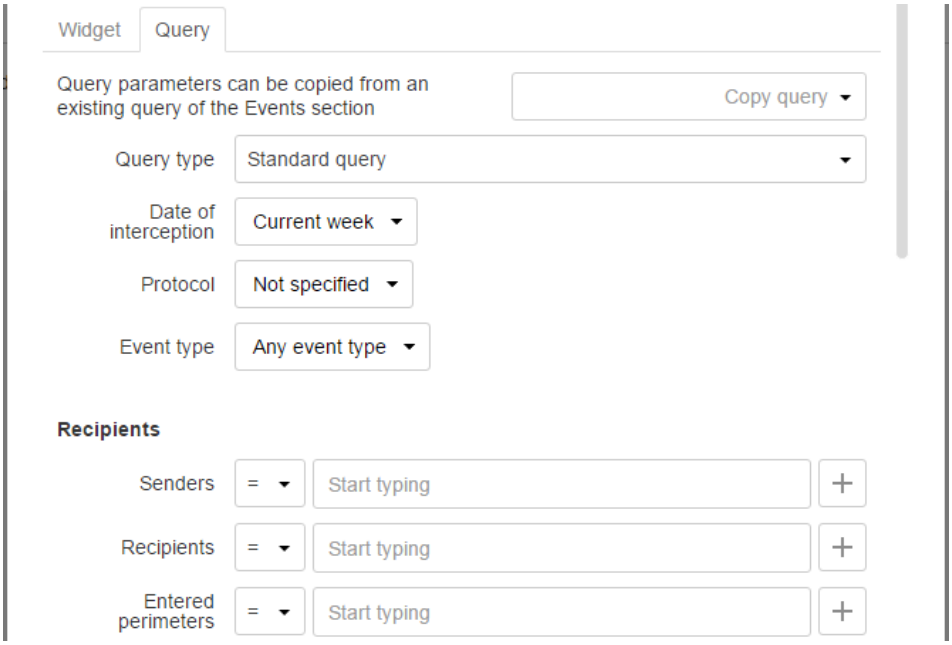
**User’s target actions:**

- Configuring widgets to display statistical information (see “Managing widgets of reports")

## 4.3.2 Queries

A query allows you to select interception objects to be displayed in the widget.

You can copy parameters of a query that has been added in the **Events** section, or create a new query.




The **Query** tab in the widget creation window

You can create queries in a standard or advanced mode. The standard mode allows you to select query conditions from the list (for details, see "Condition").

In the advanced mode, you can perform a more flexible configuration of the query conditions (for details, see "Advanced mode").

**User’s target actions:**

- creating a query (see "Query Creation in Standard Mode" and "Query Creation in Advanced Mode").

## 4.3.3 Report Execution History

Report execution history allows you to view executed reports, delete obsolete report versions, and save selected versions to a file.




Attributes of the report execution history:

| Parameter | Description |
|---|---|
| Execution date | Date and time of the report execution |
| Comment | Comment to the report added by the user |

**User's target actions:**

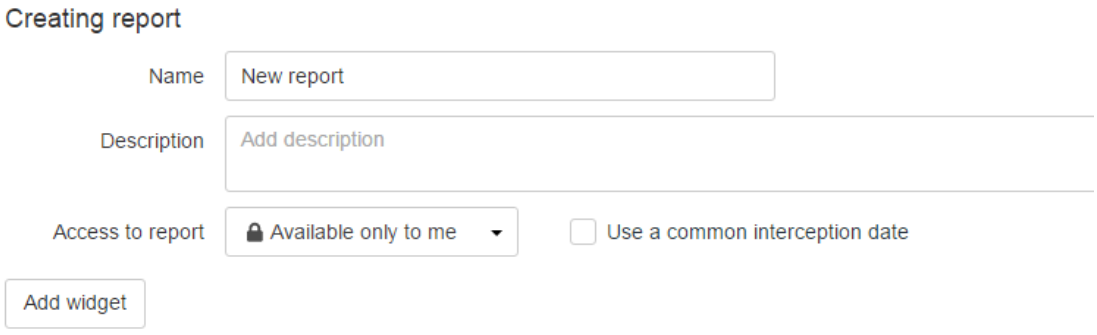
- viewing report execution history and, if necessary, deleting selected report versions or saving selected versions to file (see "Managing ready reports").

## 4.3.4 Report Creation Form

The report creation (edit) form is displayed when you create a new report or edit an existing one.

In the left part of the working area of the **Reports** section, you can see the list of folders that contain reports.

Reports allow you to generate statistics based on data stored in the System.




Report parameters:

| Parameter | Description |
|---|---|
| Name | Report name |
| Description | Description in any form |

| Parameter | Description |
|---|---|
| Access to report | Specify if the report is available only to the owner or to all users.<br>This option is available only to reports of the first level. When creating a report within a folder, the access level specified for the folder defines the access level for the report. |
| Use common interception date | Select this check-box if you want to use the specified interception date for all added queries. When selecting this option, a drop-down list is displayed where you can specify a desired period. |

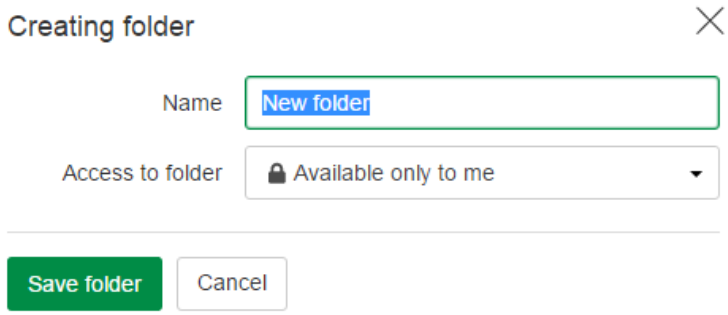
**User's target actions:**

- creating a report

### 4.3.5 Report Folder Creation Form

In the left part of the working area of the **Reports** section, the list of folders is displayed.

Folders allow you to group reports on some basis, inherit permissions and copy a selected group of reports.




Folder attributes:

| Parameter | Description |
|---|---|
| Name | The name of the folder |
| Access to folder | Specify if the folder will be available only to the owner or to all users.<br>This option is available only to folders of the first level. When creating subfolders, the access level is inherited from the parent folder. |

**User's target actions:**

- creating a folder with reports

## 4.4 Technologies Section

**Reference information:**
***Technologies*** are sets of data used for analysis of interception objects.

**About the section:**

The section contains editable catalogs of categories and terms, text objects, sample documents, blanks, stamps, database unloadings as well as the list of preinstalled graphical objects.




**Technologies** section, **Categories and terms** subsection

The section contains the following elements:

| Element | Purpose |
|---|---|
| Tabs with types of catalogs:<br>• Categories and terms<br>• List of text objects<br>• List of sample documents<br>• List of blanks<br>• List of stamps<br>• List of DB unloadings<br>• List of graphical objects | Contain the lists of elements and tools for a selected catalog |
| Toolbar | A set of tools for working with a selected catalog |
| Page navigation panel | The set of buttons for browsing pages with entries (if not all entries can be placed on one page) |
| Control of the entries number | The drop-down list where you can set the number of entries per page |

**User's target actions:**

- Creating a list of categories and terms (see "Creating categories and terms")
- Creating a list of text objects (see "Creating text objects and their values")
- Creating a list of sample documents (see "Managing sample documents")
- Creating a list of blanks (see "Creating blanks")
- Creating a list of stamps (see "Creating stamps")
- Creating a list of DB unloadings (see "Creating DB unloadings")

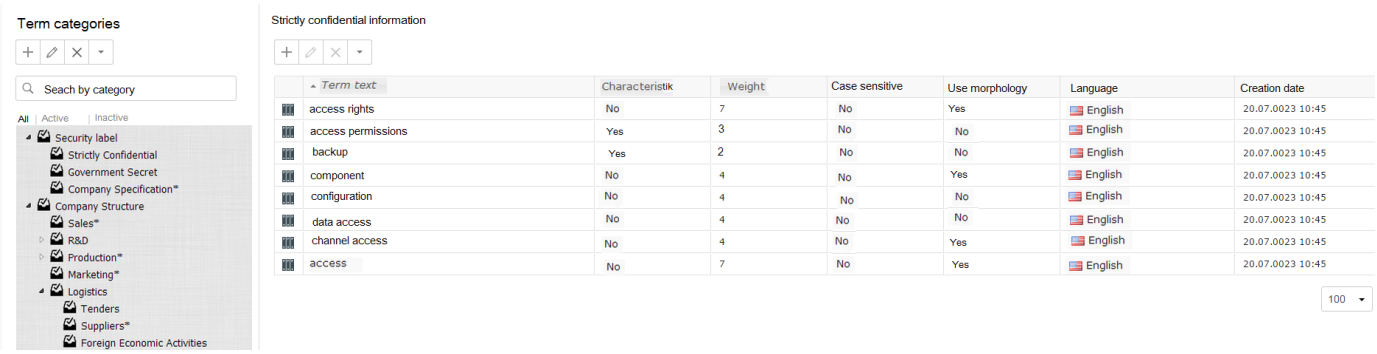
# 4.4.1 Categories and Terms

**Reference information:**

***Categories and terms*** are a set of data required for linguistic analysis.

Categories classify possible violations of a security policy. If the text contains an element that belongs to some category, the System correlates the text with this category.

For example, the *Finance* category contains financial terms (*payment*, *investors*, *prices,* etc.). In this case, the presence of terms “payment”, “investors” or “prices” in text allows the System to correlate this text with the *Finance category.*




The subsection contains the following elements:

| Parameter | Description |
|---|---|
| List of categories | A set of subject areas the intercepted objects can correspond to |
| List of terms | A set of terms for the selected category |
| Toolbar | A set of tools for categories and category elements |
| Search string | A string where you can enter some text to search for by categories |
| Page navigation panel | The set of buttons for browsing pages with entries (if not all entries can be placed on one page) |
| Control of the entries number | The drop-down list where you can set the number of entries per page |

**User’s target actions:**

- Creating a list of categories and terms (see "Creating Categories and Terms")
- Importing and exporting categories and terms as a part of the base of technologies (see “Exporting and Importing the Technologies Database")
- Adding categories to protected objects (“Creating a Protected Object")

## 4.4.1.1 Categories

**Reference information:**

The ***category*** is a set of elements corresponding to a specific topic (for example, *Security labels* or *Project terms* ). It contains either the list of categories (subcategories) or the list of elements relating to the category.




**Note:**

Preset categories marked with an asterisk (*) do not contain objects. Such categories are filled during the System implementation or later during customization.

Category attributes:

| Parameter | Description |
|---|---|
| Name | Category name |
| Weight | The value specified by default for all terms of the category as the **Weight** attribute |
| Language | The language of category terms |
| Use morphology | Indicates if morphological forms of a term are taken into account in traffic analysis |
| Case sensitive | Indicates if the case is matched in traffic analysis |
| Description | Description in any form |
| Creation date | The date and time of category creation |
| Modification date | Date and time of the last modification of the category This attribute is displayed in the edit mode only. |

For the category to be detected in intercepted data, it must be included in protected objects.

**User's target actions:**

- creating subject areas of confidential data (see "Creating Categories and Terms")
- including categories in protected objects (see "Creating a Protected Object")

## 4.4.1.2 Terms

**Reference information:**
The ***term*** is a word or phrase which (if found in the analyzed text) increases the degree of conformity of the text to the category of the found term.


Strictly confidential information

| Term text | Characteristik | Weight | Case sensitive | Use morphology | Language | Creation date |
|---|---|---|---|---|---|---|
| access rights | No | 7 | No | Yes | English | 20.07.0023 10:45 |
| access permissions | Yes | 3 | No | No | English | 20.07.0023 10:45 |
| backup | Yes | 2 | No | No | English | 20.07.0023 10:45 |
| component | No | 4 | No | Yes | English | 20.07.0023 10:45 |
| configuration | No | 4 | No | No | English | 20.07.0023 10:45 |
| data access | No | 4 | No | No | English | 20.07.0023 10:45 |
| channel access | No | 4 | No | Yes | English | 20.07.0023 10:45 |
| access | No | 7 | No | Yes | English | 20.07.0023 10:45 |

Term attributes:

| Parameter | Description |
|---|---|
| Term text | A word or phrase which (if found in the analyzed text) increases the degree of conformity of the text to the term category |
| Characteristic | If this attribute is enabled, then finding the term in traffic certainly assigns the term category to the object |
| Weight | Indicator of the term significance |
| Case sensitive | Indicates if the case is matched in traffic analysis |
| Use morphology | Indicates if morphology is used in traffic analysis |
| Language | The language of the term |
| Creation date | The date and time of term creation |
| Modification date | Date and time of the last modification of the term. This attribute is displayed in the term edit mode only. |

**Note:**

The **Case sensitive** and **Use morphology** parameters are set by default when specifying these parameters for the category. Parameters of the term can be then edited and saved. In this case, when editing case and morphology settings of the category, these changes will not apply to the terms.

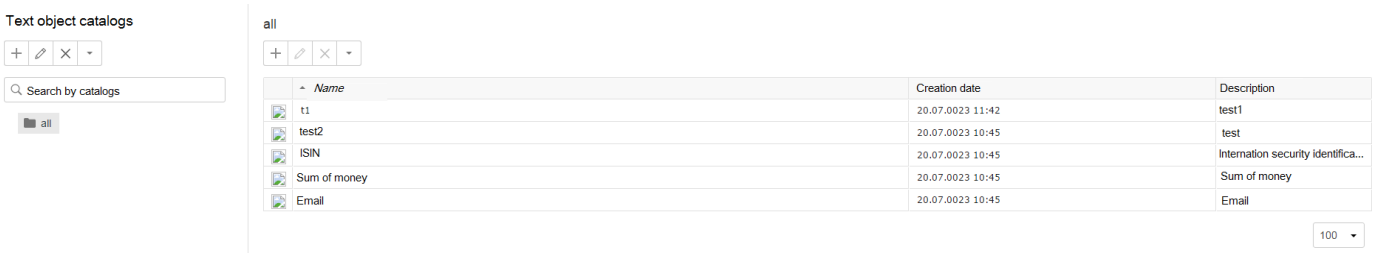
**User's target actions:**

- Creating and editing terms (see "Creating Categories and Terms")

## 4.4.2 Text Objects

**Reference information:**
The ***text object*** is a text information extracted from the object body and attachments. Contains no formatting or markup. Is used for analysis and search.

Both system and user-created text objects can be used in the System.
Text objects are created within catalogs. For operations with catalogs (creating, editing or deleting a catalog; search by catalogs), tools on the left side of the working area are used. Text objects of a selected catalog and tools for operations with text objects are located on the right side of the working area.




For adding an object to the catalog, the + toolbar button on the right side of the working area is used.

Editing properties of an added text object is done with the button. When clicking on this button, the edit window opens where you can view and change (if necessary) attributes of a selected object. To delete the selected text objects, use the × button.

> **Warning!**
>
> When deleting a system text objects from a catalog, user templates created for this object will also be deleted.

Text object parameters:

| Parameter | Description |
|---|---|
| Name | Category name |
| Creation date | Date and time of the text object creation |
| Modification date | Date and time of the last modification of the text object. This attribute is displayed in the term edit mode only. |
| Text objects patterns | Value of the text object defined in a form of the exact sequence of symbols or using a regular expression. This attribute is displayed in the term edit mode only. |
| Description | Description in any form |

For the text object to be detected in intercepted data, it must be included in protected objects.

**User's target actions:**

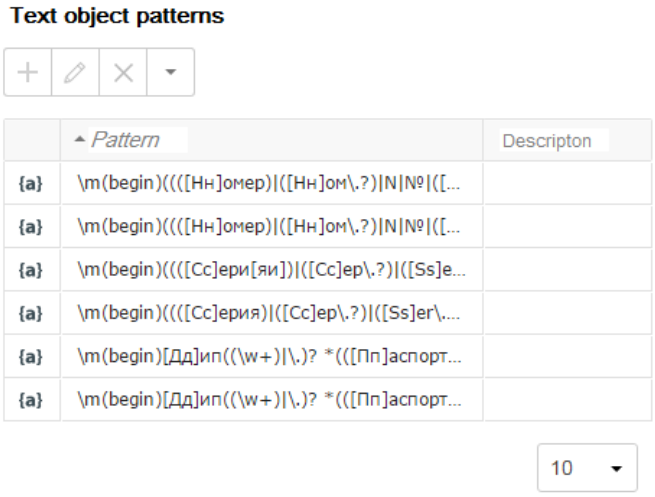
- Creating text objects and their catalogs (see "Managing Text Objects");

- Adding system text object to a selected catalog (see "Managing Text Objects");
- Importing and exporting text objects as a part of technologies base (see “Exporting and Importing the Technologies Database")
- Adding text objects to protected objects (see "Creating a Protected Object")

### 4.4.2.1 Text objects patterns

**Reference information:**
The *text object pattern* is a value of the text object set in a form of the exact sequence of symbols or with a regular expression.Patterns allow you to specify one or several values for each text object.

Patterns for a selected text object are displayed when switching to the edit mode of the text object.

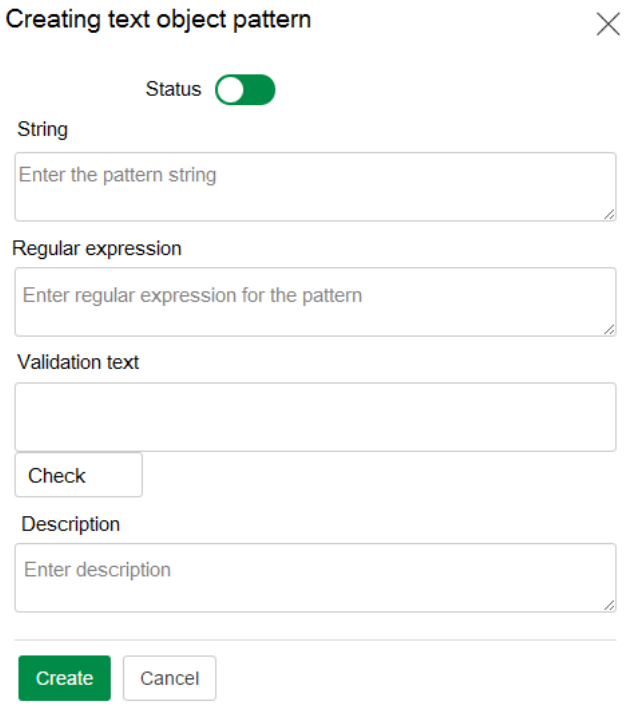



Using buttons of the toolbar you can add a new pattern ( button), switch to the edit mode of a selected pattern ( button), delete selected templates ( button), and change pattern status (for this, click and in the drop-down list select **Activate**/**Deactivate**). The current status of a pattern is displayed in the left column of the table: active patterns are marked with , inactive ones are marked with .

**Warning!**

Editing and deleting preinstalled patterns of the system text objects is unavailable.

When adding a pattern, a pattern creation window opens where you can specify the pattern attributes.




Pattern attributes:

| Parameter | Description |
|---|---|
| Status | Indicates if this text object value is used.Possible values:*Active* and *Inactive* |
| Pattern type | Specify how you want to set the template: as a string or a regular expression. |
| String | Appears if you select the type of template - *String*.<br>Exact value of the text object specified as a sequence of characters.<br>*For example*, the pattern `example@company.com` will find only the exact matching - `example@company.com` |
| Regular expression | Appears if you select the type of template - *Regular expression*.<br>Configurable template.For more information on creating custom templates, see the Internet article "Regular Expression Language". |
| Validation text | Appears if you select the type of template - *Regular expression*.<br>Example of a text for finding the regular expression. Enter the verification text and click **Check**. |
| Description | Description in any form |

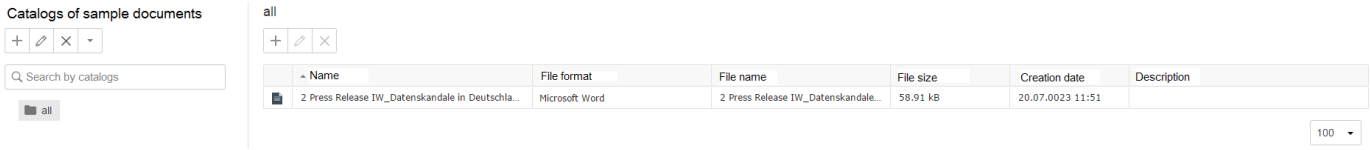
User's target actions:

- Creating a text object

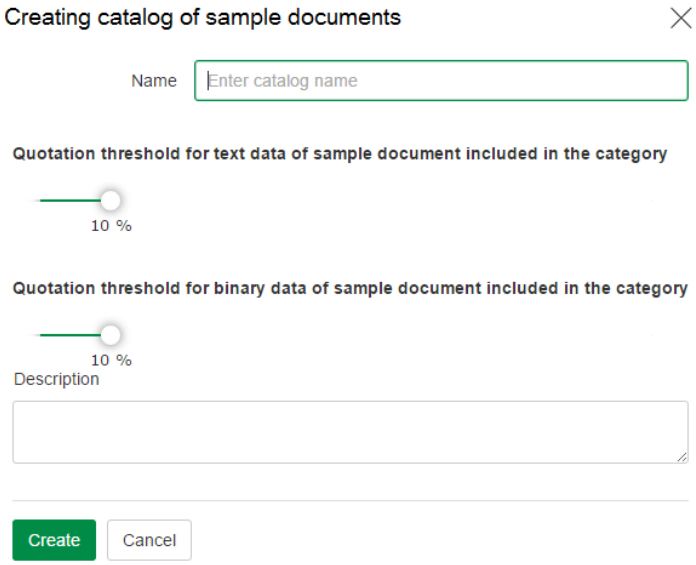
## 4.4.3 Sample Documents

**Reference information:**
**The *sample document*** is a document containing quotes for text analysis. Memos, financial reports, contracts, and other sensitive documents can all be used as sample documents. Sample documents are

stored in the system as digital prints, their text is not available to either users or System administrators.Sample documents are grouped into catalogs.



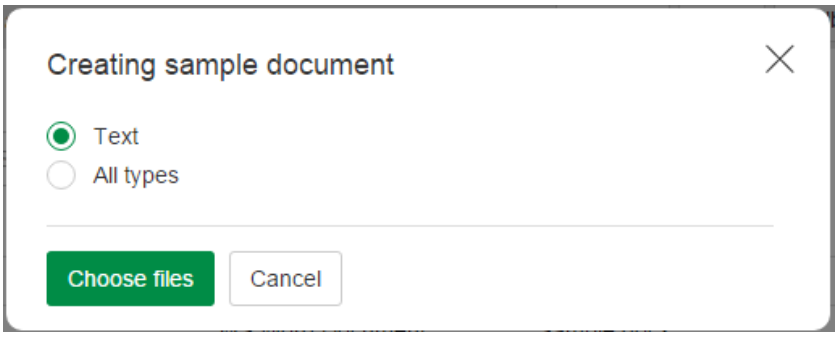

Clicking on the  button on the toolbar on the left side of the working area opens a catalog creation window where you can specify its attributes.



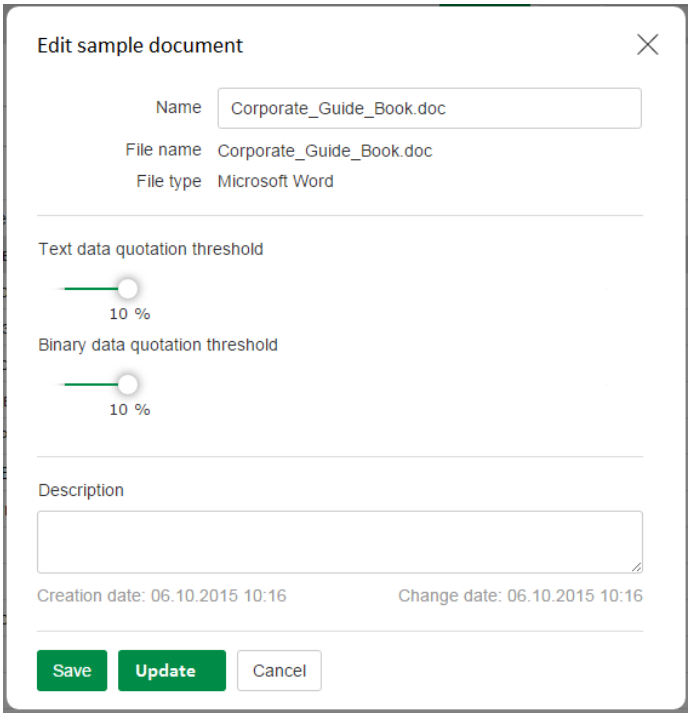

Attributes of the catalog of sample documents:

| Parameter | Description |
|---|---|
| Name | Name of the catalog of sample documents: |
| Text data quotation threshold | The percentage of the sample document that is sufficient for referring the intercepted object to this sample document. For text objects detecting (document text). |
| Binary data quotation threshold | The percentage of the sample document that is sufficient for referring the intercepted object to this sample document. For detecting binary objects (images, executable files, etc.). |
| Description | Description in any form |

Adding a file of the sample document to a created catalog is performed with the  toolbar button on the right side of the working area. In the dialog window that opens, specify the data type (**Text** or **All types)** and choose files to be downloaded.




Editing properties of an added sample document is performed with the button on the toolbar. In the window that opens, you can view and change (if necessary) the attributes of the selected sample document.



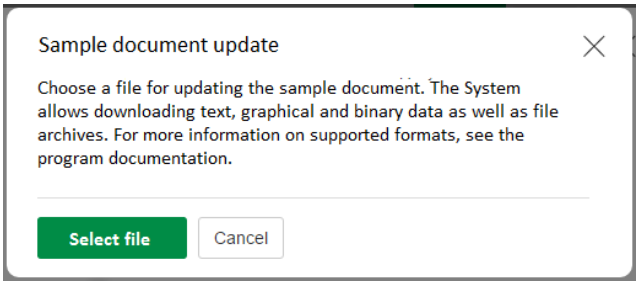

Sample document edit window

Attributes of the sample document:

| Parameter | Description |
|---|---|
| Name | Sample document name |
| File name | The name of the file loaded as a sample document |
| File format | Type of the file: text, image, etc. |
| File size | The size of the file loaded as a sample document |
| Creation date | The date and time when the sample document was created |
| Modification date | The date and time of the last modification of the sample document. This attribute is displayed in the edit mode only. |

| Parameter | Description |
|---|---|
| Text data quotation threshold | The percentage of the sample document that is sufficient for referring the intercepted object to this sample document. For text objects detecting (document text).This attribute is displayed in the edit mode only. |
| Binary data quotation threshold | The percentage of the sample document that is sufficient for referring the intercepted object to this sample document. For detecting binary objects (images, executable files, etc.).This attribute is displayed in the edit mode only. |
| Description | Description in any form |

Switching to the update mode of the sample document is performed with the **Update** button in the document edit window.




For the sample document to be detected in intercepted data, it must be included in protected objects.

**User's target actions:**

- Creating Sample Documents and their Catalogs (see "Managing sample documents")
- Importing and exporting sample documents as a part of the technologies base (see "Exporting and Importing the Technologies Database")
- Updating the sample document (see "Creating Sample Documents")
- Adding sample documents to protected objects (see "Creating a Protected Object")

## 4.4.4 Blanks

**Reference information:**
***Blank*** is a formsheet whose version (filled or not) is searched for in the network traffic. Blanks are stored in the System as digital fingerprints, their text is not available for viewing either by users or by the System administrators.
The blanks may be surveys, questionnaires and other documents completed in a predefined form. Technically the blank is a file each line of which contains one field of the blank. Rows are separated by line break. The blank contains at least 2 fields.

For the blank to be detected in intercepted data, it must be included in protected objects.

**Warning!**

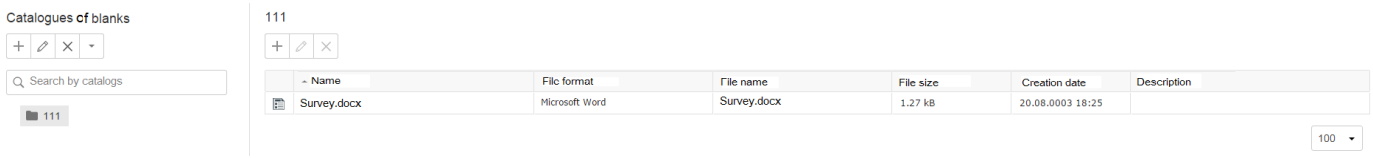
To match an interception object with the protected object which contains a blank, the following requirements must be met:

- the object text contains, at least, one field from the blank;

- if the number of fields detected in the object text is more than one, then fields should be in the same order as in the digital print uploaded to the System;
- if the **Detect only filled blanks** option is selected, then, at least, one character should be placed between the adjacent rows.

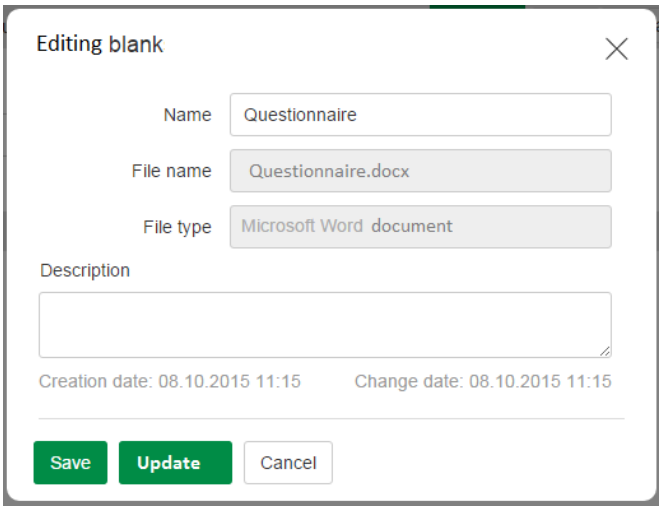
The principle of technology is: a search for names of the blank fields is performed, then their order is checked, then, if necessary, the presence of text between fields of the blank is checked. Based on these checks, the System defines whether the blank is filled out.

Blanks are created within catalogues. For operations with catalogs (creating, editing or deleting a catalog; search by catalogs), tools on the left side of the working area are used. Blanks of a selected catalog and tools for operations with blanks are located on the right side of the working area.




The list of blanks and their catalogues

Adding a file of the blank to a created catalogue is performed with the + toolbar button on the right side of the working area is used. Editing properties of the added blank is performed with the button. Clicking the button opens a window where you can view and change (if necessary) attributes of the selected blank.



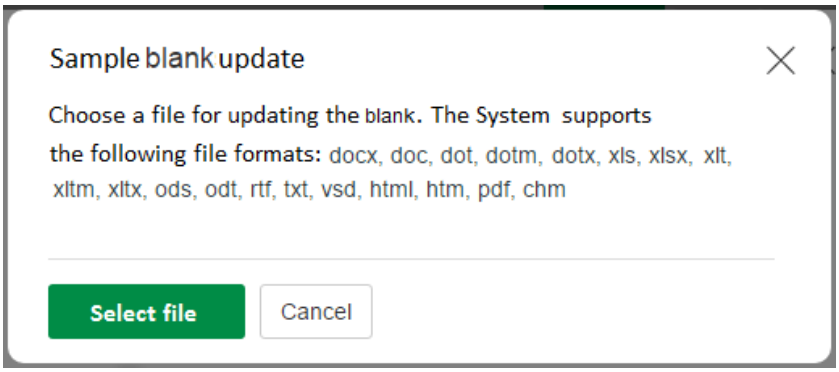

Blank edit window

Blank attributes:

| Parameter | Description |
|---|---|
| Name | The name of the blank |
| File type | File format. The following formats are supported: DOCX, DOC, DOT, DOTM, DOTX, XLS, XLSX, XLT, XLTX, XLTM, ODS, ODT, RTF, TXT, HTM, HTML, VSD, PDF, CHM |

| Parameter | Description |
|---|---|
| File name | The format of the file that was loaded as a blank |
| Description | Description in any form |
| Creation date | The date and time of blank creation |
| Modification date | Date and time of the last modification of the blank. This attribute is displayed only when editing the blank. |

Switching to the update mode of the blank is performed with the **Update** button in the blank edit window.



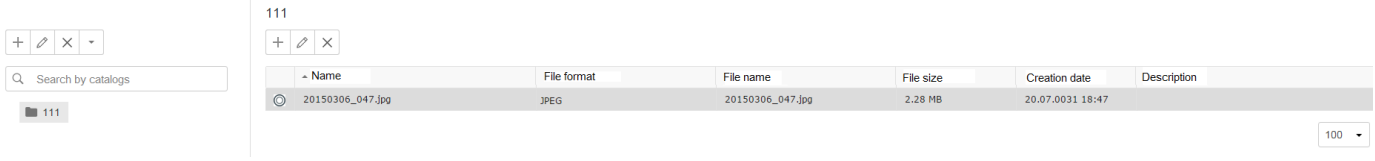

**User's target actions:**

- Creating blanks and their catalogues (see "Managing Blanks")
- Importing and exporting blanks as a part of the technologies base (see "Exporting and Importing the Technologies Database")
- Updating a blank (see "Managing Blanks")
- Adding blanks to protected objects (see "Creating a Protected Object")

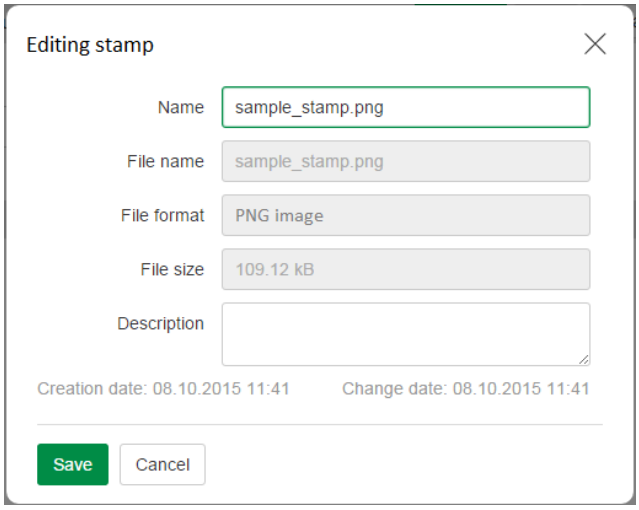
## 4.4.5 Stamps

**Reference information:**
The ***stamp*** is a stamp image that is searched in the network traffic. Stamps can be images of round or triangular impressions used in organizations.

Stamps are created within catalogs. For operations with stamp catalogs (creating, editing or deleting a catalog; search by catalogs), tools on the left side of the working area are used. Stamps of a selected catalog and tools for operations with stamps are located on the right side of the working area.




Adding a file of the stamp to a created catalog is performed with the + toolbar button on the right side of the working area. Properties of an added stamp are edited with button. Clicking this button opens a window where you can view and if necessary change attributes of the selected stamp.




Stamp edit window

Stamp attributes:

| Parameter | Description |
|---|---|
| Name | The name of the stamp |
| File format | The image format. The following formats are supported: BMP, DIB, JPEG, JPG, JPE, JP2, PNG, PBM, PGM, PPM, SR, RAS, TIF, TIFF. |
| File name | The name of the file that was loaded as a stamp |
| File size | The size of the file that was loaded as a stamp |
| Description | Description in any form |
| Creation date | The date and time when the stamp was created |
| Modification date | Date and time of the last modification of the stamp. This attribute is displayed in the edit mode only. |

To successfully load a stamp (round or triangular) to the System, the following conditions should be met:

- stamp image should be against a white background with a minimum amount of white color along the stamp edges;
- resolution of the stamp should be 150 dpi or higher;
- the minimum image size is 500x500 pixels;
- all elements of the stamp should be clearly visible;
- a stamp should have a solid frame around its perimeter;
- a ***triangular*** stamp should face downwards, its base should be horizontal.

For the stamp to be detected in intercepted data, it must be included in protected objects.

**User's target actions:**

- Creating stamps and their catalogs (see "Managing Stamps")
- Adding stamps to protected objects (see "Creating a Protected Object")

- Importing and exporting stamps as a part of the technologies base (see "Exporting and Importing the Technologies Database")

## 4.4.6 Database Unloadings

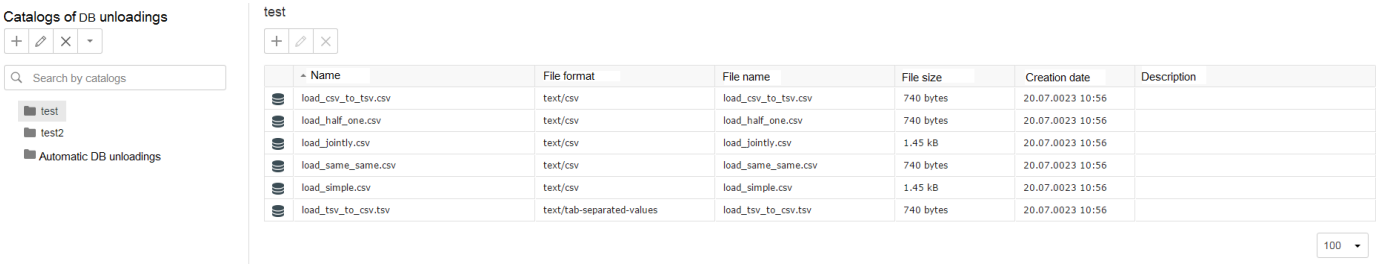
**Reference information:**
***Database unloading*** is a part of database citations from which are searched for in analyzed text. Database unloadings can be lists of salaries, personal data, etc.

**Warning!**

For correct operation in the System, the database unloading should have the following characteristics:

- the number of columns is no more than 32;
- the number of words in one cells is no more than 256;
- the number of rows is no more than 1 million (for 8 GB RAM server) or no more than 3.5 millions (for 16 GB RAM server);
- unloading size maximum of 1 Gb in case Postgre SQL is used.

Unloadings are created within catalogs. For operations with unloading catalogs (creating, editing or deleting a catalog; search by catalogs), tools on the left side of the working area are used. DB unloadings of a selected catalog and tools for operations with stamps are located on the right side of the working area.




The preinstalled catalog **Automatic DB unloadings** contains unloadings received from external systems (for further details, see "Automatically Updated Database Unloadings").

**Note:**

The **Automatic DB unloadings** catalog is a system catalog and it cannot be deleted.

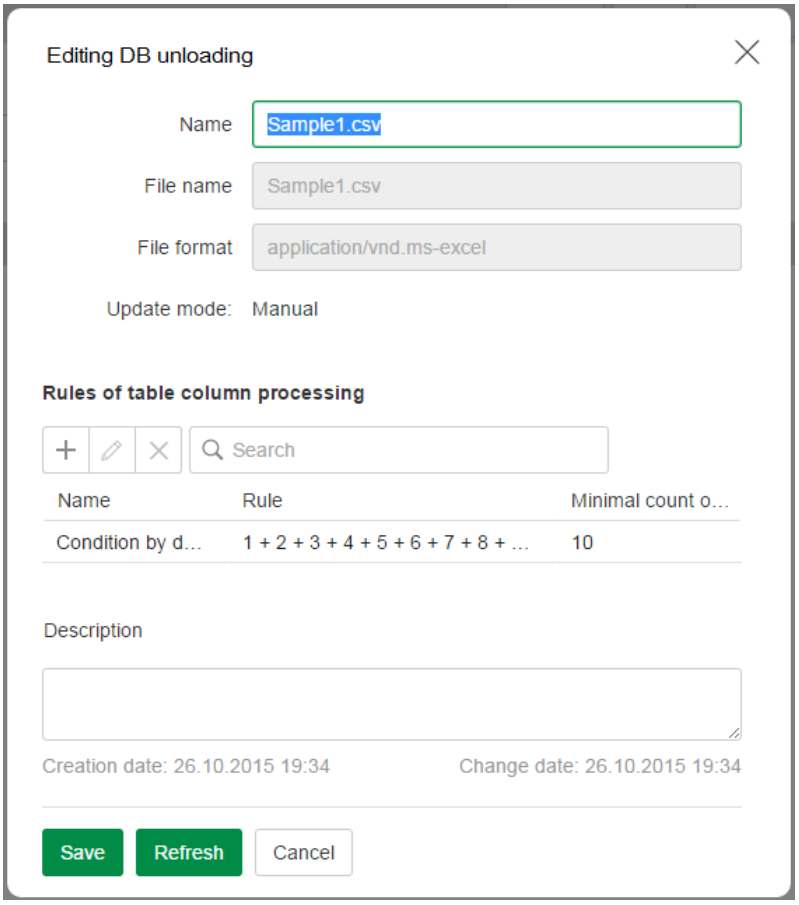
Adding a file of the unloading to a created catalog is performed with the + toolbar button on the right side of the working area is used.

A loaded file of a unloading is then compiled. The amount of RAM consumed during compilation can be approximately calculated by the following formula:

`Memory(GB) = 0.05 * unique_words(M) * cells(M)`, where M stands for million.

For example, 10 million cells can fit in a table with 2 columns and 5 million rows, or in a table with 4 columns and 2.5 million rows.

Editing properties of the added unloading is performed with the button on the toolbar on the right side of the workspace. In the window that opens, you can view and change (if necessary) the attributes of the selected unloading.

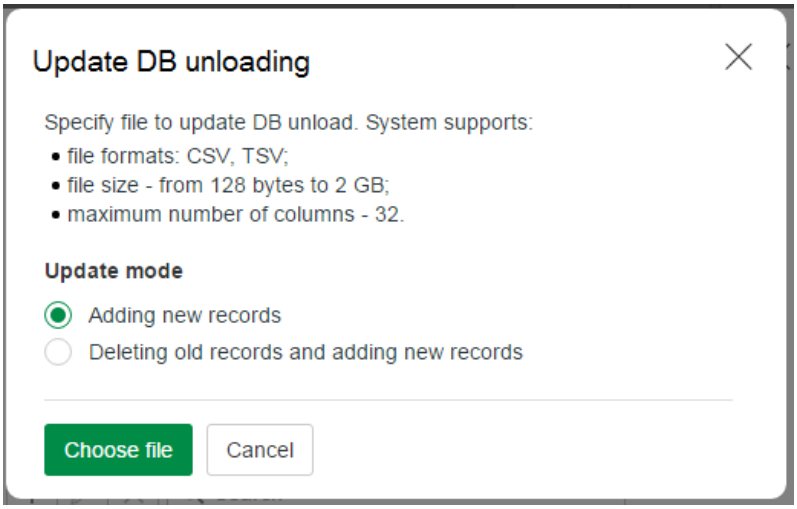



Attributes of database unloading:

| Parameter | Description |
|---|---|
| Name | The name of the unloading |
| File name | The name of the file that was loaded as a database unloading |
| File format | Type of file |
| Update mode | Possible choices: **Manual** or **Automatic** |
| Description | Description in any form |
| Creation date | The date and time when the unloading was created |
| Modification date | Date and time of the last modification of the unloading. This attribute is displayed in the edit mode only. |

| Parameter | Description |
|---|---|
| Rules of processing table columns | Describes the logical correlation between table columns and the minimal number of non-blank rows in a table required for triggering the unloading. |

Switching to the update mode of the unloading is performed with the **Update** button in the unloading edit window.




For the unloading to be detected in intercepted data, it must be included in protected objects.

**User's target actions:**

- Creating database unloadings and their catalogs (see "Managing DB Unloadings")
- Updating the unloading (see "Managing DB Unloadings")
- Adding detection conditions for the unloading (see "Detection Conditions for Unloading")
- Automatic update of the unloading (see "Automatic creation and update of DB unloading ")
- Add DB unloadings to protected objects (see "Creating a Protected Object")

### 4.4.6.1 Automatically Updated Database Unloadings

Automatically updated DB unloadings are unloadings created by an external system. An external system (a connector) initiates adding and subsequent updating automatic unloadings.

**Warning!**

Simultaneous editing configuration via the Management Console and SDK can cause conflict, so a connector developer should be familiar with the general principles of configuring the System. if a conflict arises, you should first view error messages sent by SDK to the connector.

Unloadings generated by an external system are placed in a preinstalled catalog **Automatic DB unloadings**. External systems are authorized in Traffic Monitor by means of plugin (on plug-in installation, see the document "*InfoWatch Traffic Monitor. Administration Guide*").

**Note:**

You can view and edit the **Automatic DB unloadings** catalog provided that you have a license for using this technology.

Attributes of automatic unloading are generated based on the data received from an external system:

| Parameter | Description |
|---|---|
| Name | The name of the unloading in the System |
| Update source | A system which is a source of file with unloading |
| Comment to the unloading | Accompanying information |
| Triggering condition | Detection of all filled columns. The minimum number of columns is`10`<br>For example:<br>If the number of columns is`3`, the condition will be as follows:<br>`1+2+3`, and the minimum number of columns is `10`. |

You can also add unloadings to the **Automatic DB unloadings** catalog manually using the



toolbar button on the right side of the working area is used. For manually added unloading, the update will be performed in a standard way (see "Managing DB Unloadings").

**Note:**

When you create an unloading, its file can be empty if:

- loading the contents ended with a force quit;
- connection was lost while loading the contents;
- validation of the contents failed.

When the System operation is restored, then, if the System contains an empty unloading, an external application can use this unloading and fill it with new contents without creating a new unloading.

All unloadings in the catalog can be edited or deleted. These operations are performed using buttons on the toolbar in the right part of the workspace.

**Warning!**

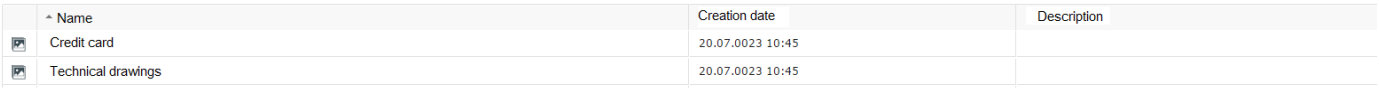
If an unloading created by an external system is deleted, automatic update of this unloading will become unavailable.

For automatic unloading to be detected in intercepted data, it must be included in protected objects.

# 4.4.7 Graphical Objects

**Reference information:**

The ***graphical object*** is an image extracted from the object body or its enclosures. The presence of certain features in the image makes it possible to attribute it to a particular class of preset graphical objects. Graphical objects are used when creating protected objects.




Graphical object attributes:

| Parameter | Description |
|---|---|
| Name | Name of the graphic object |
| Creation date | Date and time of object creation |
| Description | Description of a graphical object |

The System may contain the following graphical objects (the set of graphical objects depends on the license type):

| Name | Description |
|---|---|
| Credit card | Front side image of a VISA, Visa Electron, MasterCard, or Maestro credit card.<br>Is included in the **Personal data** preset protected object (or in the **Credit card information** preset protected object for the Malaysian version). |
| Topographic maps | A topographic map or its part |
| Technical drawings | Technical drawings in a form of black lines against a white background |
| Identification card of a citizen of Malaysia | Is available for the Malaysian version only.<br>A group of identification documents of the citizens of Malaysia including:<br>• `MyKad` – a general card for citizens of Malaysia over 12 years old (front side)<br>• `MyKid` – a card for children under 12 (front side)<br>• `MyPR` – a card for residents of Malaysia who received a residence permit (front side)<br>• `MyTentera` – a card for those who serve in the army (front side)<br>Is included in the **Personal ID** preinstalled protected object. |

Only preinstalled graphical objects with preset attributes are used in the System. Adding, editing or deleting graphical objects is not available.

For graphic objects to be detected in intercepted data, they must be included in protected objects.

**User's target actions:**

- creating a protected object based on graphical objects (see "Creating a Protected Object").

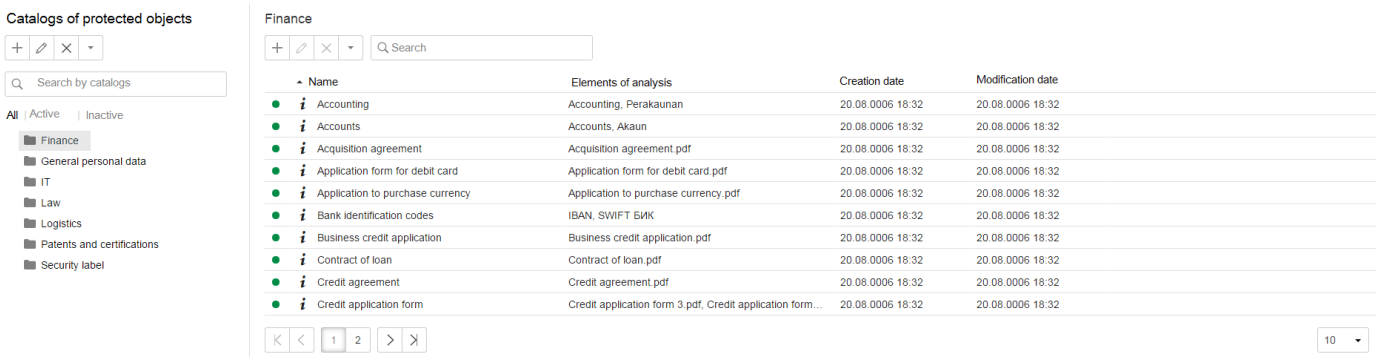
# 4.5 Protected Objects Section

**Reference information:**

The ***protected object*** is a set of elements of technologies. Protected objects are used to determine whether the intercepted data correspond to specific business documents.

**About the section:**

The section contains a list of events (interception objects) and tools for managing them




**The section contains the following elements:**

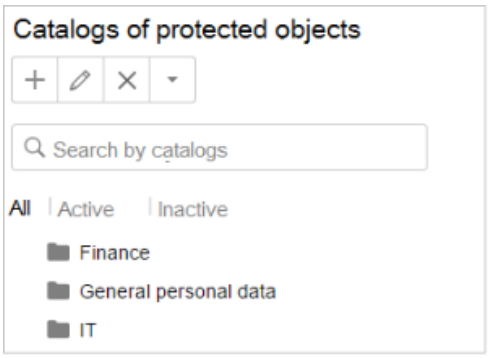
| Element | Purpose |
|---|---|
| Catalogs of protected objects | The list of added catalogs that contain protected objects. Is located in the left part of the workspace. |
| Protected objects | A list of protected objects contained in the selected catalog. Appears when you select a catalog |
| Toolbar | A set of tools for protected objects and their catalogs |
| Search field | Filtering of protected objects |
| Page navigation panel | A set of buttons for browsing pages with entries (if not all entries can be placed on one page). You can go to the next or previous page, move to the beginning or end of the list or go to the page with the selected number. |
| Control of the entries number | The drop-down list where you can set the number of entries per page |

The list of catalogs contains preinstalled catalogs of protected objects. For preinstalled protected objects, the elements of technologies and the detection conditions are specified.

The System contains preinstalled protected objects, the list of which may vary depending on the delivery.

## 4.5.1 Catalogues of Protected Objects

The left part of the **Protected objects** section workspace contains the list of catalogs, a toolbar for managing catalogs and a search field.




Attributes of catalog with protected objects:

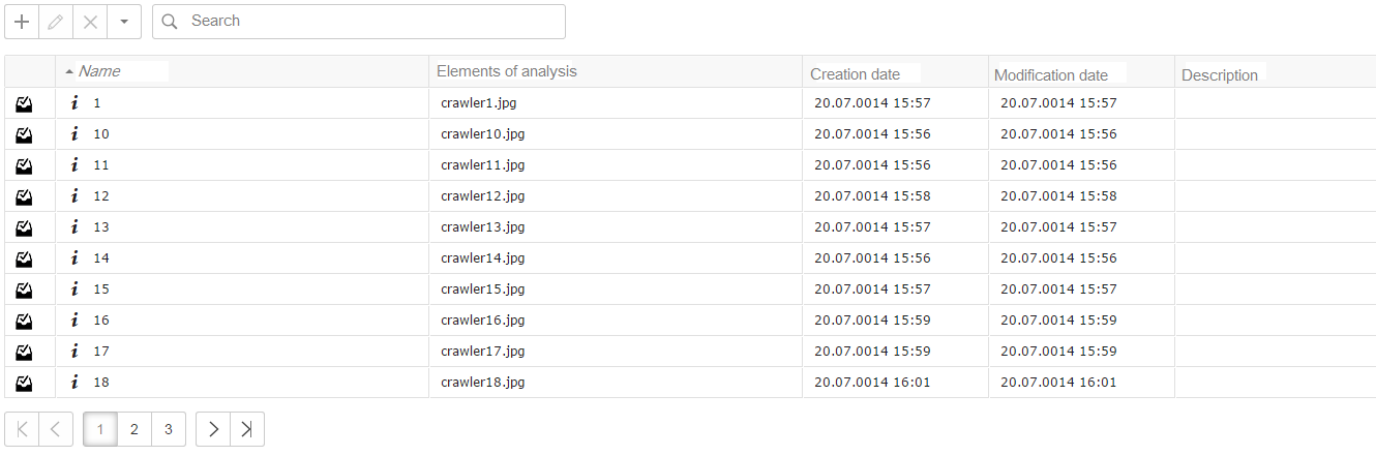
| Parameter | Description |
|---|---|
| Name | Name of the catalog |
| Status | Whether the catalog is active. The specified status will apply to all nested child directories and their protected objects. |
| Description | Description in any form |
| Creation date | The date and time of catalog creation |
| Modification date | Date and time of the last modification of the catalog. |

**User's target actions:**

- Creating a catalog of protected objects
- Creating policies for catalogs of protected objects
- Import and export of protected objects

## 4.5.2 Protected objects

The right part of the workspace displays protected objects for the selected catalog, toolbar for managing protected objects and a search field.




Parameters of the protected object

| Parameter | Description |
|---|---|
| Name | Name of the protected object |
| Status | Whether the protected object is active |
| Elements of technologies | Elements of technologies included in the protected object |
| Description | Description in any form |
| Creation date | Date and time when the protected object was created |
| Modification date | Date and time of the last modification of the protected object |

When creating a new protected object (the + button on the toolbar), the window of adding elements of technologies is displayed.

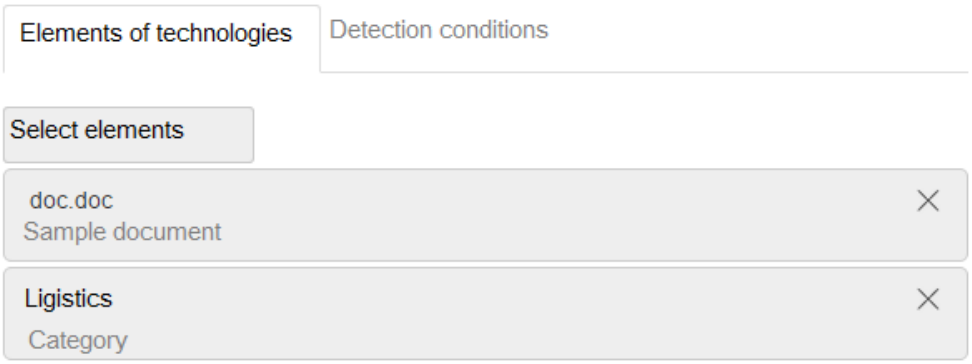
Clicking on the button on the toolbar opens the edit window for a selected protected object that contains the Elements of technologies and Detection Conditions tabs.

**User's target actions:**

- Creating a Protected Object
- Adding elements of technologies to a protected object
- Creating policy for a protected object

### 4.5.2.1 Elements of Technologies

**Reference information:**
***Elements of technologies*** are elements that are used when creating protected objects. They can be text objects, sample documents, etc.




**Protected objects** section, **Elements of technologies** tab

The **Elements of technologies** tab appears when creating a protected object, once the desired elements are selected in the adding elements of technologies window or switching to edit mode of a previously created protected object.

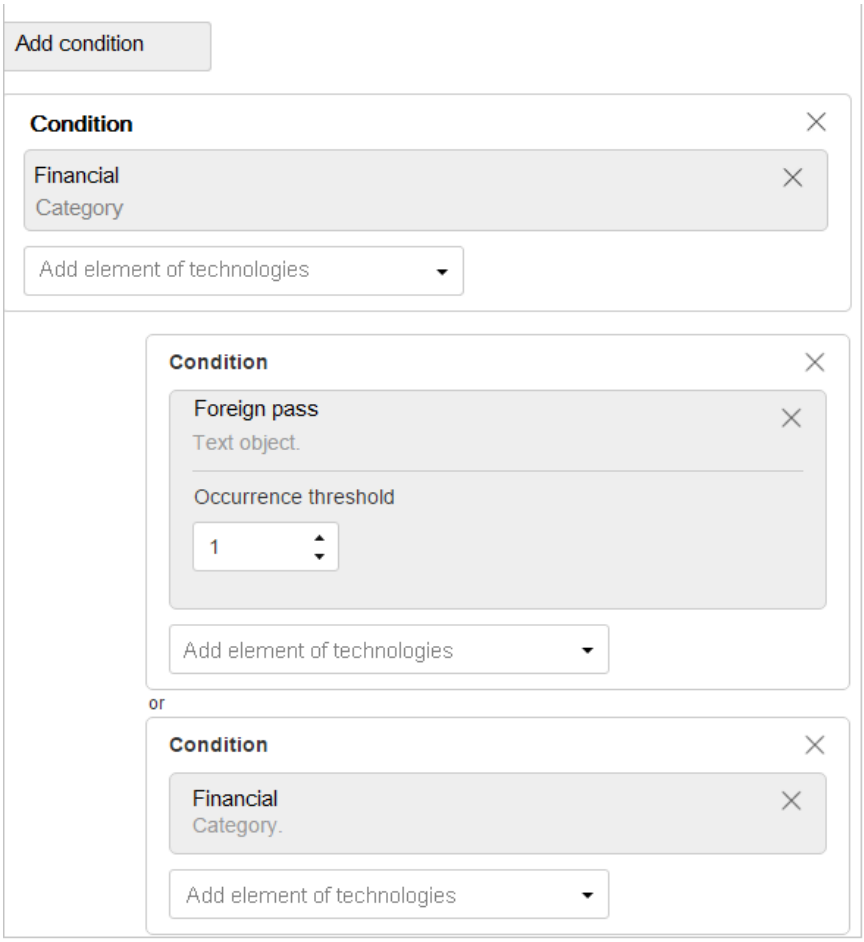
On the **Elements of technologies** tab, you can add more elements of technologies to a protected object (the **Select elements** button) or delete elements of technologies (the X button in the upper right corner of the element panel).

You can specify detection conditions for added elements of technologies on the **Detection conditions** tab.

**User's target actions:**

- Adding elements of technologies

## 4.5.2.2 Detection Conditions




The **Detection Conditions** tab which is displayed when creating or editing a protected object

You can specify detection conditions when creating a protected object after the desired elements are selected in the window of adding elements of technologies or when switching to the edit mode of a previously created protected object.

Detection conditions can be added within a single block and combined using the operation of conjunction (logical AND) or added to different blocks which are combined with the operation of disjunction (logical OR).

Detection conditions for the elements of technologies:

| Element name | Detection condition |
|---|---|

| Element name | Detection condition |
|---|---|
| Sample document | Checks whether the interception object contains a specified sample document |
| Category | Checks whether the interception object matches the specified categories. For categories that contain sub-categories, checks if the interception object matches any subcategory. |
| Text object | Checks whether the interception object contains a specified text object. Additional detection conditions is a quantity threshold. It determines the least number of times the text object must be present in the interception object. The default value is 3.<br>Depending on the pattern type, the number of occurrences of the text object is calculated as follows:<br>• if the text object pattern is specified as a regular expression, then one pattern value is counted as one occurrence even if it is detected several times within a document<br>• if the text object pattern is specified as a string, all its occurrences are counted. |
| Blank | Checks whether the interception object contains at least one of the specified blanks. Additional detection conditions:<br>• search through filled and unfilled blanks. If you want all blanks to be detected, select the **Filled and unfilled** checkbox. By default only filled blanks are detected;<br>• a minimum number of matching entries. The default value is 3. |
| Stamp | Checks whether the interception object contains a specified stamp |
| Graphical object | Checks whether the interception object contains a specified graphical object |
| Database unloading | Checks whether the interception object contains a specified unloading.You must select one of the representations of unloading |

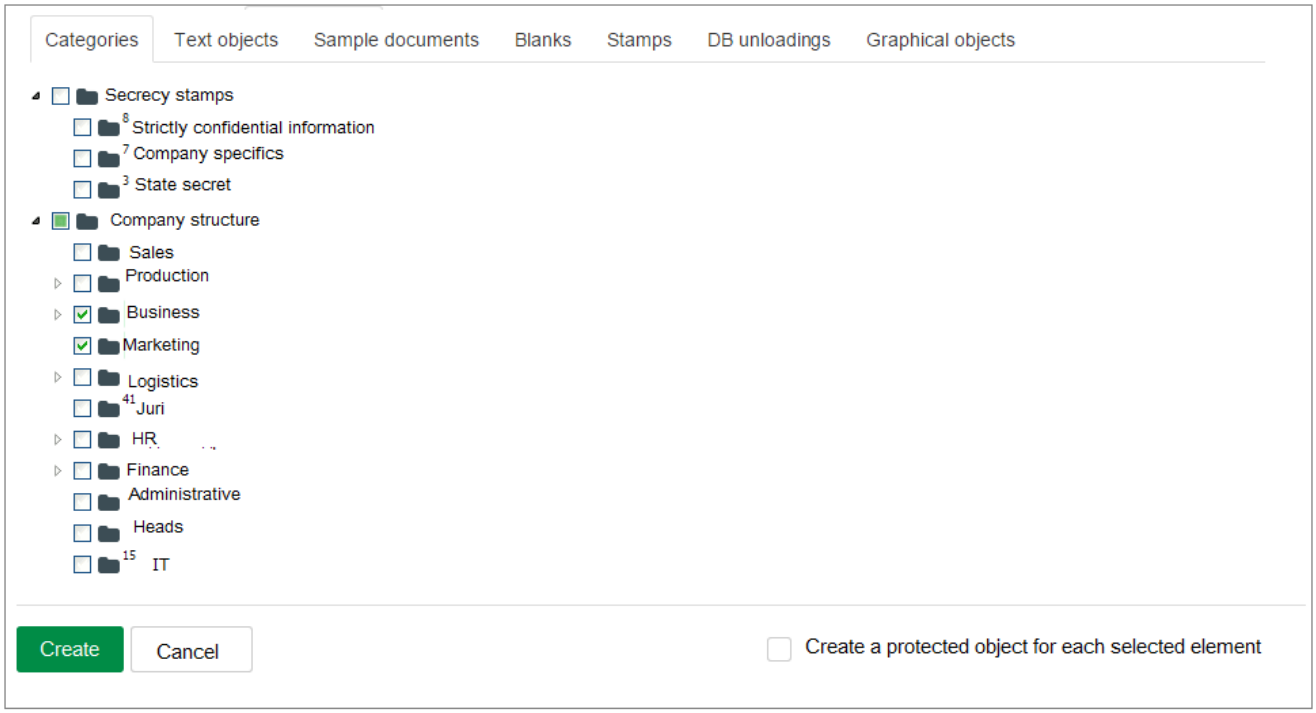
See also: Elements of technologies

**User's target actions:**

- Adding detection conditions

## 4.5.2.3 Window of Adding Elements of Technologies

The window of adding elements of technologies is displayed when creating a new protected object or when clicking the **Select elements** button on the **Elements of technologies** tab.




The elements in the window are grouped on tabs. When clicking on a tab, the list of available elements is displayed.

The window for adding elements of technologies contains the following tabs:

- *Sample documents* - the list of available sample documents
- *Categories* - the list of available categories
- *Text objects* - the list of available text objects
- *Blanks* - the list of available blanks
- *Stamps* - the list of available stamps
- *DB unloadings* - the list of available database unloadings
- *Graphical objects* - the list of available graphical objects

For more information about elements of technologies, see "Defining confidential information".

**Note:**

If **Create a protected object for each selected item** option is selected, then for each element of technologies, a separate protected object will be created. Attributes of protected objects are set by the System automatically.

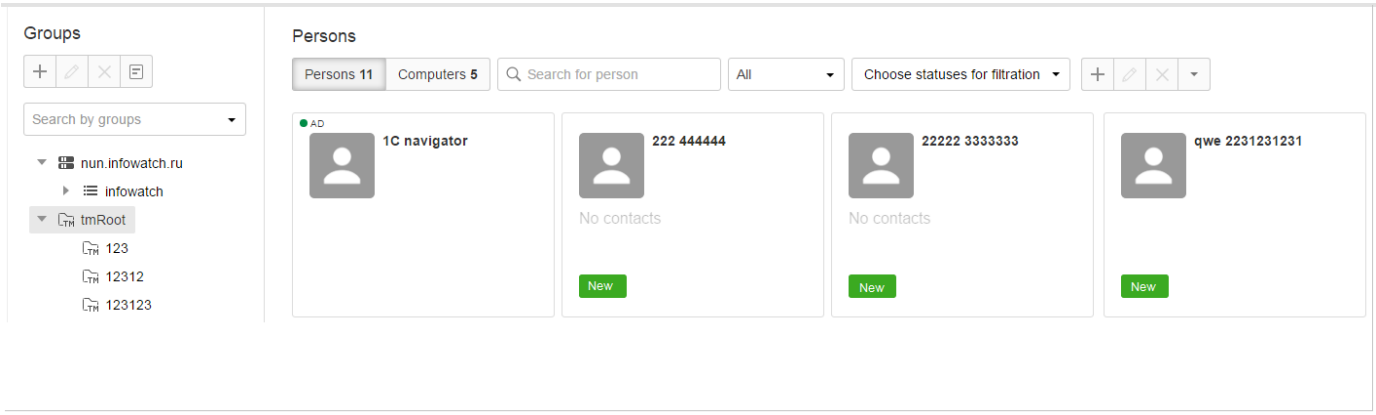
**User's target actions:**

- Adding elements of technologies

# 4.6 Persons Section

**Reference information:**
Lists of users and computers make it easier for the security officer to work with intercepted objects. This is due to the accounting of information about senders, recipients (persons) and computers using special catalogs.

**About the section:**
The section contains a catalog of persons and workstations of the company information system.




**Warning!**

If the number of persons whose events are processed exceeds the number of persons supported by the current license, the following message is displayed at the top of the browser window:
**Attention! The threshold on the number of persons processed by the System is exceeded by 1.**

This is an informational message and it does not affect the functionality of the System.
The number of persons whose events are processed in the System is equal to the number of employees who sent any type of traffic over the last 30 days.
The number of employees allowed by the current license is displayed in the license information, **Licensed users** attribute (for details see the document "*Infowatch Traffic Monitor. Administration Guide*").

When you select a group in the list, the right part of the workspace displays persons and computers of this group. To view the list of persons and computers, use **Persons** and **Computers** tabs respectively.

To search for desired persons or computers by the name or IP address, use **Search for person** field.

When searching for required persons and computers, you can use the following filters:

- selecting active/inactive persons and computers (obtained from Active Directory);
- filtering by the presence of screenshots;
- choosing persons and computers with a specific status (for details, see "Statuses").

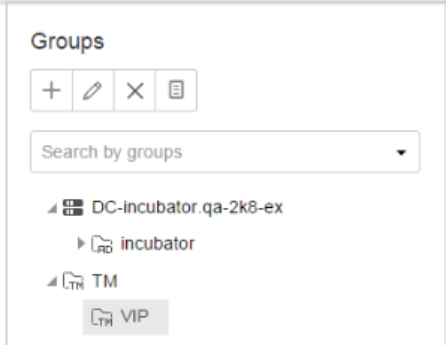
The toolbar in the left part of the workspace is used for working with groups, while the toolbar in the right part of the workspace allows you to work with persons and computers within a selected group.

**User's target actions:**

- Creating a group of persons and computers (see “Creating Group of Persons and Computers")
- Creating a list of persons and computers (see “Creating List of Persons and Computers")
- Viewing widgets with information on persons and computers (see "Viewing Summary on Person or Computer")
- Creating a filter by persons and computers (see "Viewing Summary on Person or Computer")
- Creating a policy for persons and computers (see "Adding Person or Computer to Policy")
- Managing statuses of persons and computers (see "Adding Status to Person or Computer")
- Viewing screenshots for persons and computers (see "Viewing Screenshots")
- Adding persons and computers in perimeters (see "Adding a Person or Workstation to Company Perimeter")

## 4.6.1 Group of Persons and Computers

The left part of **Persons** section displays groups of persons and computers.




You can add groups of persons and computers from Active Directory, Domino Directory, or create them in Traffic Monitor (see "Creating Group of Persons and Computers").

**Note:**

Groups synchronized with Active Directory are marked with .

Groups synchronized with Domino Directory are marked with .

With tools on the toolbar, you can create, edit or delete an earlier created user group.

Groups have the following attributes:

| Parameter | Description |
|---|---|
| Name | Group name |
| Contacts | Group contact information |
| Contains groups | List of groups included in this group |
| Included in groups | List of groups this group is included in |

| Parameter | Description |
|---|---|
| Note | Description in any form |

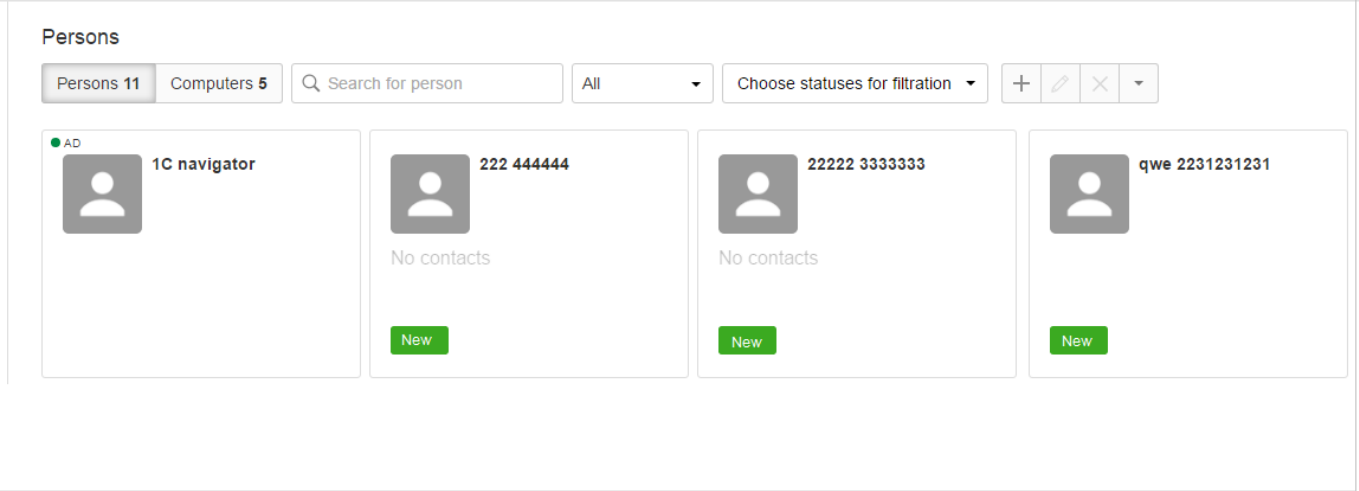
Clicking button opens the form of creating a person control group fo a selected group (for details, see "Creating Person Control Policy").

**User's target actions:**

- Creating Group of Persons and Computers
- Creating Person Control Policy

## 4.6.2 Persons

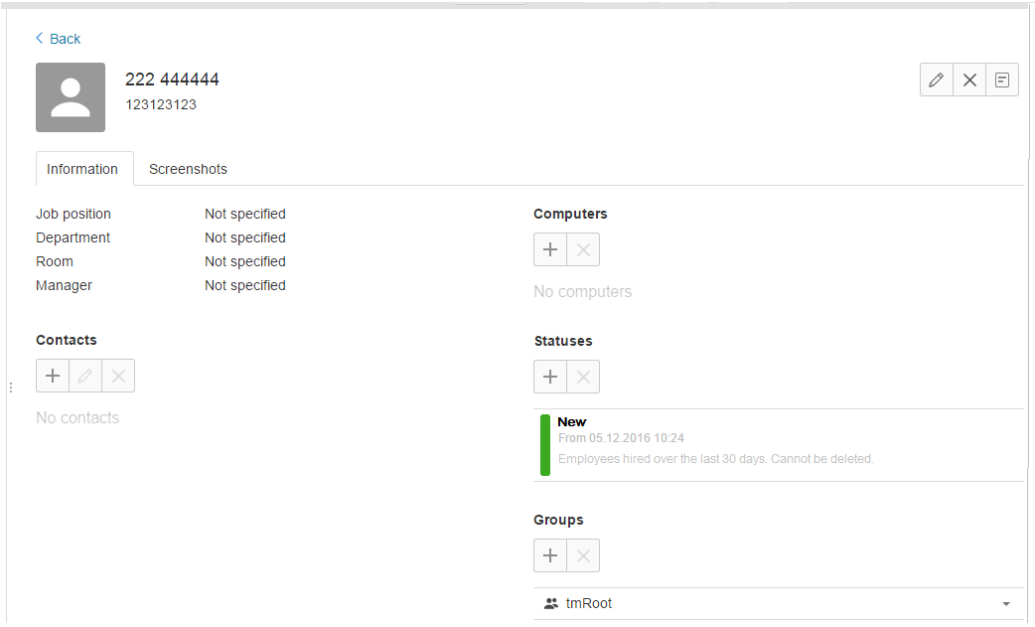
The list of persons included in the selected group (see "Groups of Persons and Computers") is displayed on the **Persons** tab in the right part of the workspace.




**Note:**

For persons whose data is imported from Active Directory, the color indicator appears in the upper left corner of the profile photo:
- for active employees;
- for employees disabled in AD.

To view the person card, double-click the selected person. The person card contains two tabs: **Information** and **Screenshots**.




The **Information** tab contains the following attribute of the person:

- Job position
- Department
- Room
- Manager
- Contacts (you can specify personal or working contacts of the person including email, phone number, Skype login, ICQ or web address in the Internet)
- Computers (computers linked with the person account)
- Statuses (statuses assigned to the person)
- Groups (groups which include the person)

To change these attributes, as well as **Name**, **Last name**, **Member of company** attributes or to edit the person's photo, use button in the right part of the workspace.

On the **Screenshots** tab, you can view screenshots included in events for this person (see "Screenshots").

To return to the list of persons, click **< Back**.

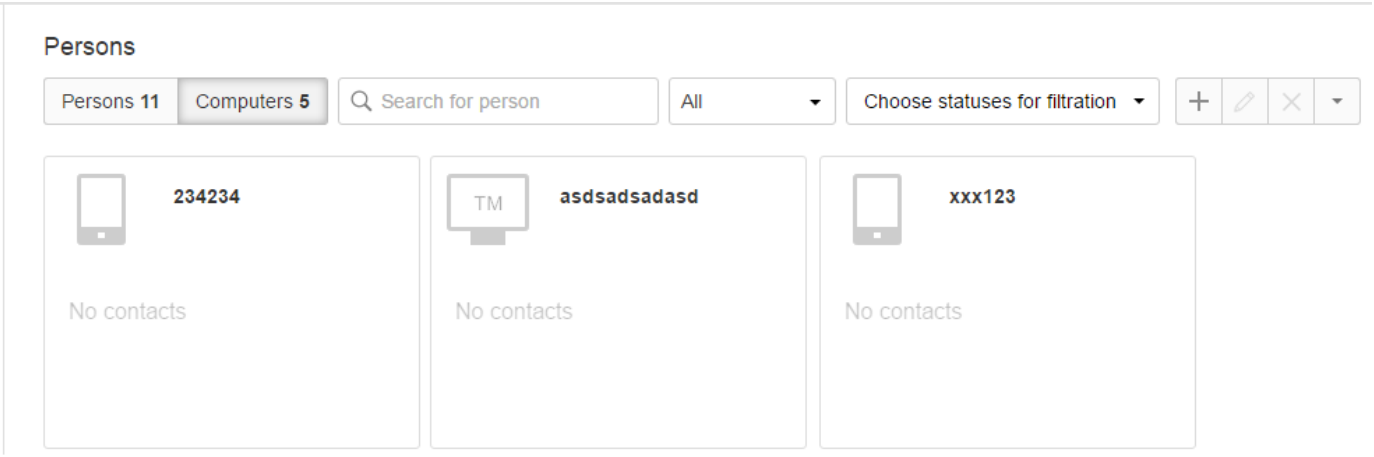
The button allows you to switch to the "Policies" section to create a policy for the selected person.

**User's target actions:**

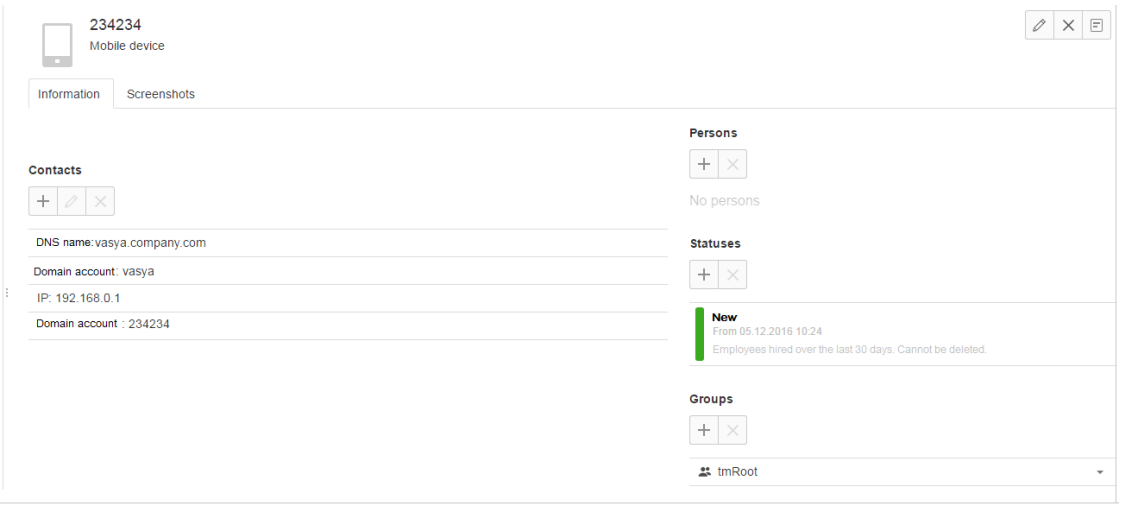
- Working with groups of persons (see "Creating Group of Persons and Computers")
- Viewing widgets with information on persons and computers (see "Viewing Summary on Person or Computer")
- Creating a filter by persons (see "Viewing Summary on Person or Computer")
- Configuring the card of a person (see "Configuring Person Card")
- Creating a policy for persons (see "Adding Person or Computer to Policy")

- Managing statuses of the person (see "Adding Status to Person or Computer")
- Added the person to a perimeter (see "Adding Person or Computer to Company Perimeter")
- Viewing screenshots for a person (see "Viewing Screenshots")

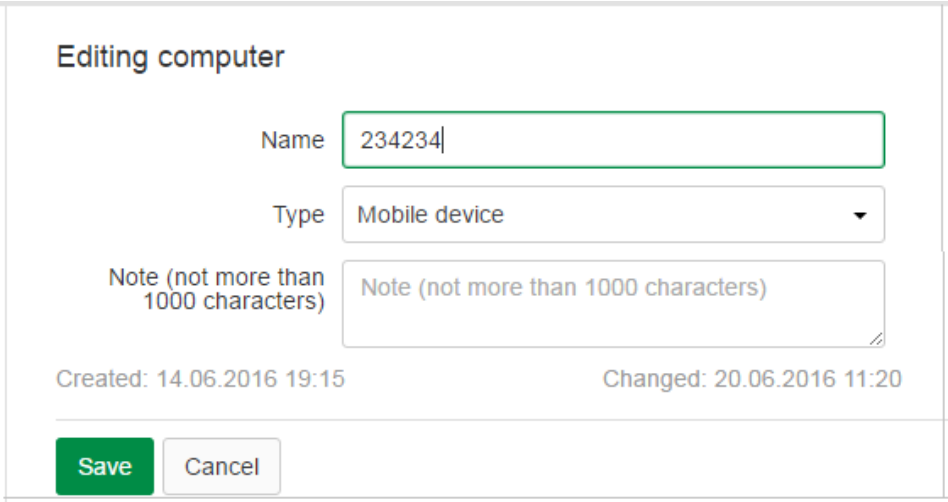
## 4.6.3 Computers




Example of a list of computers




Example a computer card




Editing computer properties

Computer attributes:

| Parameter | Description |
|---|---|
| Name | Computer name |
| Type | Computer type. Possible values: Workstation, Mobile device, Terminal server |
| Note | Optional description |
| Contacts | Computer identifier in the network:<br>• IP<br>• DNS<br>In the first field, specify IP or DNS name (depending on the selected option). In the second field, add a comment if necessary. |
| Persons | Persons to whose accounts the computer is linked |
| Groups | Groups the computer is included in |
| Statuses | Statuses, which the security officer assigns to the computer |
| Screenshots | Screenshots made for the computer |

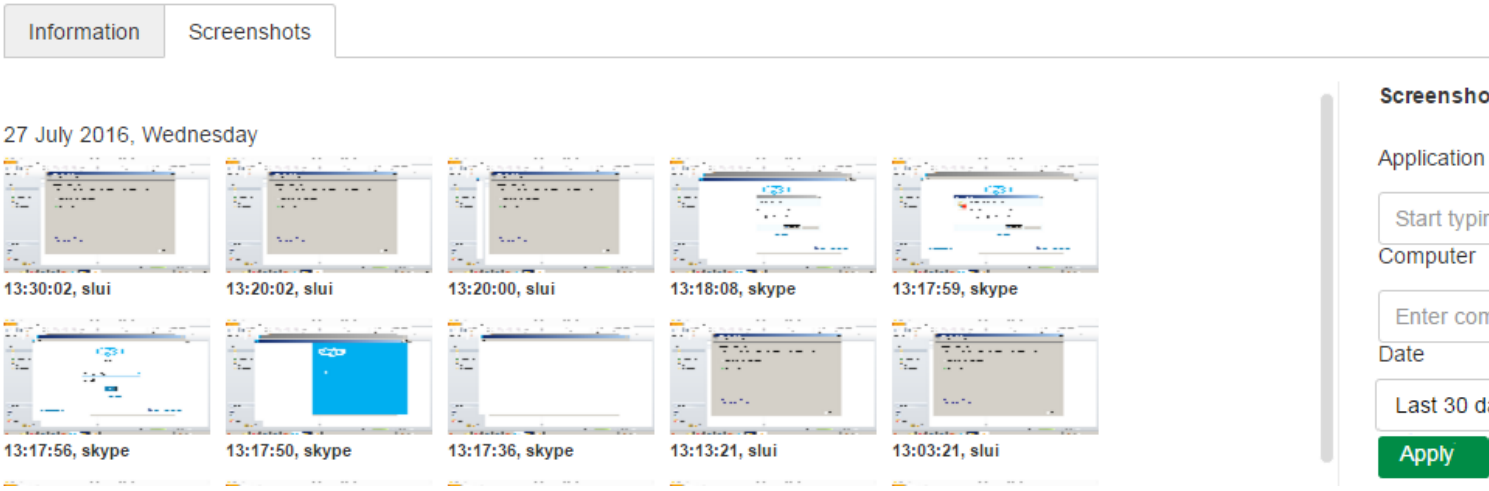
**User's target actions:**

- Managing groups of computers (see "Creating Group of Persons and Computers")
- Managing computers (see "Creating List of Persons and Computers")
- Viewing widgets with information on computers (see "Viewing Summary on Person or Computer")
- Creating a filter by computers (see "Viewing Summary on Person or Computer")
- Creating a policy for computers (see "Adding Person or Computer to Policy")
- Managing statuses computers (see "Adding a Status to Person or Computer")
- Defining computers included in perimeters (see "Adding Person or Computer to Company Perimeter")
- Viewing screenshots for a computer (see "Viewing Screenshots")

## 4.6.4 Screenshots

Cards of persons (see "Persons") and computers (see "Computers") contain **Screenshots** tab, where you can view information about screenshots for a selected person or computer.

You can also go to screenshots from "Events" section when you view information about a person or computer in the brief event viewing form (see "Viewing Brief Event Form").




By default, screenshots for all dates and for all applications are displayed. Screenshots are sorted by date.

The **Application**, **Computer**/**Person** and **Date** filters allow you to search screenshots by specified conditions.

Clicking a screenshot opens its enlarged image and attributes:

- **Person** - a person who made the screenshot;
- **Computer** - a computer where the screenshot was made;
- **Time** - date and time when the screenshot was made;
- **Application** - the application that was active when the screenshot was made.

You can use tools in the right part of the workspace to change the image scale (**+** and **-** buttons) or save the image to your computer ( button).

To navigate to the next or the previous image, use **<** and **>** buttons. You can also find the desired screenshot in the list which is located in the lower part of the workspace. To quickly move between elements of the list, hover over the list, hold down the left mouse button and scroll through the list in the desired direction.

To close the viewer and continue working with the selected person or computer, click **X**.

**User's target actions:**

- Viewing Screenshots

# 4.7 Policies Section

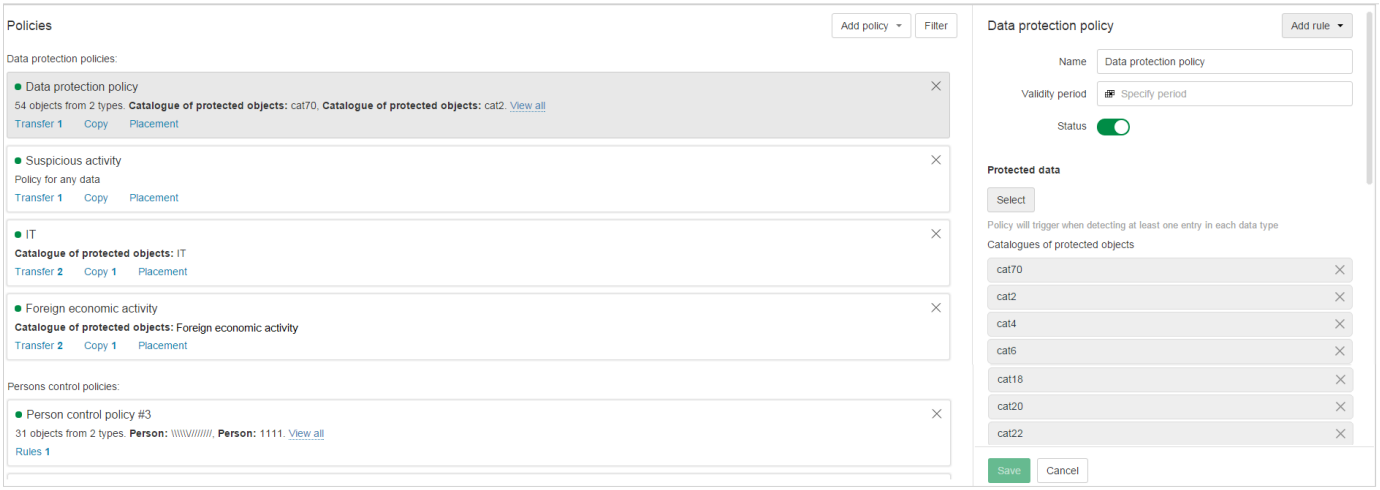
**Reference information:**
***Policies*** are a set of rules according to which analysis and processing of interception objects is performed. The ***rule*** consists of condition sets by which the object is checked and the actions performed when those conditions are fulfilled or not.

**Warning!**

As a result of the analysis, the System will not perform any actions if at least one of the following conditions is met:

- the System has no policies;
- all policies existing in the System are disabled;
- none of the policies in the System have active rules (or the default actions for active policies are not defined).

**About the section:**
The section contains the list of actions performed by the System in response to actions of persons and workstations.




The section contains the following elements:

| Element | Purpose |
|---|---|
| List of policies | Contains available policies.<br>Policies in the list are divided into three groups: data protection policies, data protection policy on agents, and person control policies. |
| Policy viewing form | Contains the attributes of the selected policy |
| Rule viewing form | Allows configuring a rule for the selected policy |
| **Filter** button | Displays the **Filter settings** area |

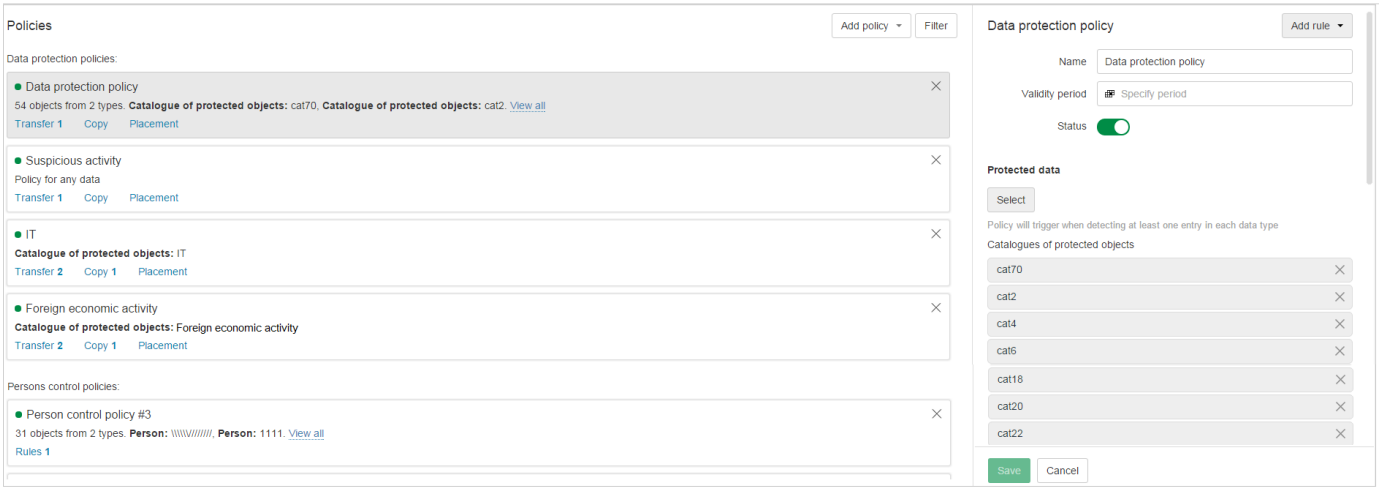
| Element | Purpose |
|---|---|
| **Filter settings** area | Allows filtering policies by specified attributes |
| **Add policy** button  | Allows you to select the type of policy from the drop-down list. Possible values:<br>• Data Protection Policy<br>• Data Protection Policy on Agents<br>• Person Control Policy<br>For the added policy, a viewing form is displayed in the right part of the workspace |
| Policy viewing form | Allows you to specify parameters of the created policy |

**User's target actions:**

- Adding a new policy (see "Creating Data Protection Policy", "Creating Data Protection Policy on Agents", and "Creating Person Control Policy")
- Modifying a previously created policy (see "Editing Policy")
- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")
- Filtering policies (see "Filtering List of Policies")

## 4.7.1 Policies and their Viewing Form

A policy viewing form is displayed in the right part of the workspace when you select a policy in the list.




