FortiGuard Analysis and Management Service Version 1.2.0

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FortiGuard Analysis and Management Service Administration Guide
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Contents

Introduction

The FortiGuard Analysis and Management Service is a subscription-based service that provides remote management and logging and reporting capabilities for all FortiGate units. The FortiGuard Analysis and Management Service is available for FortiGate units running FortiOS 3.0 MR6 or higher.

The subscription-based service is available from the FortiGuard Analysis and Management Service portal web site, which provides a central location for configuring logging, reporting and remote management. From the FortiGuard Analysis and Management Service portal web site you can also view subscription contract information, such as daily quota and the expiry date of the service.

This document refers to the FortiGuard Analysis and Management Service as “the service”, a FortiGate unit as “device”, and the FortiGuard Analysis and Management Service portal web site as the “portal web site”.

This section introduces you to FortiGuard Analysis and Management Service and the following topics:

About this document

This document explains how to configure and use the service. This document contains the following sections:

- Setup – Describes how to create a service account, add a device and its contract to the service account, and configure devices to use the service.
- Dashboard – Describes how to add widgets and pages, and customize the Dashboard and pages.
- Management – Describes how to view service account information, add users and devices, and create and run scripts.
- Analysis – Describes how to view and browse logs, including viewing reports.

Document conventions

The following document conventions are used in this guide:

- In the examples, private IP addresses are used for both private and public IP addresses.
- Notes and Cautions are used to provide important information:

Note: Highlights useful additional information.

Caution: Warns you about commands or procedures that could have unexpected or undesirable results including loss of data or damage to equipment.

Typographic conventions

Fortinet documentation uses the following typographical conventions:

Convention	Example
Keyboard input	In the Gateway Name field, type a name for the remote VPN peer or client (for example, `Central_Office_1`).

Code examples	`config sys global`
	`  set ips-open enable`
	`end`

CLI command syntax	`config firewall policy`
	`  edit id_integer`
	`  set http_retry_count <retry_integer>`
	`  set natip <address_ipv4mask>`
	`end`

Document names	*FortiGate Administration Guide*
File content	`<HTML><HEAD><TITLE>Firewall Authentication</TITLE></HEAD> <BODY><H4>You must authenticate to use this service.</H4>`
Menu commands	Go to **VPN > IPSEC > Phase 1** and select Create New.
Program output	`Welcome!`
Variables	`<address_ipv4>`

Fortinet documentation

The most up-to-date publications and previous releases of Fortinet product documentation are available from the Fortinet Technical Documentation web site.

Fortinet Tools and Documentation CD

All Fortinet documentation is available from the Fortinet Tools and Documentation CD shipped with your Fortinet product. The documents on this CD are current at shipping time. For up-to-date versions of Fortinet documentation visit the Fortinet Technical Documentation web site.

Fortinet Knowledge Center

Additional Fortinet technical documentation is available from the Fortinet Knowledge Center. The knowledge center contains troubleshooting and how-to articles, FAQs, technical notes, a glossary and more. Visit the Fortinet Knowledge Center.

Comments on Fortinet technical documentation

Please send information about any errors or omissions in this document, or any Fortinet technical documentation, to techdoc@fortinet.com.

Customer service and technical support

Fortinet Technical Support provides services designed to make sure that your Fortinet systems install quickly, configure easily, and operate reliably in your network.

Please visit the Fortinet Technical Support web site to learn about the technical support services that Fortinet provides.

Setup

This section explains how to:

- log in to the portal web site
- navigate within the portal web site
- properly set up the service
- connect a device to the service.

This section also explains how to register a purchased contract after a trial contract has expired or if you have purchased the contract from your sales representative without a trial. You must configure both the portal web site and the devices you want associated with the service before you can use the service.

If you are connecting to the portal web site for the first time, you must register your device or devices on the Fortinet Technical Support web site. You must also create a trial contract, which is available on the portal web site, if you have not already purchased a contract from your sales representative.

After setting up the service, you can configure additional devices to connect to the service. You do not need to configure other Service Account IDs or additional contracts. You only need to:

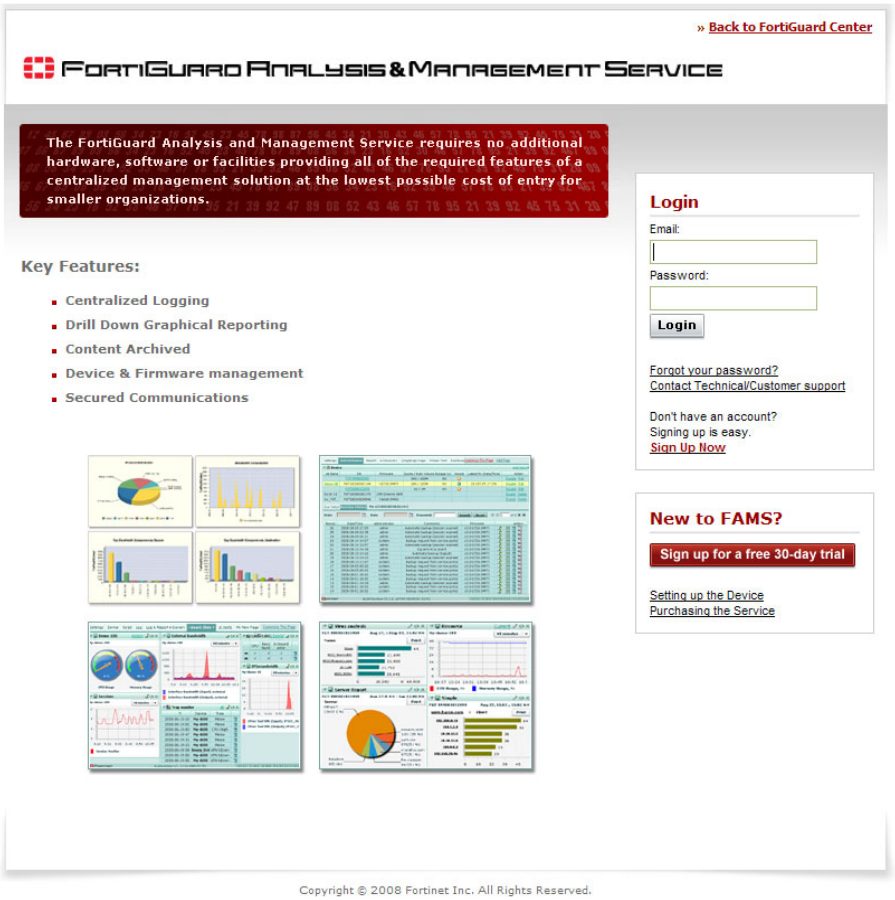
- add device serial numbers to the portal web site and authorize the device to use the service
- configure your devices within their own web-based manager to use the Service Account ID.

This section includes the following topics:

About the portal web site

The service is provided to devices through the Internet, and managed through a portal web site. The portal web site displays not only customer login fields, but also a link that enables you to configure a trial contract. There is also a bulleted list of the key features and benefits of the service. You can view the site from https://fams.fortinet.com.

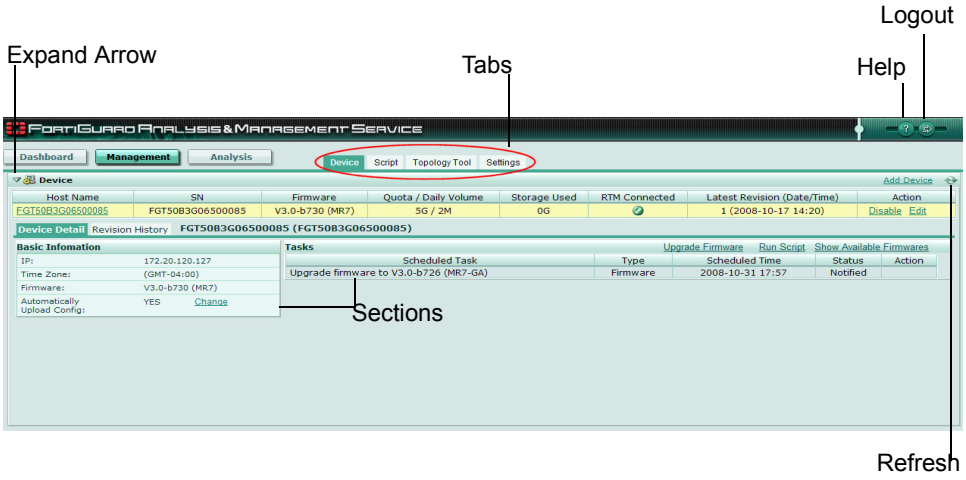
Figure 1: The portal web site



When you enter the email address and password for logging in, the Service Account ID appears. You can select which Service Account ID you want to view when logging in to the portal web site if you have multiple Service Account IDs for one contract. Certain contracts allow for multiple Service Account IDs, which provides more flexibility. Contracts can allow both multiple devices and multiple service account IDs. For more information, see “Obtaining a trial contract” on page 14.

After logging in to the web site, the layout of the information provides the administrator quick and easy access to various features. There are three main menus, Dashboard, Management and Analysis. These main menus contain tabs and sections to help you view and configure settings.

Figure 2: Portal web site layout, Management view



Dashboard main menu The Dashboard main menu provides all features that are related to it, such as customizing and adding pages. You can add widgets to the pages as well.

Dashboard	The Dashboard tab allows you to configure the widgets and their layout. You can also make the Dashboard tab the default page.
Customize	The Customize link allows you to configure a new page.
New page	The New page link allows you to add a new page to the Dashboard menu.

Management main menu The Management main menu provides remote management features, such as settings and device information.

Device	The Device tab provides information about the devices, such as connection status to the service, tasks, and revision history. You can also schedule upgrades for devices and run scripts.
Script	The Script tab allows you to upload, input and manage scripts.
Topology Tool	The Topology Tool tab allows you to configure a network diagram of your network.
Settings	The Settings tab provides account and user information, and allows you to configure alert profiles.

Analysis main menu The Analysis main menu provides logging and reporting features.

Log Viewer	The Log Viewer tab allows you to view recent logs that are received in real-time, as well as historical log files that are stored on the FortiGuard Analysis server.
Log File Browser	The Log File Browser tab allows you to browse through historical log files.
Report	The Report tab provides access to all reports.
e-Discovery	The e-Discovery tab allows you to perform advanced searches of email messages.

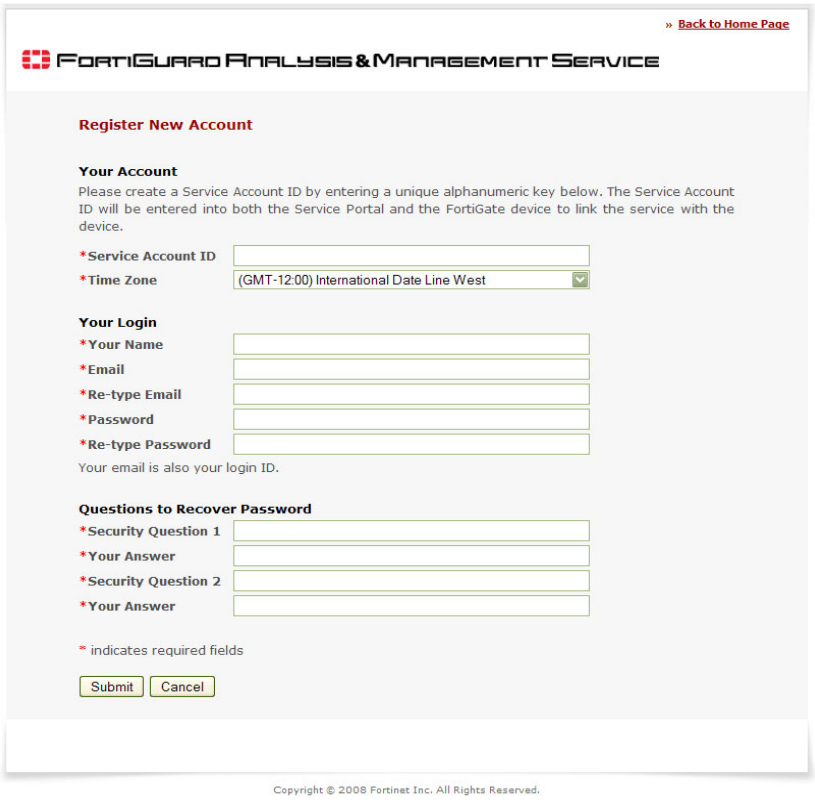
Section	Each tab contains sections, which can display a combination of information and links to configure additional settings. You can also expand or hide sections using the Expand Arrow. For example, in the Device tab, shown in Figure 2 on page 13, the Tasks section allows you to view the tasks that are occurring (or have already occurred), as well as to configure an upgrade, run scripts, or show the firmware available for upgrading the device.
Help	Online help provides help on the various service features and configuration settings.
Log out	Log out logs you out of the portal web site.
Refresh icon	The Refresh icon, displayed on many pages, allows you to immediately update the page contents.

Obtaining a trial contract

When you first access the portal web site, you can immediately sign up for a trial contract. With a trial contract, you can familiarize yourself with the features the service provides before committing to a full contract. The trial contract lasts 30 days, after which you can purchase a full contract from your sales representative. After purchasing a full contract, use the procedure, “To add a purchased contract to a Service Account ID” on page 21.

After creating the service account and login, you need to authorize and configure devices to use the service. Follow the procedures in “Configuring a device to use the service” on page 16.

Figure 3: Registering for a trial contact



Note: If you have previously logged in to the service portal, and want to create another trial contract or enter a purchased contract number, you may need to create a second Service Account ID. Devices can use only one Service Account ID at a time per contract. Instead, add new contracts to your existing Service Account ID. For more information, see "Expanding or renewing service" on page 19.

To obtain a trial contract

1. Go to https://fams.fortinet.com/.
2. Select the Sign Up Now link.
3. Enter the appropriate information for the following fields:

Your account	The information you enter in this section will be used to identify the account you associate your devices with, and to determine log and report time periods of the devices.	
	Service Account ID	Enter an identification name. This name can contain both letters and numbers, and be up to 20 characters. Use an underscore (_) or hyphen (-) to separate letters or numbers in the name.
	Time Zone	Select the time zone that the device is in. Time measurements, such as log time stamps and schedules for changing firmware that may appear for your managed devices in the portal web site, are relative to this time zone.
Your Login	You will use the information that you enter here to log in to the portal web site.	
	Your Name	Enter the email address for the main administrator, which is similar to the default admin administrator on a device. This default user for the portal web site is referred to as the admin user.
	Email	Enter the email address that will be used for sending reports to.
	Re-type Email	Enter the email address you gave in the Email field.
	Password	Enter a password for logging in to the portal web site.
	Re-type Password	Enter the password you gave in the Password field.
Questions to Recover Password	These questions will help to identify you when you need to recover your password. You need to make sure the following information is easy to retrieve when you need to recover your password.	
	Security Question 1	Enter a challenge that can be used to verify your identity in the event you need to retrieve your password.
	Your Answer	Enter the answer for Security Question 1.
	Security Question 2	Enter a second challenge that can be used to verify your identity in the event you need to retrieve your password.
	Your Answer	Enter the answer for Security Question 2.

4 Select Submit.

You are automatically logged in to the portal web site. You should immediately log out of the portal web site so that you can configure the devices to use FortiGuard Analysis and Management Service. You will also receive an email from fams_admin@fortinet.com verifying your trial contract.

If you want to add a purchased contract, you do not have to create a second service account. Instead, you can add contracts to your existing service account. For more information, see "Expanding or renewing service" on page 19.