Policy attributes:

| Parameter | Description |
|---|---|
| Name | Policy name |
| Status | Indicates whether the policy is enabled in the System |
| Period of activity | The time period when the policy applies |

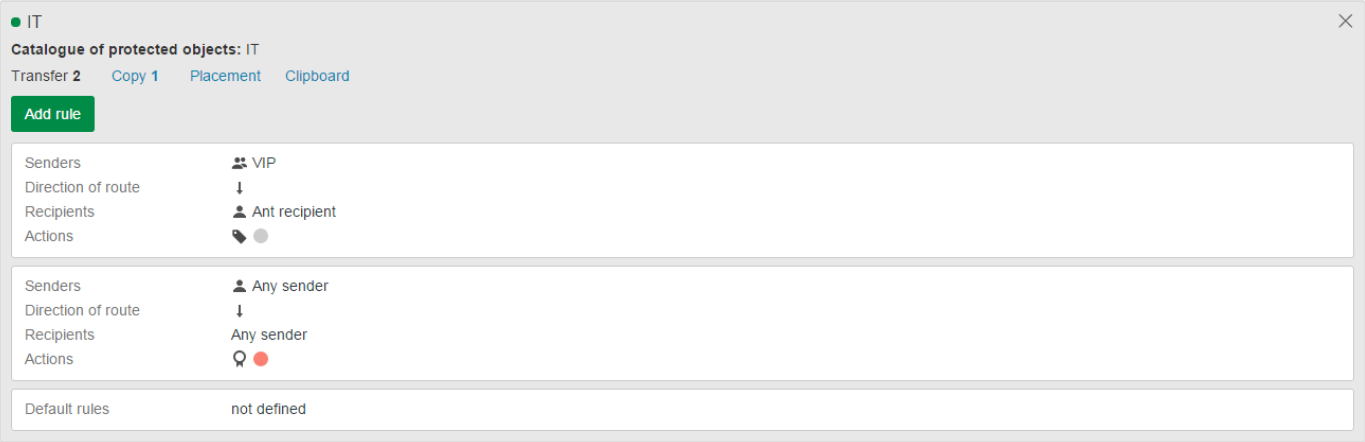
| Parameter | Description |
|---|---|
| Protected data (only for data protection policies) | The list of protected objects, their catalogs, and file formats controlled by the policy |
| Controlled persons (only for a person control policies) | The list of persons, whose actions are controlled by the policy |
| Policy rules | The list of actions which the System performs when the policy is triggered |
| Description | Policy description. An optional parameter. |

**User's target actions:**

- Adding a new policy (see "Creating Data Protection Policy", "Creating Data Protection Policy on Agents", and "Creating Person Control Policy")
- Modifying a previously created policy (see "Editing Policy")

## 4.7.2 Rules and their Viewing Form

Information on the rules is displayed in the tile of the selected policy. Clicking the link with the rule type opens the list of added rules of this type.




When you select a rule in the list, a viewing form for a selected rule is displayed on the right side of the workspace.

In the upper-right corner of the tile, × icon is displayed. Clicking this icon removes the selected rule.

There are four categories of rules for the **data protection policy**:

| The rule | Description |
|---|---|
| Transfer rule | The rule that regulates sending and receiving protected data |
| Copy rule | The rule that regulates copying, printing and photographing protected data |
| Placement rule | The rule that regulates storing protected data |
| Clipboard rule | The rule that regulates using of clipboard |

**Note:**

For the data protection policy on agents, only transfer and copy rules are available.

When creating rules of transfer and rules of copying, in order to select LDAP domain as *Sender* or *Recipient* you should first configure synchronization with the LDAP server and add the domain using the **Groups** tab.

Also, for *Sender* and *Recipient*, you can specify the following options:

| Parameter | Description |
|---|---|
| Contacts | Specify contacts of the traffic senders/recipients. For this, in the first drop-down list on the left, select the contact type:<br> - ICQ account. Integer number from 10000 to 999999999999;<br> - Skype account. String from 6 to 32 characters long, must begin with a letter; may contain only letters, digits, and the characters ".", ",", "-", "_";<br> - mobile phone number. String no less than three characters, can contain only numbers, space and symbols"-","_", "( )","+",".");<br> - landline phone number.String of 3 or more characters,can contain only digits, space, and the characters:"-","_", "( )","+",".");<br> - E-mail address. Address (in RFC format);<br> - Lotus e-mail address. String of 3 or more characters when entering data in the input field, or string of 1 or more characters when entering data in the Senders window(opens when clicking the  button) ;<br> - identifier on a web resource. A string of 3 or more characters when entering data in the input field, or string of 1 or more characters when entering data in the Senders window (opens when clicking the  button) . |
| Groups | Specify groups whose members can be traffic senders/recipients. |
| Persons | Specify persons who can be traffic senders/recipients. |
| Domains | Specify domains whose members can be traffic senders/recipients. |
| Perimeters | Specify perimeters whose elements can be traffic senders/recipients. |

Person control rules regulate actions of selected persons. They also allow you to apply existing data protection policies and data protection policies on agents to selected persons.

**User's target actions:**

- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")

#### 4.7.2.1 Rule of Transfer

Attributes of the rule of transfer

| Parameter | Description |
|---|---|
| Direction of route | There may be two types of directions:<br>→ In single direction - the rule is triggered only when traffic is passed from senders to recipients<br>⇌ In both directions - the rule is triggered when traffic is passed both from senders to recipients and from recipients to senders |
| Event type | The type of traffic that triggers the rule provided that other conditions are satisfied. Possible choices:<br>• Web-message<br>• Email<br>• Webmail<br>• ICQ<br>• XMPP<br>• Mail.ru Agent<br>• Jabber<br>• Skype<br>• MS Lync<br>• Yahoo!<br>• WhatsApp<br>• SMS<br>• Photography |
| Computers | Computers of the sender |
| Senders | If persons or computers from this list send traffic (or traffic leaves specified domains and perimeters), it will (provided that other conditions are satisfied)<br>= ▾ - trigger the rule<br>≠ ▾ - do not trigger the rule |

| Parameter | Description |
|---|---|
| Recipients | If persons, computers, domains or perimeters from this list receive traffic, it will (provided that other conditions are satisfied)<br> - trigger the rule<br> - do not trigger the rule<br><br>**Note:**<br>If you select a protected object based on a graphical object as policy protected data and specify the **Webmail** event type, then the policy can be triggered only if no persons are specified in the **Recipients** field. This restriction is due to the fact that for webmail events, a recipient of enclosures is not an email, but a domain. For example, if a message with enclosures is sent to the `user1@example.com` email address, the enclosure recipient will be the `example.com` domain. Thus, if particular persons are specified as recipients, events with enclosed graphical objects will not be covered by the policy. |
| Rule validity days | The list of days of the week on which the rule can be triggered |
| Rule validity time | The time interval during the day when the rule can be triggered |
| Notify | List of user of the Console who will be notified when the rule is triggered<br>**Note:** If after the rule is created, the user or his e-mail are deleted from the System (on managing user accounts, see *"Administration Guide"*, "Users" section), a notification will not be sent to this user. |
| Inform initiators | Enable this setting if you want to send notifications to traffic senders when the rule is triggered. By default, this setting is disabled. |
| Assign verdict to event | A verdict which will be assigned to the object when the rule is triggered. Possible values: *Allow*, *Block*, *Quarantine*. |
| Assign violation level to event | A violation level that will be assigned to the object when the rule is triggered. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Assign tags to event | The list of tags which will be assigned to the object when the rule is triggered (see "Tags") |
| Assign status to initiators | A status that will be assigned to senders when the rule is triggered (see "Statuses") |
| Delete event | If this option is selected, then the event will not be saved to the database and the actions specified in the rule will not be performed. By default, this setting is disabled. |

**User's target actions:**

- Adding rules to the policy (see "Creating Rule")

- Modifying previously created rules (see "Editing Rules")
- Adding actions to the policy (see "Determining the System Response to Rule Violations")

### 4.7.2.2 Rule of Copying

Attributes of the rule of copying:

| Parameter | Description |
|---|---|
| Event type | The type of traffic copying which triggers the rule provided that other conditions are met.<br>Possible choices:<br>• Copying to an external device<br>• FTP<br>• Stamp<br>• Photography |
| Computers | The list of computers copying the traffic who (provided that other conditions are met) trigger the rule |
| Senders | The list of persons and workstations copying the traffic who (provided that other conditions are met)<br>= - trigger the rule ≠ - do not trigger the rule |
| Rule validity days | The list of days of the week on which the rule can be triggered |
| Rule validity time | The time interval during the day when the rule can be triggered |
| Notify | List of user of the Console who will be notified when the rule is triggered<br>**Note:** If after the rule is created, the user or his e-mail are deleted from the System (on managing user accounts, see *"Administration Guide"*, section "Users"), a notification will not be sent to this user. |
| Assign violation level to event | The violation level which will be assigned to the object when the rule is triggered. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Assign tags to event | The list of tags which will be assigned to the object when the rule is triggered (see "Tags") |
| Assign status to initiators | The status which will be assigned to senders when the rule is triggered (see "Statuses") |
| Delete event | If this option is selected, then the event will not be saved to the database and actions specified in the rule will not be performed. By default, this setting is disabled. |

**User's target actions:**

- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")
- Adding actions to the policy (see "Determining System Response to Policy Violations")

### 4.7.2.3 Rule of Placement

Attributes of the rule of placement

| Parameter | Description |
|---|---|
| Event type | The type of traffic the placement of which triggers the rule provided that other conditions are met. Possible choices:<br>• Crawler |
| Storage | Storing secured data in these storages will:<br> - trigger the rule<br> - do not trigger the rule<br>**Note:**<br>When adding a network resource, use the following format:<br>`//<workstation>/<directory>`<br>where<br>• `<workstation>` is a workstation name;<br>• `<directory>` is a target folder on the workstation.<br>When you add a file storage, enter the following values:<br>• in the **Enter a source** field, enter an IP address or DNS name of the file storage;<br>• in the **Enter a path to storage** field, enter the path to the storage that will be controlled by the policy (using wildcards such as ? or * is not supported). |
| File owners | The rule is triggered when specified persons, groups or elements of perimeters are detected among file owners.<br>If the attribute is denied, the rule is triggered when persons, groups or elements of perimeters not included in the list are detected among file owners. |
| Who has access to file | The rule is triggered if specified persons, groups, and elements of perimeters have access to the file.<br>If the attribute is denied, the rule is triggered when persons, groups or elements of perimeters not included in the list have access to the file. |
| Notify | List of the Console users who will be notified when the rule is triggered<br>**Note:** If after the rule is created, the user or his e-mail are deleted from the System (on managing user accounts, see *"Administration Guide"*, section "Users"), a notification will not be sent to this user. |
| Assign violation level to event | A violation level which will be assigned to the object when the rule is triggered. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Assign tags to event | The list of tags which will be assigned to object when the rule is triggered (see "Tags") |
| Assign status to initiators | A status which will be assigned to senders when the rule is triggered (see "Statuses") |

| Parameter | Description |
|---|---|
| Delete event | If this option is selected, then the event will not be saved to the database and actions specified in the rule will not be performed. By default, this setting is disabled. |

**User's target actions:**

- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")
- Adding actions to the policy (see "Determining the System Response to Rule Violations")

### 4.7.2.4 Clipboard Rule

Attributes of the clipboard control rule:

| Parameter | Description |
|---|---|
| Persons | List of persons, their groups, and perimeters. When traffic is sent by specified persons or groups or leaves specified perimeters, it will (provided that other conditions are met):<br> - trigger the rule;<br> - not trigger the rule. |
| Computers | When traffic is sent from specified computers, it triggers the rule |
| Terminal session | Selecting this option means that the receiver application for the event should be a terminal session. If the option is selected, choosing the receiver application manually is unavailable. |
| Source application | When copying data from specified applications to clipboard (provided that other conditions are met), it will:<br> - trigger the rule;<br> - not trigger the rule |
| Receiver application | When pasting data from clipboard to specified applications (provided that other conditions are met), it will:<br> - trigger the rule;<br> - not trigger the rule<br>**Note**: if **Terminal session** parameter is enabled, selecting the receiver application is unavailable. |
| Rule validity days | Days of the week when the rule can be triggered |
| Rule validity time | Time interval during the day when the rule can be triggered |

| Parameter | Description |
|---|---|
| Notify | List of the Console users who will be notified when the rule is triggered<br>**Note:** If, after the rule is created, the user or user e-mail are deleted from the System (on managing user accounts, see *"InfoWatch Traffic Monitor. Administration Guide"*, "Users" section), this user will get a notification. |
| Assign violation level to event | A violation level assigned to the object when the rule is triggered. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Assign tags to event | The list of tags assigned to the object when the rule is triggered (see "Tags") |
| Assign status to initiators | The list of tags assigned to the object when the rule is triggered (see "Tags") |
| Delete event | If this option is selected, then the event is not saved to the database and actions specified in the rule are not performed. By default, this setting is disabled. |

**User's target actions:**

- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")
- Adding actions to the policy (see "Determining the System Response to Rule Violations")

### 4.7.2.5 Person Control Rule

Attributes of the person control rule:

| Parameter | Description |
|---|---|
| Violation level | Events with a specified violation level will be intercepted |
| Connect with policy | Data protection policies and data protection policies on agents which trigger the rule when the policy itself is triggered (assuming that the violation level matches the value specified in the **Intercept with violation level** field) |
| Notify | List of the Console users who will be notified when the rule is triggered<br>**Note:** If, after the rule is created, the user or user email are deleted from the System (on managing user accounts, see *"Administration Guide"*, "Users" section), a notification will not be sent to this user. |
| Assign verdict to event | A verdict which will be assigned to the object when the rule is triggered. Possible values: *Allow*, *Block*, *Quarantine*. |
| Assign violation level to event | A violation level which will be assigned to the object when the rule is triggered. Possible values: *High*, *Medium*, *Low*, *No violation*. |
| Assign tags to event | The list of tags which will be assigned to the object when the rule is triggered (see "Tags") |
| Assign status to initiators | A status that will be assigned to initiators of the event when the rule is triggered (see "Statuses") |

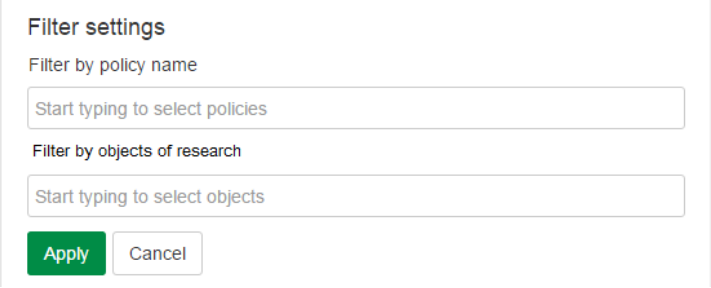
| Parameter | Description |
|---|---|
| Delete event | If this option is selected, then the event will not be saved to the database and actions specified in the rule will not be performed. By default, this option is disabled. |

**User's target actions:**

- Adding rules to the policy (see "Creating Rules")
- Modifying previously created rules (see "Editing Rules")
- Adding actions to the policy (see "Determining System Response to Rule Violations")

## 4.7.3 Filter Settings area

The area is displayed when clicking the **Filter** button in the **Policies** section.




Filter attributes:

| Parameter | Description |
|---|---|
| Filter by policy name | Filtering is based on specified policies |
| Filter by objects | Filtering is based on specified secured data |

**User's target actions:**

- Filtering policies (see "Filtering the List of Policies")

## 4.7.4 Policy Adding Form

Policy attributes are described in "Policies and their Viewing Form". When you create a new policy, you can specify protected data (for a data protection policy and a data protection policy on agents) and controlled persons (for a person control policy).

The appearance of the form for adding policy differs depending on the selected type:

| Policy type | Description of the form for adding a policy |
|---|---|
| Data Protection Policy | When selected, a new policy is added to the list of data protection policies (or data protection policies on agents), and, on the right side of the workspace, a policy viewing form is displayed. |

| Policy type | Description of the form for adding a policy |
|---|---|
| Data Protection Policy on Agents | Clicking the **Select** button opens a dialog box where you can specify secured data from the following categories:<br>• Catalog of protected objects<br>• Protected objects<br>• File format |
| Person Control Policy | When selected, a dialog box appears where you can specify senders whose actions are controlled by this policy. You can select individual persons, groups of persons, or persons with a particular status. |

**User's target actions:**

- Adding a data protection policy (see "Creating Data Protection Policy"
- Adding a data protection policy on agents (see "Creating Data Protection Policy on Agents")
- Adding a person control policy (see "Creating Person Control Policy")

# 4.8 Lists Section

**Reference information:**
***Lists*** are sets of similar data used for creating policies. They can be preinstalled or generated by means of the Management Console.

**About the section:**
Contains editable catalogs of tags, web resources, statuses, and perimeters and an uneditable list of files.



| | Name | Description |
|---|---|---|
| ● | Fired | Employees who have worked for the company before. |
| ● | New | Employees hired over the last 30 days. Cannot be removed. |
| ● | On probationary period | Employees on probationary period. |
| ● | To fire | Employees who filed an application for dismissal. |
| ● | Under supervision | Employees under close attention of Security Officers. |

**Lists** section, the list of statuses

The section contains the following elements:

| Element | Purpose |
|---|---|

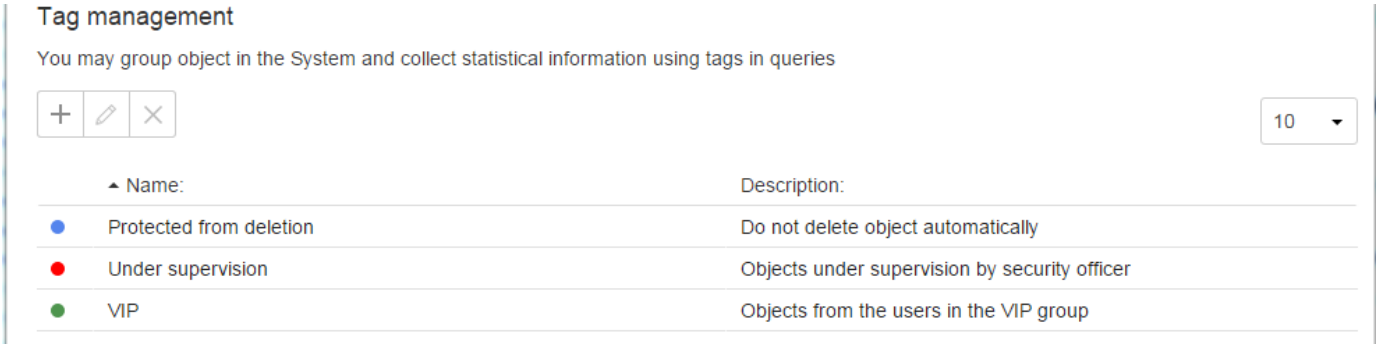
| Element | Purpose |
|---|---|
| Tabs of different types of catalogs<br>• Tags<br>• Web resources<br>• Statuses<br>• Perimeters<br>• List of files | Contain lists of elements and tools for a selected catalog |
| List of elements for a selected catalog | Opens when you select a catalog. Contains a list of catalog elements. For perimeters, web resources, and files, elements are arranged in groups |
| Page navigation panel | A set of buttons for browsing pages with entries (if not all entries can be placed on one page) |
| Toolbar | A set of tools for managing catalogs |

**User's target actions:**

- Creating a list of tags (see "Managing Tags")
- Creating a list of resources (see "Managing Web Resources")
- Creating a list of statuses (see "Managing Statuses")
- Building perimeters (see "Managing Perimeters")
- Adding file formats to policy (see "Creating Data Protection Policy" and "Creating Data Protection Policy on Agents")

## 4.8.1 Tags

**Reference information:**
***Tag*** is a mark which gives a brief characteristic of the intercepted object.




Tag attributes:

| Parameter | Description |
|---|---|
| Color | Color marker which is added together with the tag |

| Parameter | Description |
|---|---|
| Name | Tag name |
| Description | Optional note |

There are the following preset tags in the System:

- **Protection from deletion** - Events that are not removed during the process of releasing space in the database

> **Note:**
>
> This tag is only available for Traffic Monitor Standard based on Oracle Standard (for more information, see "*Infowatch Traffic Monitor. Administration Guide*")

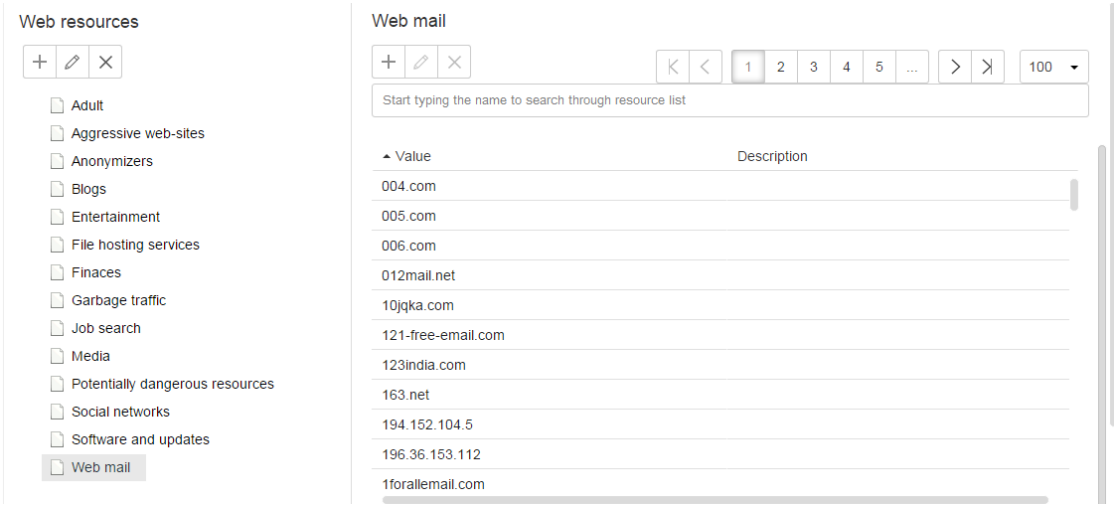
- **Under supervision** - Events that indicate employees' suspicious activity
- **VIP** - Events from persons who belong to the VIP group

**User's target actions:**

- Creating a list of tags (see "Managing Tags")

## 4.8.2 Web Resources

**Reference information:**
***Web** resources* are a set of Internet resources, which are treated by the System as inappropriate use of working time.




The System includes the following preset lists of web resources:

- Anonymizers
- Blogs

- Web mail
- Media
- Software and updates
- Job search
- Potentially dangerous resources
- Entertainment
- Aggressive web-sites
- Social networks
- Adult
- File hosting services
- Finance

When you select a list, its elements are displayed on the right. Using tools in the right part of the workspace, you can add, edit or delete elements of the list.

When you create or edit a web resource, you can specify the following attributes:

| Parameter | Description |
|---|---|
| Value | Web resource name |
| Description | Optional note |

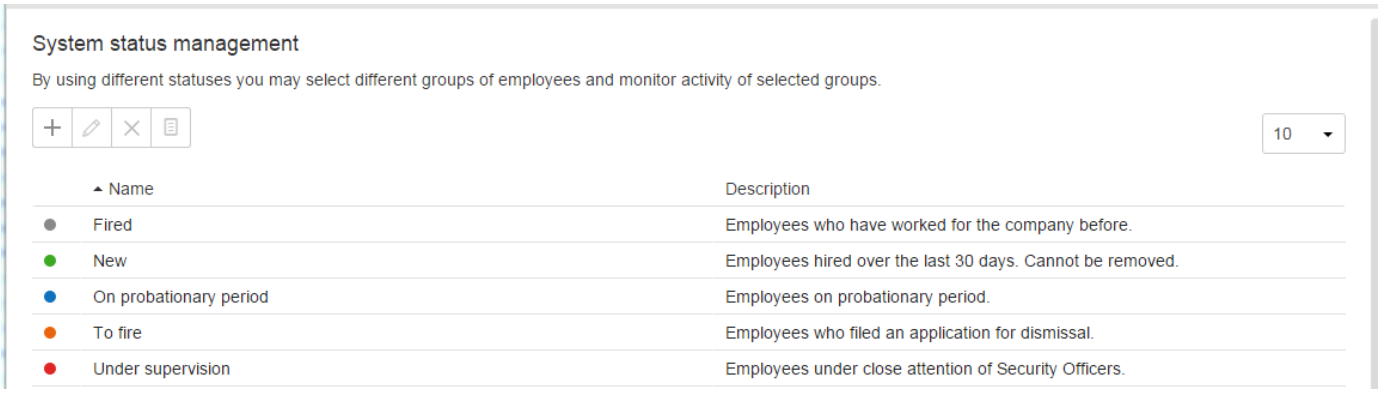
**User's target actions:**

- Creating a list of resources (see "Managing Web Resources")

## 4.8.3 Statuses

**Reference information:**
The person ***status*** is a label which can be created in one of the following ways:

- automatically assigned to a person according to the status of a user or workstation imported from Active Directory, or
- manually assigned to a person by Security officer, or
- automatically assigned to a sender as a result of rule triggering.




The statuses *On probationary period*, *To fire*, *New*, *Under supervision*, and *Fired* are preset in the System.

**Note:**

The *New* status cannot be deleted.

Attributes of the person status:

| Parameter | Description |
|---|---|
| Color | Color mark added together with the status |
| Name | Status name |
| Description | Status description. Optional parameter |

**User's target actions:**

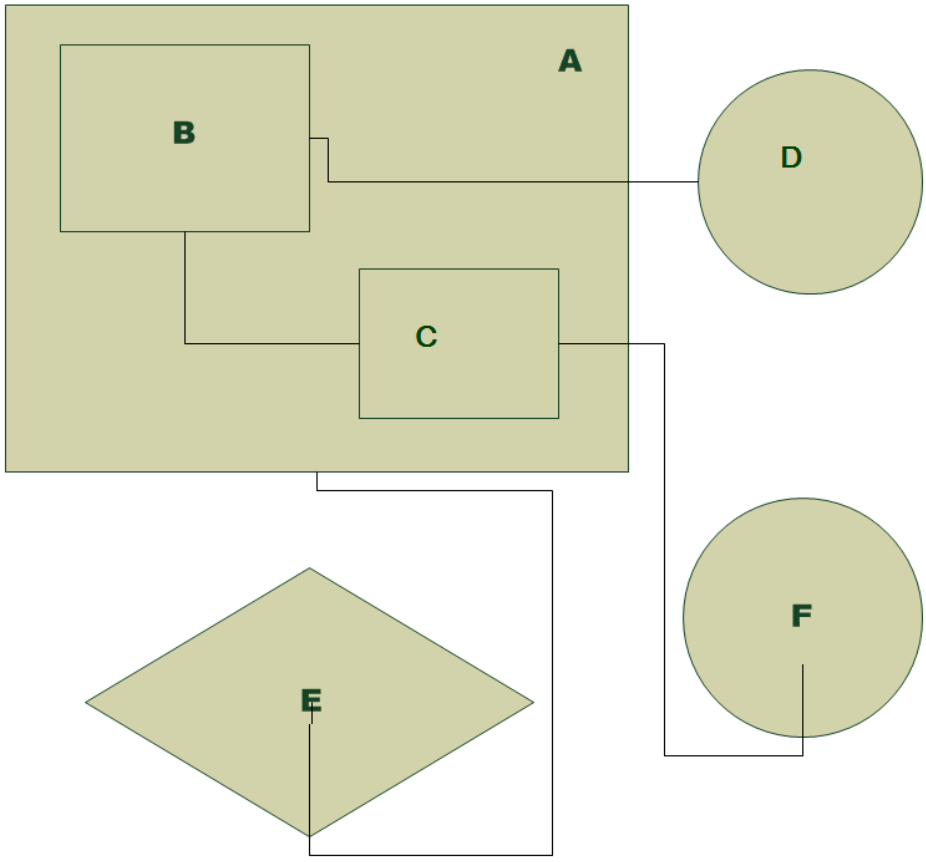
- Creating a list of statuses (see "Managing statuses")
- Manual assigning status to a person or workstation to monitor its activities or to visually distinguish them (see "Adding a Status to Person or Workstation")
- Automatic assigning status to a sender when the rule is triggered (see "Rules and their Viewing Form", **Set status** attribute)
- When creating a Person Control Policy - selecting persons and workstations with particular statuses as objects of research (see "Creating Person Control Policy")

## 4.8.4 Perimeters

**Reference information:**
***Perimeter*** is a container of company infrastructure elements (employees, workstations, domain and so on) and contact information. The perimeter is used to logically divide your organization into structural elements and track the traffic of each element.

**For example:**

- There is a company with infrastructure A which contains subdivisions B and C;
- The company interacts with organizations D, E, F.

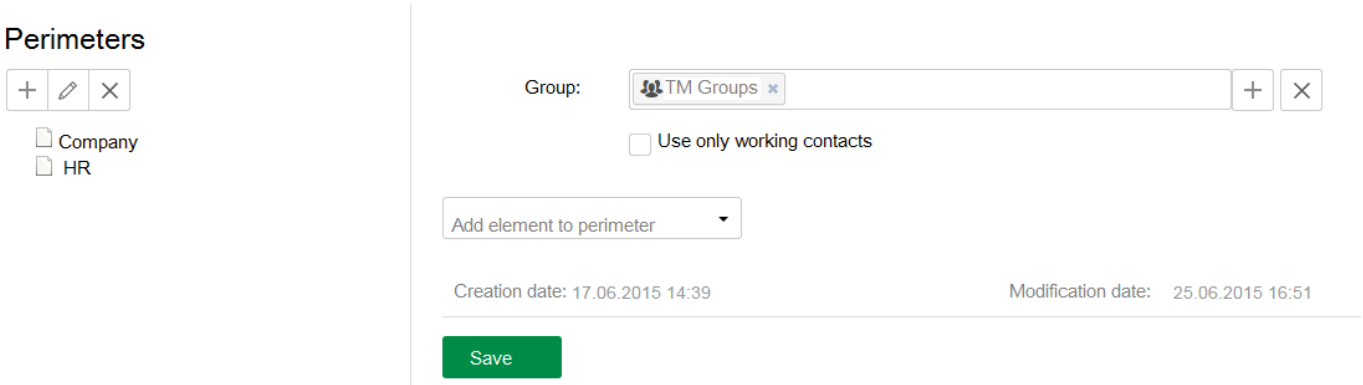



By building perimeters for all named objects (A, B, C, D, E, F), the security officer can configure traffic control:

- inside the company (within the perimeter A)
- outside the company (between the perimeter A and one of the perimeters D, E or F)

**Warning!**

For more flexible work with structural elements, we recommend allocating smaller perimeters in larger ones (in this example - the perimeters B and C are parts of the perimeter A).




The System includes the following preset perimeters:

- *Company* - to control sending data out of the company

- *Exclude from interception* - to be used in the preset policy *Excluding from Interception* (see "Policy that Excludes Mailing Lists from Interception")

Perimeter attributes:

| Parameter | Description |
|---|---|
| Name | The name of the perimeter |
| The list of elements | Elements within the perimeter<br>**Warning!**<br>When adding persons or groups to a perimeter, the **Use only work contacts** option is available. Example of usage: if the option is selected, sending messages from employees' personal mailboxes will not be treated as sending data out of the perimeter. |
| Creation date | The date and time when the perimeter was created |
| Modification date | Date and time of the last modification of the perimeter |

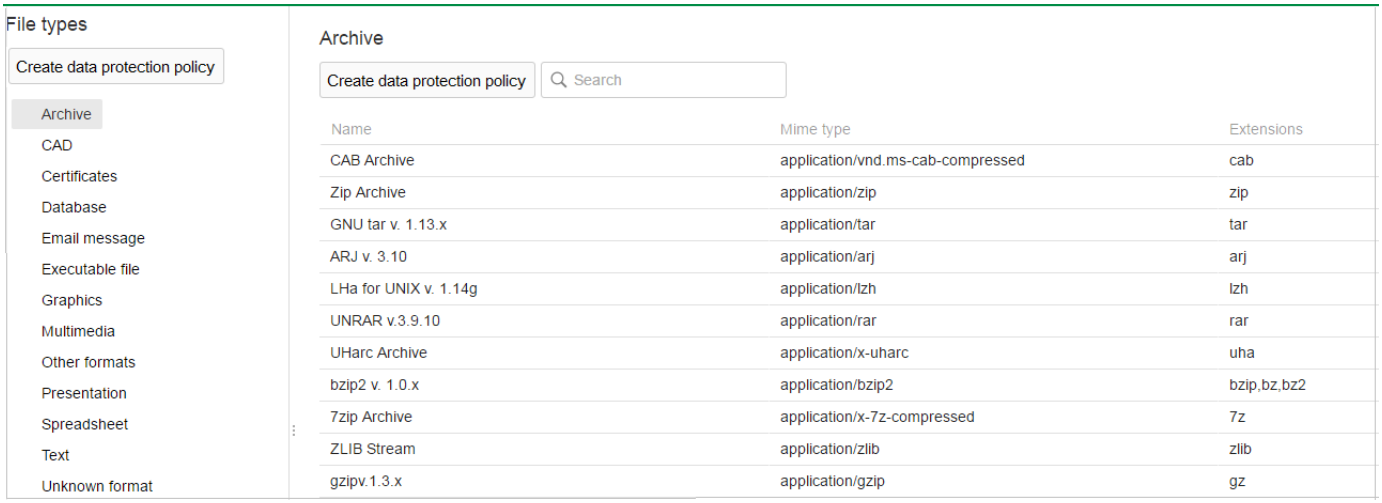
**User's target actions:**

- Building perimeters (see "Managing perimeters")

## 4.8.5 File Types

**Reference information:**

***File types*** are a set of files that are detected in the System.




Files of different formats are divided into groups depending on the subject area. For example, the **Archive** type contains files in ZIP, RAR and other formats.

The tab contains the following elements:

| Element | Purpose |
|---|---|
| The list of file types | Located in the left part of the workspace. Contains a set of subjects that use one or more file formats. |

| Element | Purpose |
|---|---|
| List of formats of the selected type | Located in the right part of the workspace. Contains a list of attributes for all files of the selected type that are detected in the System. This is a table with the following attributes: **Name**, **MIME type**, and **Extension**. |
| **Create data protection policy** button | A button for adding a new policy for the selected file type or format. Click the button and, in the drop-down list, select the required action:<br>• Create data protection policy<br>• Create policy on agent<br>A policy creation form for the selected file format will open in the "Policies" section.<br>**Note:**<br>For formats, analysis of which is not supported in Device Monitor, **Create policy on agent** item is unavailable. |

**Warning!**

The list of file types is defined by the System and cannot be modified.

**User's target actions:**

- Adding file types to policies (see "Creating Data Protection Policy" and "Creating Data Protection Policy on Agents")

# 4.9 Crawler Section

**Reference information:**
The Crawler subsystem of InfoWatch Traffic Monitor system allows you to check files in the corporate network for violations of the corporate security policies. Therefore InfoWatch Crawler allows to monitor file resources to detect and prevent unauthorized usage of confidential data.

InfoWatch Crawler provides the following functions:

- Scanning network folders open for remote access by using the SMB protocol.
- Scanning local drives of workstations under Windows OS.
- Scanning the SharePoint file storage. Examines documents stored in Microsoft SharePoint 2007/2010/2013 database. Considers only the current versions of files: change log is not investigated.
- Customizing scan settings: speed of files downloading from scanned resources and settings of file queue to load objects to Traffic Monitor server.
- Creating a scan job where you can specify:
    - the list of folders and network nodes, where the scanning will be performed;
    - masks of processed files;
    - restrictions on the size of processed files;

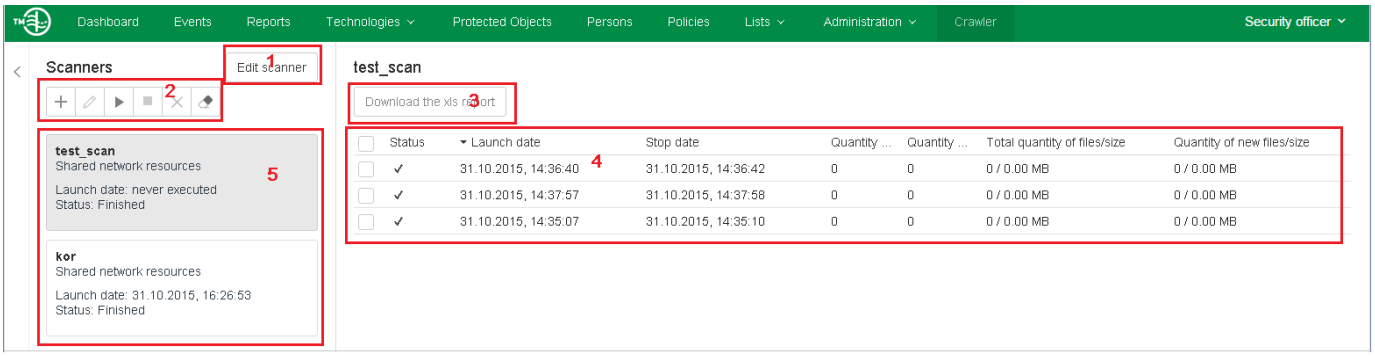
- schedule of job launching (you can also start it manually).

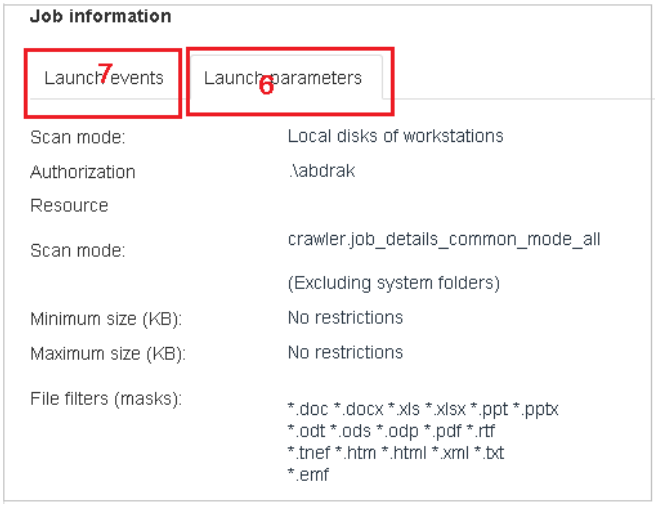
- Selection of only new and changed files: previously processed files do not send to the InfoWatch Traffic Monitor server.
- Transferring files to the InfoWatch Traffic Monitor server for analysis with user-defined sending parameters.
- Saving files according to the policy settings (by default only incidents are stored - files, recognized as the potential violation of the security policy)
- Representing the scanning results in the Management Console: using object queries and reports (including preset ones).

InfoWatch Crawler does not delete, move, rename, encrypt, or any other action on files - even when they recognized as a potential violation. The Crawler performs only informing of the security officer about the incident: the InfoWatch Traffic Monitor Management Console provides viewing files, recognized as a potential violation, with detailed information on their location and users who have access to it.

Managing Crawler is performed in InfoWatch Traffic Monitor Management Console, in the **Crawler** section.

**About the section:**
The section contains tools for creating, editing, and running jobs for the Crawler subsystem.




The section contains the following elements:

| № on scheme | Element | Purpose |
|---|---|---|

| № on scheme | Element | Purpose |
|---|---|---|
| 1 | Button of scanner editing | When clicked, on the right part of the workspace the form of scanner editing is displayed |
| 2 | Toolbar | Set of tools for scan jobs |
| 3 | **Download xls report** button (see ""Saving Scan Report") | Allows you to save a report on the task execution in XLS format |
| 4 | Field of viewing the history of launching the scan job (see “Launch History") | Provides information about stages of scan job execution |
| 5 | List of scan jobs (see “Scanning Job") | Contains a list of scan jobs for the selected scanner |
| 6 | **Launch parameters** tab | Displays data on selected scan job |
| 7 | **Launch events** tab | Provides information about scanning events: the date and time the event occurred, and the message with the content of the event |

**User’s target actions:**

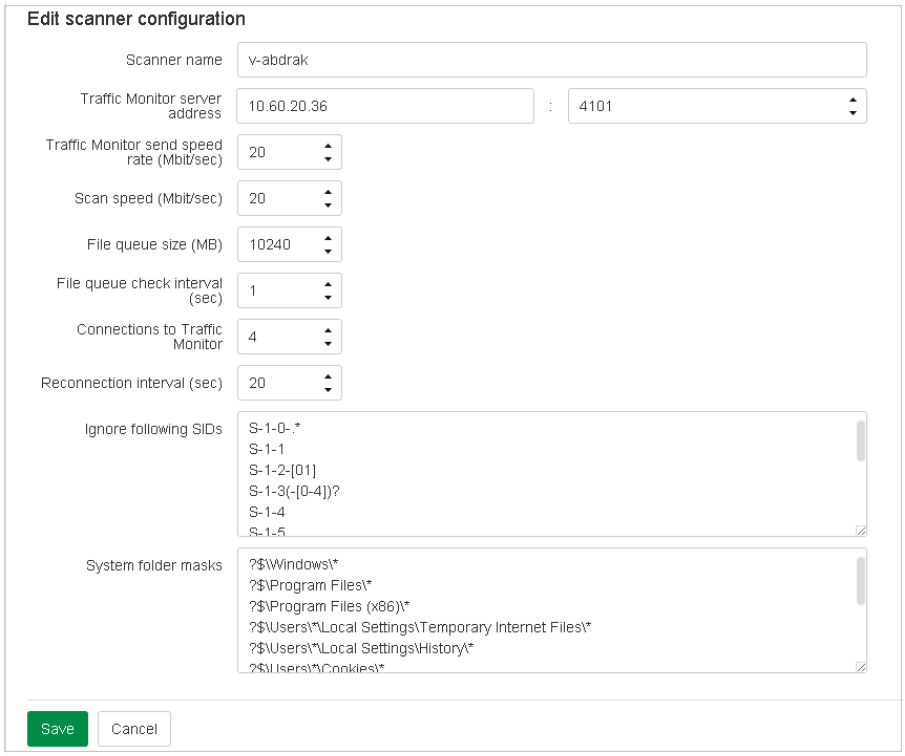
- Editing scanners installed in the System (see "Configuring Scanner")
- Creating the scanning job (see "Creating a Job")
- Starting and stopping the scanning job (see "Launching and Stopping the Job")
- Modifying the scanning job (see "Editing the Job")
- Cleaning the hash base of scanning jobs (see "Cleaning the Hash Base")
- Viewing the history of scanning jobs (see "Viewing Launch History")
- Saving the report of completing the scan job to the hard disk (see "Saving Scan Report")

## 4.9.1 Scanner

**Reference information:**
***Scanner*** is the module of Crawler subsystem which scans data storages (such as Microsoft SharePoint 2007/2010/2013 storage, local disks of workstations, and shared network resources) defined by user by means of scan jobs.

**Note:**

When scanning Sharepoint repository it is important, that Sharepoint and Scanner are located in the same domain.




Scanner attributes:

| Parameter | Description |
|---|---|
| Scanner name | The name of the scanner |
| TM server address | The IP-address of the Traffic Monitor server hosting `iw_expressd` |
| Traffic Monitor sending speed (Mbit/s) | Maximum speed of uploading files to the Traffic Monitor server, Mbit/s<br>Allows reducing the load on the Traffic Monitor server if the number of transmitted files is large |
| Scanning speed (Mbits/sec) | Maximum speed of downloading files from scanned resources to temporary storage (Mbits/sec)<br>Allows reducing the load on the workstation on which scanning is performed |
| Size of the file queue (MB) | The maximum total size of the queue that stores detected files before sending them to the Traffic Monitor server, MB<br>**Warning!**<br>When the maximum total size is reached, the jobs are stopped and all files from this buffer are deleted without sending them to Traffic Monitor. |
| Interval of checking the queue (sec) | Interval (in seconds) at which the Crawler server will check for objects in the queue to be uploaded to the Traffic Monitor server. If there is at least one object in the queue, it will be passed to the Traffic Monitor server |
| Connections to Traffic Monitor | The maximum number of concurrent connections to the Traffic Monitor server |
| Reconnection interval (sec) | Interval (in seconds) at which the Crawler server will try to restore connection with the Traffic Monitor server if the connection is lost |

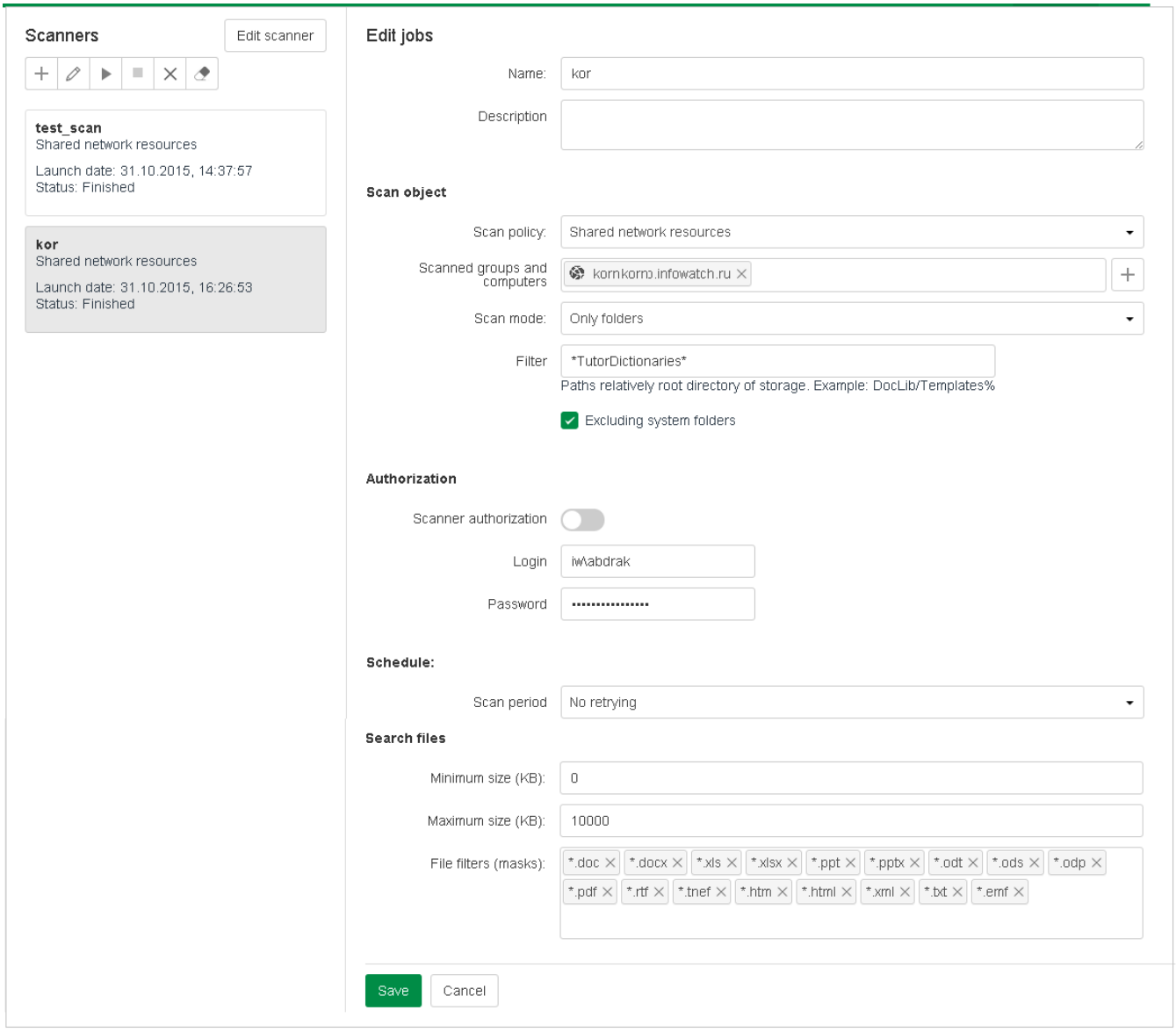
| Parameter | Description |
|---|---|
| Do not display the following SID | Allows you to configure a filter of persons |
| System folder masks | Folder masks, that will not be scanned |

**User's target actions:**

- Editing scanners installed in the System (see "Configuring Scanner")
- Creating the scanning job (see "Creating a Job")
- Starting and stopping the scanning job (see "Launching and Stopping the Job")
- Modifying the scanning job (see "Editing the Job")
- Cleaning the hash base of scanning jobs (see "Cleaning the Hash Base")
- Viewing the history of scanning jobs (see "Viewing Launch History")
- Saving the report of completing the scan job to the hard disk (see "Saving Scan Report")

## 4.9.2 Scanning Job

**Reference information:**
***Scanning job*** is a single or repeated operation of checking target storage locations (Microsoft SharePoint 2007/2010/2013 storage, local drives of workstations, shared network resources) if they store confidential data (for more details about the list of confidential data, see "Defining the confidential information"). Job attributes are displayed when you switch to edit mode.




Scanning job and its edit form

Job attributes:

| **Parameter** | **Description** |
|---|---|
| Name | Name of the job |
| Description | Optional note |

| | |
|---|---|
| Scan policy | Type of scan job:<br>• **Shared network resources**<br>• **Local drives of workstations**<br>When using the **Local drives of workstations** policy, the **Use simple file sharing** option must be disabled on workstations where Windows XP is installed (**Control Panel** -> **Folder Options**, **View** tab)<br>• **SharePoint file storage**<br>the following parameters are specified:<br>o **SharePoint version** - SharePoint version: 2007, 2010 or 2013;<br>o **Address of DB resource** field - enter address of the SharePoint database server;<br>o **Name of DB resource** field - enter the name of SharePoint database instance.<br><br>For example:<br>**Address of DB resource** - `sharepoint-test`<br>**Name of DB resource** - `wss_content` |
| Scanned groups and computers | Group of persons and workstations to be scanned |
| Scan mode | **All folders** - scans all folders on the workstation<br>**All folders except** - scans all folders on the workstation except the specified ones<br>**Only folders** - only scans folders specified by the user<br>**Note:**<br>If you want to scan all folders including system folders, clear the check box **Exclude system folders**. By default, system folders are not scanned.<br>**To specify scanning paths, you can use the following symbols:**<br>*- any characters (0 and more)<br>?- any single character<br>$- symbol that is used by Windows to indicate the hidden folder<br>**Warning!**<br>The scanning path should end with ***** or ****. For example, the path can look like: "C?\folder*" or "C?\folder\".<br>**When scanning the shared network resources or SharePoint storage you can use the following queries:**<br>`Docs*` - will scan the Docs folder and all its subfolders.<br>`text_example` - will search for “text_example” in the path.<br>`.file_format` - will scan files of specified format (.txt)<br>**When scanning local discs and folders, you can use the following queries:**<br>`C$\Docs*` - will scan the Docs folder and all its subfolders on C:\ drive<br>`*\Docs*` - will scan the Docs folder and its subfolders, regardless of their location.<br>`?$\Docs*` - will scan any folder whose name has 1 character and the Docs folder with all subfolders. (C$\Docs\, D$\Docs)<br>`\Docs????*` - will scan any folder that has Docs in its name with 4 additional characters (Docs1234)<br>**Warning!**<br>In the **All folders** scanning mode, only local drives of the workstation will be scanned. |

| | |
|---|---|
| Authorization | You can use scanner authentication (in this case, scanning will run under the user account under which the scanner is started) or specify the login and password of the user account manually. By default scanner authentication is used.<br>**Warning!**<br>When scanning the SharePoint storage, the user of the MS SQL Server that hosts the target database must be specified.<br>**Warning!**<br>Crawler uses access to domain controller to receive information about users or groups by unique identifier (SID). To provide access, use domain account with read rights for the resource to scan. |
| Scan period | Schedule of scanning<br>**Warning!**<br>If the **Monthly** period is selected, the scan job will start only when the current month contains the date specified in the **Day of month** parameter. For example, if the value of 30 is selected, then the scanning job will not run in February. |
| Minimum size (KB) | The minimum size of scanned files, in kilobytes |
| Maximum size (KB) | The maximum size of scanned files, in kilobytes |
| File formats | Extension of scanned files<br>**To add a new format:**<br>1. In the field with the list of formats, type the desired extension and then press **Enter**.<br>2. The entered value will be added to the list of formats.<br>3. To delete a value, click x next to the required format. |

**User's target actions:**

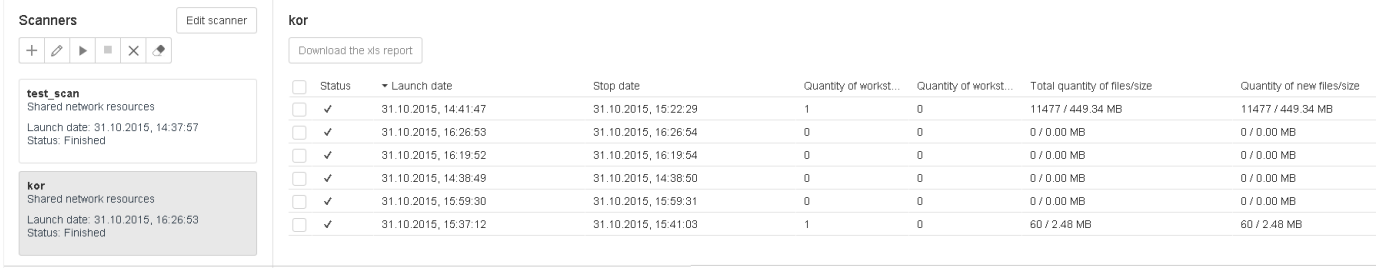
- Creating the scanning job (see "Creating a Job")
- Starting and stopping the scanning job (see "Launching and Stopping the Job")
- Modifying the scanning job (see "Editing the Job")
- Cleaning the hash base of scanning jobs (see "Cleaning the Hash Base")
- Viewing the history of scanning jobs (see "Viewing Launch History")
- Saving the report of completing the scan job to the hard disk (see "Saving Scan Report")

## 4.9.3 Launch History

**Reference information:**
The right part of the working area displays an information about launches of the selected scan job.

When you select a table entry, the detailed information about the selected launch is displayed on the tabs:

- **Launch events** - the tab contains system information about the launch of scanning job.
- **Launch parameters** - the tab contains the list of attributes of scanning job (see "Scanning Job")
- **Current status** - the tab contains information about the current status of a launched job (for jobs with a status other than **Launched**, the tab is not displayed).




Scanning job and its viewing form

Attributes of the history entry:

| Parameter | Description |
|---|---|
| Status | Identifier of the job status: ▶ - *Running*, ■ - *Stopped*, ✓ - *Completed*) |
| Launch date | The date and time the job run |
| Stop date | The date and time the job stopped |
| Quantity of workstations proceeded | Number of target workstations processed while the job was run |
| Quantity of workstations not proceeded | Number of target workstations which are not processed yet |
| Total quantity of files/size | Number and total size of files on target workstations processed while the job was run |
| Quantity of new files/size | The number and total size of files which were not processed previously on target workstations |

**User's target actions:**

- View information about the scan task execution phases (see "Viewing Launch History")

# 5 CASES SOLVING IN TRAFFIC MONITOR MANAGEMENT CONSOLE

Working in the Management Console, the Security Officer generally solves the following cases:

- Managing Persons and Workstations
- Managing Catalogs
- Working with the Base of Technologies
- Managing Protected Objects
- Managing Crawler Subsystem
- Managing Interception Objects
- Configuring System Response
- Managing Reports

Solving all cases, you have to perform typical actions which are described in "Typical Actions".

**Warning!**

Administrating the Management Console is beyond the authority of the Security Officer and is not described in this document. You can find the necessary information in the document "*InfoWatch Traffic Monitor Administration Guide*".

On the interface elements of the Management Console sections, see:

- Dashboards Section
- Events Section
- Reports Section
- Technologies Section
- Protected Objects Section
- Persons Section
- Policies Section
- Lists Section
- Crawler Section

# 5.1 Typical Actions

**Why the typical actions are needed?**
To perform the same-type operations in the Management Console.

**Typical actions include the following:**

| Action | Description |
|---|---|
| Log in and log out the Management Console | Is required to get authorized in the Microsoft Management Console to start working and then exit the Management Console |
| Applying System configuration | System configuration changes become active when updated configuration is applied |
| Editing the Element | You can edit entities required for configuring the System, displaying the interception objects and their processing |
| Deleting the Element | You can delete the entities used for configuring the System, displaying the interception objects and their processing |
| Pages Navigation | Numerous elements can be viewed in multi-page mode: navigation buttons are used to go to particular page with elements |
| Changing User's Password | To order of changing a password required to log into the System |
| Selecting Interface Language | Changing the interface language of the Management Console |
| Calling Help File | Access to the reference information |
| Viewing Information on System | Calling the general information on the System |

## 5.1.1 Login and Logout of the Management Console

**Purpose:**

1. Log into the Management Console.
2. Log out of the Management Console.

**Solution:**

1. **To log into the Management Console:**
    a. Open the Google Chrome browser version 30 or higher (if the browser is not installed, you can download it by clicking on the link).
    b. Go to the address given to you by the system administrator. The browser window will display the start page of the Management Console.
    c. In the **Login** field, specify the user name.
    d. In the **Password** field, specify the password.
    **Note:**
    Username and password can be obtained from the administrator of InfoWatch Traffic Monitor.
    e. Click **Login**.

2. **To log out of the Management Console:**
    a. Click the user menu button (see "Management Console Interface").
    b. Select **Logout**.

## 5.1.2 Applying System Configuration

**Reference information:**
The System configuration includes the following sections of the Console:

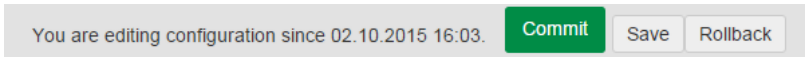
- Technologies
- Protected objects
- Persons
- Policies
- Lists

When you finish editing elements of these sections, you need to apply changes: after this, the changes take effect and the System starts working according to them.

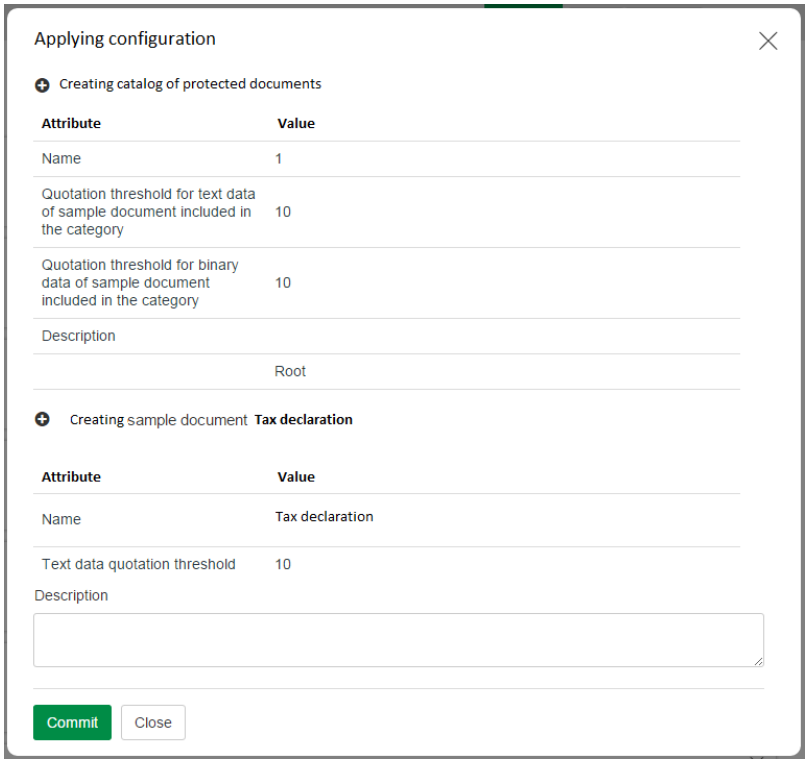
**Purpose:**
Apply the System configuration.

**Solution:**

1. When you finish editing the configuration, then, at the top of the browser window, click **Save** in the bar:




The **Configuration change** window will open. It contains information about the changes:



2. If necessary, enter text in the **Description** field.
3. Click **Save**.

## 5.1.3 Editing Element

**Purpose:**
Change attributes of an earlier created element.

**Solution:**

1. Go to the target section.
2. If necessary, go to the target subsection or tab.
3. Select the target element by clicking the left mouse button or select it from the drop-down list, and click **Edit**.
4. Enter required attributes (attributes of all elements are described in "Management Console Interface").
5. Click **Save**.

## 5.1.4 Deleting Element

**Purpose:**
Delete an element.

**Solution:**

1. Go to the target section.
2. If necessary, go to the target subsection or tab.
3. Select the target element by clicking the left mouse button or select it from the drop-down list.

> **Note:**
> To delete several elements, select them holding *Shift* or *CTRL*.

4. Click **Delete**.
5. In the confirmation window, click **Yes**.

## 5.1.5 Pages Navigation

**Reference information:**
Page navigation can be performed only in multi-page interface view mode.
Multi-page view mode is used for ergonomic work area usage. It is available when browser displays the page navigation pane:




Pages navigation panel

**Purpose:**
To go to the desired page in the multi-page mode.

**Solution:**

1. Go to the target section.
2. If needed, go to the target subsection or tab.
3. In the drop-down list located in right part of the page navigation pane, select a number of elements per page.
4. For page navigation, use buttons with page numbers. You can also use the following buttons:
    - **|<** - to go to the first page;
    - **<** - to go to the previous page;
    - **>** - to go to the next page;
    - **>|** - to go to the last page;

**Note:**

When using list sorting, navigation buttons act according to updated list.
For example, when sorting the list beginning with letter "A", the **>|** button will lead to he page with elements beginning with "Z". But if the sorting is backward, the **>|** button will lead to he page with elements beginning with "A".

## 5.1.6 Changing User Password

**Reference information:**
Users can change the password for the account under which they are authorized in the System.

**Purpose:**
To change the password.

**Solution:**

1. Click the user menu button and select **Change password**.
   The **Change password dialog box** will appear.
2. In this dialog box, type a new password for the account in the fields:
    - **Password**;
    - **Confirm password**.

**Note:**

Consult detailed guidelines for passwords described in the document "*Infowatch Traffic Monitor. Administration Guide*".

3. Click **Save**.

## 5.1.7 Selecting Interface Language

**Purpose:**
Change the interface language of the Management Console.

**Solution:**

1. ClickClick the user menu button (see "Interface of Traffic Monitor Management Console") and in the **Change language** block, choose a desired language.
2. In the **Change language** dialog window that opens, click **Yes**.

Do the same steps to revert English language if necessary.

## 5.1.8 Calling Help File

**Purpose:**
Get the reference information on how to work in the System.
**Solution:**

1. In the right upper corner of the workspace, click the user menu button (see "Management Console Interface").
2. In the drop-down list, under the **Help** caption, choose the desired type:
   - **Online** - to open the online version of documentation;
   - **Offline** - to open the offline version of documentation.

   In a new browser tab, InfoWatch Traffic Monitor help file in the selected format will open.
3. Read the information and then close the tab in the standard way.

## 5.1.9 Viewing Information on System

**Purpose:**
Get general information about the System.

**Solution:**

1. Click the user menu button (see "Interface of Traffic Monitor Management Console"), and choose **About**.
   The **About** window will be displayed on the screen, where you can view information about the System.

2. Read the information and then close the window in the standard way.

# 5.2 Managing Persons and Computers

**Why do you need persons and workstations:**

The presence of persons and computers make it easier for the security officer to work with intercepted objects. This is due to storing information about senders and recipients (persons), as well as computers in special catalogues.

**Warning!**

For the changes described in this section to be used in the System, you should apply the renewed System configuration (see details in "Configuring the System" and "Applying the System Configuration".

**Managing persons and computers includes following actions:**

| Action | Description |
|---|---|
| Creating a Group of Persons and Computers | Creating a group where you can add persons and computers |
| Creating a List of Persons and Computers | Adding persons and computers to the group |
| Viewing Summary on Person or Computer | Configuring widgets to display statistical data on persons or computers |
| Viewing Events for Person or Computer | Viewing interception objects for a target person or computer |
| Adding Status to Person or Computer | Adding a special marker to a person or computer to monitor their activities or to visually distinguish them |
| Adding a Person or Workstation to the Perimeter | Adding a person or computer to established lists of the company |
| Configuring Person's Card | Adding data to the person's entry |
| Configuring Workstation Card | Adding data to a computer entry |
| Viewing Screenshots | Viewing screenshots for a person/computer |

**See also:**

- "Persons Section" -about the section where you can manage lists of persons and computers

## 5.2.1 Creating a Group of Persons and Computers

**Purpose:**
Create a group of persons and computers.

**Solution:**

1. Go to the **Persons** section.
2. In the left part of the workspace, select **User Groups**.
3. On the toolbar in the left part of the workspace, click **Create group**.
4. Specify attributes of the new group (see “Group of Persons and Computers").
5. Click **Save**.

> **Warning!**
>
> If a new group is created, events for this group are displayed starting from the moment of applying the configuration.

You can add existing Active Directory groups to a user group. In this case, when you add or remove persons within an Active Directory group, contents of a corresponding user group will be updated automatically.

To add an Active Directory group to a user group, select a desired Active Directory group with a mouse and drag and drop it at the required user group.
Groups from different domains can be added to the same user group. You can also use drag-and-drop to add individual domain users to a user group.

> **Note**
>
> To enable automatic update for user groups which contain Active Directory groups, run synchronization with the LDAP server.

On filling created groups, see "Creating List of Persons and Computers".

**Additional information:**

Editing and deleting groups of persons and computers are performed by standard means:

- Editing Element
- Deleting Element

## 5.2.2 Creating List of Persons and Computers

**Reference information:**
You can fill lists of persons and computers in the following ways:

- from Active Directory of the company - this way is configured by the System administrator (see the document “*Infowatch Traffic Monitor. Administration Guide*“);

- by means of Traffic Monitor - the list is created by a security officer as described in this topic.

**Purpose:**
To fill a list of persons and computers.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. On the right part of the workspace, click on the tab:
    - **Persons** - to add a person;
    - **Computers** - to add a computer.
4. On the toolbar in the right part of the workspace, click  **Add**.
5. Specify parameters of a new user or computer (see “Persons" and "Computers").
6. Click **Save**.

**Additional information:**
You can edit or delete persons and computers by standard means:

- Editing Element
- Deleting Element

## 5.2.3 Viewing Events of a Person

**Purpose:**
To view events of a person or computer.

**Solution:**

1. Create a query and specify the target person in its parameters (for more details, see "Creating Queries").
2. Run the query you created.

You can view events for a computer in a similar way.

**Example:**
If you need to display all interception objects sent by Smith during the current week (assuming that the *Smith* person has already been created in **Persons** section):

1. Go to the **Events** section and create a query named *Smith* where
    - **Date of interception** attribute has the *Current week* value;
    - **Senders** attribute has the *Smith* value (selected from a list of previously created persons).
2. Save and apply the created query.

As a result, a list containing all found events will be displayed.

## 5.2.4 Viewing Summary on Person

**Purpose:**
To view a summary for a person or a  computer.

**Solution:**

1. Create a query and specify the target person in its parameters (see "Creating Queries").
2. Create a **Selection** widget and, in the **Summary** attribute, specify an earlier created query (see “Creating Widget")

In a similar way, you can view a summary on a computer.

**Example:**
If you need to display all interception objects sent by Smith during the current week (assuming that the *Smith* person is already created in the **Persons** section):

1. Go to the **Dashboard** section.
2. Create a widget named *Smith* where the **Summary** attribute has the value of an earlier created query *Smith* (see "Viewing Events for Person").
3. Save and apply the created widget.

The **Dashboard** section displays the *Smith* widget with all required events.

## 5.2.5 Adding Status to Persons

**Purpose:**
To add status to a person or computer.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. On the right part of the workspace, click on the tab:
   - **Persons** - to add status to a person;
   - **Computers** - to add status to a computer.
4. Select the target user or the target computer.
5. On the toolbar in the right part of the workspace, click and, in the drop-down list, select **Set status**.
6. In the dialog box that appears, specify the desired status and, if necessary, enter a description.
7. Click **Save**.

> **Note:**
>
> The *New* status is assigned to a person or computer when they are created in the System. This status is preserved for 30 days (in case persons and computers are imported from Active Directory, the *New* status is preserved for 30 days starting from the moment the records are created in Active Directory).

**See also:**

- "Statuses" - on the section where you can manage statuses of persons and computer

## 5.2.6 Adding a Person to Perimeter

**Purpose:**
Add a person or a group to an existing perimeter.

**Solution:**

1. Go to the **Lists**->**Perimeters** section.
2. By clicking the left mouse button select a target perimeter from the list (see "Perimeters").
3. In the right part of the workspace click **Add element to perimeter** and in the drop-down list select **Person**.
4. In the **Person** field that appears, specify the target person by doing one of the following:
   - start typing the name or surname and select the desired entry from the drop-down list;
   - click **Add**, and in the dialog box that opens, select the check box for the target person (you can select multiple persons), then click **Save**.
5. In the perimeter editing area, click **Save**.

In the same way, you can add a group of persons to the perimeter.

***Example:***

If you want the perimeter*Accounts* to include the group *Financial*:

chose the *Accounts* perimeter in the list of perimeters and then add the *Financial* group:

1. click **Add element to perimeter**;
2. in the drop-down list, select **Group of persons**;
3. in the **Group of persons** specify *Financial* and clicks **Save**.

**See also:**

- "Perimeters" - on the section where managing perimeters is performed

## 5.2.7 Configuring Person's Card

**Purpose:**

Fill the card of person with data.

**Configuring the person's card consists of the following actions:**

| Action | Description |
|---|---|
| Adding Contact to a Person | Add contact information for the created person |
| Adding Compuer to Person | Add a computer associated with the person |
| Adding Person to Group | Adding the person to an existing group |

### 5.2.7.1 Adding Contact to Person

**Purpose:**
Add or edit contact information for the person.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Persons** tab.
4. Double-click the target person. The person card will open.
5. On the **Information** tab, in the **Contacts** block, click .
6. In the **Add contact** form that opens, specify required parameters:
    - type of contact: e-mail, Lotus mail, mobile phone, landline phone, Skype, ICQ, web contact, domain account;
    - whether the contact is personal or working;
    - contact value (number or address);
    - optional description.
7. Click **Save**.

**Note:**

Contact values must be specified in the following format:

- - mobile phone (string of 3 or more characters; may contain only digits, space, and the characters: “-”,”_”, “( )”,”+”);
- - landline phone (string of 3 or more characters; may contain only digits, space, and the characters: “-”,”_”, “( )”,”+”);
- - e-mail (e-mail address in RFC format);
- - Skype contact (string of 1 or more characters);
-  - Skype contact (string of 1 or more characters);
- - WEB-identifier, for example, a profile on a social network (string of 1 or more characters);
-  - Lotus e-mail (string of 1 or more characters).

To edit previously specified contact details:

1. Select the desired contact using the left mouse button and, on the toolbar, click .
2. Edit parameters of the contact.
3. Click **Save**.

### 5.2.7.2 Adding Computer to Person

**Purpose:**
To add a computer that will be linked to a particular person.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Persons** tab.
4. Double-click the target person. The person card will open.
5. On the **Information** tab, in the **Computers** block, click .
6. In the **Add workstation** window that opens, select required computers.
7. Click **Save**.

### 5.2.7.3 Adding Person to Group

**Purpose:**
Add a person to an existing group.

**Solution:**

1. Go to the **Persons** section.
2. In the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Persons** tab.
4. Double-click the target person. The person card will open.
5. On the **Information** tab, in the **Groups** block, click .
6. In the **Add group** window that opens, select desired groups.
7. click **Save**.

If you need to remove a person from the current group:

1. On the **Persons** tab, select the desired person.
2. On the toolbar in the right part of the workspace, click  and in the drop-down list select **Remove from group**.
3. In the confirmation window, click **Yes**.

> **Warning!**
>
> If the person is included in this only group, then this command will delete the person.

## 5.2.8 Configuring Computer Card

**Purpose:**
Add data to a computer card.

**Configuring a computer card consists of the following actions:**

| Action | Description |
|---|---|
| Adding contact to computer | Adding an IP/DNS contact or a domain account to the computer |
| Adding person to computer | Adding a person associated with this computer |
| Adding computer to group | Adding computer to an existing group |

### 5.2.8.1 Adding Contact to Computer

**Purpose:**
Specify the IP address, DNS name, or domain account for the computer.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Computers** tab.
4. Double-click the target computer. The computer card will open.
5. On the **Information** tab, in the **Contacts** block, click +.
6. In the **Add contact** form that opens, specify required parameters:
    - contact type: **IP**, **DNS** or **Domain account**;
    - account value: IP address, DNS name, or a domain account name;
    - optional description.
7. Click **Save**.

### 5.2.8.2 Adding Person to Computer

**Purpose:**
Add a computer linked to a person.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Computers** tab.
4. Double-click the target computer. The computer card will open.
5. On the **Information** tab, in the **Persons** block, click +.
6. In the **Add person** window that opens, flag required persons.
7. Click **Save**.

To remove the added person, select the person in the list and click ×.

### 5.2.8.3 Adding Computer to Group

**Purpose:**
Add computer to an existing group.

**Solution:**

1. Go to the **Persons** section.
2. On the left part of the workspace, left-click the target group.
3. In the right part of the workspace, open the **Computers** tab.
4. Double-click the target computer. The computer card will open.
5. On the **Information** tab, in the **Groups** block, click +.
6. In the **Add group** window that opens, flag required groups.
7. Click **Save**.

If you need to remove a computer from the current group:

1. Select the required computer on the **Computers** tab.
2. On the toolbar in the right part of the workspace, click ▾ and in the drop-down list select **Remove from group**.
3. In the confirmation window, click **Yes**.

> **Warning!**
>
> If the computer belongs to this only group, then this command will result in deleting the computer.

## 5.2.9 Viewing Screenshots

**Preliminary settings:**

For screenshots to be displayed in cards of persons and computers, synchronization with Active Directory is required.

If you do not use Active Directory in your company, or, due to technical restrictions, synchronization is unavailable, then, to enable viewing screenshots, do the following:

1. Create cards of persons and computer, for which you want to retrieve screenshots (see "Creating List of Persons and Computers").
2. For persons, specify a domain account (see "Adding Contact to Person").

**Note:**

Specify the domain account in the following format: *name@client* where *name* is the user name and *client* is the name of the computer.

3. For computers, specify a NetBIOS or device name (see "Adding Contact to Computer").

**Note:**

In the case of synchronization with Domino Directory, it is also possible to specify a domain account for persons.

**Important!**

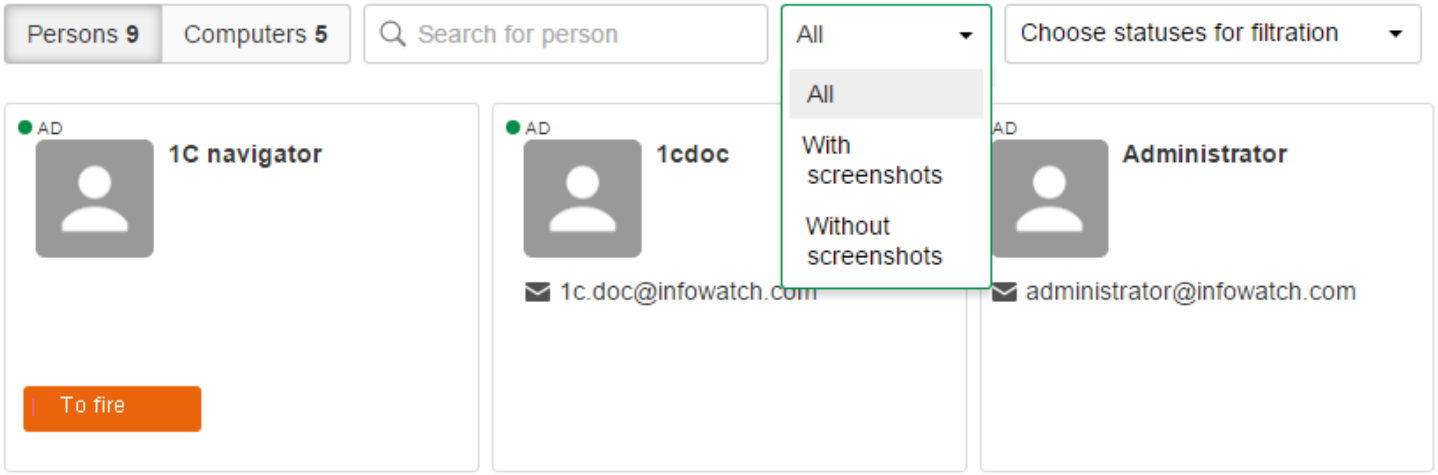
It is necessary to perform specified actions prior to creating a Device Monitor rule (see "Configuring ScreenShot Monitor Rule (DM)") and deploying the Device Monitor policy, which includes this rule, to workstations. Otherwise, the System will not display screenshots.

**Purpose:**

View intercepted screenshots for a person or a computer.

**Solution:**

1. Go to the **Persons** section.
2. In the left part of the workspace, left-click the desired group.
3. In the right part of the workspace, open the desired tab: **Persons** or **Computers**. The list of persons or computers included in the selected group will be displayed.
4. You can find the desired person or computer using the **Search for person** field (search by a person name or the computer IP address is available).
   In the case of a large number of persons/computers, you can filter elements by the presence of screenshots: left-click the filter area and, in the drop-down list, choose **With screenshots**.




As a result, persons or computers that meet the filtering criteria will be displayed.

5. To view screenshots for the selected person or computer, do either of the following:
   - select the person or computer in the list, then, on the toolbar, click and, from the drop-down list, select **Show screenshots**;
   - double-click the desired person or computer and, in the person or computer card that opens, switch to the **Screenshots** tab.

   The **Screenshots** tab contains all screenshots taken for this person or computer.
6. You can specify the following criteria for displaying screenshots:
   - **Application** - start typing the application name and choose the desired application from suggestions. Or click

     and, in the dialog box that opens, check the boxes of the selected applications, then click **Save**.

     **Note:**

     If you enter the application name manually, you can use * in the beginning or in the end of the line to replace any number of characters.
   - **Person/Computer** - when viewing screenshots for a person, you can filter them by the computer name. Similarly, when viewing screenshots for a computer, you can specify a person and view screenshots for this person.
   - **Date** - specify the period for which to display screenshots. By default, screenshots for all time are displayed.

**Note:**

When you select a period in the calendar, you can specify the date and the time. Dates, for which screenshots are available, are highlighted in blue.

7. When you specify all required criteria, click **Apply**. The System will display screenshots that meet the specified criteria.
8. To view detailed information on a screenshot, click the desired screenshot. The System will display the screenshot and its attributes.
9. You can increase or decrease the image scale, go to the previous or the next image (for details, see "Screenshots").
10. To close the viewer, click **X**.

# 5.3 Managing Catalogs

**Warning!**

If you want changes described in this section to be used in the System, apply the configuration: see "Configuring the System" and "Applying System Configuration".

**What for do you need catalogs?**
To add, edit, or delete catalogs used in the System.

**Managing catalogs includes the following actions:**

| Action | Description |
|---|---|
| Managing Tags | Editing the list of tags |
| Managing Resources Lists | Editing the list of resources |
| Managing Statuses | Creating the list of statuses |
| Managing perimeters | Editing the list of perimeters |

**See also:**

- "Lists Section" - on the section where managing catalogs is performed

## 5.3.1 Managing Tags

**Purpose:**
To create a tag.

**Solution:**

1. Go to the **Lists** section, subsection **Tags**.
2. On the toolbar click + **Create tag**.




3. Specify attributes of the added tag (see "Tags").
4. Click **Save**.
5. If necessary, repeat the adding procedure to fill the catalog of tags.

**Additional information:**
Editing and deleting tags are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.3.2 Managing Web Resources

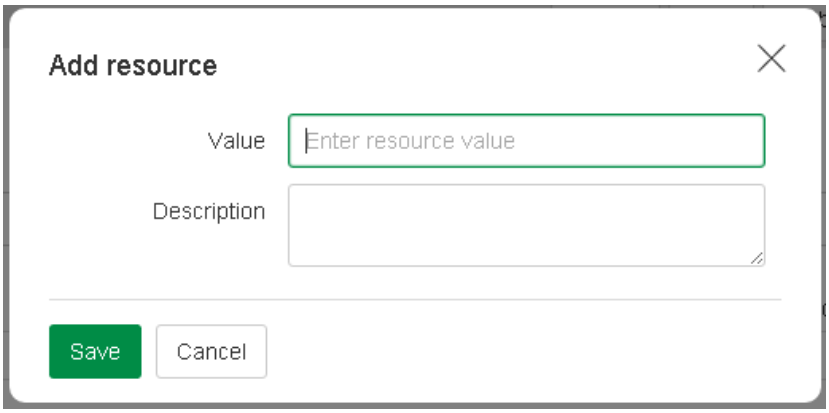
**Purpose:**
Specify web resources, which the System treats as inappropriate use of working time. To do this:

1. Create a list of web resources
2. Add resources to the list

**Solution:**

1. Creating a group of resources
    a. Go to the **Lists** section, the **Resources** subsection.
    b. In the left part of the workspace, click + **Create resource list.**
    c. In the window that opens, type a name and description of the resource list.
    d. Click **Save**.
2. Adding a resource
    a. Go to the **Lists** section, **Resources** subsection.
    b. In the left part of the workspace, left-click the target resource list.

c. On the toolbar in the right part of the workspace, click + **Create resource**.




d. In the **Add resource** window that opens, enter the resource attributes:
   - in the **Value** field - the resource name on the Internet;
   - in the **Description** field - a comment on the resource (optional).

e. Click **Save**.

**Warning!**

When you have finished editing the resource list, you need to apply the updated configuration (see "Applying System Configuration").

***Example:***

If you want to System to mark the interception object as *IMPROPER_SITES* when employees visit the EXAMPLE.COM site:
create the *IMPROPER_SITES* resource group and, in the group, add *EXAMPLE.COM* resource.

**Additional information:**

- Web resources and their groups can be edited and deleted by standard means:
  - Editing Element
  - Deleting Element

## 5.3.3 Managing Statuses

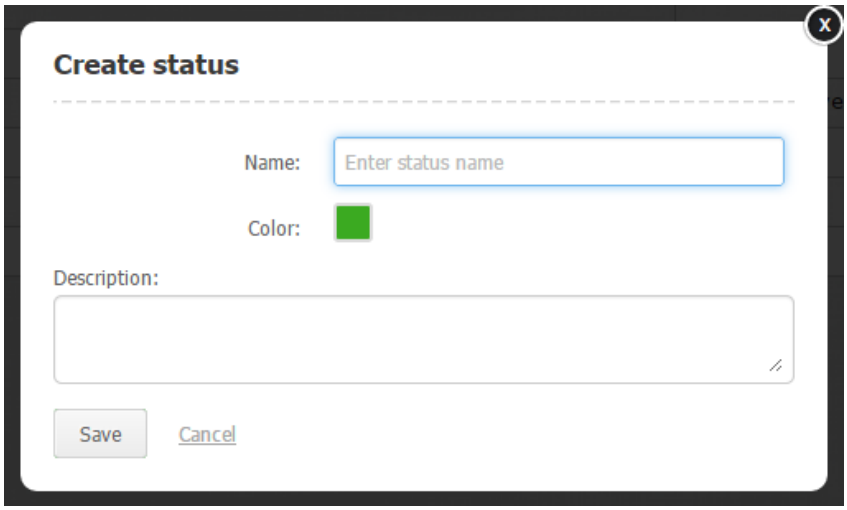
**Purposes:**:

1. Create a status that characterizes a person or a computer.
2. Create a person control policy for persons and computer with a specific status.

**To create a new status:**

1. Go to the **Lists** section, **Statuses** subsection.

2. On the toolbar, click  **Create status**:




3. Specify attributes of the new status (see "Statuses").
4. Click **Save**.

**To create a person control policy directly from Statuses subsection**:

1. Go to the **Lists** section, **Statuses** subsection.
2. In the list of statuses, select the desired status.
3. On the toolbar, click  **Create policy**.
   The **Policies** section will open. It displays the new person control policy for persons and computers with the selected status (for detail, see "Policies and their viewing form").

**Additional information:**

Statuses can be edited and deleted by standard means:

- Editing Element
- Deleting Element

## 5.3.4 Managing perimeters

**Reference information:**

Perimeters allow you to logically divide your organization into structural elements and track the traffic of each element.

By default, the System includes the following perimeters:

- *Company* - to control sending data out of the company
- *Exclude from interception* - to be used in the preset policy *Excluding from Interception* (see "Policy that Excludes Mailing Lists from Interception").

Preset perimeters do not contain elements, you should add elements manually (see *Purpose 2* in this article).

Besides preset perimeters, you can also create perimeters manually using the following elements:

- Email address
- Web resource
- Phone
- Skype contact
- ICQ contact
- Domain
- Lotus contact
- Person
- Person group

**Note:**

To choose LDAP domain, you should first configure synchronization with LDAP server and add the domain via the **Groups** tab.

**Purpose:**

1. Create a perimeter.
2. Add an element to a perimeter.

**Solution:**

1. Creating a perimeter.
    a. Go to the **Lists** section, **Perimeters** subsection.
    b. In the left part of the workspace, click + **Create perimeter**.
    c. In the dialog window that opens, in the **Name** field, specify the name of the perimeter.
    d. In the **Description** field, enter a description (optional).
    e. Click **Save**.
2. To add an element to the perimeter.
    a. Go to the **Lists** section, **Perimeters** subsection.
    b. In the left part of the workspace, left-click the target perimeter in the list of perimeters.
    c. In the right part of the workspace, click **Add element to perimeter** and, in the drop-down list, select the desired element type.
    d. In the field that appears, specify one or more elements doing one of the following:
        - For *Persons*, *Group of persons* or *Resource type*:
            - start typing the name of the item in the field and select the desired entry from the drop-down list;
            - click + **Add** to the right of the field and, in the dialog window that opens, select desired elements. Then click **Save**.

- For *E-mail address*, *Web-resource*, *Phone*, *Skype*, *ICQ*, *Domain,* and *Lotus contact* - enter the name (for example, of a web resource) or value (for example, of an IP address) in the field and click **Enter** on the keyboard.

> **Warning!**
>
> To include the domain in the perimeter, you should use its full name. If you specify a domain name of the first level, domains of nested levels will not be included in the perimeter. For example, when you add the `domain.com` domain in the perimeter, the `basic.domain.com` domain of the nested level will not be considered.

e. Entered values will be added to the list of elements. To remove a single element from the list, click ✕ next to the element name. To delete the entire list of elements of a particular type, click the ✕ button next to the line with a list of elements.




***Example:***

1. If you want to create an *Accounts* perimeter:
   Add a new perimeter and name it *Accounts*.
2. If you want the perimeter *Accounts t*o include the *Financial* group (including all contact details for persons who belong to the specified group) and the employee John Smith (assumes that *John Smith* person has already been created in the **Persons** section) who is not included in the *Financial* group:
   Chose the *Accounts* perimeter in the list of perimeters Then:
   a. add the *Financial* group:
      i. click **Add element to perimeter**
      ii. in the drop-down list, select **Group of persons**
      iii. in the **Group of persons** field, specify *Financial*
   b. add the *John Smith* person:
      i. click **Add element to perimeter**
      ii. in the drop-down list, select **Person**
      iii. in the **Person** field, specify *John Smith*

**Additional information:**

Perimeters can be edited and deleted by standard means:

- Editing Element
- Deleting Element

# 5.4 Managing Base of Technologies

**Warning!**

If you want changes described in this section to be used in the System, apply the configuration: see "Configuring the System" and "Applying System Configuration".

**What do you need the base of technologies for?**
Using elements of the technologies base, you can denote to the System which information is confidential within the company (disclosure of this information is a violation of the corporate security policy). The base of technologies is used for analyzing actions of persons, as a result of which violations of the corporate security policy can be identified (for example, sending a confidential document outside the company perimeter). The *base of technologies* is a set of elements (terms, text objects, sample documents, etc.), used for analysis of intercepted data.

In addition to the base of technologies, person's actions can also be analyzed by means of the resource list. This list allows identifying improper use of working time (for example, visiting entertaining Internet sites from working computer). For more information on specifying inappropriate resources, see "Managing Resources Lists".

**Configuring analysis of the person's actions includes the following:**

1. Defining the confidential information - creating the base of technologies.
2. Specifying inappropriate resources - creating a list of resources visiting which from a workplace is considered inappropriate use of working time.
3. Creating protected objects based on the elements of the base of technologies.

Then you can create a policy and denote to the System how to respond if protected objects are detected in intercepted data, or if requests are sent to inappropriate resources (see "Configuring System Response").

**See also:**

- "Technologies Section" - on the section where managing the base of technologies is performed
- "List of Resources" - on the subsection where managing the list of resources is performed
- "Protected Objects Section" - on the section where managing protected objects is performed

## 5.4.1 Defining the Confidential Information

**Purpose:**

Add elements to the base of technologies that will be used by the System to detect confidential data in interception objects.

**Solution:**

1. Go to a subsection of the **Technologies** section (**Categories and terms**, **Text objects**, **Sample Documents**, **Blanks**, **Stamps** or **Database Unloadings**).

**Note:**

The Graphical Objects subsection contains only preset elements. Adding, editing or deleting these elements is unavailable.

2. Create a new category in the **Categories and terms** subsection or a new catalog in other subsections.
3. Fill the created category (or created catalog) with examples of confidential data that will indicate violations of the security policy if found in traffic.
4. If necessary, repeat steps 2 and 3.

**Warning!**

When you have finished configuring the base of technology, you need to apply the updated configuration (see "Applying System Configuration").

For more information about adding elements for each technology, see the following articles:

| Technology name | Technology description | Action |
|---|---|---|
| Categories and terms | A set of terms and their categories.<br>The term is a word or phrase which (if found in the analyzed text) increases the degree of conformity of the text to the category of the found term. | Creating terms and their categories |
| Text objects | Text information extracted from the object body and its attachments.<br>Contains no formatting or markup.<br>Applies and solving analysis tasks and search. | Creating text objects |
| Sample documents | Document quotes from which are searched in the analyzed text.<br>Memos, financial reports, contracts, and other sensitive documents can all be used as sample documents.<br>Sample documents are stored in the system as digital prints, their text is not available to either users or System administrators | Creating Sample Documents |
| Blanks | Blank whose version is searched for in the network traffic.<br>Blanks may be different questionnaires, receipts, etc.<br>Blanks are stored in the System as digital fingerprints, their text is not available for viewing either by users or by the System administrators. | Creating Forms |
| Stamps | Stamp image that is searched in the network traffic.<br>Stamps can be images of round impressions used in organizations. | Creating Stamps |
| Database unloadings | A part of a database quotes from which are searched in the analyzed text.<br>Database unloadings can be lists of salaries, other personal data, etc. | Creating Database Unloadings |

| Technology name | Technology description | Action |
|---|---|---|
| Graphical objects | Image of particular type that is searched in the network traffic. Graphical objects can be images of credit cards or technical drawings. | The System contains only preset graphical objects. Creating or editing graphical objects is unavailable. |

**See also:**

- "Technologies Section" - on the section where managing the base of technologies is performed

### 5.4.1.1 Managing Categories and Terms

**Reference information:**
*Terms* are a set of data required to perform the linguistic analysis of text. Terms are grouped into *categories*.
Categories allow classifying possible violations of security policy. If a text contains a term from a certain category, the text is matched with this category.

**Purposes:**

1. Create a category of terms.
2. Create a term within a category.

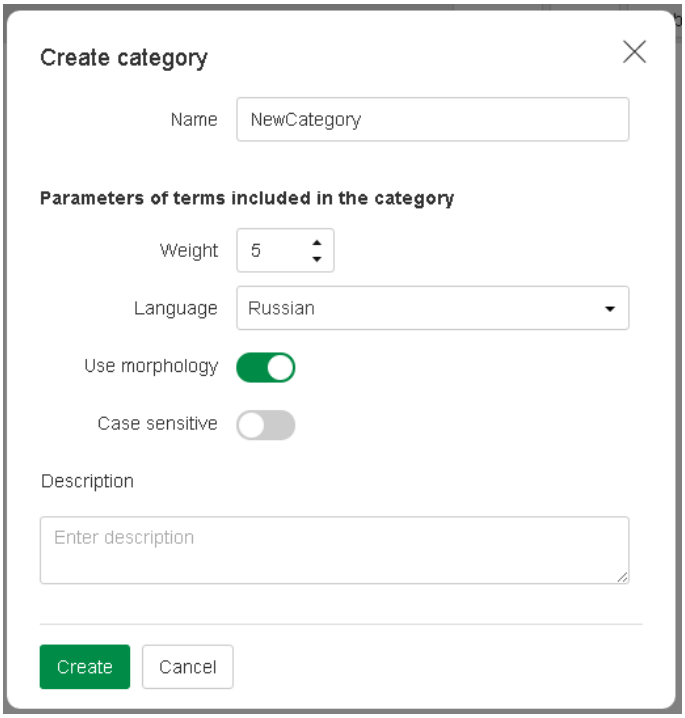
**Solution:**

**1. To create a category.**

1.

a. Go to the **Technologies**->**Categories and terms** section.

b. On the toolbar on the left side of the workspace, click + **Create category**.



c. Specify required attributes for the category (see “Categories").

d. Click **Create**.

**2. Creating a term.**

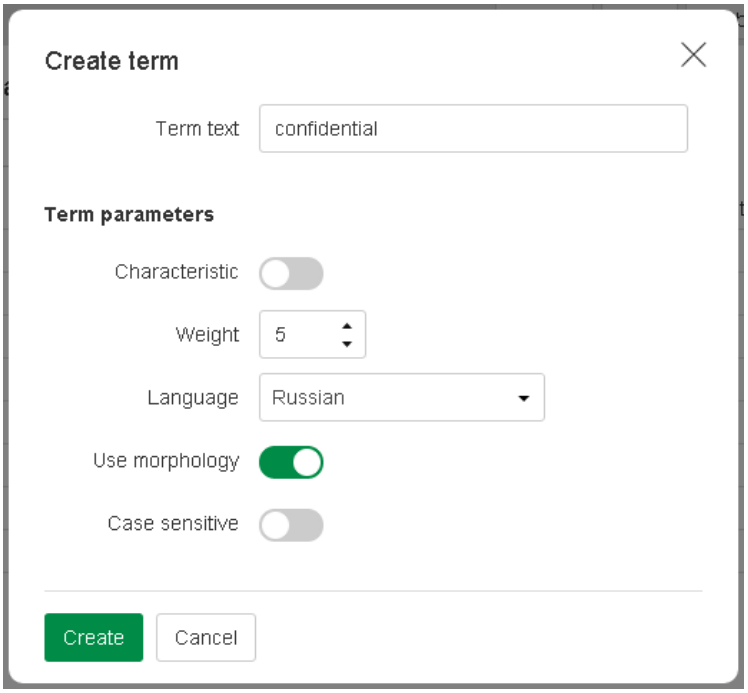
1.

a. Go to the **Technologies**->**Categories and terms** section.

b. On the left part of the workspace left-click the target category.

> **Note:**
>
> For terms adding only those categories that do not include other nested categories are available.

c. On the toolbar on the right part of the workspace, click + **Create term**.




d. Specify required attributes (see “Terms").

e. Click **Save**.

***Example 1:***
If you need that the System would mark the interception object as DOCUMENT_ISSUE_DATE if it contains, at least, one occurrence of the phrase "document issue date”:

1. Select a target category
2. Add the term *Document issue date* to this category
3. Enables the **Characteristic** attribute.

If intercepted data contains this phrase, the System assigns the *Document issue date* category to the object.

***Example 2:***
If you need that in case traffic contains fragments of program code, the System would mark the intercepted object as code leakage:
The security officer creates a *Code leakage* category, and adds the terms: *Procedure* and *Result*. If during analysis of transmitted data, those terms are found, the System assigns the *Leaked code* category to the intercepted object.

**Warning!**

The interception object receives only the category that contains the actuated element (term, sample document, etc.).
***For example:***
Category A contains category B. Category B includes the term C. During the event analysis, the System detected the presence of the term C in the event body.
In this case, only the term C and category B will be assigned to the interception object.

**Additional information:**

Editing and deleting terms are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.4.1.2 Managing Text Objects

**Purposes:**

1. Create a catalog of text objects.
2. Create a text object and specify its value.
3. Add a system text object to the selected catalog.

**Solution:**

### 5.4.1.2.1 1. Create a catalog of text objects.

1.

a. Go to the section **Technologies** -> **Text objects**.

b. On the toolbar on the left side of the workspace, click  **Create a catalog of text objects**.

c. In the window that opens, type a name and description for the catalog.

d. Click **Save**.

### 5.4.1.2.2 2. Create a text object and specify its value.

1.

a. Go to the section **Technologies** -> **Text objects**.

b. On the left part of the workspace by clicking the left mouse button, select the catalog inside which you want to create a text object.

c. On the toolbar for working with text objects located on the right side of the workspace, click + **Create a text object**.

d. Enter the name and description of the text object.

e. Click **Create**. The new text object will be added to the list.

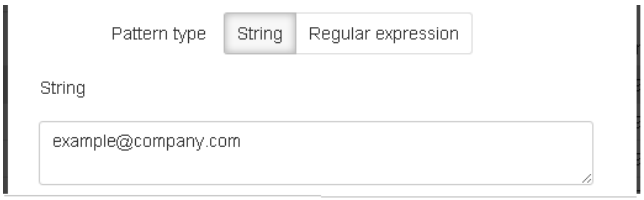
f. Select the text object in the list and click **Edit**.

g. Create a template for the text object and specify its parameters (see "Text objects patterns").

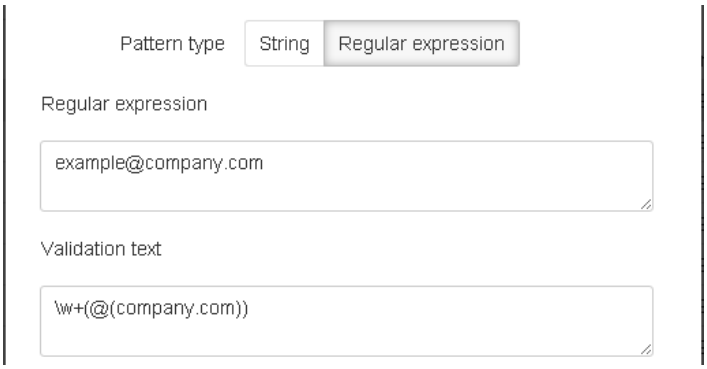
h. Click **Save**.

***Example:***

1) If you want the System to determine the presence of the email address "example@company.com" in traffic and define it as a text object EXAMPLE_MAIL:
the security officer creates an active text object *EXAMPLE_MAIL*. The Security Officer then selects the created text object with a mouse, switches to the object edit mode, creates a new active template for the text object, and specifies the following string as template value:`example@company.com`:




2) If you want the System to determine the presence of email address with the domain “company.com” in traffic and define it as a text object *COMPANY_MAIL*:
the security officer creates an active text object *COMPANY_MAIL.* The Security Officer then selects the created text object by clicking the left mouse button, switches to the object edit mode, creates a new active template, and specifies the following regular expression as its value:`w+(@(company.com))`




**Note:**

The System uses a standard regular expression language. Detailed information about regular expressions you can find, for example, in an online article "Regular Expression Language".

**3 Add a system text object to the catalog.**

1.

a. Go to the section **Technologies** -> **Text objects**. On the left part of the workspace left-click the target category.

b. On the left part of the workspace by clicking the left mouse button, select the catalog to which you want to add a text object..

c. On the toolbar for working with text objects located on the right side of the workspace, click and in the drop-down list select **Add system text object**.

d. In the window that opens, select check boxes next to the text objects you want to add.

> **Note:**
>
> To find required text objects in the list, enter the text in the **Search** string.

e. Click **Add**.

> **Note:**
>
> System text objects already contain pre-installed templates. However, you can also add a custom template to a selected system object. To do this, do the steps **f**-**h** from item **2. Create a text object and specify its value**.

**Additional information:**
Editing and deleting text objects and their values and catalogs are performed by standard means:

- Editing Element;
- Deleting Element.

### 5.4.1.3 Managing Sample Documents

**Purposes:**

1. Create a catalog of sample documents
2. Create a sample document inside catalog.
3. Update a sample document.

**Solution:**

**1. Createa catalog of sample documents**

1.

a. Go to the section **Technologies**->**Sample Documents**.

b. On the toolbar in the left part of the workspace click **Create catalog of sample documents**.

c. In the window that opens, specify parameters for the new catalog (see "Sample Documents").

d. Click **Create**.

**2. To create a sample document**

1.

a. Go to the section **Technologies**->**Sample Documents**.

b. On the left part of the workspace by clicking the left mouse button, select the catalog inside which you want to create a sample document.

c. On the toolbar for working with sample documents located on the right side of the workspace, click **Add**.

d. In the dialog window that opens, select type of the data a sample document may contain: **Text** or **All types** (may contain text, images, and binary data).

e. Click **Choose files** and in the window that opens, specify the document which you want to use for creating a digital print. Click **Open**.
Choose a text file, an image or an archive to be uploaded according to the data type specified at step **d**. The following rules apply when uploading files:

- If the format of the selected file is not supported by the System, the digital fingerprint will be uploaded as binary data.
- If you upload an archive, then files from this archive will be added as sample documents.

f. When the uploading is finished, the sample document will be added to the catalog. All necessary attributes are assigned to a newly created sample document by default.

> **Note:**
>
> If the System cannot load the file sample document, the download window will display an error message.

g. To change the sample document attributes specified by the System, on the toolbar click **Edit** and change the required parameters (see “Sample Documents").

**3 Update a sample document**

1.

a. Go to the section **Technologies**->**Sample Documents**.

b. On the left side of the workspace, select a desired catalog.

c. In the list in right part of the workspace, select the sample document you want to update.

d. Click **Edit**.

e. In the edit window that opens, click **Update**.

f. Click **Choose file**.

g. In the dialog window that opens, select a document that will be used for update, and click **Open**.

h. The file download will begin.After the download is finished, the sample document will be supplemented with new data in accordance with the selected update mode. If the System cannot perform an update, the download window will display an error message.

> **Note:**
>
> When updating a sample document, the System replaces data of the document being updated with the data from the update file.

**Example:**
If you need the System to mark the interception object as INTERNAL_COMPANY_RULES when traffic contains at least 30% of text from the document "*Internal regulations of the company*":

1.

a. The security officer goes to the required catalog,
b. loads the document file "internal rules of the company" as a sample document,
c. for the **Name** attribute, specifies the value *INTERNAL_COMPANY_RULES*
d. for the **Text data quotation threshold** attribute, specifies the value **30**.

If you need that the System marks the interception object as SETUP_EXE when the traffic contains at least 10% of the binary content of the "`Setup.exe`" executable file:

1.

a. The security officer goes to the required category,
b. loads the file "`Setup.exe`" as a sample document,
c. for the **Name** attribute, specifies the value *SETUP_EXE,*
d. for the **Binary data quotation threshold** attribute, specifies the value **10**.

**Additional information:**
Editing and deleting the sample documents and their catalogs are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.4.1.4 Managing Blanks

**Purpose:**

1. Create a catalog of blanks.
2. Create a blank.
3. Update a blank.

**Solution:**

**1. Create a catalog of blanks**

1.

a. Go to the **Technologies**->**Blanks** section.
b. On the toolbar on the left part of the workspace, click  **Create a catalog of forms.**
c. In the window that opens, type a name and description of the catalog.
d. Click **Create**.

**2. Create a blank**

1.

a. Go to the **Technologies**->**Blanks** section.

b. On the left part of the workspace by clicking the left mouse button, select a catalog inside which you want to create a blank.

c. On the toolbar for managing blanks which is located on the right part of the workspace, click  **Add**.

d. In the dialog window that opens, select a document that will be used as a blank and click **Open**. You can upload a document in one of the following formats: DOC, DOCX, DOT, DOTM, DOTX, XLS, XLSX, XLT, XLTM, XLTX, ODS, ODT, RTF, TXT, VSD, HTML, HTM, PDF, CHM.

e. When the download is finished, the blank will be added to the catalog. All necessary attributes are assigned to a newly created blank by default.

> **Note:**
>
> If the System cannot load the file of the blank, the download window will display an error message.

f. To change attributes of the blank specified by the System, click  **Edit** on the toolbar and change required attributes (see “Blanks").

**3 Update a blank**

1.

a. Go to the **Technologies**->**Blanks** section.

b. On the left side of the workspace, select a desired catalog.

c. In the list on the right part of the workspace, select the blank you want to update.

d. Click



**Edit**.

e. In the edit window that opens, click **Update**.

f. Click **Choose file**.

g. In the dialog window that opens, select a file that will be used for update, and click **Open**. The file download will begin.

h. Data of the blank will be replaced with data from the update file.
If the System cannot perform an update, the download window will display an error message.

**Example:**

If you need the System to mark the interception object as RECRUITMENT_CHECKLIST if the traffic contains fragments of the questionnaire "Recruitment checklist" (filled or not):

1. the Security Officer creates a *RECRUITMENT_CHECKLIST* blank,
2. loads the document file “Recruitment checklist” as a blank,

3. creates a protected object based on the *RECRUITMENT_CHECKLIST* blank,
4. in detection conditions, selects **Filled and unfilled** checkbox.

**Additional information:**
Editing and deleting forms and their catalogs are performed by standard means:

- Editing Element;
- Deleting Element.

### 5.4.1.5 Managing Stamps

**Purposes:**

1. Create a catalog of stamps.
2. Create a stamp.

**Solution:**

**1. Create a catalog of stamps.**

1.
    a. Go to the section **Technologies**->**Stamps**.
    b. On the toolbar on the left side of the workspace, click
    
    **Create a catalog of stamps.**
    c. In the window that opens, specify parameters for the new catalog.
    d. Click **Create**.

**2. Create a stamp**

1.
    a. Go to the section **Technologies**->**Stamps**.
    b. On the left part of the workspace by clicking the left mouse button, select the catalog inside which you want to create a stamp.
    c. On the toolbar in the right part of the workspace, click  **Add**.

> **Warning!**
> The uploaded file must contain only one stamp image.

    d. In the dialog window that opens, select a document that will be used as a stamp and click **Open**.
    e. When the download is finished, the stamp will be added to the catalog. All necessary attributes are assigned to a newly created stamp by default.

> **Note:**
>
> If the System cannot load the file of the stamp, the download window will display an error message.

f. To change the stamp attributes specified by the System, on the toolbar click **Edit** and change the required attributes (see "Stamps").

> **Note:**
>
> For more details on creating stamps, see the Knowledge Base article "How to use a detector of stamps".

***Example:***
If you need the System to mark the interception object as ROUND_SEAL if it contains an image of stamp used in the organization:

1.

a. the Security Officer prepares the file "`Stamp.png`" where the full-size square image of the stamp is placed against a white background,

b. goes to the required catalog,

c. loads the image file "Stamp.png" as a stamp,

d. creates a protected object *ROUND_SEAL* based on the created stamp.

**Additional information:**
Editing and deleting stamps and their catalogs are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.4.1.6 Managing DB Unloadings

**Purpose:**

1. Create a catalogue of unloadings.
2. Create a database unloading.
3. Update a unloading.

**Solution:**

**1. Create a catalogue of unloadings**

1.

a. Go to the **Technologies**->**DB Unloadings** section.

b. On the toolbar on the left side of the workspace, click **Create catalog of DB unloadings**.

c. In the window that opens, type a name and description for the catalog.

d. Click **Create**.

**2. Create a database unloading**

1.

a. Go to the **Technologies**->**DB Unloadings** section.

b. In the left side of the workspace, select the group to which you want to add the unloading.

c. On the toolbar in the right part of the workspace, click  **Add**.

d. In the dialog window that opens, select a file in CSV or TSV format that you want to upload and click **Open**.

> **Warning!**
>
> When running Postgre SQL unloading size can be no bigger, than 1GB.

e. When the file is uploaded:

- click **Configure DB unloading** - to customize the unloading, or
- close the **Creating DB unloading** window - to exit without additional configuration.

f. Specify required attributes (see “DB Unloadings" and "Detection Conditions for Unloading").

g. Click **Save**.

**3 Update a unloading**

1. Go to the **Technologies**->**DB Unloadings** section.
2. On the left side of the workspace, select the desired catalog.
3. In the list in the right part of the workspace, select the unloading you want to update.
4. Click  **Edit**.
5. In the edit window that opens, click **Update**.
6. Specify the desired update mode: **Adding new records** or **Removing old records and adding new ones**.
7. Click **Choose file**.
8. In the dialog window that opens, select a file that will be used for update, and click **Open**. The file download will begin.
9. After the download is finished, the unloading will be supplemented with new data in accordance with the selected update mode. If the System cannot perform an update, the download window will display an error message.

**Additional information:**
Editing and deleting unloadings and their catalogs are performed by standard means:

-

- Editing Element;
- Deleting Element.

### 5.4.1.6.1 Detection Conditions for Unloading

**Reference information:**

Satisfying the detection conditions allows the System to associate the interception object with a particular unloading.

You can specify several (up to 20) detection conditions for a unloading. In this case, one satisfied condition is sufficient to associate the interception object with this unloading.

**Purpose:**

Add a detection condition for an unloading.

**Solution:**

1. Go to the **Technologies**->**Database Unloadings** section.
2. In the left part of the working area, select the desired catalogue.
3. In the right part of the working area, select a desired unloading from the list and click

   **Edit**.
   The unloading edit form will open.
4. On the toolbar under the **Conditions of unloading detection** caption, click

   **Add**.
5. In the dialog window that opens, specify the following parameters (you can find a detailed description of these parameters below):
   a. **Condition name**;
   b. **Minimal quantity of rows**;
   c. **Detection rule**.
6. Click **Create**.

When editing detection condition parameters, consider the following recommendations:

***Detection rule.***

The detection rule contains column numbers and logical relations between them. If the analyzed interception object contains data from specified cells, given the set relations, then this row is considered triggered.

**Note:**

To avoid false positives, the System uses stop-words: numbers, letters and words, whose presence in cells results in not triggering these cells. You can find the whole list of stop-words in the InfoWatch Knowledge Base article " List of stop-words for database unloadings ".

The **Available columns in selection** list contains columns that can be used for creating conditions. The **Search** field allows you to find a required column by its name.

Logical relations are defined using the following symbols:

1. "+" - conjunction of cells (logical "AND");
2. "|" - disjunction of cells (logical "OR");

> **Note:**
>
> A condition like (1|3) should be in parentheses.

3. "()" - a grouping of conditions. For example, a condition like 1+(2|3) means that the row is considered to be triggered if its first cell and either its second or its third cell are triggered.

   A condition like (1|3)+(5|4) means that the row is considered to be triggered if both the first or the third cells and the fifth or the fourth cells are triggered.

> **Warning!**
>
> The "|" cannot be used to divide groups in parentheses. Thus, a condition like (1+8+11*)|(2+3*) should be specified as two separate conditions: 1+8+11* and 2+3*.

4. "*" - the asterisk symbol allows you to consider blank cells as well. For example, a condition like 1+2* means that the row is considered to be triggered if its first and second cells are triggered, wherein the second cell may be unfilled.

> **Warning!**
>
> The analysis technology does not consider special characters, so if the column contains an email address, then it is recommended that you should specify an additional column (e.g., Full name) in order to reduce false positives.

***Minimal quantity of rows.***

The minimal number of rows that must be detected to trigger the condition.

For example, if a condition like 1+(2|3) is specified and the minimal quantity of rows is set to 10, then for triggering the rule it is required that the analyzed text should contain at least 10 different rows that satisfy the condition 1+(2|3).

***Example:***

If you need the System to mark the interception object as PHONE_NUMBERS when detecting 7 or more rows with filled columns 1 and 4 from the table with the following structure:

| Last name | Name | Phone number |
|---|---|---|
| Smith | John | 89441234347 |
| Johns | Tom | 83531355424 |

| Last name | Name | Phone number |
|---|---|---|
| Williams | William | 83544593406 |
| White | Jane | 83245446441 |
| Black | Jillian | 84534359243 |
| Davis | Michael | 83544352925 |

1. save the table in CSV or TSV format and upload this file to the System;
2. configure the detection rule:
    - in the **Detection rule** field, specify **1+4**
    - in the **Minimal quantity of rows** field, specify **7**
3. create a protected object "PHONE_NUMBERS" based on the created DB unloading.

When detecting specified data columns in the transferred traffic, the protected object *PHONE_NUMBERS* is triggered in the System.

**Additional information:**
Editing and deleting detection conditions for the unloading are performed in a standard way:

- Editing Element
- Deleting Element

## 5.4.2 Exporting and Importing the Base of Technologies

**Purpose:**

- Save the XML document containing the base of technologies to a hard drive of the computer;
- Load the base of technologies, which is stored on your computer as XML document, for using in the Management Console.

> **Note:**
>
> While editing the System configuration, export and import of technologies are unavailable. In this case, an error message is displayed.

**To export the technologies base:**

1. Go to a subsection of the **Technologies** section (**Categories and terms**, **Text objects**, **Sample Documents**, **Blanks**, **Stamps** or **Database Unloadings**).
2. On the toolbar on the left part of the workspace, click ▾ and, in the drop-down list, select **Export**.
3. In the **Save as** window that opens, specify the location on disk where to save an XML file.
4. Click **Save**. The XML file will be saved to your computer. This file contains the following elements:
    - categories and terms;

- text objects, including pre-installed ones;
- sample documents;
- blanks;
- stamps;
- database unloadings;
- graphical objects.

The structure of catalogs is preserved for all elements.

**Warning!**

The base of technologies from the last applied configuration is exported (see “Configuring the System").

**To import the base of technologies which is stored on your computer as XML document:**

1. Go to a subsection of the **Technologies** section (**Categories and terms**, **Text objects**, **Sample Documents**, **Blanks**, **Stamps** or **Database Unloadings)** .
2. On the toolbar on the left part of the workspace, click and in the drop-down list select **Import**.
3. In the **Open** dialog window, select XML file that you want to load.
4. Click **Open** and wait till the data is loaded into the System.

**Note:**

If the catalog name in the import file matches the catalog name in the System, but paths to a catalog differ, then the catalog from the import file will not be added. If the catalog name in the import file matches the catalog name in the System, and paths to catalog also match, then data from the import file will be merged with the data in the System.

**Features of merging data during import:**

1. For catalogs, the following items missing in the System are added:
   a) child catalogs;
   b) elements of technologies.
2. For categories, the terms that are missing in the System will be added.
3. For text objects, templates that are missing in the System will be added.

**Note:**

The verifying functions that are present in the System will be replaced by functions from the file.

4. For a DB unloading, representations of the sample unloading will be added, if the contents of unloading in the System and the file are the same.

# 5.5 Managing Protected Objects

**What are protected objects needed for:**

Using protected objects allows you to check if intercepted data contain several elements of analysis at the same time: for example, a sample document, a text object and a database unloading. Thus you can configure the System so that it detected certain business documents: for example,vehicle certificate or declaration of insurance payment.

**Working with protected objects includes the following actions:**

| Action | Description |
|---|---|
| Creating a catalog of protected objects | Creating a catalog to which protected objects will be added |
| Creating a protected object | Creating a protected object and specifying its parameters |
| Adding elements of analysis | Adding elements of analysis to a protected object |
| Adding detection conditions | Specifying conditions for detecting added elements of analysis |
| Creating policies for protected objects and their catalogs | Creating a data protection policy for selected protected objects and their catalogs |
| Import and export of protected objects | Importing and exporting catalog structure, protected objects included in these catalogs and elements of analysis used in these protected objects |
| Activating and deactivating protected objects | Changing status of protected objects and their catalogs |

**See also:**

- "Protected Objects Section" - on the section where managing protected objects is performed

## 5.5.1 Creating a Catalog of Protected Objects

**Purpose:**
Create a catalog that will contain protected objects.

**Solution:**

1. Go to the **Protected objects** section.
2. On the toolbar in the left part of the workspace, click  **Create catalog of protected objects**.

> **Note:**
>
> You can create a new catalog of protected objects inside an existing catalog. To do this, select the target catalog in the list.

3. In the dialog box that appears, specify the catalog attributes (see "Catalogs of protected objects").
4. Click **Create**.

You can move the selected catalog using drag and drop. To do this, select the catalog in the list, press the left mouse button pressed and move the catalog to the desired location in the catalog structure holding the left mouse button pressed. Then release the mouse button.

> **Note:**
>
> The catalog will be moved with all nested elements including subcatalogs and protected objects. When you move a catalog, its status changes to the status of the catalog to which you are moving it.

**Additional information:**

Editing and deleting catalogs of protected objects are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.5.2 Creating a Protected Object

**Purpose:**
Create a protected object based on elements of technologies that are present in the System.

**Solution:**

1. Go to the **Protected objects** section.
2. On the left side of the workspace, select a catalog to which you want to add a new protected object, or create a new catalog (see "Creating Catalog of Protected Objects").
3. On the toolbar in the right part of the workspace, click  **Create Protected Object**.
4. In the window that opens, select elements based on which the protected object will be created (see "Adding Elements of Technologies").

5. Determine whether selected items should be included in one protected object, or a separate protected object should be created for each element:
    - If **Create a protected object for each selected item** option is selected, a set of protected objects for each selected element of technologies will be created. Attributes of the created protected objects are generated automatically (see "Protected objects"). Object names are generated based on the name technology and the element name, for example: "*Text object: Credit card number*".
    - If **Create a protected object for each selected item** option is not selected, then clicking **Create** opens an additional window where you can specify settings for the protected object: see step 7.
6. Click **Create**.
7. If **Create a protected object for each selected item** option has not been selected at step 5, the **Creating a protected object** window will open. In this window:
    a. Enter the name of protected object.
    b. On the **Elements of technologies** tab, that contains the selected items (see "Elements of Technologies"), you can add additional elements of technologies (for this, click **Select elements**) or remove elements from the list: for this, click ' x ' button in the row of the selected element.
    c. On the **Detection conditions** tab, specify conditions under which protected objects should be detected in intercepted data (for details, see "Adding Detection Conditions").
    d. If necessary, enter a description in the **Description** field.
    e. Click **Create**.

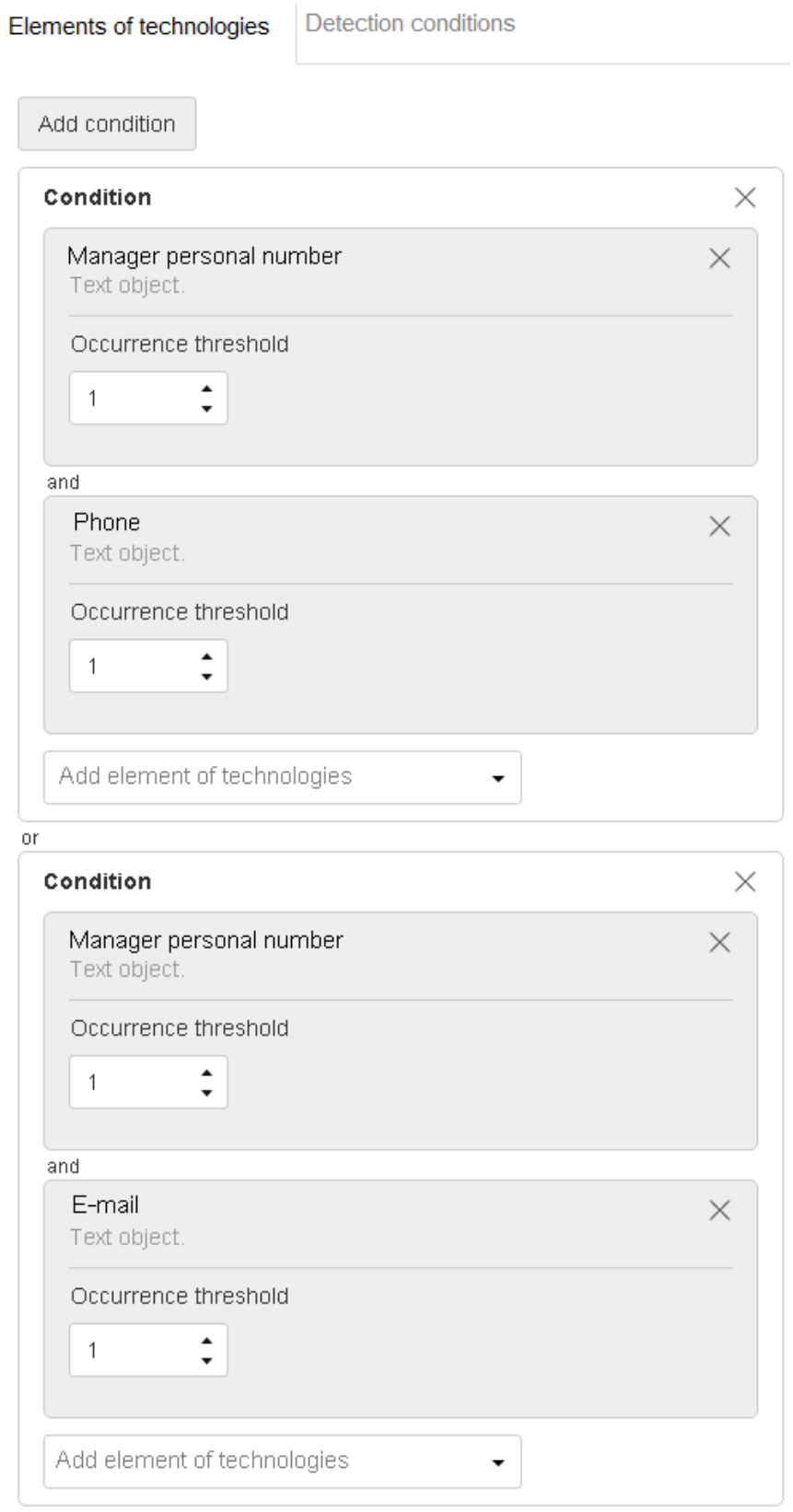
As a result, a protected object is created in the selected catalog (if you have selected the **Create a protected object for each selected item** option, several protected objects are created).You can move the created protected object to another catalog.To do this, select the required protected object in the list, press the left mouse button and move the protected object to the desired catalog holding the left mouse button pressed. Then release the mouse button.
***Example:*****If** you need to create a protected object *"Manager Personal Number"* that should be detected in the System when one of the following conditions is fulfilled:

- the interception object contains a personal number of the manager and an email;
- the interception object contains a personal number of the manager and a phone number.

**Then** create a new protected object, add the following elements of technologies:

- a text object *"Manager Personal Number"*
- a text object *"E-mail"*
- a text object *"Phone"*

and specify the following detection conditions for selected elements of technologies:




**Additional information:**

Protected objects can be edited and deleted by standard means:

- Editing Element
- Deleting Element

## 5.5.3 Adding Elements of Technologies

**Purpose:**
Add elements of technologies to a protected object.

**Solution:**

You can add elements of technologies when creating a new protected object or when editing an earlier created protected object (see "Creating Protected Objects").

**If you are creating a new protected object:**

1. In the **Create Protected Object** window, open a tab with desired elements (see "Window of Adding Elements of Technologies").
2. From the list of available elements, select elements, you want to add.

> **Note:**
>
> When you select a category that contains subcategories (the **Category** tab), all subcategories will also be selected. If you want to add particular subcategories, click on the arrow to the left of the category name, and, from the drop-down list, select check boxes in required fields.

3. To create a protected object based on several technologies, repeat steps 1-2 until you add all desired elements.
4. Click **Create**.

> **Note:**
>
> If the **Create a protected object for each selected item** option is selected, then, for each element of analysis, a separate protected object is created. Attributes of the protected object are set by the System automatically.

**If you are editing an earlier created protected object:**

1. In the **Edit Protected Object** window, click **Select elements**.
2. In the **Select elements of technologies** window that opens, open a tab with desired elements (see "Window of Adding Elements of Technologies").
3. From the list of available elements, select elements, you want to add.

**Note:**

If the protected object is included in a data protection policy on agents (see "Creating Data Protection Policy on Agents"), then you can only add categories and text objects to this protected object.

4. Click **Save**.

You can delete added elements of technologies. For this, on the **Elements of technologies** tab, click on the cross to the opposite of the desired element.

## 5.5.4 Adding Detection Conditions

**Reference information:**

A protected object can be detected in the event if:

1. The protected object status is **Active**.
2. The event contains elements of technologies included in the protected object with respect to specified detection conditions.

A catalog of protected objects will be detected in the event if:

1. A status of the catalog of protected objects is **Active**.
2. The event contains at least one protected object from the catalog.

**Purpose:**

Add detection conditions for a protected object.

**Solution:**

Detection conditions are added when creating protected objects. After you add selected elements of technologies to the protected object (see "Adding Elements of Technologies"), you need to specify detection conditions.

**Note:**

You can also add detection conditions when editing an earlier created protected object.

To add detection conditions for a protected object:

1. On the **Detection Conditions** tab, in the **Add element of technologies** field, click ▼ and, in the drop-down list, select the desired element.
2. The selected element will be added to the list of conditions. For some elements of technologies, you can specify additional detection conditions (see "Detection conditions").
3. If there are several elements of technologies in the protected object, you can add detection conditions for the other elements in one of the following ways:
    - If you need conditions to be combined with a conjunction (logical "AND"), add conditions as described in step 1.

In this case, all added conditions will be placed in the same **Condition** block and combined with a conjunction.

- If you need conditions (or groups of conditions) to be combined with a disjunction (logical “OR"), click the **Add condition** button.
  A new **Condition** block will be added. In this block, you can add conditions as described in step 1.
  In this case, all the **Condition** blocks will be combined with each other with a disjunction, and conditions within a single block will be combined with a conjunction.

4. Click **Create** if you are in the create mode, or **Save** if you are in the edit mode.

**Additional information:**

If you need to delete conditions, do either of the following:

- to delete a single condition, click x in the upper right corner of the panel with the required condition;
- to delete a block that contains conditions, click x in the upper right corner of the block.

## 5.5.5 Creating Policies for Protected Objects and Their Catalogs

**Purpose:**

Create a policy for protected objects and their catalogs directly from the section "Protected objects".

**To create a policy for a catalog of protected objects:**

1. Go to the **Protected objects** section.
2. In the **Catalogs of protected objects** list on the left side of the workspace, select a desired catalog.
3. On the toolbar in the left part of the workspace, click ▾ and in the drop-down list select one of the following items:
   - **Create data protection policy**
   - **Create policy on agent**
4. In the policy creation form that opens, specify the required settings (for more information, see "Policies and their Viewing Form").
5. Click **Save**.

The created policy will be triggered when detecting at least one protected object from the selected catalog.

**To create a policy for selected protected objects:**

1. Go to the **Protected objects** section.
2. In the **Catalogs of protected objects** list in the left part of the workspace, select the desired catalog.
3. In the right part of the workspace, a list of protected objects included in the selected catalog will be displayed. Left-click the desired protected object. To select multiple objects, use the Shift or Ctrl key.
4. On the toolbar in the right part of the workspace, click ▾ and in the drop-down list select one of the following items:

- **Create data protection policy**
- **Create policy on agent**

5. In the policy creation form that opens, specify the required settings (for more information, see "Policies and their Viewing Form").
6. Click **Save**.

The created policy will be triggered when detecting at least one of the selected protected objects.

## 5.5.6 Import and Export of Protected Objects

**Purpose:**

- export to a file catalog structure containing protected objects and elements of analysis used in them;
- load from file an earlier created catalog structure containing protected objects and elements of analysis used in them;

> **Note:**
>
> Export and import of protected objects cannot be performed, if the System configuration is being edited. In this case, an error message will be displayed.

**To export protected objects:**

1. Go to the section **Protected objects**.
2. On the toolbar in the left part of the workspace, click ▾ and in the drop-down list select **Export**.
3. In the window that opens, specify where you want to save the created archive.

The saved archive contains the .XML files that store information about the protected objects and elements of analysis used in them. Th structure of catalogs and elements of analysis is preserved when exporting.

**To import protected objects:**

1. Go to the section **Protected objects**.
2. On the toolbar in the left part of the workspace, click ▾ and in the drop-down list select **Import**.
3. In the window that opens, select a previously exported file that you want to download.
4. Wait till the protected objects are loaded into the System.

> **Note:**
>
> If the catalog name in the import file matches the catalog name in the System, but paths to a catalog differ, then the catalog from the import file will not not added.If the catalog name in the import file matches the catalog name in the System, and paths to catalog also match, then data from the import file will be merged with the data contained in the System.

**Features of merging data when importing:**

1. For catalogs, the following items missing in the System are added:
   a) child catalogs of protected objects
   b) protected objects
2. For protected objects, the following items missing in the System are added:
   a) elements of analysis
   b) detection conditions
3. For detection conditions, new nested conditions, including detecting parameters (for text objects, blanks and database unloadings) will be added.

### 5.5.7 Activating and Deactivating Protected Objects

By default, the status of all created protected objects and their catalogs is *Active* ( icon). If necessary, you can deactivate a created catalog of protected objects or a particular protected object in the catalog.

**To deactivate a catalog of protected objects:**

1. On the toolbar in the left part of the workspace, click and, in the drop-down list, select **Deactivate**.
2. The catalog status will change to *Inactive* ( icon).

If you need to reactivate a deactivated catalog, click and, in the drop-down list, select **Activate**.

**To deactivate a selected protected object:**

1. On the left part of the workspace, select the desired catalog.
2. On the left part of the workspace, left-click the desired protected object in the list.
3. On the toolbar in the right part of the workspace, click and, in the drop-down list, select **Deactivate**.
4. The status of the protected object will change to *Inactive* ( icon).

If you need to reactivate a deactivated protected object, click and, in the drop-down list, select **Activate**.

**Warning!**

Protected objects and their catalogs can be detected in intercepted data only if they are active.

## 5.6 Managing Crawler Subsystem

**What do you need the Crawler subsystem for?**

Managing the Crawler subsystem is required for scanning the following file storages:

- Shared network resources
- Local drives of workstations
- SharePoint 2007/2010/2013 file storage

**Managing the Crawler subsystem includes the following actions:**

| Action | Description |
|---|---|
| Configuring Scanner | After the administrator installs and configures the System, the user will get access to a scanner. To work with the scanner, the user can configure it |
| Creating a Job | To scan resources, you need to create a job |
| Launching and Stopping the Job | Running the job starts the scanning of the target file storages; when the job is finished, the scanning stops |
| Editing the Job | Changing job settings |
| Cleaning the Hash Base | Discarding file checksums saved in the System |
| Viewing Launch History | Viewing system information during the job progress |
| Saving Scan Report | Copying a report to a hard disk of your computer |

**See also:**

- "Crawler Section" - on the section where managing the Crawler subsystem is performed

## 5.6.1 Configuring Scanner

**Purpose:**
To configure the scanner of the Crawler subsystem.

**Solution:**

1. Go to the section **Crawler**.
2. On the toolbar on the left part of the workspace, click the **Edit scanner** button.
3. On the right part of the workspace, scanner attributes will be displayed (see "Scanner").
4. When you change at least one attribute, to the right of the **Edit scanner** button, the  icon will by displayed, indicating that scanning job for this scanner are not performed.
5. Change the required parameters.
6. Click **Save** to save your changes, or **Cancel** to exit the editing mode without saving changes.

When you save the scanner configuration the  icon will disappear, indicating that scanning job for this scanner can be performed.

**Additional information:**
The value of the **Do not display the following SID** attribute lists the standard SIDs. If necessary, the user can add own SID and set masks using regular expressions.

***Entry example:***

```
S-1-5-21-.*-(498|502|517|527)
```

This entry means that when Management Console displays the information on the object, it will not display the information that this file is available to accounts with any SIDs beginning with "S-1-5-21-" , having 0 in the middle or more of any characters, numbers, etc., and ending with " -498" or " -502" or " -517" or " -527".

*Matching SIDs:*
`S-1-5-21-12345-ABCDEF-498`
`S-1-5-21-527`

*Not matching SIDs:*
`1S-1-5-21-12345-ABCDEF-498` - does not start with "S-1-5-21-"
`S-1-5-21-527-` S-1-5-21 - starts with "S-527-" but ends with "527" rather than " -527"
`S-1-5-21-ABCDEF-100`- does not end with " -498" or " -502" or " -517" or " -527".
`S-1-5-21-ABCDEF-502--` does not end with " -498" or " -502" or " -517" or " -527".
`S-1-6-21-ABCDEF-502` - does not start with "S-1-5-21-".

**Note:**

More detail about the format of the regular expression language see in the article "Regular Expression Language".

## 5.6.2 Creating a Job

**Purpose:**
Add a scan job.

**Solution:**

1. Go to the **Crawler** section.
2. On the toolbar click + **Create job**.
3. On the right part of the workspace, on the **Details** tab, enter the job attributes (see “Scanning Job").
4. The following fields are obligatory:
   - **Scanning policy**;
   - **Scanned groups/workstations**;
   - **Schedule**.
5. Click **Save**.

***Example:***
If you need the System to assign Printed circuit board tag to objects created as result of detecting TXT files containing the phrase “printed board” and stored in existing corporate storage SharePointRepo, CorporateDataBase database:

Create the term with the text “printed circuit board” (see "Creating Terms") and a tag *Printed circuit board* (see "Managing Tags“), then apply the configuration (see “Applying System Configuration").
Then create a scanning job by selecting SharePoint as scanning policy and specifying following values of attributes:

- attribute **Address of DB resource** - value *SharePointRepo*;
- attribute **Name of DB resource** - value *CorporateDataBase*.

Create a policy and a rule of placement in it with the following attribute values:

- **Storage** - *File storage*; attributes have following values:
  - attribute **Enter a source** - value *SharePointRepo*;
  - attribute **Enter a path to storage** - value *CorporateDataBase*;
- **Tags** - tag *Printed circuit board*.

**Warning!**

While the job runs even with domain administrator rights, you may receive the error:

```
Access to the path <path_to_folder> is denied: Access to the path <path_to_folder>
is denied
```

where `<path_to_folder>` is an absolute path to the folder where the job runs.
This error can occur for example, if a user who is the owner of the folder, prohibited access to it.

## 5.6.3 Launching and Stopping the Job

**Purposes:**

1. To launch the scan job.
2. To stop the scan job.

**Solution:**

1. Launching scan job.
   a. Go to the **Crawler** section.
   b. Left-click the necessary job in the list.
   c. On the toolbar click  **Run job**.
2. Stopping scan job.
   a. Go to the **Crawler** section.
   b. Left-click the necessary job in the list.
   c. On the toolbar click  **Stop job**.

## 5.6.4 Editing the Job

**Purpose:**
To edit the scan job.

**Solution:**

1. Go to the **Crawler** section.
2. Left-click the necessary job in the list.
3. On the toolbar in the left part of the workspace, click  **Edit job**.

4. In the right part of the workspace, in the edit form that appears, modify the job attributes (see "Scanning Job").
5. Click **Save** to save your changes, or **Cancel** to exit the editing mode without saving changes.

## 5.6.5 Cleaning the Hash Base

**Reference information:**
To optimize the performance, Crawler provides the storage of **hashes** - checksums of files. If during previous scan job session the hash of some file was saved and in latest session of the same job the hash of this file was not changed, this means that the file was not exposed to changes and it should not be sent to Traffic Monitor server for processing. This reduces a load on a channel between Crawler and Traffic Monitor Server and a load on the Traffic Monitor Server itself; it also excludes duplication of identical events for each start of a scanning job.
Features of storing database of hashes:

- Hash database is saved separately for each scanning job. Therefore if some file was already processed by one job, then when creating and starting another job, it will not be considered.
- Hash sums are stored for files considering workstations at which these files were found. Therefore if the same file is located at several workstations, it will be processed individually for each workstation.

It is recommended to periodically clean the hash base. For example, when the Traffic Monitor configuration was edited - that is, according to a changed policy or the list of terms, etc, the decision if the intercepted object is a potential violation or not will be made by the System using another algorithm. As a result of cleaning the hash base, the job will “forget” that it ever processed any files and will send all files corresponding to conditions of this job for the analysis to the Traffic Monitor Server.

**Purpose:**
To clear the hash base.

**Solution:**

1. Go to the **Crawler** section.
2. Left-click the created job in the list.
3. On the toolbar, click  **Purge hashes**.

## 5.6.6 Viewing Launch History

**Reference information:**
The right part of the working area displays an information about launches of the selected scan job.

**Purpose:**
View the history of job launches.

**Solution:**

1. Go to the **Crawler** section.
2. Left-click the necessary job in the list.
3. View the summary in the right part of the workspace.

4. To view more information about the job and on the launch settings, left-click the necessary launch's entry in the list.
   Extended information is presented in the following tabs:
   - **Launch events** - the tab contains system information about the launch of scanning job.
   - **Launch parameters** - the tab contains the list of attributes of scanning job (see "Scanning Job").
   - **Current status** - the tab contains information about the current status of a launched job (for jobs with a status other than *Launched,* the tab is unavailable).

   To return to the summary information about the history of launches click the link **< Back**.

### 5.6.7 Saving Scan Report

**Purpose:**
To save a report on scanning.

**Solution:**

1. Go to the **Crawler** section.
2. Left-click the necessary job in the list.
   On the right part of the workspace a history of launching the job will be displayed.
3. Set check-boxes in required rows and click **Download xls report** in the upper part of the workspace.
4. Open the saved file in .xls format with standard means (e.g. MS Excel).

## 5.7 Managing Interception Objects

**What for do you need objects of interception?**

- track the statistics on violations of the corporate security policy;
- view information on a particular object;
- display interception objects by specified criteria.

**Working with interception objects consists of the following actions:**

| Action | Description |
|---|---|
| Viewing Summary on Violations/Violators | Viewing statistical information and selections on events |
| Viewing Events | Viewing data on every interception object |
| Managing Summaries | Generating summary on violations/violators |
| Making Decision on Object | Making user decision concerning the object |
| Adding and Delete Tags | Adding a tag to the event |
| Saving Events (for SMTP mail) | Saving the event to the disk in EML format |

| Action | Description |
|---|---|
| Dispatching Blocked Event | Sending a blocked message to the recipient |
| Creating Queries | Filtering interception object by specified criteria |

**See also:**

- "Events Section" - on the section, where you can manage interception objects
- "Dashboard Section" - on the section, where you can view statistics on interception objects

## 5.7.1 Viewing summary on violations/violators

The operation is performed in the **Dashboard** section (see "Dashboard Section")

**Purpose:**
View summary on violations/violators

**Solution:**

1. Go to the **Dashboard** section.
2. Configure the toolbar (see “Creating a Dashboard").
3. Add and configure the desired widget (see "Creating Widget" and "Editing Widget").
4. Examine the summary provided on the widget.

### 5.7.1.1 Creating Dashboard

**Purpose:**
Create a dashboard that will contain widgets.

**Solution:**

1. Go to the **Dashboard** section.
2. In the left part of the workspace, click  **Add**.
3. Specify the name of a new dashboard.
4. Click **Save**.

**Additional information:**

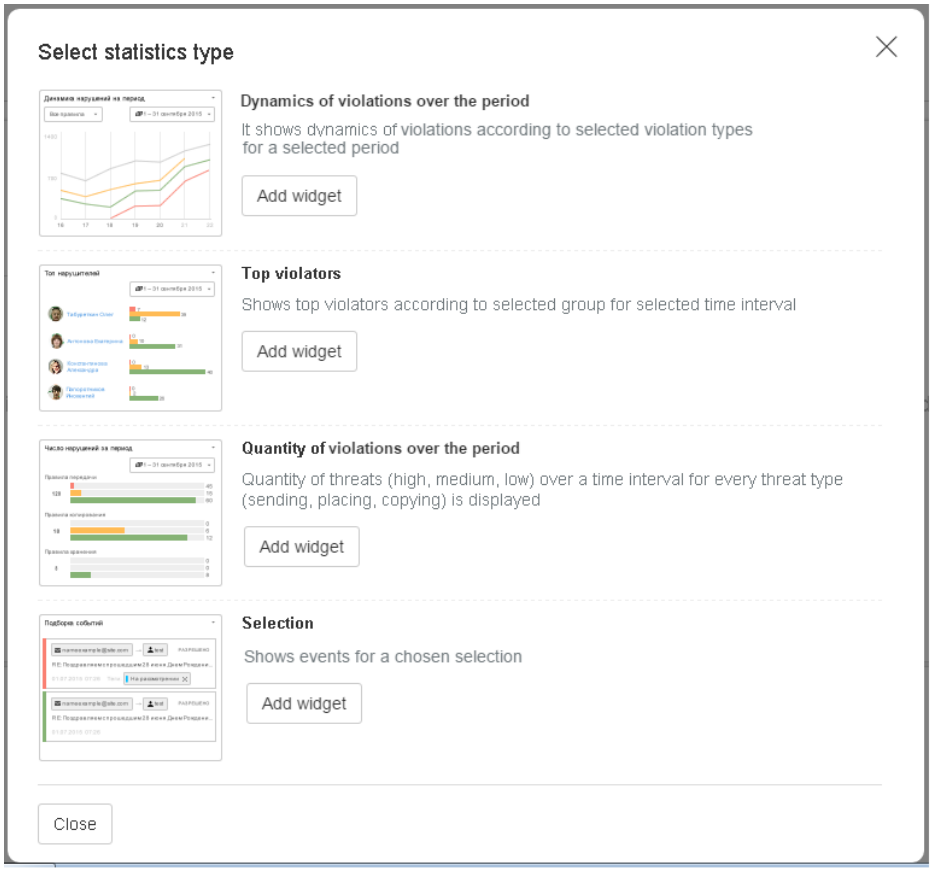
- Filling a dashboard is described in "Creating Widget".
- To delete a dashboard, go the dashboard which you want to delete and, on the tab with its name, click . In the confirmation window, click **Delete**.

### 5.7.1.2 Creating Widget

**Purpose:**
Create a widget in the dashboard pane.

**Solution:**

1. Go to the **Dashboard** section.
2. Select the dashboard, to which you want to add a widget, or create a new dashboard (see "Creating Dashboard").
3. Click **Add widget**.
4. In the **Select statistics type** window that opens, select a desired widget and click **Add widget** under its description.




   See details on widget types in "Widgets".
   You can add several widgets in succession. To do this, click **Add widget** under other widets you want to add: selected widgets will be added to the dashboard.
   You can add multiple widgets of the same type, and then configure them to display different types of data: for example, several widgets of **Summary** type to display events based on results of queries (for details on creating queries, see "Query Creation in Standard Mode" and "Query Creation in Advanced Mode").

5. Click **Close** or use ✕ button in the upper right corner of the window.
6. Configure added widgets to display required data: see "Configuring Widget".

**Additional information:**

1. You can move widget tiles to place them in a convenient order. To do this:
   a) Hover the mouse pointer over the tile header so that a standard cursor changed to a four-way arrow key.
   b) Hold down the left mouse button and, keeping it pressed, move the tile over the workspace until the target position of the tile is displayed as a dotted line.
   c) Release the left mouse button.

2. To edit a widget, in the right upper corner, click and, from the drop-down list, select **Edit**. In the **General widget settings** window that opens, change the required settings, then click **Save**.
3. To delete a widget, in the right upper corner, click and, from the drop-down list, select **Delete**. In the confirmation window, click **Yes**.

#### 5.7.1.3 Editing Widget

**Purpose:**
Configure a widget.

**Solution:**

1. Go to the **Dashboard** section and open the desired dashboard.
2. Select the desired widget or create a new one (see "Creating Widget").
3. Use interface elements located in the widget to specify the following parameters: the type of the rules whose violations will be displayed in the widget and the time period.
4. To change other parameters, click and, in the drop-down list, choose **Edit**.
5. In the **General widget settings** window that opens, specify required parameters (see "Widgets").
6. Click **Save**.

### 5.7.2 Viewing Events

**Purpose:**
View information on the interception object.

**Solution:**

1. Go to the **Events** section (see "Events Section").
2. Apply event filtering by creating and running a query (see "Creating queries").

> **Note:**
>
> The list displaysthe last 10000 events. Events are sorted by ID-number in descending order.

3. If required, change the list of fields to be displayed (see "Choosing event fields of view").
4. View event information on the event tile or in the string of a table (see point 3 in the diagram in "Events Section ").
5. If necessary, use a brief and detailed forms of viewing events.

## 5.7.2.1 Creating queries

**Purpose:**
Create a query that allows you to filter the interception objects.

**Solution:**

1. Go to the **Events** section (see "Events Section").
2. Select a query from the drop-down list of selections in the upper string of the left part of workspace or create a new one.

> **Note:**
>
> There are two ways to create a query: standard mode and advanced mode.

3. Apply the query by clicking  **Execute query** (when creating a query, you can use **Save and execute**).

> **Note:**
>
> To hide the results of the query, to the right of the name of the query in the query list, click .

**See also:**

- "Query Creation in Standard Mode" - on how to create a standard query
- "Query Creation in Extended Mode" - on how to create an extended query

### 5.7.2.1.1 Query Creation in Standard Mode

**Purpose:**
Create a query to search for events which satisfy specified conditions.

**Solution:**

1. Go to the **Events** section.
2. On the toolbar in the upper string of the left side of workspace click  **Add query**.
3. In the drop-down list, select **Standard query**. In the right part of the workspace, a query creation form will open.
4. In the **Name** field, specify the name of the query.
5. On the **Condition** tab, fill in the fields which will be used for search of events (see "Condition").
6. On the **Display fields** tab, select attributes whose values will be displayed for the found events (see "Display fields").
7. To allow other users to view and edit the query, on the **Access parameters** tab, clear the **The query is available only to the owner** check box (by default, the check box is selected).
8. Click:
    - **Save** - to save the filter.

- **Save and execute** - to save and apply the filter.

> **Note:**
>
> For more flexible configuration of search conditions, you can use the advanced mode.

***Example:***

If you want the System to display events with a *High* violation level and the assigned policy *Legal documentation*:
then create a filter in the standard mode and specify the following attributes: for **Violation level** attribute, specify the *High* value; for **Policy** attribute - the *Legal documentation* value.

**Additional information:**
Editing and deleting queries are performed by standard means:

- Editing Element;
- Deleting Element.

### 5.7.2.1.2 Query Creation in Advanced Mode

**Purpose:**
Configure search conditions for events more clearly.

**Solution:**

1. Go to the **Events** section.
2. On the toolbar in the upper string of the left side of workspace click + **Add query**.
3. In the drop-down list, select **Advanced query**. A query creation window will open.
4. In the **Name** field, specify the name of the query.
5. On the **Condition** tab, in the **Add condition** drop-down list, select parameters based on which search will be performed.
6. By default, added attributes are associated with conjunction operation (logical AND). To change the operation type, left-click on the and icon. The icon will change to or that stands for the disjunction operation (logical OR).
7. Use **Group of parameters** element to separate attributes combined with conjunction operation (logical AND) from attributes combined with disjunction operation (logical OR) (see "Advanced mode").
8. On the **Display fields** tab, select attributes whose values will be displayed for found events (see "Display fields").
9. To allow other users to view and edit the query, on the **Access parameters** tab, clear the **The query is available only to the owner** check box (by default, the check box is selected).
10. Click **Save**.

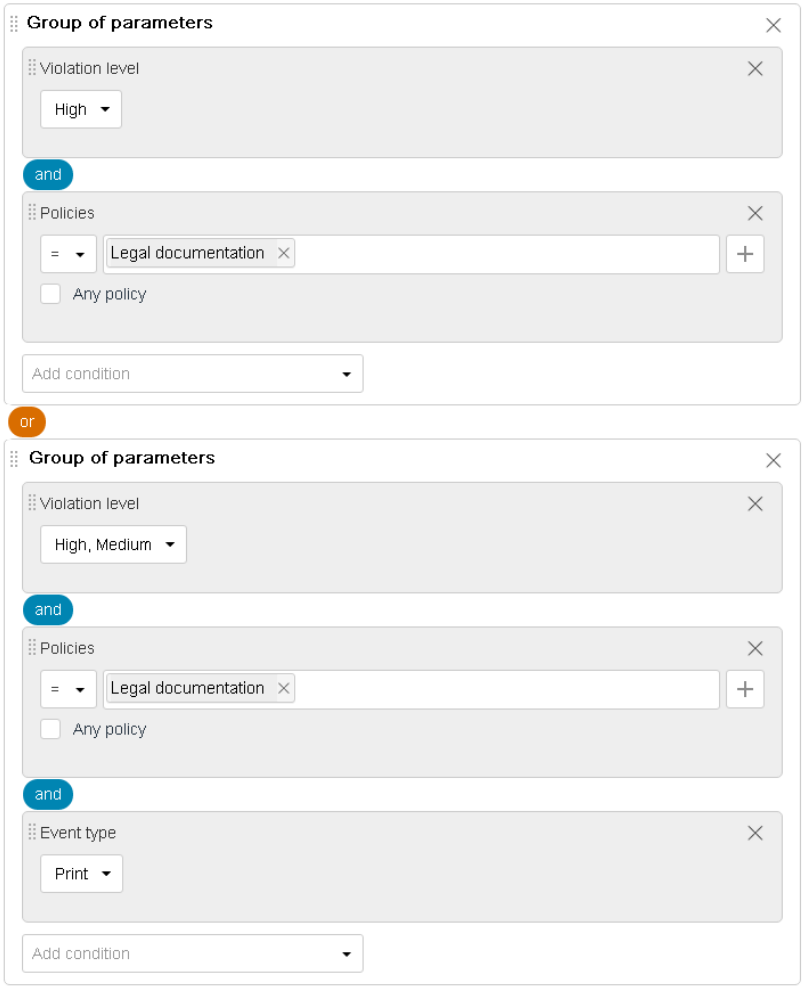
***Example 1:***
If you want the System to display events:

- with *High* violation level and the assigned policy *Legal documentation*;

- with the levels of violation *High* and *Medium* and the assigned policy *Legal documentation* and event type *Stamp*:

Then create a query in the advanced mode and specify two groups of parameters combined with the disjunction operation (see the picture below):

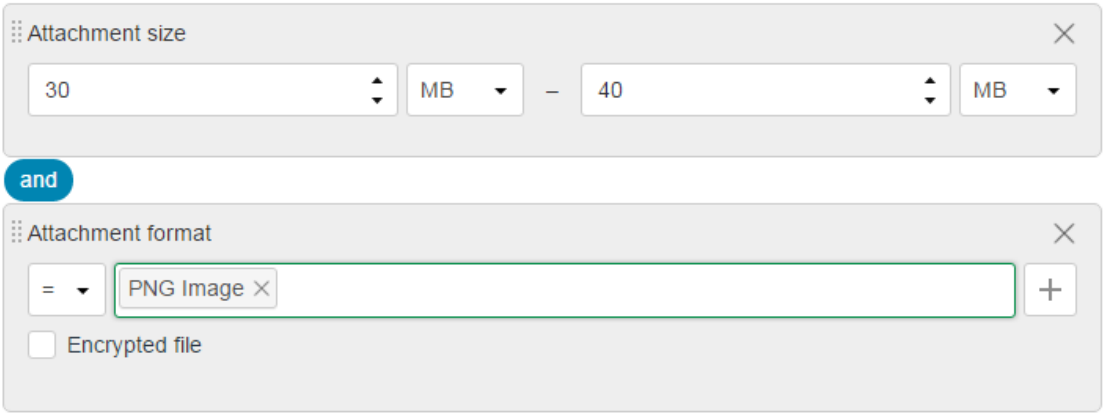
- The first group of parameters contains attributes with the following values:
  - **Violation level** - *High*;
  - **Policy** - *Legal documentation*;
- The second group of parameters contains attributes with the following values:
  - **Violation level** - *High* and *Medium*;
  - **Policy** - *Legal documentation*;
  - **Event type** - *Stamp*;
- Attributes within groups are combined with the conjunction operation.



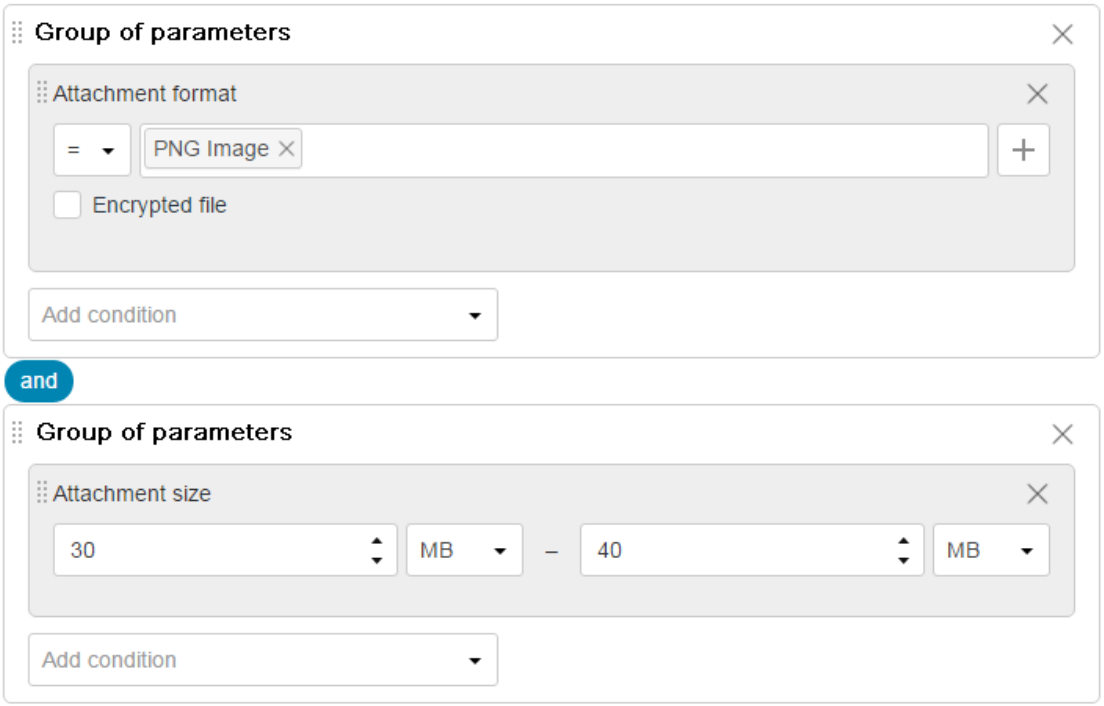

***Example 2:***
If conditions are specified for object attachments, then, for objects with several attachments, the conditions will apply the following way:

1. If several conditions within a group of parameters are combined by the operation of the logical “AND”, then query results will contain objects with at least one attachment that satisfies all specified

conditions. In the example below, the query results will display objects with at least one attachment of PNG format whose size is between 30 and 40 MB.




2. If each condition is in a separate group of parameters and groups are combined by the operation of the logical “AND”, then query results will contain objects, for which all conditions are satisfied, but not necessarily for the same attachment. In the example below, the query results will display objects with at least one attachment of PNG format and at least one attachment whose size is between 30 and 40 MB.

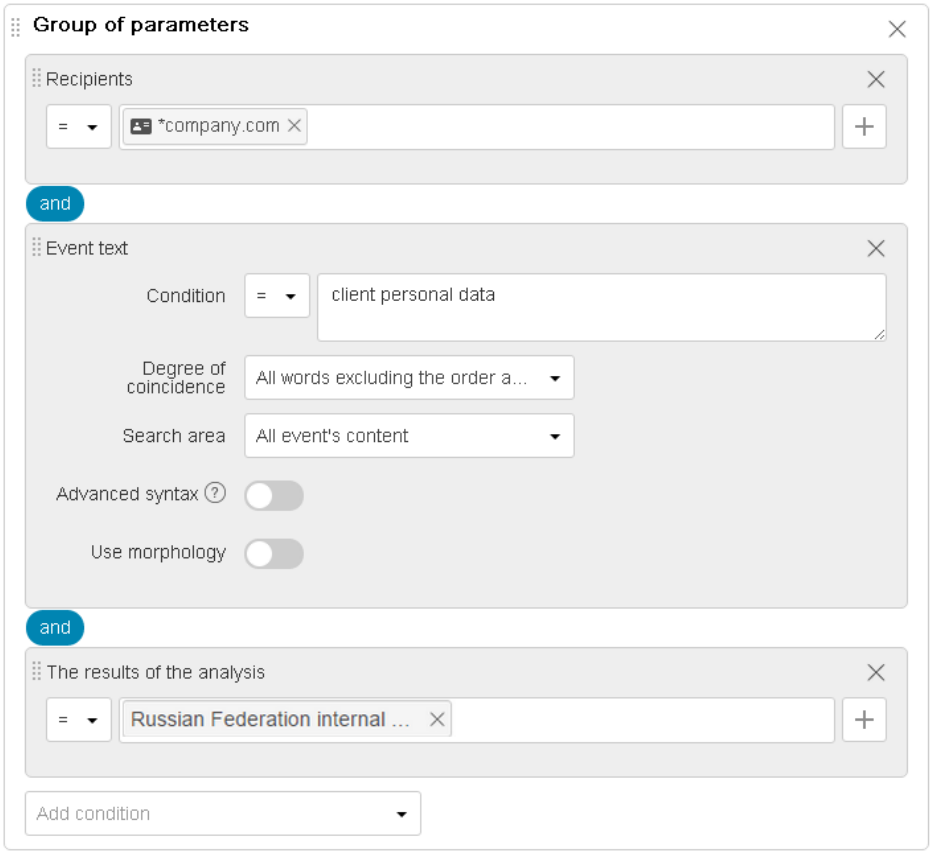



***Example 3:***
If you want the System to display events:

- are sent within the company;
- not containing the words *Client personal data* in the text of the event;
- contain pass numbers:

Create a query in the advanced mode and, within one group of parameters, specify the following attributes combined with the conjunction operation (see the picture below):

- `Recipients` - **company.com*;
- `Event text` - *"Client personal data"*; the search is performed in the *All words irrespective of their order and distance between words* mode and a negation parameter is applied to the attribute;
- `Search area` - *"All contents of event"*;
- `Results of analysis` - the text object *"Pass number"*.




**Additional information:**
Editing and deleting queries are performed by standard means:

- Editing Element;
- Deleting Element.

## 5.7.2.1.3 Using Advanced Syntax

**Purpose:**
Configure full-text search of events by using extended syntax.

**Solution:**

1. Switch to the advanced mode of the query creation.
2. On the **Condition** tab, in the **Add condition** drop-down list, select the **Event text** parameter.
3. Select **Advanced syntax**.
4. In the **Condition** field, enter search text using logical operators:"|","-", "!", "()" and others.

5. Specify other query parameters (for details, see "Query Creation in Advanced Mode").
6. Click **Save**.

Detailed information on query creation using logical operators you can find in the internet article about Search query language Sphinx.

***Example:***

If you want that the event text:

- contained words *“personal data”* and *“private data”*;
- did not contain the phrase *"confidential information"*,

create the following query using advanced syntax:

```
(personal | private) data - "confidential information"
```

### 5.7.2.2 Choosing Event Fields of View

**Reference information:**
By default the event tile (or table string - depending on chosen style) displays all event attributes.

**Purpose:**
To select attributes of interception objects that will be displayed.

**Solution:**

1. Go to the **Events** section.
2. Do either of the following:
   - Edit an existing query. For this, click  **Edit query**;
   - Create a new query.

> **Note:**
> There are two ways to create a query: standard mode and advanced mode.

3. On the right part of the workspace select the **Display fields** tab.
4. Move all target attributes to the right field and all unwanted ones - to the left (see "Display fields"):
   - Left-click on the entry in the left field to move it to the right field;
   - Left-click on the entry in the right field to move it to the left field.
5. Click:
   - **Save** - to save a query.
   - **Save and execute** - to save and apply the changed query.

### 5.7.2.3 Viewing Brief Event Form

**Purpose:**
Viewing brief information on interception objects.

**Solution:**

1. Go to the **Events** section.
2. Create a query or run an earlier created query (see "Creating Queries").
3. Select the tile of the target event in the list (or a raw of the target event in the event table).
4. View the summary in the right part of the workspace. In the upper part of the form, you can view the event parameters; in the lower part, the event contents is displayed.
5. To view information on senders, recipients or computers, click the desired value. A card for the selected person or computer will be displayed.
   To view data on senders, recipients or computers, click the desired value. A card for selected person or computer will be displayed.
   When viewing the card, you can:
   a. Assign a status to a person/computer. For this, click Set status link and, in the **Adding status** window, select desired statuses. Then click **Save**.
   b. View detailed information on a person/computer in "Persons" section. For this, click Person profile link (for persons) or Go to computer link (for computers).
   c. View screenshot for a person/computer (if there are screenshots for a person, then icon is displayed next to the person name). For this, click Screenshots link. The **Screenshots** tab for the selected person or computer will open.

> **Note:**
>
> If there are screenshots taken within an hour before or after the event, the Screenshots near the event link is displayed for persons. Clicking this link opens the **Screenshots** tab with the screenshot whose creation time is closest to the event.

6. To view information about the triggered policy in the "Policies" section, click the name of the triggered policy.
7. If the event has attachments, you can save the attachment to your computer. For this, click next to the attachment name and select **save attachment to disk** command.
8. To get detailed information on the event, in the right upper corner of the form, click **Detailed information**.

**See also:**

- "Brief Event Viewing Form" - on the form with general information about the event.
- "Viewing Detailed Event Form" - on displaying detailed information about the event.
- "Viewing Screenshots" - on viewing screenshots for persons or computers

## 5.7.2.4 Viewing Detailed Event Form

**Purpose:**
To view a detailed information on the interception object.

**Solution:**

1. Go to the **Events** section.
2. Create a query or run an earlier created query (see “Creating Queries").
3. Select a tile of target event from the list (or a string of target event from the table). The right part of the workspace will display a brief event viewing form.
4. To open the detailed viewing form, click **Detailed information**.
5. In the **Detailed information on event** window that appears, view the required information. Information on the event is presented in the following blocks: **General information**, **Protected objects**, and **Event content** (see "Detailed Event Viewing Form“).
6. When viewing the event parameters, you can get additional information about persons, computers, and policies of the event (see "Viewing Brief Event Form“, i. 5-6).
7. To close the detailed form, click ✕ in the upper right corner of the window.

**See also:**

- "Detailed Event Viewing Form“ - on the detailed event viewing form
- "Viewing Brief Event Form“ - on displaying general information about the event

## 5.7.3 Managing Dashboard Summaries

**Purpose:**
Create and view dashboard summaries.

**Solution:**
Includes the following actions:

| Action | Description |
|---|---|
| Creating a summary | Creating an unloading on the configured dashboard |
| Viewing a Summary | Viewing files that contain the generated unloading in PDF or HTML |

**See also:**

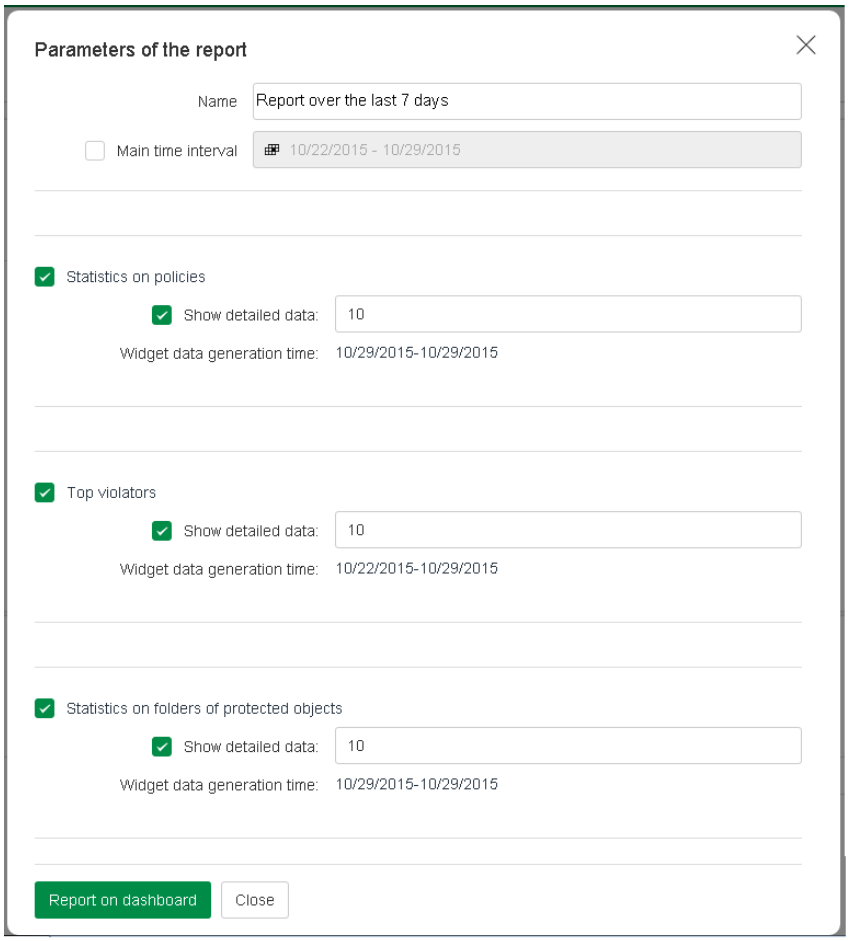
- "Dashboard summary" - on the section where managing summaries is performed

### 5.7.3.1 Creating a Summary

**Purpose:**
To create a dashboard summary for intercepted objects.

**Solution:**

1. Go to the **Dashboard** section.
2. In the right upper corner, click **Unload**.
3. In the window that opens, specify the summary attributes (see "Dashboard Summary").




4. Make sure that you have selected checkboxes of all widgets whose data you want to include in the summary.

> **Note:**
>
> The dashboard summary does not include data from the "Selection" widget.

5. If you want to manually specify the period, for which the summary will be generated, select the **Common period** check box and enter the start and the end date. If this option is deselected, then, for each widget, the summary will be generated for the period specified in the widget properties.
6. Click **DReport on dashboard**.

In the upper right corner of the workspace, you can see information on the summary status.

Once the summary is generated, you will be prompted to openit in PDF or HTML format.

All created summaries are stored in the System and are available by clicking **View the list of summaries** in the right upper corner of the workspace. For details, see “Viewing Summary".

> **Note:**

If you remove or modify a widget, then already created summaries, which contain that widget, will not be changed.

### 5.7.3.2 Viewing a Summary

**Purpose:**
View a created summary on intercepted objects.

**Solution:**
When the summary generation is complete, a message is displayed in the right upper corner of the workspace. In this message, you are offered to open the summary in PDF or HTML format.




Click on the **pfd** or **html** link to open the summary in a new browser window. You can also save, send or print the created summary by standard means of your browser and operating system.
All created summaries are stored in the System. To view the list of summaries, click the **View the list of summaries** button.

To view the list of summaries:

1. Go to the **Dashboard** section.
2. In the right upper corner of the workspace, click  **View the list of summaries**.
3. The **Reports** window with the list of generated summaries will open. In the Report type column, next to the desired summary, click:
   - **PDF** - if you want to display the summary in PDF format;
   - **HTML** - if you want to display the summary in HTML format.

   **Note:**

   You can sort reports in the list by creation date or use the **Search** field to find the desired report by name.
4. A new browser tab will display the summary you have created.

## 5.7.4 Making Decision on Object

**Purpose:**
To make a decision on the object.

**Solution:**

1. Go to the **Events** section.
2. Left-click the target event to select it.
3. On the toolbar, click
   - **Violation** - for events that violate the corporate security policy. For events with *Quarantine* verdict, the verdict value will change to *Blocked*.
   - **No violation** - for events that do not violate the corporate security policy. For events with *Quarantine* verdict, the verdict value will change to *Allowed*.

     **Warning!**

     If the *Block* mode is used in the System, then as a result of this decision, SMTP messages quarantined by the System will be dispatched and the message sender will be notified via email. For details, see “Dispatching Blocked Event".
   - **No decision** - if for now the user has not decidede a decision whether the event violates the corporate security policy.
   - **Requires additional proceeding** - if additional actions are needed to make a decision.

**See also:**

- "Retrospective data analysis, user decision on an object“ - on making user decision.

## 5.7.5 Adding and Deleting Tags

**Purpose:**
Add a tag to the interception object.

**Solution:**

1. Go to the **Events** section.
2. Left-click the target event to select it.
3. On the toolbar, click **Set tag**.
4. In the window that opens, select the desired tag by flagging it.
5. Click **Save**.

To delete a tag, click X next to the tag name in the event tile.

**See also:**

- "Tags" - on the interface of Management console section where tags are managed
- "Managing Tags" - on filling a tag catalog

## 5.7.6 Saving Events (for SMTP mail)

**Purpose:**
Save interception object (SMTP-letter).

**Solution:**

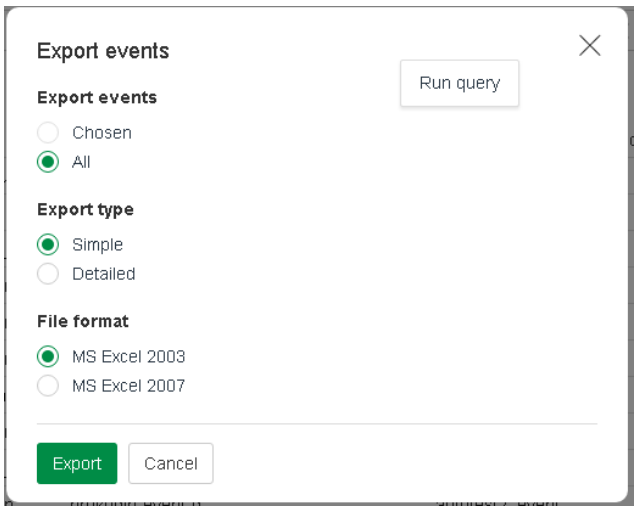
1. Go to the **Events** section.
2. Left-click the target event to select it.
3. In the brief event viewing form located in the right part of the workspace, click .
   The download process will start. When downloading is complete, you can open the event file and view its contents.

## 5.7.7 Event Export

**Purpose:**
Save information on events to the computer hard drive.

**Solution:**

1. Go to the **Events** section.
2. Click the table viewing form icon .
3. Run the query to retrieve objects.
4. Select the event you want to export. To select multiple events, use the Shift or Ctrl key.
   If you want to generate unloading for all available events, skip this item.
5. On the toolbar click  and in the drop-down list select **Export event**.
   The **Export events** dialog box will open.




6. Make sure that for the **Export event** parameter, the correct value is set: **Chosen**, if you want to export individual events, or **All**, if you want to generate unloading for all detected events.
7. Specify other export options: export type (Simple or Detailed) and export file format (MS Excel 2003 or MS Excel 2007).

8. Click **Export**.

When the operation is completed, in the upper right corner you will see a notification. To open the export file, click **download**.

## 5.7.8 Dispatching a Quarantined Event

**Reference information:**
If the System (in the *Blocking* transport mode) recognizes a transferred SMTP-letter as a potential violation and moves it to quarantine, the security officer can then review the decision of the System and allow sending this letter. In this case, the System dispatches the letter and notifies the person who has sent it.

**Purpose:**
Send a quarantined letter to the addressee.

**Solution:**

> **Warning!**
>
> You can dispatch the object with a *Quarantine* verdict. Objects with a *Blocked* verdict cannot be dispatched.

1. Go to the **Events** section.
2. Left-click the target event.
3. On the toolbar in the left part of the workspace, click  **No violation**.

**See also:**

- "Retrospective Data Analysis, User Decision on an Object" - general information on making decisions
- "Making Decision on Event" - on how to make a decision on the object

# 5.8 Configuring System Response

> **Warning!**
>
> For the changes described in this section to be used in the System, apply the configuration. For details, see "Configuring the System" and "Applying System Configuration".

**Reference information:**
The System response determines the actions that the System performs when detecting violations of the corporate security policy. You can specify these actions when creating rules for data protection policies and person control policies.(see "Policies Section").The System also includes preset policies (see “Default Policies").
Sometimes during operation of the System, the analysis and decision-making subsystems cannot use the

policy: for example, the policy has not been created or has been deleted, or an error occurred when applying the policy. In this case, no attributes are assigned to the objects, and the **Processing messages** window of the detailed event viewing form displays information about errors that occurred during the processing (see "Detailed Event Viewing Form").

**Why do you need to configure the System reactions:**
When you configure the System reactions you can specify that in the case of corporate security policy violations (e.g. sending a confidential document outside the company) or detecting the improper use of work time (e.g. visiting entertaining websites from the office computer), the System should:

- send notifications to violators and inform the Management Console users;
- assign a verdict to the interception object;
- assign a violation level, statuses, and tags to the interception object.

**Configuring the System response includes:**

| Action | Description |
|---|---|
| Creating data protection policies | Data protection policy is a set of rules that regulate data transfer, copying, placement, and usage of the clipboard.<br>Allows you to specify actions that may trigger policy rules. |
| Creating data protection policies on agents | Data protection policy on agents is a set of transfer and copy rules that apply directly on Device Monitor agents.<br>Allows you to specify actions that may trigger policy rules. |
| Creating person control policies | Allows you to specify the list of controlled persons whose actions may trigger policy rules |
| Creating rules | Defining what is a violation of policy rules, and what actions will be done in the event of violation |
| Notifications on responded rule | If the rule is triggered, the System sends notification to specified Console users |

**Note:**

If there are a lot of policies in the Management Console, you can filter the policy list by specified criteria (for details, see “Filtering the List of Policies").

**See also:**

- "Policies Section" - on the section where you can manage policies

## 5.8.1 General Information on Policies

The section describes the order of applying configured System policies (a set of rules according to which objects are analysed and processed) to events (intercepted objects of network traffic).

The System policies are divided into three groups:

- Data Protection Policies - allow you to set up rules of transfer, copying, placement, and using clipboard

- Data Protection Policies on Agents - allow you to set up transfer and copy rules that apply directly on Device Monitor agents
- Person Control Policies - allow you to set up rules for monitoring actions of individual persons and groups

The System applies policies to events in the following order:

1. The System checks if the event conforms to any active data protection policy on agents.
2. If the event has triggered a policy, the sub-events are considered.
3. For each sub-event, the matching rules are selected (rules triggering to this sub-event).
4. Triggered rules are divided into sub-rules.
5. From sub-rules corresponding to the event, the ones with the highest priority are selected.
6. The actions specified in triggered sub-rules of the highest priority apply to the interception object.
7. If there are sub-events without matching rules, default actions are executed (if they are specified for this type of rules).

Then steps 2-7 are repeated for all active data protection policies and then for all active person control policies.

For more information about accompanying processes, see:

- Dividing events into sub-events
- Dividing rules into sub-rules
- Determining the priority sub-rule
- Order of applying actions according to selected priority rules
- Example of applying a policy

### 5.8.1.1 Dividing events to sub-events

As a result of processing an object, the System assigns a number of attributes to this object (see “Object analysis and Decision on Object"). If any attribute of the event gets multiple values (for example, multiple recipients of SMTP messages, or matching of a POST request text to multiple categories, etc.), the System treats this event as a combination of several sub-events with unique attribute values.
For example, if an intercepted event has the following attributes:

| **Sender** | **Recipient** | **Protocol** | **Date** |
|---|---|---|---|
| Person: Smith, Person: Johns | Person: Williams, Person: Johns, Person: Smith | Skype | 09:23 |

then the System divides into the following sub-events:

| **Sender** | **Recipient** | **Protocol** | **Date** |
|---|---|---|---|
| Person: Smith | Person: Williams | Skype | 09:23 |
| Person: Smith | Person: Johns | Skype | 09:23 |
| Person: Smith | Person: Smith | Skype | 09:23 |

| Sender | Recipient | Protocol | Date |
|---|---|---|---|
| Person: Johns | Person: Williams | Skype | 09:23 |
| Person: Johns | Person: Johns | Skype | 09:23 |
| Person: Johns | Person: Smith | Skype | 09:23 |

### 5.8.1.2 Dividing rules to sub-rules

When applying rules of an active policy, the System also divides rules into sub-rules in order to determine sub-rules with the highest priority.
For this, of all policy rules, the System selects rules that match the intercepted event by the following attributes: ***Sender***, ***Recipient***, ***Protocol***. For example:

| Sender | Direction | Recipient | Protocol | Date | Reaction |
|---|---|---|---|---|---|
| Group: Lawyers, The Person: Smith, Person: Johns | -> | Group: Marketing, Person: Williams | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Group: Logistics | -> | Group: Sales, Group: Delivery | Skype | 10:00-19:00 | Notify: Johns Violation level: Medium |
| Group: Financial | -><br><- | Group: Lawyers, Group: Sales | | | Notify: Miller Violation level: High |

Then the System splits the rule into sub-rules for each pair of senders-recipients. The two-way data transfer (for example, a message session in a chat) is split with unification of direction:

| Sender | Direction | Recipient | Protocol | Date | Reaction |
|---|---|---|---|---|---|
| Group: Lawyers | -> | Group: Marketing | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Group: Lawyers | -> | Person: Williams | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Person: Smith | -> | Group: Marketing | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Person: Smith | -> | Person: Williams | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Person: Johns | -> | Group: Marketing | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Person: Johns | -> | Person: Williams | SMTP | 08:00-20:00 | Notify: Thomas Violation level: Low |
| Group: Logistics | -> | Group: Sales | Skype | 10:00-19:00 | Notify: Johns Violation level: Medium |

| Sender | Direction | Recipient | Protocol | Date | Reaction |
|---|---|---|---|---|---|
| Group: Logistics | -> | Group: Delivery | Skype | 10:00-19:00 | Notify: Johns<br>Violation level: Medium |
| Group: Financial | -> | Group: Lawyers | | | Notify: Miller<br>Violation level: High |
| Group: Financial | -> | Group: Sales | | | Notify: Miller<br>Violation level: High |
| Group: Lawyers | -> | Group: Financial | | | Notify: Miller<br>Violation level: High |
| Group: Sales | -> | Group: Financial | | | Notify: Miller<br>Violation level: High |

### 5.8.1.3 Determining the priority sub-rule

The rule is determined by (in descending order):

1. Priority of the sender-receiver pair
2. Whether the rule has conditions of time and protocol
3. Whether the rule has conditions of time
4. Whether the rule has conditions of protocol

The priority sender-receiver pair is the one that has the highest total number of points of a sender and a recipient:

| Sender/Recipient | Number of points |
|---|---|
| Contact | 10000 |
| Person | 5000 |
| Group | 2500 |
| Domain | 1250 |
| URL | 600 |
| List of resources | 300 |
| Deny List of resources | 150 |
| Deny URL | 75 |
| Deny Domain | 35 |
| Deny Group | 15 |
| Dena Person | 7 |
| Deny Contact | 3 |

| Sender/Recipient | Number of points |
|---|---|
| Any | 1 |

For example, the rule with a condition of forwarding from any sender to a specific contact (10000 + 1 = 10001) has a higher priority than the rule with a condition of forwarding from a particular person to a group of persons (5000 + 2500 = 7500).
If two or more rules have an equal number of points for sender-recipient, then the presence of conditions of time and protocol in the rule is taken into consideration. If, in this respect, these rules are equal too, then several high-priority rules with the same priority are selected.
If a sub-event has no matching rules, then a default rule is selected (see “Determining System Default Response").

### 5.8.1.4 Order of applying actions according to the selected priority rules

The System assigns the reaction by performing actions from selected priority rules in the following order:

1. All persons specified in the selected rules are notified
2. All statuses specified in the selected rules are assigned
3. The highest level of violation specified in the selected rules is assigned to the event
4. The event is deleted if deletion is specified in at least one rule
5. The sending is blocked if at least one rule blocks the sending
6. All tags specified in the selected rules are assigned to the event

### 5.8.1.5 Example:

Let the System have two policies:

| Policy №1 | | | | | |
|---|---|---|---|---|---|
| Catalogue of protected objects: Accounts | | | | | |
| Rule number | Sender | Recipient | Date | **Protocol** | Reaction |
| 1.1 | Group: Sales Department | Group: Accounts Department | 08:00-20:00 | SMTP | Violation: None |
| 1.2 | Smith | Group: Accounts Department | | SMTP | Violation: None |
| 1.3 | Smith | <>Perimeter: Company | | | Violation: Medium |
| 1.4 | Default: | | | | Violation: High |

| Policy №2 | | | | | |
|---|---|---|---|---|---|
| Catalogue of protected objects: Contract | | | | | |
| Rule number | Sender | Recipient | Date | **Protocol** | Reaction |

| Policy №2 | | | | | |
|---|---|---|---|---|---|
| 2.1 | Group: Sales Department | <>Perimeter: Company | 08:00-20:00 | SMTP | Violation: None |
| 2.2 | Smith | <>Perimeter: Company | | SMTP | Violation: None |
| 2.3 | Default: | | | | Violation: None |

Smith is a member of the "*Sales Department*" group. Johns belongs to the group "*Accounts Department*". E-mail `williams@mail.com` is outside the compony perimeter.
There is an event:

| Data | Sender | Recipient | Date | **Protocol** |
|---|---|---|---|---|
| Protected objects: Accounting, Contract | Smith | Johns, williams@mail.com | 19:00 | SMTP |

This event consists of two sub-events, with different "sender-recipient" pairs: "Smith->Johns" and "Smith-> williams@mail.com".

**1. Check for conformance to policy №1.**

The event confirms to the policy №1 as it contains a *Group of protected objects - Accounts*.
The "Smith->Johns" sub-event is considered:

| Sender | Recipient | Date | **Protocol** |
|---|---|---|---|
| Smith | Johns | 19:00 | SMTP |

This event has two sub-rules: №1.1 and 1.2. The more priority one is the sub-rule №1. Therefore, the rule №1.2 is selected.
The "Smith-> williams@mail.com" sub-event is considered:

| Sender | Recipient | Date | **Protocol** |
|---|---|---|---|
| Smith | williams@mail.com | 19:00 | SMTP |

This sub-event confirms to the sub-rule №1.3 only. Therefore, the rule №1.3 is selected

**2. Check for conformance to policy №2.**

The event confirms to the policy №2 as it contains a *Group of protected objects Contract.*

The "Smith->Johns" sub-event is considered:

| Sender | Recipient | Date | **Protocol** |
|---|---|---|---|
| Smith | Johns | 19:00 | SMTP |

This sub-event confirms to the sub-rule №2.3 only. Therefore, the rule №2.3 is selected
The "Smith->williams@mail.com" sub-event is considered:

| Sender | Recipient | Date | **Protocol** |
|---|---|---|---|
| Smith | williams@mail.com | 19:00 | SMTP |

This event has two sub-rules: №2.1 and 2.2. The more priority one is the sub-rule №1. Therefore, the rule №2.2 is selected.

**3 The selected actions are applied : №1.2, №1.3, № 2.3, №2.2**

## 5.8.2 Preset Policies

There are the following preset policies in the System:

- Data protection policies for confidential data
- Person control policy
- Policy regulating transfer of password-protected data
- Policy regulating visiting web resources
- Policy that excludes mailing lists from interception

**Note:**

When deleting the database scheme (see "*Infowatch Traffic Monitor. User Guide*", "Deleting the Database Scheme" article), policies (including preset ones) are also deleted from the System.

To redeploy the preset policies, do the following:

1. Create **/opt/iw/tm5/www/backend/protected/runtime/first_run** file on behalf of **iwtm** user;
2. Restart **iw_kicker** process:
   ```
   service iwtm restart kicker
   ```

Then you need to create other policies anew (see "Creating Data Protection Policy", "Creating Data Protection Policy on Agents", and "Creating Person Control Policy").

### 5.8.2.1 Data Protection Policy

By default, the System contains one data protection policy for each preinstalled catalog of protected objects (for the list of preinstalled catalogs, see "Protected Objects").

Default policies have the following attribute values:

| **Attribute** | **Value** |
|---|---|
| Policy name | <Name of the catalog of protected objects> |
| Status | Active |
| Period of activity | Not limited |
| Type of objects of research | <Name of the catalog of protected objects> |

where <Name of the catalog of protected objects> is the name of the catalog for which the policy is created.

Each policy contains the following rules:

**Rules of transfer**

1. *A rule that regulates transferring confidential data outside the company perimeter*.
   **If** an employee sends traffic of any type outside the company perimeter any day of the week,
   **Then** the System performs the following actions:
   - sets the *Allowed* value to the *Verdict* attribute of the event;
   - sets one of the following values to the *Violation level* attribute of the event:
     - *High* - for the following catalogs of protected objects: Security label, Personal data;
     - *Low* - for the following catalogs of protected objects: Law, HR, IT;
     - *Medium* - for all other catalogs of protected objects;
   - sets the *None* value to the *Status* attribute of the person who sends the traffic.
2. *A rule regulating the transfer of confidential data by heads of the company*.
   **If** an employee from the VIP group sends traffic of any type to any recipient any day of the week,
   **Then** the System performs the following actions:
   - sets the *Allowed* value to the *Verdict* attribute of the event;
   - sets the *None* value to the *Violation level* attribute of the event;
   - sets the *VIP* tag to the event.

**Rules of copying**

*A rule that regulates copying confidential data to removable devices*.

**If** an employee copies confidential data related to any category to a removable device any day of the week,
**Then** the System performs the following actions:

- sets one of the following values to the *Violation level* attribute of the event:
  - *High* - for the following catalogs of protected objects: Security label, Personal data;
  - *Low* - for the following catalogs of protected objects: Law, HR, IT;
  - *Medium* - for all other catalogs of protected objects;
- sets the *None* value to the *Status* attribute of the person who sends the traffic.