Configuring a device to use the service

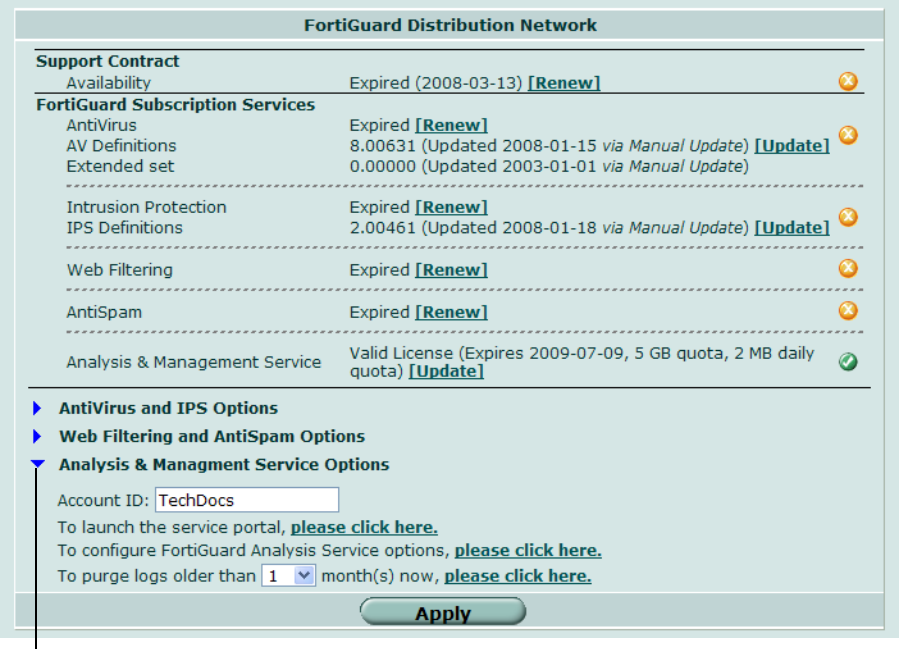
You need to configure devices to use the service after signing up for a trial contract or after purchasing a contract. You need your Service Account ID to enable the service on your devices. If you want multiple devices associated with the same Service Account ID, you need to configure each device with that Service Account ID.

Note: If you do not know your Service Account ID, you can view it by logging in to the service portal and going to the Settings menu. The Service Account ID is located in Account Information. Alternatively, log in to the Fortinet Technical Support web site, and select the service.

To configure the Service Account ID and validate connectivity

1 In the FortiGate web-based manager, go to **System > Maintenance > FortiGuard**.

Figure 4: The FortiGuard "Analysis & Management Service Options", as displayed in the FortiGate web-based manager



2 Select the Expand Arrow beside Analysis & Management Service Options to reveal the available options.

3 Enter the service account ID in the Account ID field.

The service account ID entered here will be used to identify that the device is associated with that service account.

4 Select Apply.

In the FortiGuard Subscription Services area of the FortiGuard page, you should see a green checkmark in the Analysis & Management Service row, as in Figure 4. You should also see a green checkmark on the System dashboard of your device, under License Information (beside Analysis and Management Service). If you see an orange X, your device is not properly connected; if you see a gray X, your device is not connected. For more information, see "Verifying the connectivity between the service and the device" on page 17.

After successfully configuring your device, you also need to enable central management, and, if applicable, configure remote logging. For more information, see "Configuring remote logging and central management" on page 17.

Verifying the connectivity between the service and the device

The device connects to the Fortinet Distribution Network (FDN) to validate connectivity with that Service Account ID. After successful validation, the options for configuring and using the service become available on the device's web-based manager. You should also see a green check mark beside Analysis and Management Services under License Information in the System dashboard of the device.

If you have not yet authorized the device to use the service, the service license status may appear to be Expired or Not Registered, and the device will not be able to connect to the service. To authorize the device, see "Authorizing the service on devices" on page 38.

If you have authorized the device from the portal web site, but the device is still unable to connect, verify that the device's system time and time zone are correct. If these are incorrect, the SSL connection will fail; you must then enter the correct system time and zone on the FortiGate unit. For more information, see the *FortiGate Administration Guide.*

Configuring remote logging and central management

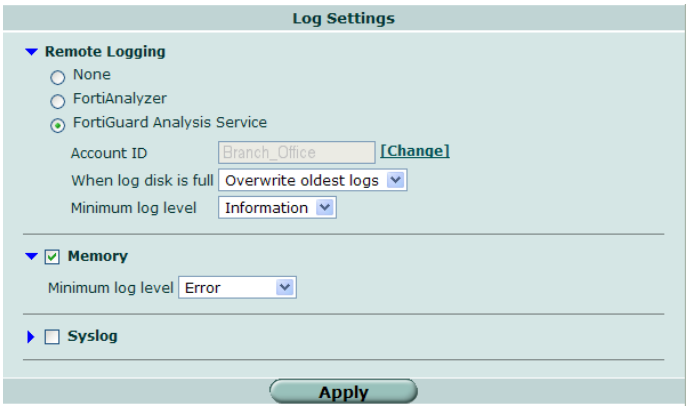
After configuring the Service Account ID on the device's web-based manager, you need to also configure central management and, if applicable, logging. The service provides both central management of the device as well as logging and reporting capabilities.

The following procedures describe how to enable and configure both remote logging and central management.

To configure remote logging to the service

1 In the FortiGate web-based manager, go to **Log&Report > Log Config > Log Setting**.

Figure 5: FortiGuard logging options in Log Setting



2 Select the Expand Arrow beside Remote Logging to reveal the available options.

3 Select FortiGuard Analysis Service.

If this check box is grayed out, authorize the device from the portal web site and configure the Service Account ID before performing this step. For more information, see “To configure the Service Account ID and validate connectivity” on page 16.

4 From “When log disk is full”, select what the service should do when the device reaches its quota: either Overwrite oldest logs or Do not log.

5 From “Minimum log level”, select one of the following log severity levels:

0 - Emergency	The system has become unstable.
1 - Alert	Immediate action is required.
2 - Critical	Functionality is affected.
3 - Error	An error condition exists and functionality could be affected.
4 - Warning	Functionality could be affected.
5 - Notification	Information about normal events.
6 - Information	General information about system operations.

Messages with an equal or lesser severity will be sent to the service.

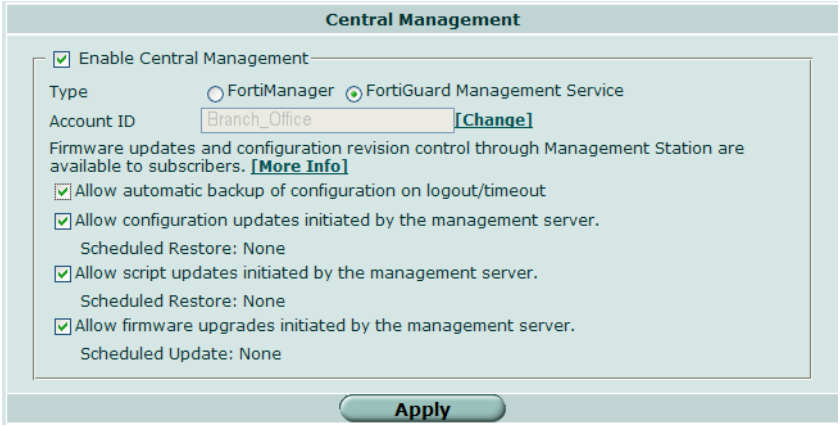
6 Select Apply.

Note: Daylight Savings Time (DST) may affect your location. It is recommended to verify if your location observes this change, since it affects the accuracy and schedule of logs. For more information, see the Fortinet Knowledge Center article, New Daylight Saving Time support.

To configure remote management by the service

1 In the FortiGate web-based manager, go to **System > Admin > Central Management**.

Figure 6: Central Management options



2 Select the check box beside Enable Central Management.

3 From Type, select FortiGuard Management Service.

4 Select Apply.

5 Select any of the following options that you want enabled:

Allow automatic backup of configuration on logout/timeout	Automatically upload a new configuration revision to the service when an administrator logs out or the session times out. Most configuration changes cause an automatic backup. Exceptions include VPN certificates, topology, FortiGuard license status, host name, high availability (HA) override and priority, and network interface media access control (MAC) address.
Allow configuration updates initiated by the management server	Allow the device to receive configuration changes scheduled from the portal web site.
Allow script updates initiated by the management server	Allow the device to receive script changes scheduled from the portal web site.
Allow firmware upgrades initiated by the management server	Allow the device to be upgraded by the management server.

6 Select Apply.

Note: The options for the service in Central Management appear only after you have configured the Service Account ID.

Expanding or renewing service

You can expand or renew the service after accessing the portal web site for the first time. The Fortinet Technical Support web site allows you to expand or renew the service after a trial contract expires, or after you have purchased a full contract.

Renewing contracts

If you want to extend the service period, you can add a renewal contract to the previous contract.

Note: Contract renewal requires an existing contract. If you have not yet added your first contract, add the first contract, then add the renewal contract. For more information, see "Obtaining a trial contract" on page 14 and "Adding purchased contracts" on page 21.

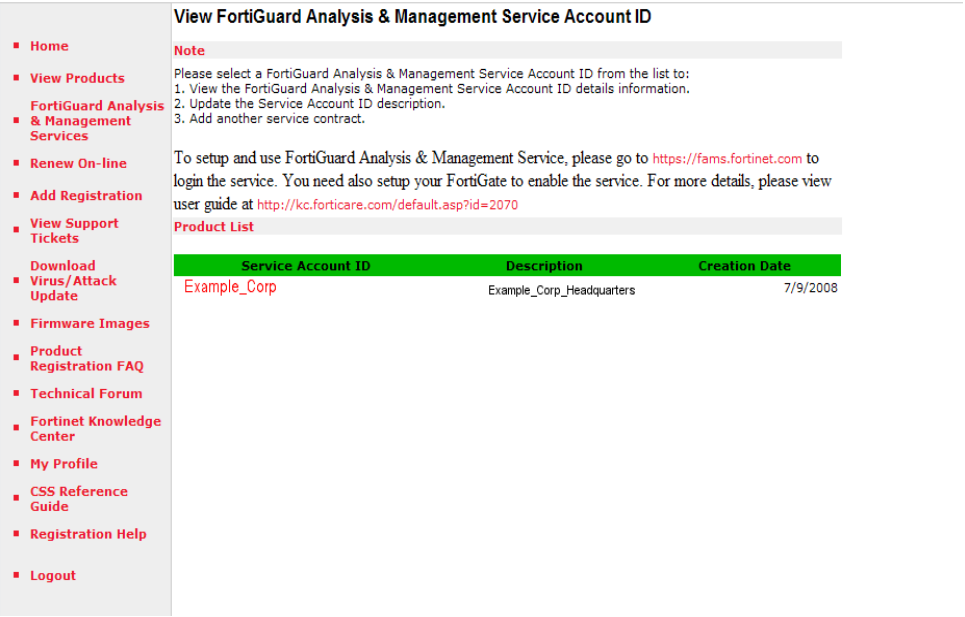
To add a renewal contract

1 Go to the Fortinet Technical Support web site and log in.

2 Select FortiGuard Analysis & Management Services from the menu on the left.

3 Select the Service Account ID to which you want to apply the contract number.

Figure 7: Locating the Service Account ID

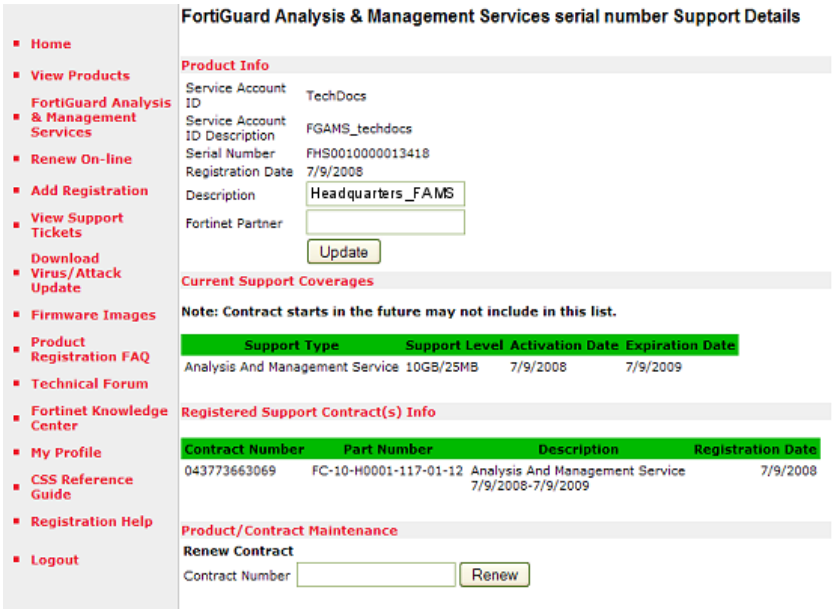


Near the bottom of the page, a serial number list appears.

4 Select the Serial Number of the contract that you want to renew.

5 In the Product/Contract Maintenance area, enter the Contract Number.

Figure 8: Contract Number



6 Select Renew.

The terms of the contract appear.

7 If you agree, select Agree. A contract term confirmation appears.

If you do not agree to the terms of the service contract, select Don't Agree.

8 If your contract details appear to be correct, select Complete Registration.

If you have renewed at an increased or decreased service level, you may want to adjust quota and other settings from the portal web site. For more information, see "Adding and editing devices" on page 37.

Adding purchased contracts

You can continue service beyond the duration of a trial contract period by adding a purchased contract. You can also expand the disk space available to your service account by purchasing a contract for a larger amount of space.

If you have previously obtained a trial contract or entered a purchased service contract, you do not need to create separate Service Account IDs for each contract. Instead, you can add service contracts to your existing Service Account ID. If you choose to create an additional Service Account ID, its service contracts and portal logins will be separate. Devices can use only one Service Account ID at a time.

Note: If you have already added your first contract, and want to renew it, see "Renewing contracts" on page 20.

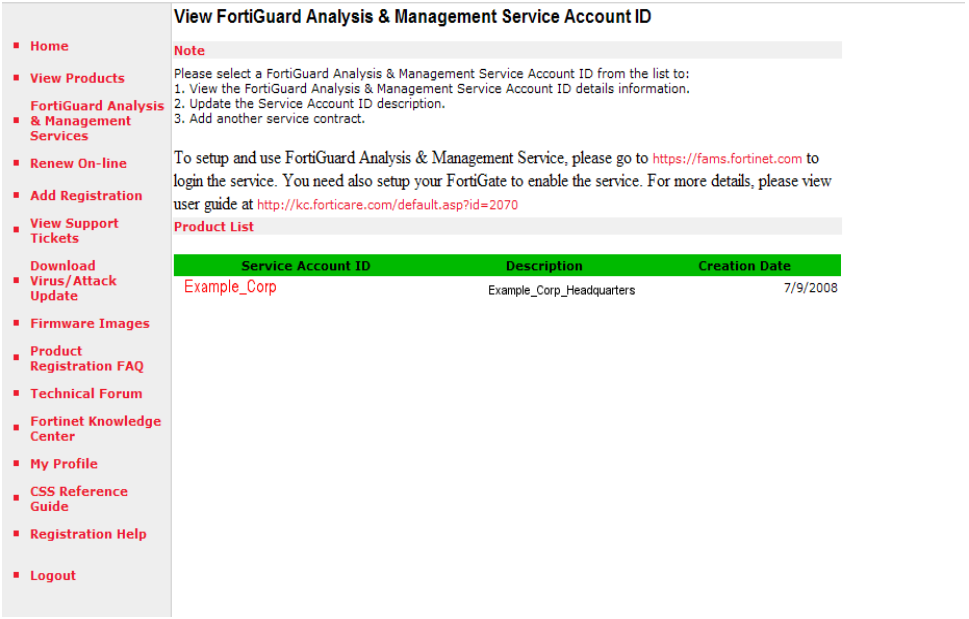
To add a purchased contract to a Service Account ID

1 Go to the Fortinet Technical Support web site and log in.

2 Select FortiGuard Analysis & Management Services from the menu on the left.

3 Select the Service Account ID to which you want to add the purchased contract.

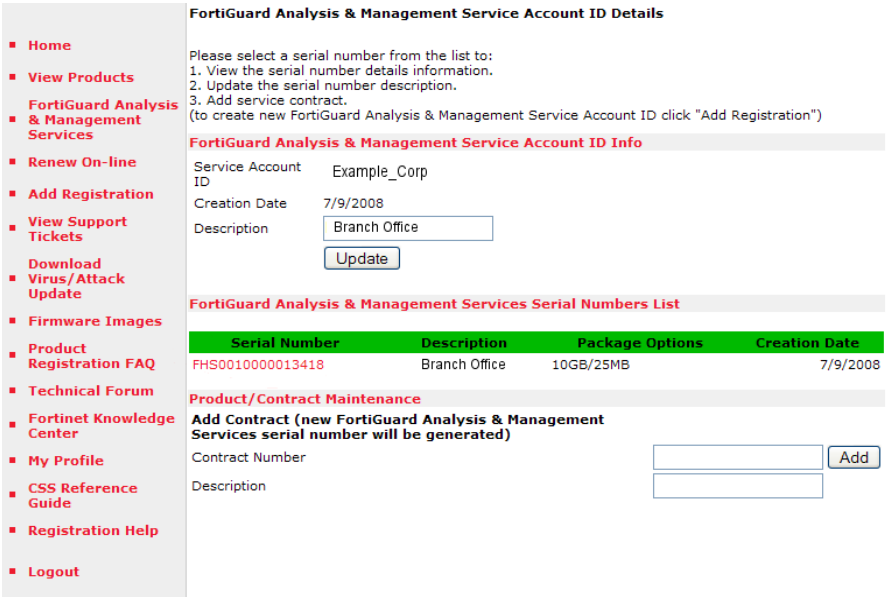
Figure 9: Locating the Service Account ID



Near the bottom of the page, a Product/Contract Maintenance area appears.

4 Enter the Contract Number and a Description in the appropriate fields.

Figure 10: Adding a purchased contract



5 Select Add.

The terms of the contract appear.

6 If you agree, select Agree. A contract term confirmation appears.

If you do not agree to the terms of the service contract, select Don't Agree.

7 If your contract details appear to be correct, select Complete Registration.

If you have added a contract for a different service, or added a contract with service levels greater than a trial contract, you may want to authorize devices to use the new service, or adjust settings such as quota, and configure devices to allow remote logging or central management. Continue setup with “Management” on page 35.

Required port numbers

The service is provided to authorized devices connecting to the Fortinet Distribution Network (FDN) through the Internet. For successful access to the service, all NAT devices and firewalls between the FDN and the devices must permit required protocols and port numbers.

For more information, see the Fortinet Knowledge Center article, Traffic Types and TCP/UDP Ports used by Fortinet Products.

Dashboard

The Dashboard main menu allows users to customize what system information they want to monitor, such as virus activity and system resources, which are displayed as widgets. Within this menu, users can also add tabs, which are referred to as pages. These pages contain widgets which you can customize.

The information provided by the widgets allows users to quickly assess what is occurring on their networks and on the devices. For example, your Virus Report widget may report that a specific virus has been detected several times. When you select the virus name in the widget, you are redirected to the FortiGuard Center's Virus Encyclopedia page for that virus, which provides additional information about it.

The following topics are included in this section:

The Dashboard main menu

The Dashboard main menu provides users the flexibility they need to monitor the network and devices. Within this menu, users can add the widgets they want to view, make a specific page the default page, or edit existing widgets.

You can customize the Dashboard page (located within the Dashboard tab), by editing the existing default widgets, or by adding or removing widgets. You can also change the widget layout on this page. The Dashboard page is the default page that appears when you first access the Dashboard main menu.

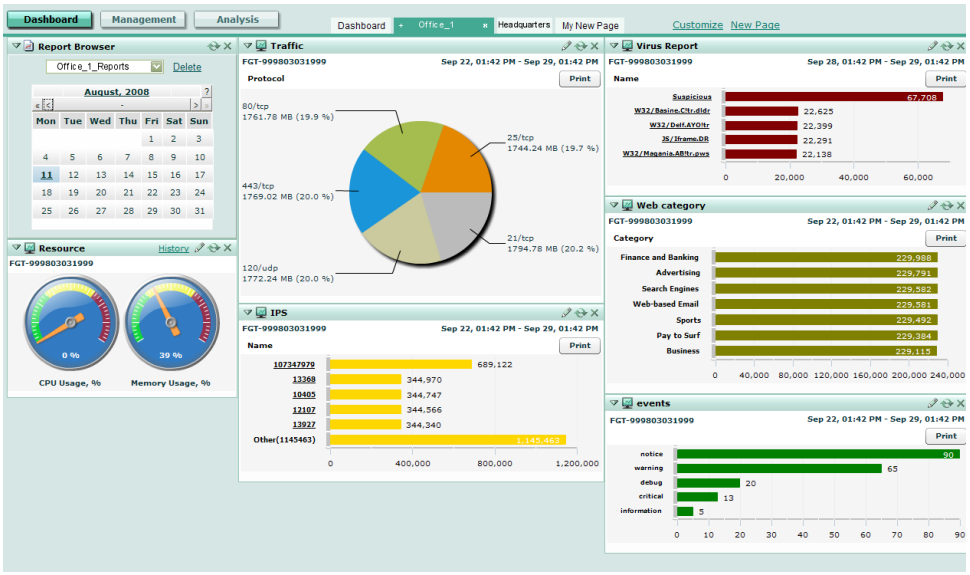
You can add nine pages and customize them with different combinations of widgets. You can also delete these pages.

When customizing the Dashboard page or other pages, you can choose from the following widgets:

- Resource Monitor
- Network Monitor
- Trap Console
- Traffic Report
- Event Report
- Virus Report
- IPS Report
- Web Report
- Spam Report
- Report Browser

These widgets are similar to those available on the device's web-based manager. There are five default widgets that appear on the Dashboard page: Report Browser, Resource Monitor, Traffic Report, Event Report, and Web Category Report.

Figure 11: Customized Dashboard page



Widgets

The Dashboard widgets provide valuable information about what is happening on your network. The information gathered is received from logs and SNMP requests. You can customize the Dashboard page (the default tab and any that you add), to display a variety of these widgets.You can also customize each widget to your requirements.

There are three widgets that receive their information from sources other than logs: Resource Monitor, Network Monitor and Trap Console. The other widgets, which include Report Browser, are all report widgets and receive all of their information from logs.

Most widgets contain the following arrows and icons so that you can better customize each individual widget:

- Expand Arrow – displays or hides widget details
- Edit – configures widget settings
- Refresh – immediately updates the display
- Print – prints the information of that widget as hardcopy
- Delete – removes the widget from the page.

When you are ready to configure a widget, you can select the + sign beside the name of the page you want to configure widgets for. The + sign reveals the Dashboard's main menu options, which also enable you to set the page as the default page. The default page is the page that appears when you access the Dashboard main menu.

Adding and customizing pages

You can add up to nine pages within the Dashboard main menu, and you can customize the widgets that you apply to those pages. The following procedure explains how to do so.

To add and customize a page

1. Go to the Dashboard main menu.
2. Select the New Page link.
3. Select the widget that you want and customize that widget's information. See "Configuring widgets" on page 27 for detailed instructions.

   The name of each widget should be clear and understandable (for example, Headquarters_TrafficReport). You can enter up to 42 characters.
4. After configuring the widgets, if applicable, select Change Layout.
5. Select the layout you want from the available layout options.
6. If you want to make this page the default page, select Set Default Page and then select the check box beside "is default page".
7. Select Save Settings to save your page.

Configuring widgets

You need to configure widgets when you are adding them to a page. Widgets provide information that is quickly accessed and viewed by users. You can also edit these widgets after configuring them. The following information explains how to configure each individual widget.

Note: When configuring widgets, you must first reveal the Dashboard's main menu options. To reveal these options, select the + sign beside the name of the page that you want to configure widgets for.

Configuring the Resource Monitor

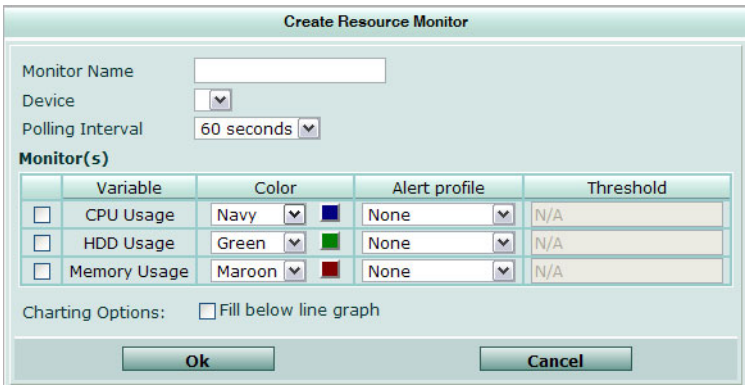
The Resource Monitor provides information about how much or how little CPU, HDD, and Memory resources are being used on the device. This widget displays each resource usage, such as CPU, as a gauge.

To configure a Resource Monitor widget, select Add Resource Monitor in Add Widgets, follow the instructions in the table below, and select OK. If you want to edit an existing Resource Monitor widget, select the Edit icon in the widget and then follow the instructions in the table below. Select OK to save the changed settings.

After configuring the Resource Monitor widget, you can switch from Current to History. Current allows you to view the line chart while History allows you to view the gauges that display the resources being monitored.

To switch to History, select Current beside the Edit icon. To switch to Current, select History beside the Edit icon.

Figure 12: Resource Monitor



Monitor Name Enter the name of the resource monitor (for example, Resource_Monitor_Headquarters).

Device Select the device that the information is gathered from.

Polling Interval Select how often the server will poll the device to receive information, in intervals of 60 seconds, 2 minutes, or 5 minutes.

Monitor(s) Select the monitors to include in this widget, with the following options to specify what each will contain:

- **Variable** The name of the variable.
- **Color** The color that will appear for that variable. You can select a color from either the list or the color block. When you select the color block, the Color Palette appears; select a color and then select OK to apply it to the variable.
- **Alert profile** The alert profile to use for that variable. For more information about alert profiles, see "Configuring an alert profile" on page 55.
- **Threshold** Enter the threshold (maximum) number for the variable.

Charting Options Select the check box if you want the line in the graph to fill in below the line.

OK Select to save the settings (current session only).
Note: You must select **Customize > Save Settings** from the Dashboard if you want your settings to be saved permanently.

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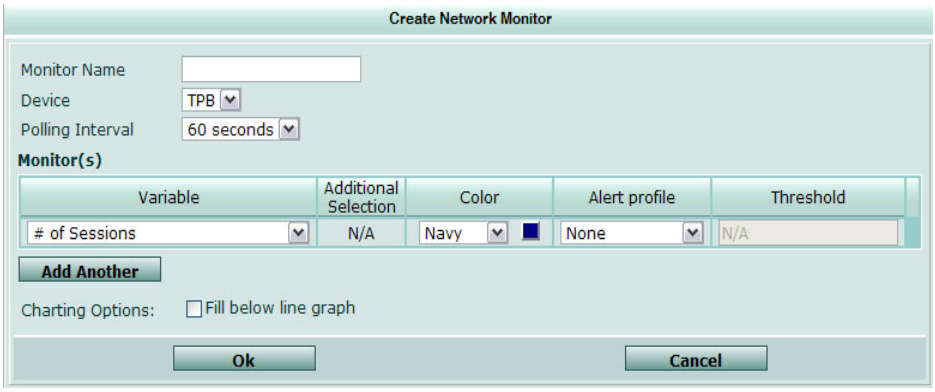
Configuring the Network Monitor

The Network Monitor provides information about what is happening on the network for which the device is currently configured.

To configure a Network Monitor widget, select Add Network Monitor in Add Widgets, follow the instructions in the table below, and select OK. If you want to edit an existing Network Monitor widget, select the Edit icon in the widget and then follow the instructions in the table below. Select OK to save the changed settings.

Figure 13: Network Monitor



Monitor Name	Enter the name of the network monitor (for example, Network_Monitor_Headquarters).
Device	Select the device that the information is gathered from.
Polling Interval	Select how often the server will poll the device to receive information, in intervals of 60 seconds, 2 minutes, or 5 minutes.
Monitor(s)	Select the monitors to include in this widget, with the following options to specify what each will contain:
Variable	The type of variable or monitor that is available in the list.
Additional Selection	Depending on the monitor selected, you can also select the type of interface (for example, external).
Color	The color that will appear for that variable. You can select a color from either the list or the color block. When you select the color block, the Color Palette appears; select a color and then select OK to apply it to the variable.
Alert profile	Select the alert profile to use for that variable. For more information about alert profiles, see “Configuring an alert profile” on page 55.
Threshold	Enter the threshold (maximum) number for the variable.
Add Another	Select to add multiple monitors to the list.
Charting Options	Select the check box if you want the line in the graph to fill in below the line.
OK	Select to save the settings (current session only). **Note**: You must select **Customize > Save Settings** from the Dashboard if you want your settings to be saved permanently.

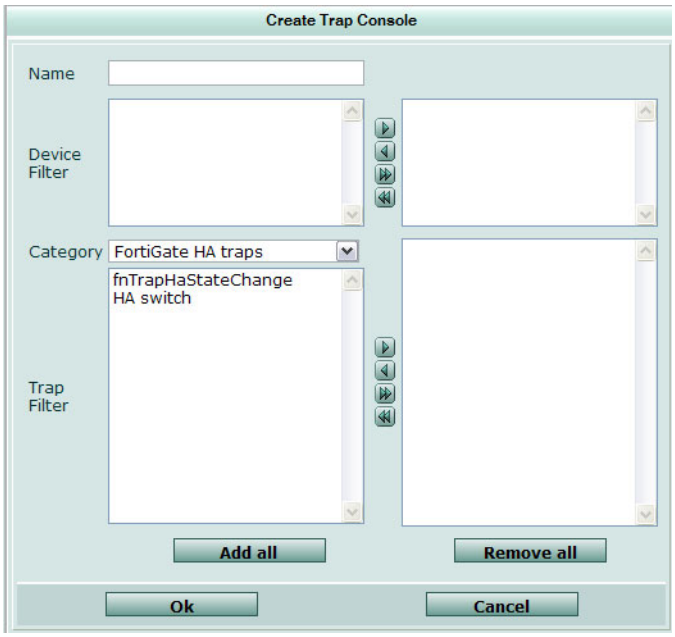
•

Configuring the Trap Console

The Trap Console provides information about SNMP traps. The Trap Console provides monitor or alert information, helping you to determine what trap you need to monitor.

To configure a Trap Console widget, select Add Trap Console in Add Widgets, follow the instructions in the table below, and select OK. If you want to edit an existing Trap Console widget, select the Edit icon in the widget and then follow the instructions in the table below. Select OK to save the changed settings.

Figure 14: Trap Console



Name	Enter the name of the trap console (for example, Trap_Console_Headquarters).
Device Filter	Select the device or devices that the information is gathered from. Use the arrows to move devices over to the right column.
Category	Select the category of traps to include in the trap console.
Trap Filter	Select the available traps within the selected category. You can specify one, multiple, or all trap filters using the arrows to move the traps to the right column.
Add all	Add all the available traps within the category to the right column.
Remove all	Remove all the available traps within the category back to the left column.
OK	Select to save the settings (current session only). **Note**: You must select **Customize > Save Settings** from the Dashboard if you want your settings to be saved permanently.

•

Configuring the Report widgets

The Report widgets provide information that is gathered from logs on devices, such as traffic activity, viruses and web activity. Each report can be displayed either as a bar or pie chart. From anywhere in a chart, you can drill down to view second-level information for that report.

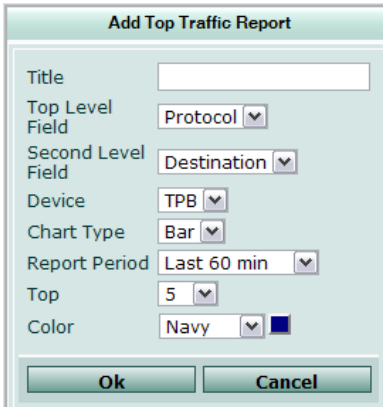
The seven available report widgets are:

- Traffic Report – provides information about network traffic based on traffic logs

- Event Report – provides information about event activity that is based on event logs, such as an administrator logging in to that device's web-based manager.
- Virus Report – provides specific information about each real or suspected virus that the device detects; selecting the name of a virus redirects you to the FortiGuard Center Virus Encyclopedia for additional information
- IPS Report – provides information about IPS anomalies and signatures
- Web Report – provides information about Internet activity and visited web sites
- Spam Report – provides information about spam activity
- Report Browser – displays all reports that are generated; this widget displays the same information as in **Analysis > Report**, and does not need to be configured.