**Rules of placement**

*A rule that regulates storing confidential data. The rule is added only for the policies with the following protected data: Security Label or Personal Data catalogs of protected objects.*

**If** a person stores protected data in any location,
**Then** the System performs the following actions:

- sets the *High* value to the *Violation level* attribute of the event*;*
- sets the *None* value to the *Status* attribute of the person who owns the data*.*

## 5.8.2.2 Person Control Policy

By default the System has a person control policy with the following attribute values:

| Attribute | Value |
|---|---|
| Policy name | Persons under supervision |

| Attribute | Value |
|---|---|
| Status | Active |
| Period of activity | Not limited |
| Statuses | Under supervision |

#### 5.8.2.2.1 Policy Rules

*The rule that regulates transferring data by persons with Under Supervision status.*

**If** a person with the *Under supervision* status sends traffic of any type to any recipient,
**Then** the System sets:

- the *Allow* value to the *Verdict* attribute of the event;
- the *For consideration* value to the *Tag* attribute of the event.

### 5.8.2.3 Policy that Regulates Transferring Password-Protected Data

By default, the System has a policy that regulates transferring password-protected data.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Password-protected data |
| Status | Active |
| Period of activity | Not limited |
| Protected data | Encrypted files of all formats |

#### 5.8.2.3.1 Policy rules

*The rule that regulates transferring password-protected data outside the company perimeter.*

**If** a person sends traffic of any type outside the company perimeter any day of the week,
**Then** the System performs the following actions:

- sets the *Allowed* value to the *Verdict* attribute of the event;
- sets the *Medium* value to the *Violation level* attribute of the event;
- assigns the *For consideration* tag to the event.

### 5.8.2.4 Policies that Regulate Visiting Web Resources

By default the System has the following data protection policies that control visiting web resources by the company employees:

- Inappropriate Use of Resources
- Disloyal Employees
- Concealing Employees' Actions
- Suspicious Activity

#### 5.8.2.4.1 Inappropriate Use of Resources

By default the System has a policy that controls visiting web resources by the company employees.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Inappropriate use of resources |
| Status | Active |
| Period of activity | Not limited |
| Protected data | Any data |

##### 5.8.2.4.1.1 POLICY RULES

The rule of transfer that regulates sending requests to entertaining resources.

**If** a person sends a request to a web resource included in the "Media", "Blogs", "Entertaining" or "Social networks" groups (for more details, see "Web Resources") any day of the week,
**Then** the System performs the following actions:

- sets the *Allowed* value to the *Verdict* attribute of the event
- sets the *Low* value to the *Violation level* attribute of the event.

#### 5.8.2.4.2 Disloyal Employees

By default,  the System has a preset policy that monitors actions of disloyal employees.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Disloyal employees |
| Status | Active |
| Period of activity | Not limited |
| Protected data | Any data |

#### 5.8.2.4.2.1 POLICY RULES

The rule of transfer that regulates sending requests to resources related to job search.

**If** a person sends a request to a web resource included in the "Job search" group (for more details, see "Web Resources") any day of the week,
**Then** the System performs the following actions:

- sets the *Allowed* value to the *Verdict* attribute of the event;
- sets the *Low* value to the *Violation level* attribute of the event.

### 5.8.2.4.3 Concealing Employees' Actions

By default, the System contains a policy that monitors attempts of employees to conceal their actions or bypass access restrictions.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Concealing employees' actions |
| Status | Active |
| Period of activity | Not limited |
| Protected data | Any data |

#### 5.8.2.4.3.1 POLICY RULES

*The rule of transfer that regulates sending requests to anonymizers.*

**If** a person sends a request to a web resource included in the "Anonymizers" group (for more details, see "List of Resources") any day of the week,
**Then** the System performs the following actions:

- sets the *Allowed* value to the *Verdict* attribute of the event;
- sets the *Low* value to the *Violation level* attribute of the event.

### 5.8.2.4.4 Suspicious Activity

By default, the System has a preset policy that controls suspicious activities of employees on the Internet.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Suspicious activity |
| Status | Active |
| Period of activity | Not limited |

| Attribute | Value |
|---|---|
| Protected data | Any data |

#### 5.8.2.4.4.1 POLICY RULES

*The rule of transfer that regulates sending requests to potentially dangerous resources.*

**If** a person sends a request to a web resource included in the "Potentially dangerous resources", "Sites of aggressive orientation" or "Sites for adults" group (for details, see "Web Resources") any day of the week,
**Then** the System performs the following actions:

- sets the *Allowed* value to the *Verdict* attribute of the event;
- sets the *Low* value to the *Violation level* attribute of the event;
- set the *For consideration* tag to the event.

### 5.8.2.5 Policy that Excludes Mailing Lists from Interception

By default, the System has a preset policy that excludes mailing lists from interception.

The default policy has the following attribute values:

| Attribute | Value |
|---|---|
| Policy type | Data protection policy |
| Policy name | Exclude from interception |
| Status | Disabled |
| Period of activity | Not limited |
| Protected data | Any data |

#### 5.8.2.5.1 Policy rules

*Rule that regulates sending data by persons from the "Exclude from Interception" perimeter*

**If** a person who belongs to the *Exclude from interception* perimeter (see "Perimeters") sends traffic to any recipient any day of the week,
**Then** the System deletes the event.

## 5.8.3 Creating Data Protection Policy

**Purpose:**
Create a policy that determines the System reaction to actions with data.

**Solution:**

1. Go to the **Policies** section.
2. In the left part of the workspace, click **Add policy** and, in the drop-down list, select **Data Protection Policy**.

A new policy will be added to the **Data protection policies** group, and, on the right side of the workspace, a policy adding form will be displayed.

3. To add protected data to the policy, click **Select**.

> **Note:**
>
> If you do not select any protected data, then the policy will apply to any data.

4. In the window that appears, set the check boxes next to desired values. Protected data may include protected objects, their catalogs, and file formats.

> **Warning!**
>
> If protected data of several types are specified for the policy, then for triggering the policy rules (see "Rules and their Viewing Form"), it is necessary that the intercepted event should contain violations of each type.
>
> For example, a catalog of protected objects and several file formats are specified as protected data for the policy. In this case, for the policy to be triggered it is necessary that intercepted data should contain at least one protected object from the specified catalog and at least one file of the specified format.

5. After you have selected protected data, click **Save**.
6. In the right part of the workspace, fill the required fields (see “Policies and their Viewing Form"), and click **Save**.

> **Important!**
>
> When you fill the **Validity period** attribute, consider the possible time zone difference between branches of your organization. The time of interception for the event is the local time on the server which intercepts data. If the local time of interception does not fall within the specified range, the policy does not apply to the event.

***Example 1:***
If you want the System to respond to actions performed with data which form the *State secret* protected object:
add a data protection policy and specify the *State secret* protected object as protected data.

***Example 2:***
If you want the System to respond to sending any data to a specified resource:

add a data protection policy, specify the type of resource and the violation level, and do not add any protected data.

**Additional information:**

- Policy editing is described in "Editing Policy".
- To delete the policy, in the upper right corner of the policy tile click, ✖ and, in the window that opens, confirm the deletion.

## 5.8.4 Creating Data Protection Policy on Agents

**Purpose:**

Create a policy that determines the System reaction to actions with data and applies directly on Device Monitor agents. This policy allows you to operatively prevent data leaks on computers where Device Monitor agents are installed.

**Solution:**

1. Go to the **Policies** section.
2. In the left part of the workspace click **Add policy** and, in the drop-down list, select **Data Protection Policy on Agents**.
   A new policy will be added to the **Data protection policies on agents** group, and, in the right part of the workspace, a policy adding form will be displayed.
3. To add protected data to the policy, click **Select**.

> **Note:**
>
> If you do not select any protected data, then the policy will apply to any data.

4. In the **Choose protected data** window that appears, set check boxes next to desired values. Protected data may include:
   - **Protected objects**
     You can select protected objects that contain only categories and text objects.
   - **Catalogs of protected objects**
     From selected catalogs, the policy will use only those protected objects that are based on categories and text objects.
   - **File formats**
     For file formats, you can also set an additional restriction on the file size and specify if the policy should apply to all files or only to files with an extraction error. If **With extraction error** option is selected, then the policy is triggered only if an error has occurred while extracting data from files of specified formats (for example, if the file is encrypted or the System failed to determine the file format).

> **Important!**
>
> If protected data of several types are specified for the policy, then for triggering the policy rules (see "Rules and their Viewing Form"), it is required that the intercepted object should contain violations of each type.
>
> For example, a catalog of protected objects and several file formats are specified as protected data for a policy. In this case, for the policy to be triggered, it is necessary that intercepted data should contain at least one protected object from the specified catalog and at least one specified file format.

5. After you have selected protected data, click **Save**.

6. In the right part of the workspace, fill the required fields (see “Policies and their Viewing Form"), and click **Save**.

> **Important!**
>
> When you fill the **Validity period** attribute, consider the possible time zone difference between branches of your organization. The time of interception for the event is the local time on Device Monitor agent. If the local time of interception does not fall within the specified range, the policy does not apply to the event.

***Example:***

If you want the System to respond to actions with data in ZIPformat on workstations, add a data protection policy on agents and specify *ZIP Archive* as protected data. The created policy will apply if the events contain at least one attachment inZIP format.

**Additional information:**

- Policy editing is described in "Editing Policy".
- To delete the policy, in the upper right corner of the policy tile, click,

  and, in the window that opens, confirm the deletion.

## 5.8.5 Creating Person Control Policy

**Purpose:**
Create a policy that determines the System reaction to actions of certain persons. The policy applies only to actions of traffic senders.

**Solution:**

1. Go to the **Policies** section.
2. In the left part of the workspace, click **Add policy** and, in the drop-down list, select **Person Control Policy**.
3. In the window that appears, set the check boxes next to the items that you want to add, and then click **Save**. Research objects may be:
   - individual persons (employees or computers);
   - a group of persons and computers;
   - persons and computers with the same status.

> **Note:**
>
> If elements of different types are selected (for example, persons and statuses), then the policy is triggered when at least one object of each type is detected.

4. A new policy is added to the **Person Control Policies** group, and, in the right part of the workspace, a policy viewing form is displayed.
5. In the policy form, fill in the required fields (see "Policies and their Viewing Form") and click **Save**.

> **Important!**
>
> When you fill the **Validity period** attribute, consider the possible time zone difference between branches of your organization. The time of interception for the event is the local time on the server which intercepts data. If the local time of interception does not fall within the specified range, the policy does not apply to the event.

You can also add person control policies directly from **Persons** (see "Persons") and **Statuses** (see "Statuses") sections.

**To add a policy for a group of persons or computers**:

1. Go to the **Persons** section.
2. Select the desired group in the list.
3. On the toolbar in the left part of the workspace, click .

**To add a policy for selected persons or computers**:

1. Go to the **Persons** section.
2. Select the desired person or computer. To select multiple elements, use Shift or Ctrl keys.
3. On the toolbar in the right part of the workspace, click and, in the drop-down list, select **Create policy**.

**To add a policy for a selected status:**

1. Go to **Lists**->**Statuses** section.
2. Select the desired status from the list.
3. On the toolbar, click .

**Example:**

If you want to control the person *Smith* (assumes that this person has already been created in **Persons** section) so that intercepted objects with *High* violation level, which are sent by Smith, would be assigned the verdict *Allow*, Smith would be assigned the *Under supervision* status and the user with the mailbox *example@company.com* would be notified about the incident:

go to the **Policies** section and create a person control policy named *Smith*. Then create a rule for the policy *Smith* and set the following values to the attributes:

- attribute **Intercept with the violation level** - *High* value;

- attribute **Send notification** - *example@company.com* value (for details, see “Sending Notifications on Responded Rule");
- attribute **Assign verdict** - *Allow* value;
- attribute **Set status** - *Under supervision* value.

**Additional information:**

- Rules editing is described in "Editing Policy".
- To delete a policy, click × button located in the upper right corner of the tile and, in the window that opens, confirm the deletion.

## 5.8.6 Editing Policy

**Purpose:**
Change attributes of the created policy.

**Solution:**

1. Go to the **Policies** section.
2. In the left part of the workspace, left-click the target policy.
3. In the right part of the workspace, fill the required fields (see “Policies and their Viewing Form").
4. To change the list of protected data or controlled persons, in the **Protected data** block (for data protection policies) or **Controlled persons** (for person control policies), click **Select** and edit the list.
5. When you make all required changes, click **Save** in the policy edit form.

## 5.8.7 Creating Rules

**Reference information:**

For each **data protection policy**, you can configure one or more rules:

- Data Transfer
- Data Copy
- Data Placement
- Clipboard

For each **data protection policy on agents**, you can configure one or more rules:

- Data Transfer
- Data Copy

If the policy is triggered on the interception object, then, depending on the number of triggered rules, the following variants are possible:

- If one rule is triggered, the System performs actions specified in this rule.
- If several rules are triggered and

  - their actions contradict each other, then the System chooses the priority action and performs it (on the order of selecting priorities, see “General Information on Policies");
  - their actions do not contradict each other, then the System performs all specified actions.

- If no rule is triggered or rules are not specified, then the System performs the actions specified in the default rule (see “Determining System Default Response").

For each **person control policy**, you can configure rules for intercepting events with the specified violation level. You can also link the rule with existing data protection policies and data protection policies on agents.

**Note:**

If the interception object triggers multiple policies, and each policy has its own rules, then the System chooses the action with the highest priority and performs it (on the order of selecting priorities, see "General Information on Policies"). Actions that do not contradict other actions are fully performed.

**Purpose:**
Determine what actions with protected data cause reaction of the System and how the System should respond to these actions.

**Solution:**

1. Go to the **Policies** section.
2. Add a rule in one of the following ways:
   - Left-click the target data protection policy or data protection policy on agents, and in the left part of the policy tile, select the desired tab (**transfer**, **copying**, **placement** or **clipboard**), and click **Add rule**.
   - Left-click the target policy, then, on the right part of the workspace, click **Add rule**, and, from the drop-down list, select the desired rule.
3. Configure the rule by using a form on the right part of the workspace (see “Rules and their Viewing Form").
4. In the **Actions when the rule is triggered** block, on the rule viewing form, specify which actions the System should perform in the rule is triggered.

***Example:***

When somebody transfers files included in the *Strictly confidential* protected object on Saturdays and Sundays, the System should assign the *Sending confidential data on weekends* tag to the event and set the *Medium* violation level:
In this case, perform the following actions:

1. create the *Sending confidential data on weekends* tag (see "Managing Tags");
2. create a data protection policy for the *Strictly confidential* protected object (see "Creating Data Protection Policy");
3. create a transfer rule of transferring and assign the *Saturday* and *Sunday* values to the **Days of rule activity** attribute*;*
4. in the **Actions when the rule is triggered** block, assign the following values to attributes:
   - attribute **Set violation level** - *Medium* value;

- attribute **Tags** - *Sending confidential data on weekends* value.

**Additional information:**

- Editing rules is described in "Editing Rules".
- To delete the rule, click ✕ button in the upper right corner of the tile and, in the window that opens, confirm the deletion.

## 5.8.8 Editing Rules

**Purpose:**
Edit a previously created rule.

**Solution:**

1. Go to the **Policies** section.
2. On the left side of the workspace, left-click the target policy.
3. In a policy tile, select a target group of rules:
   - **Transfer**, **Copy**, **Placement** or **Clipboard** tabs - for a data protection policy;
   - **Transfer** or **Copy** tabs - for a data protection policy on agent;
   - **Rules** tab - for a person control policy.
4. The policy tile will display the list of policy rules of the selected group. Left-click the desired rule in the list.
5. On the right part of the workspace, the rule editing form will open. Edit the required fields (see "Rules and their Viewing Form") and click **Save**.

## 5.8.9 Determining System Response to Policy Violations

**Reference information:**
For each policy, you can specify actions, the System performs in case of rule violation (on how to specify the actions, see "Creating Rule").
Available actions are determined by the rule type:

| **Action** | **Data protection policies** | | | | **Data protection policies on agents** | | **Person control policies** |
|---|---|---|---|---|---|---|---|
| | **Transfer rule** | **Copy rule** | **Placement rule** | **Clipboard rule** | **Transfer rule** | **Copy rule** | **Person control rule** |
| Send notification | Available | Available | Available | Available | Available | Available | Available |
| Notify sender | Available for the "Email" event type only | Not available | Not available | Not available | Available for the "Email" event type only | Not available | Not available |
| Assign verdict to event | Available | Not available | Not available | Not available | Available | Available | Available |

| Action | Data protection policies | | | | Data protection policies on agents | | Person control policies |
|---|---|---|---|---|---|---|---|
| Assign violation level to event | Available | Available | Available | Available | Available | Available | Available |
| Assign tags to event | Available | Available | Available | Available | Available | Available | Available |
| Assign status to senders | Available | Available | Available | Available | Available | Available | Available |
| Delete event | Available | Available | Available | Available | Not available | Not available | Available |

A detailed description of actions:

| Action | Description |
|---|---|
| Send notification | Specified Console users will be notified via email. The list may contain users or their email addresses. |
| Notify sender | The sender of the intercepted email message will receive a notification |
| Assign verdict to event | The event is assigned a verdict which is a preliminary System decision concerning possible violation of the security policy. Possible values:<br>• **Allow** - the object is not a potential violation and can be delivered to senders.<br>• **Block** - the object is a potential violation. In the "Block" mode, the object delivery is blocked.<br>• **Quarantine** (for data protection policies on agents, this verdict is unavailable) - the user should make a decision whether the object is a violation or not. In the "Block" mode, the object delivery is postponed until the user decision is made. Depending on the user decision, the verdict value will change either to **Allowed** (in this case, the message is delivered) or to **Blocked** (for details, see "Making Decision on Object"). Dispatching messages is available only for SMTP letters when the System operates in the inline mode (for details see the document "*Infowatch Traffic Monitor. Installation and Configuration Guid*e". |
| Assign violation level to event | A violation level will be assigned to the event. Possible values: **High**, **Medium**, **Low**, **No violation**. |
| Assign tags to event | The event will be assigned tags, for example, **Under supervision**. For details, see "Tags". |
| Assign status to senders | The security policy violators will be assigned a specified status, for example, **Under supervision**. For details, see "Statuses". |
| Delete event | The event will not be saved to a database and actions specified in the rule will not be performed either. |

**See also:**

- "Creating Rule" - on how to create rules
- "Editing Rules"- on how to modify earlier created rules

## 5.8.10 Determining System Default Response

**Reference information:**
If after applying the policy, there are sub-events with no matching rules, the System performs default actions (on dividing events into sub-events, see "General Information on Policies"). Default actions are specified by the user.

> **Note:**
>
> If default actions are not specified and none of the rules is triggered on the interception object, the policy is not triggered on this interception object either.

**Purpose:**

Determine how the System should respond if the event contains a sub-event to which neither of the policy rules matches.

> **Note:**
>
> Default actions can only be specified for data protection policies and data protection policies on agents.

**Solution:**

1. Go to the **Policies** section.
2. On the left side of the workspace, left-click the target policy.
3. In the policy tile, select a target tab (**transfer**, **copying**, **placement** or **clipboard**) and left-click the lower part of the tile:




4. In the right part of the workspace, specify required actions in the single **Actions** block (see "Rules and their Viewing Form") and click **Save**.

**Additional information:**

For web message and webmail event types, a default rule can be false triggered. Such a situation may arise when:

The System contains a rule that regulates data transfer from person A to person B. If person A sends data to person B via website, the System creates an event which is divided into two sub-events:

| Sender | Recipient | Protocol |
|---|---|---|
| Person A | Person B | HTTP |
| Person B | Website domain | HTTP |

Since the route **Person A**->**Website domain** is not specified in the policy rules, default actions are executed.

To avoid false triggering of the default rule for web message and webmail event types, do either of the following:

- in the transfer rule attributes, add the website domain or a list of websites that can be used for data transfer;
- do not specify default actions.

***Example:***

You need the System to assign the *Under supervision* status to the card of the person who copies data if:

- the copied data form a *State secret* protected object, and
- no copy rules are triggered.

In this case, perform the following actions:

1. create a data protection policy for the *State secret* protected object (see "Creating Data Protection Policy");
2. start configuring default policy actions;
3. in the only **Actions** block, set the *Under supervision* value to the **Set status** attribute.

## 5.8.11 Filtering the List of Policies

**Purpose:**
Filter the list of policies in case of a large number of policies.

**Solution:**

1. Go to the **Policies** section.
2. In the left part of the workspace, click **Filter**.
3. In the **Filter settings** area, specify filtering criteria in one of the fields or in both of them:
    - **Filter by policy name** - start typing and select the name of the needed policy (repeat to select several policies)
    - **Filter by objects of research** - start typing and select the name of needed object (repeat to select several objects)
      For data protection policies and data protection policies on agents, you can specify the following objects of research:
        - catalog of protected objects;
        - protected object;
        - file format.

      For person control policies, you can specify the following objects of research:
        - person;
        - group of persons;
        - status.
4. Click **Apply**.

## 5.8.12 Sending Notifications on Responded Rule

**Purpose:**
Configure sending automatic notification about responded rule to some users.

> **Warning!**
>
> To send notifications, you can only use e-mail addresses. When you choose existing contacts, select user entries with specified e-mail address only.

**Solution:**

1. Go to the **Policies** section.
2. On the left side of the workspace, left-click the target policy.
3. In a policy tile, select the desired tab (**transfer**, **copying**, **placement** or **clipboard**) and left-click the target rule in the rule list.
4. The policy tile will display the list of rules of the selected group. By clicking the left mouse button select the desired rule in the list.
5. In the right part of the workspace, in the **Send notification** field, specify a contact of the Management Console user. To do this, start typing the contact details and select the desired entry from the drop-down list.

> **Note:**
>
> If, after the rule is created, the user or user's e-mail are deleted from the System (on managing user accounts, see *"Administration Guide"*, "Users" section), notifications will not be sent to this user.

**Example:**

If you need that in case of copying confidential data (protected object -*Trade_Secret*) to a removable device, the System would:

- assign the *Allow* verdict to the interception object
- assign the *Under supervision* status to the person
- notify the user with *example@company.com* mailbox about the incident

Create a data protection policy for the *Trade_Secret* protected object. Then create a rule of copying for this policy and assign the following values to the attributes:

- **Days of rule activity** attribute - *Saturday* and *Sunday* value
- **Devices** attribute - *Removable devices* or *Printers or removable devices* value
- **Send notification** attribute - *example@company.com* value
- **Assign verdict** attribute - *Allow* value

## 5.8.13 On Data Protection Policy on Agents

**Why do you need data protection policies?**

Policies of this type apply first and directly on DM agents. They are used to control activity on workstations and prevent leaks of confidential data.

The policy controls such actions as data transfer (Internet activity, Email, webmail) and data copy (FTP, external storage).

**How the policy works:**

1. The security officer creates and configures the policy. The created policy is then deployed on workstations.
2. A person performs illegitimate actions (e.g., sends webmail with confidential data).
3. DM agent on the workstation analyses the transferred data.
4. If the policy is triggered, the DM agent performs actions specified in the policy (e.g. blocks sending if *Block* verdict is specified in the rule; in this case, the message is not sent).
5. TM gets the event and analyses it.
6. The security officer sees the event and its analysis results in the Console and can take necessary actions.

**What do you need to create a policy?**

- Add policy rules. The following rules can be added: transfer rule, copy rule.
- Choose protected data. If no protected data is selected, the policy is applied to actions with any data.
- Specify a period during which the policy will apply.

## 5.8.14 On Data Protection Policy

**Why do you need data protection policies?**

Policies of this type apply in TM after data protection policies on agents. They allow you to monitor the following channels of data leaks:

- Messengers, SMS
- Photo, screenshots, printing
- Crawler
- Clipboard

**How the policy works:**

1. The security officer creates and configures the policy.
2. A person performs illegitimate actions (e.g., sends SMS with confidential data).
3. TM analyses received data.
4. If the policy is triggered (policy rules are violated), an event is created. The message is sent to the recipient (its shadow copy is created in TM).
5. The security officer can see the event in the console.

6. The security officer analyses received information and can take necessary actions.

**What do you need to create a policy?**

- Add policy rules. The following rules can be added: transfer rule, copy rule, placement rule, and clipboard rule (see "Rules and their Viewing Form").
- Choose protected data. If no protected data is selected, the policy is applied to actions with any data.
- Specify a period during which the policy will apply.

## 5.8.15 On Person Control Policy

**Why do you need data protection policies?**

Policies of this type can be used if the security officer needs to monitor actions of a particular person.

**How the policy works:**

1. The security officer configures a person control policy and specifies the controlled person.
2. If actions of this person trigger the policy rules, information about these actions is sent to TM.
3. TM analyses the received information.
4. The security officer sees the event with analysis results and takes necessary actions.

**What do you need to create a policy?**

- Add person control rule (see "Person Control Rule").
- Specify controlled objects (they can be persons, person groups, or statuses).

> **Note:**
> The policy applies to event initiators only. Traffic recipients are not controlled by this policy.

# 5.9 Managing Reports

**What for do you need reports?**

In contrast to the brief statistical information provided in the section "Dashboard", reports allow you to perform a more flexible configuration of statistical parameters to demonstrate the results of the System functioning for a specified period of time.

**Includes the following actions:**

| Action | Description |
|---|---|

| Action | Description |
|---|---|
| Creating a folder with reports | Create a folder that contains reports |
| Creating a report | Generating reports with statistical information |
| Managing widgets | Specifying the search parameters and how to graphically display data in a report |
| Managing ready reports | Viewing report execution history which provides the ability to remove unneeded versions of the report, or to save report data to a file |

**See also:**

- "Reports Section" - on the section where managing reports is performed

## 5.9.1 Creating a Folder with Reports

**Purpose:**
Create a folder for grouping reports with a common theme.

**Solution:**

1. Go to the **Reports** section.
2. On the toolbar in the left part of the workspace, click  and, in the drop-down list, select **Create folder**.
3. In the window that appears, specify the folder name and access parameters (for more information, see "Report Folder Creation Form").
4. Click **Save folder**.

You can also copy a previously created folder and its reports. To do this:

1. Select the folder in the list using the left mouse button
2. In the window of folder properties that appears, click **Copy**.
3. The folder copy will be added to the folder structure at the same level as the folder being copied.

You can change the location of the folder using drag and drop. To do this, select the folder in the list, press the left mouse button and move the folder to the desired location holding the left mouse button pressed. Then release the mouse button.

**Additional information:**

Editing and deleting reports are performed by standard means:

- Editing folder is performed by standard means (see "Editing Element").
- Deleting a folder is performed by standard means (see "Deleting Element").

## 5.9.2 Creating a Report

**Purpose:**
Create a report that contains statistical data on interception objects.

**Solution:**

1. Go to the **Reports** section.
2. In the left part of the workspace, select a folder in which you want to create a report, or create a new folder (for details, see "Creating a folder with reports").
3. On the toolbar, click  and in the drop-down list select **Create report**.
4. In the window that appears, specify required settings (for more information, see "Report Creation Window").
5. Click **Add widget**.
6. In the **Widget Creation** window that opens, specify the widget parameters (for details, see “Managing widgets of reports").
7. Click:
    a. **Save** - to save the report.
    b. **Save and execute** - to save and execute the report.

You can also copy a previously created report. To do this:

1. Select a report in the list using the left mouse button.
2. On the toolbar in the left part of the workspace, click  **Copy** (or click  in the right part of the workspace and, in the drop-down list, select **Copy**).
3. The copy will be added to the report structure at the same level as the report being copied.

You can change the location of the report using drag-and-drop. To do this, select the required report in the list, press the left mouse button and move the report to the desired location holding the left mouse button pressed. Then release the mouse button.

**Warning!**

When moving a report to a folder, access parameters specified for the folder will be applied to the report being moved.

**Additional information:**

Editing and deleting reports are performed by standard means:

- Editing a report is performed by standard means (see "Editing Element"). Apart from  button located on the toolbar, you can also use the **Edit** in the left part of the workspace;
- Deleting a report is performed by standard means (see "Deleting Element"). Apart from  button located on the toolbar, you can delete the report by clicking  in the right part of the workspace and selecting **Delete**.

## 5.9.3 Managing Widgets of Reports

Working with widgets includes the following actions:

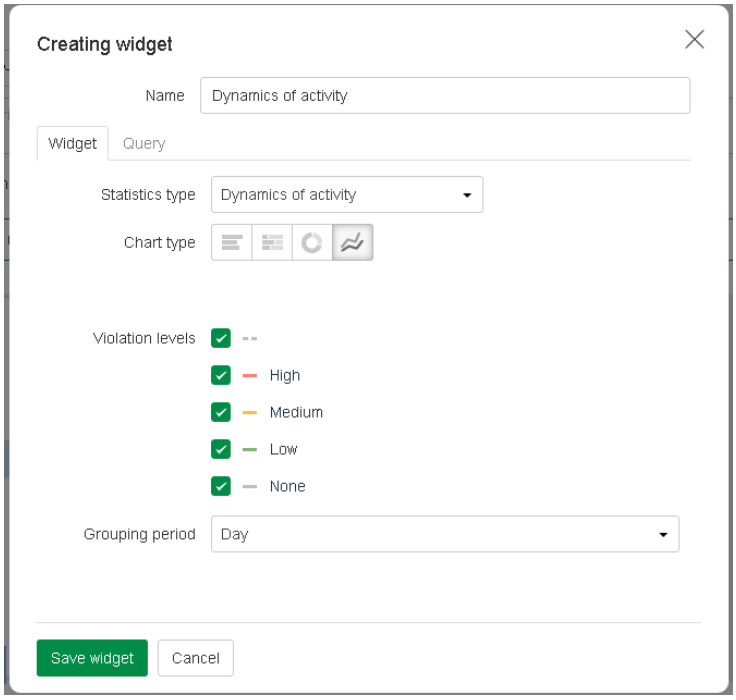
| Action | Description |
|---|---|
| Creating and Configuring Widget | To specify how to display statistical data and which filtering criteria to use, you need to create and configure the widget |
| Editing Widget | To edit the widget, switch to the report edit mode, in the upper-right corner of the desired widget click ▾ and in the drop-down list select **Edit**. |
| Duplicating Widget | To duplicate the widget, switch to the report edit mode, in the upper-right corner of the desired widget click ▾ and in the drop-down list select **Duplicate**. In the report list in the left side of the workspace, select the report to which you want to duplicate a widget. |
| Deleting widget | To delete the widget, switch to the report edit mode, in the upper-right corner of the desired widget click ▾ and in the drop-down list select **Delete**. |

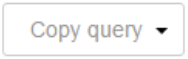
### 5.9.3.1 Creating and Configuring Widget

**Purpose:**
Create a widget for the selected report and configure its settings.

**Solution:**

1. Go to the **Reports** section.
2. Select the desired report and switch to the edit mode, or create a new report (for more details, see "Creating a report").
3. In the right part of the workspace, click **Add widget**. The **Creating Widget** window will open.




4. Fill in the required fields:
    a. In the **Name** field, enter the name of the widget.
    b. On the **Widget** tab, choose the type of statistics. Other settings (a chart type, the number of records, the grouping period, etc.) are available depending on the chosen type of statistics (for more details on the types of statistics, see "Widgets").
    c. On the **Query** tab, specify the parameters based on which events will be filtered (for more information about available settings, see "Queries"). To copy parameters from a query that was created in the Events section, click 

and in the drop-down list select the desired query.
5. Click **Save Widget**.

## 5.9.4 Managing Ready Reports

**Includes the following actions:**

- viewing the report execution history:
- view a selected version of the report;
- deleting selected records;
- saving the report to a file.

**To view report execution data:**

1. Go to the **Reports** section.

2. In the right part of the workspace, click  and, in the drop-down list, select **Report execution history**. In the dialog box that appears, you can view data about the report execution (for details see "Report Execution History").
3. To add a comment to a selected report version, double-click the **Comment** field opposite the selected version and enter the comment.

**To view and edit the selected versions of the report:**

1. To open the report for a specific date, left-click on the desired date of execution. A list of widgets, which display results of the report execution for the selected date, will open.
2. If you want to go to the "Events" section and view the events represented in the widget, in the upper-right corner of the selected widget, click  and, from the drop-down list, select **Go to events**.

**To delete selected versions of the report:**

1. Select the report versions that you want to delete. To do this, select the check boxes in required rows. To select all rows at once, select the check box in the header field.
2. Click **Delete**.

**To save the report:**

1. Select the report versions which you want to save to a file. To do this, select the check boxes in required rows. To select all rows at once, select the check box in the header field.
2. Click **Export** and, in the drop-down list, choose the save format. You can save the report in one of the following formats: Excel 2007, Excel 2003, PDF, or HTML. File in the specified format will be saved to your computer.

> **Note:**
>
> To save the current version of the report, in the upper right corner of the workspace, click  and, in the drop-down list, under the **Report export** caption, choose the format in which you want to save the file. File in the specified format will be saved to your computer.

# 6 USING DEVICE MONITOR MANAGEMENT CONSOLE

The Management Console (DM) is designed to address the following tasks:

- InfoWatch Device Monitor access and management;
- configuring computers monitoring system;
- computers access control.

To use Management Console (DM) you have to be familiar with Microsoft Windows OS basics.
For more information on Management Console (DM) workflow, see:

- Management Console (DM) Overview. InfoWatch Device Monitor general actions (startup, interface configuration).
- Managing Console (DM) Accounts. How to perform InfoWatch Device Monitor administration tasks: managing InfoWatch Device Monitor Management Console (DM) accounts, working with log, etc.
- General System Settings. Defining global settings which are common for all rules (DM) and policies (DM).
- Managing Security Schema. How to use security schema and configure security settings.
- Viewing Events. Viewing information on managed devices and channels of data transfer on the managed computers.
- Clients Remote Installation, Updating and Uninstallation. InfoWatch Device Monitor Client installation and configuring via Management console (DM).
- Additional Features. Secondary functions enhancing InfoWatch Device Monitor Management Console (DM) user experience: records filtering, grouping and sorting, Management Console (DM) shortcuts.

## 6.1 Management Console (DM) Overview

Management Console (DM) basics are available in the following subsections:

- Authorization and Connecting to InfoWatch Device Monitor Server;
- Management Console (DM) Main Screen;
- Management Console (DM) Sections.

### 6.1.1 Authorization and Connecting to InfoWatch Device Monitor Server

When working with DM Management Console, you need a permanent connection with Device Monitor Server. For this, you need to go through **authorization**, during which user permissions to start the Management Console are defined.

When you first start DM Management Console, the System uses the data (username and password) of the account with the **Superuser** role (the Superuser role is created during installation of the server, for details, see "*Traffic Monitor. Installation Guide*", "Server End Installation Procedure" article").

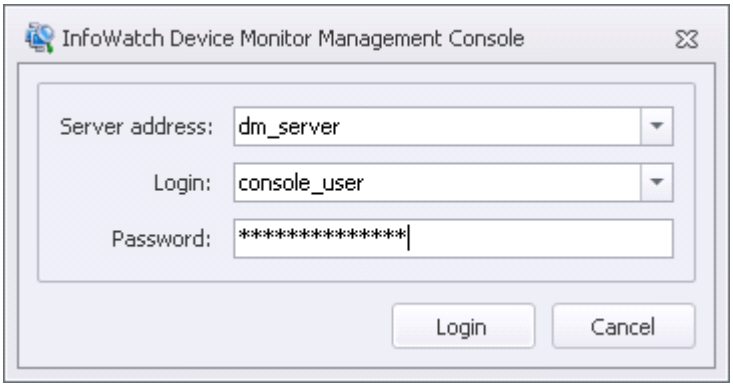
To start working with DM Management Console:

1. Start the Management Console (DM). For this, in the **Start** menu, choose **Programs** > **InfoWatch** > **Device Monitor** > **Management Console**.
2. Perform the authorization procedure as described below.

For successful authorization, the following conditions should be met:

- the database contains a user account with specified parameters;
- a role is assigned to the user account;
- the user account is active (not active);
- the user account is not blocked.

Enter the data for authorization in the connection dialog box.



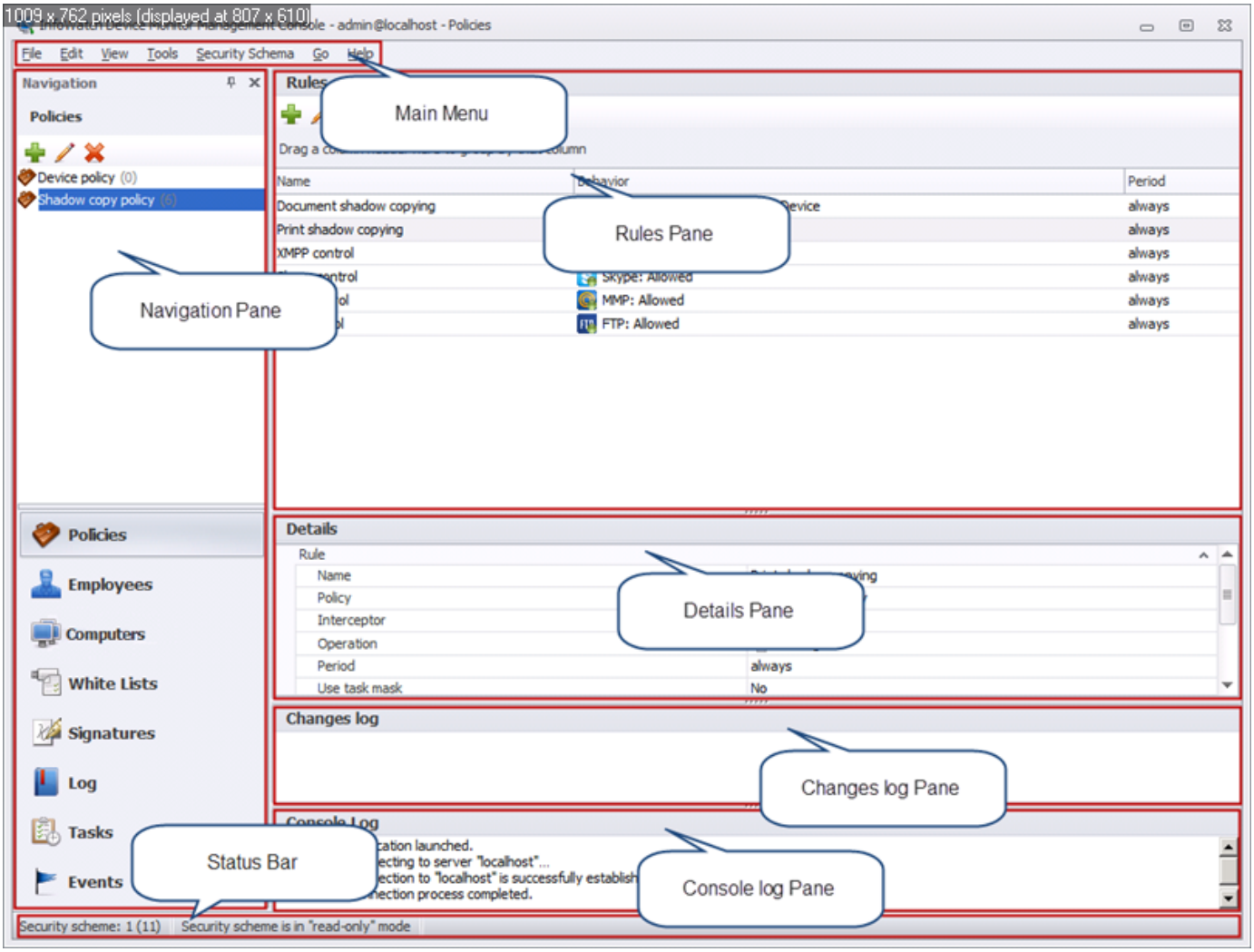

| Parameter | Description |
|---|---|
| Server address | FQDN of the server, the Management Console is connecting to.<br>Th default port for communication between the server and Management Console is 15003. If this port has been changed, enter the server address as follows: `dm_server:port` |
| Login | Name of the user account |
| Password | User password.<br>Check the keyboard layout before entering your credentials. |

At the first launch of DM Management Console, logon dialog fields are empty. Later, **Server address** and **Login** fields will contain the credentials entered during the previous authorization attempt. You must fill the **Password** field each time you are trying to log in.
You can track the status of connection with the server via system messages on the **Console log** panel (see "DM Management Console Main Screen").

If you need, you can open the authorization box and change the entered parameters to connect to the same or a different server using the same or a different account. To do this, in the Main Menu select **File** > **Connect**, then connect to the Server as described above.

## 6.1.2 Management Console (DM) Main Screen

After successful authorization in Management Console (DM), the main window is displayed on the screen:




For information on main screen customization see "Configuring Management Console (DM) Main Screen Elements".

The main screen contains elements required for working with the Management Console (DM):

- The **main menu** contains commands that give you access to all Management Console (DM) essential features.
- The **navigation** pane allows you to switch between different section of the Management Console (DM) and manage elements of the selected section.
- The **main screen workspace** allows you to view elements of the selected group and perform operations with these elements.
- The **toolbars** contain buttons for quick access to some functions of the Console (DM). The toolbars are located on the Navigation page (for elements of the selected section) and in the workspace (for the selected element).
- The **Details** pane displayed extended information about properties of the selected element.
- The **Changes log** pane displays all changes made by the current user and not saved in the security scheme.

- The **Console log** pane displays system messages.

If you are working with a single object, most commands are available from the context menu. To open the context menu, right-click the object.

General information on the current status is displayed on the status bar at the bottom of the main screen. In particular, the following information is displayed:

- number of the security scheme current version;
- mode of the security scheme;
- versions of control elements - in the **Computer groups** section.

#### 6.1.2.1 Configuring Management Console (DM) Main Screen Elements

You can customize the appearance and location of Navigation, Details, Console log panes.

| Action | Steps |
|---|---|
| Hide pane | Click View in the Main Menu and click on the bar title you want to hide. To open the pane again, repeat this step.<br>or<br>Click in the upper right corner of the pane. |
| Enable/disable pane automatic collapse | Click in the upper right corner of the pane. |
| Change pane location | Click on the pane name and drag the pane to a new location. Release the button to place the pane. |
| Return the pane to its original position | Double-click the title bar |
| Change panel size | Move the pointer to the edge of the panel. When the pointer turns into a double arrow, click and hold to drag the margin into the right direction. Release the button when the size is right. |

b panel displays individual element properties. You can collapse or expand property table for any item.

**To customize Details panel**,
double-click properties table title bar or use double-arrow button in the right part of the properties table header.

**To hide/display toolbar or Status panel**,
right-click on toolbar or status panel. In context menu, flag the elements that will be displayed (all the elements are flagged by default).

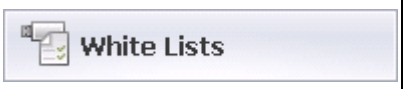
### 6.1.3 Management Console (DM) Sections

Management Console (DM) includes the following sections: **Policies, Employees, Computers, White Lists, Signatures, Log, Tasks** and **Events**. Each section corresponds to similar Navigation panel area. To go to the section, do any of the following:

- in the Main Menu select **Go**. In drop-down menu, click on the section title;

- use Navigation panel buttons.

Sections **Policies, Employees, Computers, White Lists** and **Signatures** designed for managing the security schema, **Log** section for monitoring security schema management, **Tasks** - for managing Client installation and uninstallation tasks, **Events** - for viewing the events on managed computers. Detailed description of section functions is available in the following table:

| Section icon and name | Section assignment |
|---|---|
|  | Security policy management: creating security policies, setting policy rules |
|  | Employee management: creating employee groups, adding employees to groups |
|  | Computers management: creating computer groups, adding managed computers to groups |
|  | Managing white lists of fully accessed devices |
|  | View and manage signature categories that assign File Monitor rules to certain file formats. |
|  | Application protocol and creating application lists to permit or forbid applications start. |
|  | Security schema management activity log (logging administrating responsibility zones and configuring security schema) |
|  | InfoWatch Device Monitor Clients centralized installation, updating, and uninstallation on computers |
|  | Viewing information on employee activities at managed computers using controlled means |

# 6.2 Managing Console (DM) Accounts

The system registers a Management Console (DM) account for each security schema operator. Account credentials are used for user authorization and access to certain operations.
Management Console (DM) authorized users' rights are defined by their roles. Each role features a set of responsibility zone privileges. User cannot perform actions outside the assigned**role**.
Management Console (DM) uses the following roles to manage user privileges:

- **Security officer** - Console (DM) end-user managing security schema and Server settings.
- **Local administrator** - Console (DM) administrator managing other accounts.
- **Super user** - built-in role which have all Console (DM) privileges. Superuser role is not designed for routine System operations: it is recommended to use it only for primary Console (DM) configuring, Local administrator account creating and then - just in emergency cases.

The following table lists roles privileges.

| Action | Super user | Local administrator | Security officer |
|---|---|---|---|
| Management Console (DM) first launch and configuration | + | | |
| Work in emergency situations | + | | |
| Unlocking security schema | + | | |
| Viewing audit log | + | | + |
| Export audit log records | + | | + |
| Deleting audit log entries | + | | |
| View Management Console accounts information | + | + | + |
| Add, edit, delete Management Console (DM) accounts | + | + | |
| Assign/delete Management Console account roles | + | + | |
| Block/unblock Management Console accounts | + | + | |
| Viewing Device Monitor Server settings. Configuring connection to Traffic Monitor server | + | | + |
| View security schema versions | + | | + |
| Edit security schema | + | | + |
| Import/export security policies and rules | + | | + |
| Viewing events | + | | + |
| Clients Remote Installation, Updating and Uninstallation | + | | + |
| Temporary Employee Access to Network | + | | + |
| Temporary Employee Access to Devices | + | | + |

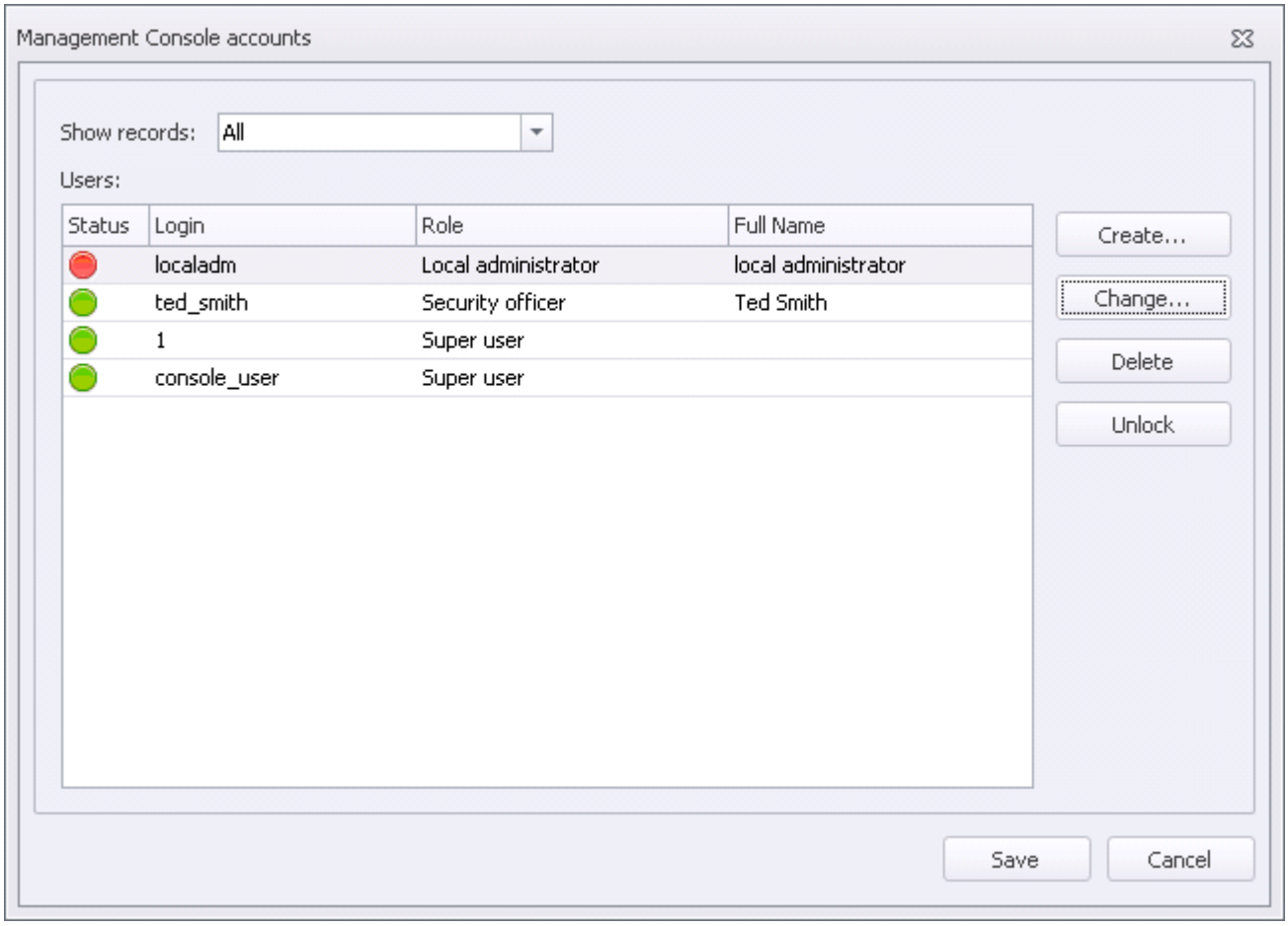
For more information on Management Console (DM) accounts management, see:

- Viewing Management Console (DM) Accounts Details;
- Adding New Management Console (DM) Account;
- Locking or Unlocking Management Console (DM) Account;
- Editing Management Console (DM) Account;
- Deleting Management Console (DM) Account;
- Management Console (DM) Security Schema Operation Activity Log.

## 6.2.1 Viewing Management Console (DM) Accounts Details

To view Management Console accounts information:

1. In the Main Menu click **Tools > Management Console accounts**. This opens **Management Console Accounts** dialog box.




2. There is Show records field at the top of the dialog box. Select displayed accounts type in from the drop-down list:
   - **All**. All accounts regardless of their status.
   - **Active**. List of all active accounts.
   - **Blocked**. List of accounts, which were blocked but can be unblocked (see "Locking or Unlocking Management Console (DM) Account").
   - **Deleted**. List of accounts which were deleted and cannot be restored. However the System saves an information about actions those users performed.

**Note:**

Management Console (DM) can be only operated by the accounts in **Active** list. Deleted accounts

can only be viewed.

Management Console (DM) account information is displayed as tabular list. Each row contains a single account. Columns contain the following account attributes values:

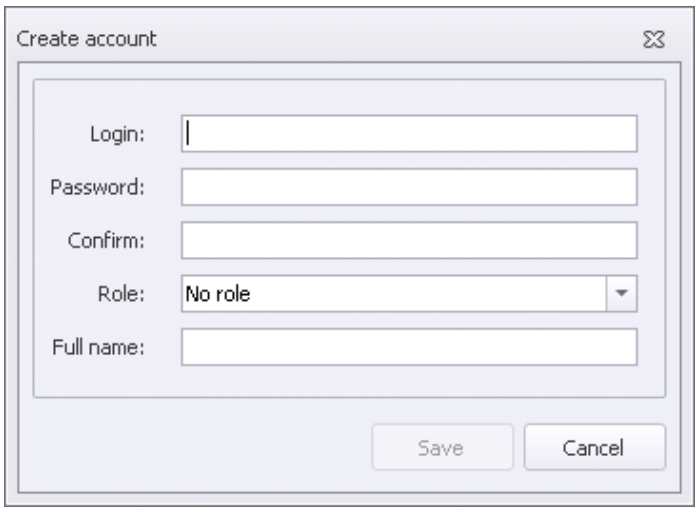
- **Status**. Indicates is an account is active ( ), blocked ( ) or deleted ( ).
- **Login**. Name of the user account.
- **Role**. Account role.
- **Full Name**. User's personal data.

Login and password, as well as account role and status are mandatory attributes. Detailed roles' description is available in "Managing Console (DM) Accounts".

## 6.2.2 Adding New Management Console (DM) Account

**To add Management Console account:**

1. In the Main Menu click **Tools > Management Console Accounts**.
2. Click Create at the right of **Management Console Accounts** dialog box.
3. Specify account settings in **Create account** dialog box:




   - **Login**. Name of the user account.
   - **Password**, Confirm. Account password.
   - **Role**. Role assigned to the account. For more information on roles see "Management Console (DM) Accounts Administration".

**Warning!**

Role **parameter** is set to **No role** by default. You won't be able to authorize in Management Console (DM) with this account.
Each account can have only one role.

- **Full name**. Personal information about account owner.

4. Click **Save**.
   This close **Create account** dialog box. A new account details will be displayed in **Management Console Accounts** dialog box.

**Note:**

New account is not locked. You can lock the account, if necessary (see "Locking or Unlocking Management Console (DM) Accountt").

## 6.2.3 Locking or Unlocking Management Console (DM) Account

Account lockout is displayed in **Management Console Accounts** dialog box.

**Warning!**

You can lock any account except Superuser or the account you are logged in with.
You cannot log in with locked account.

**To lock/unlock Management Console account:**

1. In the Main Menu click **Tools > Management Console Accounts**. This opens **Management Console Accounts** dialog box.
2. Select the row that contains the account name.
3. Change account's lock status:
   - if the account has been locked ( state), click **Unlock**.
   - if the account is unlocked ( .png] state), click **Lock**.
4. Click **Save** to apply changes.

## 6.2.4 Editing Management Console (DM) Account

> **Warning!**
>
> Editing a role of Management Console (DM) authorized account leads to the following: After you save the changes, connection to server is automatically terminated. Then you are prompted to authorize with your new settings. However, all your unsaved data will be lost.

**To edit Management Console account:**

1. In the Main Menu click **Tools > Management Console accounts**. This opens **Management Console Accounts** dialog box.
2. Select the row that contains the name of the account you want to edit.
3. Click **Change** at the right of the dialog box or double-click the highlighted row.
4. In **Change account** dialog box edit account settings, as described in "Adding New Management Console (DM) Account").
5. After all necessary settings have been configured, click **Save**.
6. To apply changes, click **Save** in the **Management Console Accounts** dialog box.

## 6.2.5 Deleting Management Console (DM) Account

Deleted account is moved to deleted accounts list. Account information remains in the database. You can view deleted accounts in **Management Console Accounts** dialog box. To do this, select **Obsolete** in **Accounts** drop-down list.

> **Warning!**
>
> Superuser account could not be deleted.
> Deleted accounts cannot be recovered.

**To delete Management Console account:**

1. In the Main Menu click **Tools > Management Console Accounts**. This opens **Management Console Accounts** dialog box.
2. Select the row that contains the account you want to remove.
3. Click **Delete** at right of the dialog box.
4. In the confirmation dialog select **Yes**.
5. To apply changes, click **Save** in the **Management Console Accounts** dialog box.

## 6.2.6 Management Console (DM) Security Schema Operation Activity Log

Management Console (DM) operation involves various security schema managing activities. Records related to activities that change database information (security schema customization, System administration) are stored in the Audit Log.
For information on Audit Log see:

- Viewing Log;
- Log Records Filtering;
- Deleting Records from Log;
- Exporting Log Records;
- Analyzing Log Records in Microsoft Excel.

### 6.2.6.1 Viewing Audit Log

You can manage audit log of Management Console (DM) users activities in Log section. To go to this section, click Log button on Navigation pane.
Security schema management activities are performed as transactions. Transactions appear as a set of records in the audit log. Each record contains information on one basic action (transaction step). Transaction may only contain one step and will be represented by a single record in audit log.
Configure filters to select records that meet certain criteria (for information on filters see "Log Records Filtering"). Filter list is displayed in Log area of Navigation pane. Records for selected filter are displayed in the main screen workspace.

> **Note:**
>
> Use additional options to adjust audit log records display (see "Additional Features").

**To view full list of audit log records,**
click **Show All Records** at the top of Navigation Pane.
**To view filtered records,**
click the filter name in the filter list.
Log information is displayed in a tabular list where each row contains a single record. Columns contain basic properties of log entries. Extended information on each record is available in **Details** panel.
**To view advanced information for particular record,**
select the row that contains the record name in the main screen workspace.
**Details** panel displays properties table containing the following information for selected entry:

| Property | Description |
|---|---|
| Transaction number (#) | Transaction number |
| Step | Basic action number within selected transaction |
| Date and time occurred | Action date and time |
| Object | Target object name |

| Property | Description |
|---|---|
| Action | Activity type |
| Object selector | Contains information that helps identify the target object.<br>Selector values interpretation see in "Selector Values". |
| Field name | Object attribute changed by the action |
| Old value | Previous value of the attribute |
| New value | New value of the attribute |
| User | Name of Management Console (DM) account that initiated the transaction |
| Windows account | Account with credentials for Windows authorization |
| Computer | Name of the computer that initiated the action |
| Sequence number | Record number in the database |

Some information from the **Details** panel is duplicated in the main screen workspace.
Number of transaction steps (and, therefore, number of log records) varies depending on the object and actions performed.

**For example:**
The image contains a few log records referring to different transactions.

| # | Step | Date and Time ... | Object | Action | Object Selector | Field Name | Old Value | New Value | User | Seq... |
|---|---|---|---|---|---|---|---|---|---|---|
| 10 | 1 | 5/29/2012 10:17... | Rule | Add | 4/Device policy/Floppy control | Active since | | 1/1/1753 12:00:00 AM | 1 | 38 |
| 10 | 2 | 5/29/2012 10:17... | Rule | Add | 4/Device policy/Floppy control | Active until | | 12/31/9999 11:59:59 PM | 1 | 39 |
| 10 | 3 | 5/29/2012 10:17... | Rule | Add | 4/Device policy/Floppy control | Operation | | Floppy: Full Access | 1 | 40 |
| 10 | 4 | 5/29/2012 10:17... | Rule | Add | 4/Device policy/Floppy control | Allow only to en... | | No | 1 | 41 |
| 10 | 5 | 5/29/2012 10:17... | Securit... | Add | 4/Floppy read-only for Device Policy | Comment | | Floppy read-only for Device P... | 1 | 42 |
| 9 | 1 | 5/29/2012 9:54:... | Log | Export | Object in (Rule, Policy) | | | | 1 | 37 |
| 8 | 1 | 5/29/2012 9:49:... | Rule | Change | 3/Device policy/CD/DVD Access | Operation | CD/DVD: Full Ac... | CD/DVD: Read Only | 1 | 35 |
| 8 | 2 | 5/29/2012 9:49:... | Securit... | Add | 3/CD/DVD read-only for Device Policy | Comment | | CD/DVD read-only for Device ... | 1 | 36 |

Transaction number 3 is associated with adding a comment to security schema.
Transaction number 4 corresponds to one change applied to a security schema. This was done in 9 steps. Steps 1-3 changed rule (DM) named "New IM client rule" in "Test Policy" security policy (DM). Each step configures a single rule (DM) parameter: for example, in step 1 an operation was defined, in step 2-3 an action period was set. Steps 4-7 added a new rule (DM), step 8 deleted another one. In step 9 a comment was added to saving security schema version.
Transaction number 5 is associated with Audit Log records export. This transaction includes one step.

### 6.2.6.1.1 Selector Values

**Selector** parameter contains instructions for target object search. **Selector** parameter value depends on particular object and performed actions. Each object has a different set of **Selector** values.
Edited security schema version is displayed for modified security schema settings followed by "/" and name of modified parameter.
When editing an object (action **Modify**) **Selector** value contains object name before modification.
The following are sample interpretations of *Selector* values.

**Example 1**
Audit Log includes the following record:

| # | Step | Date and Time Occurred | Object | Action | Object Selector | Field Name | Old Value | New Value | User | Sequence ... |
|---|---|---|---|---|---|---|---|---|---|---|
| 7 | 1 | 5/28/2012 3:42:42 PM | Policy | Add | 2/New Policy | Policy | | New Policy | 1 | 17 |

This record indicates that a rule was changed in your security schema.
*Selector value interpretation*
Transaction took place while version 10 of security schema was active. A rule named "New IM client rule" was changed in policy named "test(new)": Skype access was denied.

**Example 2**
Audit Log includes the following record:

| # | Step | Date and Time Occurred | Object | Action | Object Selector | Field Name | Old Value | New Value | U... | Sequence... |
|---|---|---|---|---|---|---|---|---|---|---|
| 8 | 1 | 5/29/2012 9:49:22 AM | Rule | Change | 3/Device policy/CD/DVD Access | Operation | CD/DVD: Full Access | CD/DVD: Read Only | 1 | 35 |

This record is a step of transaction which adds a computer group to the security schema.
*Selector value interpretation*
Transaction took place while version 3 of security schema was active. The "*Device*" policy was assigned to new computer group.

**Example 3**
Audit Log includes the following record:

| # | Step | Date and Time Occurred | Object | Action | Object Selector | Field Name | Old Value | New Value | User | Sequence Number |
|---|---|---|---|---|---|---|---|---|---|---|
| 9 | 1 | 5/29/2012 9:54:04 AM | Log | Export | Object in (Rule, Policy) | | | | 1 | 37 |

This record indicates that audit log records were exported.
*Selector value interpretation*
All records for operation on policy and rules were exported during this transaction.

## 6.2.6.2 Log Records Filtering

To access Audit Log records that meet certain criteria you can use filters.

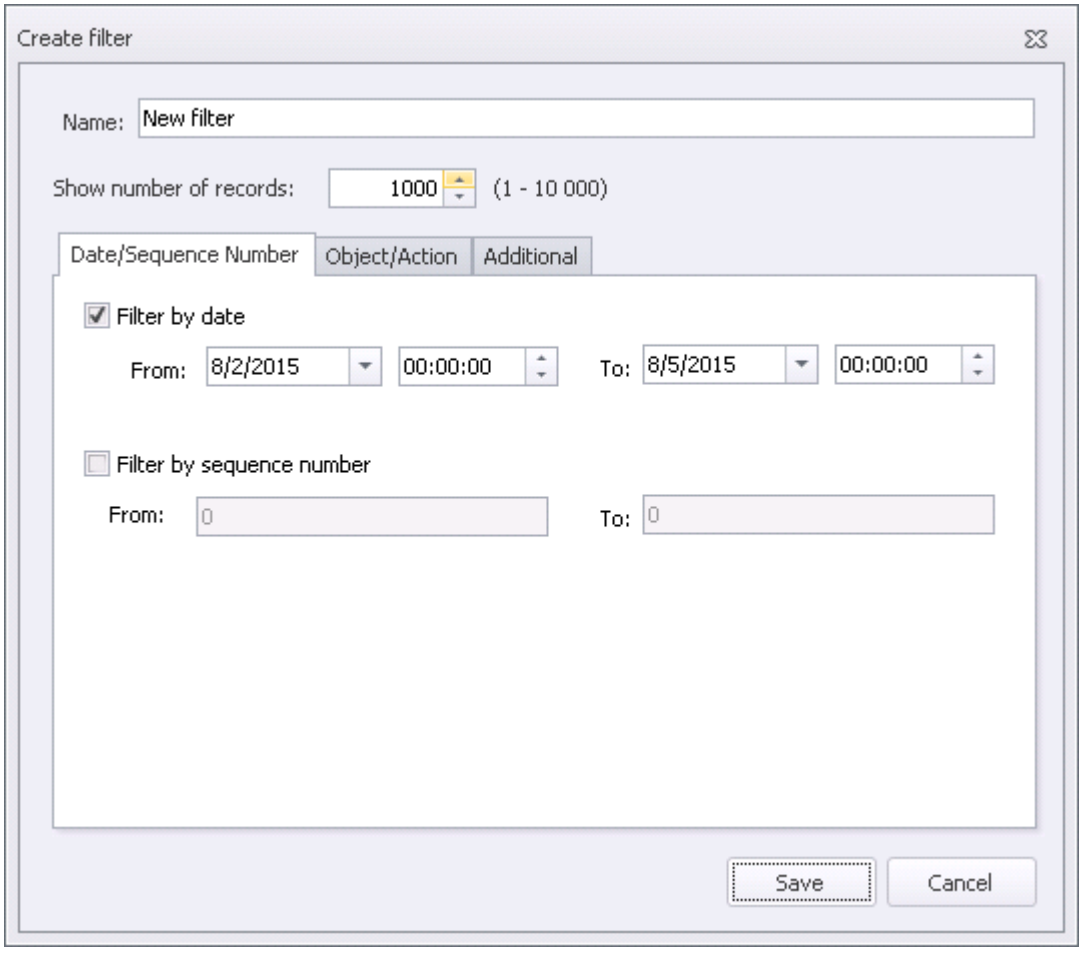
**To create a new filter or modify an existing one:**

1. Go to **Log**.
2. Follow the necessary steps:

| Action | Steps |
|---|---|
| Creating filter | • in Main Menu select **Edit > Create Filter**;<br>• click  Create filter at the top of Navigation pane. |

| Action | Steps |
|---|---|
| Editing filter | 1. In **Log** area of Navigation pane, select the name of the filter you want to edit.<br>2. Take one of the following steps:<br>○ In Main Menu click **Edit > Edit filter**;<br>○ click Edit Filter at the top of Navigation pane.<br>○ double-click with the left mouse button on the name of the chosen filter. |

These actions open dialog with filter parameters configuration.




3. Specify general filter options in filter parameters configuration dialog::
   - **Name**.
   - **Show number of records**. Limit on the number of entries displayed in Management Console (DM) workspace (1000 records by default).
4. Specofy filtration criteria. Filtration configuration is performed on several tabs and is described in the following articles:
   - Date/Sequence Number Tab;

- Object/Action Tab;
- Additional Tab.

> **Warning!**
>
> If no condition is specified in filter parameters configuration dialog, filtering parameters are disabled. When this filter is applied, all records from the Audit Log will be displayed.

5. Click **Save**.

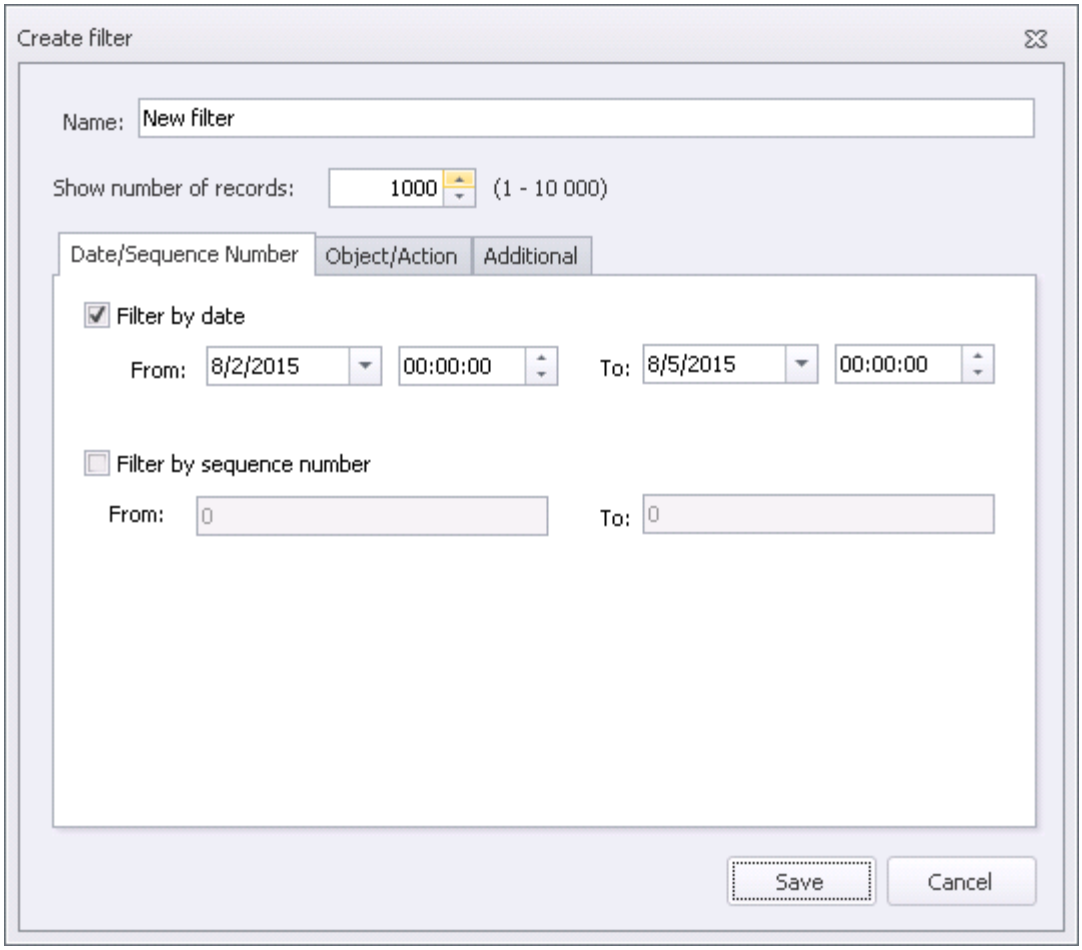
**To remove filter:**

1. Go to **Log**.
2. In **Log** area of Navigation pane, select the name of the filter you want to remove.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Delete Filter**;
   - click **Delete Filter** at the top of Navigation pane.
4. In the following confirmation dialog select **Yes** to confirm that you want to remove the filter.

#### 6.2.6.2.1 Date/Sequence Number Tab

Configure the following criteria on **Date/Sequence Number** tab:

- date and time the action took place;
- record number in the database.




**To specify date and time criteria:**

1. Flag **Filter by date** check box.
2. Specify the desired period.
   Starting and ending time is specified in **From** and **To** fields respectively. Set the date and time in right and left field respectively.

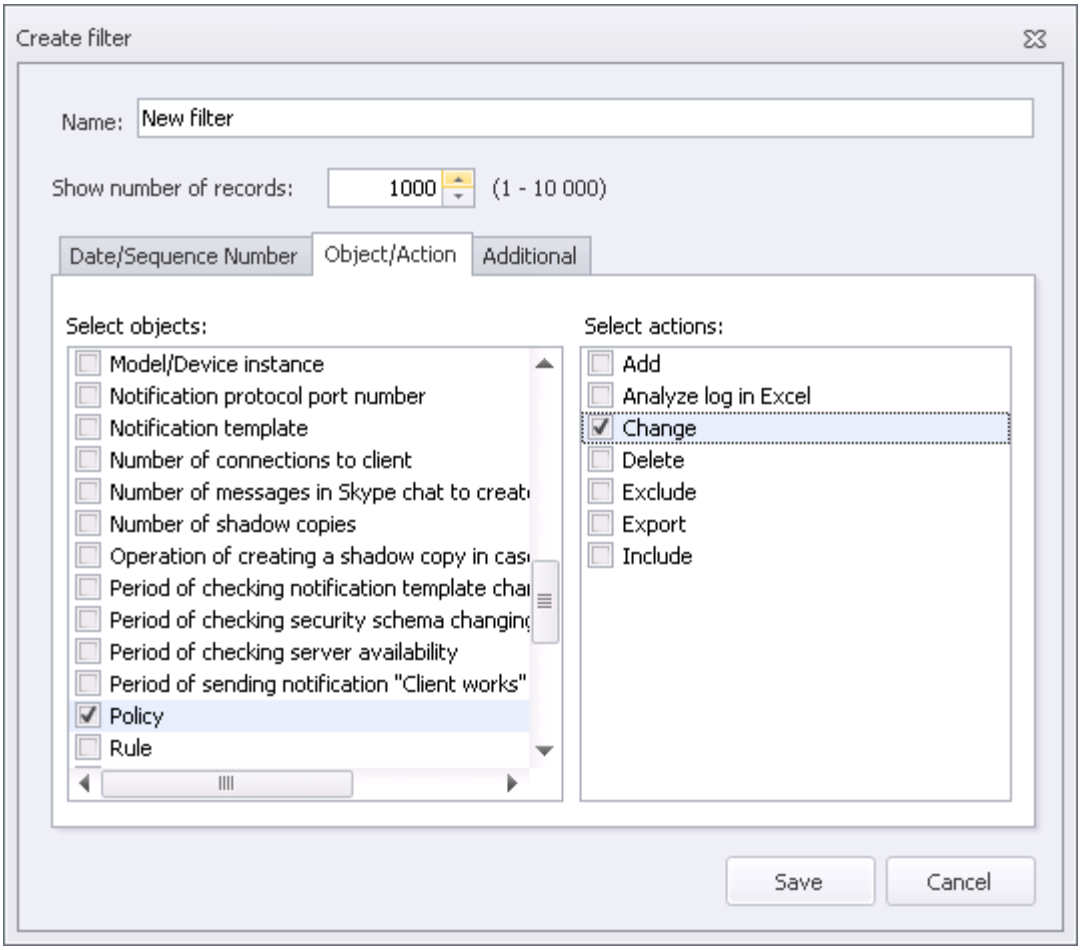
**To filter by number:**

1. Flag **Filter by sequence number** check box.
2. Specify range of numbers in **From** and To fields respectively.
   Database record numbers start from 1.

### 6.2.6.2.2 Object/Action Tab

Use **Object/Action** tab to specify the following filtering criteria:

- target object;
- action performed.




**To specify filtering criteria:**

1. Set object filtering criteria: in the left list flag the objects you want to filter out.
2. Set action filtering criteria: in the right list flag the actions you want to filter out.

### 6.2.6.2.3 Additional Tab

You can use **Additional** tab to configure additional filter settings. These settings include:

- **Object Selector**. Filter records using Selector values.
- **Field Name**. Filter records using one of the rule's (DM) attributes (for example, Operation, Action , etc.)
- **Old Value**. Filter records using the rule's (DM) previous attribute value.
- **New Value**. Filter records using the rule's (DM) modified attribute value.
- **User**. Display user's actions list.
- **Windows Account**. Display list of actions performed on behalf of selected Windows account.
- **Computer**. Display selected computer activity records.

To configure additional filtering parameters, enter their values in the appropriate filed.

**Note:**

Additional filtering values are not case-insensitive.

### 6.2.6.3 Deleting Records from Log

**Warning!**

Log records can be deleted only by Superuser.

**To delete log records:**

1. In Main Menu click **Edit > Delete log entries**.
2. Enter transaction number in **Delete** dialog.

**Warning!**

Note that audit log records relating to selected transaction or previous transactions will be deleted.

3. Click **OK**.

### 6.2.6.4 Exporting Log Records

You can export log records to XLS, HTM or TXT files. Later you will be able to view exported records with applications associated with appropriate file formats.

**To export audit log records:**

1. Go to **Log**.
2. Take one of the following steps:
   - To export records selected by the filter, click the filter on Navigation pane.
   - To export the whole log, click  Show All Records at the top of Navigation pane.
3. Take one of the following steps
   - click  **Export Log** button in the top of Records area
   - in Main Menu click **Edit > Export Log**
4. In the next dialog, specify target file name, type and directory.
5. Click **Save**.

This exports audit log records to selected file.

### 6.2.6.5 Analyzing Log Records in Microsoft Excel

To enable audit log analysis in Microsoft Excel, you must install the application on the computer that will be used to run the operation.

**To view Audit Log records in Excel:**

1. Go to **Log**.
2. Take one of the following steps:
    a.
        - To view records selected by the filter, click the filter on Navigation pane.
        - To view the whole log, click **Show All Records** at the top of Navigation pane.
3. In the Main Menu click **Edit > Analyze Log in Excel**.

This opens selected log in Microsoft Excel.

## 6.3 General System Settings

The System has a set of global settings that should be general for all active polities and rules in Device Monitor system. You can configure this settings from menu: **Tools > Settings**. See more information:

- Common Settings for Clients;
- Settings of Corporate Network;
- Network Traffic Control;
- Device Monitor Server Settings. Connecting to Traffic Monitor Server;
- Connecting to LDAP Server;
- Employee Notifications about Policy Violations;
- Exclusion of Application from Interception;
- Application control;
- Event Storage;
- Import/Export Configuration;
- InfoWatch Device Monitor Server Manager.

**Warning!**

Modified settings will apply at managed computers after Clients at every computer would receive notification from Server (when checking server availability or when checking security schema changing or when checking notification templates changing) and then Clients would perform update.

## 6.3.1 Common Settings for Clients

In order to provide efficient operation of Device Monitor Client applications you need to specify a set of common settings.

**To configure common settings for Device Monitor clients operation:**

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Common** node.
3. Change needed settings:

| Parameter | Description |
|---|---|
| **Connection** | |
| Period of sending notification "Client works" to the server | Interval (sec) with which the Client sends data to Server |
| Period of checking server availability | Interval (sec) with which the Client checks Server availability. |
| Period of checking security schema changing for active client only | If a Client is in active mode (i.e. computer could not open UDP-port for receiving Server notifications) then the Client surveys Server itself to receive data on changing security schema. This parameter sets a survey period (sec). |
| Period of checking notification template changing for active client only | If a Client is in active mode (i.e. computer could not open UDP-port for receiving Server notifications) then the Client surveys Server itself to receive data on changing notification templates (see "Employee Notifications about Policy (DM) Violations"). This parameter sets a survey period (sec). |
| **Client's disk space control** | |
| Free clients' disk space | Minimal size of free disk space (%) of managed computer: when it is reached, shadow copies would not be created. I.e. if when shadow copy is created, free disk space at a client computer is less then parameter value, then neither shadow copy nor its part won't be created. See details in "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage" |
| If there is not enough space for events | The managed computer dedicates space for storing 30000 events at the hard drive where Device Monitor Client is installed. If Device Monitor Client did not have connections with Device Monitor Server so that there is stored more than 30000 events controlled by rules (DM) defined for employee/computer, then any actions controlled by security schema could be denied. **To deny**, select Operation will be blocked. To allow all actions performed without a control, select **Operation will be permitted**. |
| **Speed of sending data from client** | |

| Parameter | Description |
|---|---|
| Limit the speed of sending data | If the channel is narrow you can prevent its excessively uploading by adjusting the speed of shadow copies sending to the Server. To do this check the setting and specify the upper speed limit (Kbps) in **Maximum speed of sending** data field. |
| **Events** | |
| Log events of device and cloud storage interceptors | Level of detailing when saving information about working with external devices received by Device Monitor and Cloud Storage Monitor interceptors: see details in "Configuring Device Monitor Rule (DM)", "Configuring Cloud Storage Monitor Rule (DM)", "Viewing Events". The following options are available:<br>• **None** - do not save events<br>• **In case access denied** - events are created only if security policy (DM) violation is attempted - i.e. when device usage was denied, including blocking attempts of access level exceeding. The using of external devices which are not forbidden by policies, is not logged<br>• **All** - all actions are logged (connection/usage of any devices, even from white lists) |
| Log connections outside of corporate network | Level of detailing when saving information about data transfer by network connections received by Network Monitor interceptor: see details in "Configuring Network Monitor Rule (DM)". The following options are available:<br>• **None** - do not save events<br>• **In case access denied** - events are created only if security policy (DM) violation is attempted - i.e. when connection attempt was denied. |
| **Agent activity on computer** | |
| Show employee notifications | Indicates if employee attempting to perform action forbidden by security policy (DM), would receive warning message. See details in "Employee Notifications about Policy (DM) Violations" |

| Parameter | Description |
|---|---|
| Hide Agent presence | Indicates if Windows system tray of managed computer hides Client presence on the computer.<br>If this option is not selected, the Windows system tray of the computer where the Client is installed will display  icon. By clicking at this icon, an information on DM Client operation and list of currently controlled devices is displayed.<br>Warning! If there is an antivirus protection enabled on the managed computer then the antivirus program can reveal the operation of Device Monitor: for example, in the list of processes running on the managed computer or in the list of programs that initiate a control. |
| **Code generating key** | |
| **Update** | Click Update to make the System generate a new key used to make codes of removing network connections or devices access prohibition. See details on codes in "Temporary Employee Access to Network" and "Temporary Employee Access to Devices", Request code and Confirmation code settings. The frequent key refreshment is not recommended. |

4. To apply changes click **Apply**.

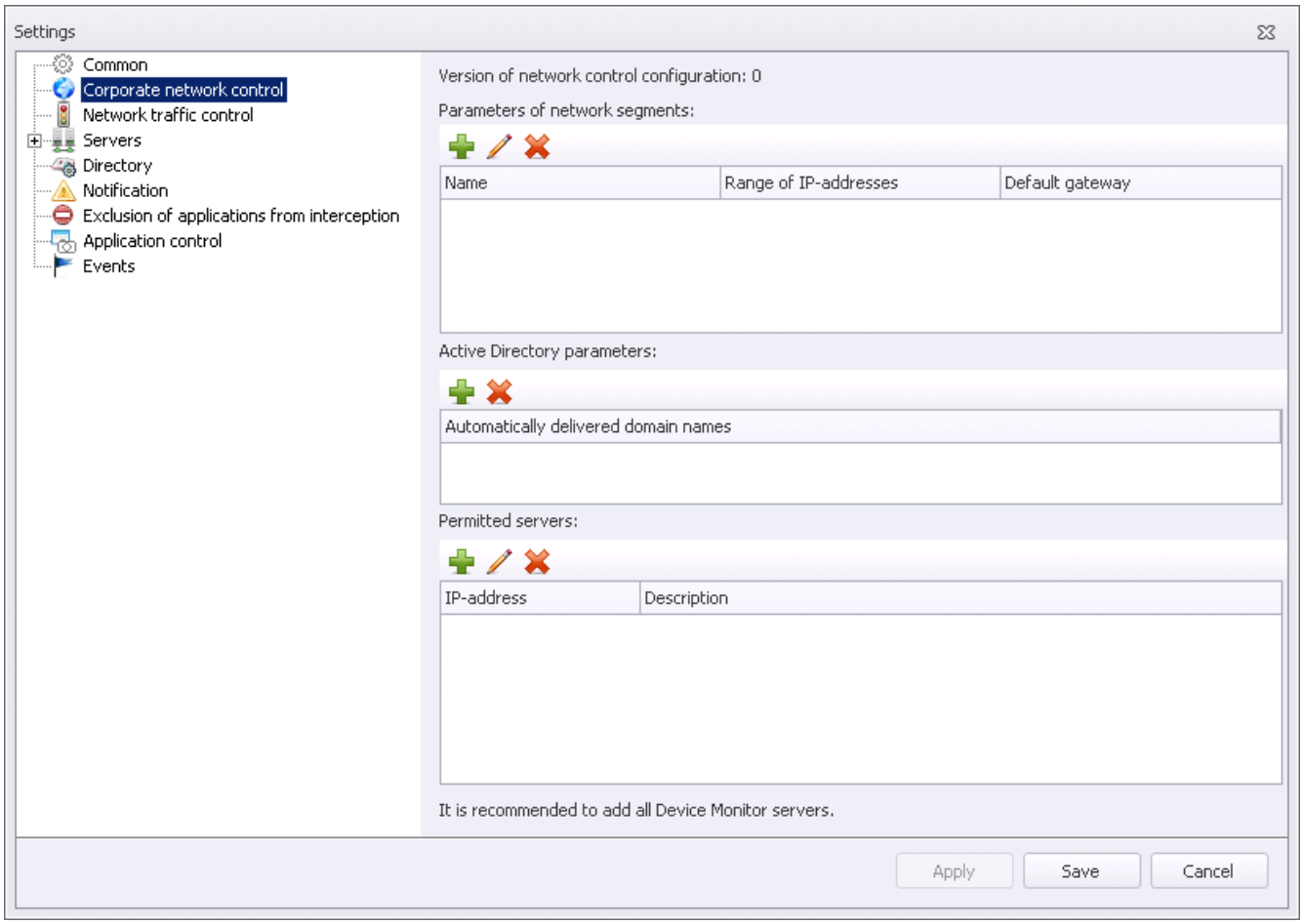
## 6.3.2 Settings of Corporate Network

In order to provide control of data transfer by network connections with **Network Monitor** (information on rule (DM) configuring see in "Configuring Network Monitor Rule (DM)") you should specify, which network segments are considered as a corporate network and which external addresses are permitted.

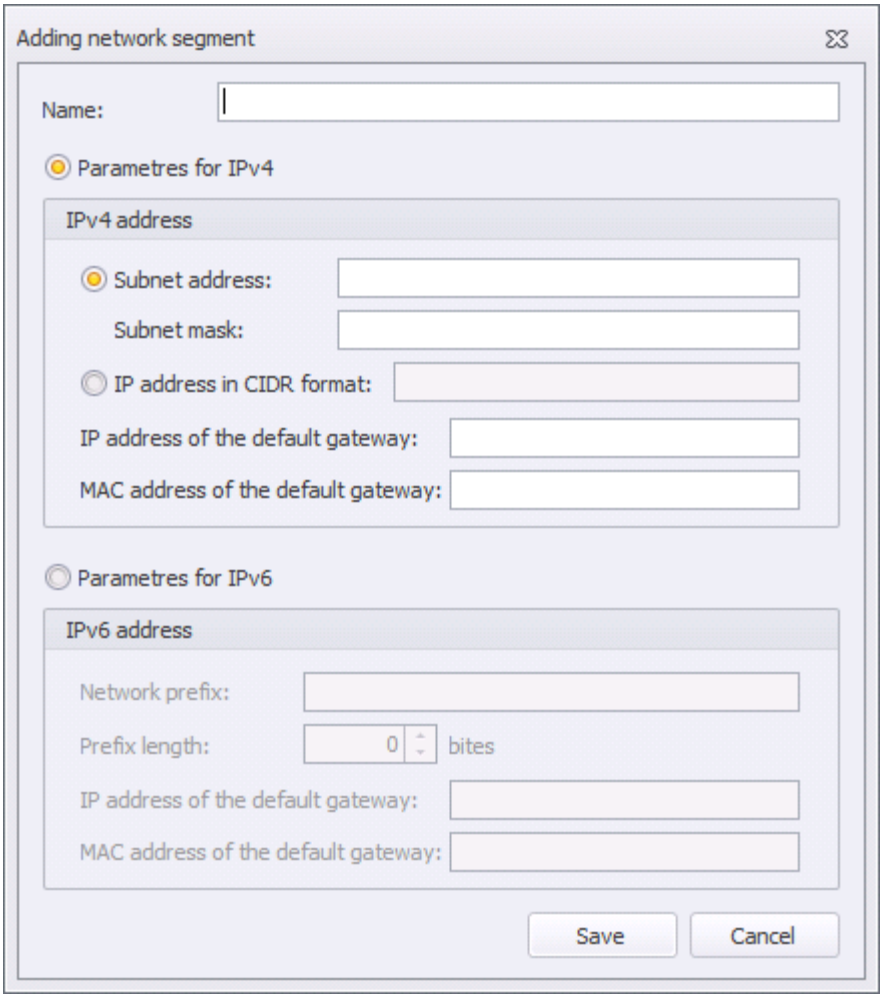
> **Note:**
>
> Permitting the external addresses may be necessary to provide work with external resources when the Client is outside corporate network: for example with VPN server or corporate network.

**To configure corporate network settings**:

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Corporate network control node**.




3. To configure network segments:
    a. In **Parameters of network segments** area click . This opens **Adding network segments** dialog.




b. Specify segment's name (description).

c. Select protocol in use: **IPv4** or **IPv6**.
If you selected Parameters for **IPv4**, then select address format (CIDR or address and mask) and specify required parameters. Also specify IP address and MAC address of the default gateway.
If you selected Parameters for **IPv6**, then select network prefix and its length. Also specify IP address and MAC address of the default gateway.

d. Click **Save**.

e. Repeat to add another segments.
To change segment parameters, select it from the list in Parameters of network segments area and click .
To delete a segment from the list, select it, click , then click Yes in confirmation dialog.

> **Warning!**
>
> When configuring the corporate network connections you should keep in mind that domain setting takes precedence over the network segments settings.

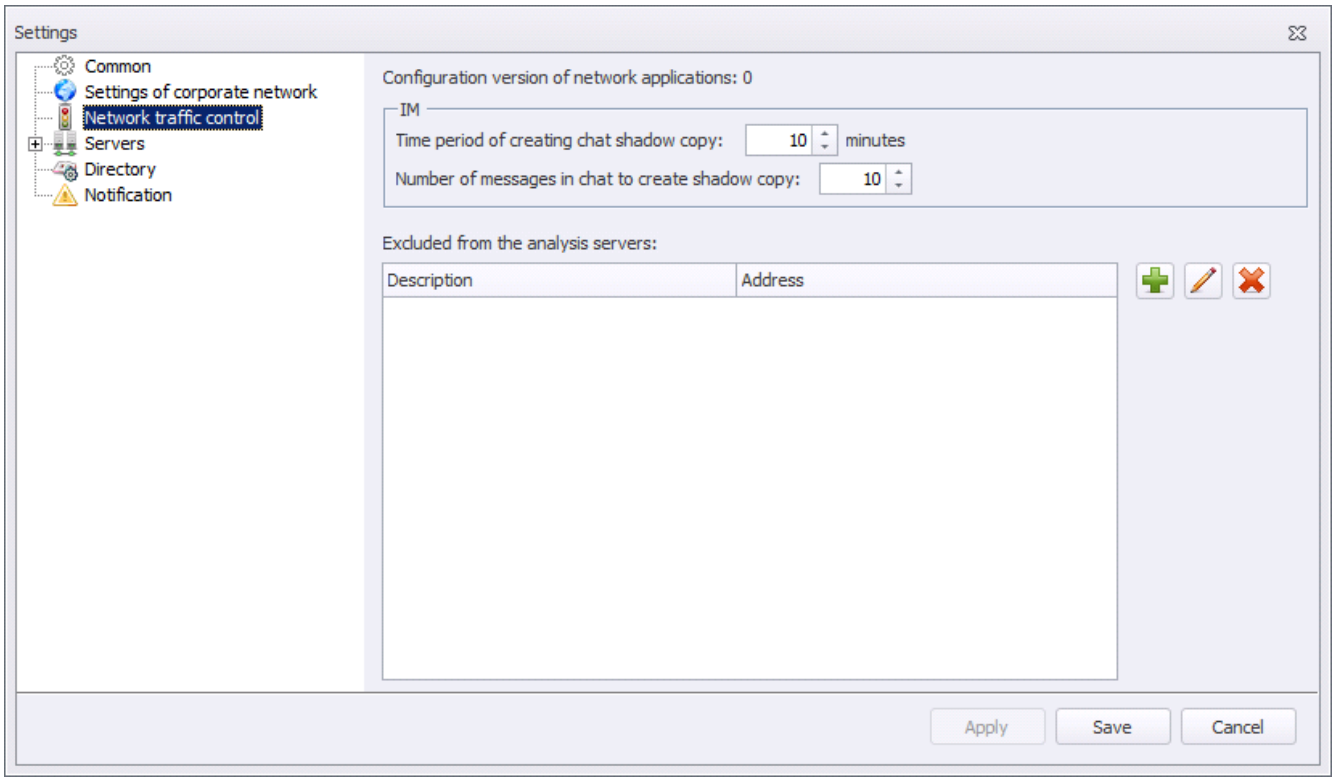
4. To define Active Directory parameters, click . Then the System automatically defines a name and GUID of a domain where Device Monitor server is deployed.
5. To set a list of servers to permit connection with:
    a. In **Permitted servers** area click .
    b. In **Add permitted server** dialog specify DNS name or IP address of a server and server description.
    c. Click **Save**.
    d. Repeat for other permitted addresses.
    To change server parameters, select it from the list and click .
    To delete a server from the list of permitted ones, select it, click , then click Yes in confirmation dialog.
6. You can also refresh a key of temporary access code forming (see "Temporary Employee Access"). Click **Update**.
7. To apply changes click **Apply**.

## 6.3.3 Network Traffic Control

In order to provide control of network traffic, Device Monitor Client acts as a transparent proxy server, to which all the connections are redirected (no matter if they are controlled protocols or not). Then Device Monitor Client parses a protocol and defines if this protocol is a subject of interception. Controlled protocols are: FTP, FTPS, POP3, SMTP, IMAP, HTTP, HTTPS, XMPP, and MMP. If data stream is protected with TLS\SSL protocol then proxy server opens traffic and defines if this stream should be controlled.
In network traffic control you can set some additional settings for instant messengers (setting rules (DM) for this interceptor see in "Configuring IM Client Monitor Rule (DM)"), mailing systems (see "Configuring Mail Monitor Rule (DM)") and FTP/FTPS traffic (see "Configuring FTP Monitor Rule (DM)"), and define excluded servers which traffic should not be controlled.