To configure a report widget, select the report widget in Add Widgets, follow the instructions in the table below, and select OK. If you want to edit an existing report widget, select the Edit icon in the widget and then follow the instructions in the table below. Select OK to save the changed settings.

Figure 15: Report configuration screen (Traffic Report displayed)



Title	Enter the name of the report. For example, Headquarters_Traffic indicates the type of report and specific context.
Top Level Field	Enter the level of information that appears first. For example, you would select Source from the Top Level list in a Traffic Report to have the source IP addresses display first.
Second Level Field	Enter the level of information that gives details about the top level information. You can access this information by selecting the top level information (for example, a bar in the bar chart).
Device	Select the device from which to gather the information.
Chart Type	Select the type of chart used for displaying the information, either a bar chart (default) or a pie chart.
Report period	Select the period of time when these activities or events happened. For example, select 24 hours to display the last 24 hours of network traffic. If you want to specify a time range, select Specify from the list. The options From date and To date appear.
From date	The start date and time of the time range. Appears only when Specify is selected in Report period. Select the calendar to configure a start date and time. Select OK after configuring both the date and time.

To date	The end date and time of the time range. Appears only when Specify is selected in Report period. Select the calendar to configure the end date and time. Select OK after configuring both the date and time.
Top	Enter the top number of entries to be displayed. For example, select 10 from the list so that only the top 10 events display.
Color (Bar chart only)	Select the color of the bars on the bar chart. This is available only when bar chart is selected. You can select a color from either the list or the color block. When you select the color block, the Color Palette appears; select a color and then select OK to apply it to the variable.
OK	Select to save the settings (current session only). **Note**: You must select **Customize > Save Settings** from the Dashboard if you want your settings to be saved permanently.

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Figure 16: Traffic Report pie chart displaying the top traffic level by protocol

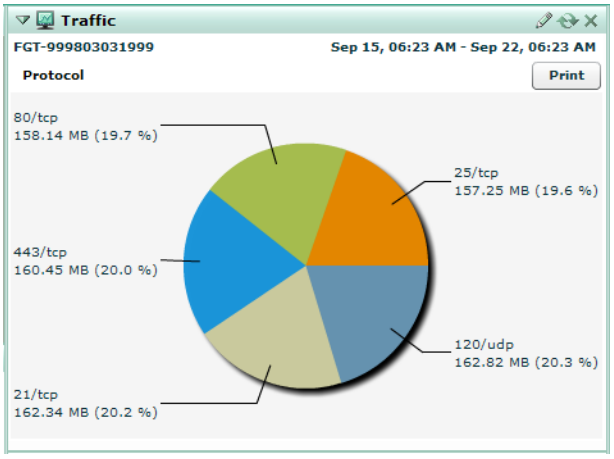


Figure 17: Traffic Report pie chart displaying second-level information for 80/tcp

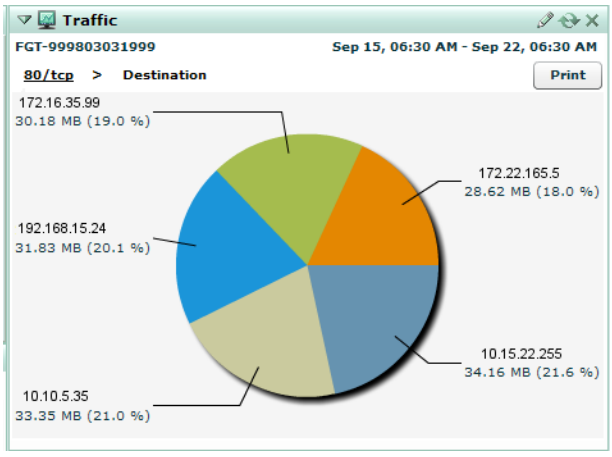


Figure 18: Web Report bar chart displaying the web category names

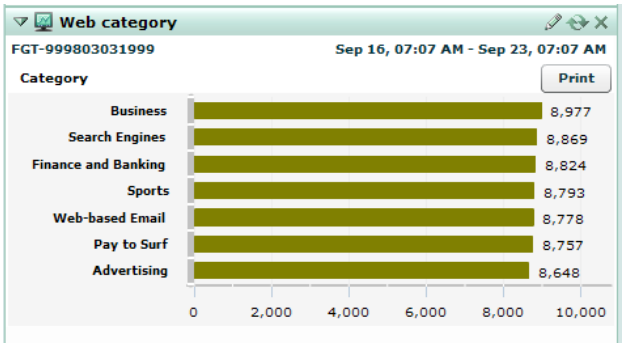
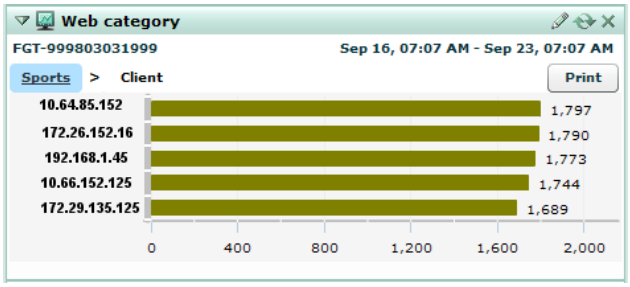


Figure 19: Web Report bar chart displaying second-level information for the Sports category



Customizing the Dashboard page

You can customize the Dashboard page by adding, rearranging or removing widgets. The customized widgets and layout can then be saved for future logins.

The following procedure describes how to customize the Dashboard page, rename it, and delete it. The Dashboard page always appears after you log in to the portal web site if you have not made another page the default page.

To customize the Dashboard page

1. Go to Dashboard main menu.
2. If the Dashboard page is not the default page, select Dashboard.
3. Select the + sign beside the name to reveal the Dashboard's main menu options.
4. Edit the Dashboard page so that it is customized to your specific requirements.
5. Select Save Settings to save the customized settings.
6. If you want to rename the Dashboard page, select the name, delete the existing name, and then enter the new name.
7. To delete the page, select the x beside the name.

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Management

The Management menu provides remote management features, allowing you to upload scripts, schedule when to upgrade firmware on a device, and view account information.

This section includes the following topics:

Device

The Device tab provides information about devices, and allows you to schedule firmware upgrades or run scripts. You can also de-authorize the service for devices.

The service can receive and deploy configuration revisions between the service and licensed, managed devices, thus serving as both an off-site backup and a management portal. From the portal, you can view and search configuration revisions that have been received from your managed devices, create scripts from configuration revisions, and restore configuration revisions to devices.

This topic includes the following:

Viewing device information

The Device section (in the Device tab) displays detailed information about each registered device, including the status of its connection with the service. This section contains additional tabs at the bottom to allow you to view details, tasks and revision history for a device.

You can view this detailed information about each device by selecting the device's host name, located in the Host Name column of the Device section. Each tab and section provides information specific for the device you are currently viewing, which is highlighted in the Device section.

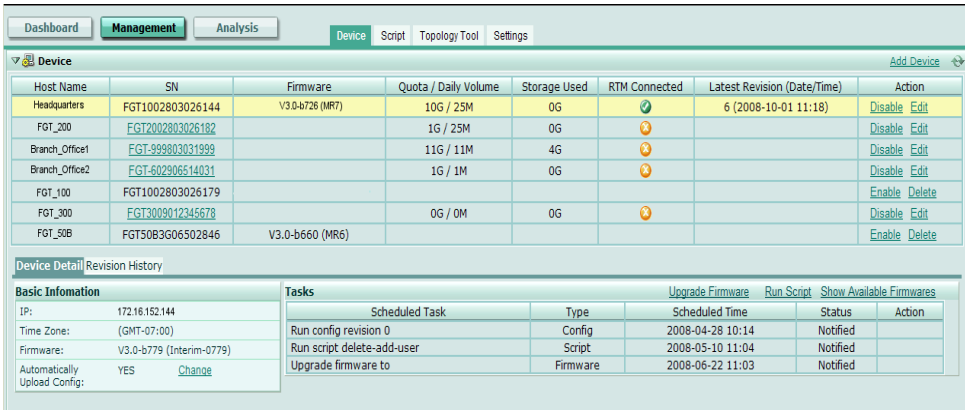
The Device Detail tab displays the Basic Information section, which shows information such as the internal IP address of the device and the current firmware version running on the device.

This tab also displays the Tasks section, which shows information about scheduled tasks. You can also upgrade firmware or run scripts from this section. For more information, see “Changing firmware from the portal web site” on page 44 and “Creating scripts” on page 46.

The Revision History tab allows you to search configuration revisions to find a configuration change that occurred on a device.

To view device information, go to **Management > Device**.

Figure 20: Devices in the Device section of the Device tab



Device section

Add Device	Add a device to the contract.
Host Name	The name you entered for your device. This name can be unique, or it can be the default host name. Select the device’s host name to view each device’s information.
SN	The serial number of the device.
Firmware	The firmware image currently running on the device. The firmware image is displayed in the format: `V<version_number>-b<build_number>(<mainentance_release_ number>)` Example: `V3.0-b660(MR6)`.
Quota / Daily Volume	Displays the daily volume and quota that is assigned to the device, in the format `<number>G/<number>M`. Example, `8G/10M`.
Storage Used	The amount of storage already used by the device.
RTM Connected	The connection status of the device. The orange X status indicates that the device has authorized use of the service, but is not connected. The green check mark indicates that the device is authorized to use the service and is connected to the service.
Last Revision (Date/Time)	The latest revision that occurred. The date and time format is `<number_incremental>(yyyy:mm:dd hh:mm)`. For example, `3(2008-05-13 12:16)` means that the latest revision is the third in the list and that it occurred on May 13, 2008, at 12:16. Revisions are given an incremental number, starting at 1 and increasing as revisions are created.
Action	Select Disable to de-authorize the service to that device, or Enable to authorize it. Select Edit to change the daily volume and quota amounts.

Basic Information section

IP	The internal IP address of the device.
Time Zone	The time zone associated with that device.
Firmware	The current firmware image running on the device. The firmware image is displayed in the format: `v<firmware_version>-<build_number>(<maintenance release_number>).`
Automatically Upload Config	The current action the device will take when a configuration is saved: **NO** – the device will not automatically upload the configuration **YES** – the device will automatically upload the configuration. Select Change to change whether the device will automatically upload a saved configuration or not.

Tasks section

Upgrade Firmware	Upgrade the firmware on the device. For more information about upgrading a device's firmware, see "Changing firmware from the device" on page 45 and "Changing firmware from the portal web site" on page 44.
Run Script	Run a script file. For more information about scripts, see "Creating scripts" on page 46 and "Running scripts" on page 43.
Show Available Firmware	Displays all available firmware for the devices. For more information, see "Viewing available firmware images" on page 44.
Scheduled Task	The name of the scheduled task.
Type	The type of task that will be performed. There are three types: Config (configuration upload), Script (running a script), and Firmware (upgrading a firmware image).
Scheduled Time	The date and time of when the schedule task will begin. The date and time are in the format, `yyyy-mm-dd hh:mm:ss`.
Status	The status of the scheduled task.
Action	The action you can take to delete or edit a schedule. The Delete and Edit icons appear after the schedule task starts.

Revision History section

The Revision History section provides a list of backed up configurations. You can also compare configurations to view what changed between revisions. For more information, see "Viewing configuration revisions" on page 39.

Adding and editing devices

You can add devices to the contract or edit the daily volume and quota for a device. Adding devices to a contract is available only if your contract allows it.

To add a device

1. Go to **Management > Device**.
2. In the Device section, select Add Device.
3. Enter the appropriate information for the following:

SN	Enter the serial number of the device.
Quota (G)	Enter the total amount of disk space that the device is allowed to use.
Daily Volume (M)	Enter the amount of disk space that the device is allowed to consume per day.
Comments	Enter any comments or descriptions for that device, if applicable.

4. Select Submit.

To edit a device

1 Go to **Management > Device**.

2 In the Device section, select Edit.

3 Enter the appropriate information for the following:

New Quota (G)	Enter the total amount of disk space that the device is allowed to use.
New Daily Volume (M)	Enter the amount of disk space that the device is allowed to consume per day.
Comments	Enter any comments or descriptions for that device, if applicable.

4 Select Submit.

Authorizing the service on devices

You can authorize current registered devices or when adding devices to the service contract from the Device menu. Authorizing devices on the portal web site establishes the connection and communication between the device and the service.

To authorize service on a device

1 Go to **Management > Device**.

2 In the Device section, beside the device that you want, select Enable in the Action column.

3 Enter the appropriate information for the following:

New Quota (G)	Enter the total amount of disk space that the device is allowed to use.
New Daily Volume (M)	Enter the amount of disk space that the device is allowed to consume per day.
Comments	Enter any comments or descriptions for that device, if applicable.

4 Select Submit.

A green check mark appears in the Connected column if the authorization was successful. If not, an orange X appears in the Connected column. If the orange X appears, you must go to the device's web-based manager to reconnect to the service. For more information about connecting to the service, see"Configuring remote logging and central management" on page 17.

De-authorizing the service on devices

You can de-authorize the service associated with a device from the Device menu to disable all connection and communication between the device and the service.

To de-authorize a device from using the service

1 Go to **Management > Device**.

2 In the Device section, beside the device that you want, select Disable.

A message similar to the following appears:

```
Are you sure to disable device <fortigate_name>?
```

3 Select OK.

Sending manual or automatic configuration revisions

The service can receive manual and automatic configuration backups when you change a licensed device's configuration.

After the service receives the revisions, you can view or search them. You can also use a configuration revision to restore a device's previous configuration, or to create a script. Use the procedures in "Creating scripts" on page 46 and "Restoring configuration revisions" on page 43.

You can manually send a configuration revision to the portal web site in one of the following ways:

- From the FortiGate web-based manager, select the Backup Configuration button in the upper right corner, select to back up to FortiGuard, and then select Backup.
- From the FortiGate web-based manager, select **System > Maintenance > Backup & Restore**, select to back up to FortiGuard, and then select Backup.

If you want to automatically send configuration revisions on administrator logout or timeout, enable the feature from **System > Admin > Central Management** in the FortiGate web-based manager. For more information, see "Configuring a device to use the service" on page 16.

Viewing configuration revisions

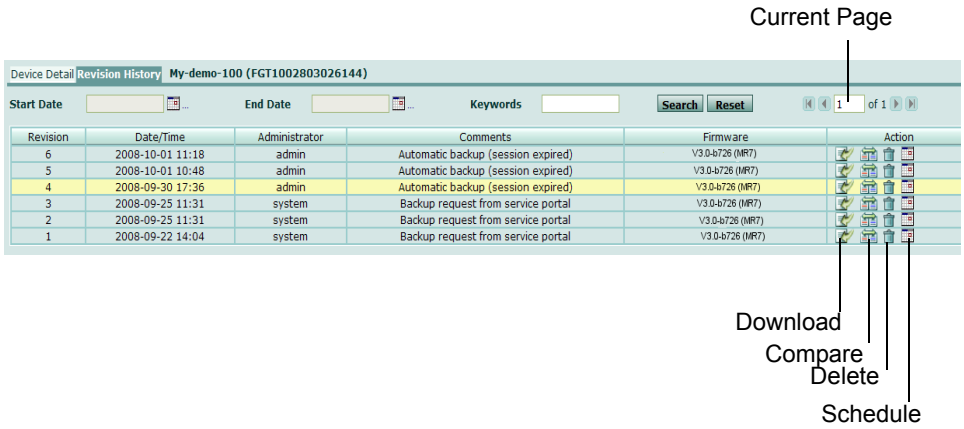
Configuration revisions can be viewed from the portal web site or the FortiGate web-based manager.

Configuration revisions will not appear on the portal web site until your devices are configured to send them. For more information, see "Sending manual or automatic configuration revisions" on page 39.

If automatic backups are configured, most configuration changes cause devices to make an automatic backup; however there are exceptions, which include VPN certificates, topology, FortiGuard license status, host name, high availability (HA) override and priority, and network interface media access control (MAC) address.