**To configure network traffic control settings**:

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Network traffic** control node.




3. Specify Skype control parameters: set a period of creating a chat shadow copy to send to Traffic Monitor. You can set a time period in minutes (**Time period of creating chat shadow copy** option) or a number of messages (**Number of messages in chat to create shadow copy** option) as criteria: the first actuated condition will be applied.
   If a file is be sent in a chat, the shadow copy is formed instantly, without accessing specified criteria.
   For details, see "Configuring IM Client Monitor Rule (DM)".

- You can specify a list of server IP addresses which protocols won't be controlled - i.e. those servers' traffic won't be transferred to the internal proxy server.

**Note:**

Permitting external addresses can be needed for providing work with external resources and updating installed programs, for example:
Firefox automatic update needs `*.mozilla.com` and `*.mozilla.net` in the list of permitted servers
Filezilla requires `update.filezilla-project.org`
Dropbox needs `*.dropbox.com`
Yandex Disk requires:

```
- oauth.yandex.ru
- webdav.yandex.ru
- clck.yandex.ru
- push.xmpp.yandex.ru
```

etc.

To set a list of servers excluded from analysis:

a. In **Excluded from the analysis servers** area click .

b. In **Add server** dialog specify DNS name or IP address of a server and server description.

**Note:**

DNS name or IP-address allows to exclude or enable interception of address or port:
To exclude by address and port, specify address and port in the following format: `address:port.`
To enable interception, specify address and port in the following format `~!address:port.`
For example, to exclude all traffic to 10.128.0.2, except to traffic to 8080, it is necessary to add exclusions in the following format: `10.128.0.2` and `~!10.128.0.2:8080`. To exclude only traffic to port 80: `10.128.0.2:80`
Excluding range of addresses, # sign is being used. Example: `#192.168.0.1-192.168.0.255!192.168.0.5`

c. Click **Save**.

d. Repeat for other permitted addresses.
To change server parameters, select it from the list and click .
To delete a server from the list of excluded ones, select it, click , then click **Yes** in the confirmation dialog.

e. When all changes are made, click **Apply**.

## 6.3.4 Device Monitor Server Settings. Connecting to Traffic Monitor Server

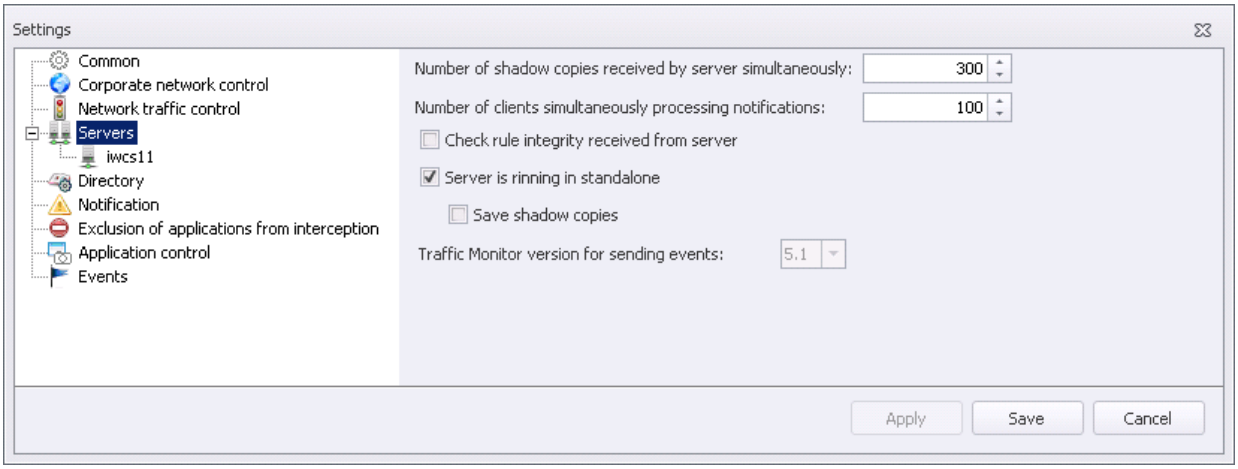
You need to set up connection parameters to be able to send events to Traffic Monitor.

**Note:**

Changing server role (General or Secondary) and attribute Notification protocol port number and Main protocol port number is being executed with InfoWatch Device Monitor Server Manager (see "InfoWatch Device Monitor Server Manager").

**To view and set up Traffic Monitor connection parameters**:

1. In main menu choose **Tools -> Settings**.
2. In **Servers** node set up the following parameters:
    - **Number of shadow copies received by server simultaneously**: - determine the number of copies which can be send to Traffic Monitor Server simultaneously.
    - **Number of clients simultaneously processing notifications**: determines number of clients, which can receive notifications (security schema) from server at a time
    - **Check rule integrity received from server** - compares rules (DM) on server and client to avoid management on client's side.
    - **Server is running in standalone** - server is running without integration with Traffic Monitor.
        - **Save shadow copies** - shadow copies are being saved locally in `ShadowCopyTempDir`.
    - **Traffic Monitor version for sending events** - current version of used Traffic Monitor. Format of events, sent to Traffic Monitor may differ depending on a version.

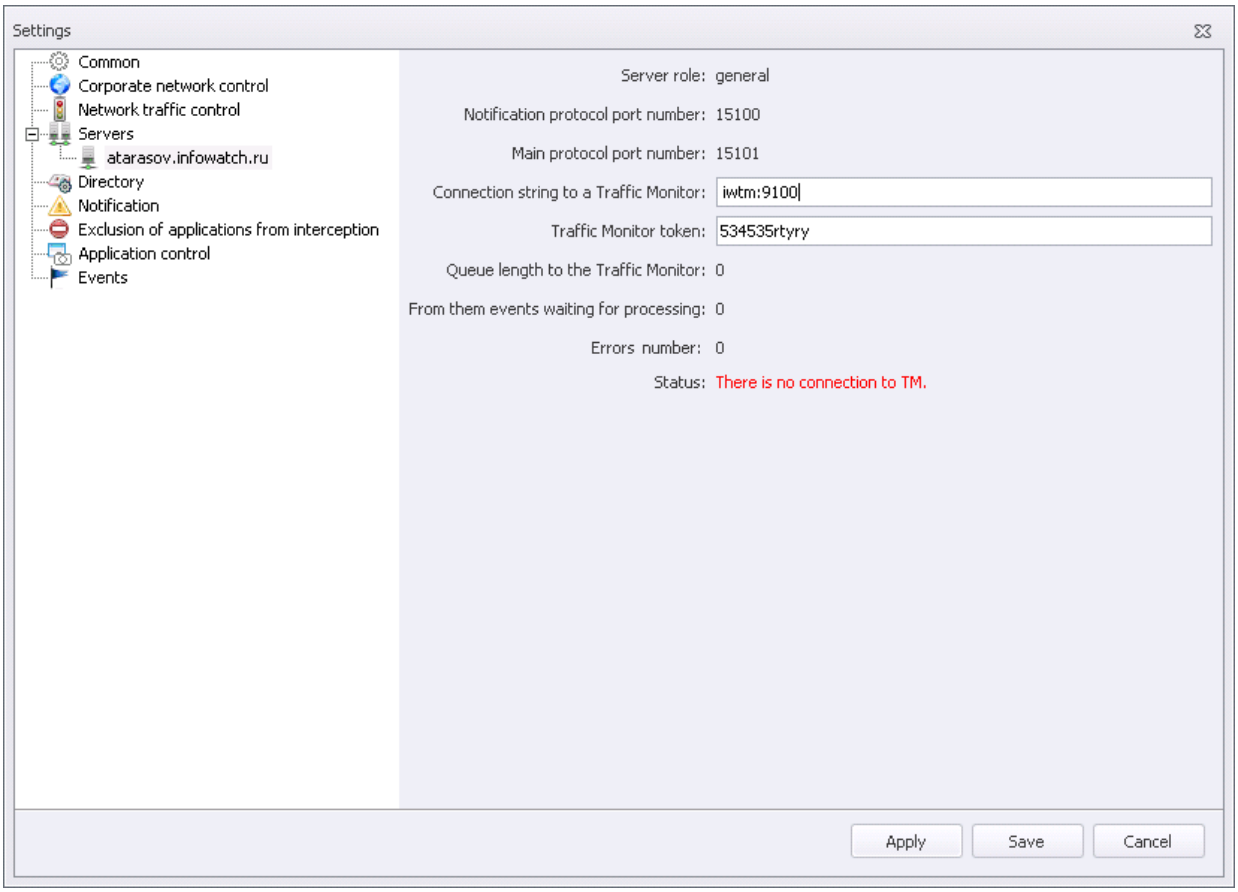



3. When selecting the server name, you will receive information on the following connection parameters:
    - **Server role** – server role (primary or secondary), assigned to this server during installation: see "InfoWatch Traffic Monitor. Installation guide", article "InfoWatch Device Monitor Server End Installation Procedure".
    - **Notification protocol port number**.
    - **Main protocol port number**.
    - **Connection string to a Traffic Monitor** – InfoWatch Traffic Monitor server address that will receive events. Address must be entered in the following format:

      `host:4101` - for Traffic Monitor of versions under 6.0;
      `host:9100` - for Traffic Monitor v. 6.0 or higher.

***host*** parameter should contain domain name or IP address of InfoWatch Traffic Monitor server. The server address is the standard URL address (Uniform Resource Identifier) with its formal syntax described in RFC 3986 http://tools.ietf.org/html/rfc3986.
port parameter contains InfoWatch Traffic Monitor server port that delivers events.

- **Traffic Monitor token** – the token to connect to API. Required for Traffic Monitor v. 6.0 or higher. You can get the actual token from your Traffic Monitor administrator.
- **Queue length to the Traffic Monitor** - number of events pending submission to InfoWatch Traffic Monitor.
- **Among them events awaiting for processing** – number of events pending processing before sending to InfoWatch Traffic Monitor.
- **Errors number** – number of events in the errors queue.
- **Status** – information on Traffic Monitor connection state.



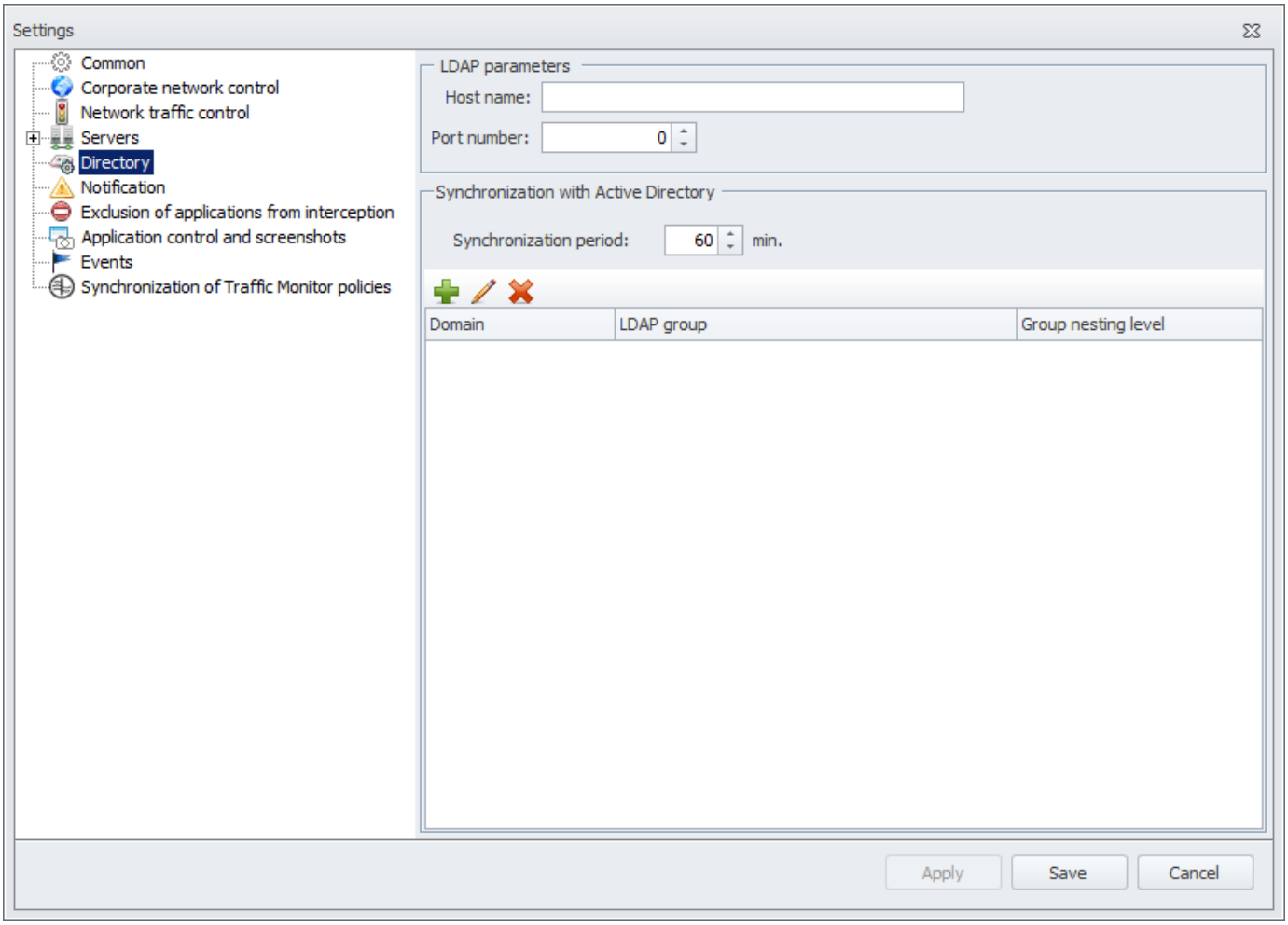

4. When all changes are made, click **Apply**.
5. Click **Save**.

## 6.3.5 Connecting to LDAP Server

In order to receive the information on workstations and employees from directory services (Active Directory or Novell eDirectory), configure Management Console (DM) connection to LDAP server.

**To display and configure LDAP connection settings:**

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Directory** node.
3. In **Host name** field specify domain name or IP-address of LDAP server.
4. If needed, specify port to redirect requests when default port (**389**) is unavailable.
5. Click **Apply**.




**To perform syncronization with Active Directory**:

1. In **Syncronization with Active Directory** area click .
2. In dialog window specify synchronization settings:
    - **Domain name.** Domain name to synchronize with.

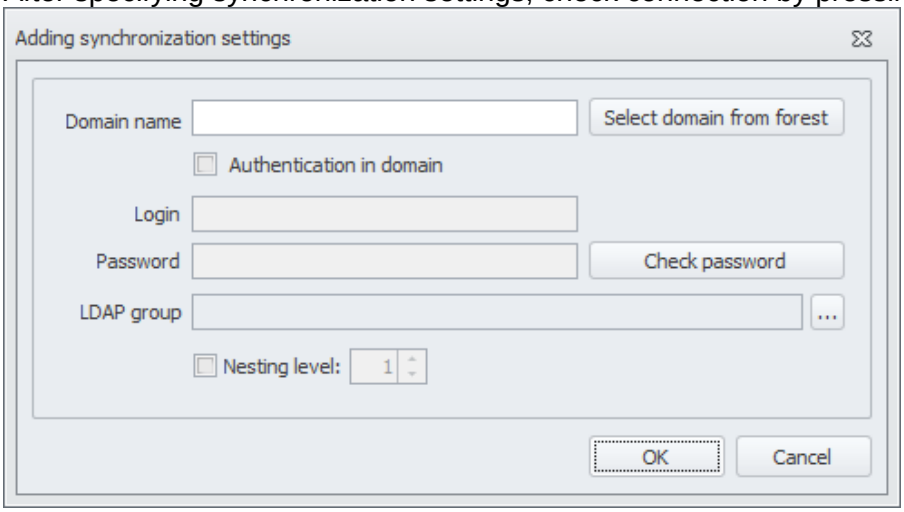
      **Note:**

      IP-address or DNS-name. DNS-name must be registered in the network.

    - **Login.** To authenticate to the domain (if necessary).
    - **Password.** To authenticate to the domain (if necessary).
    - **LDAP group.** AD Groups that need to be synchronized

- **Nesting level.** Required level of synchronized groups nesting.

After specifying synchronization settings, check connection by pressing **Check password.**




3. Click **OK**.

**To edit synchronization settings**:

1. In **Syncronization with Active Directory** area click .
2. Edit synchronization settings.
3. Click **OK**.

**To disable synchronization with Active Directory**,

in **Syncronization with Active Directory** area click .

## 6.3.6 Employee Notifications about Policy (DM) Violations

When an employee working at managed computer tries to perform an action forbidden by security policy (DM), the notification is displayed. Notifications are displayed in following cases:

- **Access to device denied** – Device Monitor rule which denies reading and writing to the device (see "Configuring Device Monitor Rule (DM)") was actuated.
- **Writing to device denied** – Device Monitor rule which denies writing to the device (see "Configuring Device Monitor Rule (DM)") was actuated.
- **Writing to open area denied** – Device Monitor rule which denies writing to unencrypted floppy drives and detachable devices (see "Configuring Device Monitor Rule (DM)") was actuated.
- **Copying/printing file denied if there is not enough space for incidents** – if Device Monitor Client did not have connections with Device Monitor Server so that there is out of dedicated space for storing information on events controlled by rules (DM) (30000 events) and common settings have Operation is blocked option selected (see in "Common Settings for Clients") then any operations controlled by current security policy (DM) are forbidden.
- **Data transfer via network protocols denied** – Ftp Monitor or IM Client Monitor rule (DM) which denies data transfer through FTP/FTPS/SMTP/POP3/MAPI/XMPP/MMP/YMSG/Skype (see "Configuring FTP Monitor Rule (DM)" and "Configuring IM Client Monitor Rule (DM)") was actuated.

- **Data transfer via network protocols denied if there is not enough space for incidents** – if Device Monitor Client did not have connections with Device Monitor Server so that there is out of dedicated space for storing information on events controlled by rules (DM) (30000 events) and common settings have Operation is blocked option selected (see in "Common Settings for Clients") then any operations controlled by current security policy (DM) are forbidden.
- **Network connection forbidden. Reduced** – Network Monitor rule (DM) which denies data transfer through any network connections except corporate network and specified permitted servers (see "Configuring Network Monitor Rule (DM)" and "Settings of Corporate Network") was actuated.
- **Network connection forbidden and request of temporary network access** – Network Monitor which denies denies data transfer through any network connections except corporate network and specified permitted servers was actuated. In this notification employee can request for temporary access to external connections (see "Configuring Network Monitor Rule (DM)", "Settings of Corporate Network" and "Temporary Employee Access").
- **Request of temporary access to the device by phone** – text displayed when user selected Request access command in InfoWatch Device Monitor Client interface, Device list tab (see "Temporary Employee Access to Devices").
- **Request of temporary access to the device by mail** – text displayed when user selected Request access command in InfoWatch Device Monitor Client interface, Device list tab (see "Temporary Employee Access to Devices").
- **Prohibition of access to cloud storage** – Cloud Storage Monitor rule (DM) which controls cloud storages client usage (see "Configuring Cloud Storage Monitor Rule (DM)", Access Denied option) was actuated.
- **Prohibition of writing to cloud storage** – Cloud Storage Monitor rule (DM) which controls cloud storages client usage (see "Configuring Cloud Storage Monitor Rule (DM)", Only download option) was actuated.
- **Prohibition of running application** – Application Monitor rule (DM) which controls user access to applications by means of white lists and black lists (see "Configuring Application Monitor Rule (DM)") was actuated.
- **Prohibition of making screenshot** – ScreenShot Control Monitor rule (DM) which controls making screenshots (see "Configuring ScreenShot Control Monitor Rule (DM)") was actuated.
- **Prohibition of pasting data** - Clipboard Monitor rule (DM) which controls data paste from clipboard (see "Configuring Clipboard Monitor Rule") was actuated.

**To disable showing notifications for employees entirely or to enable it back**:

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Common** node.
3. Deselect **Show notification** to disable showing notifications for employees, or flag it to enable notifications.
4. Click **Apply**.

If needed, you can change notification text or disable showing of any certain notification type or enable it back.

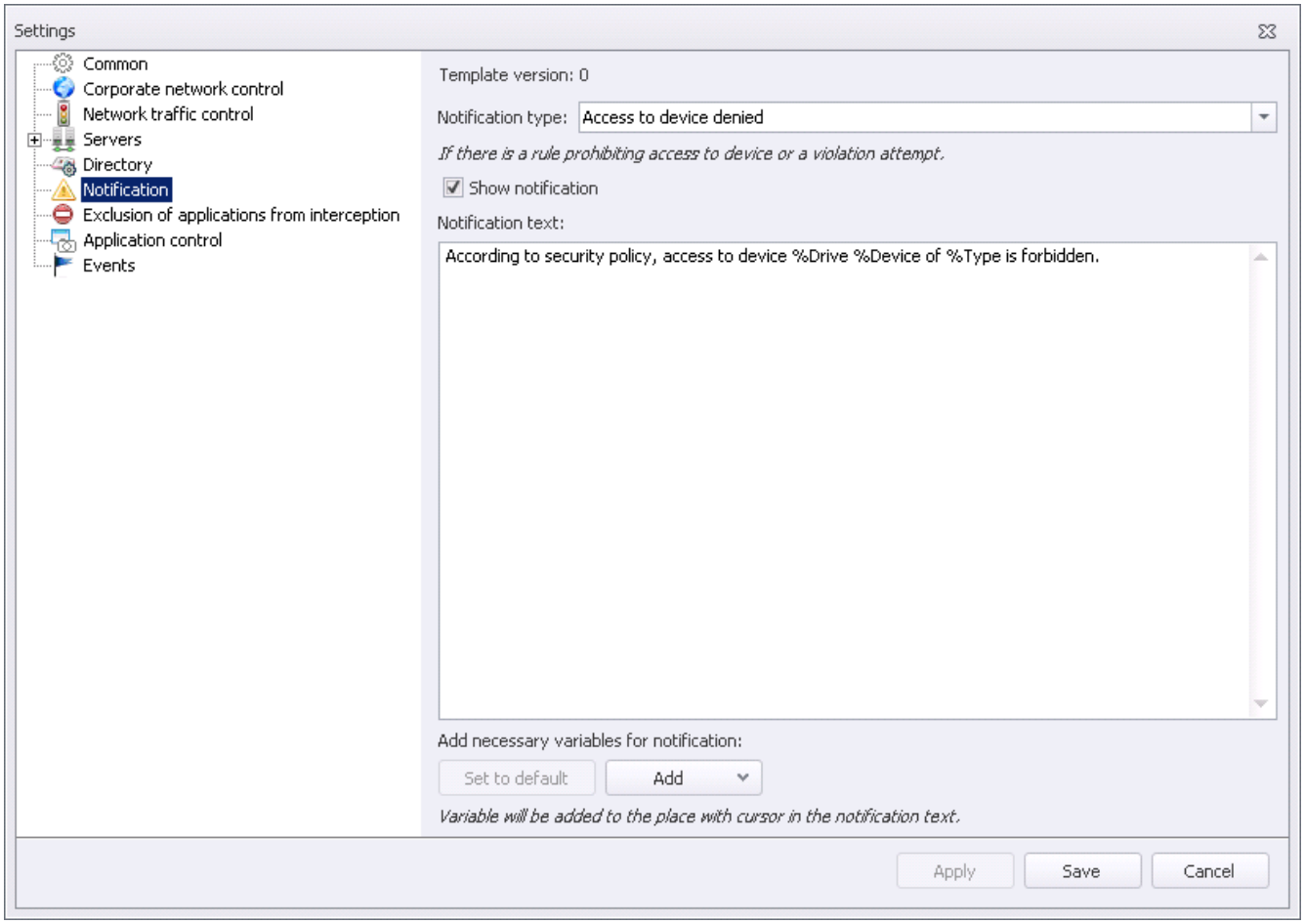
**Warning!**

If you disabled notifications using the method described above, then notifications enabled using the

method described below won't displayed yet.

**To change notification text or enable\disable certain notifications**:

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Notification** node.




3. From **Notification type** list select a notification type.
4. To enable (disable) displaying notification of chosen type, select (deselect) **Show notification**.
5. Enter notification text.

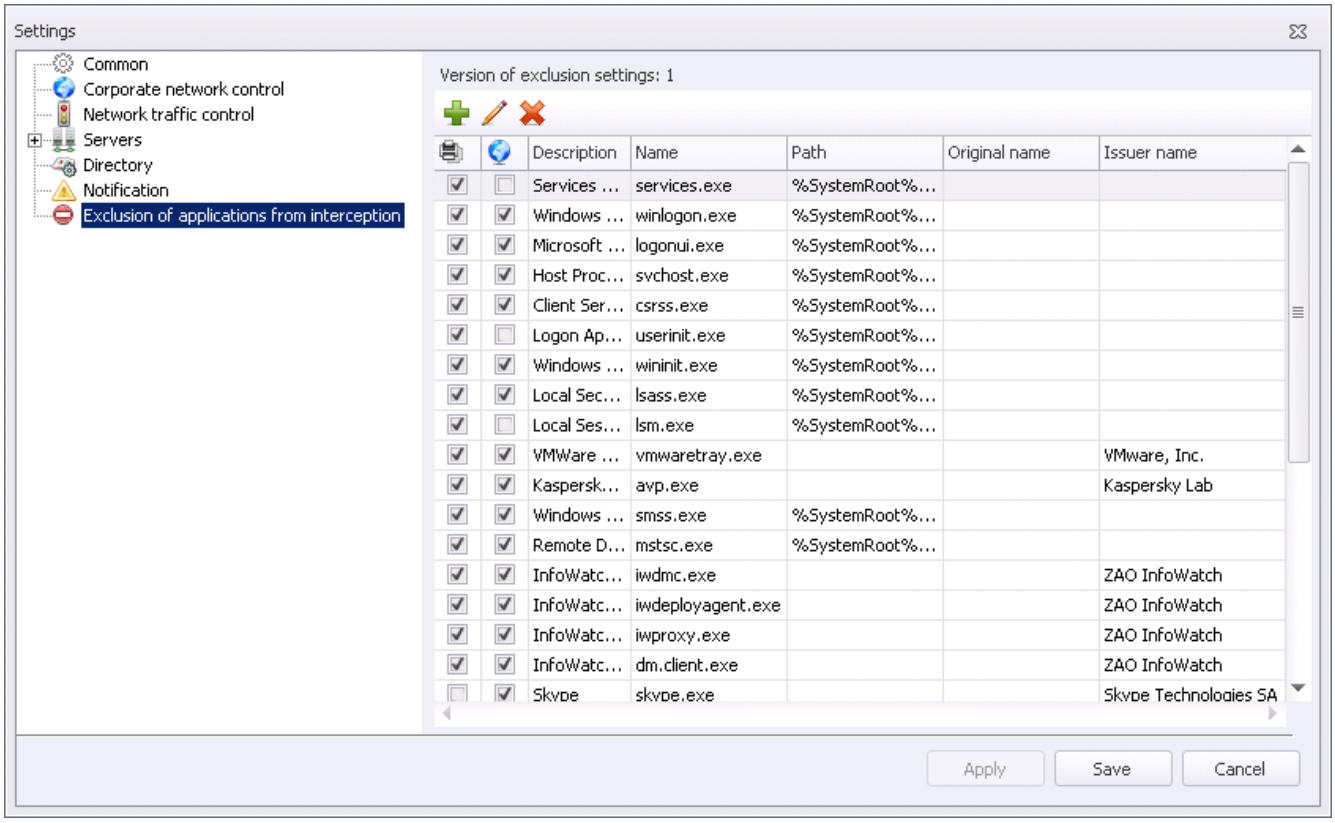
   You can use variables which would be transformed to actual data when displayed to employee: for example, type of blocked device or IP address of permitted host. To do this, set the cursor at required place of text, then click **Add** below textbox and select required variable from the list.
   To cancel changes and set default settings back, click **Set to default**.
6. Click **Apply**. If needed, change settings for other notifications by repeating steps 2-5.
7. When all changes are made, click **Save**.

# 6.3.7 Exclusion of Application from Interception

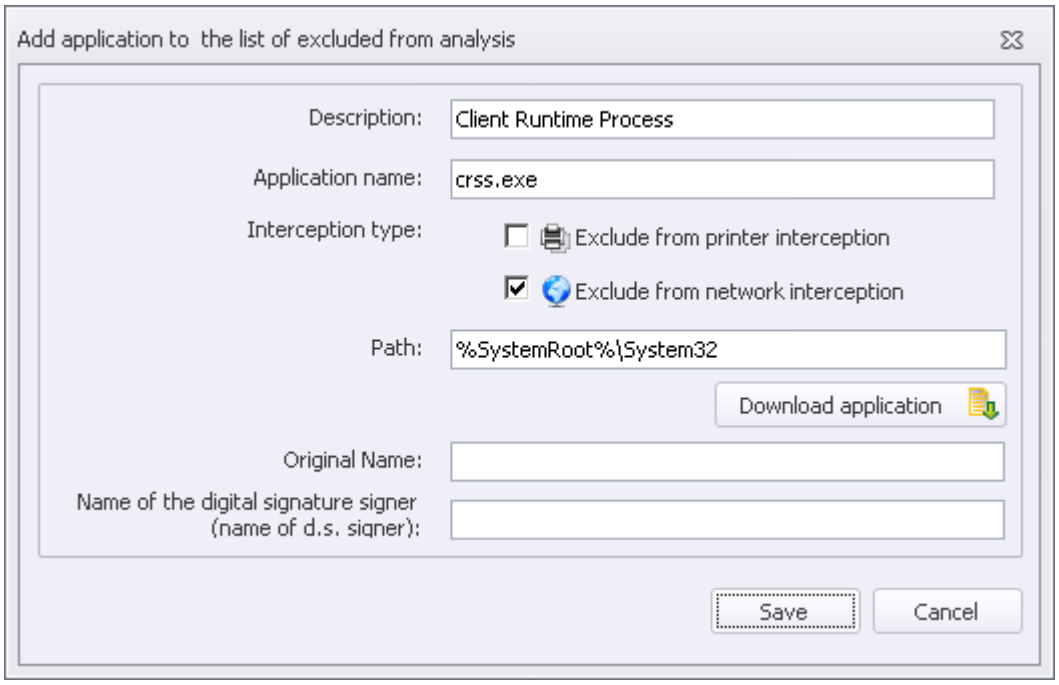
You can configure parameters of applications that will be excluded from interception. These parameters will apply at the next deployment of DM Client on computers.

**To view and configure parameters of application exclusion**:

1. In the Main Menu, select **Tools > Settings**.
2. Open **Exclusion of Application from Interception** node.




3. On the toolbar, click **Add**.




4. In the **Description** field, add a description of the application . This is a required field.
5. In the **Application name** field, enter the name of the application executable file. The exclusion is performed by the file name. This is a required field.
6. Mark the checkboxes in the **Interception type** field:
   - **Exclude from printer interception** - if you don't want to create events and shadow copies of print jobs initialized from this application;
   - **Exclude from network interception** - if you need to exclude this application activities from network interception (see "Network Traffic Control").

> **Note:**
>
> At least, one interception type must be selected.

7. You can specify application file parameters manually or automatically:
   - To specify file parameters manually:
     i. In the **Path** field, specify the directory on the Client that contains an executable file of the application (you can use system variables). If you use this parameter, then only the application located in the specified directory is excluded.
     ii. In the **Original Name** field, define the name of the application (in the shortcut menu of the executable file, choose **Properties**, **Details** tab, **Original filename** attribute).
     iii. In the **Name of the digital signature signer (name of d.s. singer)** field, define the property of the application (in the context menu of executable file choose **Properties**, **Details** tab, **Digital signature** attribute).

> **Warning!**
>
> While filling the **Original Name** and **Name of the digital signature signer (name of d.s. singer)** fields, you can prevent, for example, the user's unapproved attempt to rename the application to make its name look like the name of application excluded from interception.

- To specify file parameters automatically, click **Download application** button and select the needed file. Fields **Path**, **Original Name**, **Name of the digital signature signer** will be filled automatically.

8. Click **Save**.

## 6.3.8 Application Control

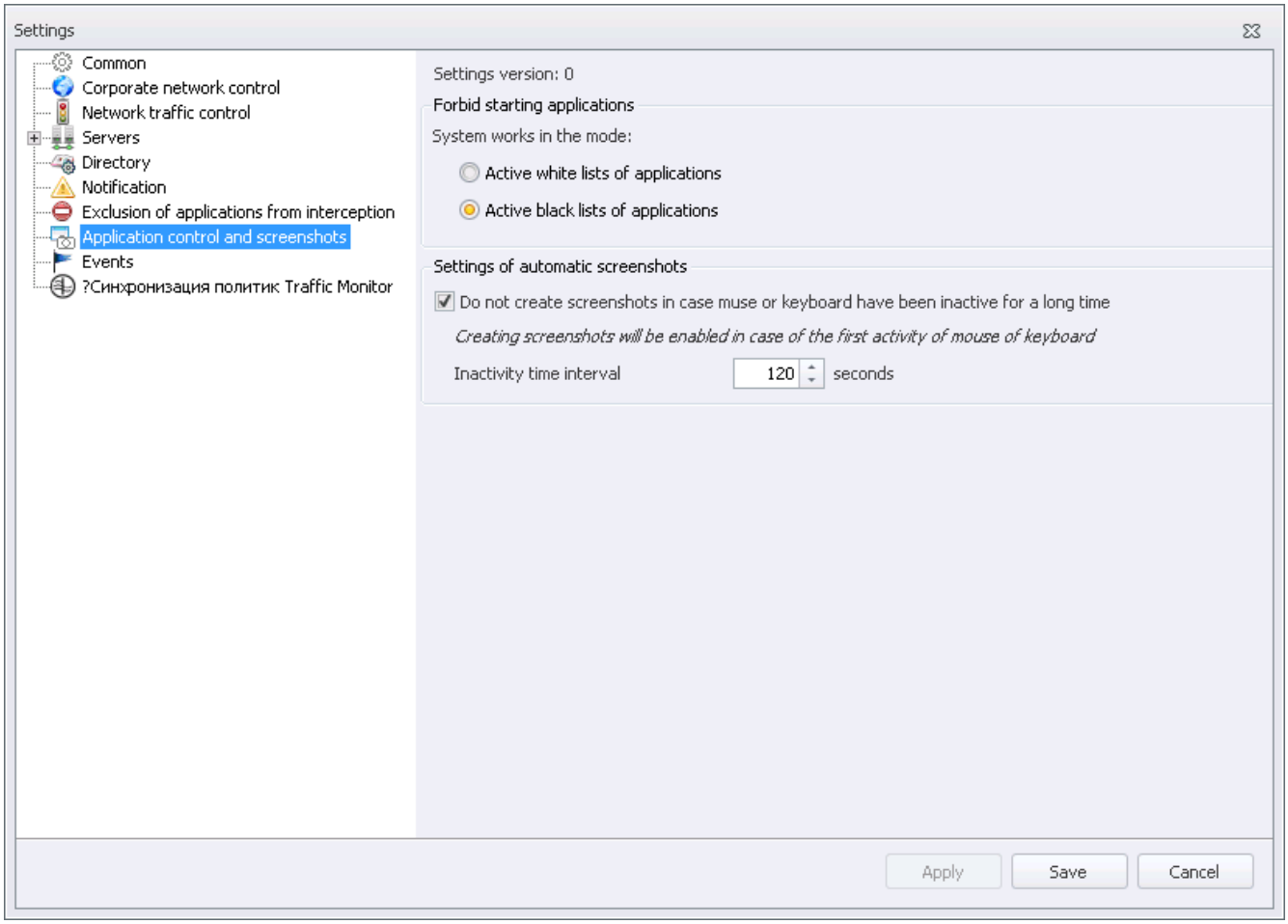
The System allows to control applications running of managed computers by allowing or forbidding some applications. For this purpose there are two operation modes provided:

- **Active white lists of application**s - all applications from the lists selected in the Application Monitor rule from the resulting policy are allowed. Other applications are forbidden.
- **Active black lists of applications** - all applications from the lists selected in the Application Monitor rule from the resulting policy are forbidden. Other applications are allowed.

See details on forming application lists in "Application Protocol".
See details on applying lists in rules (DM) regulating application access in "Configuring Application Monitor Rule".
See details on resulting policy (DM) viewing in "Viewing Resultant Policy (DM) and Resultant White List for an employee" and "Viewing Resultant Policy (DM) and Resultant White List for Computer".

**To set System mode for application control:**

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Application control and screenshots**.




3. Change mode if needed.
4. Click **Save**.

In **Application control and screenshots** section you can specify, whether it is necessary to create screenshots if there is no activity on the controlled computer.

In case **Do not create screenshots in case mouse or keyboard have been inactive for a long time** option is enabled, screenshot creation will be stopped until value in **Inactivity time interval** field is reached and renewed at first keyboard or mouse activity.

More information on how to configure automatic screenshots creation, see "Configuring ScreenShot Monitor Rule (DM)".

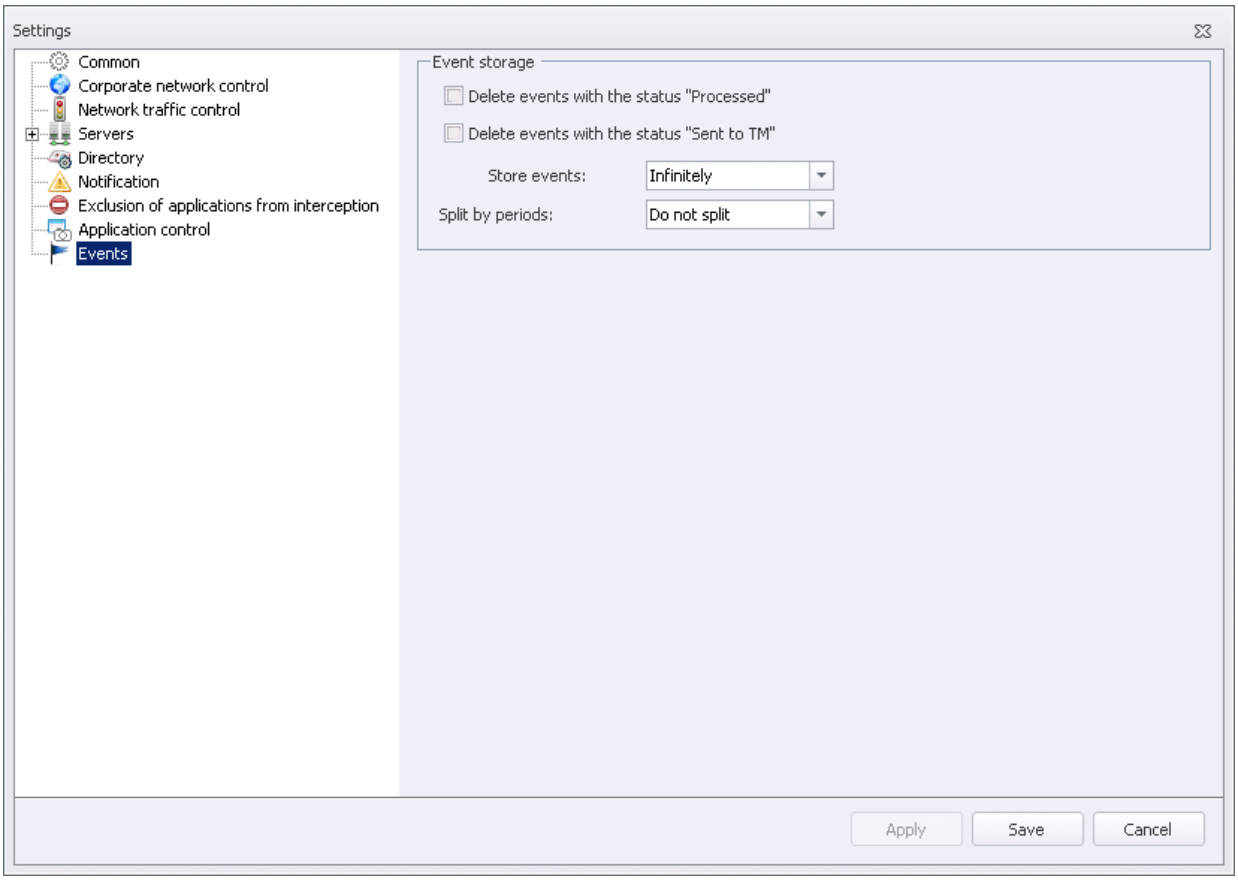
New version of applications and screenshots settings will ne applied to controlled computers after the next restart.

## 6.3.9 Event Storage

In the **Events** tab you can set the parameters of automatic event storage and deletion.

**To set up event storage**:

1. In the Main Menu select **Tools > Settings**.
2. At the left panel select **Events** node.
3. Mark the following boxes:
    - **Delete events with "Processed" status** - to delete processed Device Monitor events or events of a standalone server;
    - **Delete events with "Sent to TM" status** - to delete events already sent to TM.




4. From drop-down lists select:
    - **Store events** - to set up the time for event to be stored in DB and be displayed in the console (DM);
    - **Split by periods** - splitting traffic into blocks depending on the time it has been created to speed up connection process.

**Note:**

When **Delete events with the status "Processed"** and **Delete events with the status "Sent to TM"** options are chosen simultaneously, **Store events** becomes automatically disabled.

## 6.3.10 Synchronization of Traffic Monitor Policies

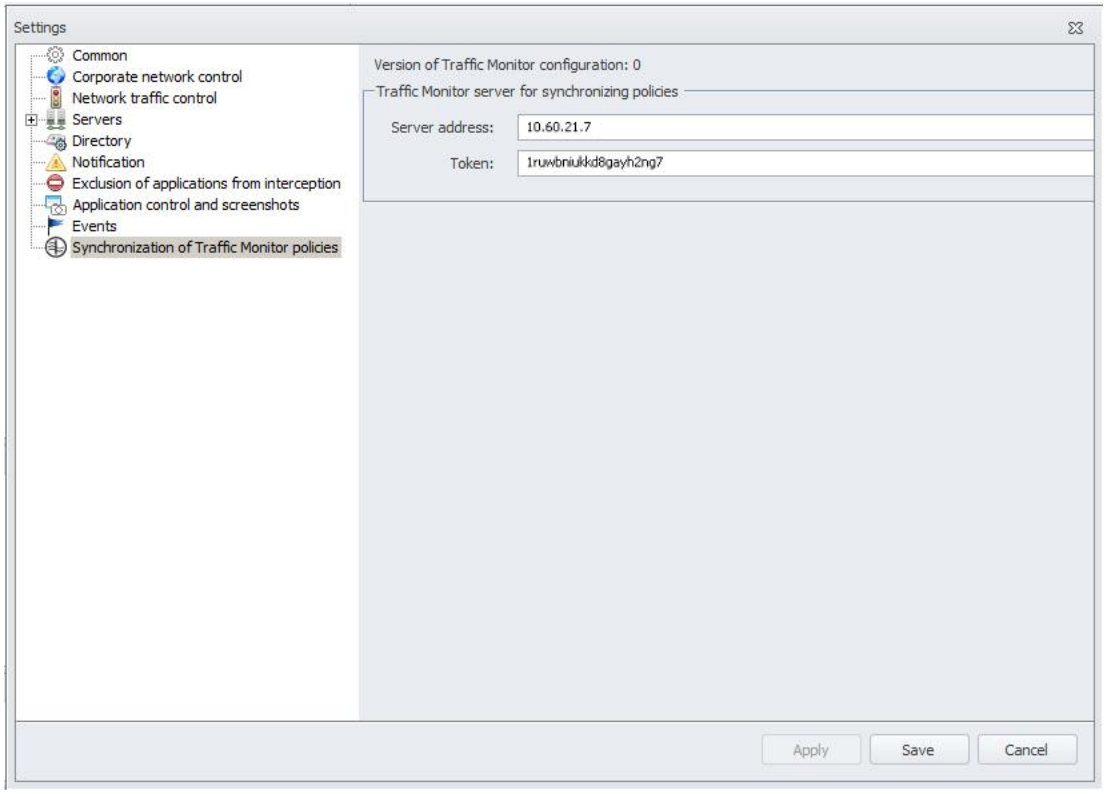
In the **Synchronization of Traffic Monitor policies** node, specify Traffic Monitor server from which Device Monitor will receive a configuration version. This configuration version is then deployed to Device Monitor agents.

**Note:**

The configuration version that is used in Traffic Monitor is displayed in TM console (see "Configuring the System"). If necessary, you can compare version numbers in Traffic Monitor and Device Monitor to make sure that Device Monitor uses an actual version.

**To synchronize policies in TM:**

1. From Console (DM) main menu, choose **Tools** > **Settings**.
2. Open **Synchronization of Traffic Monitor Policies** node.
3. Make sure that the server address (host) matches earlier specified settings (see "Device Monitor Server Settings. Connecting to Traffic Monitor Server").




4. Click **Apply**.
5. Click **Save**.

## 6.3.11 Import/Export Configuration

You can save the current configuration settings as a file. The saved file can be used for Device Monitor Server fast configuring after its reinstalling.
The exported server configuration includes the following elements:

- Security scheme (see "Managing security schema")
- Application protocol (see "Application protocol")
- Network control settings (see "Settings of corporate network")
- List if servers excluded from analysis (see "Network traffic control")
- List of applications excluded from interception (see "Exclusion of application from interception")

**Warning!**

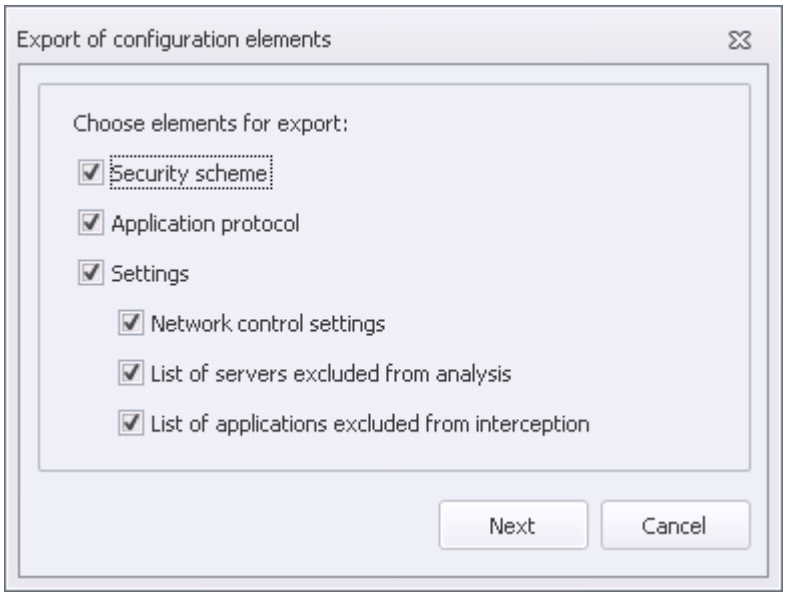
You cannot import to the System v. 6.0 the configuration file exported from the earlier version.

**To import configuration settings:**

1. In main menu choose **Tools -> Import Configuration**.
2. Find a .dmc file and click **Open**.

**To export configuration settings:**

1. In main menu choose **Tools -> Export Configuration**.
2. In dialog window choose object to export.
3. Click **Next**.




4. In the opened dialog window specify the name and the location of the export configuration file in .dmc format and click **Save**.

## 6.3.12 InfoWatch Device Monitor Server Manager

InfoWatch Device Monitor Server Manager is being used to define roles and change server settings.

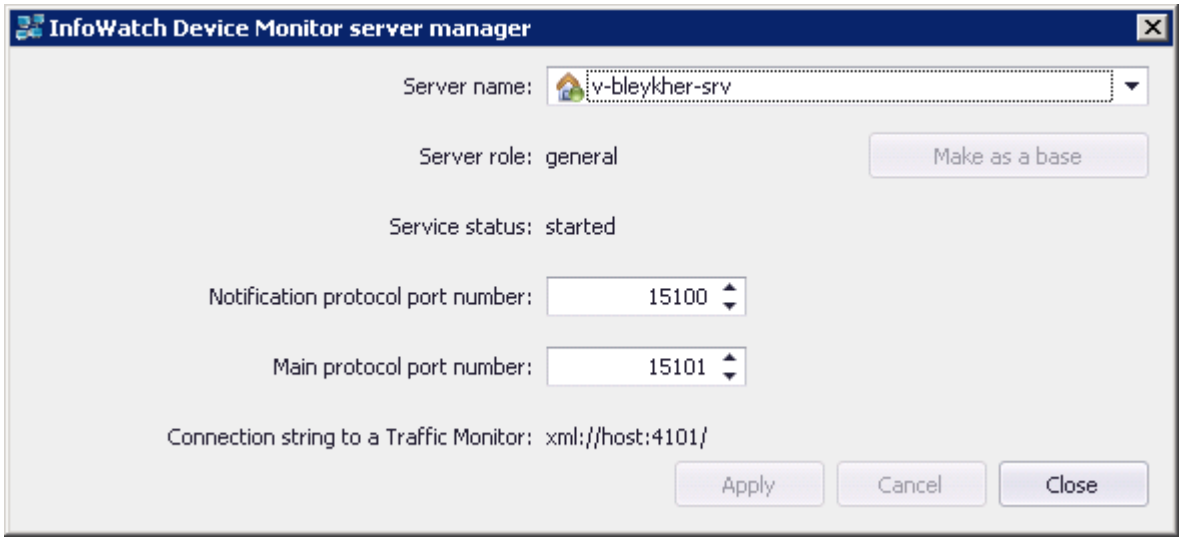
**Warning!**

There are following requirements to run the InfoWatch Device Monitor Server Manager utility:

- the computer where utility will run, must be included to the domain
- the user on behalf of which the utility will run, must have Administrator role at each of the servers to be changed
- there must be FQDN access granted to the servers (to check use ping `<server_name>.<domain_name>`)
- the utility must be run on behalf of the Administrator (use the option in the drop-down menu opened by clicking the right mouse button on the utility icon); or User Access Control must be disabled the computer.

**To set up server ports, proceed with following steps:**

1. Go to **Start -> All programs -> InfoWatch -> Device Monitor -> InfoWatch Device Monitor Server Manager**.




   **Info Watch Device Monitor server manager** window will be opened.
2. From **Server name** drop-down menu pick the necessary server.
3. Edit fields **Notification protocol port number** and **Main protocol port number**.
4. Click **Apply**.
5. Click **Close**.

**To assign general role to the server, proceed with the following steps:**

1. Go to **Start -> All programs -> InfoWatch -> Device Monitor -> InfoWatch Device Monitor Server Manager**.
   **Info Watch Device Monitor server manager** window will be opened.
2. From **Server name** drop-down menu pick the necessary server.
3. Click **Make as a base**.

> **Note:**
>
> Making one of the servers general makes other servers secondary automatically.

4. Click **Apply**.
5. Click **Close**.

## 6.3.13 Stopping and Starting Device Monitor Agent

When there are conflicts with third-party programs as well as in critical situations, user can stop Device Monitor agent running on a workstation. One can do it locally or remotely

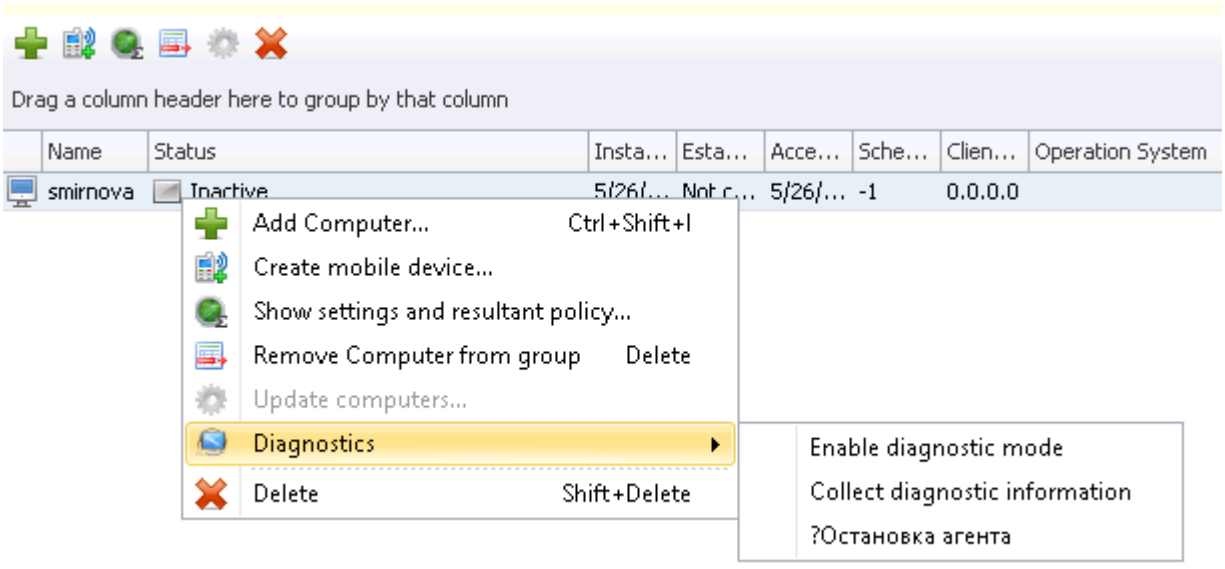
**Note:**

Some restrictions:

- When you stop the DM agent, Self Protection module is not disabled.
- The Diagnostics menu is unavalable during collecting logging results) .
- In case stopped agent has been updated, it will be started after update.
- In case agent is hidden, it cannot be stopped locally.

### 6.3.13.1 Stopping agent remotely/starting agent

Remote DM agent s being performed from DM Management Console. To stop agent, right-click on a Workstation and choose **Diagnostics -> Stop agent** (in case agent is already started on a Workstation).




When choosing **Stop Agent**, agent's work will be suspended and status of Workdtation will be changed to "Inactive".

**Note:**

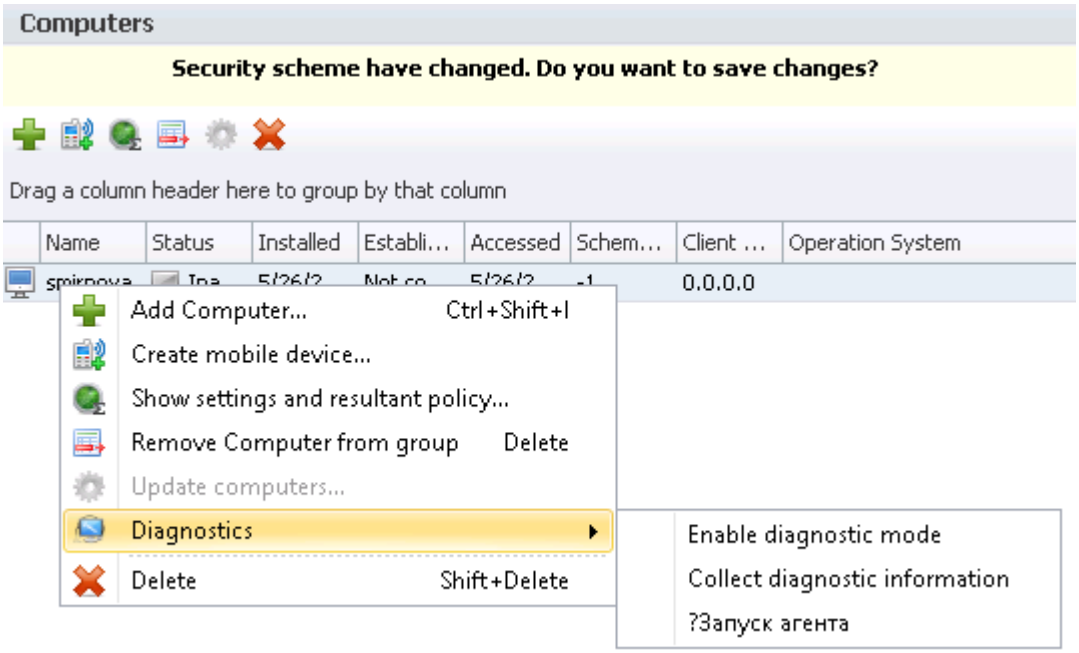
Stopped agent is available for update or deletion, but stopping is unavailable during update/deletion.In case there is no connection with the agent, stop/start are unavailable.

After the Agent has been stopped:

- events are not intercepted;
- actions are forbidden;
- notifications and DM icon on the toolbar are not dosplayed.

To start DM agent remotely, right-click on a Workstation and choose **Diagnostics -> Start agent** (in case agent is stopped).

Afte choosing agent Start option, its work will be resumed and Workstation status will go back to " Working normally".




## 6.3.13.2 Stopping/starting agent locally

Agent can be stopped/started using Windows command prompt. Run **rmtdiag.exe**, specifying the full path to it on Workstation, with the required parameters. For example:

- **rmtdiag.exe /cle** - to start agent;
- **rmtdiag.exe /cld** - to stop agent.

**Warning!**

To stop the agent it is reqired to type in DM agent uninstall password. The password is not required to start the agent.

For more information on uninstall password see "Creating Uninstallation Password Reset Task".

# 6.4 Managing Security Schema

Security schema description and operation procedures for its managing are provided in the following sections:

- Security Schema Organization;
- Common Actions in Managing Security Schema;
- Security Schema Setup;
- Temporary Employee Access to Network;
- Temporary Employee Access to Devices.

## 6.4.1 Security Schema Organization

**Security schema** of InfoWatch Device Monitor is a set of configuration parameters for managing employee controlled by InfoWatch Device Monitor. Security schema is created during server installation and is stored in the database.
Security schema includes the following parameters:

- **Security polices** with a set of rules specified for each security policy (DM).
- **Employee groups** registered in Device Monitor. Each employee group must have a security policy (DM).
- **Computer groups**. Each computer group must have a security policy (DM).
- **White lists** of fully accessed devices.
- **Signature categories** that apply File Monitor rules (DM) to certain file formats.

> **Note:**
>
> To make sure all computers and accounts are covered by security policy (DM), the default employee group and default computer group are provided in the System.

Security schema can be edited multiple times. Updated security schema will be saved as a new version of the existing one. Old security schemas are stored in the database. Use Management Console (DM) to preview security schema versions.

This topic also contains:

- Security Policies and Rules;
- Employees and Employee Groups;
- Computers and Computer Groups;
- Loading Security Schema to Managed Computers.

### 6.4.1.1 Security Policies (DM) and Rules (DM)

**Security policy (DM)** is a set of rules (DM) used for monitoring operations of data transfer to removable devices, sending documents to print and network activity; it also defines access level to managed peripherals.
The security policy (DM) is assigned to employee group or computer group according to the following principles:

- Each employee group and each computer group must have a security policy (DM).
  You can't add a new employee group or computer group without assigning a security policy (DM). The security policy (DM) for employee group or computer group is selected from available policies (DM). Therefore, security policy (DM) must be created before you add a group.
- You can't assign more than one security policy (DM) to employee group or computer group.
- One security policy (DM) can be assigned to several employee groups or computer groups. However, it is recommended that you assign an individual security policy (DM) to each group.

**Note:**

You can't remove a security policy (DM) from security schema, if it is assigned to at least one employee group or computer group.

Controlled files and devices access level is defined by security policies (DM) assigned to:

- employee group which the employee belongs to;
- computer group which include the computer used by the employee.

If employee was registered with Device Monitor for the first time, his account is automatically added to Default employee group. Therefore, each new employee's access level is initially defined by default employee group security policy (DM) and employee's computer group security policies (DM). You can change access level later by adding employee to various employee groups.

**Warning!**

In case of a multiuser access to workstation and when it is not possible to identify the initiator of the process (event), it is important to configure interception rights not only for employees, but for the computer as well.

**Rules** are restrictions and conditions that monitor data transfer to removable devices, network activity, sending documents to print, and control access to managed peripherals. A new set of rules (DM) is created for each security policy (DM).

Each rule (DM) has a validity period and is disabled after its expiry.

Rule (DM) types include:

- **Application Monitor Rule** provides application access control via black and white lists.
- **Cloud Storage Monitor Rule** provides web-client control.
- **Clipboard Monitor Rule** provides control of data paste from clipboard. You can prohibit data paste to specified applications or to all appliations of a terminal session.
- **Device Monitor Rule**. Lets you control employee access to selected type of peripherals.

- **File Monitor Rule**. Monitors data transfer and editing on removable devices. Rule (DM) can be configured to create file shadow copy and send it to InfoWatch Traffic Monitor when attempting to save a file to a removable device.
- **FTP Monitor Rule**. Both complete deny and partially restrict are available for FTP/FTPS protocol usage: for example, you can allow downloading only. Also, you can set creating shadow copies of transferred files to send them to the InfoWatch Traffic Monitor for further analysis.
- **HTTP(S) Monitor Rule** controls data exchange through HTTP and HTTPS protocol. The System allows you to create shadow copies of transferred files.
- **IM Client Monitor Rule**. Allows to control employee access to instant messengers: Skype, WhatsApp, XMPP, MMP (used in Mail.Ru Agent messenger), and mobile SMS. Rule can block access to application or just make copies of transferred files, messages and chats. InfoWatch Device Monitor sends shadow copies of files and chat sessions to InfoWatch Traffic Monitor without saving them.
- **Mail Monitor Rule**. Provides full control of incoming and outgoing e-mail. Lets you deny of sending and receiving e-mail completely or to allow receiving only or to allow both sending and receiving e-mail completely. The creating of shadow copies transferred to InfoWatch Traffic Monitor for analysis is available too.
- **Network Monitor Rule**. Lets you deny data transferring by any network connections except corporate ones or connections with specified allowed servers. The System has a global setting of which network segments are corporate network and which external addresses are allowed.
- **Photo Monitor Rule**. Lets you set creating of shadow copies of photos made by cameras of controlled mobile devices.
- **Print Monitor Rule**. Lets you to monitor printing activity. Rule (DM) can be configured to create shadow copies of print jobs, which will be sent for InfoWatch Traffic Monitor analysis.
- **ScreenShot Control Monitor Rule** allows you to control screen shots on a client side.

### 6.4.1.2 Employees and Employee Groups

Registration of controlled users (employees) is done according to the following rules:

1. Each employee belongs to at least one employee group (default group). The reason for this requirement is that security policy (DM) can only be assigned to employee groups.
   *Default* group includes all accounts that have not been added to other groups (employees newly registered in Device Monitor or employees excluded from all other groups).
   You can exclude an employee from "*Default*" group, if the account is added to at least one employee group besides the Default group.
2. After System installed, the "*Shadow copy policy*" is assigned to "*Default*" employee group. The "*Shadow copy policy*" contains following rules:

- **Document shadow copying**. File Monitor rule which sets creating shadow copies of all files written to removable devices.
- **Print shadow copying**. Print Monitor rule which sets creating shadow copies of all print jobs.
- **Skype control**, **XMPP control**, **MMP control**. IM Client Monitor rules which allow instant messengers and set creating shadow copies of all messages, chats and outgoing files.
- **FTP control**. FTP Monitor rule which allows FTP/FTPS protocol and set creating shadow copies of all files sent by FTP/FTPS.

- **HTTPS control**. HTTPS Monitor rule, which creates a post-event, without any dependence on its size, in case transfer is being performed via encrypted channel. Shadow copy is being created, in case request size, transferred via encrypted channel is not smaller than 40 B and not bigger than 40 MB.
- **Mailing subsystem control**. Mail Monitor, which allows incoming and outgoing mail and creates shadow copies for email, sent via encrypted channel, when its size is not bigger than 40 MB.

#### 6.4.1.3 Workstations and Workstation Groups

Device Monitor Workstation belongs to at least one workstation group (default group). The reason for this requirement is that security policy (DM) can only be assigned to workstation groups.
Default group includes all workstations that don't belong to other workstation groups (Device Monitor workstations newly registered in the System or workstations excluded from all other groups). "*Device policy*" is assigned to default workstation group after the System installation. This policy (DM) is empty: it does not contain any rule (DM).
You can remove a workstation from default group only if it is added to at least one workstation group besides default group.

#### 6.4.1.4 Uploading Security Schema to Managed Workstations

The security schema of managed workstations must be up to date. This is ensured by Client-Server interaction on managed workstations.
Server transmits security schema to managed workstations automatically in the following cases:

- when you save your new or edited security schema
- if the employee was registered which's access level is unidentified. Such employee is automatically added to default employee group, and security schema is updated.

If the managed workstation is disconnected from the network where InfoWatch Device Monitor is deployed, the polices (DM) will still be active, but they won't be updated and shadow copies will be stored on the hard drive. After the managed workstation has connected to InfoWatch Device Monitor server, it automatically updates policies (DM) and sends shadow copies to server.

### 6.4.2 Security Schemas Overview

Security schema guidelines are available in the following sections:

- Viewing Active Security Schema;
- Viewing Old Security Schema;
- Security Schema Comments;
- Editing Security Schema;
- Updating Security Schema;
- Exporting/Importing Security Schema.

For general information on security schemas see "Security Schema Organization".
For security schema configuration guidelines see "Security Schema Setup".

### 6.4.2.1 Viewing Active Security Schema

Active security schema is displayed on Management Console (DM) by default.
Security schema configuration information is displayed in **Policies**, **Employees**, **Workstations**, **White Lists** and **Signatures** sections (see "Management Console (DM) Sections").
Security schema configuration is displayed as groups of elements. Section groups list are displayed in Navigation pane preview. Each group of elements has an icon (see the table).

| Icon | Elements group |
|---|---|
|  | Default workstation group |
|  | Workstation group |
|  | Default employee group |
|  | Employee group |
|  | Default signature category |
|  | Signature category |
|  | Devices white list for employee |
|  | Devices white list for employee group |
|  | Devices white list for workstation |
|  | Devices white list for a group of workstations |
|  | Audit log filter |
|  | Security policy |

**To view an information about security schema section**:

1. Open the section (see "Management Console (DM) Sections"). The list of element groups will be displayed on Navigation pane.
2. On Navigation pane select the element group you want to view. This will display all elements of the group in the main screen workspace.
3. To view detailed information on individual elements, click the row containing element name. This opens the element's properties table on **Details** panel.

> **Note:**
>
> You can customize the main screen appearance (see "Main screen customization").

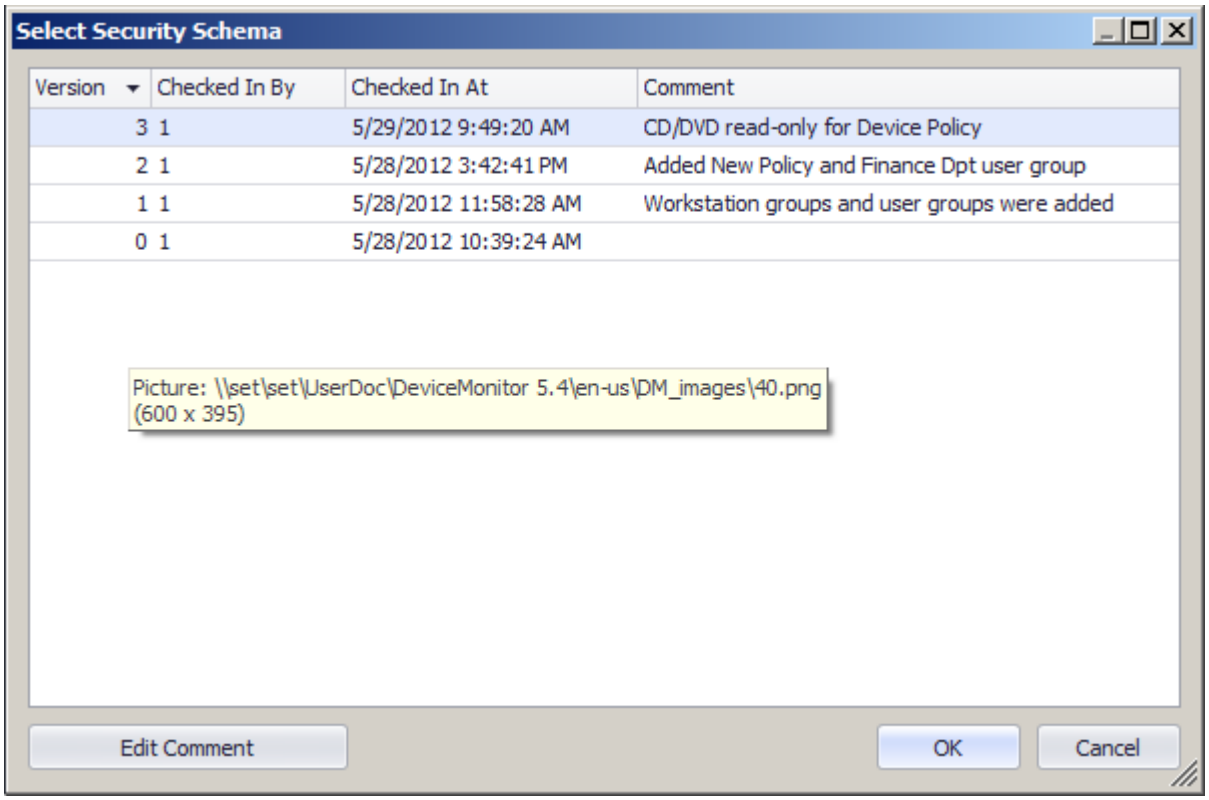
## 6.4.2.2 Viewing Old Security Schema

**Note:**

If you view previous security schemas in editing mode, your recent changes will be discarded.

**To view older security schema**:

1. In Main Menu select **Security Schema > View Old Security Schema**.
   This opens Select security scheme dialog.




   Each security schema features the following information:

   - **Version**. Security schema version number.
   - **Checked in by**. Name of the version owner.
   - **Checked in at**. Last saved version date and time.
   - **Comment**. Additional information.

**Note:**

You can edit comments to any version in this screen (see "Security Schema Comments").
Information on current Management Console (DM) security schema (version number and comment) is displayed on the status bar.

2. In **Select security scheme** dialog select the row that contains the version number of security schema you want to viewed.
3. Click **OK**.

After you click **OK** the selected security schema version will be loaded into Management Console (DM). When working with old version, the state bar displays: "*Old security schema*".

**To return to preview and active security schema**,
open **Security Schema > View Latest Security schema** in the Main Menu

### 6.4.2.3 Security Schema Comments

In comments you can specify additional information on your security schema. You can add comments to each version of security schema.
Comments to current security schema are displayed in brackets to the right from schema version number on the status panel.
You can view comments to all security schema versions in the **Select Security Schema** dialog (see "Viewing Old Security Schemas").

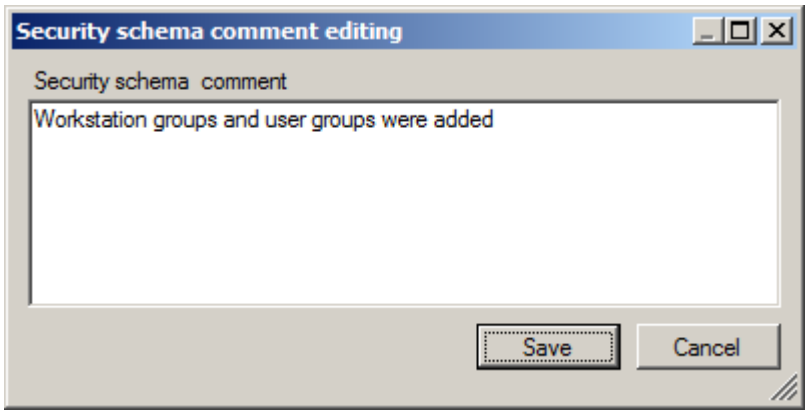
**Note:**

You can add comments to security schema regardless of its state (whether it is in editing mode or not).

**To add/edit security schema comment**:

1. Take one of the following steps:
   - (*For the current security schema only*). In Main Menu select **Security Schema > Edit Current Security Schema Comment**.
   - (*For any security schema version except the current one*). In the Main Menu select **Security schema > View Old Security Schema**. This opens **Select Security Schema** dialog. In this dialog, select the row containing the right security schema version. Then click **Edit Comment**.

   These actions open **Security schema comment editing** dialog.




2. Enter your comment in the dialog box. Maximum comment length - 512 characters.

> **Note:**
> For line break, press **<ENTER>** or **<CTRL>+<ENTER>**.

3. Click **Save**.

### 6.4.2.4 Editing Security Scheme

> **Warning!**
> Security scheme can be edited only by one user at a time. If security scheme is edited, an information about user who edits and workstation where editing is performed, is displayed at red-highlighted string at the top of main screen. See details in "Awaiting Editing Ends. Unlocking Security Scheme".

All changes are implemented in security scheme editing mode. This mode protects existing security scheme from potential editing errors. The System automatically switches to editing mode just after any Console (DM) user makes any change of security scheme parameters. Changes are saved only by **Save** command.

> **Warning!**
> If server connection terminates during security scheme editing process, all unsaved changes will be lost.

**To edit security scheme**:

1. Take one of the following steps:
   - in the Main Menu select **Security Scheme > Edit**
   - click **Edit** on Toolbar

- make any change of security scheme parameters (security policies (DM), workstations, employee accounts, device white lists, signature categories).
  These actions open security scheme editing mode.

> **Note:**
>
> You can edit only the latest version of the security scheme. Thus, Save command is not available when viewing previous versions. To open current security scheme version, open **Security scheme** > **View Latest Security Scheme** from the main menu. Information on security scheme currently used by Management Console (DM) is displayed on the status bar.

2. Edit security scheme parameters:
   - security policies (see "Security Policies");
   - workstation groups (see "Workstations");
   - employee accounts lists (see "Employees");
   - device white lists (see "White Lists");
   - file signature categories (see "Signatures").
3. When all changes are made, save your security scheme. To do this, follow these steps:
   - click **Save** at the top string of main screen workspace where "*Security Scheme have changed. Save changes?*" message is displayed
   - in the Main Menu select **Security scheme > Save**
   - click Save on Toolbar.
     These actions save the changes and close security scheme editing mode.

> **Note:**
>
> To discard changes, select **Security Scheme** > **Undo editing** or click **Undo editing** button on the toolbar. This closes scheme editing mode discarding all changes.

#### 6.4.2.4.1 Awaiting Editing Ends. Unlocking Security Schema

Security schema can be edited only by one user at a time. Changes are applied only after you have saved your security schema.
If security schema is edited, an information about user who edits and workstation where editing is performed, is displayed at red-highlighted string at the top of main screen.
If you try to edit any parameters of security schema (security policies (DM), workstations, employee accounts, device white lists, signature categories) while security schema is editing by another user:

1. Management Console (DM) displays warning message.
2. When another user saves his changes (or cancel them) Windows system tray would display notification: "***Security schema is in "read-only" mode***".

Information about user who edits the schema currently, is displayed at the string at the top of main screen and in status bar.

Security schema might be blocked even if it is not being edited. This may occur if the last editing operation wasn't properly completed (i.e. due to disconnection from the server).
When user who blocked a schema will connect the server again, the security schema automatically unlocks and all unsaved changes made by this user are lost.
There is also a special function that targets the blocking issue - security schema unblock.

**Warning!**

Security schema can be unblocked only by Superuser.

**To unblock security schema**,
in the Main Menu click **Security Schema > Unlock**.
All unsaved changes will be lost.

### 6.4.2.5 Updating Security Schema

The system can be simultaneously operated by multiple users. To keep security schema details in Management Console (DM) up-to-date, run updates regularly. The schema update security is automatically (in the process of connecting to the server) or manually (when working with the Microsoft Management Console).

You might need to upgrade your security schema in the following cases:

- registering a new workstation;
- registering an unknown employee;
- modifying your security schema.

**To update security schema manually, do one of the following**:

- select **View > Refresh** in the Main Menu;
- click **Update** in Toolbar.

### 6.4.2.6 Exporting/Importing Security Schema

You might need to save existing settings of a security schema. You might want to do this, if you reinstall your operating system or InfoWatch Device Monitor.
Exporting security schema saves to XML file the current version of a security schema including:

- security policies (DM) with sets of rules (DM);
- employee groups
- workstation groups
- device white lists
- signature categories.

You can import your saved settings into new security schema later.
**To export security schema**:

1. In the Main Menu select **Security Schema > Export**.
2. In the next dialog, enter a name of the XML file where your data will be exported and specify a directory for the file. After choosing the file name and directory click **Save**.

**To import security schema**:

1. In the Main Menu select **Security Schema > Import**.
2. In the next dialog choose the XML file that contains security policies (DM) and sets of rules (DM) and click **Open**.

This imports saved security schema settings into the active security schema. If your current security schema contains items with similar names, the system will add **1** to each imported name.

## 6.4.3 Security Schema Setup

After system installation, you must configure your security schema. Security schema is configured as follows:

1. Configure "*Default*" employee group and "*Default*" workstation group.
2. Configuring the rest of security settings.

Security schema configuration principles:

- Security policy (DM) must be created before you create an employee group or workstation group the policy (DM) will be assigned to.
- It is recommended that you assign an individual security policy (DM) for each employee group and workstation group.
- Each security policy (DM) assigned to a group must have a specific set of rules (DM).

**Adding workstations to security schema**
There are two ways to add a managed workstation:

- add a new workstation automatically during registration;
- add workstation manually via Management Console (DM).

In case of automatic registration a workstation is added to "*Default*" group. Later you can move it to other groups.
If you add it manually, you can select the group immediately.

**Adding employee accounts to security schema**
You can add new account information manually or automatically. You can register a new employee while editing your security schema. However, if an unknown employee is registered on a workstation, the account will automatically be added to security schema ("*Default*" employee group).

**Adding white lists to security schema**
Before you create a white list, add device models and instances to the database. Then devices white list is created for a specific employee/employee group/workstation/workstation group. These employees/workstations have access to whitelisted device models and instances regardless the policy (DM). When a white list record expires, access rights are distributed according to the policies (DM).
Security schema configuration details are available in the following subsections:

- Security Policies (DM);
- Rules (DM);
- Workstations;
- Employees;
- White Lists;
- Signatures;

- Temporary Employee Access to Network;
- Temporary Employee Access to Devices;
- Awaiting Editing Ends. Unlocking Security Schema.

## 6.4.3.1 Security Policies (DM)

> **Note:**
>
> For security policy (DM) configuration guidelines see "Security Policies (DM) and Rules (DM)".

Each security policy (DM) is a set of rules (DM) that define employees' level of access to controlled files and devices.
Security policies (DM) are assigned to **employee groups** and **workstation groups**. Security policy (DM) of employee group affects all the employees included to this group. Security policy (DM) of workstation group affects all the employees which work at managed workstations included to this workstation group.
Security policies (DM) are managed in Policies section. To go to this section, click **Policies** button in Navigation pane or select in Main Menu **Go > Policies**.
For security policy (DM) managing guidelines see:

- Viewing Security Policies (DM);
- Adding and Configuring New Security Policy (DM);
- Edit Security Policy (DM);
- Deleting Security Policy (DM).

### 6.4.3.1.1 Viewing Security Policies (DM)

**Policies** area of Navigation pane displays a list of security schema policies (DM). Main screen workspace displays a list of security policy (DM) rules (DM).

> **Note:**
>
> Use additional options to adjust list display (see "Additional Features").

**To view security policy rules**,
select security policy (DM) name in **Policies** area of Navigation pane.
Rules are displayed in a form of a table where each row contains a rule. Columns contain general rule properties. Each rule (DM) has an icon depicting the rule's (DM) coverage and a color mark depicting if a rule (DM) is an allowing one (green), forbidding (red) or partially restricting (yellow).
Extended information on each rule (DM) is displayed on **Details** panel.

**To view all rule properties**,
select the row that contains the rule (DM) name in the main screen workspace.
This opens a table containing rule (DM) information on **Details** panel.

General information:

- **Name**. Rule (DM) name.
- **Policy**. Name of security policy (DM) that contains the rule (DM).

- **Interceptor**. Interceptor type assigned to the rule (DM).
- **Operation**. Operation, controlled by the rule (DM).
- **Period**. Rule starting and expiry time.

Application Monitor rules feature additional details:

- **White Lists**. White list of applications mentioned in the rule (DM).
- **Black Lists**. Black list of applications mentioned in the rule (DM).

Clipboard Monitor rules feature additional details:

- **Within the same application**. Indicates that data paste within the same application triggers the rule.
- **To applications of termanal session**. Indicates that data paste to applications of terminal session triggers the rule.

Cloud Storage Monitor rules feature additional details:

- **Google drive**.Shows current access type.
- **DropBox**. Shows current access type.
- **YandexDisk**. Shows current access type.
- **OneDrive**. Shows current access type.
- **EverNote**. Shows current access type.
- **SugarSync**. Shows current access type.

File Monitor rules feature additional details:

- **Exclude from interception**. Indicates if files corresponding to mask or category won't be proceeded.
- **Use file mask**. File mask attribute.
- **File mask**. Mask that selects the files covered by the rule (DM).
- **Use category**. Attribute of file filtering against signature categories (see "Signatures").
- **Category**. Signature category for file formats selection.
- **Create shadow copy**. Stored files shadow copying attribute.
- **Limit by minimum file size**. Attribute of minimum size restriction for shadow copied file.
- **Minimum file size**. Lower limit of file size.
- **Limit maximum file size**. Attribute of maximum size restriction for shadow copied file.
- **Maximum file size**. Upper limit of file size.

Print Monitor rules feature additional details:

- **Use task mask**. Task mask attribute.
- **Task mask**. Mask for selecting print jobs covered by the rule (DM).
- **Use process mask**. Process mask attribute.
- **Process mask**. Mask of the process that initiated a print job.
- **Create shadow copy**. Printed document shadow copy attribute.

Device Monitor rules feature additional details:

- **Allow only for encrypted devices**. Action will be allowed, if the media is protected by supported encryption software.

IM Client Monitor rules feature additional details:

- **Create call shadow copy**. Indicates if a shadow copy of voice Skype traffic should be created.
- **Create file shadow copy**. Indicates if a shadow copy of sending files should be created.
- **Minimum file size**. Lower limit of file size.
- **Maximum file size**. Upper limit of file size.
- **Maximum call size**. Length of call (in minutes) which should be saved in one shadow copy file.

Ftp Monitor rules feature additional details:

- **Create shadow copy**. Indicates if a shadow copy of FTP/FTPS-sent file should be created.
- **Minimum file size**. Lower limit of file size.
- **Maximum file size**. Upper limit of file size.

HTTPS Monitor rules feature additional details:

- **Do not create a shadow copy of traffic of internal resources**. Does not intercept objects sent within internal resources.
- **Create shadow request copy**. Value of document shadow copy sent by HTTPS.
- **Minimum request size, Bytes** . Lower limit of file size.
- **Maximum request size, Mbytes**. Upper limit of file size.
- **Transferred via**. Indicates whether encrypted or any other traffic is being intercepted.

Network Monitor rules feature additional details:

- **Access**. Always has value "*Forbidden connections out of corporate network*".

Mail Monitor rules feature additional details:

- **Transferred via**. Indicates whether encrypted or any other traffic is being intercepted.
- **Maximum mail size, Mbytes**. Maximum mail size.

ScreenShot Control Monitor rules feature additional details:

- **Forbid an employee to make screensho**ts. Any screenshots or when particular application run only.

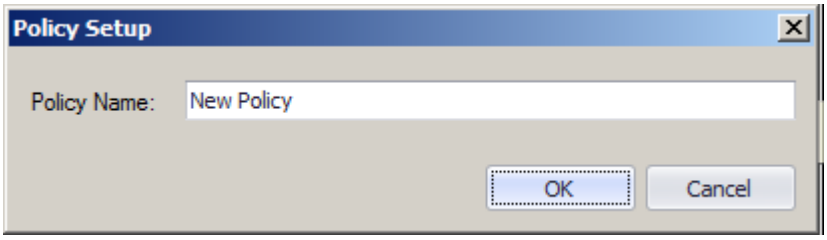
> **Note:**
> Information retrieved from some attributes is duplicated in the main screen workspace.

### 6.4.3.1.2 Adding and Configuring New Security Policy (DM)

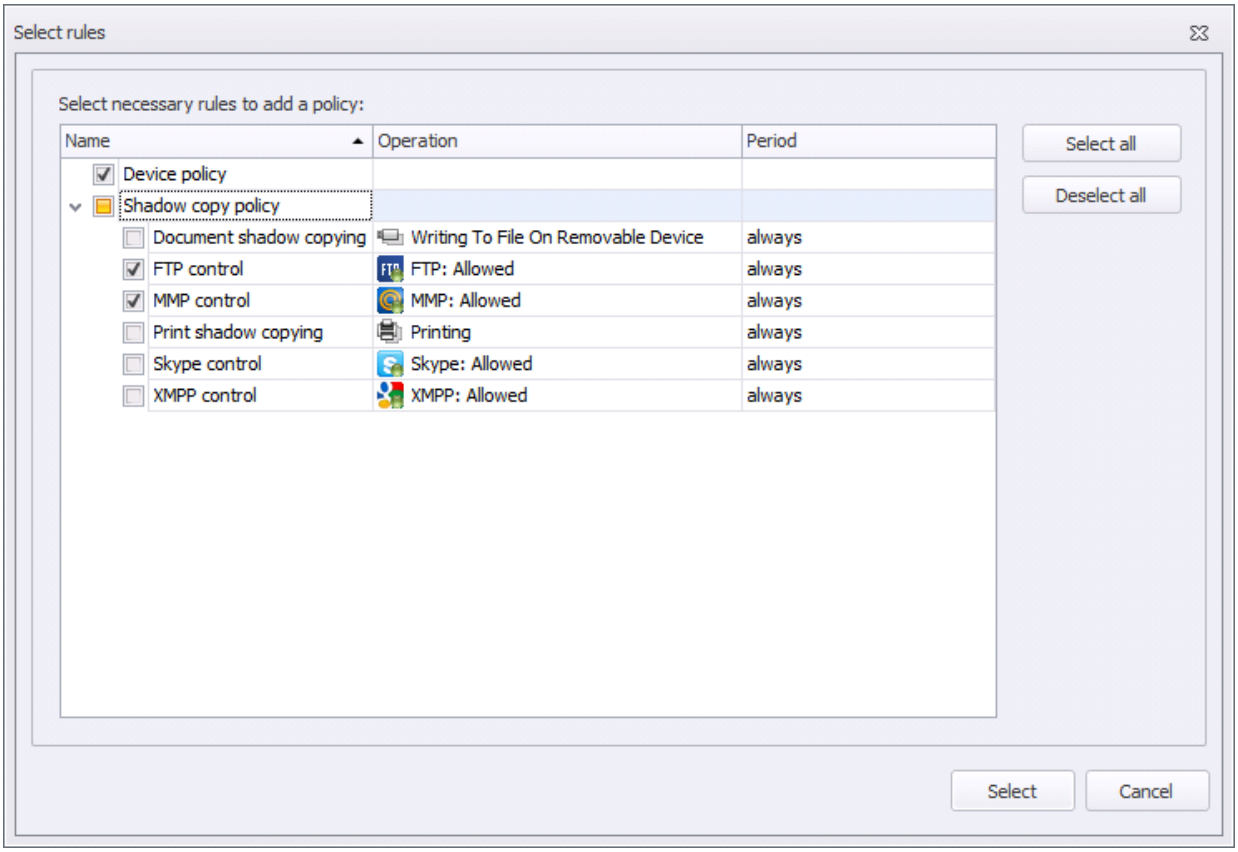
**To create and configure security policy:**

1. Go to **Policies**.
2. Take one of the following steps:
    - click **Create Policy** at the top of Navigation panel;

- in Main Menu select **Edit > Create Policy**.
- Use **Ctrl+N** shortcut on a keyboard.
  This opens **Create policy** dialog.




3. In **Name field**, enter new security policy (DM) name. Maximum length is 64 characters.
4. Make a list of rules (DM) for new security policy (DM):
   - To copy rule (DM) from another policy (DM) click **Select rules**. In new dialog flag the rules (DM) you want to copy to a new security policy (DM).




   You can also select the whole policy (DM) - then all rules (DM) it contains will be added to a new security policy (DM).
   After you mark all rules (DM) click **Select**.
   - To create a new rule (DM) click **Create** and specify rule (DM) parameters as described:
     - Configuring Application Monitor Rule (DM);
     - Configuring Clipboard Monitor Rule;

- Configuring Cloud Storage Monitor Rule (DM);
- Configuring Device Monitor Rule (DM);
- Configuring File Monitor Rule (DM);
- Configuring FTP Monitor Rule (DM);
- Configuring HTTPS Monitor Rule (DM);
- Configuring IM Client Monitor Rule (DM);
- Configuring Mail Monitor Rule (DM);
- Configuring Network Monitor Rule (DM);
- Configuring Photo Monitor Rule (DM);
- Configuring Print Monitor Rule (DM);
- Configuring ScreenShot Control Monitor Rule (DM);
- Configuring ScreenShot Monitor Rule (DM).

You can also edit or delete policy (DM) rule (DM) by selecting it and clicking **Edit** or **Delete** appropriately.

5. When all rules (DM) to be included to policy (DM) are defined, click **Save**.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

Later you will be able to edit or remove security policies (DM): (see "Editing Security Policy", "Removing Security Policy"), as well as their rules (DM) (see "Adding a Rule (DM)", "Editing a Rule (DM)", "Deleting a Rule (DM)", "Copying a Rule (DM)").

### 6.4.3.1.3 Edit Security Policy (DM)

**To edit security policy (DM):**

1. Go to **Policies**.
2. In **Policies** area of Navigation pane select security policy (DM) name.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Edit Policy**;
   - click  **Edit Policy** at the top of Navigation pane;
   - use **Ctrl+E** shortcut;
   - double-click selected security policy (DM) name.

   These actions open **Edit Policy** dialog.
4. In this dialog, edit security policy (DM) name by entering a new one in **Name** field.

5. Click **OK**.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

#### 6.4.3.1.4 Deleting Security Policy (DM)

> **Warning!**
>
> The policy (DM) appointed at least one employee group or workstation groups, cannot be deleted. To delete security policy (DM) make sure that this policy (DM) is not apointed to any employee group (see "Viewing Employee Details") or workstation group (see "Viewing Workstation Details").

**To delete security policy**:

1. Go to **Policies**.
2. In **Policies** area of Navigation pane select security policy (DM) name.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Delete Policy**
   - click  **Delete Policy** at the top of Navigation pane.
   - Use **Ctrl+D** shortcut.
4. In the following confirmation dialog select **Yes** to confirm that you want to remove security policy (DM).

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.2 Rules (DM)

Rules (DM) are used basing on the security policy (DM) they are assigned to. Each security policy (DM) has individual set of rules (DM). Information on rules (DM) is available in the following subsections:

- Rules Application (DM);
- Adding a Rule (DM);
- Editing a Rule (DM);
- Deleting a Rule (DM);
- Copying a Rule (DM).

#### 6.4.3.2.1 Rules Application (DM)

To make a set of rules (DM) effective, keep in mind all possible instances of their application.
The event is considered as satisfying the rule (DM) if it meets all rule (DM) parameters (for example both event time is within rule (DM) time period and a size of outgoing document is not less than minimal file size and so on).
If the event meets several rules (DM) at the same time, then in general more limiting rule overrides the permissive one. In details:

1. The excluding rule (DM) (Exclude from interception option is selected: see "Configuring File Monitor Rule (DM)") has a highest priority.
2. The forbidding rule (DM) overrides the permitting one. For example, Device Monitor rule (DM) (see "Configuring Device Monitor Rule (DM)") with No access limitation overrides rule which permits Read only, and the last one overrides a rule (DM) with Full access to encrypting devices. Also FTP Monitor rule (DM) (see "Configuring FTP Monitor Rule (DM)") with Forbid using FTP-protocol is applied instead of rule (DM) with Full access to encrypting devices, and the last one - instead of rule with Permit using FTP-protocol. And so on.
3. The rule creating shadow copies (Create a shadow copy option is selected) overrides a rule without shadow copying.
4. For IM Client Monitor rules (DM) which make a copy of voice traffic (Create voice copy option is selected: see "Configuring IM Client Monitor Rule (DM)"), the rule (DM) which has a constraint of lesser recording duration overrides a rule (DM) with longer recording duration.