To view configuration revisions on the portal web site, go to **Management > Device > Revision History**.

Figure 21: List of configuration revisions for each device



Start Date	Select the start date of the time range of configuration files to display.
End Date	Select the end date of the time range of configuration files to display.
Keywords	Enter search terms, such as CLI keywords, then select Search to display specific configuration files.
Search	Enter search terms, then select Search to display specific configuration files.
Reset	Select Reset to clear time range and search constraints on the configuration file view.
Current Page	By default, the first page of the list of items is displayed. The total number of pages appears after the current page number. For example, if 3/54 appears, you are currently viewing page 3 of 54 pages. To view pages, select the left and right arrows to display the first, previous, next, or last page. To view a specific page, enter the page number in the field and then press Enter.
Revision	The revision number of the configuration file.
Date/Time	The date and time that the configuration revision was created.
Administrator	The user name of the administrator who created the configuration revision.
Comments	The comment that the administrator entered when creating the configuration revision. If the revision was created automatically on a logout or timeout, the comment will be `Automatic backup (session expired).`
Firmware	The firmware version that the configuration revision was created in.
Action	Select Download to download a copy of that revision's configuration file. Select Compare to examine differences between configuration revisions. Select Delete to delete a revision. Select Schedule to schedule a time period to upgrade the firmware on the device.

Searching configuration revisions

You can search configuration revisions to find a configuration change that occurred on a device.

To search a revision

1. Go to **Management > Device > Revision History**.
2. From the Device section, select the SN of the device to search.
3. Select the calendar icon next to the Start Date field, and then select the earliest date in your search's date range.
4. Select the calendar icon next to the End Date field and then select the latest date in your search's date range.
5. Enter a search keyword in the Keywords field.

   The search keyword can be any word in the configuration revision.
6. Select Search.

   Configuration revisions containing the keyword appear. When you are ready to clear the search results and display the unfiltered list, empty the Keywords field and select Search.

Comparing configuration revisions

As you accrue configuration revisions, you may want to determine what changed between two revisions. This can be useful for troubleshooting a configuration change, or for creating scripts.

Both the FortiGate web-based manager and the portal web site provides a “diff” tool, which enables you to view changes either within the context of each whole file or as isolated change lines.

To compare configuration revisions from within the portal web site

1. Go to **Management > Device > Revision History**.
2. Select the Host Name of the device that you want to compare revisions.
3. In the Action column, in the row corresponding to either one of the revisions that you want to compare, select Compare.
4. From “Compared With”, select the revision number selection method, then select or type the Revision Number.

Original Revision	Enter the number of the original revision configuration. This will be the first revision; the second revision, the one that will be compared to the original, is selected in Revision Number.
Compared With	Select either Select Revision or Specify Revision to have a specific comparison of the two revision configurations or just the selected revision. **Select Revision** – Compares with another Revision Number that you choose by selecting from the descriptive list that includes revision numbers, times, administrators, and associated revision comments for each revision. **Specify Revision** – Compares with another Revision Number that you choose by typing it.
Revision Number	The revision configuration that you are going to compare the original revision configuration with. If you select Select Revision, a list of the revision configurations appears with the revision number, date and time, user associated with that revision, and a comment.Select one of these revisions. If you select Specify Revision, enter a number for the revision configuration you want to compare with the original revision configuration.

5. To show only configuration lines which differ, select Show Different Parts Only.

   If you select Show Different Parts Only, configuration lines which differ will be highlighted with color.
6. Select OK.

   A new window appears, containing each configuration revision in a separate column, with changes highlighted.
   - Green highlight: added line
   - Yellow highlight: changed line
   - Red highlight: deleted line

   You can scroll down through the changes, or select a double arrow (<< or >>) located at the top to jump to the exact position of the next or previous change.

To compare configuration revisions from within the FortiGate web-based manager

1 In the FortiGate web-based manager, go to **System > Maintenance > Revision Control**.

2 In the Action column, in the row corresponding to either one of the revisions that you want to compare, select Diff.

3 In Revision Diff, from “Diff With”, select a second revision for comparison. You can either:

Original Revision	The revision number
Compared With	Select one of the following to compare the configurations: **Current Config** – Compares with the current configuration on your device. **Select Revision** – Compares with another revision number that you choose by selecting from the descriptive list that includes revision numbers, times, administrators, and associated revision comments for each revision. **Specify Revision** – Compares with another revision number that you choose by typing it.
Revision Number	The revision configuration that you are going to compare the original revision configuration with. If you select Select Revision, a list of the revision configurations appears with the revision number, date and time, user associated with that revision, and a comment.Select one of these revisions. If you select Specify Revision, enter a number for the revision configuration you want to compare with the original revision configuration.

4 Select OK.

A new window appears, containing each configuration revision in a separate columns, with changes highlighted.

- Green highlight: added line
- Yellow highlight: changed line
- Red highlight: deleted line

You can scroll down through the changes, or select a double arrow (<< or >>) located at the top to jump to the exact position of the next or previous change.

Restoring configuration revisions

You can restore a previous configuration to your device by using configuration revisions received by the service.

To restore a configuration revision or script

1 In the FortiGate web-based manager, go to **System > Maintenance > Backup & Restore**.

2 In “Restore configuration from”, select FortiGuard to restore a configuration from the portal web site.

3 Select Browse to locate the configuration revision or script (“template”) to apply.

4 Select Restore.

A success message appears.

```
Settings successfully uploaded. Please wait while the system
restarts.
```

Note: Instead of restoring a previous configuration, you can also apply a configuration script. For more information, see "Scripts" on page 46.

Running scripts

Caution: Verify configuration scripts before deployment. Deploying a configuration script that alters host name, IP address, or the service settings can result in interrupted connectivity.

You can run scripts or schedule when a script runs from the Tasks section of the Device menu. Scripts allow you to deploy identical configuration items to many devices. Scripts are configured from configuration backup files which are then uploaded to the portal web site. For more information about scripts and configuring them, see "Scripts" on page 46.

To run a script

1. Go to **Management > Device > Device Detail**.
2. In the Tasks section, select Run Script.
3. Enter the appropriate information for the following:

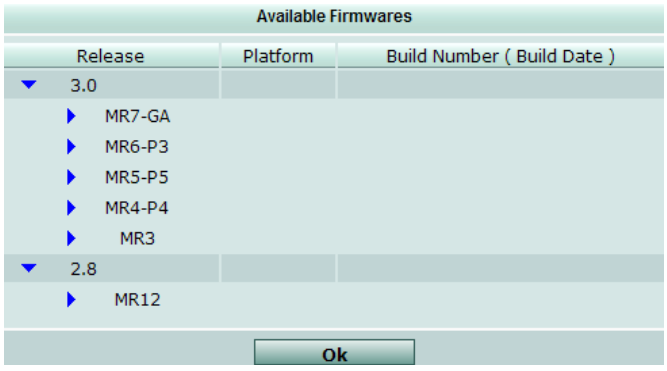
Scheduled Time (GMT:<time_zone>)	Select one of the following: • Time – Enter the time period in the field or use the Calendar icon. The script will run at the specified time you enter. • ASAP – Select to immediately run the script after you select Submit.
Script	Select the name of the script you want to run from the list.

4. Select Submit.

Viewing available firmware images

When you select the Show Applicable Firmware link in Tasks, all available firmware images on the FDN appear. This list includes FortiOS 2.80 firmware and patch releases.

Figure 22: Firmware images (including FortiOS 2.80)



Release	The version numbers of firmware images currently available from the FDN for your authorized devices. Releases towards the top of the list are more recent. Select the Expand Arrows to expand or hide releases within the major or minor version number.
Platform	The device's model type and number. For example, a FortiGate-100 device would have a platform code of FGT-100.
Build Number (Build Date)	The build number of the firmware version, and the date and time that the firmware image was built.

Changing firmware from the portal web site

Caution: Back up the configuration before downgrading. Downgrading the firmware may reset the device to that firmware's default configuration, resulting in configuration loss. This includes the interface IP addresses, as well as HTTP, HTTPS, SSH, and Telnet administrative access. For backup procedures, see the *FortiGate Administration Guide*.

The Device Detail tab displays each device's current firmware version and any scheduled firmware changes.

Authorized, configured devices periodically poll the service. If you have scheduled a firmware change, the device will discover the schedule during this poll, and apply the firmware at the appointed time.

Each device must have a valid firmware update license to download firmware. For high availability (HA) clusters, this includes all units in the cluster, not just the primary unit.

You can view your firmware version and schedule a firmware change from the Tasks section of the Device menu. You can also immediately change the firmware from the device. For more information, see "Changing firmware from the device" on page 45.

Note: Downgrading device firmware to FortiOS 3.0 MR6 or lower removes support for the service.

To schedule a firmware change

1. Go to **Management > Device**.
2. In the Tasks section, select Upgrade Firmware.
3. Select the "Scheduled Time", relative to the device's local time zone, or select "ASAP" (as soon as possible) to change the firmware immediately when the device next polls the service.
4. From "Firmware", select which firmware version to install from the list.
5. Select Submit.

   The firmware change scheduled for the device appears in the Device Firmware tab.

   If you have scheduled an immediate change, it will take effect as soon as possible, when the device next polls the service. Time varies by the speed of your connection and the size of the firmware image.

Changing firmware from the device

Caution: Back up the configuration before downgrading. Downgrading the firmware may reset the device to that firmware's default configuration, resulting in data loss. This includes the interface IP addresses, as well as HTTP, HTTPS, SSH, and Telnet administrative access. For back up procedures, see the *FortiGate Administration Guide*.

In addition to immediately changing a device's firmware from within the portal, you can also immediately change the device's firmware by logging in to the device's web-based manager.

Use the portal web site to schedule when to upgrade the device's firmware image. For more information, see "Changing firmware from the portal web site" on page 44.

Note: The option, Upgrade from FortiGuard network, appears only after the device has validated the service license.

If you downgrade device firmware to FortiOS 3.0 MR6 or lower, support for the service is removed.

To immediately change firmware

1. In the FortiGate web-based manager, go to **System > Status**.
2. In System Information, in Firmware Version, select Update.
3. Select "FortiGuard Network" in Upgrade From list.

   If you want to downgrade the device's firmware, enable Allow firmware downgrade.
4. Select the firmware version.
5. Select OK.

   A status message appears: `Downloading firmware from FortiGuard server, please wait.`
6. If you are downgrading the firmware, after the image is successfully downloaded, another message appears.

   ```
   This operation will downgrade the current firmware version.
   Are you sure you want to continue ?
   ```
7. Select OK.

Scripts

Scripts allow you to deploy identical configuration items to many devices. You can view configured scripts from the Script menu. For example, if all of your devices use identical administrator access profiles, you can create the access profile once as a script, and then deploy the script to all devices which should use those same settings.

The Script tab allows you to upload and deploy configuration scripts.

Creating scripts

With a plain text editor, you can create scripts from backed up configuration files, and then upload them as a script. Alternatively, you can type CLI commands directly into a script in the portal web site.

The following procedure requires a plain text editor.

Note: Configuration files contain CLI commands. For descriptions of CLI commands, see the *FortiGate CLI Reference*.

To create a script from a configuration file

1. Go to **Management > Device > Revision History**.
2. In the revision history list, locate the configuration file that you want to use as the basis for your script.
3. Select Download and save to your computer.
4. On your computer, edit the downloaded configuration file within a plain text editor, removing the settings that you do not want deployed.

   For example, if you want to deploy the script to multiple devices, you might remove device-specific settings, such as host names and interface IP addresses. For settings which are a comma- or space-delimited list, remember to re-type the entire list, not just new list items.
5. Save the configuration file.
6. Go to Script.
7. Select Upload.
8. In the Upload Script dialog box, enter a name for the script.
9. Enter comments that describe the script.
10. Select Browse to locate the script file.
11. Select Submit.

    The script file is uploaded to the script list. Upload time will vary by connection speed and file size.

To create a script by entering CLI commands

1. Go to **Management > Script**.
2. Select Input.
3. In the Script Input dialog box, enter a name for the script.
4. Enter comments that describe the script.
5. In “Script”, type CLI commands exactly as you would type them at the command prompt.

   For example, if you want to deploy the script to multiple devices, you might omit device-specific settings, such as host names and interface IP addresses. For settings which are a comma- or space-delimited list, remember to re-type the entire list, not just new list items.
6. Before submitting the commands, review the script for valid CLI syntax and correct settings.

7 Select Submit.

The script is added to the list of available scripts.

Note: Verify configuration scripts before deployment. Deploying a configuration script that alters host name, IP address, or the service settings can result in interrupted connectivity. For more information about CLI commands, see the *FortiGate CLI Reference*.

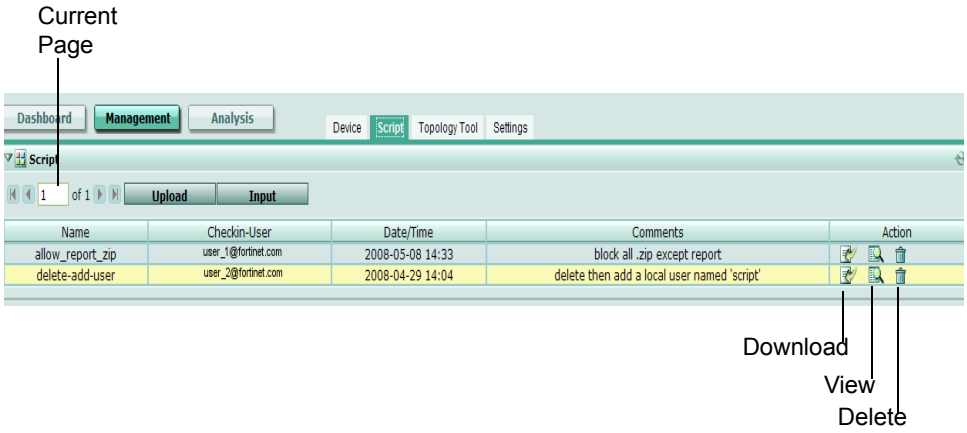
Viewing available configuration scripts

The Script tab displays all configuration scripts that you have uploaded or input, and any deployment schedules for each script.

After entering and uploading the script to the portal web site, scripts can then be scheduled for deployment. For information on creating scripts, see "Creating scripts" on page 46.

To view available configuration scripts, go to **Management > Script**.

Figure 23: Scripts



Current Page	By default, the first page of the list of items is displayed. The total number of pages appears after the current page number. For example, if 3/54 appears, you are currently viewing page 3 of 54 pages. To view pages, select the left and right arrows to display the first, previous, next, or last page. To view a specific page, enter the page number in the field and then press Enter.
Upload	Upload a script file to your computer from the server.
Input	Create a script by typing CLI commands.
Name	The name of a script.
Checkin-User	The name of the user that created the script, either by uploading it from the script list, or submitting it from a FortiGate unit's web-based manager.
Date/Time	The date and time that the script was created.
Comments	Description or comment that the user may have entered when creating the script by selecting Input.
Action	Select Download to download the script to your computer. Select View to view the script. You can also edit the script while viewing it. Select Delete to remove the script. You can also edit scripts while viewing it.

Topology Tool

The Topology Tool tab, similar to the Topology tab found on most devices, allows you to create and save a diagram of your specific network. Multiple network diagrams can also be created and saved on the service's servers, which can then be retrieved whenever needed.

The Topology Tool tab provides all the things you need to create a network diagram, such as Fortinet device icons, connector lines, and text boxes. There are also two modes to select from: View mode displays the network diagram and Edit mode provides what you need to create a network diagram.

Note: The View Mode / Edit Mode button acts as a toggle, so that when you are in one mode, the text displayed indicates that selecting it will switch the display to the other mode. For example, if you are in Edit mode, the text displays "View Mode", indicating that selecting the button will switch you to the View mode.

Figure 24: Network diagram in View mode

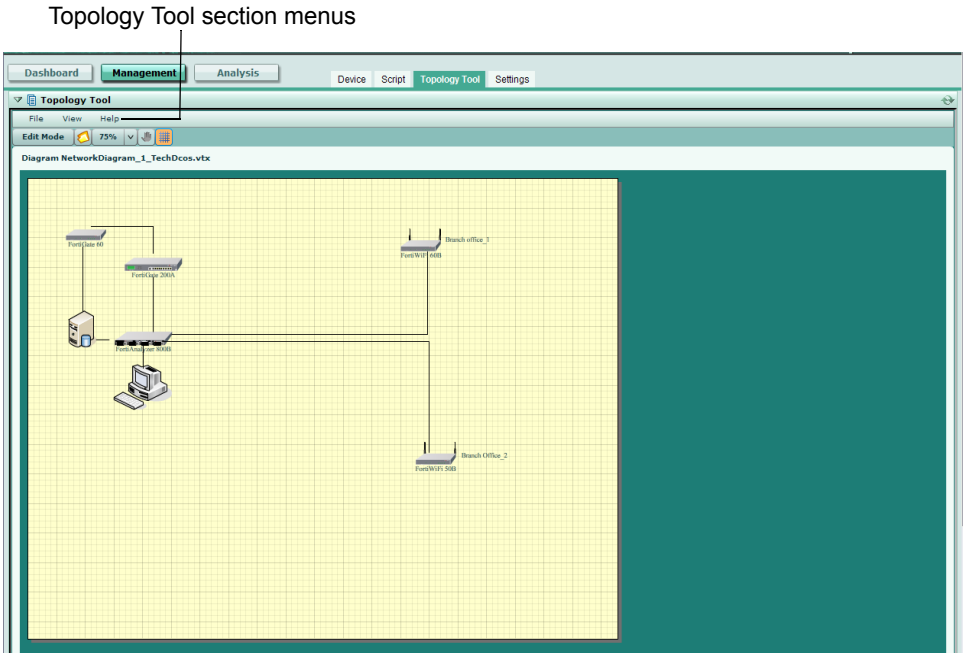
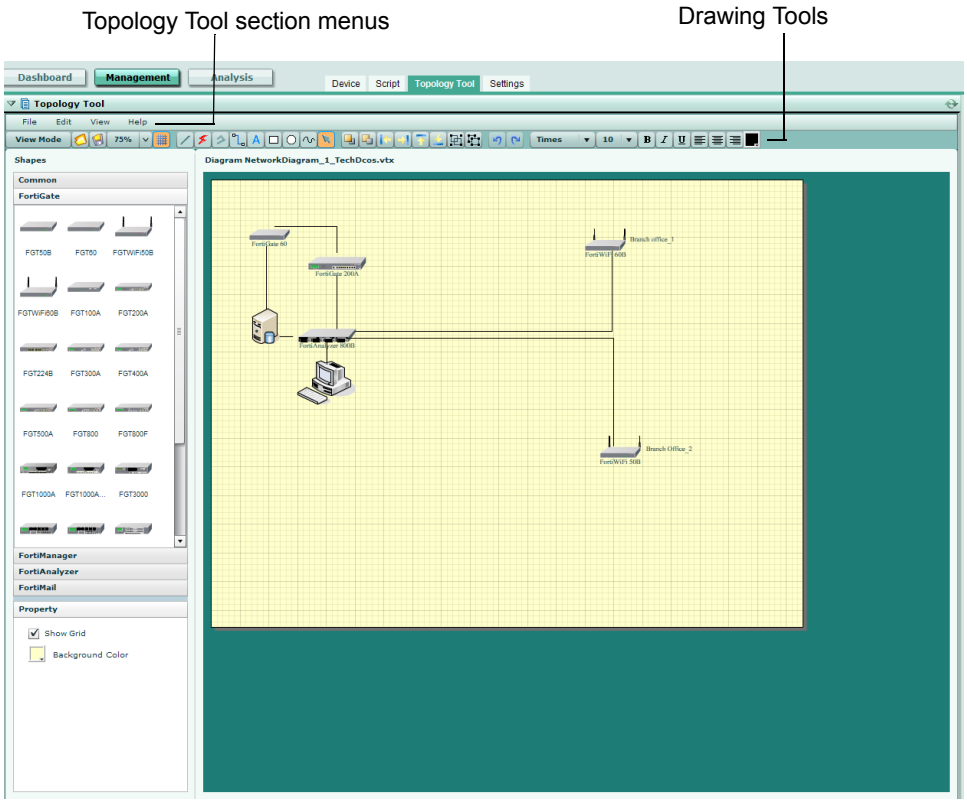


Figure 25: Network diagram in Edit mode



Within the Topology Tool section, additional menus allow you to access network diagrams and customize the view. These additional menus differ between View mode and Edit mode, but you can access them the same way. For example, to open a saved network diagram, go to **File > Open**.

View Mode menus

File Contains the following menus:
- Open
- Close

View Contains the following menus:
- Zoom In
- Zoom Out
- Hide Grid
- Edit Mode

Help Contains the About menu. This displays the firmware version of the Topology Tool.

Edit Mode menus

File	Contains the following menus: • New • Open • Upload • Download • Export • Save • Save as • Close
Edit	Contains the following menus: • Bring to Front • Send to Back • Group • Ungroup • Delete
View	Contains the following menus: • Zoom In • Zoom Out • Hide Grid • Show Mode
Help	Contains the About menu. This displays the firmware version of the Topology Tool.

In Edit mode, many different icons (or drawing tools) and shapes help you create a network diagram. These shapes are available in the Shapes section and are used to show the different Fortinet products that may be incorporated into your network. The drawing tools are available below the Topology Tool menus.

To find out about each drawing tool, use your mouse to view each one's tooltip.

Creating a network diagram

You can create a network diagram easily in the Topology Tool tab using the Edit mode. In Edit mode, you can choose the shapes you want in your diagram, such as Fortinet product icons or computers, and connector lines as well as many other options.

Note: The Edit Mode / View Mode button allows you to switch between the two modes. For example, if the wording on the button is "Edit Mode", this indicates that you are using View Mode and that by selecting the control you will switch to Edit Mode.

To create a network diagram

1. Go to **Management > Topology Tool**.
2. Select Edit Mode to access the drawing tools.
3. Draw the diagram using the available drawing tools and shapes.

4 Select Save to save the network diagram to the service's server.

You can save the network diagram to either the Private or Shared folders. If you save the network diagram to the Private folders, it is accessible only to you. The Shared folder can be accessed by anyone.

Viewing a network diagram

You can view a network diagram when you are in either Edit mode or View mode. When you are in View mode, if you open a network diagram, you can also edit the network diagram using the various icons and shapes.

To view a network diagram

1 Go to **Management > Topology Tool**.

2 If the diagram you want to view is not already displayed, select **File > Open**.

3 In Browse File, locate the file and select Open.

•

Settings

The Settings tab allows you to configure service account information, and to define alert profiles, contract numbers, and users associated with the service.

This topic includes:

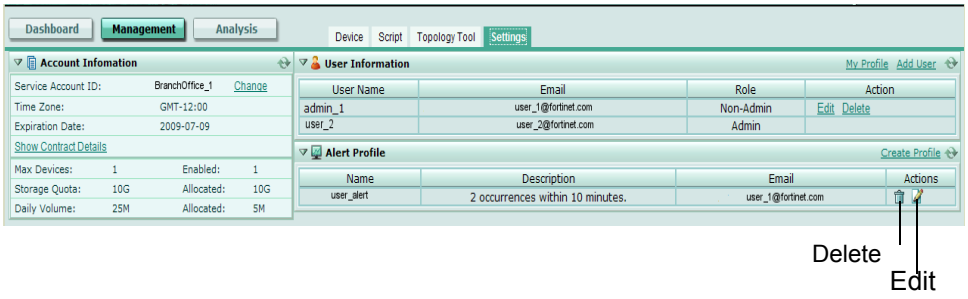
Viewing service account information

The Settings tab includes information on your Service Account ID and users, as well as service contract information that applies to that service account. You can also configure alert profiles in Alert Profile.

You can move Account Information, User Information, and Alert Profile around to rearrange the default arrangement. Use your mouse to arrange the order of these sections within Settings. When you arrange these sections, they are not saved in your specific arrangement, even when you log out of the portal web site.

To view service account information, go to **Management > Settings**.

Figure 26: Settings menu



Account Information

This section provides information specific to your account, such as the service account ID, the time zone, and other details about your contract.

Service Account ID The identifier you created during either a trial contract or when you purchased a contract, and used when configuring a device to use the service.

Time Zone The time zone that you associated with your service account when creating your contract, either through the portal web site or the Fortinet Technical Support web site.

Expiration Date The date the service contract expires.

Show Contract Details Display the details of your service contract including the contract serial number.

- **SN** The serial number of the contract you purchased.
- **Expiration Date** The date the service contract expires.
- **Quota** The maximum amount of disk space that you can allocate to devices using the service.
- **Daily Volume** The maximum amount of disk space that a device is using with the service.
- **Description** The comment you included when registering.

Max Devices The maximum number of devices licensed to use the service simultaneously under this Service Account ID.

Enabled The number of devices currently authorized to use the service with the Service Account ID.

Storage Quota The maximum amount of disk space, in gigabytes, that you can allocate to devices using the service.

Allocated The total amount of the devices' individual quotas in gigabytes.

Daily Volume The maximum amount of disk space that a device using the service can consume per day. This must be less than or equal to the Quota.

Allocated The amount of daily volume currently consumable per day by devices using the service; a total of their individual daily quotas.

User Information

This section provides information concerning users and their administration roles. You can also add administrators.

	My Profile	Display the admin user's profile information, such as email address and security questions. The admin user is the default user of the service contract and has read and write privileges, similar to the admin administrator on a device. This user can only edit My Profile; the admin user cannot delete his or her own profile.
	Add User	Add a portal user login. For more information, see "Adding, editing and removing administrators" on page 52.
	User Name	The name of the user that has access to the portal web site. This is usually the person's first and last name. Use the email address of the user to log in to the portal web site.
	Email	The email address used when logging in to the portal.
	Role	The specified role of the user. The roles for users are: **Admin** – read and write privileges **Non-Admin** – read privileges only **e-Discovery** – access to only the e-Discovery menu.
	Action	Select Delete to remove a user from the list. Select Edit to change the user's information. These actions do not appear next to your own account. If you want to edit this account, see "Editing your login profile" on page 53.
Alert Profile	Use this section to view and configure alert profiles. For more information, see "Configuring an alert profile" on page 55.	
	Create Profile	Add a new alert profile.
	Name	The name of the alert profile.
	Description	The number of occurrences and the time frame that they occur in.
	Email	The email address of the receiver of an alert profile.
	Actions	Select Delete to remove an alert profile. Select Edit to change an alert profile.

Note: In high availability (HA) clusters, daily quota that is assigned in HA clusters will be added up for each member transparently on the FortiOS side; however, at the same time, the current volume on each member is also counted together by the primary unit.

Adding, editing and removing administrators

If multiple users will be accessing the service portal, you can add those users to the account from the User Information area.

User roles define access privileges, and can be Non-Admin (read-only permissions), Admin (full permissions), or e-Discovery (read and write permissions for the e-Discovery menu).

Email addresses should be kept current. A user can retrieve a forgotten password by entering the email address configured for his or her account. If the email address is no longer functional, the user will not be able to retrieve the password, and an Admin role user must instead delete and recreate the user account.

From the Settings menu, an Admin user can update the user's email address, user name, or role but not passwords or security questions. The user must update his or her own password and security questions by selecting Edit.

To add or edit account users

1 Go to **Management > Settings**.

2 In User Information, select either Add User to create a new user, or select the Edit icon in the row of the user you want to change.

3 Enter the following information:

User Name	Enter or change the name of the user.
Password	Enter or change the password for the user.
Re-type Password	Re-enter the password to confirm its spelling.
Email	Enter the user's email address. Users log in to the portal using their email address.
Re-type Email	Re-enter the email address to confirm its spelling.
Role	Select one of the following: • Admin - to provide full access to all features • Non-Admin - to provide read-only access to everything except Edit Profile, which is read-write • e-Discovery - to provide read and write access to only the e-Discovery menu.

4 Select Submit.

Note: The Edit action does not appear in the row listing the admin user's account. User accounts cannot change their own role. If you want to edit user profiles, see "Editing your login profile" on page 53.

To remove a user account

1 Go to **Management > Settings**.

2 In User Information, select Delete in the Action column.

3 Select OK.

Note: The Delete action does not appear in the row for the admin user account. Admin user accounts cannot delete themselves.

Editing your login profile

When logged in to the service portal, you can edit your account profile to update your email address, password, security questions or name. Each user has access to his or her own personal profile.

Users can modify only their own password and security questions, even if their role is Admin.

To edit your profile

1 Go to **Management > Settings**.

2 In User Information, select My Profile.

3 Enter the new information for the following:

Service Account ID	The service account identification name for the account. The service account ID cannot be edited in My Profile. See “Changing your service account ID” on page 54 to change your service account ID.
User Name	Enter your name. Do not include spaces or special characters.
Email	Enter a new email address.
Re-type Email	Re-enter the email address to confirm its spelling.
Password	Enter a new password.
Re-type Password	Re-enter the password to confirm its spelling.
Security Question 1	Enter a challenge that can be used to verify your identity in the event that you forget your password and need to retrieve it.
Your Answer	Enter an answer for Security Question 1.
Security Question 2	Enter a second challenge that can be used to verify your identity in the event that you forget your password and need to retrieve it.
Your Answer	Enter an answer for Security Question 2.

4 Select Submit.

Changing your service account ID

The Account Information area includes the Service Account ID and time zone, and is displayed the same way for all users and devices connecting to the account.

The Service Account ID is required for configuring a device to connect to the service. For more information, see “Obtaining a trial contract” on page 14.

Account Information also includes usage statistics for your service contracts, such as the contract’s expiration date, number of authorized devices, and disk quotas. For more information, see “Viewing service account information” on page 50.

To change the Service Account ID

1 Go to **Management > Settings**.

2 In Account Information, beside Service Account ID, select Change.

3 Enter the new Service Account ID without special characters or spaces.

4 Select Submit.

A success message appears.

5 Select OK.

Configuring an alert profile

You can configure an alert profile within the Settings page. Alert profiles provide notification of when a specified threshold has been reached by sending an email message to the specified email address. You can add multiple alert profiles from the Alert Profile section in the Settings page.

To configure an alert profile

1 Go to **Management > Settings**.

2 In Alert Profile, select Create Profile.

3 Enter the appropriate information for the following:

Name	Enter a name for the alert profile.
When [<nn>] occurrences within [<nn_min_hr>]	Select a number from the first list to specify the number of alerts that must occur before an email notification is sent to the specified email address. Select a number from the second list to specify when alert notification email will be sent if that number of alerts is reached. If you select Specify (min), you can enter the specific minutes in a third field.
Send to	Enter an email address that will receive the alert profile's notification message.
Message	Enter a message for the body of the email.

4 Select OK.

Analysis

In the Analysis menu, you can view, search and browse through log files of each registered device. You can also view and generate reports. The Analysis menu also includes the e-Discovery tab, which allows you to search for email messages.

The FortiGuard Analysis server can store all log files, such as content logs and traffic logs. This server is a device that stores log files, similar to a FortiAnalyzer unit or Syslog server.

Reports are automatically provided for each device and can be generated from the Report tab. Generated reports are provided as PDF files. Reports display the gathered log data in bar and pie graphs within the PDF file.

Reports help you to:

- view network usage and patterns to make informed decisions
- discover and address vulnerabilities across dispersed device installations
- minimize the effort required to identify attack patterns when customizing policies to prevent attacks
- monitor Internet surfing patterns for compliance with your company policy
- identify your web site visitors for potential customers.

The e-Discovery tab allows you to configure a detailed search for specific email messages. The e-Discovery tab also provides access for third-party users, who have the e-Discovery role profile, to view specific email messages and to search for specific email messages

This section includes the following topics:

Note: DST is now extended by four weeks in the United States and Canada and may affect your location. It is recommended to verify if your location observes this change, since it affects the scope of the report. Fortinet has released supporting firmware. For more information, see the Fortinet Knowledge Center article, New Daylight Saving Time support.

In previous firmware releases of the service, the feature IP alias was available. In FortiGuard Analysis and Management Service 1.2.0, the IP alias is no longer available.