Other important information on rules (DM) application:

- Device Monitor Rules Application;
- Creating Shadow Copies and Blocking Operations Due to Free Space Shortage.

##### 6.4.3.2.1.1 DEVICE MONITOR RULES (DM) APPLICATION

Access to all Device Monitor interceptor controlled peripherals is a collection of rules (DM) assigned to each device.
Employee access rights are defined basing on:

- rules (DM) applied to employee groups which an employee is included in;
- rules (DM) applied to workstation groups of the workstation using for device access;
- white lists.

During Client installation controlled are fully accessible by default. Therefore, all forbidden operations with the device must be set explicitly (i.e., in form of a rule (DM)).
Initially, each new registered workstation is added to the Default group. This group has a "Shadow copy policy" (DM) which contains no rules (DM). Device rules (DM) are nor applied to default employees. Thus, the System always allows access to all managed workstations after installation.

**For example**:
There is a rule (DM) that lets workstation group A write to CD/DVD drive. Workstation WS belongs only to workstation group A. Employee Smith belongs only to employee group B with no device rules (DM). Employee Smith tries to view a CD on workstation WS. In this case, employee won't be able to view CD contents of a disk and write new data.
You can assign multiple rules (DM), in several policies (DM) either, with various access levels to the same device. This causes rule (DM) conflict. General conflict resolution principle: higher limit means higher priority (see the table for further details).

| Device type | All devices, except CD/DVD, Floppy drives and removable storage devices | CD/DVD | Floppy drives and removable storage devices |
|---|---|---|---|
| Access in descending order of priority | Banned from use | 1. No access<br>2. Read-only | 1. No access<br>2. Read-only<br>3. Full access to the encrypted devices only |

**Examples**:

**Example 1**. There is a rule (DM) for workstation group C that forbids an access to removable storage device. There is a rule (DM) in employee group D policy (DM) that allows access to removable storage devices in read only mode. Employee Smith belongs to employee group D and tries to access removable storage device from workstation that belongs to workstation group C. Conflict is resolved in favor of more restrictive rule (DM), i.e. employee Smith cannot read from removable storage device.
**Example 2**. There is a rule (DM) in employee group E policy (DM) that allows read-only access to removable storage device. There is a rule (DM) in employee group F that grants a full access only to encrypted removable storage devices. Employee Smith belongs to both groups. Conflict is resolved in favor of the more restrictive rule (DM): i.e. employee Smith can get a read-only access: both encrypted and not encrypted (less priority rule (DM) is not applied at all).

Rules (DM) for certain controlled device types may overlap (see the table). These rules (DM) should also be considered when banning access to controlled devices.

**Note:**

A list of controlled devices types and a set of matching operations is provided in "Configuring Device Monitor Rule (DM)".

| Rule (DM) | Overlapping rules | Notes |
|---|---|---|
| Floppy | No | |
| CD/DVD | No | |
| Parallel port (LPT) | Local printer (LPT)<br>Imaging devices (LPT) | If there is no access to LPT port, the device connected to this port will be unavailable |
| Serial port (COM) | Modem<br>Local printer (COM)<br>Imaging devices (COM) | A modem connected to COM port is only accessed basing on COM port rule<br>If there is no access to COM port, the device connected to this port will be unavailable |
| Removable Storage (USB and IEEE 1394 devices) | FireWire (IEEE 1394) | If there is no access to FireWire (IEEE 1394) port, the device connected to this port will be unavailable |
| Local Printer (with USB, IEEE 1394, SCSI connection, etc.) | FireWire (IEEE 1394)<br>Serial port (COM)<br>Parallel port (LPT) | If there is no access to FireWire (IEEE 1394), COM, LPT port, the device connected to this port will be unavailable |

| Rule (DM) | Overlapping rules | Notes |
|---|---|---|
| Image-processing Devices (cameras, scanners) | FireWire (IEEE 1394)<br>Serial port (COM)<br>Parallel port (LPT) | If there is no access to FireWire (IEEE 1394), COM, LPT port, the device connected to this port will be unavailable |
| Bluetooth Device | No | |
| IrDA Device | No | |
| Other USB Devices | No | |
| FireWire | Removable storage device (IEEE 1394)<br>Local printer (IEEE 1394)<br>Imaging devices (IEEE 1394) | If there is no access to FireWire (IEEE 1394) port, the device connected to this port will be unavailable |
| Modem | Serial port (COM) | Modem access rules do not affect modems connected to COM port.<br>A modem connected to COM port is only accessed basing on COM port rule |
| Smart Card Reader | No | |
| Tape Device | No | |
| Multifunctional Device | No | |
| PCMCI device | No | |
| USB Network Adapter | No | |
| Pocket Computer (Windows Mobile and Palm OS pocket computers) | No | |

#### 6.4.3.2.1.2 CREATING SHADOW COPIES AND BLOCKING OPERATIONS DUE TO FREE SPACE SHORTAGE

**Shadow copy of a file, document, message or chat** is created when all conditions are met:

1. Applied rule rule (DM) creates shadow copies and file size meets the requirements.
2. Free space at managed workstation is more then minimum size required by the policy (DM) (see "Common Settings for Clients", **Free clients' disk space** setting, default value is 10%).
3. Managed workstation has more free space then shadow copy creation requires.

**Warning!**

If there is at least one valid rule (DM) that enables shadow copying, and there is less free space available on the workstation than required for file saving, then the controlled operation will be performed without shadow copy creation. Such an event will be displayed in a Management Console (DM) (see "Viewing Events") with "*Error of copy creating*" state.

Besides shadow copies, managed workstation temporary (until the connection with Device Monitor Server is established) stores information about events. For this purpose the drive where Device Monitor Client is installed has dedicated space for storing up to 30000 events (about 300 MB). If:

- Device Monitor Client did not have connections with Device Monitor Server so that there is stored more than 30000 events controlled by rules (DM) defined for employee/workstation
  and
- in common settings for clients the **If there is not enough disk space to save shadow copy, the operation will** parameter has Operation is blocked value,

then **any employee's actions controlled by security schema will be blocked**.

#### 6.4.3.2.2 Adding a Rule (DM)

To add a rule to security policy:

1. Go to **Policies**.
2. In **Policy** area of Navigation pane select the name of the security policy (DM) you want to add the rule (DM) to.
3. Take one of the following steps
   - in Main Menu click **Edit > Create Rule**;
   - click **Create Rule** in the top of **Policies area**;
   - right-click in **Policies** area and select **Create Rule** from the drop-down list;
   - use **Ctrl+Shift+N** shortcut.
4. Specify the interceptor rule (DM):
   - Configuring Application Monitor Rule (DM)
   - Configuring Clipboard Monitor Rule (DM)
   - Configuring Cloud Storage Monitor Rule (DM)
   - Configuring Device Monitor Rule (DM)
   - Configuring File Monitor Rule (DM)
   - Configuring FTP Monitor Rule (DM)
   - Configuring HTTPS Monitor Rule (DM)
   - Configuring IM Client Monitor Rule (DM)
   - Configuring Mail Monitor Rule (DM)
   - Configuring Network Monitor Rule (DM)
   - Configuring Photo Monitor Rule (DM)

- Configuring Print Monitor Rule (DM)
- Configuring ScreenShot Control Monitor Rule (DM)
- Configuring ScreenShot Monitor Rule (DM)

5. After you have set all necessary parameters, click **OK** in rule (DM) settings.

**Warning!**

To apply changes you have to save current security scheme (see "Editing Security Scheme"). If you don't save the security scheme, all changes will be discarded.

#### 6.4.3.2.2.1 CONFIGURING APPLICATION MONITOR RULE (DM)

An employee can perform actions which can lead to the leakage of confidential information throught third-party applications installed on a Workstation and not controlled by InfoWatch Device Monitor.

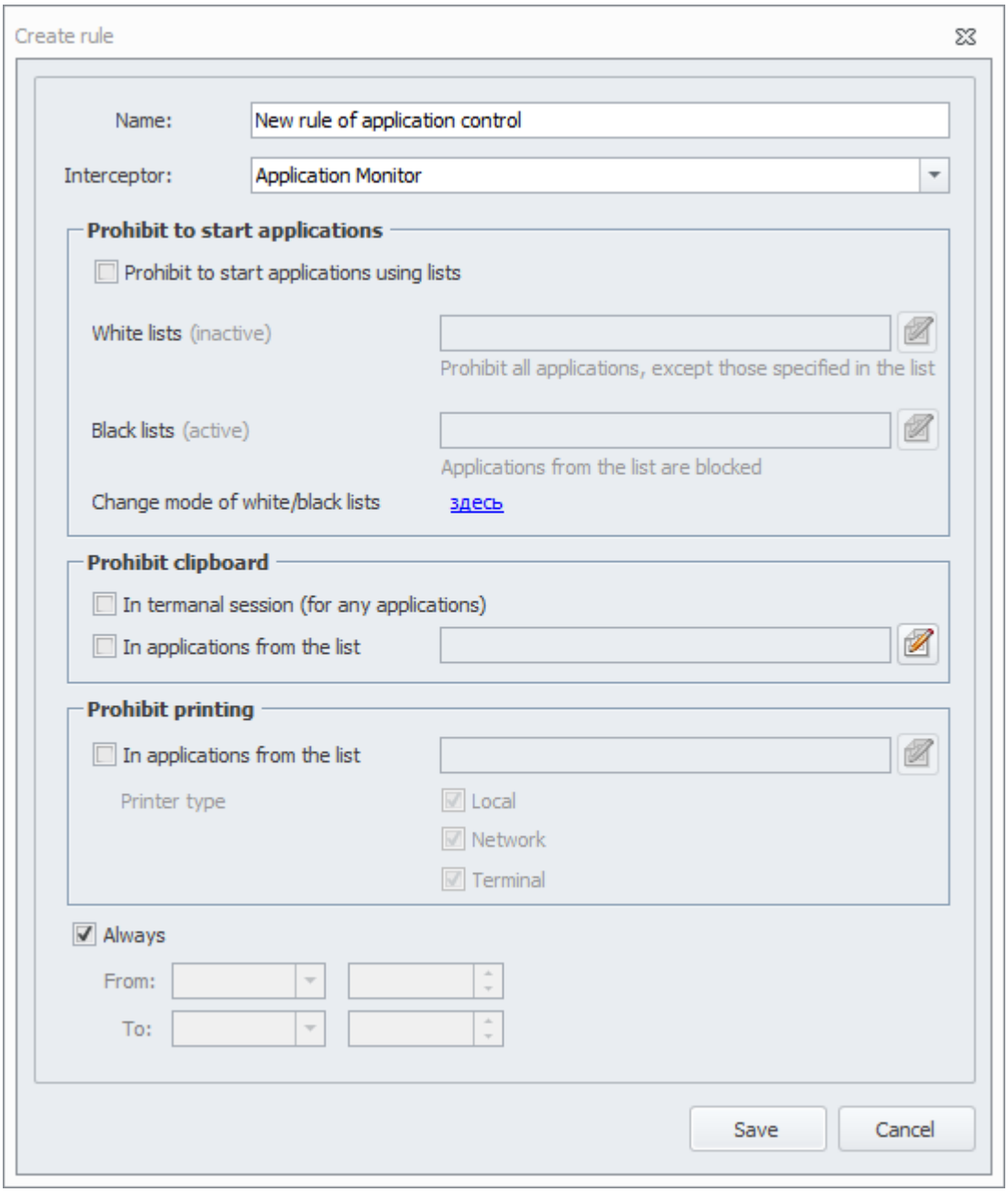
Application Monitor interceptor allows to controll employees' access to applications through ban of:

- appliaction start;
- clipboard;
- print.

The above bans can be activated both separately and together.

**Note:**

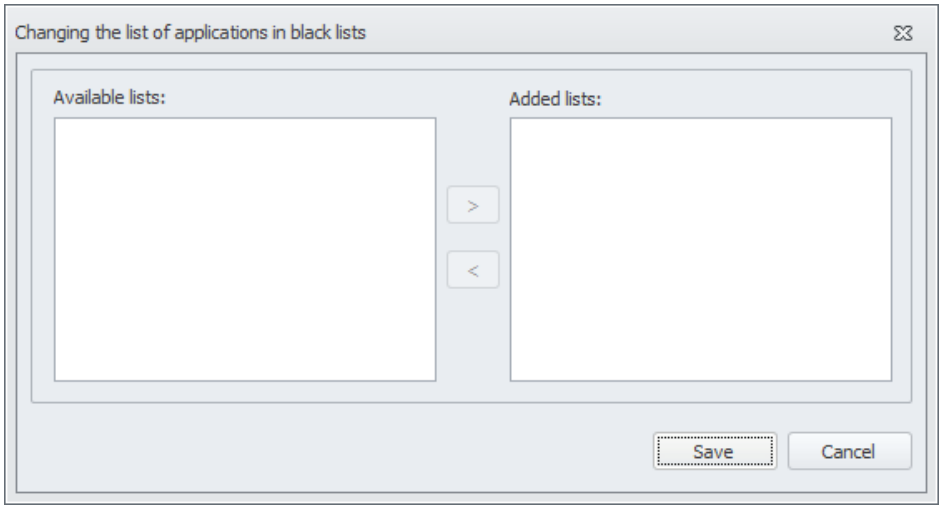
To switch between active black and white application lists, press link here.




**To configure the rule, perform the following steps:**

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In Create rule (DM) dialog in **Interceptor** field select **Application Monitor**.
5. Enter rule (DM) name to **Name field**.

6. In **Prohibit to start applications** block add white and black applications lists by clicking .




> **Note:**
> On application list formation see "Application protocol".

7. In the opened window choose necessecary types of availables lists and move them to Added lists area by pressing >.
8. Click **Save**.
9. In **Prohibit to start applications** block check the boxes in front of groups of applications that should not be allowed to copy the data:
   - In terminal session (for any applications);
   - In applications from list (add lists by clicking ).

   Upon

> **Warning!**
> Upon ban clipboard is blocked completely for all data types without separation of copy/paste, regardless of the black/white list mode.

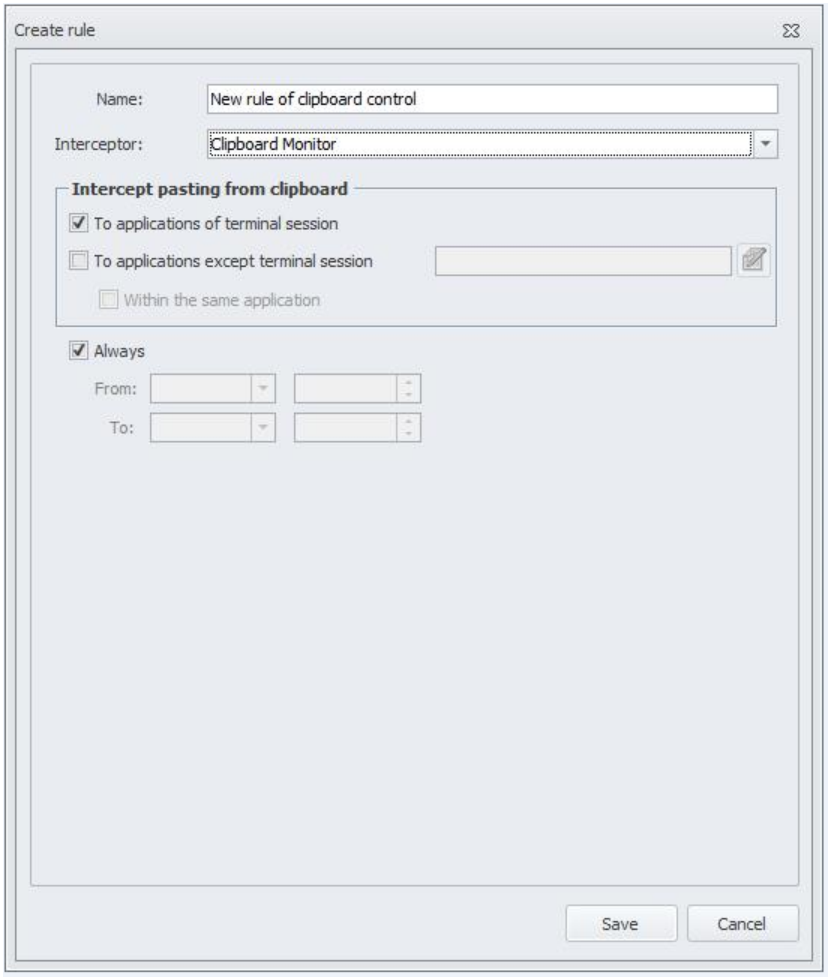
10. In **Prohibit printing** block specify applications, which are banned from printing as well as printer type:
    - Local;
    - Network;
    - Terminal.

User cannot send to print data in specified applications. He will also have no access to chosen printers.

11. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and To fields.
12. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.2 CONFIGURING CLIPBOARD MONITOR RULE (DM)

The Clipboard Monitor interceptor allows you to control access of employees to the clipboard.




**To configure the rule, perform the following steps**:

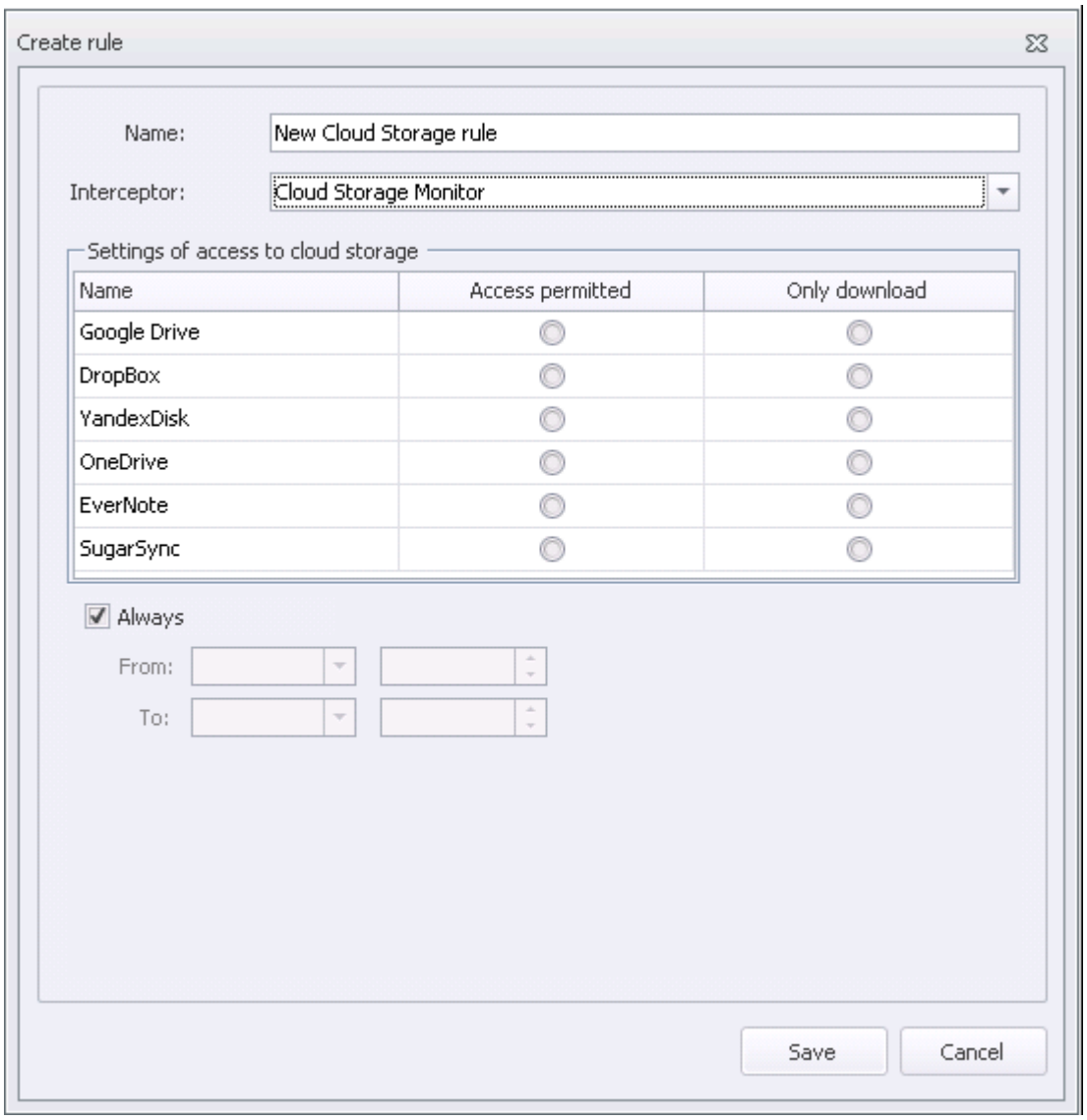
1. Go to **Policies** section.
2. In **Policies** area at Navigation pane, select a security policy (DM) to which you want to add a rule (DM).
3. Do either of the following:
   - in the main menu, select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in the **Interceptor** field, select **Clipboard Monitor**.
5. Enter rule (DM) name to **Name** field.

6. In **Intercept pasting from clipboard** area, define in which case the rule (DM) will trigger:
    - **To applications of terminal session**. If the option is selected, then the rule (DM) will trigger when data is pasted to applications of a terminal session. Pasting data within a terminal session does not trigger the rule.
    - **To applications except terminal session**. If the option is selected, then the rule (DM) will trigger only when data is pasted to specified applications. To choose applications, click  button (see "Application protocol"). The rule also applies to data copied from a terminal session
      If you need the rule to be trigger when data is pasted to the application from which it has been copied, select the **Within the same application** option.
7. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify the rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
8. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.3 CONFIGURING CLOUD STORAGE MONITOR RULE (DM)

**Cloud Storage Monitor** interceptor provides web-client control. One can manage the following cloud storages:

| Storage name | Restriction options |
|---|---|
| Google Drive | Access Denied/Only download |
| DropBox | Access Denied/Only download |
| YandexDisk | Access Denied/Only download |
| OneDrive | Access Denied/Only download |
| EverNote | Access Denied/Only download |
| SugarSync | Access Denied/Only download |




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select Create rule from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Cloud Storage Monitor**.
5. Enter rule (DM) name to **Name** field.
6. In **Setting of access to cloud storage** mark the option for access limitation (see table above).

7. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
8. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.4 CONFIGURING DEVICE MONITOR RULE (DM)

**Device Monitor** interceptor allows you to control employee access to peripheral devices and the devices connected to the thin and thick terminal clients.
(see "Glossary").
**Control of terminal clients, which are connected to Device Monitor Client Workstation via Microsoft RDP or Citrix ICA can be useful in the following situation**:

1. Remote user connects to Device Monitor Workstation from terminal client.
2. There is a storage or a printer connected to terminal client.
3. Remote terminal client attempts to print out/copy data from Device Monitor Workstation (Terminal storage/printer should be connected to Device Monitor Workstation via Microsoft RDP or Citrix ICA in this case).

| Name | Behavior |
|---|---|
| Floppy | Full access to encrypted devices only / Read only / Access denied |
| CD/DVD | Read only / Access denied |
| LPT port | Denied |
| COM port | Denied |
| Portable disk drives (USB and IEEE 1394 devices) | Full access to encrypted devices only / Read only / Access denied |
| Local Printer (with USB, IEEE 1394, SCSI connection, etc.) | Denied |
| Image Editing Devices (cameras and scanners) | Denied |
| Bluetooth Device | Denied |
| IrDA Device | Denied |
| Other USB Devices | Denied |
| FireWire | Denied |
| Modem | Denied |
| Smart Card Reader | Denied |
| Tape Drive | Denied |
| Multifunctional Device | Denied |
| PCMCI device | Denied |

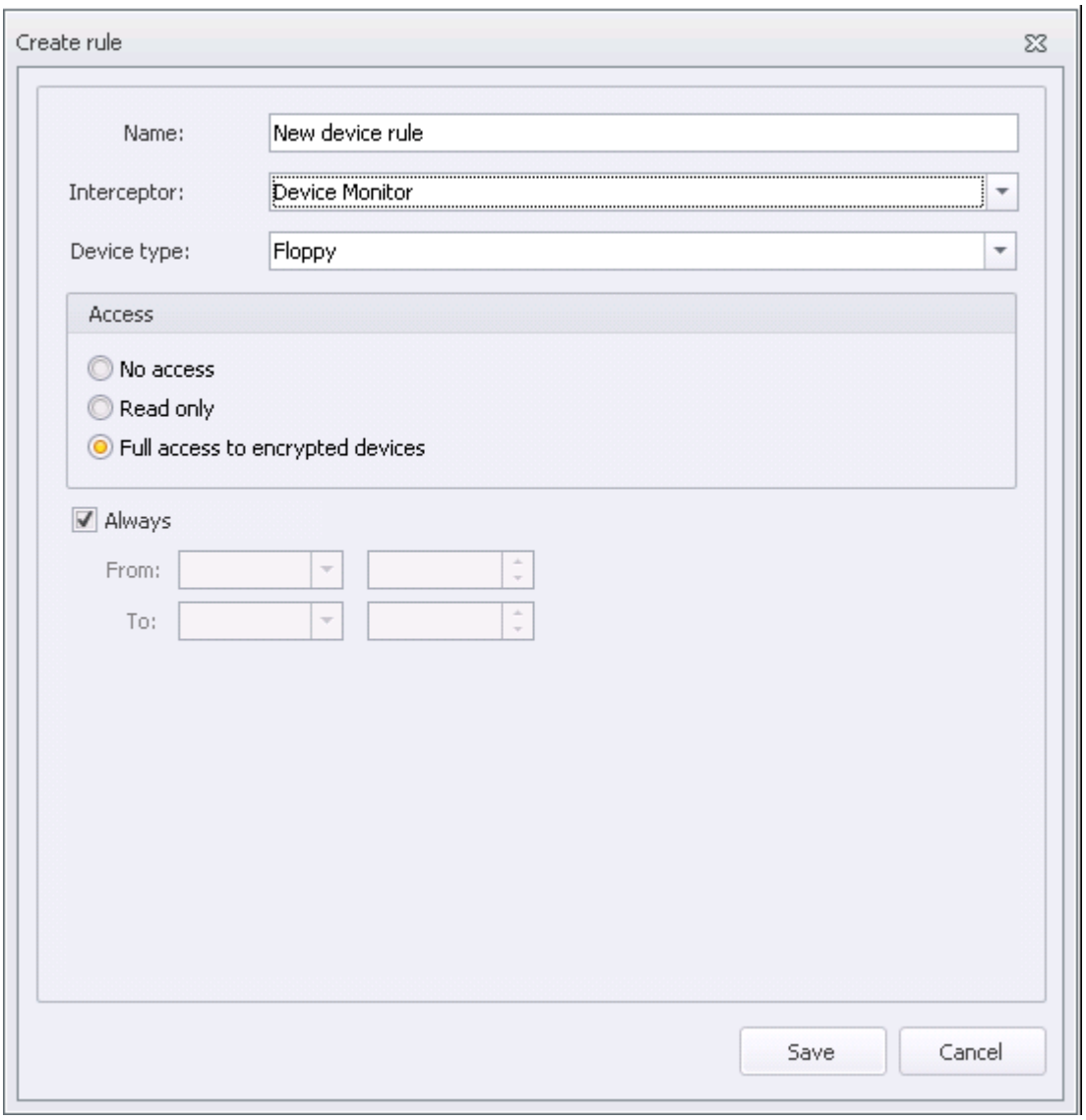
| Name | Behavior |
|---|---|
| USB Adapter | Denied |
| Pocket Computer (Windows Mobile and Palm OS pocket computers) | Denied |
| Network printer | Denied |
| **Microsoft RDP or Citrix ICA connection control** | |
| Terminal printer | Denied |
| Terminal storage | Read only/Access denied |
| Terminal port (thin client port) | Denied |
| Terminal Plug and Play devices | Denied |

**Note:**

nfoWatch Device Monitor supports devices encrypted by InfoWatch CryptoStorage SOHO 2.1, InfoWatch CryptoStorage Enterprise 1.0, Kaspersky KryptoStorage 1.0 and TrueCrypt 7.1.

**Warning!**

If event matches multiple rules (DM), see "Rules Application (DM)" and "Device Monitor Rules (DM) Application".




**To configure the rule, perform the following steps:**

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in **Interceptor** field select **Device Monitor**.
5. Enter rule (DM) name to **Name** field.
6. Select a peripheral type controlled by this rul (DM)e from **Device type** drop-down list.
7. In **Access** area select needed access level (see table above).

8. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
9. When all parameters are configured, click **Save**.

### 6.4.3.2.2.5 CONFIGURING FILE MONITOR RULE (DM)

File Monitor interceptor allows you to monitor the following operations: copying files to network resources and writing to the file on a removable device. The System registers only successful operations. With this rule, you can monitor the following actions of employees:

- Copying a file to network resources using UNC (for example, *Server**SharedFolder**Folder**File*)
- Copying or moving files to a removable device. The System monitor operation of copying/moving from a controlled computer, another removable device or a network resource

> **Note:**
>
> The following removable devices are supported:
>
> - devices connected via USB and IEEE 1394 ports (FireWire, i-Link)
> - floppy disk storage systems (floppy disk drive, ZIP drive)
> - optical disks (CD, DVD, BD) in Live File System mode
> - network volumes

- Creating a file directly on a removable device
- Editing a file directly on a removable device, including file renaming
- Copying a file to media devices connected via MTP

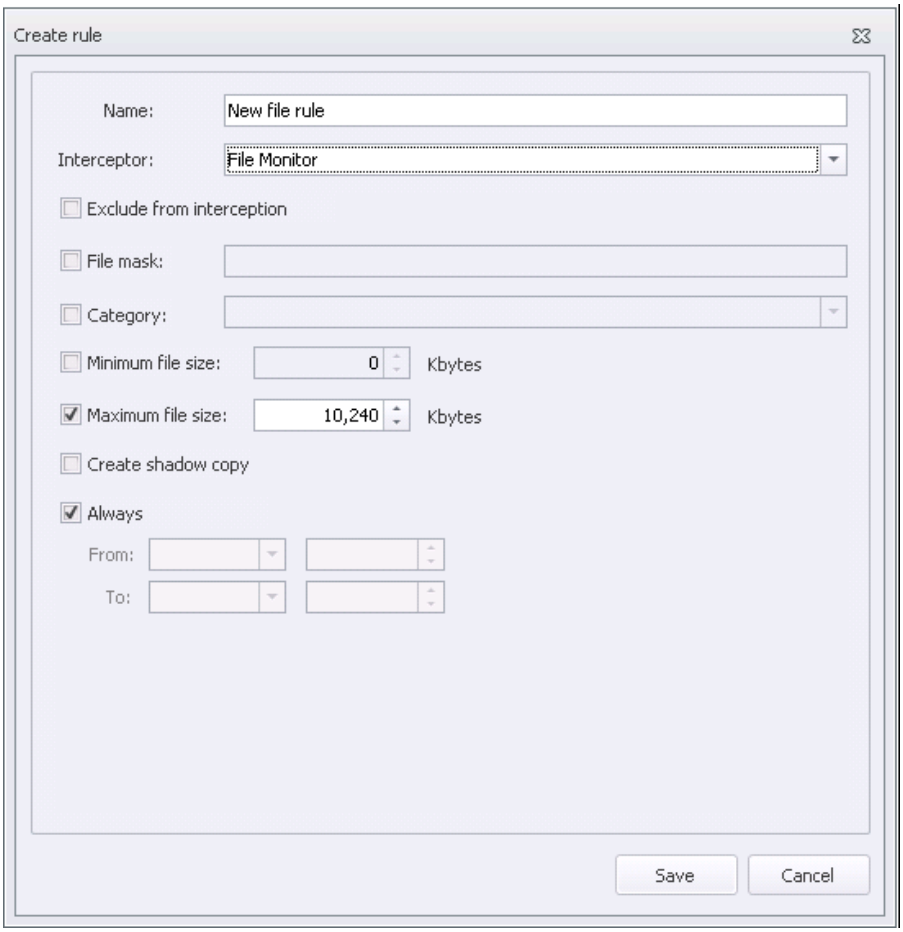
> **Note:**
>
> File renaming on media devices is not supported.

- Copying a file to a terminal session application
- Copying a file to resource connected via a terminal session (redirection for network folders and virtual devices is supported)

> **Warning!**
>
> The file is subject to **File Monitor** rule (DM) if all file parameters meet the rule (DM) conditions. For example, if the rule (DM) sets shadow copying and maximum and minimum file size are specified, then processed file should have a size within the specified range.

**Warning!**

Information about rule (DM) conflict resolving see in "Rules Application (DM)".




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane, select a security policy (DM) to which you want to add a rule.
3. Do either of the following:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in **Interceptor** field, select **File Monitor**.
5. Enter rule (DM) name to the **Name** field.
6. If you want to exclude specific files from interception, flag **Exclude from interception**. For operation satisfying this rule, no events or shadow copies will be created.

> **Warning!**
>
> If file record event is a subject of several rules (DM), the excluding rule (DM) has the highest priority.

7. You can constrain controlled files by mask. Flag **File mask** checkbox and specify a mask. You can use wildcard characters when specifying a file mask: «?» to replace a character or «*» to replace a character set. For example, *.doc. The space character is interpreted as a part of file name.

> **Warning!**
>
> There should be only one mask for one rule (DM). In case it is required to type in several masks, one should create a rule (DM) corresponding to mask.

8. You can constrain controlled files by signature category (see "Signatures"). Flag Category checkbox and select a category from a drop-down list: the rule (DM) will be applied to files with chosen signature type.
9. To control files by size, specify:
    - **Minimum File Size**. When checked, rule (DM) will be applied only to files larger or of the specified size.
    - **Maximum File Size**. When checked, rule (DM) will be applied only to files smaller or of the specified size.
10. If you want to create shadow copies of outgoing files and then analyze them in Traffic Monitor, flag **Create a shadow copy**.

> **Warning!**
>
> If there is at least one valid rule (DM) for File Monitor that enables shadow copying, and there is less free space at the hard drive than required by the policy (DM) (see "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), then file saving will be performed without shadow copy creating.

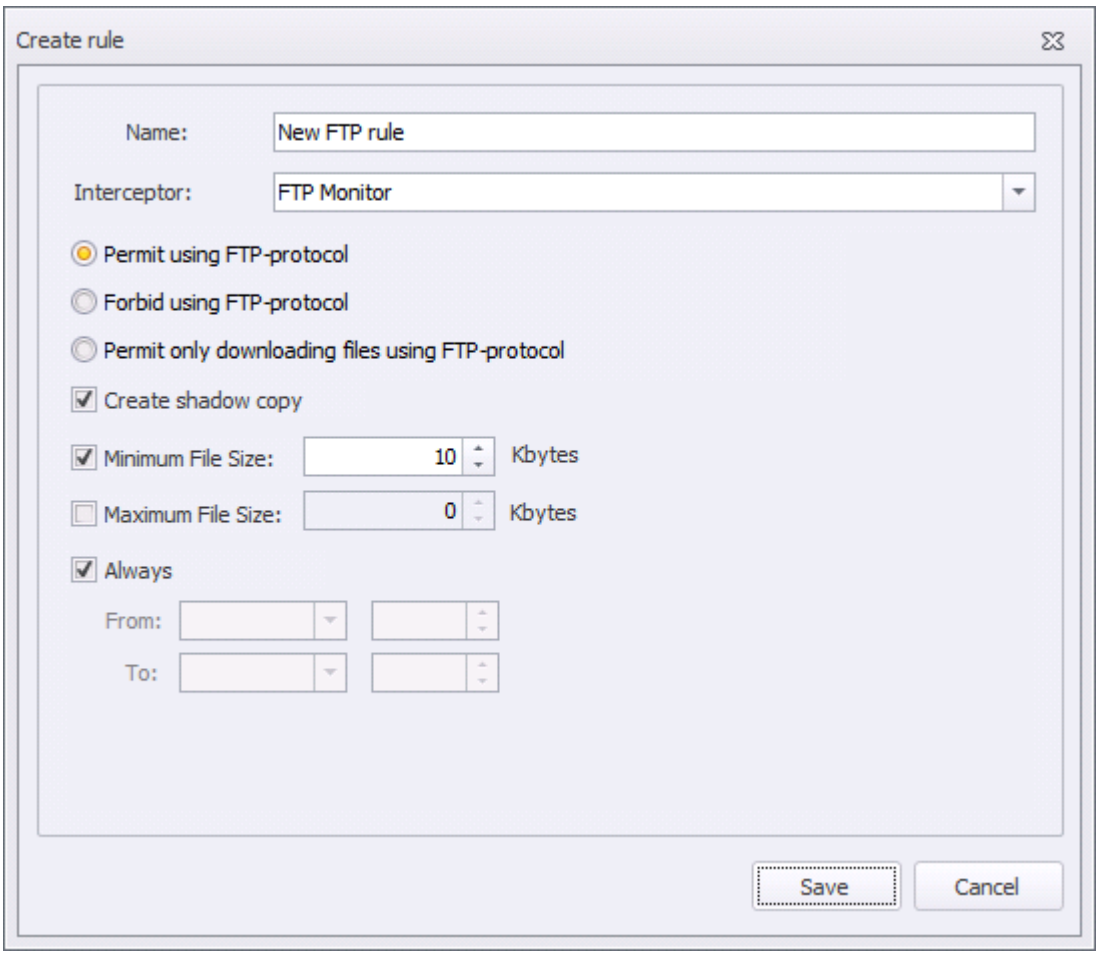
11. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in From and To fields.
12. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.6 CONFIGURING FTP MONITOR RULE (DM)

**FTP Monitor** interceptor lets to control data transfer through FTP/FTPS protocol.

> **Warning!**

The file is subject to **FTP Monitor** rule (DM) if **ALL** file parameters meet rule (DM) conditions **EXCEPT** maximum and minimum file size. **Maximum file size** and **Minimum file size** are taken into consideration only for shadow copying. So if file size is within specified range, then file transfer event will contain a shadow copy; otherwise event will be created without shadow copy.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Ftp Monitor**.
5. Enter rule (DM) name to **Name** field.
6. Select inspection level for data transfer through FTP/FTPS protocol:
   - **Permit using FTP-protocol**

- **Forbid using FTP-protocol**
- **Permit only downloading files using FTP-protocol**

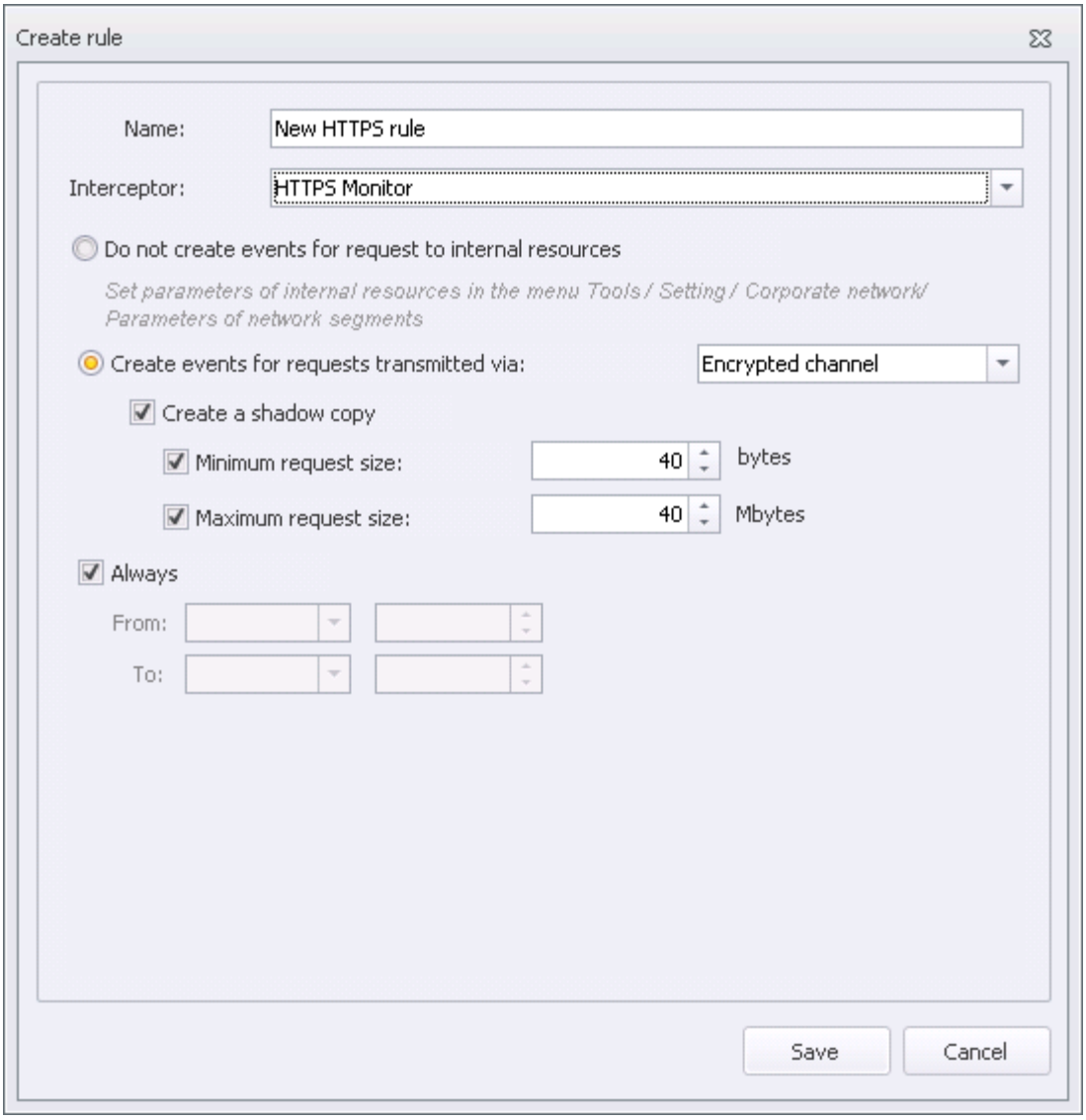
7. If you allowed using FTP/FTPS protocol then you can also configure creating of shadow copies of outgoing files. You can select **Create a shadow copy** check box and specify additional settings:
   - **Minimum File Size**. If the check box is selected, shadow copies will be enabled only for files of specified size or larger.
   - **Maximum File Size**. If the check box is selected, shadow copies will be enabled only for files of specified size or smaller.

> **Warning!**
>
> If FTP Monitor rule (DM) should create a shadow copy of file but there is less free system drive space left than required by the policy (DM) (see "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage") then shadow copies of messages still will be created but files will be sent without shadow copying.

8. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
9. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.7 CONFIGURING HTTPS MONITOR RULE (DM)

**HTTPS Monitor** interceptor lets to control data transfer through HTTP and HTTPS protocol.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **HTTPS Monitor**.
5. Enter rule (DM) name to **Name** field.
6. Specify the interception of internal resources queries. To do this in the **Do not create events for request to internal resources**:
   - mark the checkbox - if you don't need to intercept the query;

- unmark the checkbox - if you need to intercept the query.

7. To setup interception of HTTP, mark the checkbox **Create requests for events transmitted via**: pick **All Channels**. To setup interception of HTTPS, pick **Encrypted channel**.
8. Specify creating of the transferred files shadow copies. To do this mark the Create shadow copy checkbox. You can also define additional parameters for shadow copies:
   - **Minimum request size**. If the check box is selected, shadow copies will be enabled only for files of specified size or larger.
   - **Maximum request size**. If the check box is selected, shadow copies will be enabled only for files of specified size or smaller.

> **Warning!**
>
> In case there is not enough space available on a Workstation (see. "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), shadow copy will not be created.

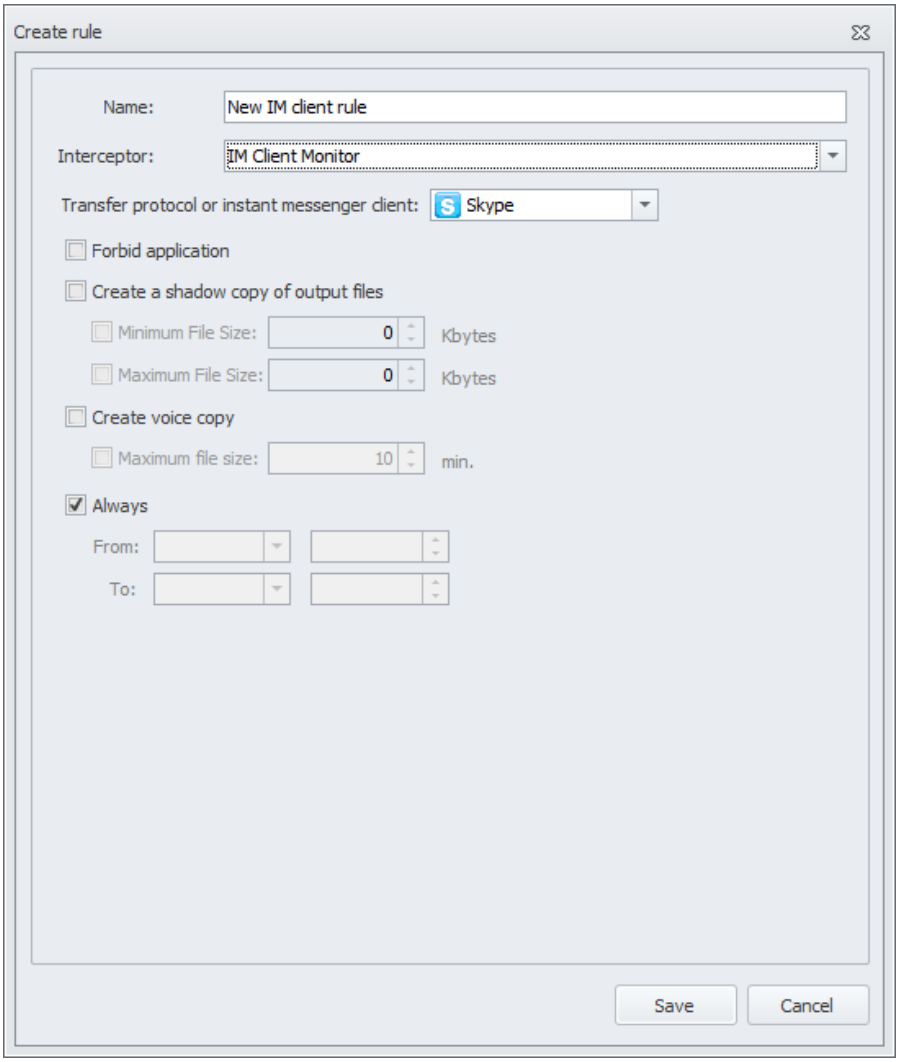
9. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
10. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.8 CONFIGURING IM CLIENT MONITOR RULE (DM)

**IM Client Monitor** interceptor lets to control employee access to instant messengers: Skype, Jabber (XMPP protocol), and Mail.Ru Agent (MMP protocol).

> **Warning!**
>
> IM Client Monitor interceptor global settings (employee request to launch the interceptor, configuring chat shadow copying period) are configured along with general security policies (DM): see "Network Traffic Control".

> **Warning!**
>
> The file is subject to **IM Client Monitor** rule if **ALL** file parameters meet rule (DM) conditions **EXCEPT** maximum and minimum file size. **Maximum file size** and **Minimum file size** are taken into consideration only for shadow copying. So if the file size is within a specified range, then a file transfer event will contain a shadow copy; otherwise, the event will be created without a shadow copy.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule (DM)** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **IM Client Monitor**.
5. Enter rule (DM) name in the **Name** field.
6. In **Transfer protocol or instant messenger client** field, select messenger type which is controlled by this rule (DM):
   - Skype - to control Skype usage;
   - XMPP - to control Jabber usage;

- MMP - to control Mail.Ru Agent usage;
- SMS - to control mobile devices usage;
- WhatsApp - to control WhatsApp usage on mobile devices.

7. In case it is required to intercept Skype voice messages, mark the **Create shadow copy of output files** checkbox and, if necessary, specify file size (sound file will be saved in *.ogg format)
   - If **Maximum File Size** box is checked, then several events with shadow copies will be created for talks, whose length exceeds the specified value.

> **Note:**
>
> Voice traffic is not supported for a mobile version.

8. In case you want to entirely ban using Client of this type, mark the **Forbid application** checkbox (not available for **SMS of mobile connection** and **WhatsApp**).

> **Note:**
>
> To Skype, the setting applies as follows: the interceptor checks if the application is started and, if yes, forcibly closes it. The check is performed every minute.

> **Warning!**
>
> To forbid using WhatsApp and Skype mobile version, use Application Monitor Rule (DM) (see "Configuring Application Monitor Rule (DM)")

9. If you want to create and transfer shadow copies of transferred files to Traffic Monitor, mark the **Create shadow copy of output file** checkbox. In this case, you will be able to define additional parameters for these copies:
   - **Minimum File Size**. When checked, shadow copying will only be performed for files larger or equal in size.
   - **Maximum File Size**. When checked, shadow copying will only be performed for files smaller or equal in size.

**Warning!**

Shadow copy of chats and messages are always created (regardless of **Create shadow copy** setting), in case there is at least one **IM Client Monitor** active rule (DM) on the computer.

The frequency of creating shadow copies from chats and messages (time period and the number of messages, which form a shadow copy) is described in the article "Network Traffic Control".

10. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
11. When all parameters are configured, click **Save**.

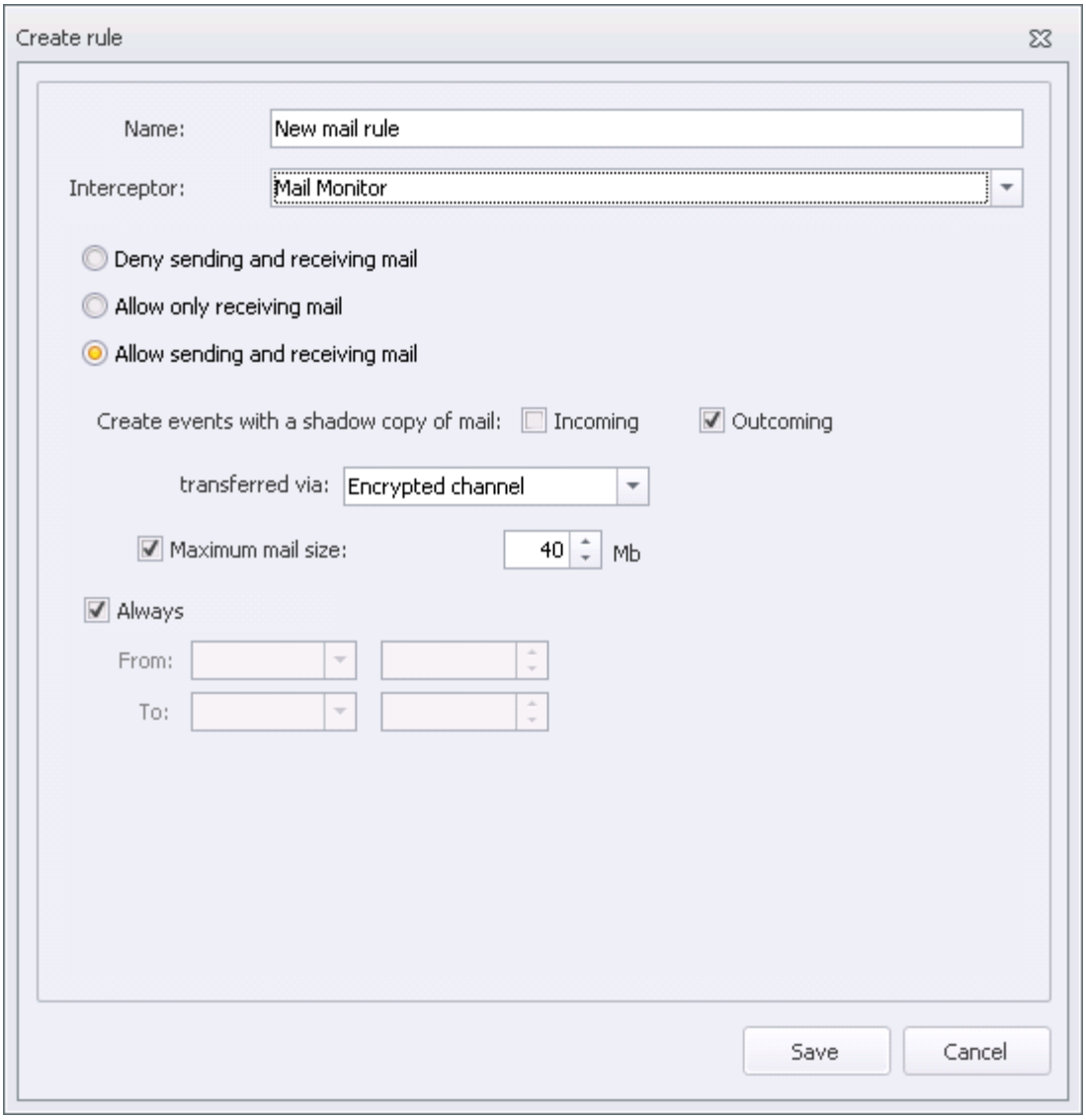
**Warning!**

In case shadow copy of message or chat must be created in accordance with an active IM Client Monitor rule (DM), but there is less free space on a computer, than it was defined by a policy (DM) (see "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), then shadow copies of the messages will be saved, but files will be transferred without shadow copy creation.

#### 6.4.3.2.2.9 CONFIGURING MAIL MONITOR RULE (DM)

**Mail Monitor** interceptor provides full control of incoming and outgoing e-mail.

Mail Monitor allows control of SMTP, IMAP, POP3, MAPI mail protocols.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Mail Monitor**.
5. Enter rule (DM) name to **Name** field.
6. Choose control level fpor sent and recieved mail:
   - **Deny sending and recieving mail**;

- **Allow only recieving mail**;
- **Allow sending and receiving mail**.

> **Warning!**
>
> Depending on the outgoing and incoming mail control method, the following variants of shadow copy creation are possible:
>
> - **Deny sending and receiving mail** -shadow copies are not being created;
> - **Allow only receiving mail** - for incoming mail (for shadow copy creation, tick the **Incoming** box);
> - **Allow sending and receiving mail** - for incoming and outgoing mail (for shadow copy creation, tick the **Incoming** and **Outcoming**).

7. Manage shadow copy creation. Tick the **Incoming** or **Outcoming** box in a **Create events with a shadow copy of mail** line.

> **Warning!**
>
> **Allow sending and receiving mail** option requires ticking either **Incoming** or **Outgoing** box, or else a Rule (DM) won't be saved.

8. You can, as well, manage additional parameters of shadow copies:
   - **Transferred via**. Variants possible:
     - **All channels** - to create a shadow copy of mail, transferred per any channel, but encrypted;
     - **Encrypted channel** - to create a shadow copy of mail, transferred per encrypted channels.
   - **Maximum mail size**. When ticked, all created shadow copies will be for mail smaller or equal to the number mentioned.

> **Warning!**
>
> In case there is not enough space available on a Workstation (see. "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), shadow copy will not be created.

9. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
10. When all parameters are configured, click **Save**.

**Warning!**

In case existing rule (DM) has attributes:

- **Allow sending and receiving mail**;
- **Create events with a shadow copy of mail: Incoming and Outcoming, transferred via: All channels**

and there is a saving mail on the mail server setting configured in the mailer, then each mail sending event will generate two interception objects: one of **Outcoming** type and other of **Incoming** type. The name of the mailer option might change depending on the program in use.

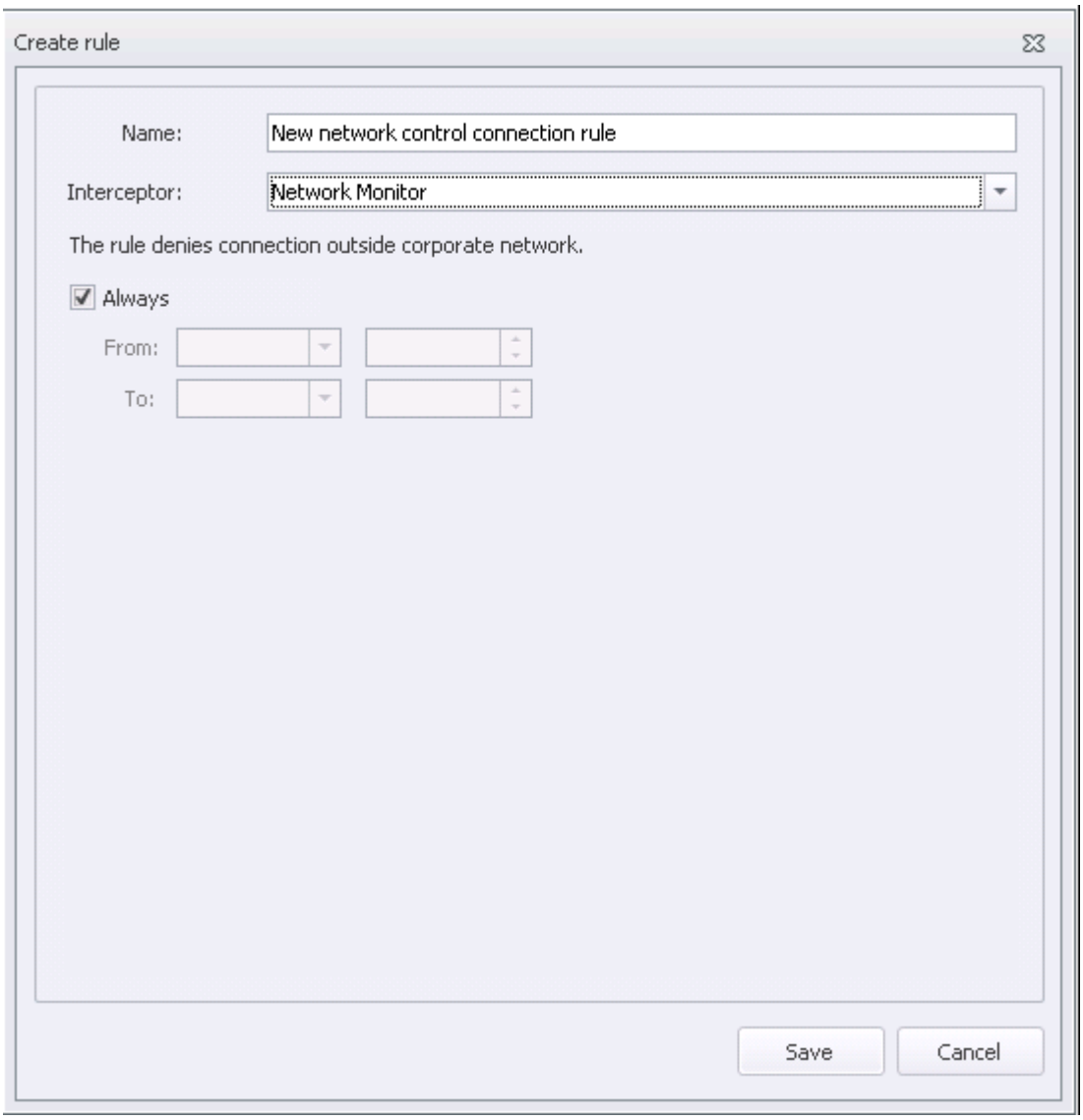
Manage shadow copy creation. Tick the Incoming or Outcoming box in a Create events with a shadow copy of mail line.

#### 6.4.3.2.2.10 CONFIGURING NETWORK MONITOR RULE (DM)

Network Monitor interceptor lets to deny transferring data by any network connections except connections with corporate network or specified permitted servers. Configuring segments of corporate network and permitted external addresses is performed as described in "Settings of Corporate Network".

**Warning!**

As at least one Network Monitor takes effect, Device Monitor Agent installed on the computer will try to approve DNS-names of opened internet pages. To prevent problems with external connections, it is required to configure forwarders usage on a corporate DNS-server (see internet article "Configure a DNS Server to Use Forwarders").



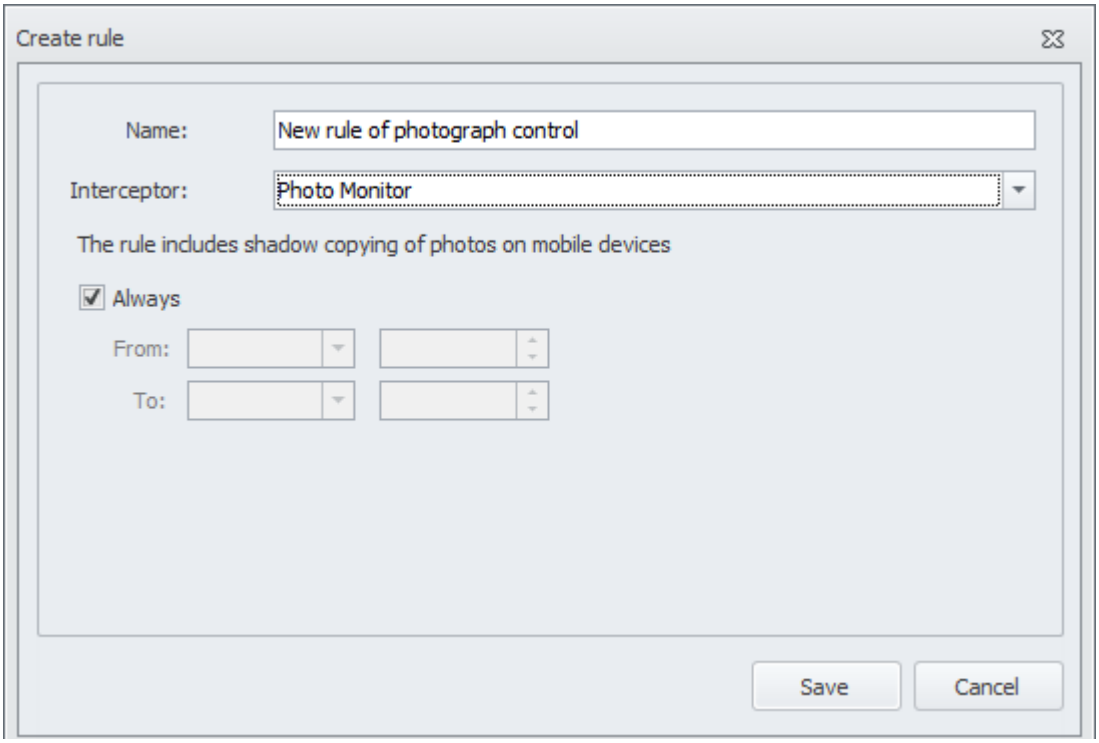

**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Network Monitor**.
5. Enter rule (DM) name to **Name** field.
6. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.

7. When all parameters are configured, click **Save**.

### 6.4.3.2.2.11 CONFIGURING PHOTO MONITOR RULE (DM)

Photo Monitor interceptor allows to perform shadow copying of photos, created with the cameras on controlled mobile devices.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Photo Monitor**.
5. Enter rule (DM) name to **Name** field.

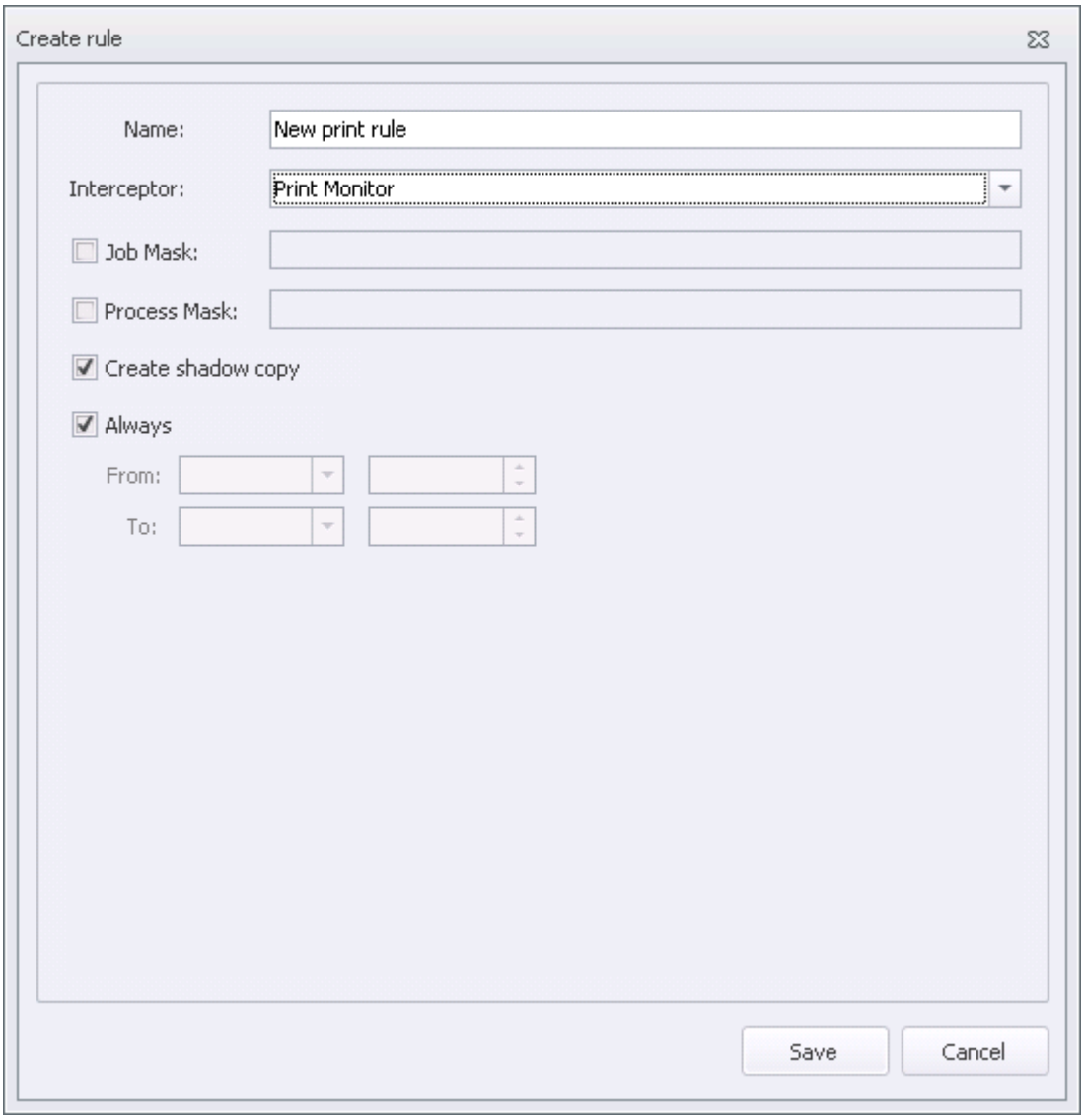
**Warning!**

In case there is not enough space available on a Workstation (see. "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), shadow copy will not be created.

6. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
7. When all parameters are configured, click **Save**.

### 6.4.3.2.2.12 CONFIGURING PRINT MONITOR RULE (DM)

**Print Monitor** interceptor allows you to perform monitoring of operations, which are connected with printing documents on local and network printers.




**To configure the rule, perform the following steps**:

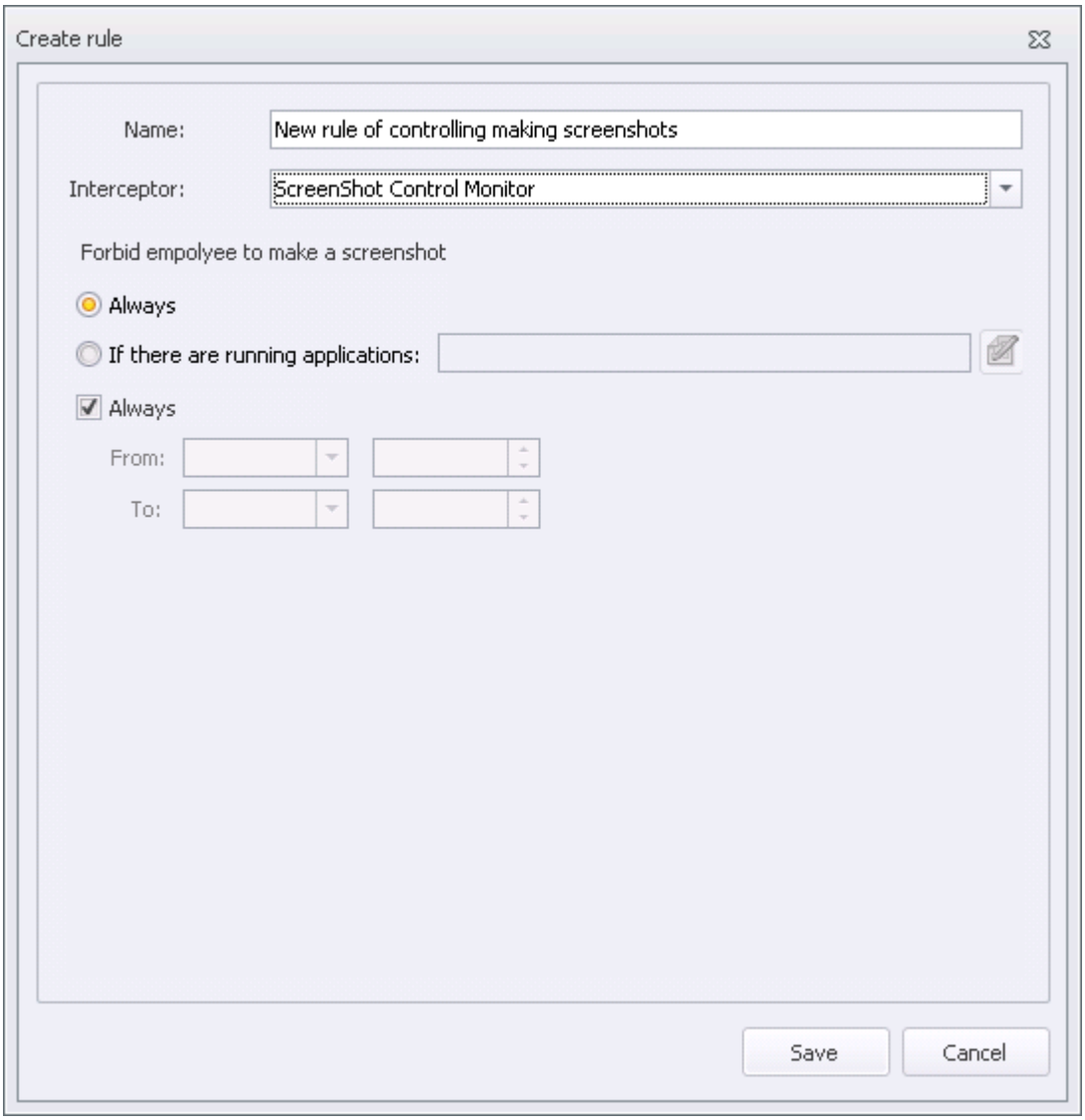
1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **Print Monitor**.
5. Enter rule (DM) name to **Name** field.
6. If necessary, you can limit controlled print tasks with the help of masks:
   - **Job Mask**. Using mask for task (document) which is sent for print. If required to specify job task, check the box and specify the task.
     Name of the printing task is formed by application, from which document is sent for print. Therefore, name can look like any text line, including not connected to the printed document type.
     In task mask one can use substitution symbols: «?» to replace one character or «*» to replace character set. "Space" is interpreted as part of the task name.
   - **Process Mask**. Using mask for process, which takes the print job. If required to create process mask, check the box and specify process mask.
     Name (full path) of the process will be aquired for the process, in which context rendering of a print job is performed. In some cases (local LPT- and COM-printers) printing subsystem can perform rendering in the context of the Print Spooler service. Path to the executable file of the service: `%SystemRoot%\system32\spoolsv.exe`.
     For the process name to be identified correctly, it is necessary to set **Print directly to the printer** (**Printer properties** > **Additionally**) parameter in printer properties. In this case, task processsing will take place in context of the appliaction, from which the document was sent to print.
     However, in this case, the print will occur synchronously, i.e interaction with applications will be impossible until the printing is over.
     In task mask one can use substitution symbols: «?» to replace one character or «*» to replace character set. "Space" is interpreted as part of the task name.
7. If you want to create and transfer shadow copies of printing documents to Traffic Monitor, mark **Create shadow copy** checkbox.

> **Warning!**
>
> If Print Monitor rule (DM) should create print job shadow copy but there is less free space at the hard drive than required by the policy (DM) (see "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), then the printing will be performed without shadow copy creating.

8. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
9. When all parameters are configured, click **Save**.

### 6.4.3.2.2.13 CONFIGURING SCREENSHOT CONTROL MONITOR RULE (DM)

**ScreenShot Control Monitor** interceptor allows to control screen shots on a client side.




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane select a security policy (DM) which you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in Interceptor field select **ScreenShot Control Monitor**.
5. Enter rule (DM) name to **Name** field.
6. In area Forbid employee to make a screenshot define a rule (DM) period::

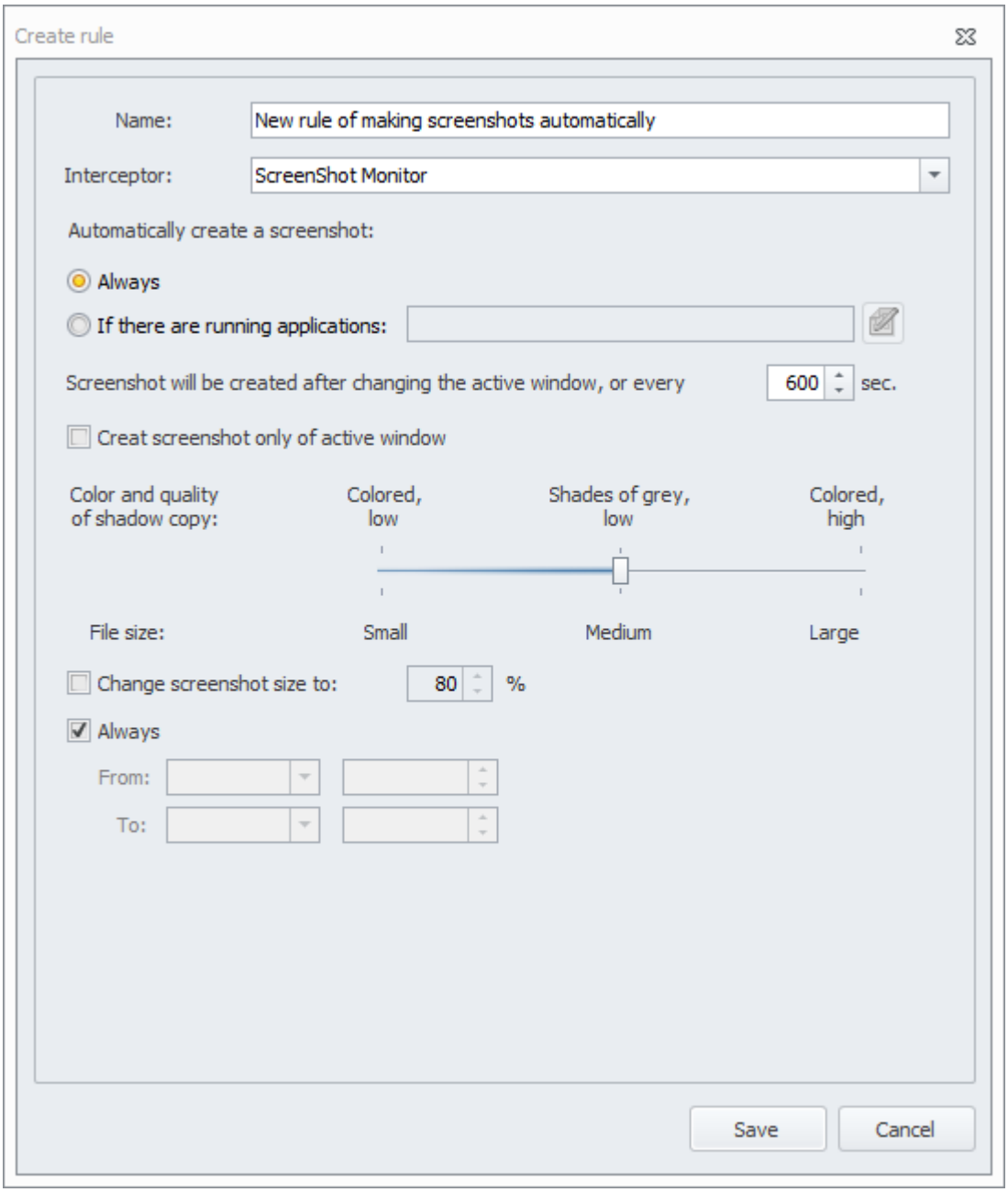
- **Always**. Has no time limit by default.
- **If there are running applications**. Pick a list of applications using  button (see "Applications protocol").

7. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
8. When all parameters are configured, click **Save**.

#### 6.4.3.2.2.14 CONFIGURING SCREENSHOT MONITOR RULE (DM)

The **ScreenShot Monitor** interceptor allows you to automatically create screenshots on controlled computers.

> **Warning!**
>
> The **Do not create screenshots in case mouse or keyboard have been inactive for a long time** parameter, which defines how the rule works depending on the activity on controlled computers, is configured along with general security settings (see "Control of Applications and Screenshots").




**To configure the rule, perform the following steps**:

1. Go to **Policies** section.
2. In **Policies** area at Navigation pane, select a security policy (DM) to which you want to add a rule (DM).
3. Do either of the following:
   - in the main menu, select **Edit > Create rule**;
   - click **Create rule** at the top of **Policies** area;
   - right-click at the empty space in **Policies** area and select **Create rule** from the drop-down list.
4. In **Create rule** dialog in the **Interceptor** field, select **ScreenShot Monitor**.
5. Enter rule (DM) name to **Name** field.

6. In the **Automatically create a screenshot** area, define in which case the rule (DM) will be valid:
    - **Always**. Has no time limit by default.
    - **If there are running applications**. Pick a list of applications using  button (see "Application protocol").
7. Specify periodicity of screenshots creation (in seconds). The default value is 600. A screenshot is also created when the active window changes.
8. If necessary, mark the **Create screenshot only of active window** checkbox. By default, a picture of the whole screen is taken.
9. Choose the color mode and the quality of created copies. Available color modes:
    - **Colored, low**. A colored file in a low resolution. Use this mode, in case you need files of small size.
    - **Shades of gray, low**. A file in greyscale mode in a low resolution.
    - **Colored, high**. A colored file in a high resolution. Use this mode, when you need high-quality images regardless of their size .
10. If you need to decrease the file size while saving, mark the **Change screenshot size to** checkbox and specify the value in percent (the percentage is calculated from the original file size).
11. Define a period of rule (DM) action. By default, the rule (DM) is always in effect (**Always** option is checked). To specify the rule (DM) duration, clear **Always** check box and specify dates and time in **From** and **To** fields.
12. When all parameters are configured, click **Save**.

### 6.4.3.2.3 Editing a Rule (DM)

**To edit a rule:**

1. Go to **Policies**.
2. In **Policy** area of Navigation pane select the title of security policy (DM) that contains the rule (DM). The main window will display the full list of the policy (DM) rules (DM).
3. Select the row with the name of the rule (DM) you want to edit.
4. Take one of the following steps:
    - in Main Menu click **Edit > Edit Rule**;
    - double-click the selected row;
    - click  **Edit Rule** at the top of **Policy** area;
    - use **Ctrl+Shift+E** shortcut.
5. Edit rule (DM) parameters:
    - Configuring Application Monitor Rule (DM);
    - Configuring Clipboard Monitor Rule (DM);
    - Configuring Cloud Storage Monitor Rule (DM);
    - Configuring Device Monitor Rule (DM);
    - Configuring File Monitor Rule (DM);

- Configuring FTP Monitor Rule (DM);
- Configuring HTTPS Monitor Rule (DM);
- Configuring IM Client Monitor Rule (DM);
- Configuring Mail Monitor Rule (DM);
- Configuring Network Monitor Rule (DM);
- Configuring Photo Monitor Rule (DM);
- Configuring Print Monitor Rule (DM);
- Configuring ScreenShot Control Monitor Rule (DM);
- Configuring ScreenShot Monitor Rule (DM).

6. When all changes are made click **Save** in rule (DM) configuration dialog.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

#### 6.4.3.2.4 Deleting a Rule (DM)

**To delete a rule:**

1. Go to **Policies**.
2. In **Policy** area of Navigation panel select the name of security policy (DM) that contains the rule (DM). The main window will display the full list of the policy (DM) rules (DM).
3. Select the row that contains the rule (DM) you want to remove.

> **Note:**
>
> To delete multiple rules (DM) from a single security policy (DM), select the rows with the names of all rules (DM) you want to remove.

4. Take one of the following steps:
   - in Main Menu click **Edit > Delete Rule**;
   - use  **Delete rule**, which is located in the upper part of **Policies** area;
   - click **Delete** button on a keyboard.
5. In request box select **Yes** to confirm that you want to remove the rule (DM).

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

#### 6.4.3.2.5 Copying a Rule (DM)

Rules (DM) can be copied from one security policy to another.
**To copy a rule:**

1. Go to **Policies**.
2. In **Policy** area of Navigation pane, select the name of the security policy (DM) that contains the rule (DM) you want to copy.
3. In main screen workspace select the row that contains the name of the rule you want to copy. You can select multiple rows to copy group rules (DM) into a single security policy (DM).
4. Click and hold the selected row and drag the rule (DM) into **Policies** area of Navigation pane. Move the pointer over the title of security policy (DM) you are adding the rule (DM) to. Release the button when a yellow arrow appears next to the selected policy (DM).

This copies the rule (DM) to selected security policy (DM).

You can also copy rules (DM) from the dialog of editing the policy (DM) to which you want to add rules (DM) from other policies (DM).

**To copy a rule while editing a policy:**

1. Go to **Policies**.
2. In **Policy** area of Navigation pane, select the name of the security policy (DM) that you want to add a rule (DM) to.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Edit Policy**;
   - click  **Edit Policy** at the top of Navigation pane;
   - press **Ctrl+E** on a keyboard;
   - double-click selected security policy (DM) name.
4. click **Select rules**. In new dialog flag the rules (DM) you want to copy to a new security policy (DM). You can select the whole policy (DM) - then all rules (DM) it contains will be added to editing security policy (DM).
5. After you mark all rules (DM) click **Select**.
6. Click **Save** to save policy (DM).

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.3 Employees

Employee and employee group management basics are available in "Employees and Employee Groups". Existing security policies (DM) can be assigned only to employee groups. Security policy (DM) for an employee is defined by including his/her account to the employee group.

**Warning!**

In addition to employee group security policy (DM), each employee is covered by workstation security policy (DM). Information about rule (DM) conflict resolving see in "Rules Application (DM)".

To go to Console (DM) section designed for accounts management, click **Employees** button on Navigation pane.

Guidelines on account management is available in:

- Viewing Employee Details;
- Viewing Resultant Policy and Resultant White List for an employee;
- Adding and Editing an Employee Group;
- Deleting Employee Group;
- Adding Employee Account to a Group;
- Editing Employee Account;
- Removing Employee Account from Employee Group;
- Deleting Employee Account from Security Schema.

### 6.4.3.3.1 Viewing Employee and Employee Groups Details

Employees area of Navigation pane displays employee group list. Selected employee group employees are listed in the main window work pane.

**Note:**

Use additional features to adjust employee list view (see "Additional Features").

**To view information for specific employee group**,
select group name in employee group list.
**To view all registered employees information**,
click **Show All Employees** at the top of Navigation pane.
Employee account information is represented as tabular list. Each row in the list contains a single account. Columns contain accounts' general properties. Extended information on each account is available in **Details** panel.

**To view account's detailed properties**,
select the row that contains the account name.
**Details** panel displays table properties including the following information:

- **Account**. Account name.
- **Last Name**, **First Name**, **Middle Name**. Account owner's last, first and middle name.
- **SID**. Operating System internal ID.

**Note:**

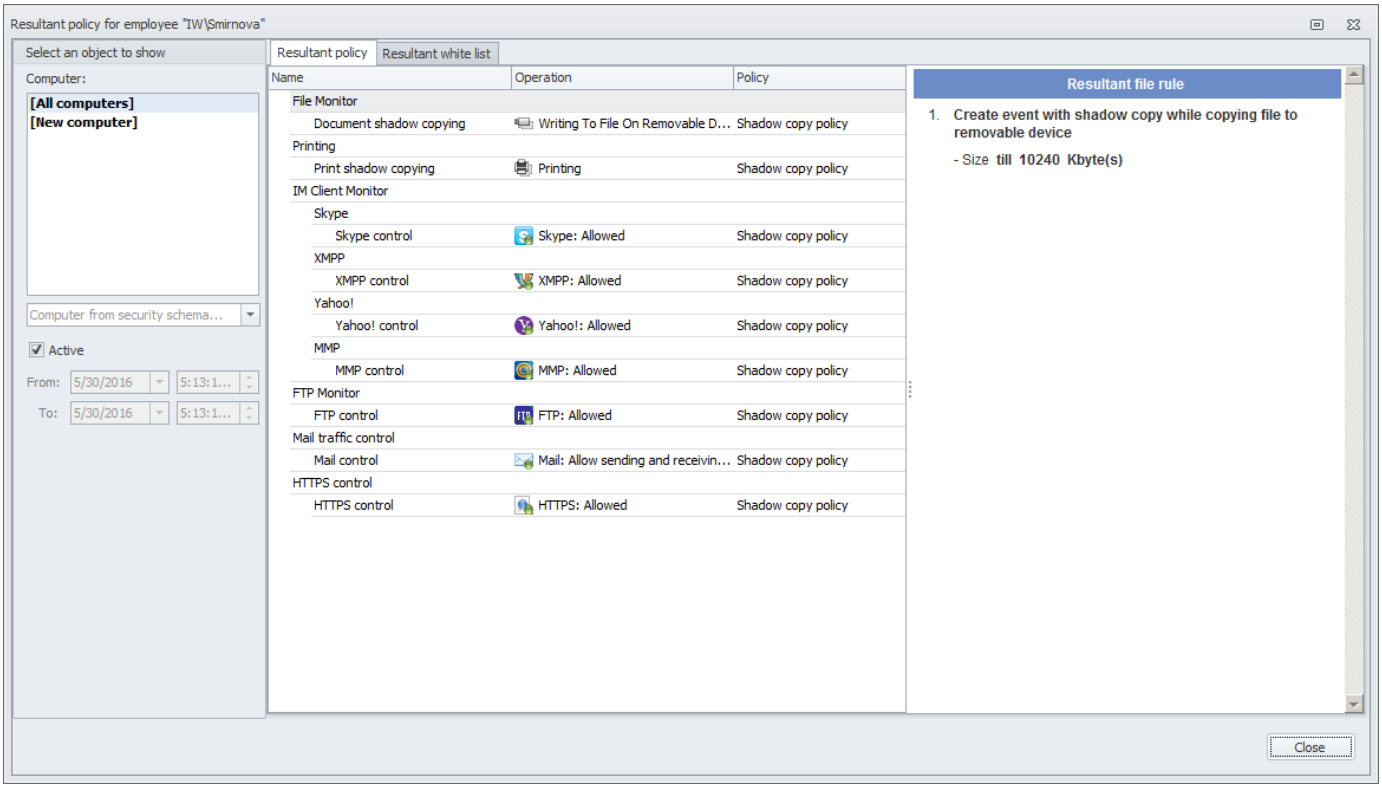
Some information on **Details** panel is duplicated in the main screen workspace.

### 6.4.3.3.2 Viewing Resultant Policy (DM) and Resultant White List for an employee

**To view information about policy for an employee**:

1. In the **Employee** list, pick an employee you want to view policy (DM) and white list for.
2. Proceed with one of the following actions:
   - in the Main Menu choose **Edit -> Show effective policy**.
   - on **Employees pane** click **Show effective policy**.

As a result, a window **Resulting policy for employee<employee name>** will be displayed**:** where by default all resulting policies (DM) for all employees on the chosen computer are displayed.




The main window **Resulting policy for employee<computer name>** area contains three tabs:

- **Resultant policy** - rules (DM) are displayed, that are resulting on a computer. Resulting policy (DM) folds from rules (DM), configured by default, rules (DM), applied for this computer and rules (DM) for computer's users (see "Device Monitor Rules (DM) Application"). To see detailed information about a rule (DM), select it from the list: detailed information will be displayed on the panel on the right.
- **Resultant white list** - displays devices, which are allowed for computer (see "White lists"). To see detailed information about device, select it from the list: detailed information will be displayed on the panel on the right.

**On a Workstation pane**:

- **All Workstations** - resulting policy (DM) for an employee account without attachment to a workstation.
  **Note**: to view resulting policy (DM) of an employee for a definite workstation, pick a workstation from Workstation pane or drop-down list Workstations from security schema.

- **New workstation** - resulting policy (DM) for an employee on a new workstation (it is not yet present in the security schema).
- To see resulting policy (DM) for chosen user on a definite computer:
  - from the **Computer** list, choose the name of the computer, on which chosen account is registered

  or
- from the **Computer from seciruty schema** drop-down list choose any account on computer, which is registered in the System (see "Computers").

You can choose time period for resulting policy/white list:

- Default setting is **Active** and current resulting policies (DM) and white list is displayed;
- To see resulting policy/white lists for chosen emloyee for defined period, untick the **Active** checkbox and specify time period.