Log Viewer

From the Log Viewer tab, you can view recent and specific logs on the registered devices. There are two types of log viewing options:

- Recent – displays current log messages, as they are received by the service.
- Specific – provides a method of viewing historical log messages by focusing on specific log types and time frames.

FortiGate log messages present detailed accounts of an event or activity that occurred on your network. These log messages provide valuable information about your network, informing you about attacks, misuse and abuse.

The *FortiGate Logging in FortiOS 3.0 Technical Note* provides detailed information about all log messages and is available from the Fortinet Knowledge Center web site.

You can search both recent and historical log messages when viewing them in either Recent or Specified, by using Type, Level, or Column Settings.

Viewing logs

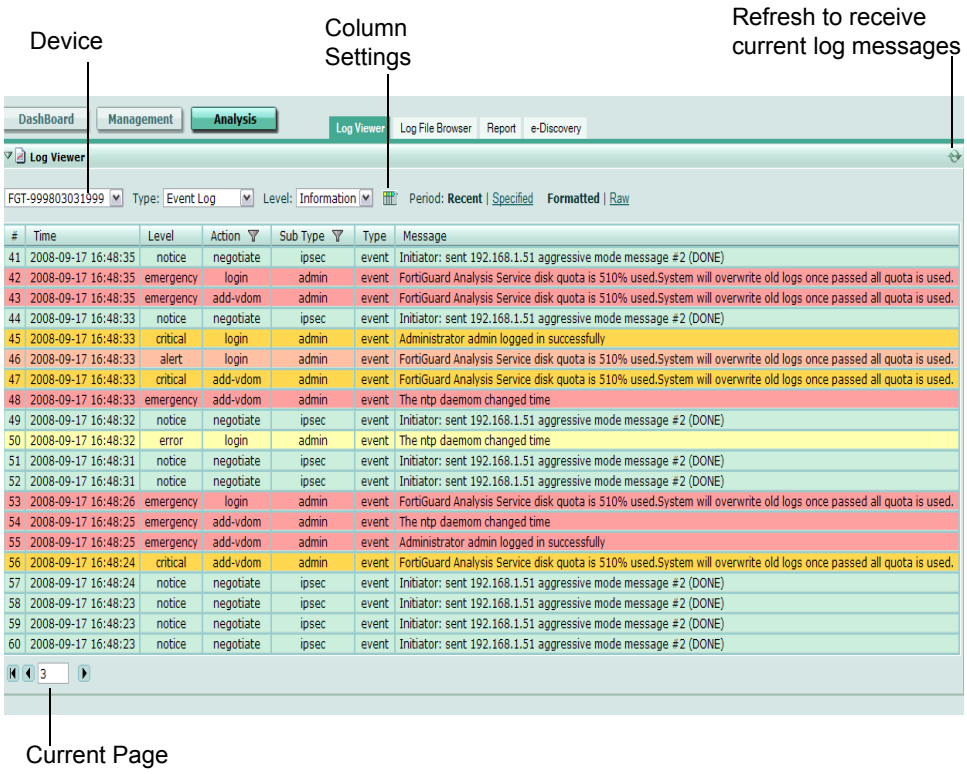
From the Log Viewer, you can view recent log messages as they are received by the service from a device. Recent log messages provide current information about what is happening on your network in real-time.

From the same page, you can also view historical log messages by specifying when these log messages occurred. For example, you can view logs that occurred between July 2, 2008 and September 15, 2008.

To view recent logs, go to **Analysis > Log Viewer**. Recent log messages appear by default in the Log Viewer section. To view the most current recent logs, select the Refresh icon.

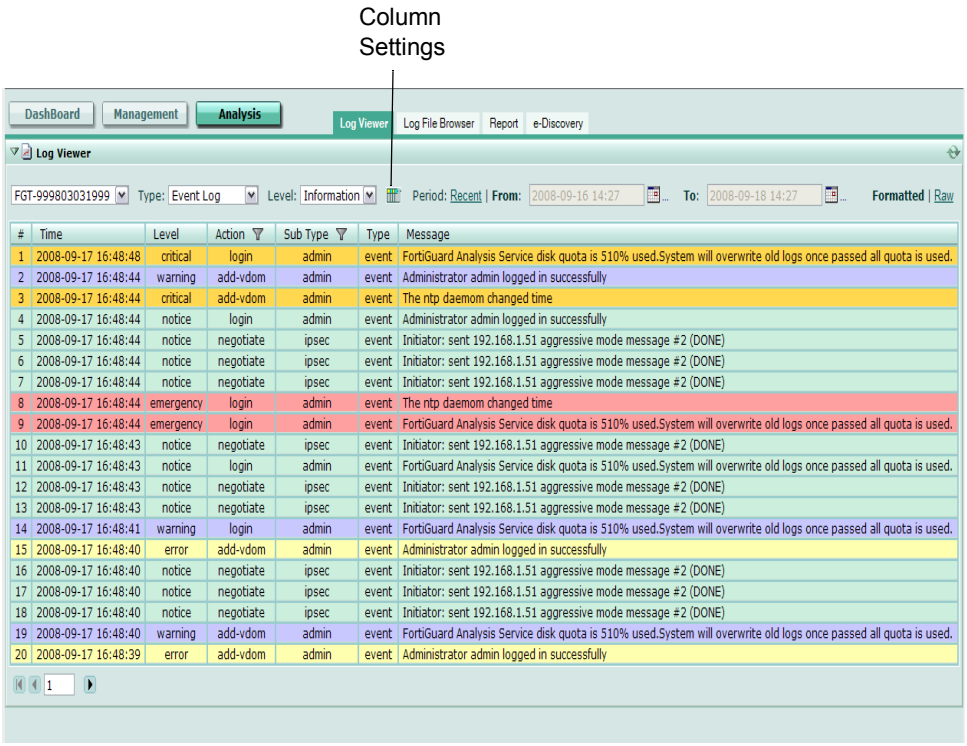
To view historical logs, go to **Analysis > Log Viewer**. Select the calendar beside Period: From and select a start date and time; select the other calendar, beside Period: To, and then select an end date and time.

Figure 27: Viewing recent event log messages



Device	The device that you are currently viewing log messages from.
Type	The type of log messages you are currently viewing. For example, if Event Log is selected, all event log messages appear.
Level	The log severity level. You can use this to filter log messages. For example, selecting Information displays all log messages that contain only the log severity level Information. For more information about log severity levels, see "Configuring remote logging and central management" on page 17.
Column Settings icon	Select to add or remove columns. This changes what log information appears within Log Viewer. For more information, see "Customizing the log column views" on page 61.
Period: Recent | Specified	By default, Recent appears. Recent displays all current log messages that are occurring in real-time on the selected device. Specified displays all historical log messages. When you select Specified, the fields **From** and **To** appear, with calendars. Select the calendar to specify the dates to view historical log messages on those dates.
Formatted | Raw	By default, log messages are displayed in Formatted mode. Select Raw mode to view logs as they would appear within the log file, without columns.
Current Page	By default, the first page of the list of items is displayed. The total number of pages displays after the current page number. For example, if 3/54 appears, you are currently viewing page 3 of 54 pages. To view pages, select the left and right arrows to display the first, previous, next, or last page. To view a specific page, enter the page number in the field and then press Enter.

Figure 28: Viewing historical event log messages



Customizing the log view

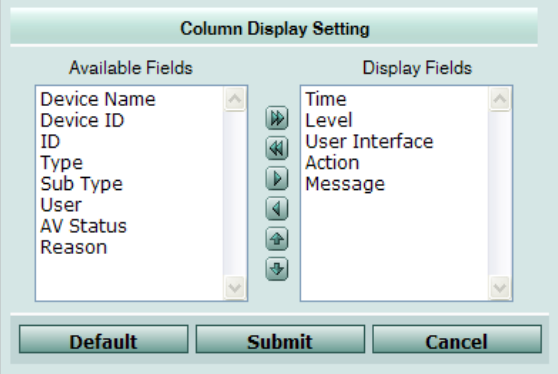
The service allows you to customize what columns and log information are displayed when viewing logs, providing another way to find specific log information.

Customizing the log column views

You can customize log columns to display only the information you want to view. You can add, remove and change the position of each column from the Column Display Settings window. This window appears after you select the Column Settings icon. Each Column Display Settings window contains the fields associated with the log file you are currently viewing. For example, the event log contains the AV Status field, but the traffic log contains no AV Status, just Status.

Customizing the display of log columns is available only in Formatted view. The following procedures assume that you are currently viewing a log file list in **Analysis > Log Viewer**, and that you want to customize the view.

Figure 29: Column Display Settings window for Event log



To show or hide columns

1 Select Column Settings.

A list of columns available for that log type appears.

2 Select columns that you want displayed or hidden by doing one of the following:

- Select a column name in the Available Fields area to add or remove a single column, then select a single arrow to move the column to the Display Fields area.
- Select the double arrow to add or remove all columns.
- Select Default to return all columns to their default displayed/hidden status.

3 Select Submit.

You can revert to the default column settings by selecting Default.

To change the order of the columns

1 Select Column Settings.

A list of columns available for the log type appears.

2 Select a column name.

3 Select the up or down arrows to change the position of the column in the list.

4 Repeat steps 2 and 3 until all columns are re-arranged in the order you want.

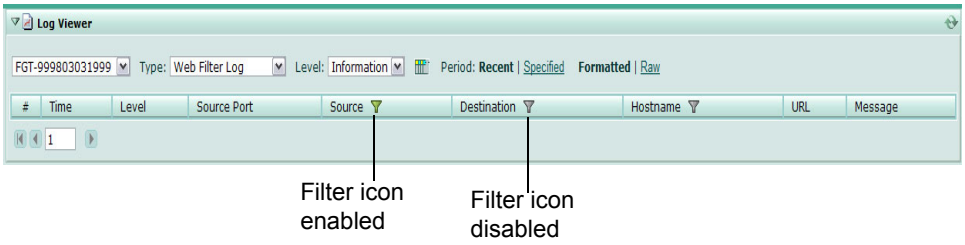
5 Select Submit.

Filtering logs

You can filter log messages by using the filter icon to find specific content when viewing them in the Log Viewer tab. Log filters appear for certain columns only.

The filter setting is disabled by default and displays the filter icon in gray. When enabled, the filter icon appears green.

Figure 30: Filter icons for logs



When filtering by source or destination IP, you can use the following in the filtering criteria:

- a single address (`2.2.2.2`)
- an address range using a wild card (`1.2.2.*`)
- an address range (`1.2.2.1-1.2.2.100`)

You can also use a Boolean operator (“or”) to indicate mutually exclusive choices:

- `1.1.1.1 or 2.2.2.2`
- `1.1.1.1 or 2.2.2.*`
- `1.1.1.1 or 2.2.2.1-2.2.2.10`

To filter logs

1. Go to **Analysis > Log Viewer**.
2. Select a log type to view log messages from.
3. Go to a column in the log type.
4. Select the filter icon in that column’s heading.
5. Using the arrows, move the appropriate keywords from Available Fields to Display Fields.
6. Select Submit.

To clear log filters

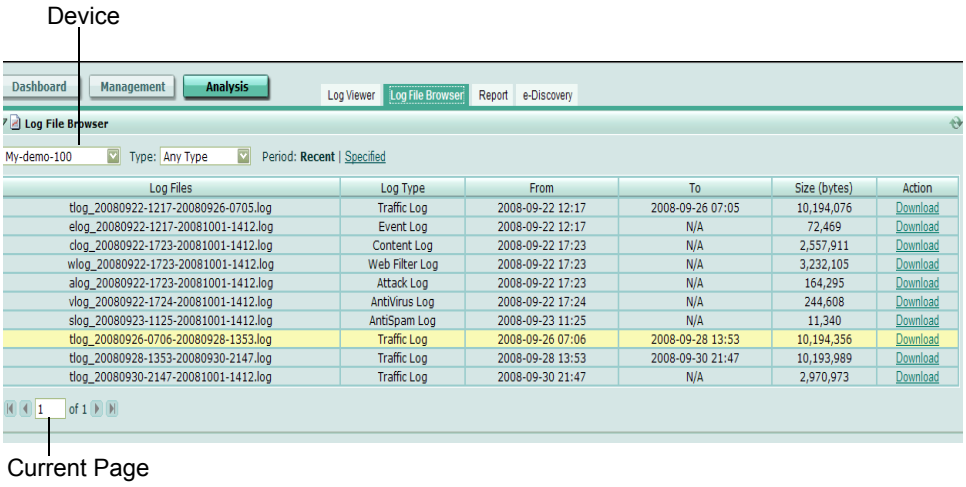
1. Go to **Analysis > Log Viewer**.
2. Select the log type that contains the column filter that you want to clear.
3. Go to the column.
4. Select the filter icon in that column’s heading.
5. Using the double arrows, move the keywords from Display Fields to Available Fields.
6. Select Submit.
7. Repeat steps 2 to 6 for each filter.

Log File Browser

You can download all log files stored on each device. By downloading the log files, you can view all log messages that were recorded in that log file outside of the portal web site. When you download a log file, it is saved as a plain text file. You can view the downloaded file in any plain text editor, such as Notepad.

To view and download log files, go to **Analysis > Log File Browser**.

Figure 31: Browsing log files in Analysis > Log File Browser



Device	The device that you are currently viewing log messages from.
Type	The type of log messages you are currently viewing. For example, if Event Log is selected, all event log messages display.
Period: Recent | Specified	By default, Recent appears. Recent displays all current log messages that are occurring in real-time on the selected device. Specified displays all historical log messages. When you select Specified, the fields **From** and **To** appear, with calendars. Select the calendar to specify the dates to view historical log messages on those dates.
Log Files	The name of the log file you are currently viewing. This name is in the format: `<log_name>_yyyymmdd-hhmm_yyyymmdd-hhmm.log`. For example, elog_20080915-1455_20080915-1508.log means that this log file is an event log file and was created on September 15, 2008 at 2:55 pm and stopped on the same day at 3:08 pm.
Log Type	The type of log file you are currently viewing.
From	The date that the log file started collecting log messages.
To	The date that the log file stopped collecting log messages.
Size (bytes)	The size of the log file, in bytes.
Action	Download the log type to your management computer. You can only view log files if they are downloaded to a computer.
Current Page	By default, the first page of the list of items is displayed. The total number of pages displays after the current page number. For example, if 3/54 appears, you are currently viewing page 3 of 54 pages. To view pages, select the left and right arrows to display the first, previous, next, or last page. To view a specific page, enter the page number in the field and then press Enter.

To download a log file

1 Go to **Analysis > Log File Browser**.

2 In the row containing the file you want to download, select Download.

3 After the log file downloads to your computer, open the log file.

For more information about log messages, see the *FortiGate Log Message Reference*.

Deleting log files from the FortiGate web-based manager

You may need to delete logs to remove them from a report or to provide additional space on the FortiGuard Analysis server. You can delete log files from either the FortiGate web-based manager in **System > Maintenance > FortiGuard** or from the portal web site.

Before deleting logs, you should back up log files by downloading them directly from the FortiGuard Analysis server to ensure that the log files remain available if needed.

Deleting log files from the FortiGate web-based manager does not permanently remove them from the FortiGuard Analysis server. Log files that are deleted from the FortiGate web-based manager will not be included in the report.

To delete any log files older than *n* months

1 In the FortiGate web-based manager, go to **System > Maintenance > FortiGuard**.

2 Select the Expand Arrow beside Analysis & Management Service Options to reveal the available options.

3 Select the number of months from the list.

4 Select the link: To purge logs older than *n* month(s) now, please click here.

5 Select OK.

Reports

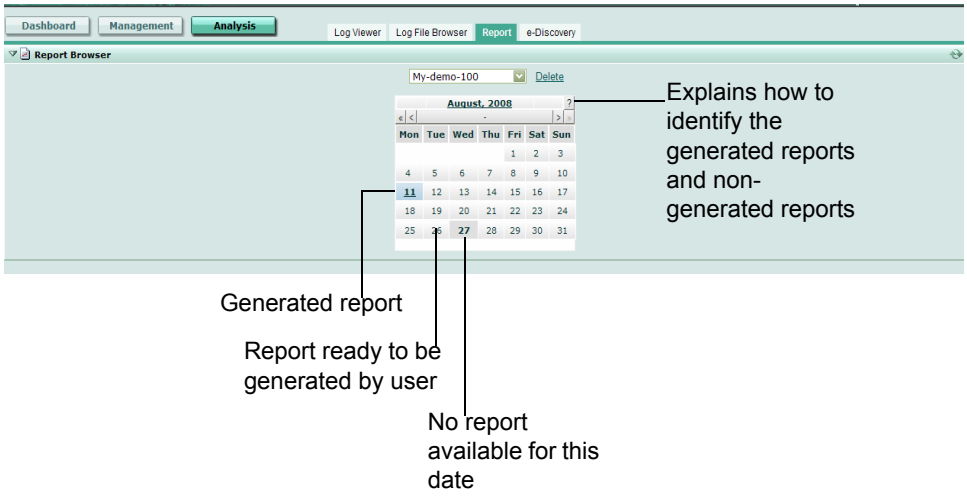
Reports provide an easier way for you to understand what is happening on your network without having to search through numerous log messages. Reports gather log information and put it into a graphical format, providing a quick and easy way to understand what is happening on your network.

Reports can help you in the following ways:

- minimize the effort required to identify attack patterns when customizing policies to prevent attacks
- monitor Internet surfing patterns for compliance with company policy
- identify your web site visitors for potential customers.

You can access reports on the portal web site either from the Dashboard menu or from **Analysis > Report**. The FortiGuard Analysis server provides reports for each device, and can generate the reports whenever you need them. You can save reports to your computer if you want to view them outside of the portal web site.

Figure 32: Reports

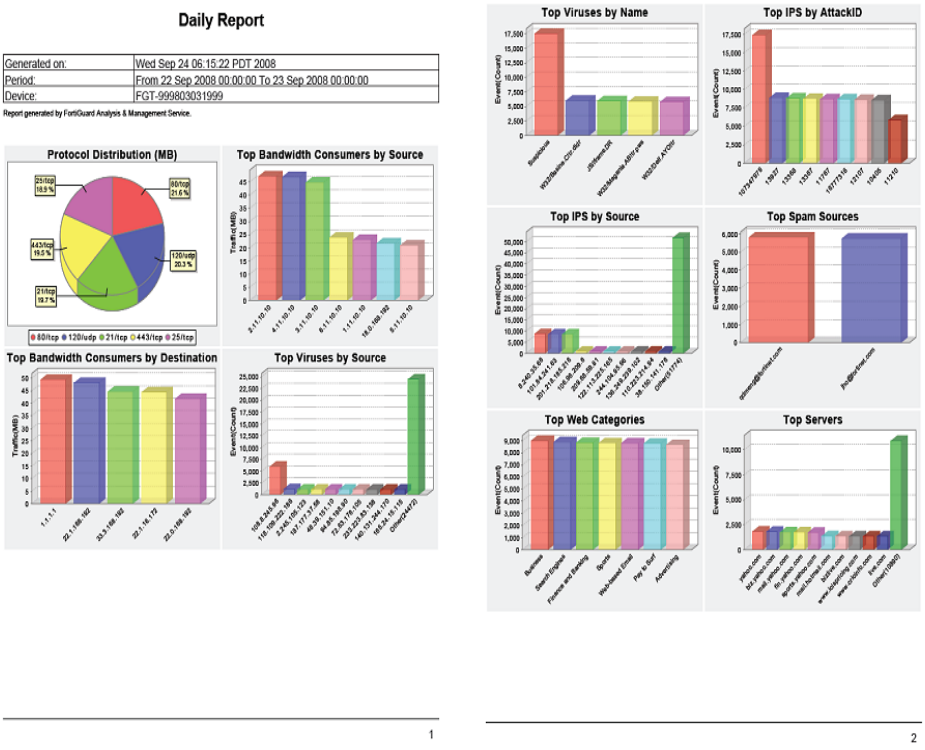


Viewing generated reports

After a report is automatically configured and generated by the FortiGuard Analysis server, you can view that report from the Reports tab.

The FortiGuard Analysis server configures reports for each registered device.

Figure 33: Generated daily report for the period of September 22, 2008 to September 23, 2008



To view a generated report

1. Go to **Analysis > Report**.
2. From the calendar, select the date that the report was generated on.

   A PDF of the report appears.
3. If you want to view this report outside the portal web site, save the report to your computer.

Deleting reports

Deleting reports provides more space on the FortiGuard Analysis server for current reports. Fortinet recommends that you save the report before deleting it, to ensure you have the report should you require it afterward. You must specify when the reports were generated before deleting them. For example, if you specify reports from August 31 to September 22, all reports within this time period are deleted as well. If you want to delete one report, repeat the time period (for example, September 22 to September 22), to delete the report that was generated on September 22.

To delete a report

1. Go to **Analysis > Report**.
2. Select the device from the list.
3. Select Delete.

4 Select the dates using the calendars in Delete Reports.

When selecting dates, remember that reports within the time period will be deleted as well. For example, if you select September 1 to September 5, the reports generated on September 2, 3, and 4 will also be deleted.

5 Select Submit.

e-Discovery

The e-Discovery tab allows third-party administrators to search through email messages, view what searches are taking place, or create new searches. These searches are referred to as tasks. Users with the e-Discovery administrator role can also view these tasks or create new ones.

The following topics are included in this section:

- Viewing e-Discovery tasks
- Creating tasks for e-Discovery

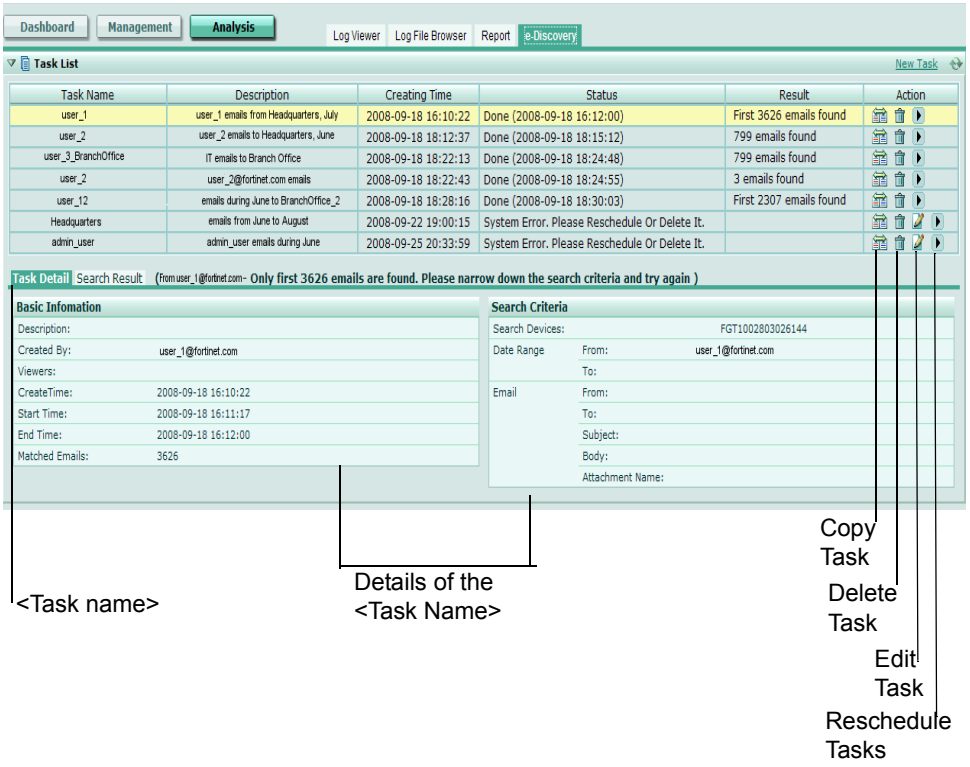
Viewing e-Discovery tasks

You can view e-Discovery tasks from the Tasks section of e-Discovery. If users have the e-Discovery administrator role, this is the only menu that is accessible to them.

When you select a task from the Task List section and then select the Task Detail tab, details about the task display in the Basic Information section, such as who created the task, the start and end times, and who is allowed to view the task. The Search Criteria section displays information about the search, such as the email address for the receiver and sender, device, and time period.

To view the e-Discovery tasks, go to **Analysis > e-Discovery**.

Figure 34: An e-Discovery task in the e-Discovery menu



Task List This section displays the current tasks. You can create tasks by selecting New Tasks.

- **Task Name** The name of the configured task.
- **Description** The description given to the task.
- **Creating Time** The time the task was created, in the format `yyyy-mm-dd hh:mm:ss`.
- **Status** The status of the task and, if completed, the time it was completed. The format of the time is `yyyy-mm-dd hh:mm:ss`.
- **Result** The results of the search. For example, if you are searching for a group of specific email messages, the Result column would indicate how many email messages contain the specific search criteria.
- **Action** Select Copy Task to copy the information in that task and make it the basis for a new task.
  Select Delete to delete the task.
  Select Edit to edit the information in the task.
  Select Reschedule Task to reschedule the task.

<Task Name> This section provides detailed information about the configured task, such as who created the task and the criteria of the email message search. The display name beside the Task Detail and Search Result tabs corresponds to the selected task's name.

- **Basic Information** This section provides detailed information about the task.
  - **Description** The name of the task.
  - **Created By** The user who configured the task, in the format, user_name@example.com.

Viewers	The users who have permission to view the task. For example, if the “no admin” role was selected, the users who have the “no admin” role as access profile can view it.
Create Time	The time the user configured the task, in the format `yyyy-mm-dd hh:mm:ss`.
Start Time	The time the search began.
End Time	The time the search ended.
<Description>	The description of the task that the user entered when configuring the task.

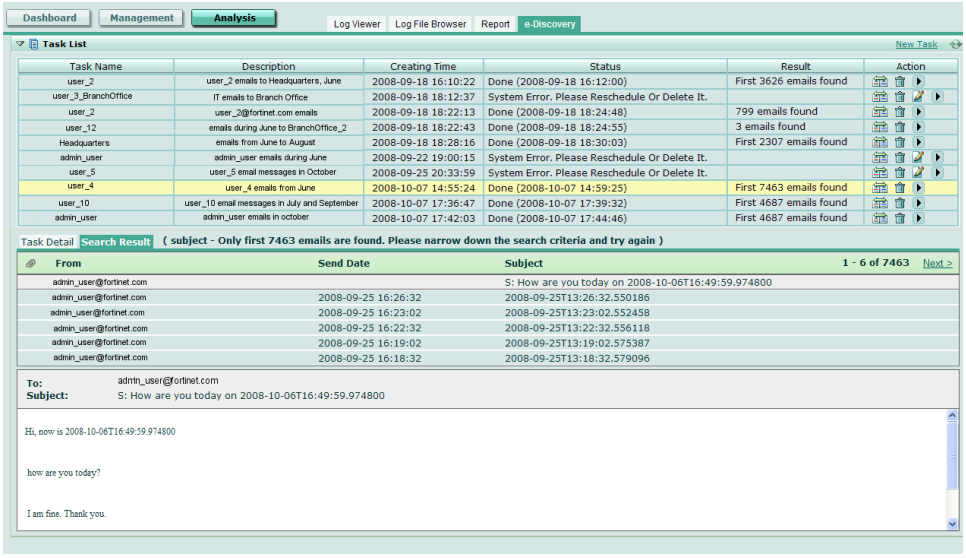
Search Criteria This section provides detailed information about the search criteria, including the attachment name.

Search Devices	The devices that will be searched for the email message. There can be multiple devices.
Date Range	The time period of the search.
Email	The information that is contained in the email message, such as the subject line, words within the body of the email message, and attachment name, if applicable.

Matched Number	The number of matches found that contain some or all of the criteria.
From	The sender’s email address.
To	The receiver’s email address.
Subject	The subject line of the email message.
Body	The words included in the body of the email message.
Attachment Name	The attachment name, if applicable.

Search Results This tab provides all the email messages that were found during the search. The tab also shows whether or not the email message contains an attachment.

Figure 35: Search Results tab with email messages found during the search



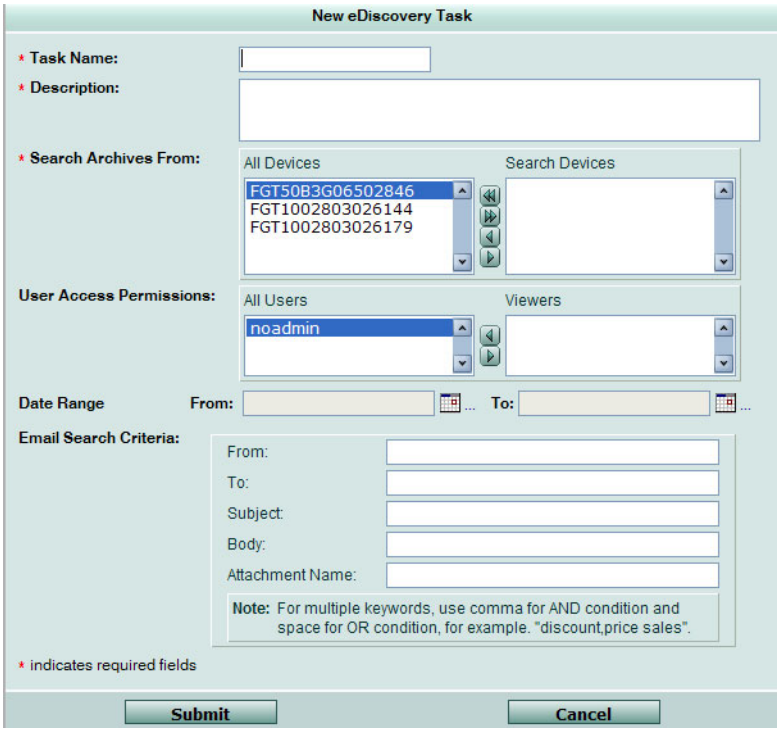
Creating tasks for e-Discovery

You can create detailed tasks for both users and third-party administrators to view. You can also copy an existing task to form the basis of a new task.

The following procedures describe how to create a task, copy a task to use as the basis for a new task, and how to delete a task.

To view the task settings for e-Discovery, go to **Analysis > e-Discovery**. Select the New Task link, complete the tasks described below and select Submit.

Figure 36: e-Discovery task configuration settings



Task	Enter a name for the task.	
Description	Enter a description for this task.	
Search Archives From:	Select a device or multiple devices. The archived email you specify in this task will be searched on only the selected devices.	
	All Devices	Displays all the devices that can be searched for archives. Select one, multiple, or all devices using the arrows.
	Search Devices	Displays all the devices that are chosen for searching archives. If you want to remove a device, multiple devices, or all devices, use the arrows.
User Access Permissions:	The users that the super administrator wants to allow other administrators permission to view these tasks.	
	All Users	Displays all the users that have access to the portal web site.
	Viewers	The administrators that will be allowed to view the tasks. If you want to remove a user, multiple users, or all users, select the user or users and move them using the arrows.

Date Range	The time period for the archived email messages that you want to search.	
	From	Select the calendar icon and then select the start date.
	To	Select the calendar icon and then select the end date.
Email Search Criteria	Enter the appropriate criteria for the search using the following:	
	From	Enter the email address or addresses of the sender or senders. Use a comma to separate multiple email addresses.
	To	Enter the address or addresses of the receiver or receivers. Use a comma to separate multiple email addresses.
	Subject	Enter the subject line of the email message or messages. If there is a common keyword in the subject line of the emails you are looking for, enter the keyword.
	Body	Enter the keywords of the body of the email message or messages.
	Attachment Name	Enter the names of any attachments that came with the email message or messages.

To create tasks for e-Discovery

1. Go to **Analysis > e-Discovery**.
2. In Tasks, select New Task.
3. Enter the appropriate information in the available fields.
4. Select Submit.

To copy a task and apply it to a new task

1. Go to **Analysis > e-Discovery**.
2. In Tasks, select Copy Task in the Action column.
3. Change the appropriate information for the new task.
4. Select Submit.

To delete a task

1. Go to **Analysis > e-Discovery**.
2. In Tasks, select Delete Task in the Action column.

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