#### 6.4.3.3.3 Adding and Editing an Employee Group

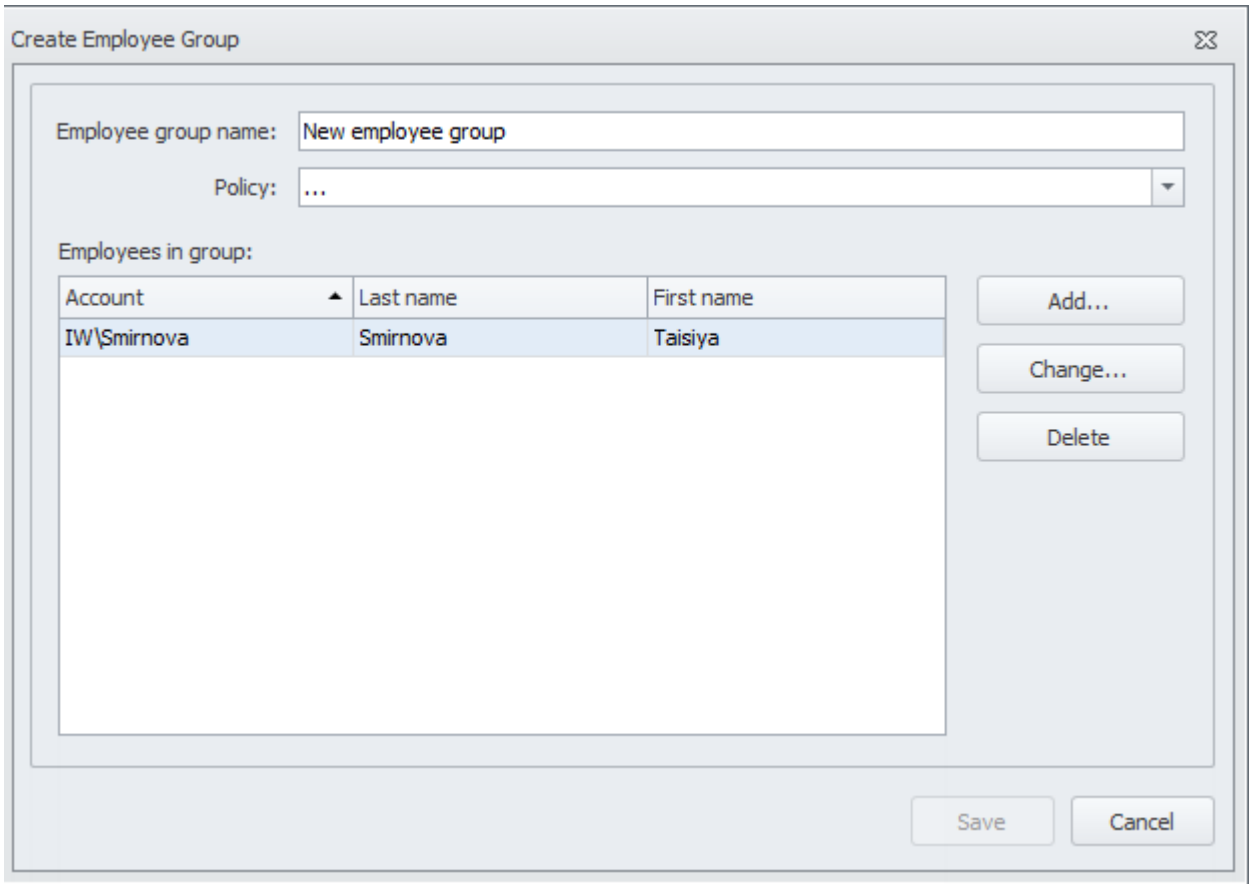
**To add or edit an employee group**:

1. Go to **Employees** section.
2. Take one of the following steps:

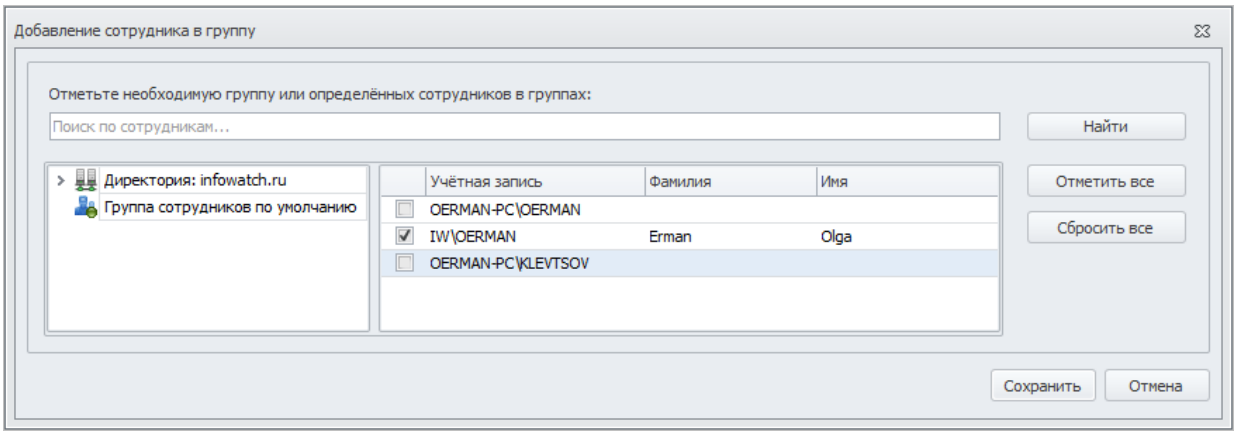
| Action | Steps |
|---|---|
| Add employee group | • select **Edit > Create Employee Group** in the Main Menu;<br>• click **Create Employee Group** at the top of the Navigation Pane. |

| Action | Steps |
|---|---|
| Edit employee group | 1. I**n Employees** area of Navigation Pane select the employee group name.<br>2. Take one of the following steps:<br>○ in the Main Menu, click **Edit > Edit Employee Group**;<br>○ click **Edit Employee Group** at the top of Navigation pane;<br>○ double-click selected employee group name. |

As a result of any of these actions, dialog window will appear to define parameters of employees group.




3. Specify the following parameters:
   - **Employee group name**. Name of employees group.
   - **Policy**. Choose security policy (DM) from the drop-down list, which will be applied to this employess group.
4. Determine the list of employees in the group:
   - To add one or several entries, click **Add**.




The Add employee to the group dialog displays a list of accounts imported from the directory service (see "Connecting to LDAP Server") and already registered in the System (for example, when Device Monitor Client was installed to the workstation) and belonging to existing Device Monitor employee groups. To add an employee, in left pane select a node in groups tree, then flag accounts you want to add to edited group. To flag all accounts of selected node, click Mark all. To clear selection, click Clear all.

You can also make a search of account by all available elements: enter a part of account name to the field at the top and click Find. After you selected all needed accounts, click Save to close Add employee to the group dialog and return to a dialog box with group parameters. To edit account parameters, select it from the list of employees belonging to the group and click Change (see "Editing Employee Account").

- To edit account parameters, select it from the list of employees belonging to the group and click **Change** (see "Editing Employee Account").
- To delete an entry from the group, select it and click **Delete**.

5. Click **Save**.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.3.4 Deleting Employee Group

**To delete employee group**:

1. Go to **Employees** section.
2. Click the employee group you want to delete.
3. Take one of the following steps:
   - select **Edit > Delete Employee Group** in the Main Menu;
   - click **Delete Employee Group** at the top of **Navigation Pane**.
4. Click **Yes** in confirmation box to confirm that you want to remove employee group.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.3.5 Adding Employee Account to a Group

After InfoWatch Device Monitor Client is installed to the workstation (see document "InfoWatch Traffic Monitor. Inastallation guide" article "InfoWatch Device Monitor Client Setup"), data on all employees registered at it is automatically added to the Device Monitor security schema, "Default" employee group. Therefore the policy (DM) assigned to "Default" employee group will be applied to all newly registered employees. In prospect security policy (DM) for an employee is defined by including its account to different employee groups.

**To move an employee account from one group to another:**

1. Go to **Employees** section.
2. In **Employees area** of Navigation pane select a group containing employee's entry.
3. In **Employees** area of main screen workspace select an account which you want to add to another group. Left-click and hold the selected row and drag it to **Employees** area of Navigation pane. Move the cursor over the name of the group you want to add an account to. When a yellow arrow appears at the left of selected group, release left mouse button.

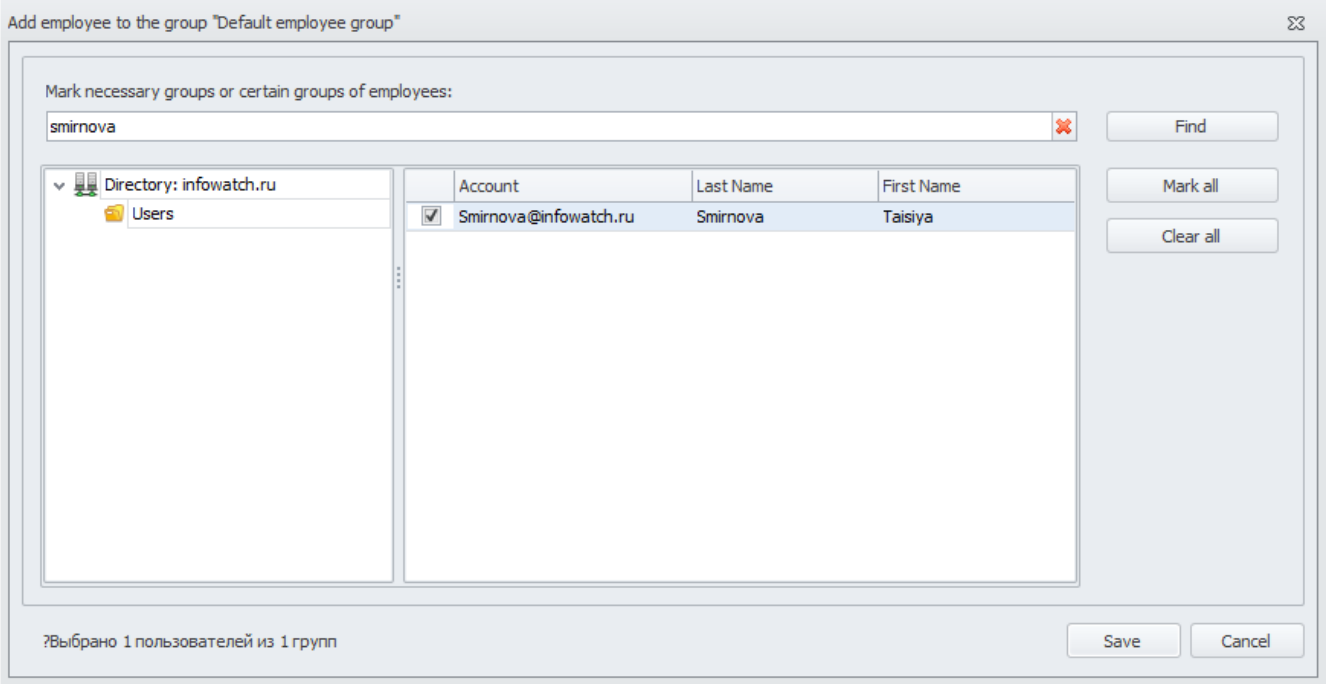
This adds an account to the selected group.

You can also manually import an information on the employee from directory service (see connection configuring description in "Connecting to LDAP Server"). Then after this employee is registered at the workstation where InfoWatch Device Monitor Client installed, this employee will be subject of policy (DM) of a group where the employee is added to.

**To add one or several accounts to employee group**:

1. Go to **Employees** section.
2. In **Employees** area of Navigation pane select a group which you want to add employee's account to.
3. Take one of the following steps:
   - in the Main Menu, click **Edit > Add Employee**;
   - click **Add Employee** at the top of **Employees** area;
   - right-click in Employees area and select **Add Employee** from the drop-down list;

The Add employee to the group dialog displays a list of accounts imported from the directory service (see "Connecting to LDAP Server") and already registered in the System (for example, when Device Monitor Client was installed to the workstation) and belonging to existing Device Monitor employee groups.




4. To add an employee, in left pane select a node in groups tree, then flag accounts you want to add to edited group.
   To flag all accounts of selected node, click **Mark all**. To clear selection, click **Clear all**.
   You can also make a search of account by all available elements: enter a part of account name to the field at the top and click **Find**.
5. After you selected all needed accounts, click **Save** to close **Add employee to the group** dialog and return to a dialog box with group parameters.
6. Click **Save**.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

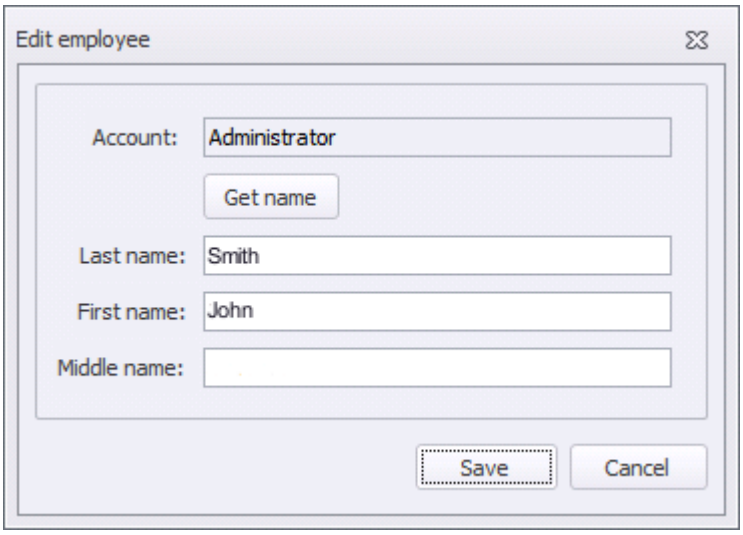
### 6.4.3.3.6 Editing Employee Account

Parameters of employee account are imported from directory service or while installing a InfoWatch Device Monitor Client to the computer where this employee is registered. If you want to add some information, you can enter employee's personal data as described below.

**To edit an employee account**:

1. Go to **Employees** section.
2. In **Employees** area of Navigation pane select the group the account belongs to.
3. Select the row that contains the name of the account you want to edit.
4. Take one of the following steps:
   - in the Main Menu, click **Edit > Edit Employee**;

- click **Edit Employee** at the top of **Employees** area;
- double-click the selected row.




5. In the **Edit employee** dialog window you can modify the following optional parameters: **Last Name**, **First Name** and **Middle Name**. You can either enter new values into appropriate fields manually or import them from directory service with **Get name** button.
6. Click **Save**.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.3.7 Removing Employee Account from Employee Group

**To remove an account from employee group**:

1. Go to **Employees** section.
2. In **Employees** area of Navigation pane select employee group the account belongs to.
3. Select the row that contains the name of the account you want to remove from this group.

**Note:**

To remove multiple accounts from a group, select the rows with employee's accounts you want to exclude from this group.

4. Take one of the following steps:
   - In the Main Menu, click **Edit > Remove** employee from group;
   - click **Remove employee** from group at the top of **Employees** area;

- press **Delete** keyboard button.

This removes employee account from selected employee group.

> **Note:**
>
> If employee account belongs to a single employee group, then after excluding it will be automatically added to default employee group.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

#### 6.4.3.3.8 Deleting Employee Account from Security Schema

**To remove employee account from security schema**:

1. Go to **Employees** section.
2. In **Employees** area of Navigation pane select employee group the account belongs to.
3. Select the row that contains the account you want to remove.

> **Note:**
>
> To remove multiple accounts from security schema, select all the rows that contain the accounts you want to remove.

4. Take one of the following steps:
   - In the Main Menu, click **Edit > Delete employee from security schema**;
   - click  **Delete employee from security schema** at the top of **Employees** area;
   - press **Shift+Delete** at the keyboard.
5. In the confirmation box click **Yes** to confirm that you want to remove the account.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

## 6.4.3.4 Computers

InfoWatch Device Monitor workstation is a managed workstation - computer where InfoWatch Device Monitor. Client is installed.
General principles of managing workstations are described in "Computers and Computer Groups" section. Actual security policies (DM) can be applied only to a workstation group. You can define a security policy (DM) for a certain workstation by including it to various workstation groups.

**Warning!**

Each workstation is a subject both of security policy (DM) of a workstation group and security policy (DM) of an employee which is currently authorized at that workstation. Information about rule (DM) conflict resolving see in "Rules Application".

To go to Management Console (DM) workstation section, click **Workstations** button on Navigation pane.

For more information on managed workstations see:

- Viewing Computer Details;
- Viewing Computer Effective Policy;
- Adding and Editing a Computer Group;
- Deleting Computer Group;
- Adding Computer to a Group;
- Removing Computer from a Group;
- Deleting Computer from Security Schema;
- Updating Clients at Managed Computers;
- Diagnostics.

On the procedure of Clients for mobile devices installation and installation, see "Mobile devices".

### 6.4.3.4.1 Viewing Computer Details

In **Computers** area of Navigation pane displays a list of computer groups. Main screen workspace displays the list of computers in selected computers group.

**Note:**

Use additional options to adjust computers list display (for details, see "Additional Features").

**To view the list of computers that belong to a separate group**, on the panel **Computers** choose the name of the required group:

list of computers, included in group, will be displayed in the working area.

**To view a full list of registered workstations**, click  **Show All Computers** at the top of Navigation pane.

Computer information is displayed in tabular list. Each row in the list contains a computer (row starts with ) or a mobile device (row starts with ) . Columns contain basic computer properties.

Tabular list contains the following basic information:

- **Name.** Domain name of computer.
- **Status**. Managed computer and Client status. This parameter may have the following values:
  - **Works properly**. Managed computer is enabled, Client is running.
  - **Inactive**. Managed computer is disabled or unavailable for a long time. The same status is displayed, if the Client is uninstalled from the managed computer.
- **Installed**. Date and time of computer Client's first access to the server.
- **Established**. Date and time of Client launch on computer.
- **Accessed**. Date and time of computer Client's last access to the Server.
- **Schema version**. Client's current security schema version number.
- **Client version**. Client version number.
- **Operation system**. Operation system version.
- **Comment.** Field to type in comment.
- **IP address**. IP address of computer.
- **User.** Last user account logged-in computer.

Extended information on each workstation is available in **Details** panel.

**To view properties of a separate computer**, choose row with the description of the required computer in working srea of the main window..

**Details** panel will display table of properties with the following workstation data:

- **Type.** Type of computer - displayed only for stationary or mobile computers.
- **Model name**. Model of mobile device - disaplayed for mobilr devices only.
- **Settings**. Common security policy (DM) settings version number (see "General System Settings").
- **Version of network control settings**. Data transmission through network connections with the help of Network Monitor control version (see "Settings of Corporate Network").
- **Configuration version of network applications control**. Version of network traffic control configuration, using protocols YMSG,XMPP, MMP, FTP, FTPS, SMTP/MAPI/POP3, HTTPS (see "Settings of Corporate Network").
- **Configuration version of excluded applications control**. Version number of application exclusion settings (see "Exclusion of Application from Interception"). In brackets the last application version number is specified.
- **Free disk space on computers**. Free space size on disks, where shadow copies are saved (i.e in percentages) and the minimum allowable size of this space.

**Warning!**

If there is at least one valid rule (DM) that allows shadow copying, and there is less free space on the host drive than specified by the policy (DM) (see "Creating Shadow Copies and Blocking Operations Due to Free Space Shortage"), no data will be printed or written to removable media:

even if these steps aren't covered by any rule (DM).

**Note:**

Information retrieved from some attributes is duplicated in the main screen workspace.

Each registered workstation is automatically added to "default" workstation group. At the same time, "default" workstation group security policy (DM) is assigned to the new workstation.
You can do the following as you work:

- manage computer groups:
  - add computer groups;
  - edit computer group parameters;
  - delete workstation groups.
- manage computers:
  - add computers' information to computer groups and thus define computer security policy;
  - remove computers from workstation group;
  - delete computer from security schema;
  - update Clients at managed computers.

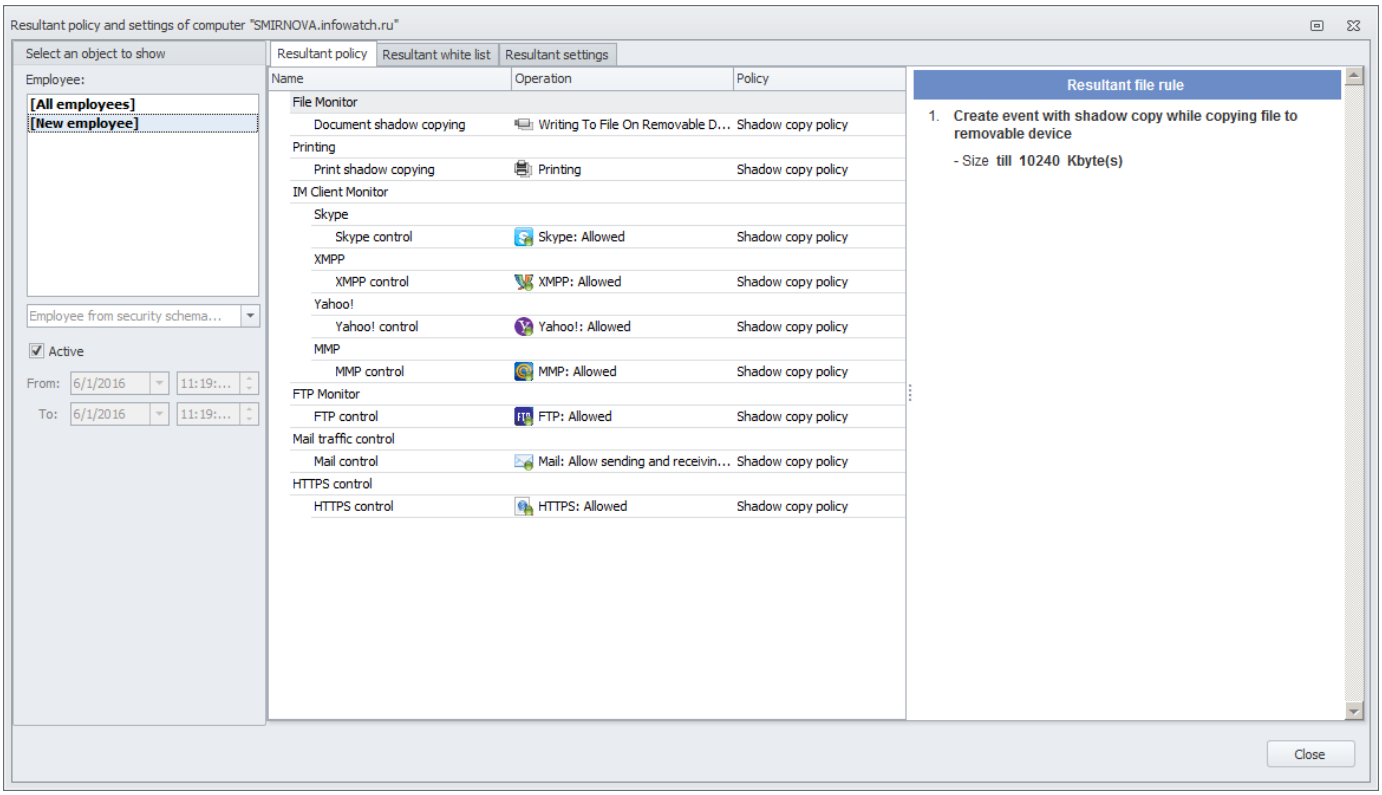
For more information on installing and deliting Clients for mobile devices see "Mobile devices".

#### 6.4.3.4.2 Viewing Resultant Policy (DM) and Resultant White List for Computer

**To view information about policy for computer**:

1. In the **Computers** list, choose the required one:
2. Proceed with one of the following actions:
   - in the Main Menu choose **Edit -> Show settings and resultunt policy**.
   - on **Computers** pane click **Show settings and resultunt policy**.

As a result, a window **Show settings and resultunt policy <computer name>** will be displayed**:** where by default all resulting policies (DM) for all employees on the chosen computer are displayed.




The main window **Resulting policy for employee<computer name>** area contains three tabs:

- **Resultant policy** - rules (DM) are displayed, that are resulting on a computer. Resulting policy (DM) folds from rules (DM), configured by default, rules (DM), applied for this computer and rules (DM) for computer's users (see "Device Monitor Rules (DM) Application"). To see detailed information about a rule (DM), select it from the list: detailed information will be displayed on the panel on the right.
- **Resultant white list** - displays devices, which are allowed for computer (see "White lists"). To see detailed information about device, select it from the list: detailed information will be displayed on the panel on the right.
- **Resultunt settings** - settings of Sending data to the client speed and Control disk space on client, which are resultant on computer, are displayed. Resultant settings consist of default settings and settings for computer group, which includes the selected computer. (see "Common Settings for Clients" and "Adding and Editing an Employee Group").

On a **Employee** pane you can choose object for review:

- **All Employees** - when chosen, resulting policy\white list\settings for all employees are displayed, regardless of who is logged on the selected computer.
- **New Employee** - when chosen, resulting policy\white list\settings for all employees are displayed for new employee (which is not yet registered in security scheme).
- To view resulting policy\white list\settings for a definite user:
    - Choose account name, registered on chosen computer from **Employee** list

  or

- From **Employee** drop-down list in security schema choose any account, which is registered in the System (see "Employees").

You can, as well, choose period for resultant policy/white list/settings to be displayed:

- tick **Active** box, to view current resultant policy/white list/settings for an employee;
- untick **Active** box, to view resultant policy/white list/settings for a definite period.

### 6.4.3.4.3 Adding and Editing a Computer Group

**Important!**

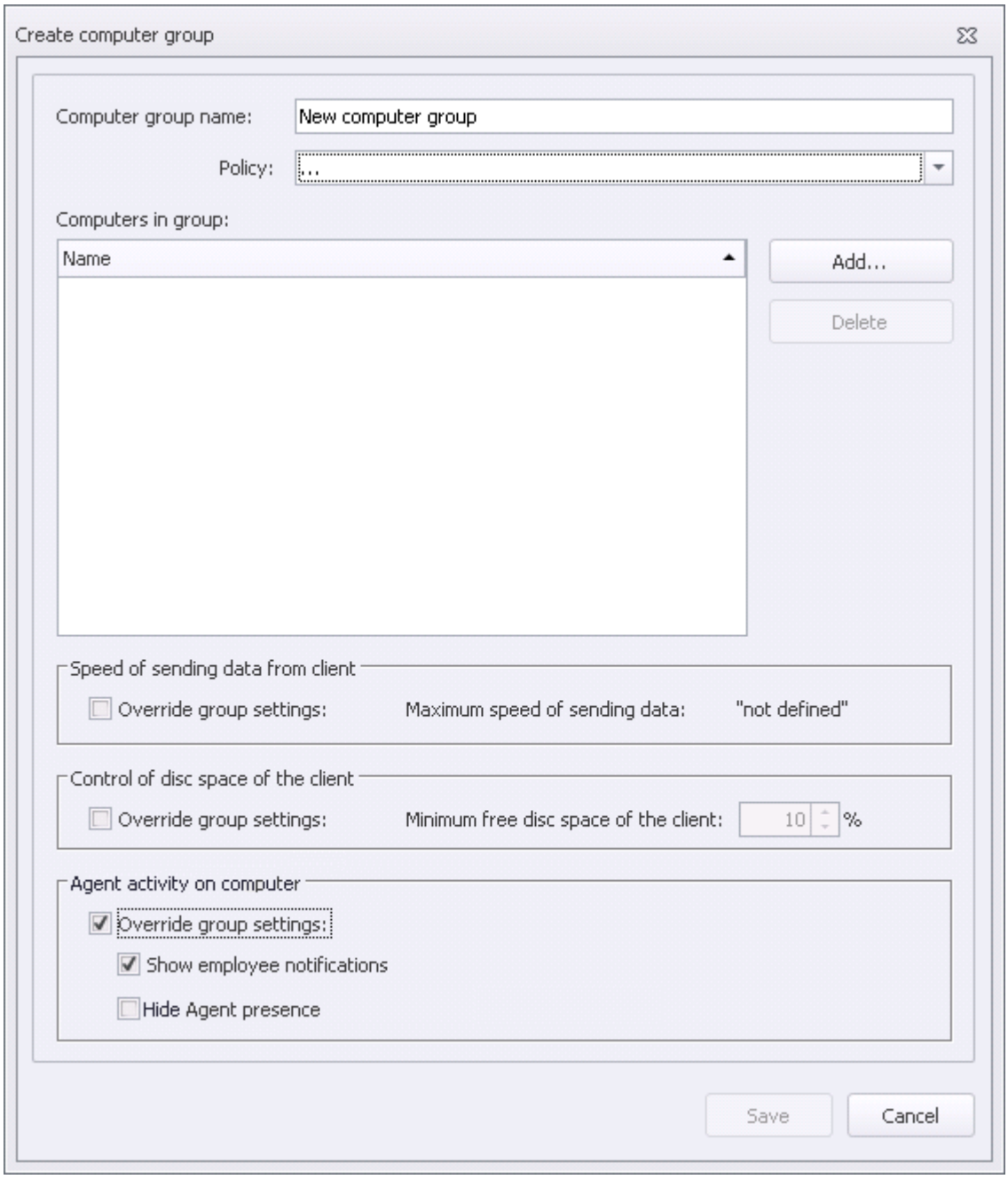
When you register a new computer, information on this computer is automatically added to the security scheme (to the "default" computer group).

**To create computer group:**

1. Go to **Computers** section.
2. Take one of the following steps:

| Action | Steps |
|---|---|
| Add computer group | • in the Main Menu, click **Edit > Create workstation group**;<br>• click **Create Computer Group** at the top of Navigation pane. |
| Edit computer group | 1. In **Computers** area of Navigation pane select workstation group name.<br>2. Take one of the following steps:<br>○ in the Main Menu select **Edit > Edit**;<br>○ click **Edit** at the top of Navigation pane;<br>○ double-click selected workstation group name. |

This opens a dialog box with group parameters.




3. In this dialog, specify the following parameters:
    - **Workstation group name**.
    - **Policy (DM)**. From the drop-down list select security policy (DM) that will be assigned to this computer group.
4. Define a list of computers in a group:
    - To add one or several computers click **Add**. In the opened **Add computer to the group** dialog you can
      select computers from:
        - directory service (for example, Active Directory);
        - Microsoft Windows Network;

- ones registered in System previously (for example, after manual Device Monitor Client installation) and already belonging to other Device Monitor groups.

Select a node from a tree in left panel then flag computers which you want to add to the group. You can also make a search of a computer in the directory. For this end enter a part or a computer name to the upper field and click **Find**.
When all needed computers are selected click **Save**: this closes the add window and returns you to configuring group settings.

- To delete a computer from the list select it and click **Delete**.

5. You can set particular speed of sending data from the Clients for computers belonging to the group (configuring of a common value is described in "Common Settings for Clients", **Limit the speed of sending data** setting). To do this:
   a. in the **Speed of sending data from client** area select **Override group settings**;
   b. in the **Maximum speed of sending data** field, specify the needed value, Kbps.

   The setting is not selected by default.
6. You can set particular volume of a minimum free disk space (when it is reached on the managed computer, shadow copies would not be created) for computers belonging to the group (the configuring of a common value is described in "Common Settings for Clients", **Minimum free disc space of the client** setting). To do this:
   a. in the **Control of disk space of the client** area select **Override group settings**;
   b. in the **Minimum free disc space** of the client field, specify the needed value, percent.

   The setting is not selected by default.
7. You can set a particular mode of Client hiding for computers belonging to the group (the configuring of a common value is described in "Common Settings for Clients", **Agent activity on computer** setting group).
   To do this:
   a. in the **Agent activity on computer** area select **Override group settings**;
   b. select or deselect **Show employee notifications** and **Hide Agent presence** settings.

   The setting is not selected by default.
8. Click **Save**.

**Warning!**

To apply changes you have to save current security scheme (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.4.4 Deleting Computer Group

**To edit or delete computer group**:

1. Go to **Computers**.
2. In Computers area of Navigation pane select computer group name.
3. Take one of the following steps:
   - in the Main Menu select **Edit > Delete**;
   - click **Delete** at the top of Navigation pane.
4. In the following confirmation dialog select **Yes** to confirm that you want to delete computer group.

> **Warning!**
>
> The group you are deleting may contain computers that don't belong to any other group. If you delete
> the only group these computers belong to, they will be automatically added to "default" group

5. Click **OK**.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
> your security schema, all changes will be discarded.

### 6.4.3.4.5 Adding Computer to a Group

When installing InfoWatch Device Monitor Client (see document "Traffic Monitor. Installation guide" article InfoWatch Device Monitor Client Setup"), computer is added to "default" computer group. All computers inside "default" group will be affected by security policy (DM) assigned to this group. Further on, you can assign security policies (DM) by assign a computer to various computer groups.

**To move a computer from one computer group to another**:

1. Go to **Computers**.
2. In **Computers** area of Navigation pane, select computer group that contains the computer.
3. Select a row that contains the computer you want to add to another group. Click and hold the selected row
   and drag the computer to **Computers** area of Navigation pane. Move the pointer over the name of computer group you want to add the computer to. When a yellow arrow appears to the left of the selected group name, release the mouse button.
   This adds computer to selected computer group.

You can also add information about computers without InfoWatch Device Monitor Client manually. Computer information is imported from directory service (connection configuring settings see in "Connecting to LDAP Server") or your network environment. Then after InfoWatch Device Monitor installation this computer (see "Creating Primary Distribution Task") will be affected by the policy (DM) of the group it was added to.
The mobile devices do not allow this option.

**Warning!**

It is not recommended to add computers with similar names. These computers will be registered in InfoWatch Device Monitor system as a single computer, affected by the same policies (DM), and register the same events, etc.

**To add computer to a group**:

1. Go to **Computers**.
2. In **Computers** area of Navigation pane select computer group name. Main screen will display a list of all computers inside the group.
3. Take one of the following steps::
   - in the main menu select **Edit > Add computer**;
   - click **Add computer** located at the top of **Computers** area;
   - right-click in the workspace and select **Add computer** from the drop-down menu.

   In the opened dialog you can select computers:
   - imported from directory service (for example Active Directory);
   - received from Microsoft Windows Network;
   - among previously registered in the System.
4. Flag computers or computer groups. Minimized groups are marked with an icon ; expanded - . Doubleclick a group, to expand or collapse it.

   **Warning!**

   By marking a group you select the computers that are included in that particular group. Subgroups and subgroup computers of selected group are not selected: you have to select them separately.

   You can also specify computer name in the line at the bottom of dialog box. When listing names, separate them with semicolons.
5. Click **OK**.

This closes **Select computer** dialog and adds the information on selected computers to computer group.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
> your security schema, all changes will be discarded.

### 6.4.3.4.6 Removing Computer from a Group

Computer is added to a group basing on needed security policies (DM). You might need to disable policy's (DM) action to the
computer. To perform this procedure, you must remove computer from computer group with this policy (DM).

> **Note:**
>
> If you remove a computer from a single group it belongs to, it will be automatically added to "default" group.

**To exclude computer from computer group**:

1. Go to **Computers**.
2. In **Computers** area of Navigation pane, select computer group that contains the computer. This displays a
   full list of computers that belong to selected group.
3. Select a row that contains the computer you want to remove from computer group.
4. Take one of the following steps:
   - in the main menu select **Edit > Remove Computer From Group**;
   - click  **Remove Computer From Group** located at the top of Computers area;
   - press **Delete** keyboard button.

This removes computer from the group.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
> your security schema, all changes will be discarded.

### 6.4.3.4.7 Deleting Computer from Security Schema

You can remove a computer from the list of registered computers (for example, computer discontinued operation).

Computer information will not be deleted, but it will be marked as **Inactive** due to Client deactivation.
If you don't want to save inactive computer information, you can delete its record.

**To remove computer from security schema**:

1. Go to **Computers**.
2. In **Computers** area of Navigation pane, select computer group that contains the computer.
3. In the Main screen workspace, select the row that contains the inactive computer you want to remove.
4. Take one of the following steps:
   - in the Main Menu, click **Edit** > **Delete Computer From Security Schema**;
   - click **Delete Computer From Security Schema** located at the top of **Computers** area;
   - right-click computer row and select **Delete Computer From Security Schema**;
   - press **Shift+Delete** at the keyboard.
5. In the following confirmation dialog select **Yes** to confirm that you want to remove the computer.

This removes computer information from all groups the computer was assigned to.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
your security schema, all changes will be discarded.

### 6.4.3.4.8 Updating Clients at Managed Computers

Device Monitor Clients at managed computers can be simply updated by the task (see task details in "Clients
Remote Installation, Updating and Uninstallation" and "Creating Updating Task").

**To update Device Monitor Clients at all managed computers of the group**:

1. Go to **Computers**.
2. In **Computers** area of Navigation pane, select computer group.
3. Click **Update All Computers** located at the top of Navigation pane.

**To update Device Monitor Clients at selected managed computers**:

1. Go to **Computers**.
2. In Computers area of Navigation pane, select computer group.
3. In the Main screen workspace, select the row(s) containing managed computer(s). To select several computers click at them while pressing **Shift** or **Ctrl** button.
4. Click **Update Computers** located at the top of **Computers** area.

This creates and runs the update task for selected computers.

### 6.4.3.4.9 Diagnostics of the Workstation

The System allows you to remotely collect diagnostic data from workstations.

**Warning!**

It is only possible to collect diagnostic data for workstations: for mobile devices, this feature is unavailable.

**To start collecting diagnostic data on the computer**:

1. Go to **Computers** section.
2. In **Computers** area of the Navigation pane, select the group which includes the required workstation.
3. In the computer list, right-click the desired workstation and select **Diagnostics > Enabling diagnostic mode**.

**To stop diagnostic data collection on the computer**:

1. Go to **Computers** section.
2. In **Computers** area of Navigation pane, select the group which includes the required workstation.
3. In the computer list, right-click the desired workstation and select **Diagnostics > Disabling diagnostic mode**.

**To get the archive that contains all provided diagnostic data**:

1. Go to **Computers** section.
2. In **Computers** area of Navigation pane, select the group which includes the required workstation.
3. In the computer list, right-click the desired workstation row and select **Diagnostics > Gathering diagnostic data**.
4. In the **Select path to save archive with diagnostic data** dialog, specify the folder and the archive name.
5. In the notification window that opens, click **OK**.

## 6.4.3.5 Mobile Devices

Besides workstations, InfoWatch Device Monitor allows you to control employees' mobile devices (smartphones
and tablet PCs).
InfoWatch Device Monitor Client can work with the following models of mobile devices, Android OS versions and
build numbers:

| Device model | Android version | Build number |
|---|---|---|
| ASUS Nexus 7 2013 LTE (K009) | 4.3.0 | JLS36C |
| | 4.4.2 | KOT49H |
| | 4.4.3 | KTU84L |
| | 4.4.4 | KTU84P |
| Samsung Galaxy S3 (I9300) | 4.3.0 | JSS15J.I9300XXUGNK1 |

| Device model | Android version | Build number |
|---|---|---|
| | | JSS15J.I9300XXUGND2 |
| Samsung Galaxy S4 (I9500) | 4.3.0 | JSS15J.I9500XXUEMK8 |
| Samsung Galaxy S4 (I9505) | 4.3.0 | JSS15J.I9505XXUEMK9 |
| | | JSS15J.I9505XXUEML4 |
| | 4.4.2 | KOT49H.I9505XXUGNG8 |
| | | KOT49H.I9505XXUFNC9 |
| Samsung Galaxy S5 (SM-G900F) | 4.4.2 | KOT49H.G900FXXU1ANE2 |
| | | KOT49H.G900FXXU1ANK7 |

InfoWatch Device Monitor Client also supports devices on iOS platform: you can install InfoWatch Device Monitor Client on iPhone or iPad versions 8.0 - 9.0.2.

**Warning!**

Installing InfoWatch Device Monitor on iPhone or iPad is possible only if the device is jailbroken.

The System can associate several mobile devices with one employee, but a single mobile device can be associated with one employee only.

**Warning!**

To manage a mobile device entry and to install or uninstall InfoWatch Device Monitor Client, the following
requirements should be met:

- USB Debugging mode must enabled on the mobile device and all required drivers should be installed (for devices on Android platform only);
- the Management Console (DM) should run on a physical workstation (using virtual machines or remote desktop connections is not recommended; Microsoft Windows XP is not supported);
- the mobile device directly must be connected via USBe to the computer where the Management Console (DM) is running.

See details in "Preparing a Mobile Device on Android Platform" and "Preparing a Mobile Device on iOS
Platform".

Guidelines on Clients installation and uninstallation for mobile devices are available in:

- Preparing a Mobile Device on Android Platform;

- Preparing a Mobile Device on iOS Platform;
- Adding a Mobile Device to Computer Group;
- Adding a Mobile Device through Appointment to Employee;
- Deleting the Mobile Device.

### 6.4.3.5.1 Preparing a Mobile Device on Android Platform

If you are using a mobile device on Android platform, then to install, update or delete InfoWatch Device Monitor
Client, you should:

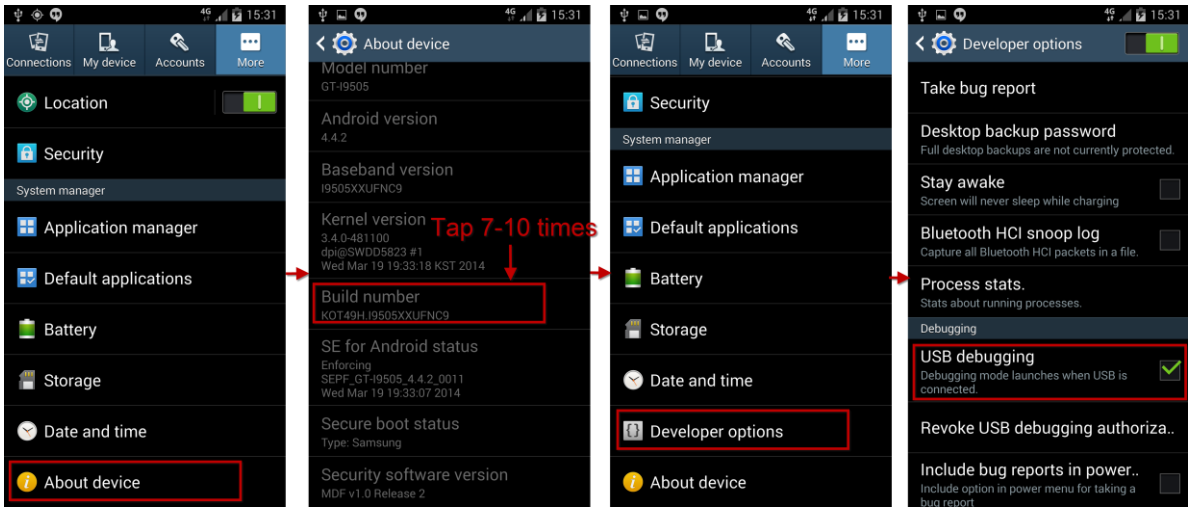
1. Enable "**USB debugging**" mode on the device: see example below.
2. Via a USB-wire connect this device to the computer where Device Monitor Management Console is running.
3. If necessary (for example, for some builds of Samsung), install additional drivers.

#### 6.4.3.5.1.1 STEP 1. ENABLING "USB DEBUGGING" MODE

The process of enabling the "USB debugging" mode can slightly vary for different models of mobile devices, different versions of OS and firmware.

**Enabling the debugging mode for Samsung Galaxy S4 with Android 4.4.2**:

1. Enable developer mode: **Settings -> About device -> Build number**; tap the build number several times (7
   - 10).
2. Then the notification will be displayed like "*You are now 3 steps away from being a developer*."




3. Continue tapping till successful mode enabling.
4. Return to **Settings** menu. Select **Developer options** appeared near About device.
5. Select **USB debugging**.

You can disable the debugging mode when the installation, updating or deleting the InfoWatch Device Monitor
Client is successfully completed.

**Huawei feature**:
The Huawei models can automatically disable USB debugging mode if the connection with the computer is lost.
Therefore the debugging mode should be enabled every time after connecting to the the computer.

#### 6.4.3.5.1.2 STEP 2. CONNECTING TO THE COMPUTER

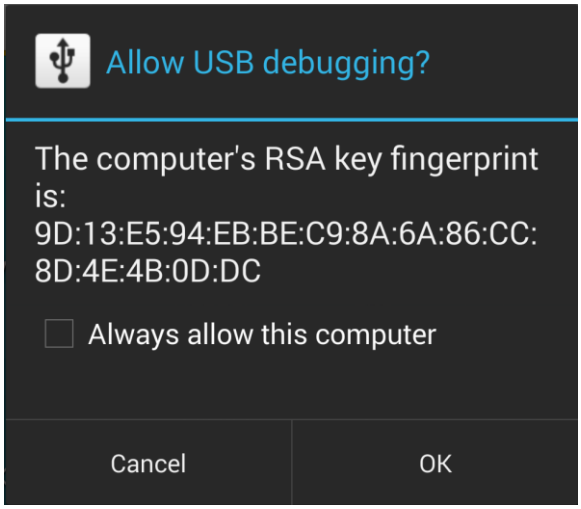
To install or update the InfoWatch Device Monitor Client, you should connect the mobile device to the physical
workstation where Device Monitor Management Console is running, via the USB-wire.

> **Warning!**
>
> If you are using a virtual machine or connection to a remote desktop, then the installation can fail due to
> increasing of the System response time. Therefore, we recommend that you should not use virtual machines or remote desktops.
> The System does not support installation of Device Monitor Client to mobile devices if the Management
> Console (DM) is running on a computer with Microsoft Windows XP. Therefore, we do not recommend using
> Microsoft Windows XP either.

You can see if the connection was successful and control the further installation of drivers in Device Manager (**Control Panel -> Hardware and Sound -> Device Manager**).

**Samsung feature**:
If the phone is "clear" - for example the build is just updated, - then you can need to perform additional actions:

1. On the phone slide down the notification panel.
2. Switch the device from the "**Multimedia**" connection mode to the "**Camera**" mode.
3. Allow the USB debugging on the appeared query.



#### 6.4.3.5.1.3 STEP 3. DRIVERS INSTALLATION

In a first connecting of the mobile device to the computer where the Device Monitor server is working the automatic
installation of the following drivers is performed:

- a driver for operation in a normal mode
- the **libusb** driver for operation in the downloaded mode

During installation of the drivers, the icon on the Device Monitor server's computer taskbar displays the process of
drivers searching and installation.

> **Warning!**
>
> Do not disconnect the mobile device during drivers installation! Wait for installation completion.

When installation of a driver is completed successfully, the computer will display a notification that this driver is
ready to use. In case of some errors in drivers installation, you can find solutions in InfoWatch Knowledge base: "Mobile Device
Driver Cannot Run Automatic Installation" or "Installing the Driver for Downloaded Mode" (libusb0)" for example.

### 6.4.3.5.2 Preparing a Mobile Device on iOS Platform

If you are using a mobile device on iOS platform, then to install, update or delete InfoWatch Device Monitor Client,
you should:

1. Jailbreak your mobile device (iPhone or iPad).
2. On the computer where Device Monitor Management Console is installed, install iTunes.
3. Connect the mobile device to the computer, where Device Monitor Management Console is installed, via a
   USB-wire.
4. Authorize the mobile device on the computer.

#### 6.4.3.5.2.1 STEP 1. JAILBREAKING THE MOBILE DEVICE

Installing InfoWatch Device Monitor Client on iPhone or iPad is possible only if the device is jailbroken.

**Note:**

The supported versions of iPhone and iPad are 8.0 - 9.0.2.

#### 6.4.3.5.2.2 STEP 2. INSTALLING ITUNES

To install InfoWatch Device Monitor Client on a mobile device, it is necessary that Apple Mobile Device Support
application should be installed on the computer (it is installed together with iTunes).

#### 6.4.3.5.2.3 STEP 3. CONNECTING TO THE COMPUTER

To install or update InfoWatch Device Monitor Client, you should connect the mobile device to the physical
workstation where Device Monitor Management Console is running, via the USB-wire.

**Warning!**

If you are using a virtual machine or connection to a remote desktop, then the installation can fail due to
increasing of the System response time. Therefore, we recommend that you should not use virtual machines or remote desktops.
The System does not support installation of Device Monitor Client to mobile devices if the Management
Console (DM) is running on a computer with Microsoft Windows XP. Therefore, we do not recommend using
Microsoft Windows XP either.

You can see, if the connection was successful, and control the further installation of drivers in Device Manager (**Control Panel -> Hardware and Sound -> Device Manager**).

#### 6.4.3.5.2.4 STEP 4. AUTHORIZING THE DEVICE ON THE COMPUTER

Once you have connected the device to your computer, you should authorize the device on this computer. For this:

1. Run iTunes on the computer.
2. In the message that appears on the device, confirm that this computer can be trusted.
3. On the computer, in the iTunes menu bar, select **Store -> Authorize this computer**.

### 6.4.3.5.3 Adding a Mobile Device to Computer Group

Mobile devices can be added to the security schema from the computer group with specifying the employee earlier created in the System or added from LDAP.

**Warning!**

To manage the mobile device account and to install or delete InfoWatch Device Monitor Client, the following settings are required:

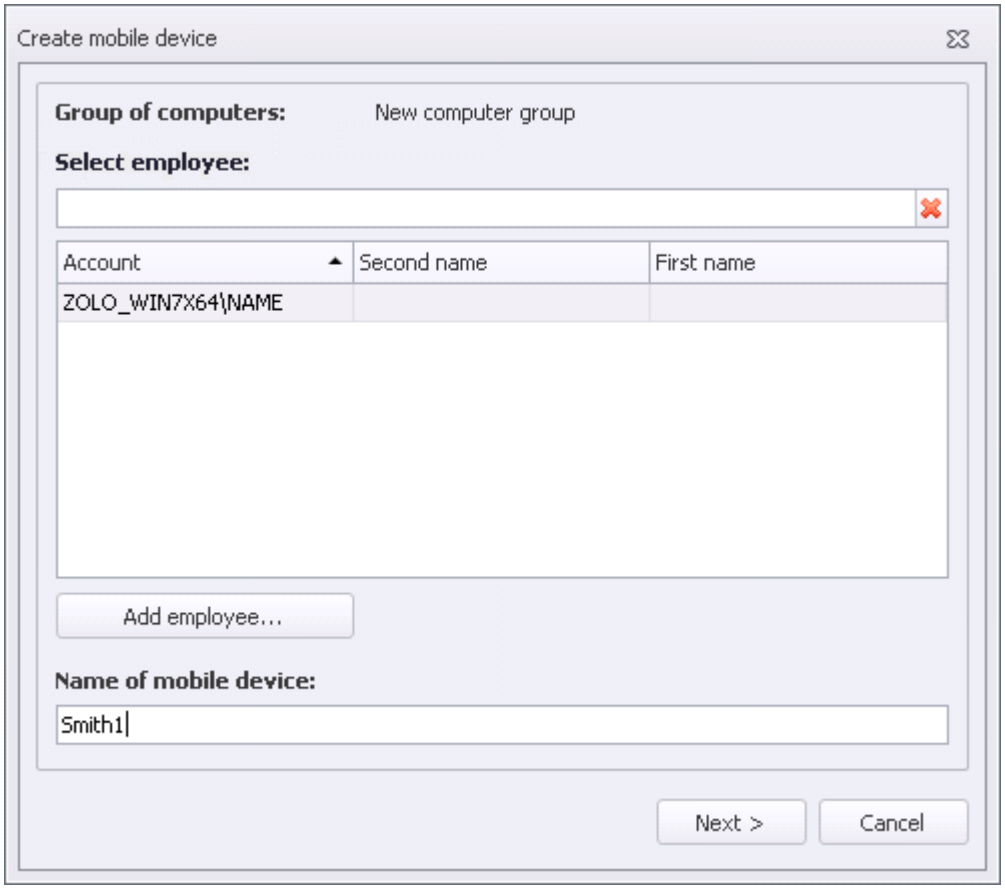
- USB Debugging or similar mode should be enabled on the mobile device and all required drivers should be installed (for devices on Android platform only);
- the Management Console (DM) should be running on a physical workstation (using virtual machines or remote desktop connections is not recommended; using Microsoft Windows XP is not supported);
- the mobile device should be directly connected via USB wire to the computer where the Management Console (DM) is running.

Details see in "Preparing a Mobile Device" and "Preparing a Mobile Device on iOS Platform".

**To add a mobile device to the computers group and install the InfoWatch Device Monitor Client to it**:

1. Go to the **Computers** section.
2. In the **Computers** area of Navigation pane, select the name of the group to which you want to add a mobile device.
3. Do either of the following:
   - in the main menu, select **Edit > Create mobile device**;
   - click  **Create mobile device** button located in the upper part of the **Computers** area;
   - right-click the workspace and select  **Create mobile device** from the shortcut menu.

   This opens a dialog box for creating a mobile device.




4. In the list of employees, select the required account.
   You can also start typing the account name in the entry field: the list will be filtered.
   If there is no needed account in the list, you can add it: click **Add employee**. On adding accounts, see "Adding Employee Account to a Group".
5. If necessary, change the entry name for the mobile device that was automatically created by the System.
6. Click **Next**.
7. In the installation wizard dialog box that opens, select the connected mobile device.
8. Click **Install**.
9. When the installation is complete, click **Finish**.

This will install InfoWatch Device Monitor Client to the mobile device and add the entry of the new mobile device to the selected computer group of the security scheme. The new mobile device will be associated with the selected employee.

**Warning!**

Once the Client is installed on the mobile device, a policy (DM) that is assigned to a default computer group will be deployed to this device. The policy (DM) assigned to the specified policy will be deployed on the mobile device after you save the security scheme.
On how to save the security scheme, see "Editing Security Scheme".

### 6.4.3.5.4 Adding a Mobile Device through Appointment to Employee

Mobile devices can be added to the security schema from the entry of the employee which you want to assign this
mobile device.

**Warning!**

To install InfoWatch Device Monitor Client, there should be:

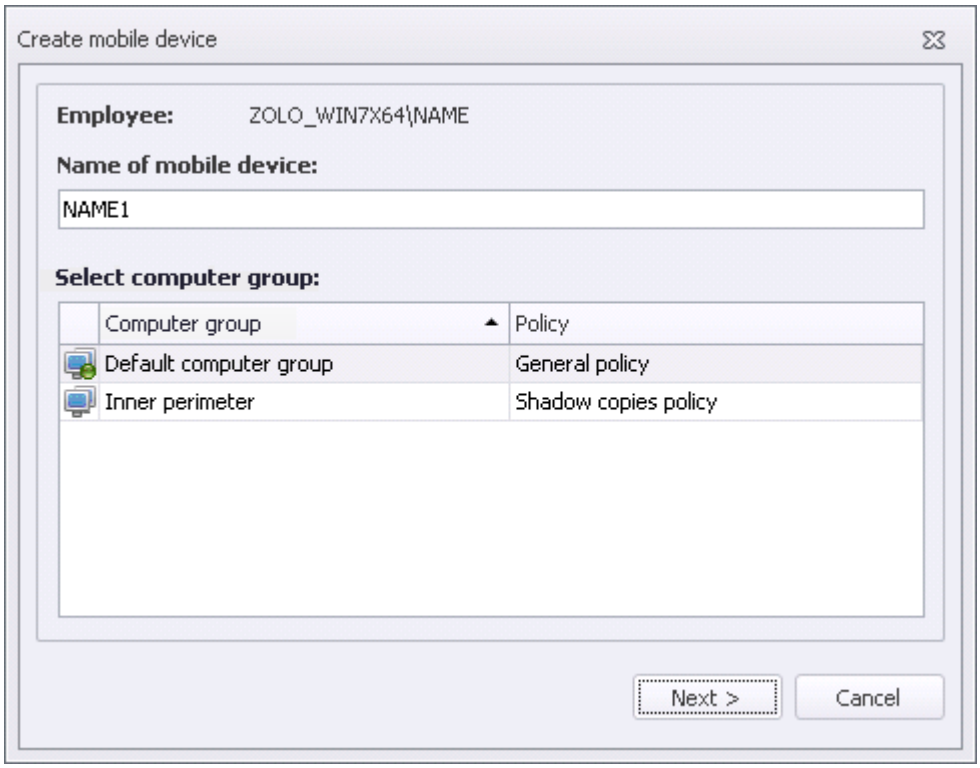
- USB Debugging mode enabled on the mobile device and all required drivers installed (for devices on Android platform only);
- the Management Console (DM) running on the physical workstation (using virtual machines or remote desktop connections is not recommended; using of the Microsoft Windows XP is not supported);
- mobile device directly connected via USB wire to the computer where the Management Console (DM) is running.

Details see in "Preparing a Mobile Device" and "Preparing a Mobile Device on iOS Platform".

**To add a mobile device to the security schema through the employees group and install the InfoWatch
Device Monitor Client to this device**:

1. Go to the **Employees** section.
2. In the **Employees groups** area on the Navigation pane select the group which contains the needed employee.
3. Select the employee list which you want to assign a mobile device to.
4. Take one of the following steps:
   - in the main menu select **Edit > Create mobile device**;
   - click  **Create mobile device** button located in the upper part of the **Employees** area;
   - right-click on the workspace and select  **Create mobile device** from the context menu.

This will display the dialog of creating the mobile device.




5. If needed, change the name of the mobile device entry.
6. Select the needed computer group from the list.
7. Click **Next**.
8. In the opened installation dialog window select the connected mobile device.
9. Click **Install**.
10. When the installation is completed, click **Finish**.

This will install the InfoWatch Device Monitor Client to the mobile device and add the entry of the new mobile device
to the selected computer group of the security schema. The new mobile device will bó associated with the selected
employee.

**Warning!**

Just after the Client installed to the mobile device, this device will have a policy (DM) appointed to the default
computer group, and only when the security schema will be saved, the device will have a policy (DM) appointed to
the computer group specified on mobile device adding.
Information on saving the security schema see in "Editing Security Scheme".

#### 6.4.3.5.5 Deleting the Mobile Device

The removing the mobile device from the security schema without uninstalling the InfoWatch Device Monitor Client
is performed in the way common for all the computers: see "Deleting Computer from Security Schema". For this
action no device connection is needed.

**Warning!**

To uninstall InfoWatch Device Monitor Client, there should be:

- USB Debugging mode enabled on the mobile device and all required drivers installed (for devices on Android platform only);
- the Management Console (DM) running on the physical workstation (using virtual machines or remote desktop connections is not recommended; using of the Microsoft Windows XP is not supported);
- mobile device directly connected via USB wire to the computer where the Management Console (DM) is running.

Details see in "Preparing a Mobile Device" and "Preparing a Mobile Device on iOS Platform".

**To delete the mobile device from the security schema and uninstall the InfoWatch Device Monitor Client
from this mobile device**:

1. In the main menu select **Tools > Delete mobile device**.
2. In the opened installation dialog window select the connected mobile device.
3. Click **Uninstall**.
4. When the uninstallation is completed, click **Finish**.

This will uninstall the InfoWatch Device Monitor Client from the mobile device and delete the entry of the new
mobile device from the computer group and security schema.

## 6.4.3.6 White Lists

You can manage lists of devices with full access from **White Lists** section. To go to this section, click **White Lists** button at Navigation pane.
For more information on white lists see:

- Viewing White List Details;
- Adding White List;
- Defining Entry Validity Period;
- Editing White List;
- Deleting White List.

You can view an information on acting white lists as described in "Viewing Resultant Policy (DM) and Resultant White List for an employee" and "Viewing Resultant Policy (DM) and Resultant White List for Computer".

#### 6.4.3.6.1 Viewing White List Details

**White Lists** area of Navigation pane displays all white lists. Main screen work pane displays devices (models and
instances) in selected white list.

> **Note:**
>
> You can make search in white list index: type the name of the list in the search box below the index on
> Navigation pane.
> You can adjust the displaying of selected white list using additional features (see "Additional Features").

**To view information for separate white list**,
select white list title in the group.
White lists information is available as a list of devices grouped by their type. Each row in the list contains device
model or instance. Columns contain devices' general properties. Extended information on device properties is
displayed in **Details** panel.

**To view detailed information on device properties**,
select the row that contains device model or instance name.

**Details** panel displays properties table including the following information:

- **Device instance or model identifier**. Model code (VID - Vendor ID) or device instance serial number (PID-Product ID).
- **Device description**.
- **Device type**.
- **Category**. Model or instance.
- **Period**. Full access period starting and expiry date and time.
- **Detected on computer**. Name of computer where the device was detected.
- **Added to database at**. Date of device information submission to database (see "Adding Device to Database").

> **Note:**
>
> Some of the properties on **Details** panel are duplicated in the main screen workspace.

### 6.4.3.6.2 Adding White List

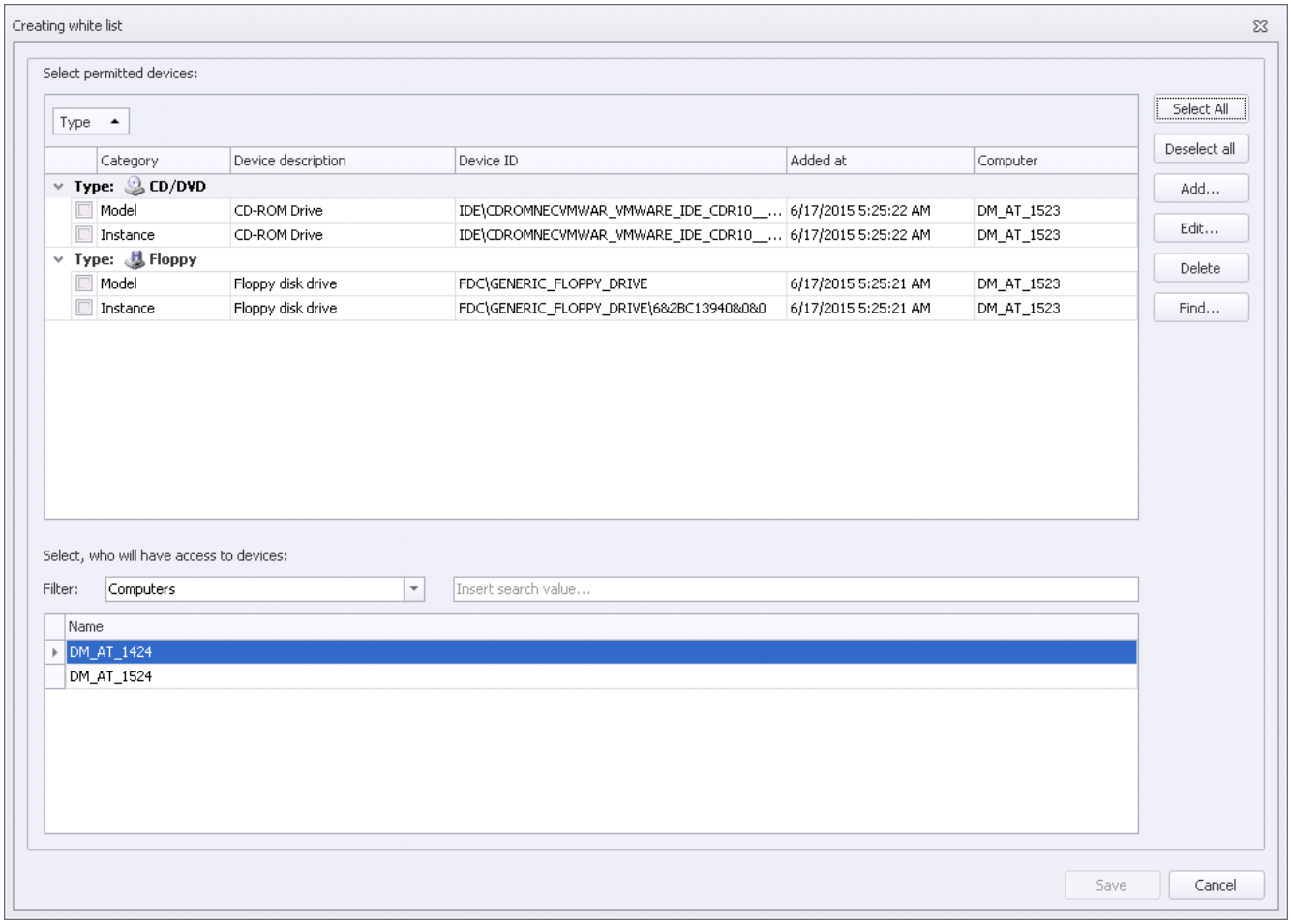
White list affects selected objects: employees, employee groups, computers or computer groups.

> **Warning!**
>
> A single object (employee, employee group, computer or computer group) can have only one white list
> assigned to.

**To add white list**:

1. Go to **White Lists** section.
2. Take one of the following steps:
   - select **Edit > Create White List** in the Main Menu;
   - click **Create White List** at the top of Navigation pane..

This opens **Creating White List** dialog displaying table containing all devices registered in the System.



3. In the table of devices select models and instances which should have full access to.

> **Warning!**
>
> Information on creating a list of registered device models and instances see in:
> Adding Device Entry;
> Deleting Device Entry.

4. In **Select, who will have access to devices** area select a filter: who will be affected to white list action:
    - employees
    - employee groups
    - computers
    - computer groups

   The list of entries will appear below.
   You can also use a search string by entering a name or its part.
5. Select employee / employee group / computer / computer group that will have full access to selected devices.
6. Click **Save**.

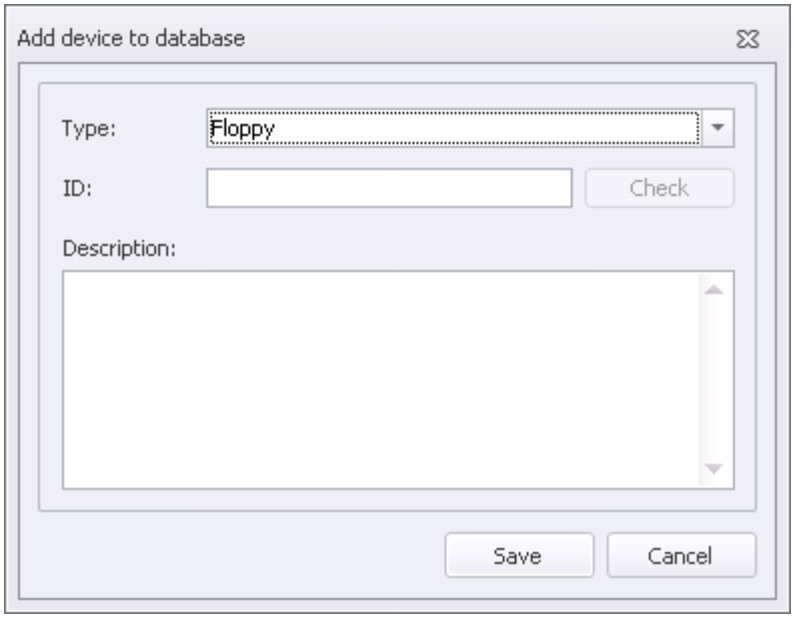
#### 6.4.3.6.2.1 ADDING DEVICE ENTRY

You can add to white lists only device models and instances which were previously registered in the System.
Device information is added in two ways:

- manually (if device ID is provided)
- via search engine (if device is connected to managed computer).

**To add device information manually**:

1. Open **Creating White List** dialog box (see "Adding White List").
2. Click **Add** button at the right of the window.
   This opens **Add device into database** dialog box.




3. Specify device parameters:
   - select device type from **Type** drop-down list;
   - enter the device instance or model identifier into **ID** box;

> **Note:**
>
> To retrieve device instance string, connect the device and use standard Windows tools (for example,
> **Device Manager**) to view its properties. Device instance string is displayed on Information tab.
> Device instance string is displayed as XXX\YYY\ZZZ where XXX is device type (usually, connection
> type, such as USB, IDE or ACPI), YYY is device model string (Vendor ID), and ZZZ is device
> instance string (Product ID).
> Model ID is displayed as XXX\YYY where XXX is device type and YYY is model ID string (VID).

To make sure the ID is valid, click **Check**.

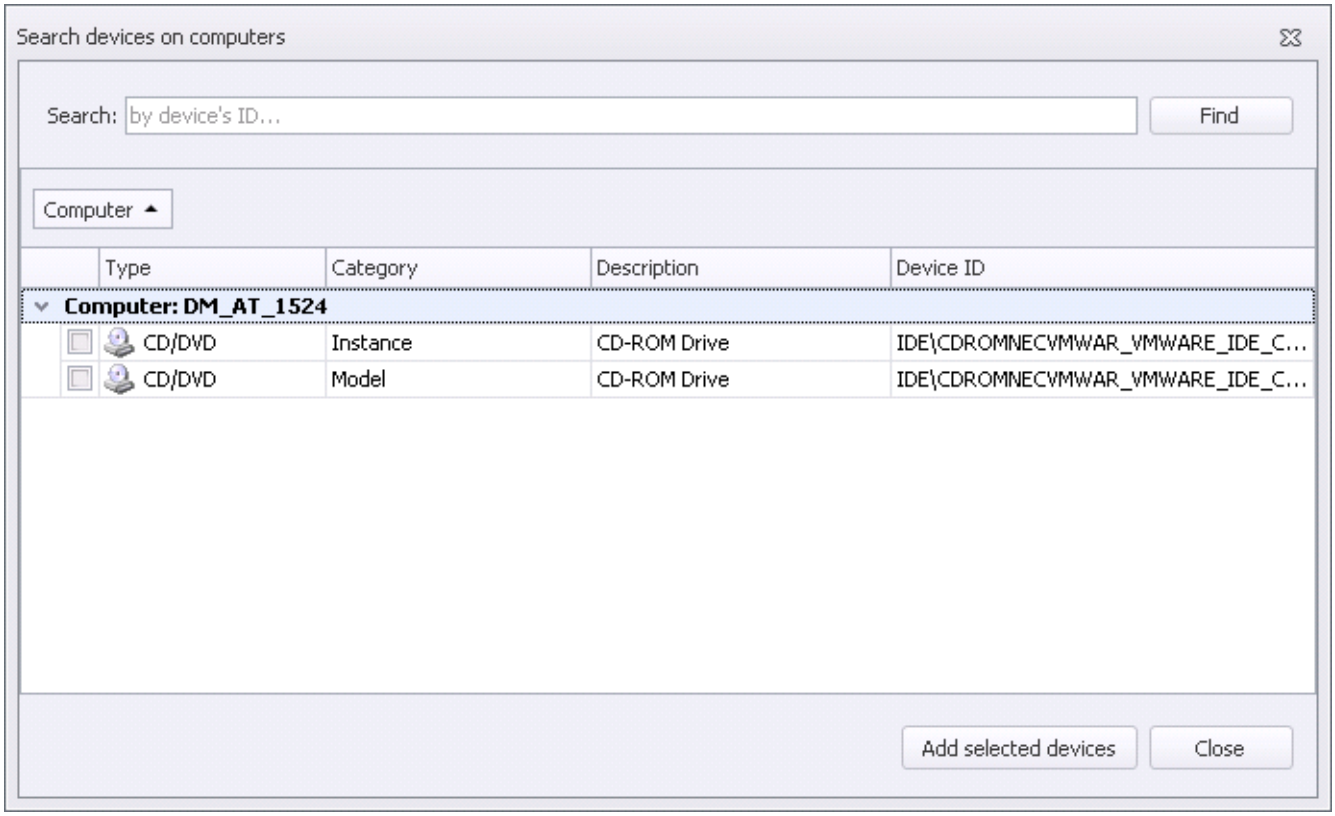
> **Warning!**
>
> When using instance code, take into account that some devices do not have unique ID: ID can be
> changed dynamically and differed even when connecting to different ports of the same computer.
> In such case using device model code is recommended.

   - enter description into **Description** box.

4. Click **Add**.

**To add device information via searching devices connected to managed computers**:

1. Open Creating White List dialog (see "Adding White List").
2. Click **Find** at the right.
   This opens **Search devices on computers** dialog box.




3. Use one of the following ways to select a managed computer from the list:
   - click ▶ next to computer;
   - double-click computer name.

   You will see a list of devices which were connected to selected computer during all the time Device Monitor
   Client was installed at the computer.
4. Flag the devices you want to add.
5. Click **Add selected devices**.

### 6.4.3.6.2.2 DELETING DEVICE ENTRY

**To remove device entry from database**:

1. Open **Creating White List** dialog (see "Adding white list").
2. Select and right-click device instance or model in device database table. In the drop-down menu, select **Delete device**.
3. In confirmation dialog click **OK**.

### 6.4.3.6.3 Defining Entry Validity Period

Each device instance or model from the white list has an access permission displayed separately. This item's
(permission's) default validity period is practically infinite (from 01.01.1753 to 31.12.9999). You can limit full access
period for this device. This device will be subject to general rules (DM) that apply to this device type before and after the
specified period.

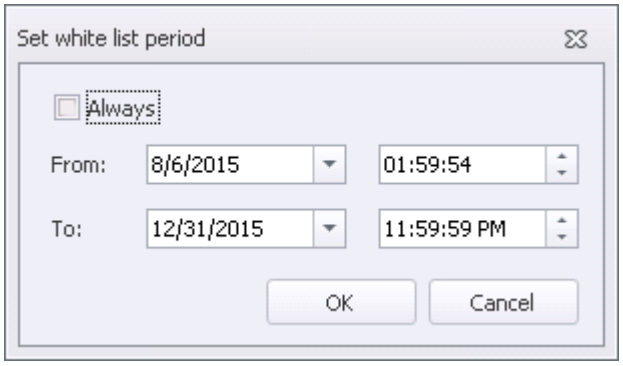
**To set white list entry period**:

1. Go to **White Lists**.
2. In **White Lists** area of Navigation pane select white list that contains the item.
3. If white list items are grouped in (for example, by the type of devices), expand them (see "Grouping Entries
   ").

> **Note:**
>
> If you set validity period for the entire group, the change will only take effect for the first item of the
> group.

4. Select the row that contains device instance or model you want to assign validity period to and take one of
   the following steps:
   - select **Edit > Edit Item** in the Main Menu;
   - click **Edit Item** at the top of **Permitted devices** area;
   - double-click selected entry name;
   - right-click entry row and select **Edit Item** from drop-down menu.

   This opens **Set white list item period** dialog.




5. Set item validity period and click **OK**.

### 6.4.3.6.4 Editing White List

**To edit white list parameters**:

1. Go to **White Lists**.
2. In **White Lists** area of Navigation pane select the name of white list.
3. Take one of the following steps:
   - in the Main Menu, click **Edit > Edit**;
   - click **Edit** at the top of Navigation pane;
   - double-click selected white list name.

   These actions open **Edit white list** dialog box. This dialog is similar to **Creating white list** dialog with the exception of **Select, who will have access to devices** area, which is unavailable.
4. You can add or remove devices from database, if needed (see "Adding Device to Database" and "Removing Device from Database"). You can also change the description of previously registered device: to do this select the device in the index and click **Edit** button at the right of the window. In the opened window change the description text and click **Save**.
5. Add or remove flags in device database table to change the catalog of models and instances in the white list.
6. Click **Save**.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save your security schema, all changes will be discarded.

### 6.4.3.6.5 Deleting White List

**To delete white list**:

1. Go to **White Lists** section.
2. Click the white list you want to delete.
3. Take one of the following steps:
   - select **Edit > Delete** in the Main Menu;
   - click **Delete** at the top of Navigation pane..

4. In confirmation box click **Yes** to confirm that you want to remove the white list.

> **Warning!**
>
> To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
> your security schema, all changes will be discarded.

## 6.4.3.7 Signatures

File Monitor rules (DM) can be configured to affect only files of specific structure distinguishing defined file format. To do
this, InfoWatch Device Monitor defines file format basing on its signature.
**Signatures** section contains a list of signatures which the System can recognize. Signatures are conveniently
grouped into **categories**.

**To view available signatures**:

1. Go to **Signatures** by clicking the Signatures button in Navigation pane or selecting in Main Menu Go > **Signatures**.
   **Signatures** area of Navigation pane displays a list of signature categories.
2. Select a signature category from the list.
   Main screen workspace will display a list of all signatures in the selected category.

> **Warning!**
>
> Predefined signature categories cannot be edited or deleted. You can't create new signatures.

You can do the following:

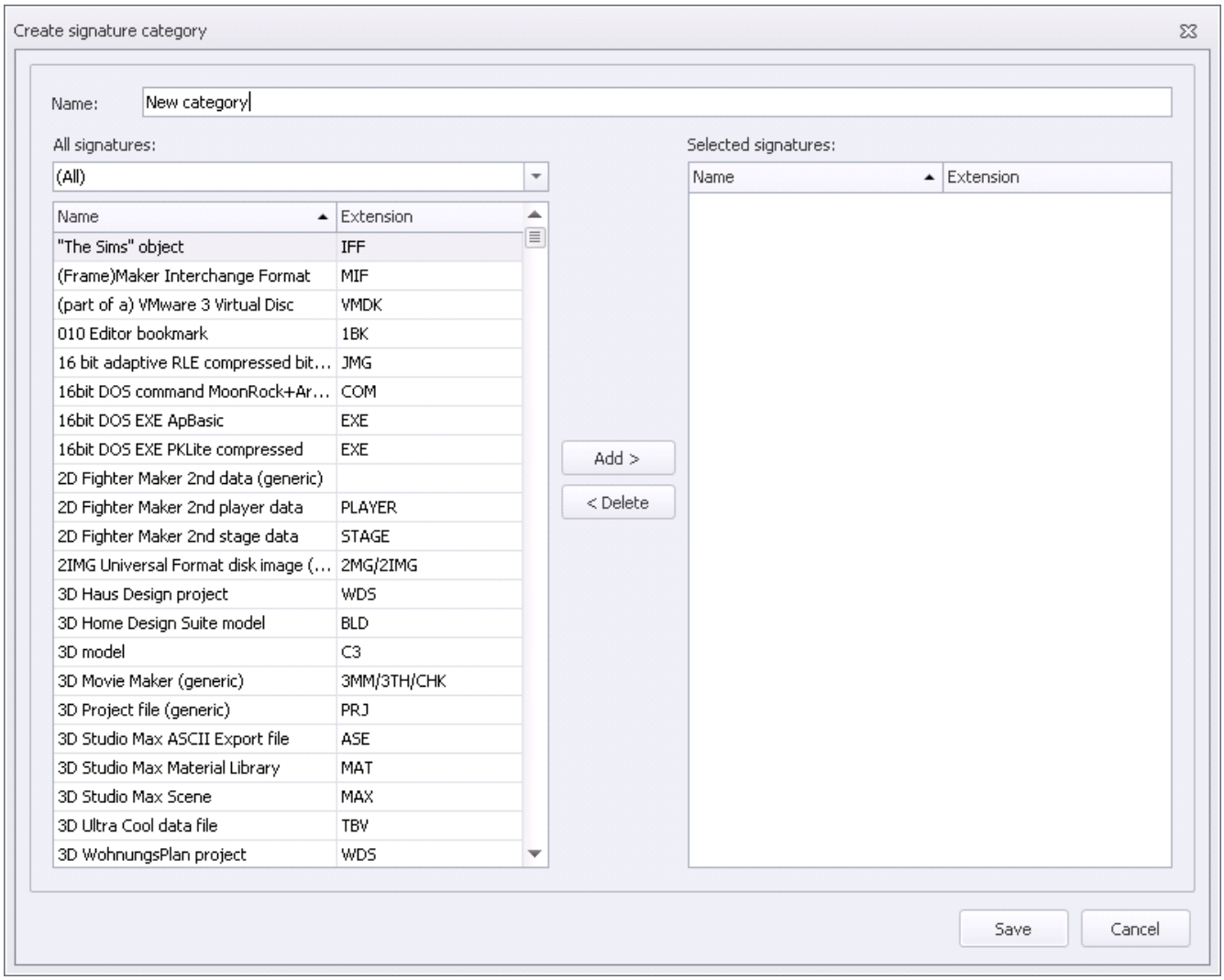
- create signature categories;
- fill created categories by copying predefined signatures;
- delete your signature categories, if they are not used by any rule.

### 6.4.3.7.1 Adding Signature Category

**To add signature category:**

1. Go to **Signatures**.
2. Take one of the following steps:
   - in the main menu select **Edit > Create signature category**;
   - click  **Create signature category** at the top of Navigation pane..

**Create signature category** dialog appears.




3. Enter new category's name..
4. In **All signatures** area you can select one of preset categories from the list. All preset signatures are displayed by default.
5. In the left panel select signatures you want to add to a new category.

   To delete signatures from the list of included to a new category selected them at the right panel **Selected signatures** and click **Delete**.

   To select several signatures hold **Ctrl** or **Shift** button.

   To move selected signatures to a new category click **Add**.

   To delete signatures from the list of included to a new category selected them at the right panel **Selected signature**s and click **Delete**.
6. Click **Save**.

### 6.4.3.7.2 Editing Signature Category

After you have created a signature category (see "Adding Signature Category"), you can fill it. For this, do either of the following:

- in the signature category editing dialog (select a category and click **Edit > Edit** in the Main Menu or click **Edit** at the top of Navigation pane, or double-click the selected category name), define the list of signatures as described in "Adding Signature Category".

or

- copy signatures from other categories directly in the Console workspace.

**To copy a signature from one category to another**:

1. Go to **Signatures** section.
2. In **Signatures** area of the Navigation pane, select the name of a predefined category that contains the signature you want to copy.
3. In the main window workspace, select a row that contains the name of the signature you want to copy. You can select multiple signatures with **Ctrl** or **Shift**.
4. Click and hold the selected row, then drag the pointer to **Signatures** area of Navigation pane. Move the pointer over the category you created earlier where signatures will be added. Release the button when a yellow arrow appears next to the selected category.

As a result, the signature will be copied to the selected category.

**To remove a signature from the category**, select the signature and do either of the following:

- click **Remove signature from category** at the top of **Signatures** area;
- right-click and select **Remove signature from category** in the drop-down menu;
- press **Delete** key.

### 6.4.3.7.3 Deleting Signature Category

**Warning!**

The following categories cannot be deleted:

- signature categories used by any File Monitor rule (DM)
- predefined signature categories.

**To delete a signature category:**

1. Go to **Signatures**.
2. Click the signature category name.
3. Take one of the following steps:
    - in the main menu select **Edit > Delete**;
    - click **Delete** at the top of Navigation pane.

4. In the next confirmation dialog select Yes to confirm that you want to remove signature category.

**Warning!**

To apply changes you have to save current security schema (see "Editing Security Scheme"). If you don't save
your security schema, all changes will be discarded.

## 6.4.3.8 Application Protocol

After the InfoWatch Device Monitor Client is installed onto the computer (computer or mobile device) and the
computer is rebooted, the System automatically starts to receive data on applications launched on managed
workstations and installed on managed mobile devices.
Data on all launches and installations produces an *application protocol*.

**Warning!**

Application protocol excludes system vital applications. One can not forbid application which absence is
obstructive for computer properly operation.

Managing the application protocol is performed in the **Applications** section. To go to this section click Applications button located on the Navigation pane or select **Go > Applications** command in the main menu.

The Navigation pane is divided onto two groups in this section: **List of applications** and **Applications Protocol**:

- The **List of applications** group contains lists used to control employee's access to applications:
    - forbid launching applications in one of two modes: white lists and black lists. See details in "Configuring Application Monitor Rule (DM)".
    - forbid screenshots creating. See details in "Configuring ScreenShot Control Monitor Rule (DM)";
    - automatic creating the screenshots by the System ( see "Configuring ScreenShot Monitor Rule (DM)".
- The **Applications Protocol** group is intended for creating filters showing data on all applications launched on
managed workstations and installed on managed mobile devices. In this group you can add applications to
lists.

One can find information about working with protocols and application lists in the following articles:

- Creating an application list and adding applications;
- Creating and editing the application protocol filter;
- Adding Application to List Automatically;

- Adding Application to List Manually;
- Exporting Application Protocol.

### 6.4.3.8.1 Creating an Application List and Adding Applications

To manage white and black application list, the System offers application lists creation from the **Application protocol** (see "Application protocol").
Lists are used to permit or forbid application usage on computers.

**To create an empty application list**:

1. Go to **Applications** section..
2. On the Navigation pane set the cursor on the **List of applications** group and take one of the following steps:
   - in **List of applications** group menu click **Create list of applications**;
   - select **Edit > Create list of applications** command in the main menu;
   - right-click in the **List of applications** group and select **Create list of applications** from the dropdown list.
3. In the **List Name** field enter a name for a list you create.
4. Click **Save**.

Details on filling lists and creating lists from application protocols see "Adding Application to List Automatically"

and "Adding Application to List Manually".

**To select an application from the list**:

1. Go to **Applications** section.
2. Set the cursor on the **List of applications** group.
3. Click in **List of applications** group menu.
4. Select application(s) from list(s) and click **Add applications to the list**.
5. From the drop-down list select **Add applications automatically** or **Add applications manually**.

**To edit application in the list**:

1. Click button on the **List of applications** group.
2. You can edit details which will be used to filter the application (see "Adding Application to List Manually").

**To delete application from the list**:

1. Click button on the **List of applications** group.
2. Click **Yes** to delete application from the security scheme.

in List of applications group menu click Create list of applications

### 6.4.3.8.2 Creating and Editing the Application Protocol Filter

Filters allow to configure an application protocol (see "Application protocol") to display an information on applications corresponding to your conditions only.

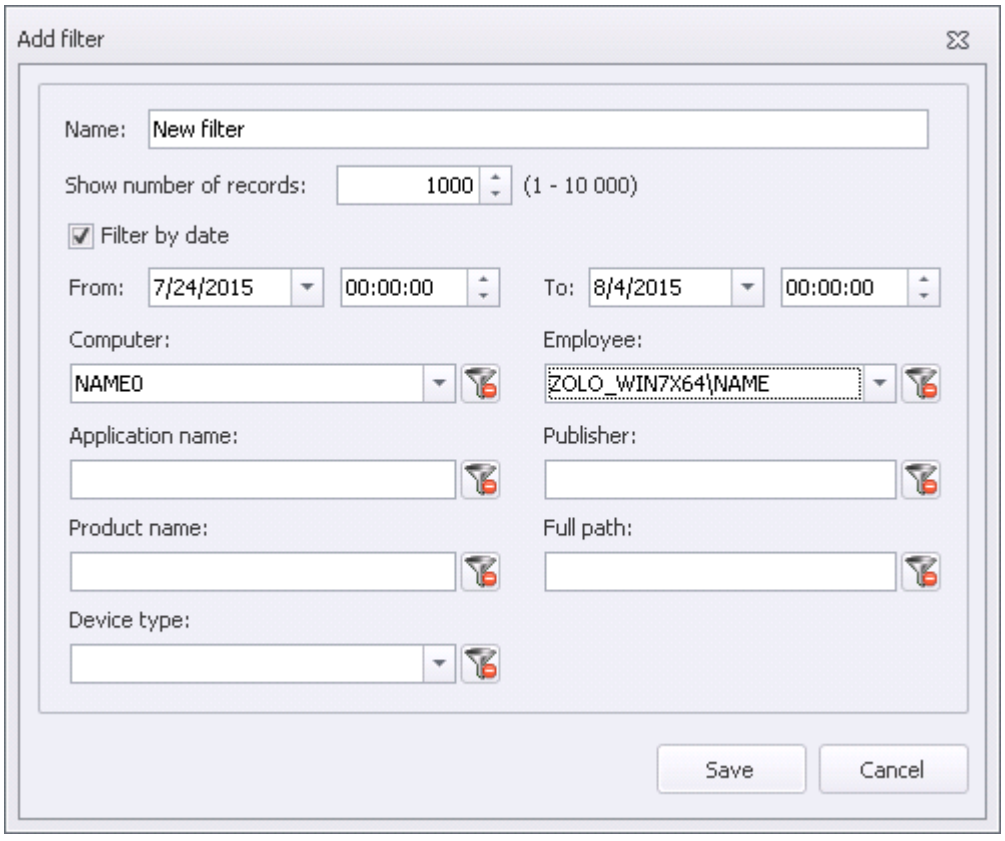
**Warning!**

Preset **Today** filter shows applications which have been started on particular day since initial installation of the
Client.
**All** filter shows applications which have been started right upon Client installation.

**To create a new filter**:

1. Go to **Applications** section.
2. On the Navigation pane set the cursor on the **Application Protocol** group and take one of the following
steps:
   - in the click button in **Application Protocol** group on Navigation pane;
   - select **Edit > Create filter** command in the main menu;
   - right-click in the Application Protocol group and select **Create filter** from the drop-down list.

   This opens a dialog box with filter parameters.




3. Enter the name of the filter in **Name** field.
4. In the **Show number of records** field enter the number of records you want to see in the protocol.

5. To set up period for the records to be displayed flag the **Filter by date** option and specify parameters **From** and **To**.
6. If needed, specify additional filter conditions:
    - in **Computer** field select employee's computer which protocol you need to view;
    - in **Employee** field select account of employee which launches applications;
    - in **Application name** field type in the name of the application you want to see information about;
    - in **Publisher** field type in the program publisher;
    - in **Product** name field pick the name of the product;
    - in **Full path** specify the path to the application location;
    - from **Device type** drop-down list select whether the filter should display information on applications
      launched on computers or installed on mobile devices.

    Click button to delete filter.
7. Click **Save**.

**To edit filter**:
Click button in **Application protocol** on Navigation pane or press **Ctrl+E**.

**To delete filter**:
1. Click button in **Application protocol** on Navigation pane or press **Ctrl+D**.
2. Click **OK** to confirm deletion.

### 6.4.3.8.3 Adding Application to List Automatically

The System allows to fill application lists automatically using data received from the application protocol.

**To add application to the list automatically**:

1. Go to **Applications** section.
2. On the Navigation pane select the needed filter in the **Application protocol** group.
3. On the **Application protocol** pane select one or several entries. To select several entries click at them
   while pressing **Shift** or **Ctrl** button.
4. Take one of the following steps:
    - on the **Application protocol** pane click **Add application to list automatically**;
    - select **Edit > Add application to list automatically** command in the main menu;
    - right-click in the **Application Protocol** pane and select **Add application to list automatically**
      manually from the drop-down list.
5. In the appeared window:
    - select existing list

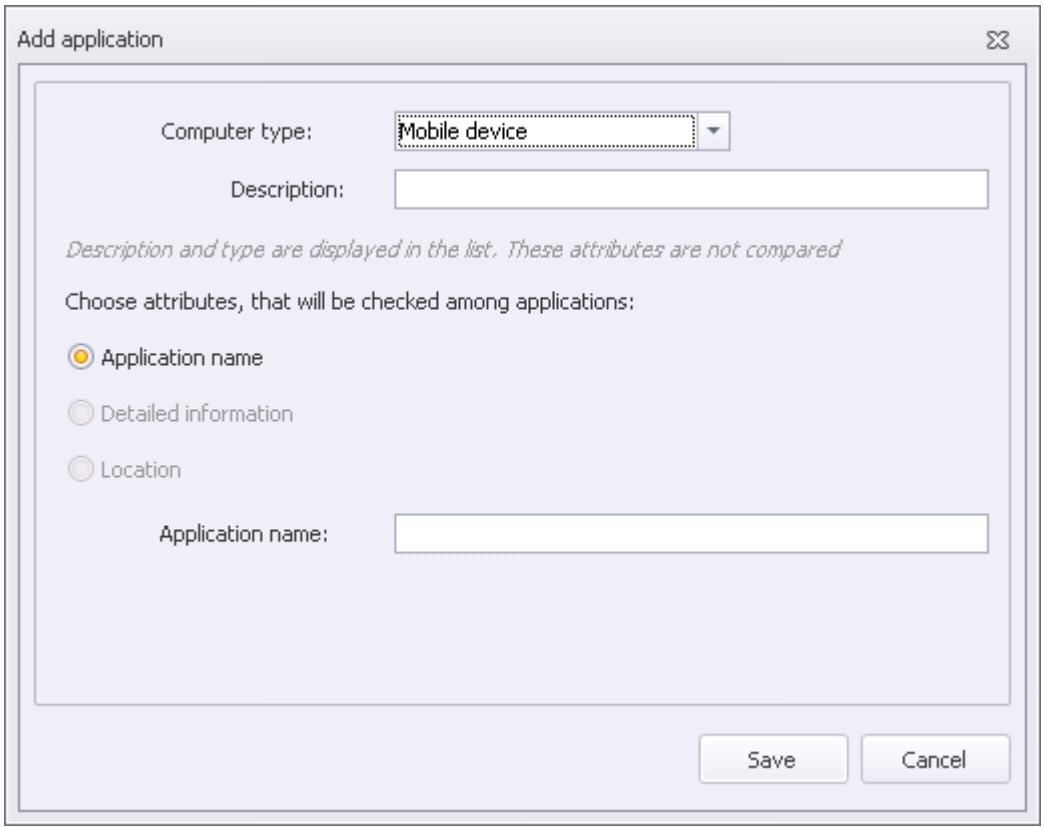
or

6. click **Create new** then enter a list name to the **List name** field and click **Save**.
7. Click **Select**.
8. Click **OK**.

### 6.4.3.8.4 Adding Application to List Manually

**To add application to the list manually**:

1. Go to **Applications** section.
2. On the Navigation pane select the needed filter in the **Application protocol** group.
3. On the **Application protocol** pane select one or several entries. To select several entries click at them
   while pressing **Shift** or **Ctrl** button.
4. Take one of the following steps:
   - on the **Application protocol** pane click  A**dd application to list manually**;
   - select **Edit > Add application to list manually** command in the main menu;
   - right-click in the **Application Protocol** pane and select **Add application to list manually** manually from the drop-down list.
5. In the **Add application** window you can set parameters of checking application correspondence:
   - **Application name**
     Enter the full name of the application file
   - **Detailed information**
     Filtering application by detailed information of Publisher, Product Name, Application Name.
   - **Location**
   - Filtering application by detailed information of **Location** (type in path to the file up to the folder), **Application name** (type in the file name).




6. Click **Select**.
7. If you have selected several entries, repeat steps 5 and 6 for other entries.
8. Click **OK**.

Filtering application by detailed information of Publisher, Product Name, Application Name.

#### 6.4.3.8.5 Exporting Application Protocol

**To export the application protocol**:

1. Go to **Applications** section.
2. On the Navigation pane, in the **List of applications** group, select the needed protocol.
3. In the **List of applications** group menu click **Export application protocol**.
4. Specify export location and click **Save**.

The protocol will be exported in .**xls** format.

## 6.4.4 Temporary Employee Access to Network

An employee for which a rule (DM) denying connections outside corporate network is active (see "Settings of Corporate Network" and "Configuring Network Monitor Rule (DM)"), can request temporary access to external connections from InfoWatch Device Monitor Client menu, **Network control** command.

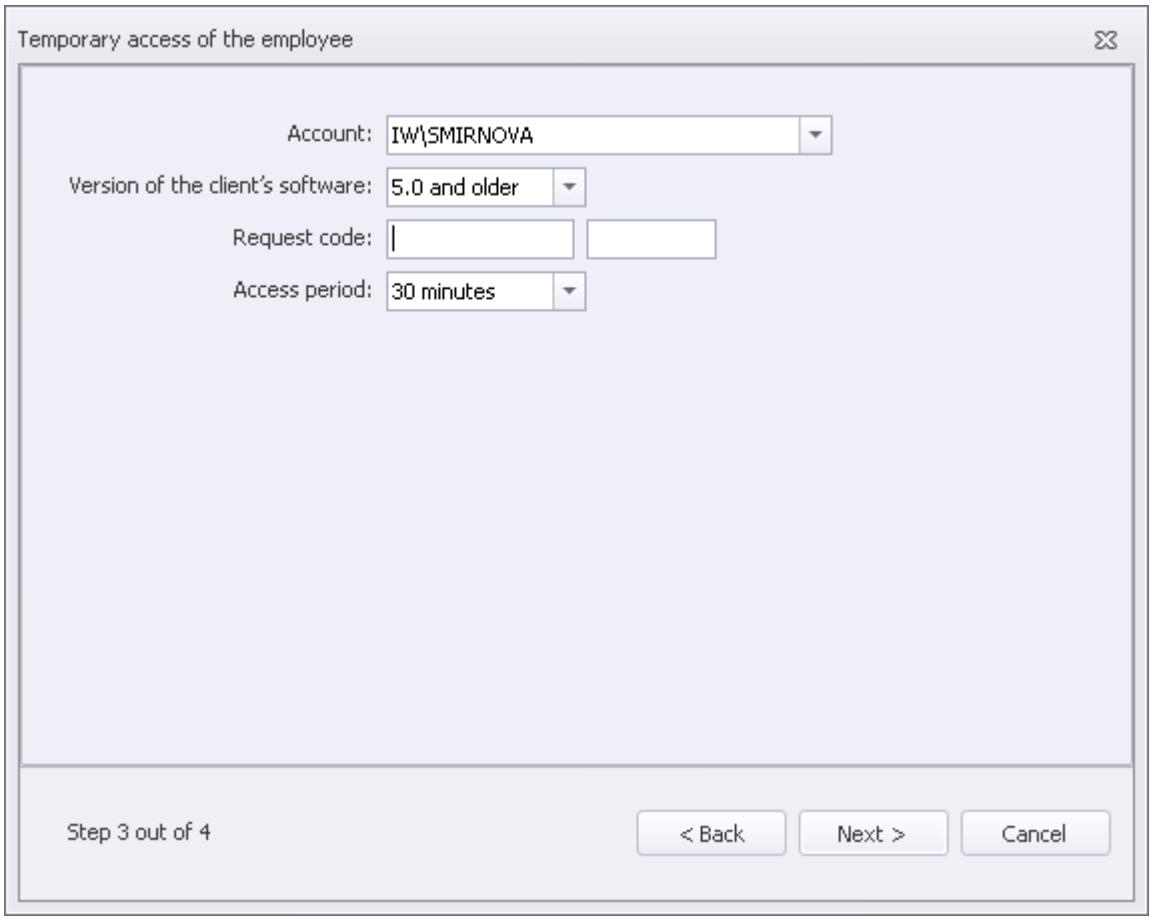
**Warning!**

An employee can request an access only if the Show tray icon interface option is selected (see "Common Settings for Clients"). The way how to configure text displayed to an employee is described in "Employee Notifications about Policy (DM) Violations", **"Network connection forbidden. Detailed**" notification type.

An employee should send received request code to security officer.

**To grant an access to external connections for employee**:

1. In Main Menu select **Tools > Temporary employee access**.
2. In the dialog window choose **Dictated by phone**, click **Next**:
3. Choose option **To the network**, click **Next**.




4. From **Account** drop-down list select an account of employee to which a temporary access should be granted.
5. In **Version of client's software** choose version of Device Monitor Client installed on employee's computer.

**Note:**

When not sure about client's version, choose **4.1** or **4.2**.

6. To **Request code** field enter a code sent by employee.
7. From **Access period** drop-down list select time period for which a temporary access should be granted.
8. Click **Next**.
   The code which should be sent to employee is displayed in **Response code** field.
9. Click **Close**.

## 6.4.5 Temporary Employee Access to Devices

An employee for which a rule (DM) denying using devices is active (see "Configuring Device Monitor Rule"), can request temporary access to a device from InfoWatch Device Monitor Client menu, **Device list** tab.

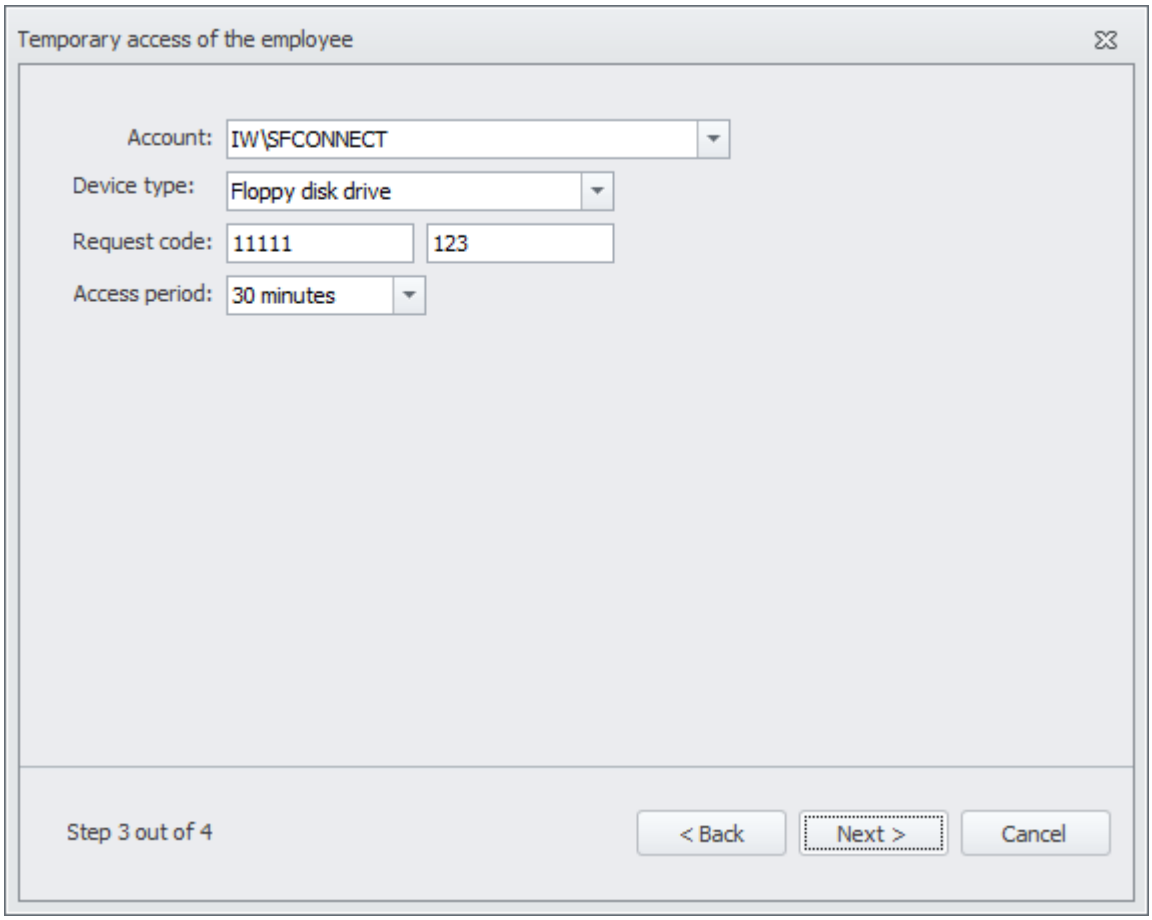
**Warning!**

An employee can request access only if the **Show tray icon** option is selected (see "Common Settings for Clients"). On to configure the text displayed to the employee, see "Employee Notifications about DM Policy Violations", "**Access to device denied**" notification type.

The employee should send a received request code to the security officer.
You can communicate with the employee using phone or e-mail.

**To grant temporary access to devices for an employee who called by phone**:

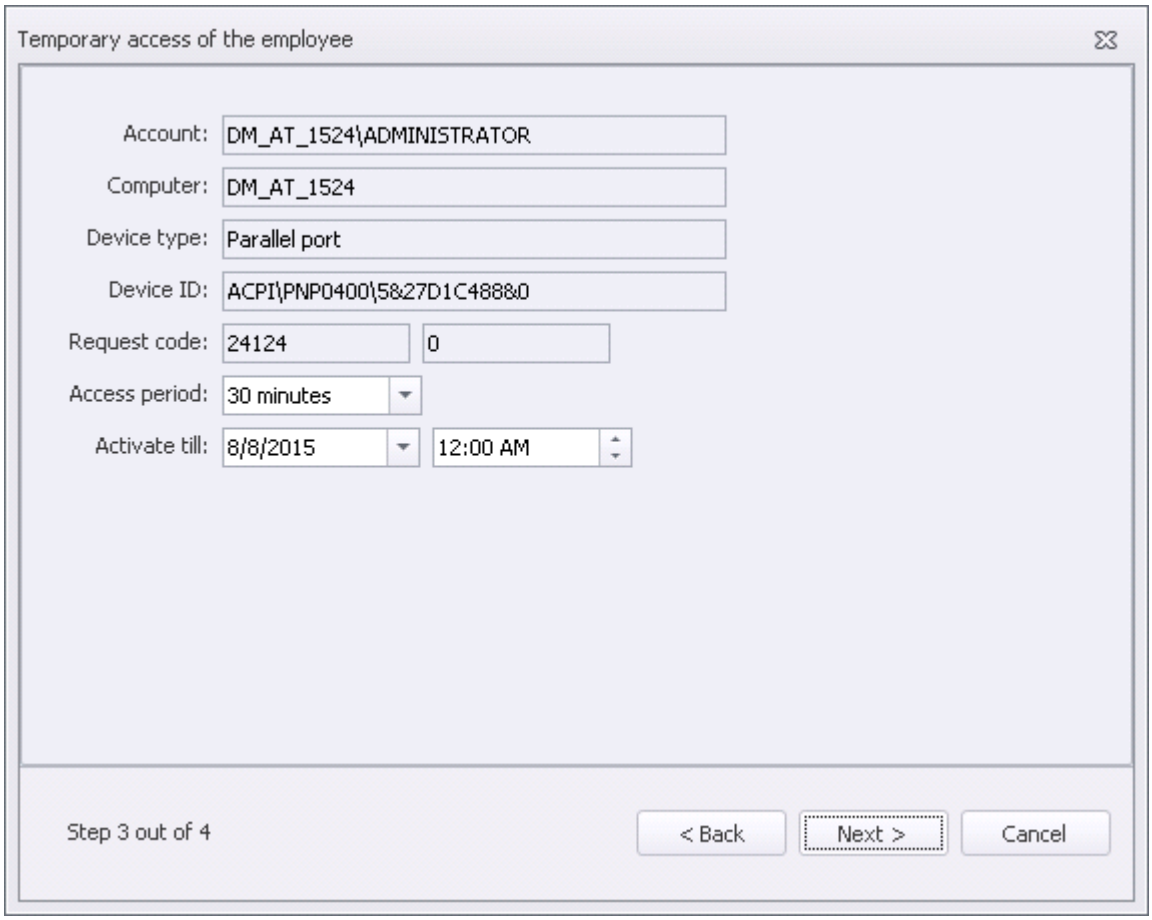
1. In Main Menu select **Tools > Temporary employee access**.
2. Select **Dictated by phone (digital text code)**, click **Next**.
3. Select **To the device**, click **Next**.




4. From the **Account** drop-down list, select an account of the employee to which temporary access should be granted.
5. From the **Device type** drop-down list, select the necessary device type.
6. In the **Request code** field, enter the code dictated by the employee.
7. From the **Access period** drop-down list, select the time period for which temporary access should be granted.
8. Click **Next**.
   The code you should provide to the employee is displayed in **Confirmation code** field.
9. Click **Finish**.

**To grant access to devices for employee who sent an e-mail**:

1. In Main Menu select **Tools > Temporary employee access**.
2. Select **Obtained via e-mail or other means of communication (query text code)**, click **Next**.
3. In the **Enter request text** field, enter the code sent by the employee, and click **Next**.




4. From the **Access period** drop-down list, select the time period for which temporary access should be granted.
5. From **Activate till** drop-down lists, define the time period, when the employee can activate access to the device (after the activation, access will be provided for the time selected from **Access period** drop-down list).
6. Click **Next**.
   The code which should be sent to the employee is displayed in **Copy answer text to clipboard** field.
7. Click **Finish**.

# 6.5 Viewing Events

InfoWatch Device Monitor Clients installed at managed computers provide keeping data on using external devices, transferring data via network connections and using instant messengers for data transfer. This information is stores as **events** and transferred to InfoWatch Device Monitor servers along with data of shadow copies. Events (unlike shadow copies) are registered in InfoWatch Device Monitor database and are available from Management Console (DM).
You can define the information logging level (keep all information on access attempts, policy (DM) violations only or save nothing) in general settings of your security schema: for further details see "Common Settings for Clients".

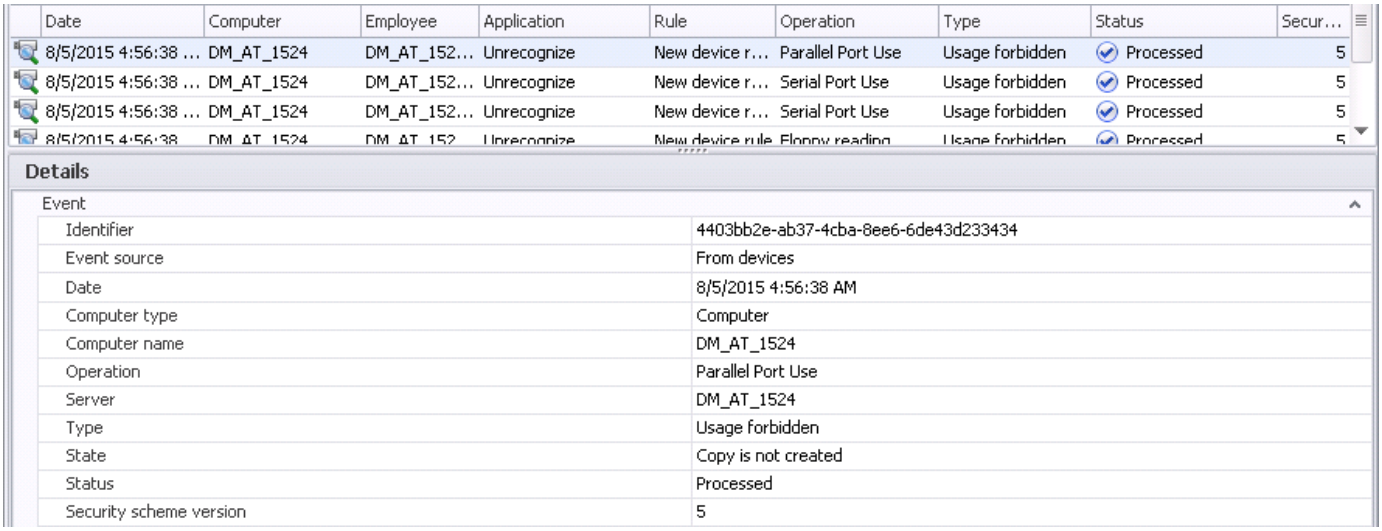
You can view events in **Events** section. To go to this section, click **Events** button on Navigation pane.

**To view events**,
click the filter name in the filter list.
There are two predefined filters:

- **Last: 4 hours**
- **Today**

You can create custom filters to view events, as described in "Event Filters".

Event information is displayed in a tabular list where each row contains a single record. Columns contain basic properties of log entries. Extended information on each record is available in **Details** panel.




| Attribute name | Description | Available values |
|---|---|---|
| **Common attributes** | | |
| Identifier | Unique event number | |

| Attribute name | Description | Available values |
|---|---|---|
| Event source | Interceptor-based event type | • **File** – File Monitor;<br>• **Devices** – Device Monitor;<br>• **Printer** – Print Monitor;<br>• **Skype, XMPP, MMP, WhatsApp, SMS** – IM Client Monitor;<br>• **FTP/FTPS** – FTP Monitor;<br>• **HTTP/HTTPS** – HTTP(S) Monitor;<br>• **Mail** - Mail Monitor;<br>• **Network** – Network Monitor;<br>• **Mobile device camera** - Photo Monitor;<br>• **System** - event on ending disc space for shadow copy saving. *Such event is not transferred to Traffic Monitor.* |
| Date | Event date and time (in hours and minutes) registered on computer. Device Monitor server keeps an event in UTC, and Management Console (DM) displays it according to the local time of a computer where Console (DM) installed | |
| Computer type | Indicates if the computer where the event arisen is the workstation or mobile device | • Workstation<br>• Mobile device |
| Computer name | Name of the computer that registered the event | |
| Operation | Employee initiated action or attempt | |
| Server | Name of InfoWatch Device Monitor server the<br>Client transmits event information to | |
| Application | Executable file name and/or name of the process responsible for the action, if detected | |

| Attribute name | Description | Available values |
|---|---|---|
| Type | Action-based event type | • **Record** – adding or changing data (including renaming) on external device; sending files via messenger; sending print jobs to printer; sending data via FTP/FTPS.<br>• **Use** – connecting an external device that allows unmonitored read/write operations or sending messages;<br>• **Violation** – IM Client interceptor user-initiated violation;<br>• **Warning** – user-initiated a ban or didn't give consent to use IM Client plug-in, while monitoring is required by security policy (DM).<br>• **Usage forbidden** – attempt of sending data via forbidden channel. |
| Status | Status of event processing on the server and<br>sending to Traffic Monitor server | • **New**<br>• **Awaiting for proceeding**<br>• **Awaiting for sending to TM**<br>• **Sent to TM**<br>**Note**: If the Server is in standalone mode then the event has the **Processed** status only |
| Security schema version | Number of security schema version that was active on the computer when the event was registered | |
| Operation verdict | Attribute of allowed action. For Devices events (**Device Monitor** rule) the blocking is also available. | • **Allowed**<br>• **Forbidden** – only for Devices events<br>• **Unprotected data copying is disabled** – only for Devices events<br>• **Allowed (in white list)** - for whitelisted device events |
| Employee | Name of the domain (computer name outside the domain) and user login used for event registration or operating system reference for<br>events outside user sessions | |
| Rule (DM) | Name of policy (DM) rule (DM) managing the event | |
| Terminal client | Terminal client name, if detected | |

| Attribute name | Description | Available values |
|---|---|---|
| Network address of a terminal client | Terminal client IP, if detected | |
| **For events with *File* source** | | |
| Assign | Full target file name | |
| File size | Target file size | |
| Object status | Shadow copy of transferred data | • **no copies created** - rule (DM) does not require shadow copying<br>• **copy created** - shadow copy created successfully<br>• **copying error** - for example, if there is no free space on the client |
| Device description | Target device instance or model ID | |
| **For events with *Devices* source** | | |
| Device type | For supported device types list see "InfoWatch Device Monitor Functions" | |
| Device instance or model identifier | Model identifier (VID) and serial number (PID) of external device or printer used for the operation | |
| Device description | Device description received from OS of the computer where the Client is installed | |
| **For events with *Skype, XMPP, MMP, WhatsApp, SMS source*** | | |
| IM user ID | UIN of the user authorized in the messenger at computer | |
| Object status | Shadow copy of transferred data | • **no copies created** - rule (DM) does not require shadow copying<br>• **copy created** - shadow copy created successfully<br>• **copying error** - for example, if there is no free space on the client |
| List of senders | UIN of IM users, who sent the message/file via messenger | |
| List of recipients | UIN of IM users, who received the message/file via messenger | |

| Attribute name | Description | Available values |
|---|---|---|
| File name | Full name of transferred file | |
| File size | Transferred file size | |
| Shadow copy | File, message or chat shadow copy | • **No** - no shadow copy was created<br>• **Yes** - shadow copy created successfully |
| **For events with *Printer* source** | | |
| Document | Full name of the file sent to print | |
| Printer | Name of target network printer | |
| Object status | Result of creating shadow copy of the print job | 1. Shadow copy of print job was successfully created. The job contained graphic and text data.<br>2. Shadow copy of print job was not created. The job contained no graphic or text data.<br>3. An error occurred while creating a shadow copy of print job.<br>4. Shadow copy of print job was successfully created. The job contained only graphic data.<br>5. The shadow copy should not have been created.<br>6. Shadow copy of print job was partially created. Graphic data were fully processed. Text data were partially processed.<br>7. Shadow copy of print job was partially created. Graphic data were partially processed. Text data were fully processed.<br>8. Shadow copy of print job was successfully created. The job contained only text data.<br>9. Shadow copy of print job was partially created. Graphic data were partially processed. The job contained no text data.<br>10. Shadow copy of print job was partially created. The job contained no graphic data. Text data were partially processed. |
| Object status | Result of creating shadow copy of transferred data | • <br>○ **no copies created** - rule (DM) does not require shadow copying<br>○ **copy created** - shadow copy created successfully<br>○ **copying error** - for example, if there is no free space on the client |

| Attribute name | Description | Available values |
|---|---|---|
| **For events with *FTP/FTPS* source** | | |
| Object status | Result of creating shadow copy of transferred data | • <br>○ **no copies created** - rule (DM) does not require shadow copying <br>○ **copy created** - shadow copy created successfully <br>○ **copying error** - for example, if there is no free space on the client |
| Sender | Name used for employee authorization at FTP server | |
| FTP server | Name or IP address of FTP server | **Note**: When using the FTP via proxy server this field can contain proxy address instead of FTP. |
| Relative path | Directory at FTP server where to the file is transferred | |
| File name | Full name of transferred file | |
| Real file size | File size calculated after transfer | |
| Declared file size | File size according to data of application which performs a transfer to FTP server (browser for example) | |
| Starting point | When file is transferred by piecemeals, position which starts the of the current part transfer. | |
| Shadow copy | Result of creating file shadow copy | • **No** – shadow copy was not created <br>• **Yes** – shadow copy created successfully |
| **For events with *HTTP or HTTPS* source** | | |
| State | Result of creating shadow copy | • <br>○ **no copies created** - rule (DM) does not require shadow copying <br>○ **copy created** - shadow copy created successfully <br>○ **no free space on disk** - client does not have enough free space <br>○ **copying error** - for example, if there is no free space on the client |

| Attribute name | Description | Available values |
|---|---|---|
| Reciever DNS | DNS name of a computer | |
| Reciever IP | IP-address of a computer | |
| Request size | Size of a request in Kbps | |
| Rule (DM) | Name of policy (DM) rule (DM) managing the event | |
| **For events with *Mail* source** | | |
| State | Result of creating shadow copy | • <br>○ **no copies created** - rule (DM) does not require shadow copying<br>○ **copy created** - shadow copy created successfully<br>○ **no free space on disk** - client does not have enough free space<br>○ **copying error** - for example, if there is no free space on the client |
| Sender | DNS name of a sender computer | |
| List of recipients | Receiver addresses | **Note**: For events with a large number of senders you should remember that when Device Monitor Management Console can't display more than 1024 symbols in this field.<br>However, if the shadow copy is set for this event then Traffic Monitor will receive and display the full list of recipients (under 4000 Bytes). |
| Subject | Mail Subject | |
| Transmission type | Used protocol | |
| Message type | Mail direction | • **Incoming**<br>• **Outgoing** |
| Size, bite | Size in bites | |
| Channel type | Encrypted or not encrypted | • **All channels**<br>• **Encrypted channel** |
| Rule (DM) | Name of policy (DM) rule (DM) managing the event | |

| Attribute name | Description | Available values |
|---|---|---|
| **For events with *Network* source** | | |
| Time of ban removal starts | For *Network* operations temporary ban removal operation - start of temporary access period. See details in "Temporary Employee Access". | |
| Time of ban removal ends | For *Network* operations temporary ban removal operation - end of temporary access period. See details in "Temporary Employee Access". | |
| Connection server | For *Connection forbidden* operation - address or name of forbidden server which was attempted to gain access to | |
| Port | For *Connection forbidden* operation - port number used for connection attempt. | |
| **For events with *Mobile* device camera source** | | |
| Photo size | Size of photo shadow copy, in bytes | |

If needed, you can free some space in the database by deleting all the information about already processed events
(Processed or Sent to Traffic Monitor state). See details in "Deleting Events".

## 6.5.1 Event Filters

In addition to predefined filters you can create custom filters to view event information.

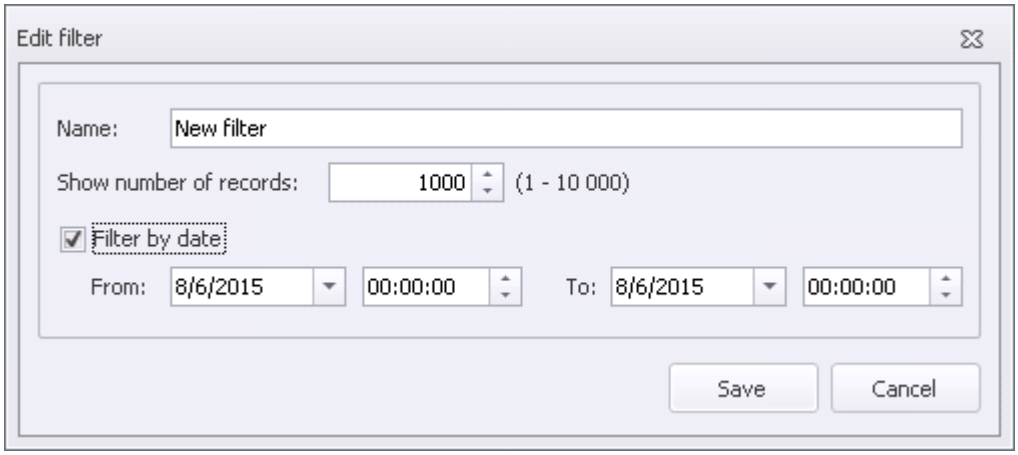
**To add or edit a filter**:

1. Go to **Events**.
2. Follow the necessary steps:

| Action | Steps |
|---|---|
| Creating filter | • in Main Menu select **Edit > Add Filter**;<br>• click  **Add Filter** at the top of Navigation pane. |

| Action | Steps |
|---|---|
| Editing filter | 1. In **Events** area of Navigation pane, select the name of the filter you want to edit. 2.Take one of the following steps:<br>• in Main Menu click **Edit > Edit Filter**;<br>• click **Edit Filter** at the top of Navigation pane;<br>• double-click selected filter name. |

These actions open Edit filter dialog.




3. Specify filter options in **Edit Filter** dialog:
   - **Filter Name**.
   - **Show number of records**. Limit on the number of entries displayed in Management Console (DM) workspace (1000 records by default).
   - To filter by a date, flag **Filter by date** box and specify the desired period in From and To fields. Set the date and time in right and left field respectively.

> **Note:**
>
> For the predefined filters **Filter Name** and **Filter by date** parameters cannot be edited.

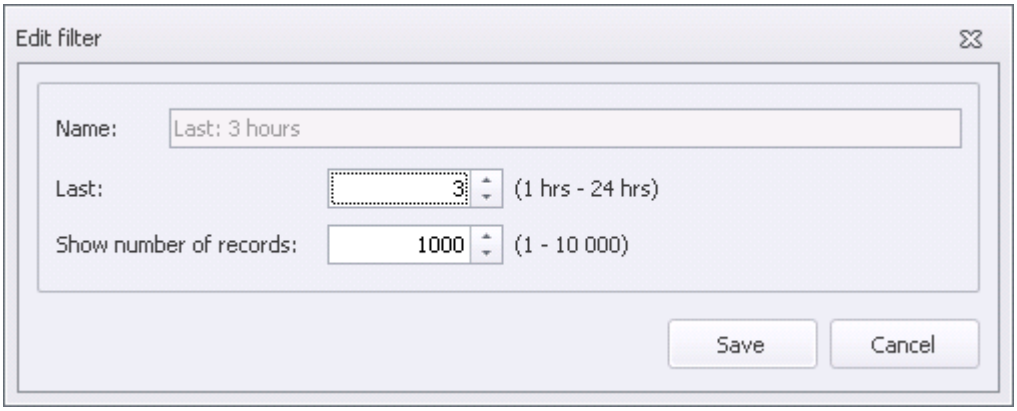
4. Click **Save**.

The predefined filter **Last: 4 hours** has another editing interface and lets to make filters displaying events for last
several hours.

**To edit predefined filter to view events for the selected number of hours**:

1. In **Events** area of Navigation pane, select the **Last: 4 hours** filter.
2. Take one of the following steps:
   - in Main Menu click **Edit > Edit Filter**;
   - click **Edit Filter** at the top of Navigation pane.

- double-click the filter name.




3. Specify filter options in **Edit Filter** dialog:
   - **Last**. Specify the number of hours, entries for which should be displayed in the Management Console (DM) workspace.
   - **Show number of records**. Limit on the number of entries displayed (1000 records by default).
4. Click **Save**.

## 6.5.2 Deleting Events

The information about already processed events (**Processed** or **Sent to Traffic Monitor** state) can be deleted.

You can delete events:

- for certain time period;
- all matching certain filter.

**To delete from the database an information about events for a period**:

1. Go to **Events**.
2. Take one of the following steps:
   - click **Delete events** at the top of Navigation pane.
   - in Main Menu click **Edit > Delete events**.
3. In the opened dialog window **Deleting from database**, specify needed time period for which you want to delete events.
4. Click **Delete**.

Then a number of deleted events will be displayed.

**To delete from the database an information about events matching certain filter**:

1. Go to **Events**.
2. In the filter list select needed filter name.
3. Take one of the following steps:
   - click **Delete filter events**at the top of **Events** area.

- in Main Menu click **Edit > Delete filter events**.

4. In request box select **Yes** to confirm.

Then a number of deleted events will be displayed.

# 6.6 Clients Remote Installation, Updating and Uninstallation

You can install, update, or delete InfoWatch Device Monitor Clients from a computer via InfoWatch Device Monitor
Management Console (DM). These operations are performed through **tasks**. You can run tasks to install, update or
remove client software, change uninstallation password, or monitor these processes.

Remote client management is carried out by special **Distribution Agent** transmitted onto client workstations. The
Agent requires the following:

- Target computers must meet hardware and software requirements: see document "Traffic Monitor. Installation guide", article "InfoWatch Device Monitor Client Hardware and Software Requirements".
- Proactive virus protection for computers must be turned off at the time of installation.
- Device Monitor server and target computers should resolve each other by domain names.
- On computers, where firewall, different from windows standard one, is installed, it should be disabled. Except
  for disabling, you can also allow any network connections for the following Device Monitor components:
  `IWDeployAgent.exe, iwdmc.exe, DM.Client.exe, IWProxy.exe, rmtlogctr.exe.`

**Note:**

To install Client on Windows 7 computer, go to **Control Panel -> Network and sharing center -> Change advanced sharing settings**. Enable file and printer sharing. Upon completion, **Distribution**
**Agent** can be copied to computer. Firewall will be automatically configured.

To go to Management Console (DM) task section, use **Tasks** button on Navigation pane.

Tasks management guidelines are available in:

- View Tasks;
- Preparing Primary Client Installation;
- Creating Primary Distribution Task;
- Creating Update Task;
- Creating Uninstallation Password Reset Task;

- Creating Uninstallation Task;
- Launching, Pausing, Editing, and Deleting Tasks;
- Client Installation Errors.

You can also install and upgrade your Client with software distribution tools (for example, via Microsoft Active Directory group policies (DM)). For more information see document "Traffic Monitor. Installation guide", article "Client Installation via Software Distribution Tools". To run these operations, use installation package that was created as described in "Creating Installation Package".

## 6.6.1 Viewing Tasks

**Tasks** area of Navigation pane displays a list of all created, executed and outstanding tasks. Main screen work pane displays a list of target computers for the selected task.

**Details** panel displays the following parameters for selected task:

| Parameter | Description |
|---|---|
| Name | Original name of the task |
| Description | Original description of the task |
| Type | One of the following task types:<br>• Primary distribution<br>• Change password<br>• Update<br>• Uninstall |
| Status | Current task status. Possible values:<br>• Executing<br>• Stopped<br>• Completed |
| Restart period, min | Intervals between task launches on computer, if the previous attempt failed, in minutes. Counted from ending the last workstation proceeding in previous task launch. If the task fails, it won't be launched again. |
| Number of restart trials | Maximum number of retries to restart distribution task on computer. After all attempts have been used, **Task status** parameter value will be set to **Error** (for further details, see "Client Installation Errors"). |
| **For primary distribution tasks** | |
| Show employee notifications | Indicates that employee's attempt to perform a banned action will trigger a warning. For further details, see "General System Settings", "Creating Installation Package" and "Employee Notifications about Policy (DM) Violations" |

| Parameter | Description |
|---|---|
| Hide presence of agent on workstation | Indicates if Windows system tray of managed computer hides Client presence on the computer. Otherwise, Windows system tray of the computer where Client installed will display  icon. By clicking this icon, an information on DM Client operation and list of currently controlled devices is displayed.<br>**Warning!** If there is an antivirus protection enabled on the managed computer then the antivirus program can reveal the operation of Device Monitor: for example, in the list of processes running on the managed computer or in the list of programs that initiate a control. |
| Install the component of network connections control | Indicates if iw_proxy component is installed. |
| Install the component of network connections control | Indicates if Network Monitor interceptor is installed. |
| Uninstallation product password | Shows if the password requested from employee that attempts to remove Device Monitor Client. |
| Proxy Root Issuer DN | The unique name of Device Monitor proxy server certificate, issuer distinguished name. |
| **For primary distribution and update tasks** | |
| Installation directory | Installation directory for Device Monitor Client at target computers. |
| Installation login | Name of the Console (DM) user that launches the task on computers. |
| Waiting fir restart duration, hours | Computer reboot waiting period (in hours); if the computer is not restarted manually during this period, the System will notify the employee (if notifications are enabled), and force operating system restart. |
| Duration of restart notifications, hours | Period of displaying requests for rebooting computer, in hours. |
| Restart notifications rate, min | Time intervals between repeated reboot requests, in minutes. |
| Reboot messages | Text displayed to the employee in reboot request. |
| Show a warning before forced reboot | Indicates if a notification about forced reboot will be displayed when reboot wait durations are expired but employee did not reboot the computer. |
| **For change password tasks** | |
| Uninstallation product password | Shows if the password requested from user that attempts to remove Device Monitor Client. |

Each target computer's main screen workspace displays the following parameters:

| Parameter | Description |
|---|---|
| Address | Computer IP address or domain name |
| Status | Current status of task for the relevant computer. Possible values:<br>• **Not running**<br>• **Prepare to start**<br>• **In progress**<br>• **Waiting for reboot** (only for installation and upgrade tasks)<br>• **Error** (for further details, see "Client Installation Errors")<br>• **No access**<br>• **Completed** |
| Client version | Client version currently installed on computer. |
| Operation system | Computer operating system. |
| System type | Type of operating system on the computer: x64 or x32. |
| Connections count | Number of connection attempts to unavailable computer. |
| Time | Date and time of the last connection to computer. |

## 6.6.2 Preparing Primary Client Installation. Distribution Agent

Remote client installation is carried out by InfoWatch Device Monitor special **Distribution Agent**.
Correct remote client installation via InfoWatch Device Monitor requires the following:

- Target computers must meet hardware and software requirements: see document "Traffic Monitor. Installation guide", article "InfoWatch Device Monitor Client Hardware and Software Requirements".
- Proactive virus protection for computers must be turned off.
- Computers with the firewall that differ from Windows firewall, that firewall:
    - should be disabled
      or
    - should have a permission for InfoWatch Device Monitor Distribution Agent
      or
    - should have **15505** port (default port by which the Distribution Agent awaits for a connection) opened for
      incoming connections, if it was not changed in connection settings (see document "Traffic Monitor. Installation guide", article "<applicationSettings> section", **CommunicationPort** parameter).

Additional requirements vary depending on distribution method:

**Method 1**:
Distribute `Setup.DeployAgent.msi` installation package (provided along with installation software) to target computers.

**Method 2**:
Transmit Distribution agent through shared administrative resources:

- Computer firewalls must be either turned off, or set required exceptions: see "Firewall Settings".
- Specify settings for network access to shared resources: see "Enabling Shared Administrative Resources".

If all requirements are met, you can start creating and then start primary distribution tasks.

### 6.6.2.1 Enabling Shared Administrative Resources

To transfer InfoWatch Device Monitor distribution agent to target computers through shared administrative resources, the following requirements must be met:

- If computer with Windows XP is outside a domain, in security policy (DM) settings of this computer set **Network access configuration parameter: Sharing and security model for local accounts** value to `Classic`.
- Computers must have their shared administrative resources (like `\\computername\admin$`) enabled (in
  Windows Vista and Windows 7 they are disabled by default). To enable them:
  a. Make sure that sharing of files and printers is enabled. In Control Panel, open **Network and sharing Center -> Change advanced sharing settings**. In desired profile enable file sharing and printer sharing.
  b. In the registry, in `HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System` path, add
  **DWORD (32-bit)** parameter named **LocalAccountTokenFilterPolicy**. Set its value to **1**.

### 6.6.2.2 Firewall Settings

Firewall settings requirements:

| Application protocol | Transport protocol | Port |
|---|---|---|
| RPC | TCP | 135 |
| RPC over HTTPS | TCP | 593 |
| NetBIOS Datagram Service | UDP | 138 |
| NetBIOS Name Resolution | UDP | 137 |
| NetBIOS Session Service | TCP | 139 |
| SMB | TCP | 445 |

For computer availability defining quickness the ICMP protocol should be permitted.
For Windows firewall the "**File printing and sharing**" preset rule should be permitted.

## 6.6.3 Creating Primary Distribution Task

Primary distribution (installation from Management Console (DM)) of InfoWatch Device Monitor Client using installation **agents**. Installation agent is an executable file. It is passed on to computers and starts automatically during task execution, receiving Client updates from server.

**Warning!**

If server account doesn't have administrator rights on all target computers, primary Device Monitor Client distribution will require credentials of an account having administrator rights at:

- all target computers
- computer where Management Console (DM) is running
- computer where Device Monitor server is running

If a password of used account is expiring (Windows warns that the password expires in 3 days and need to be
changed) then primary distribution task cannot run on behalf of this user.
If you are unable to enter administrator name and password, you can create your own InfoWatch Device
Monitor Client installation package (see "*Traffic Monitor. Installation guide*", arcticle "Creating Installation Package") and install it by other means (see "*Traffic Monitor. Installation guide*", arcticle "Standard InfoWatch Device Monitor Client Setup" and "Client Setup via Software Distribution Tools").

**Warning!**

If the workstation has Kaspersky Internet Security installed then you need to disable its self-protection to install the InfoWatch Device Monitor Client. See internet article "How to enable/disable self-defense in Kaspersky Internet Security" internet article.

**To create a primary InfoWatch Device Monitor client application distribution task**:

1. Go to **Tasks**.
2. Take one of the following steps:
   - in the Main Menu select **Edit > Add Task**;
   - click **Add Task** at the top of Navigation pane.

   These actions open **Deployment task wizard** dialog.
3. Enter task name, select **Initial deployment task** and type task description, then click **Next**.
4. Create a list of computers which you need to install Device Monitor Client to. To add computer (or several computers):
   a. Click **Add Select computer** dialog will display a list of computers from:
      - from directory;
      - Microsoft Windows Network;

- ones registered before (for example, after manual Client installation) and belonging to computer groups (**DM server computers** node).

b. Flag computers or computer groups. Minimized groups are marked with an icon ; expanded - . Doubleclick a group, to expand or collapse it.

> **Warning!**
>
> By marking a group you select the computers that are included in that particular group. Subgroups and subgroup computers of selected group are not selected: you have to select them separately.

You can also specify computer name or IP addresses:

- in the line at the bottom of dialog box. When listing addresses, separate them with semicolons;
- click **Import** and download text file where one entry should be placed in the each line; text should
  contain no blank lines.

c. After you specify the computers you want to add, click Select. The dialog will be closed and selected computers list will be displayed in **Task target computers list** area. To remove a computer from the list, select it and click **Remove**. When you make a full list of computers click **Next**.

5. Then InfoWatch Device Monitor servers currently registered in the System are displayed. You can change Client installation directory ( %Program Files%\Infowatch\DeviceMonitor\Client is used by default).

> **Important!**
>
> Path to the catalogue may contain the following characters: 0-9, a-z, A-Z, ":", ".", "_", "-", "\", " ". If the path includes other characters, the client installtion will be incorrect.

Click **Next**.

6. The unique name of Device Monitor proxy server certificate (Issuer Distinguished name, Proxy Root Issuer DN) will be displayed. You can change it with accordance to X.509 standard, CN (Common Name) field is mandatory, all fields comma-separated. Click **Next**.
7. Specify options of computer reboot:
   - **Wait for reboot without notifying the employee**. The Agent can:
     - start notifications immediately (*Do not wait* option),
     - start notifications in specified time (*Wait for option* - please specify time period to start notifications),
     - or do not notify at all (*Wait infinitely* option).
   - **Notify the employee about reboot necessity and wait for reboot**. Upon completing reboot waiting in "silent" mode (see **Wait for reboot without notifying the employee** setting) or immediately after installation ends, Device Monitor Client starts to notify employee on reboot necessity:

- during specified time period (*Notify within option*);
- permanently (*Notify infinitely* option);
- do not notify at all (*Do not notify* option).

If needed, change continuance and frequency of notifications appearance and enter text of the message displaying in reboot notification.

- **Show a warning before forced reboot**. If this check box is flagged, then the Client displays a notification about forced reboot and allows 5 minutes to end operations. Then the computer will be forced to reboot. If the option is not checked then the forced reboot (if it should be made according your settings) will be performed unexpectedly for the employee.

> **Warning!**
>
> Forced reboot is performed in case when neither **Wait while employee reboots computer** setting no S**how a warning before force reboot** setting do not flagged, or their wait durations are expired but employee did not reboot the computer.

Click **Next**.

8. Configure Client settings:
   - To protect Client application from deleting by employee, enter the password that will be requested when trying to uninstall the Client and confirm it.
   - **Show employee notifications** - if employee attempts to perform an action restricted by security policy (DM), a warning will be displayed. For further details, see "Employee Notifications about Policy (DM) Violations".
   - **Hide Agent presence** - indicates if Windows system tray of managed computer hides Client presence on the computer.

**Warning!**

Not notifying the user about interceptor operation may contradict the applicable laws of your country.

**Important!**

Hiding/notifying settings apply on the Client up to the first call to the server. On calling to the server, the Client will start using settings of the group the workstation belongs to.

**Warning!**

If there is an antivirus protection enabled on the managed computer then the antivirus program can reveal the operation of Device Monitor: for example, in the list of processes running on the managed computer or in the list of programs that initiate a control.

If this option is not selected, the Windows system tray of the computer where the Client is installed will display  icon. By clicking this icon, information on DM Client operation and list of currently controlled devices is displayed.

- **Install the component of network traffic interception** - installs **iw_proxy** component on a computer.
  Component will not be installed if you leave the checkbox empty.
- **Install the component of network connections control** - installs **Network Monitor** interceptor on a computer. Component will not be installed if you leave the checkbox empty.

**Warning!**

You should not install the component of network control to the server with Citrix Provisioning Services: this can lead to the serious problems concerning server operation.

- Task run parameters: they will be used in case the task wasn't launched at the first attempt. Specify the number of attempts and their intervals, in minutes.
- To launch a task immediately after saving, flag **Run task immediately** check box.
- Enter the credentials for the account that launches the task.This account must have administrator rights on all target computers.

**Warning!**

The System does not save passwords for accounts used to launch tasks. If the new task is not launched immediately, you will have to use password next time to launch it from Management Console (DM).
If a password of used account is expiring (Windows warns that the password expires in 3 days and need to be changed) then primary distribution task cannot run on behalf of this user.

Click **Next**.

9. Look through the task summary. If you need to change any settings click **Back** to return. If all settings are correct, click **Finish**.

## 6.6.4 Creating Update Task

InfoWatch Device Monitor client applications update is required after InfoWatch Device Monitor server upgrade: for
further details, see document "Traffic Monitor. Installation guide", article "Updating InfoWatch Device Monitor Server End".

**Note:**

Beside the following method, you can create update task with a simplified function as described in document "Traffic Monitor. Installation guide", article "Updating Clients at Managed Computers".

**To create and schedule InfoWatch Device Monitor client applications update task**:

1. Go to **Tasks**.
2. Take one of the following steps:
   - in the Main Menu select **Edit > Add Task**;
   - click **Add Task** at the top of Navigation pane.

   These actions open **Deployment task wizard** dialog.
3. Select **Update task**, enter task name and description and click **Next**.
4. Create a list of computers that require Device Monitor Client update. To add computer (or several computers):
   a. Click **Add**. The **Select computers** dialog, **DM server computers** node, contains the list of computers where Device Monitor Client version does not match Device Monitor Server version but can be automatically updated (client software version should be 4.0.651 and higher).
   b. Flag computers or computer groups. Minimized groups are marked with an icon ; expanded -. Double-click a group, to expand or collapse it.

> **Warning!**
>
> By marking a group you select the computers that are included in that particular group. Subgroups and subgroup computers of selected group are not selected: you have to select them separately.

c. Use **Filter by computer name** field to specify computer. Click **Find**.

d. After you specify the computers you want to add, click **OK**. **Select computers** dialog will be closed. Selected computers list will be displayed in **Task target computers list** area.
To remove a computer from the list, select it and click **Remove**.

When you make a full list of computer click **Next**.

5. Please specify reboot settings:
   - **Wait for reboot without notifying.** The Agent can**:**
     - Start to notify immediately (*Do not wait* parameter),
     - Start to notify after mentioned time period (Wait for hour(s) parameter - you need to specify time
     - before notification),
     - Do not notify before forced reboot (*Wait infinitely* parameter)..
   - **Notify the employee about reboot necessity and wait for reboot.** After "silent mode" wait to notify
     (see Wait for reboot without notifying setting), or right after update process completion, Device Monitor client will start to notify the employee about reboot necessity during specified time period (*Notify*
     *within hour(s) within: minutes* parameter) or infinitely (*Notify infinitely every x minutes*), or do not notify (
     Do not notify). When necessary, change length and frequency and specify text of the message, which
     will be displayed along with notification.
   - **Show a warning before reboot** - is a parameter to specify whether forced reboot notification will be
   - displayed (an employee can complete current tasks within 5 minutes before forced reboot) or forced
   - reboot will be performed without any additional text.
6. Specify:
   - Task retry parameters: they will be used in case the task wasn't launched at first attempt; if launching failed, the task won't be launched again. Specify the number of attempts and their intervals, in minutes.
   - To launch a task immediately after saving, flag **Run task immediately** check box.

Click **Next**.

7. Look through the task summary. If you need to change any settings click **Back** to return. If all settings are
correct, click **Finish**.

> **Warning!**
>
> If the workstation has the Kaspersky Internet Security installed then you need to disable its selfprotecting
> function for successful InfoWatch Device Monitor Client update.
> See details in internet article "How to enable/disable self-defense in Kaspersky Internet Security".

## 6.6.5 Creating Uninstallation Password Reset Task

**To create and schedule InfoWatch Device Monitor client applications update task**:

1. Go to **Tasks**.
2. Take one of the following steps:
   - in the Main Menu select **Edit > Add Task**;
   - click **Add Task** at the top of Navigation pane.

   These actions open **Deployment task wizard** dialog.
3. Select **Change uninstall password task**, enter task name and description and click **Next**.
4. Create a list of computers that need their uninstallation passwords to be changed on **Deployment target
computers** screen. To add computer (or several computers):
   a. Click **Add**. The **Select computers** dialog, **DM server computers** node, contains the list of computers where Device Monitor Client is installed.
   b. Flag computers or computer groups. Minimized groups are marked with an icon ; expanded -. Double-click a group, to expand or collapse it. Use **Filter by computer name** field to specify the computer.

      Click **Find**.

      > **Warning!**
      >
      > By marking a group you select the computers that are included in that particular group. Subgroups and subgroup computers of selected group are not selected: you have to select them separately.

   c. After you specify the computers you want to add, click **OK**. **Select computers** dialog will be closed.

Selected computers list will be displayed in **Task target computers list** area.
To remove a computer from the list, select it and click **Remove**.

When you make a full list of computer click **Next**.

5. Specify:
   - Task retry parameters: they will be used in case the task wasn't launched at first attempt; if launching failed, the task won't be launched again. Specify the number of attempts and their intervals, in minutes.
   - To launch a task immediately after saving, flag **Run task immediately** check box.

   Click **Next**.
6. Look through the task summary. If you need to change any settings click **Back** to return. If all settings are
correct, click **Finish**.

> **Warning!**
>
> If the workstation has the Kaspersky Internet Security installed then you need to disable its selfprotecting
> function for successful InfoWatch Device Monitor Client update.
> See details in internet article "How to enable/disable self-defense in Kaspersky Internet Security".

## 6.6.6 Creating Uninstallation Task

**To create a centralized task that removes InfoWatch Device Monitor client applications:**

1. Go to **Tasks**.
2. Do either of the following:
   - from the main menu, choose **Edit** > **Add task**;
   - use  **Add task** button which is located at the top of the **Tasks** section.

   The **Deployment task** wizard dialog box will appear.
3. At step 1, select **Uninstall task**, enter the task name and description, then click **Next**.
4. At step 2, create a list of workstations, from which you want to uninstall Device Monitor Client. To add workstations:
   a. Click **Add**. The **Select computers** dialog box will open. The **DM server computers** node contains the list of workstations, where Device Monitor Client is installed. You can also use the search field **Filter by computer name**. Enter the computer name and click **Find**.
   b. Flag required workstations or computer groups. Minimized groups are marked with

; expanded ones are marked with



. To expand or collapse a group, double-click its name.

> **Important!**
>
> When you select a group, only computers included in this group are selected. Subgroups of the selected group and computers included in the subgroup are not selected: you should select them separately.

c. After you specify the computers you want to add, click **Select**. Selected computers list will be displayed
in **Task target computers list** area.

To remove a workstation from the list, select its name and click **Remove**.
If all required workstation are present in the list, click **Next**.

5. At step 3, specify restart options for the task: they will be used if, for some reasons, the task was not started at the first attempt; if the task start failed with an error, the task will not be started again. Specify the number of attempts and the interval between attempts in minutes.
To launch the task immediately after saving, select **Run task immediately** check box.
Click **Next**.
6. View the task summary. If you need to change some settings, click **Back**. If all settings are specified correctly, click **Finish**.

> **Important!**
>
> If Kaspersky Internet Security is installed on a workstation, then, before uninstalling InfoWatch Device Monitor Client applications, you should disable self-defense in Kaspersky Internet Security.
>
> For more details, see "How to enable/disable self-defense in Kaspersky Internet Security".

## 6.6.7 Launching, Pausing, Editing, and Deleting Tasks

If you flagged L**aunch task immediately** when creating a task, it will start immediately. Otherwise, you will need
to manually launch the task. You might need this option, if for some reason you had to stop the task and want to
start it again.

For instructions see the following table.

To perform any of these procedures, you must first select a task from the list on **Tasks** panel.

| Action | Steps |
|---|---|

| Action | Steps |
|---|---|
| Start task | • in the Main Menu select **Edit > Perform** task;<br>• click **Perform task** located at the top of Navigation pane. |
| Stop task | • in the Main Menu select **Edit >Stop task**;<br>• click **Stop task** at the top of Navigation pane. |
| Edit list of computers in task | • at the top of **Task execution result** panel click **Add computer** or **Exclude computer from task**<br>• right-click computer row and select **Add computer** or **Exclude computer from task**.<br>**Warning!** You can't remove a computer if the task is running and not completed. |
| Edit task | • in the Main Menu select **Edit > Edit**;<br>• click **Edit** at the top of Navigation pane.<br>• right-click on task name and select **Edit**.<br>Specify new settings for the task like it is done for a new task (see "Creating Primary Distribution Task", "Creating Updating Task", "Creating Uninstallation Password Reset Task", "Creating Uninstallation Task") |
| Delete task | • in the Main Menu select **Edit > Delete**;<br>• click **Delete** at the top of Navigation Pane.<br>• right-click on task name and select **Delete**.<br>**Warning!** You can't remove a task with computer that has a running task. |
| View computer error log | • at the top of **Task execution result** panel click **Computer log**<br>• right click computer row and select **Computer log** |

## 6.6.8 Client Installation Errors

You may encounter installation problems during remote InfoWatch Device Monitor client applications installation
tasks to computers. This will be indicated by Task status value in the list of tasks: see "Viewing Tasks".

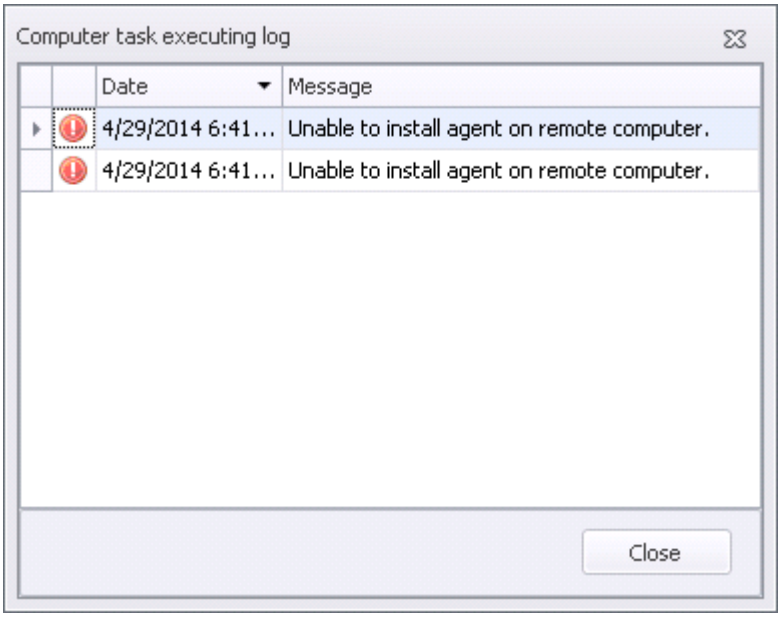
**To view task errors**:

1. Go to **Tasks**.
2. On **Tasks** panel select the task you want to review.
3. In **Status** column select filter value **Error** (for more information on filters see "Applying Standard Filters").

**Note:**

Status **No access** indicates that computer is not available (switched off or disconnected from
network)

4. In the row of the target computer do one of the following:
   - right-click the row and select **Computer Log;**
   - double-click the target computer row;
   - at the top of **Task execution result** panel click **Computer log**.




5. To view detailed error information, click the row. This opens a screen with Windows error description.

For detailed information on the error see its description, error code, or log in error's description. In particular, the
errors may be caused by the following things:

- computer is not available (switched off or disconnected from network);
- the installation process or reboot is blocked by another task or user (common description could be "*Other
  task is running*");
- target computer does not allow administrative resources;
- account in use doesn't have enough rights on target computer.

If all remote Client installation conditions in "Preparing Primary Client Installation. Distribution Agent" are met and the task is not blocked by the user, but the error persists, please contact InfoWatch technical support at support@infowatch.com and attach error description and log.

## 6.6.9 Creating Installation Package

Supplied InfoWatch Device Monitor Client installation package contains the following default settings:

- Client installation directory on computer system drive - `%Program Files%\Infowatch\DeviceMonitor\Client.`
- There is no uninstallation password.
- After installation Device Monitor Client starts to remind an employee that a reboot is required. Message text - "*Please reboot your computer as soon as possible*". Reminders are displayed infinitely, with 10 min intervals.

To change these settings create your own installation package. When you run it, it will use the settings specified
when installation package created: no other parameters are needed to specify.

**To create InfoWatch Device Monitor Client installation package**:

1. In the Main Menu select **Tools > Create install package**.
   This opens distribution task manager dialog box.
2. The InfoWatch Device Monitor servers currently registered in the System are displayed. Client will use them
   for primary installation.

   If necessary, change Client installation directory at computers.
   Specify local or network directory where to the installation packages will be saved.
   Click **Next**.
3. The unique name of Device Monitor proxy server certificate (Issuer Distinguished name, Proxy Root Issuer
   DN) will be displayed. You can change it with accordance to X.509 standard, CN (Common Name) field is
   mandatory, all fields comma-separated. Click **Next**.
4. Specify options of computer reboot:
   - **Wait for reboot without notifying the employee**. The Agent can:
     - start notifications immediately (*Do not wait option*),
     - start notifications in specified time (*Wait for option* - please specify time period to start notifications),
     - do not notify at all (*Wait infinitely option*).
   - **Notify the employee about reboot necessity and wait for reboot**. Upon completing reboot waiting in
     "silent" mode (see **Wait for reboot without notifying the employee** setting) or immediately after
     installation ends, Device Monitor Client starts to notify employee on reboot necessity:
     o during specified time period (*Notify within* option)
     o permanently (*Notify infinitely* option)
     o do not notify at all (*Do not notify* option).
     If needed, change continuance and frequency of notifications appearance and enter text of the message
     displaying in reboot notification.

- **Show a warning before forced reboot**. If this check box is flagged, then the Client displays a notification about forced reboot and allows 5 minutes to end operations. If the option is not checked then
the forced reboot (if it should be made according your settings) will be performed unexpectedly for the
employee.

> **Warning!**
>
> Forced reboot is performed in case when neither **Wait while employee reboots computer** setting
> no **Show a warning before force reboot** setting do not flagged, or their wait durations are expired
> but employee did not reboot the computer.

Click **Next**.

5. Define Client settings before it connects to the server for the first time:
   - To protect Client application from deleting by employee, enter the password that will be requested when
   trying to uninstall the Client and confirm it.
   - **Show employee notifications** - if employee attempts to perform an action restricted by security policy (DM),
   a warning will be displayed. For further details, see "Employee Notifications about Policy (DM) Violations"
   - **Hide Agent presence** - indicates if Windows system tray of managed computer hides Client presence
   presence on the computer.

> **Warning!**
>
> Not notifying the user about interceptor operation may contradict the applicable laws of your country.

> **Warning!**
>
> If there is an antivirus protection enabled on the managed computer then the antivirus program can
> reveal the operation of Device Monitor: for example, in the list of processes running on the managed
> computer or in the list of programs that initiate a control.

If this option is not selected, the Windows system tray of the computer where the Client is installed will
display icon. By clicking at this  icon, an information on DM Client operation and list of

currently
controlled devices is displayed.

- **Install the component of network interception** - installs **iw_proxy** component on a computer.
  Component will not be installed if you leave the checkbox empty.
- **Install the component of network control** - installs **Network Monitor** interceptor on a computer.
  Component will not be installed if you leave the checkbox empty.

> **Warning!**
>
> You should not install the component of network control to the server with Citrix Provisioning
> Services: this can lead to the serious problems concerning server operation.

Click **Next**.

6. Look through the task summary. If you need to change any settings click **Back** to return. If all settings are
   correct, click **Finish**.

Client installation package will be saved in the folder you specified at the first step.

# 6.7 Additional Features

You can use the following functions to enhance your Management Console (DM) experience: filtering, grouping and
sorting table entries.
Certain functions can be also accessed with hotkeys.

## 6.7.1 Filter Table Contents

You can filter table contents against one parameter or more with various filters. A filter makes a table display only
the entries that comply with filtering conditions.
More information on filters is available in the following subsections:

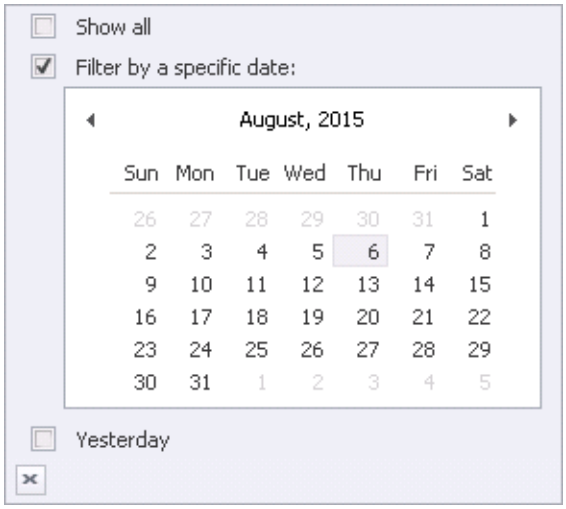
- Filter by Date;
- Applying Standard Filters;
- Custom Filter;
- Editing Filters;
- Removing a Filter.

### 6.7.1.1 Filtering by Date

If the table shows temporary parameter characteristics (for example, Client installation date and time, Console (DM) log
time, last computer access, registered event date, etc.), you can filter the column against the desired date or
period.

**To view the records for specific date or period**:

1. Move the pointer over the time/date attribute in the column header.
2. Click the button to the right of the column header.




3. Select one of the following filters:
   - **Show all** - select this check box to view all records regardless the date.
   - **Filter by a specific date** - select the date in the calendar.
     To select a period, select it holding the mouse button.
     To go from date to month or year display, click the month/year.
     Use arrows to go forward or backward.
   - **Today; Yesterday; Last week; Earlier this week; Earlier this year** fields depend on column values: for
     example, if there are no records for the date, **Today** field won't be displayed. Check this box to display
     only the records inside specific date range.
4. Click to apply the filter and close the form.

### 6.7.1.2 Applying Standard Filters

**To filter table entries against a single attribute**:

1. Move the pointer over the time/date attribute in the column header.
2. To view filter list, click to the right of the column.
3. Select one of the following filters from the list:
   - **Blanks**. Display records with `<Is Null>` value (the field is empty).

- **Non blanks**. Display records with `<Is Not Null>` value (i.e., the field contains attribute value).
- `<attribute value>`. Display records that contain selected attribute.

> **Note:**
>
> **Custom** option lets you configure your filtering criteria (for more info see "Custom Filter").

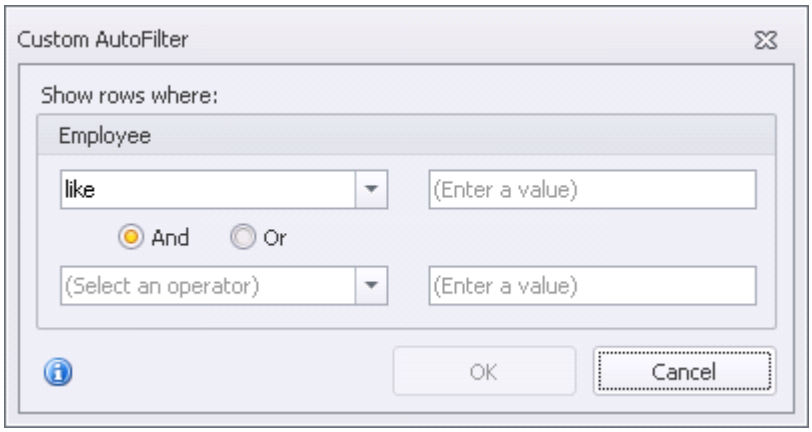
The table will only display filtered values.

**To filter values against several attributes**,
repeat simple filtering procedure against all filter attributes you want to apply.
Complex filter reduces the table contents to records filtered against several attributes.

### 6.7.1.3 Custom Filter

**To specify your own filtering criteria for table entries**:

1. Move the pointer over the column header that contains required attribute.
2. Expand filter list by clicking to the right of the column header.
3. In the drop-down list, select **Custom**. This opens **Custom AutoFilter** dialog.




4. In this box, specify filtering criteria:
   - Select conditions from the drop-down list in the upper-left box.

> **Note:**
>
> You can use comparison operators to limit filtering criteria: *equal, not equal, greater than, greater than or equal to, less than, less than or equal to; values empty (blank) and nonempty (non-blank field)*; or
> text filter with a mask. To get a text filter syntax tip, click .

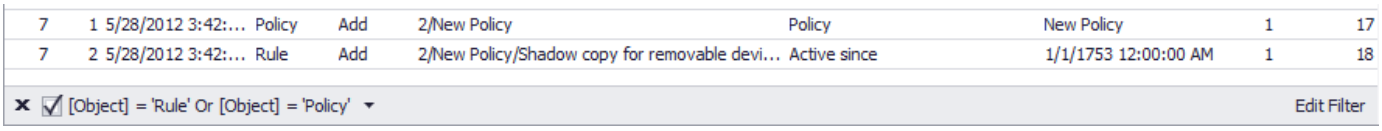
   - Enter condition value into the top right box.

- Specify additional criteria, if needed, by selecting a logical operator for and entering the second condition
  at the bottom.

> **Note:**
>
> Choose logical operator **AND**, if you want the items that match both conditions at the same time.
> Select logical operator **OR** filters the items that match at least one condition.

5. Click **OK** to apply the filter.

Filtered table only displays the items that match filtering criteria. Filtering criteria string is at the bottom of the screen that contains filtered items.

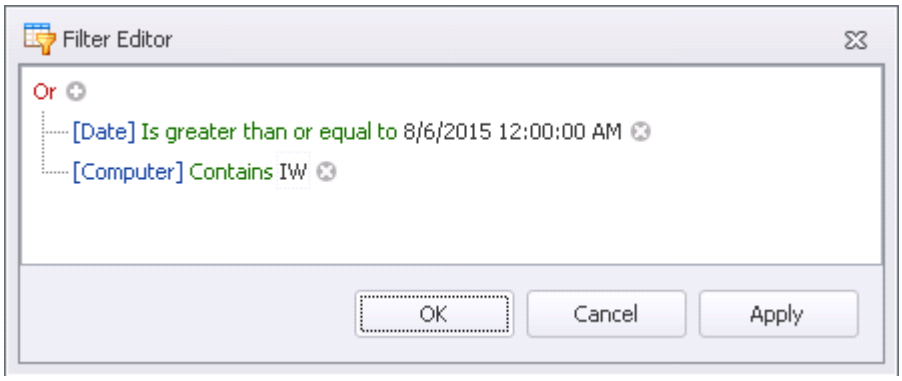



To remove filter and view all items, clear the check box in filter string. To apply the filter again, select the check box.
To re-use a filter, click the filter string and select filter from drop-down filter history list. Custom filters are stored until you close the window with filtered content.

## 6.7.1.4 Editing Filters

**To edit active filter**:

1. Click **Edit Filter** at the end of the filtering conditions string. The following dialog box displays **Filter Editor**.




2. Edit filtering criteria. Available actions:

| Action | Steps |
|---|---|
| Edit an attribute, attribute value or operator | 1. Click attribute/value name of attribute/operator<br>2. Select the value from the drop-down list or enter the value to the field |

| Action | Steps |
|---|---|
| Add a simple condition | Click the button ⊕ to the right of the logical operator<br>or<br>Click **Add Condition** in logical operator menu |
| Delete condition | Click the button ⊕ at the end of condition string |
| Add criteria group | 1. Click the logical operator name<br>2. Select **Add Group** in the menu |
| Delete criteria group | 1. Click the name of operator criteria group<br>2. Select **Delete Group** in the menu |
| Delete all criteria | Click **Clear All** in logical operator menu |

3. Click **Apply** and view the filtered results without closing **Filter Editor** screen.
4. Click **OK**.

### 6.7.1.5 Removing a Filter

**To remove a filter**,
take one of the following steps:

- Click filtered column header and select **All** from the drop-down filter list.
  If you are using complex filter, repeat the step for every condition you want to remove.
- Remove the flag in filter conditions string.
- Click ✖ in filter conditions string. This closes filter conditions string.

## 6.7.2 Grouping or Sorting Entries

Grouping function is intended for managing table entries according to selected schema. Group scheme is displayed on the group panel over the column title row. Contents are grouped basing on a single attribute or more (table columns).

**To group the contents basing on an attribute**:

1. In table's title row, click the column title that corresponds to the attribute name.
2. Click and hold the title to drag it over the group panel. Name of the grouping attribute appears on the group panel.

To group the contents basing on multiple attributes, repeat steps 1-2 for all attributes participating in the process.

**Note:**

You can change the grouping procedure by changing the order of column titles in group scheme. The column with the title is at the top right of the group scheme is processed first.

Grouped entries appear collapsed. To view information for a specific entry, click on the left of the record you want to expand. To minimize entry, click to the entry's left. You can ungroup entries basing on one or more attributes, removing columns from the group scheme.

**To ungroup entries basing on any attribute**:

1. In group panel, click and hold the column title you want to remove from the group scheme and drag it into
   table title row. Column location is indicated with a rectangular frame.
2. Move column title over the title row to the desired position and release the button. This will move the column
   to specified location.

Use sorting feature to display table contents in ascending or descending order of any attribute.

**To change attribute values sorting order of the in a column**,
move the pointer over the column title you want to use for sorting. Click the selected title. This will sort all table
contents in ascending/descending order of the attribute values.
**To go back to the old sorting order**,
click the selected header once again.

## 6.7.3 Hotkeys

The following table lists the keys and key combinations, used for quick access to various system functions.

| Feature name | Hotkeys |
|---|---|
| Server connection | |
| Connect to server | F4 |
| Exit Console | Alt+F4 |
| Main screen customization | |
| Hide/show Navigation bar | Ctrl+Shift+1 |
| Hide/show Details | Ctrl+Shift+2 |
| Hide/show Console log | Ctrl+Shift+3 |
| Management Console sections | |
| Go to Policies | Ctrl+2 |
| Go to Employees | Ctrl+3 |
| Go to Computers | Ctrl+4 |
| Go to White Lists | Ctrl+5 |
| Go to Signatures | Ctrl+6 |
| Go to Log | Ctrl+7 |

| Feature name | Hotkeys |
|---|---|
| Go to Tasks | Ctrl+8 |
| Go to Events | Ctrl+9 |
| Manage security schema (overview) | |
| Go to security schema editing mode | F11 |
| Save security schema | F12 |
| Cancel saving security schema | Shift+F11 |
| Unblock security schema (Superuser only) | Ctrl+Shift+U |
| Update security schema | F5 |
| Go to the latest security schema version (when viewing an earlier version) | F9 |
| Manage security policies | |
| Add security policy | Ctrl+N |
| Edit security policy | Ctrl+E |
| Delete security policy | Ctrl+D |
| Manage rules | |
| Add rule | Ctrl+Shift+N |
| Edit rule | Ctrl+Shift+E |
| Delete rule | Delete |
| Manage employee groups | |
| Add new employee group | Ctrl+N |
| Edit employee group | Ctrl+E |
| Delete employee group | Ctrl+D |
| Manage employee accounts | |
| Add employee account to a group | Ctrl+Shift+N |
| Edit employee account | Ctrl+Shift+E |
| Remove employee account from a group | Delete |
| Delete employee account from security schema | Shift+Delete |
| Manage computer groups | |

| Feature name | Hotkeys |
|---|---|
| Add new computer group | Ctrl+N |
| Edit computer group | Ctrl+E |
| Delete computer group | Ctrl+D |
| Manage computers | |
| Add computer | Ctrl+Shift+I |
| Remove computer from a group | Delete |
| Delete computer from security schema | Shift+Delete |
| Manage white lists | |
| Add white list | Ctrl+N |
| Edit white list | Ctrl+E |
| Delete white list | Ctrl+D |
| Edit white list entries | Ctrl+Shift+E |
| Manage signatures | |
| Add signature category | Ctrl+N |
| Edit signature category | Ctrl+E |
| Delete signature category | Ctrl+D |
| Remove signature from category | Delete |
| Configure filters for Audit Log and Event Viewer | |
| Add filter | Ctrl+N |
| Edit filter | Ctrl+E |
| Delete filter | Ctrl+D |
| Manage Client remote installation and upgrade tasks | |
| Add task | Ctrl+N |
| Edit task | Ctrl+E |
| Delete task | Ctrl+D |
| Add computer to selected task | Ctrl+Shift+N |
| Remove computer from selected task | Delete |

| Feature name | Hotkeys |
|---|---|
| Display target computer error log | Ctrl+L |

# 7 LICENSING INFORMATION

The licensing information for the System is contained in the following topics:

- End-User License Agreement
- Third-Party Licenses

## 7.1 End-User License Agreement

**IMPORTANT! Read this End-User License Agreement (EULA) carefully before using the Software.**

**Clicking the Accept button in the License Agreement box at installation time or any use of the installed Software will signify your irrevocable acceptance of the terms and conditions of this EULA. If you do not accept the terms and conditions of this EULA, You should terminate the installation process and/or the use of the Software.**

### 7.1.1 License Agreement

This End-User Licence Agreement (“Agreement”) is a joinder agreement between InfoWatch (“Rightholder”) and you, a person or legal entity (“User”), legally possessing a copy of InfoWatch Traffic Monitor (“System”).
The System is designed for monitoring, filtering, and the prevention of leaks of data transferred beyond the company frontiers through Right holder, Internet or Internet pagers as well as for network and local printing. The System also allows you to control access to ports and monitor data copied to removable storage devices.

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#### 7.1.1.9 9. Rightholder Contact Information

"InfoWatch"
Phone/fax:+7 (495) 229-00-22
Sales department:sales@infowatch.com
Technical support service:support@infowatch.com
Website:http://infowatch.com/

## 7.2 Third-Party Licenses

The system contains third-party components distributed under the MIT License (http://www.opensource.org/licenses/mit-license.html):

- Lua - http://www.lua.org/license.html
- LuaBind – http://www.rasterbar.com/products/luabind.html
- libxml2 – http://www.xmlsoft.org/

The system also contains software:

- distributed under the terms of the BSD Licenses (http://www.opensource.org/licenses/bsd-license.php):
    - Stringencoders – http://code.google.com/p/stringencoders/
- distributed under the GNU GENERAL PUBLIC LICENSE (http://www.gnu.org/licenses/gpl-2.0.html):
    - - Pdftotext – http://www.foolabs.com/xpdf/
    - - Tnef – http://sourceforge.net/projects/tnef/
    - - Unzip – http://www.info-zip.org/UnZip.html
    - - libcole.so – arturo@directmail.org; andy.scriven@research.natpower.co.uk
    - - libhtmltree.so – pauljlucas@mac.com

# 8 GLOSSARY

| Term | Glossary |
|---|---|
| Active Directory | LDAP-compatible Microsoft directory services for the Windows NT operating systems family |
| Active policy | A policy included into a configuration that is uploaded to a host. See also: Policy, Host |
| Administrator | A preset role and user account in Management Console. An Administrator can modify other accounts and their rights. It is also a System user who installs, configures and maintains the System. See also: User role, Security officer, User |
| AJAX | Asynchronous JavaScript and XML is a group of interrelated Web development techniques used on the client-side to create asynchronous Web applications |
| Attachment | File attached to the intercepted event at any nesting level. See also: Event |
| Audit | Controlling of acrions fulfilled by Management Console users: creating and managing the security schema, System administrating. See also: Audit log, Management Console accounts |
| Blanks | Technology of searching the filled blanks of forms: questionnaires, receipts, etc. Blanks are stored in the System as digital prints, their text is not available for viewing to either users or System administrators. See also: Technologies, Technology element |
| Case sentive | Term setting: if the term is case-sensitive, the text search will detect only word forms which completely match upper- and lower-case letters defined in a term. See also: Term |
| Catalogs of persons, workstations and groups | Information about users, workstations, groups of users, and groups of workstations imported from Active Directory and created using Management Console. Used to simplify work with the events information. |
| Categories and terms | Technology of searching the words and phrases in the event text. The event where the term is found is referred to the caregory which this term belongs to. Old synonyms: Classifier, CFB. See also: Event, Term, Category, Technologies, Protected object |
| Category | Named term group characterizing some theme. If the System detects any term from the category in the text of the intercepted event, it associates the event with this category. See also: Term |
| Citation index | A measure of how close the sample document matches the text of the document being analyzed. See also: Sample document, Quote |
| Computer | A managed computer: workstation or mobile device or terminal device. See also: Workstation, Mobile device, Terminal device |
| Configuration | A group of settings required to check events for data monitoring and analyzing. See also: Event, Tchnologies, Lists, Policy |
| Configuration version | A fixed state of the configuration designed to monitor changed settings of the event analysis. The configuration version is committed after uploading to a host. The configuration version can be active (currently used), editable (the last version with up-to-date modification) and saved (having changes and editable for users). See also: Configuration |

| Term | Glossary |
|---|---|
| Controlled persons | Set of persons, groups of persons and person's statuses which detection in the event results in assotiating this event to the person control policy which defines this set. See also: Persons, Persons group, Persons status, Person control policy |
| Copy mode | One of IW TM transport modes. In this mode the actual traffic does not pass through the System. The copy of traffic is analyzed. In this mode the traffic cannot be filtered by the System. See also: Transport mode |
| Copy rule | The rule that regulates copying, printing and photographing protected data. See also: Rule, Protected data, Data protection policy |
| Corporate security policy | A set of technical, organizational, administrative, legal, and physical measures, methods, rules, and guidelines that cover all security aspects in a company |
| Dashboard | Management console section that displays on widgets the statistical information on the violations and violators. See also: Management Console, Widget, Violation |
| Data interception | A process of acquiring, parsing, categorizing, and converting data (or a copy) into context. It is possible to intercept data transferred using the following protocols: SMTP, HTTP, ICQ/OSCAR, Skype, IXP, XMPP, MMP, FTP. See also: Interceptor, Event context |
| Data interception channel | A data interception environment that includes technical appliances, software tools, and communication protocols. The System supports the following data interception channels: email (SMTP, IMAP, and POP3), Web (HTTP), instant messaging services (ICQ and Skype), shadow copies of files, connected/disconnected workstation events, and print jobs. |
| Database | A collection of data stored in accordance with a data scheme. Contains all information needed for the System. |
| Database unloadings | Technology of searching the quotes the database. Database unloadings may be lists of salaries, other personal data, etc. See also: Technologies |
| Decision | The security officer’s conclusion on whether the event violates the corporate security policy or not. Possible values: “No decision“ , “Violation:“ and “No violation“. See also: Security officer, Corporate security policy, Event, Event attributes, Violation, Policy, Verdict |
| Delivery status | Event attribute that specifies the possibility of event delivery to recipients after the analysis. If the event delivery has been allowed, then the attribute value represents the delivery tracking (completed or failed). See also: Event attributes |
| DeviceLock | Data loss prevention (DLP) system providing endpoint device/port control and data leak prevention |
| DeviceLock Adapter | IW DM interceptor that integrates with DeviceLock; it intercepts the shadow copies of the files copied to the removable devices. See also: IW DM, Shadow copy of a file, Interceptor |
| Digital print | A method of storing a sample document in the database in the form of a set of quotes. See also: Sample document, Quote |
| Document shadow copy | A copy of printed document, received from the print job initiated on the managed computer. See also: InfoWatch Device Monitor |
| Domino Directory | IBM Lotus Domino Directory is a directory of information about users, servers, and groups. The Domino Directory is also a tool that administrators use to manage the Domino system. |

| Term | Glossary |
|---|---|
| Event | Objects of traffic interception (SMTP and IMAP and POP3 mail, HTTP requests, ICQ and Skype messages), shadow copies of files and print jobs. Generated by the System as a result of the data exchange between employees and others, including publication in media, copy to external devices and printing. |
| Event analysis | The procedure of processing of the attributes, attached files, and text of the intercepted events and of assigning additional attributes to the event. See also: Event, Policy, Event attributes |
| Event attributes | Structured data extracted from the events and assigned according to the processing results. See also: Event, Policy, Verdict, Decision, Transport mode |
| Event context | Internal representation of an intercepted event in the System. XML data (attributes, text) extracted from the event and its attachments. After processing the analysis results and the decision are added to the context. See also: Event, Technologies, Decision |
| Event text | Text information extracted from the event body and its attachments. Contains no formatting or markup. Is used for analysis and search. See also: Event, Event body |
| File shadow copy | A copy of file recorded to a removable device.The copy is created only if the file is successfully saved on the removable storage device. See also: InfoWatch Device Monitor |
| File signature | A constant integer value that uniquely identifies a file of a certain type. |
| FTP | File Transfer Protocol is a network protocol used to transfer computer files from one host to another host over a TCP-based network, such as the Internet. |
| Graphical object | Technology of searching the images (passports, bank cards, etc) in the text and attachments of the intercepted events. See also: Technologies, Event, Protected object |
| Group of persons and computers | Group aggregating data on organization's users and computers and on external contacts. The groups can be AD Groups (imported from Active Directory) or TM Groups (created using IW TM). See also: Person, Computer, Contact |
| GTalk | Google Talk is an instant messaging service that provides both text and voice communication. |
| Headers | Supplemental data placed at the beginning of a block of data being stored or transmitted. Used for creating the event entity in the System and for determining the attribute values of this event. See also: Event, Event attributes |
| HTTP | HyperText Transfer Protocol, an application-tier protocol used to transfer the data in the text format. See also: HTTPS, HTTP(S) Monitor |
| HTTP query | A request formed according to the HTTP standards (POST request, GET request etc.) See also: HTTP, Event |
| HTTPS | Hypertext Transfer Protocol Secure is a network protocol for secure communication over a computer network. See also: HTTP, HTTP(S) Monitor |
| ICAP | Internet Content Adaptation Protocol is a lightweight HTTP-like protocol that allows to control the incoming and outgoing HTTP traffic. It also makes it possible to modify the content of the HTTP requests. |
| ICQ | An Internet instant messaging service. Uses OSCAR protocol. |

| Term | Glossary |
|---|---|
| ICQ message | A message sent through the ICQ-OSCAR protocol. See also: Event |
| IMAP | Internet Message Access Protocol is a protocol for e-mail retrieval and storage |
| InfoWatch Device Monitor | IW DM is software appliance designed to control the user access to peripherals and to monitor operations (data either copied to removable media and network storages or sent to print, network activity, applications usage, photo) and intercepting messengers traffic (Skype, Gtalk, Mail.ru Agent and Jabber) and so on. |
| InfoWatchTraffic Monitor | IW TM software suite is designed to control various types of traffic (SMTP, IMAP, POP3, HTTP, HTTPS, IMAP, XMPP, YMSG, ICQ, NRPC) and shadow copies of the data copied to the removable media and sent to printing. |
| Initiators | A person whose actions led to the events creation |
| Inline mode | IW TM system deployment mode which may block mail outgoing from the perimeter, followed by dispatching. IW TM Server is used as a relay server. |
| IW Lync Adapter | Interceptor of data communication events through MS Lync servers installed in the company infrastructure. |
| Jabber | Messaging and information exchange system based on the open XMPP protocol. |
| License | Right to the System usage. Gained when bying the System and defines available users number, used technolodies and interceptors and so on. See also: Technologies, Interceptors |
| Lists | Lists the similar data generated by Management Console to be used in policies creating. See also: Configuration, Policy |
| Lotus Adapter | Interceptor installed on the IBM Lotus server to redirect mails to IW TM for analysis. See also: Interceptor |
| Lotus Domino | IBM mail server which messages are intercepted by Lotus Adapter. |
| Mail.Ru Agent | An instant messaging service supporting IP telephony, video calls and SMS sending |
| Management Console | A graphical user interface. Designed to manage InfoWatch Traffic Monitor (administration, configuring settings, event analysis, etc.). |
| Management Console (DM) | GUI element. It is designed to control InfoWatch Device Monitor (system administration, security schema configuration, etc.) |
| Management Console user | User who manages the System. Each user has a role assigned basing on corporate security policy. |
| MAPI | Messaging Application Programming Interface is a messaging architecture and a Component object model based API for Microsoft Windows |
| Mask | A search pattern of characters and wildcards used to match folder and file names. |
| MMP | The protocol of connection between Mail.Ru Agent and general Mail.Ru network |
| Mobile device | Computer type: smartphone or tablet PC with OS of Android or Windows Phone or iOS family. See also: Computer |

| Term | Glossary |
|---|---|
| Monitor | See: Interceptor |
| Morphology | Term setting: if morphology is used, the text search will detect all word forms of this term. See also: Term |
| MS Lync | Microsoft instant messaging clients for corporate environments. |
| Normal transport mode | A traffic analysis and filtering mode. In this mode, it's possible to block the traffic forbidden by the System can be blocked. See also: Transport mode, Inline mode |
| Notification | E-mail sent in case if the policy triggers on the event. Is sent via Management Console to notify Management Console users, employees or third parties. Contains a summary on the intercepted events and attached message. See also: Policy, Event |
| Occurrence threshold | A number of text objects found in the event enough to detect the protected object where this occurrence threshold is defined. See also: Event, Text objects, Protection object |
| Perimeter | A container of company infrastructure elements and contact information. The perimeter is used to logically divide a company into structural elements and track the traffic of every element. See also: Group of persons and computers |
| Person | Account of employee or external contact that is contained in System catalog and allows to process the data belonging to this account as a whole and to user-friendly display data referring to it. See also: Group of persons and computers |
| Persons control policy | A policy to add rules controlling persons, persons groups and person statuses. See also: Policy, Persons control rule, Person, Person status |
| Persons control rule | Rule that assigns attributes to the event of specified violation level and which senders or recepients contain persons specified in the policy which includes this rule. Allows to re-assign person's status and to send notifications. See also: Rule, Event attributes, Person, Violation level, Person status, Notification, Persons control policy |
| Placement rule | The rule that regulates storing protected data. See also: Rule, Protected data, Data protection policy, Crawler |
| Policy | A set of rules according to which the event analysis and processing facilities are performed. See also: Policy, Active policy, Rule |
| Policy (DM) | A set of file monitoring rules for removable devices, network activity, printing, configuring peripherals access level etc. You can only assign security policy to a group (of employee or workstations.) See also: Rule (DM) |
| POP3 | Post Office Protocol Version 3 is an application-layer network protocol used by local e-mail clients to retrieve e-mail from a remote server over a TCP/IP connection |
| POST query | A query method designed to request that a web server accept the data enclosed in the request message body for storage. Often used for file downloading of filled web-form representing |
| Privilege | Entity defining user's ability to perform some action (set of actions) when managing the System |

| Term | Glossary |
|---|---|
| Protected data | A set of protected objects, their catalogues and file formats which detection in the event allows to characterize this event as falled under the data protection policy where this set is defined. See also: Protected object, File format, Data protection policy |
| Protected object | The set of technology elements whose presence in the event allows the System to determine that this event belongs to a particular type of business documents (catalogue of protected objects). Protected objects are used in defining of data protection policies. See also: Technology element, Data protection policy |
| Proxy Server | The service that allows indirect requests to other network services. Proxy forwards all requests of the client programs to the network, and, having received the reply, sends it back to the client. |
| Quotation threshold | A procent of the sample document found in the even as quotes, enough to associate the event with this sample document. See also: Event, Sample document, Quote |
| Quote | A quote from the sample document found in the event text. See also: Sample document |
| Reference hash sum | Unlike the current hash sum, keeps the representative state of System files. See also: Integrity control |
| Relay server | A server which allows anyone on the Internet to send e-mail through it, not just mail destined to or originating from known users. |
| Report | Selection providing a visual display of event statistic data. See also: Management Console, Event |
| Rule | Entity defining System's actions in the response to any actions which persons do with secured data.A rule is a set of conditions to test the event with and actions performed when those conditions are fulfilled or not. See also: Event, Policy, Protected object, Persons control rule, Copy rule, Transfer rule, Placement rule |
| Rule (DM) | Set of restrictions and conditions that monitor file operations on removable devices, network activity, printing, configure access to managed peripherals etc. Each interceptor features a separate rule type. A rule can be only applied within its policy. See also: Policy (DM) |
| Sample documents | Technology of searching the quotes from sensitive documents: memos, financial reports, contracts, and others. Sample documents are stored in the System as digital prints, their text is not available for viewing to either users or System administrators. See also: Technologies, Technology element, Digital print, Quote |
| Scan task | Operation (single or repeated) of checking target storage locations (Microsoft SharePoint storage, local drives of workstations, shared network resources) if they store technology elements. See also: Crawler, Scanner, Tecnology element |
| Scanner | Crawler service whicn checks files in the corporate nerwork if they violate the corporate security policy. See also: Crawler, Corporate security policy |
| Security officer | A basic user of the Management console. Also - pre-installed role of the Management Console user that has privileges for all the actions in the system except administrative. See also: Management Console, User, User role, Privilege, Administrator |
| Skype | A voice-over-IP service and instant messaging client |

| Term | Glossary |
|---|---|
| SMB | Server Message Block operates as an application-layer network protocol mainly used for providing shared access to files, printers, serial ports, and miscellaneous communications between nodes on a network. |
| SMTP | Simple Mail Transfer Protocol is a networking protocol used to send the email in TCP/IP networks. |
| SMTP mail | An e-mail formed according to SMTP standards. See also: SMTP, Event |
| SPAN | Switched Port Analyzer is a technology that allows to mirror the network traffic from one port to another |
| SPAN copy | A variety of the “Copy” transport mode. In this case the traffic passes through a CISCO switch. The copy of the traffic is sent to Traffic Monitor Server for analysis. See also: SPAN |
| SSL | Secure Sockets Layer is a cryptographic network protocol developed for transmitting private documents via the Internet. |
| Status | Characteristics of persons and computers allowing to divide them onto groups for convienent analysus and activity control and to display them on dasboards and reports with special color indicating. See also: Persons, Computers, Dasboard, Report |
| Stop word | Numbers, letters and words, whose presence in cells do not trigger these cells. Stop words are used to eliminate false triggering. |
| Tag | The text label giving a brief description of the event. See also: Event attributes |
| Task | See Scan task |
| Technologies | Set of analysis tools searching for defined elements in the events' context and adding characterizing attributes to the event. See also: Technology element, Event context, Categories, Terms, Sample documents, Blanks, Database unloadings, Text objects, Graphical objects |
| Technology element | A part of the System technologies settings. Samples of confidential data. Can be categories and terms, sample documents, blanks, database unloadings, text and graphical objects. See also: Technologies, Categories and terms, Sample documents, Blanks, Database unloadings, Text objects, Graphical objects, Protected object. |
| Term | One of the set of words and phrases together defining a topical area. See also: Category |
| Term Weight | How the term is characterized for the given category; an integer between 1 and 10. If a term with a higher weight is detected in event, then this event will be more likely associated with the category of this term. See also: Term |
| Text object pattern | Unified description of all possible text objects with the typical structure: passport numbers, credit card numbers, phone numbers, medical codes etc. See also: Text objects |
| Text objects | Technology of matching the data from the events' text with defined patterns (rules of generating bank cards numbers) . See also: Tecnologies, Event, Technology element, Text object pattern |
| Transfer rule | The rule that regulates sending and receiving protected data. See also: Rule, Protected data, Data protection policy |

| Term | Glossary |
|---|---|
| Transport mode | Event attribute that defines the level of control when the object is delivered to the recipients. Assigned by the analysis and decision engine during the object analysis. Together with the "Verdict" attribute determines if the object can be delivered further on. See also: Event attributes, Verdict, Copy mode, Normal transport mode, Delivery status |
| User | IW TM users: administrator, security officer etc. See also: Administrator, Security officer, Person |
| User interface | The complex of tools and methods by means of whose the user interacts with the system. |
| User role | A set of privileges that define a set of actions available for the user. See also: Administrator, Security officer, Management Console, Privilege |
| Verdict | An event attribute with the conclusion about the presence (or absence) of violations in an event. Together with the Transport Mode attribute determines if the event can be delivered further on. See also: Event, Transport mode, Delivery status, Event attributes |
| Verdict reason | Event attribute that describes the reason why a certain verdict was assigned to the event. See also: Event attribute, Verdict |
| Violation | The value of the «Decision» attribute; means that the corporate security policy has been violated. See also: Decision, Corporate security policy |
| Violation level | Event attribute indicating (by the color tag) the level of threat to corporate security policy. See also: Event, Event attributes, Violation |
| Visibility scope | The way to divide intercepted events to restrict Management console user access to them. Events satisfying criterias of some visibility scope will be visible to those users who have an access to this scope only (given that user has privileges to view or/and manage events). See also: Event, Privilege |
| WhatsApp | Messenger for smartphones that allows you to send text messages, images, audio and video files; as well as the protocol used in it. |
| Widget | Interface element in the form of an isolated area that displays the specified statistic information on violations and violators. See also: Management console, Violation, Violator |
| Workstation | Computer type: desktop or notebook with OS of Windows or Linux or Mac family. See also: Computer |
| XMPP | Extensible Messaging and Presence Protocol is a communications protocol for message-oriented middle-ware based on XML. |
| Yahoo | System for fast messages and information exchange based on open YMSG protocol. |