



Configuring the SmartFilter Control List

This chapter provides information about configuring the SmartFilter Control List and the items directly related to it. This chapter contains the following topics:

- [Tailoring the SmartFilter Control List, page 6-1](#)
- [Requesting Changes to the Control List, page 6-2](#)
- [Scheduling Control List Downloads, page 6-2](#)
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- [Defining Custom Sites, page 6-7](#)
- [Trimming Custom Sites, page 6-11](#)

Tailoring the SmartFilter Control List

The intent of the SmartFilter Control List is not to categorize every available URL on the Internet. Instead, it focuses on categorizing those Internet sites that are considered unproductive or inappropriate for typical business or educational environments. The 30 predefined SmartFilter Control List categories encompass a wide variety of material.

Some categories are focused on reducing legal liability. These categories are set to “Deny” in the default SmartFilter software policy, such as the gambling, drugs, and sex categories. Some categories contain “bandwidth hogs,” such as MP3 sites. The remainder of these categories are considered unproductive or inappropriate for business or educational environments, such as the dating, job search, and travel categories.

With SmartFilter software, you can easily tailor user access to the Internet to fit your organization’s unique culture and objectives. Pick and choose the categories you want to filter, coach, delay, or allow. From denying access to gambling sites and pornography to allowing access to travel sites during lunch hours, and delaying downloads from MP3 sites, SmartFilter software gives you flexibility and control.

SmartFilter software also provides ten user-defined categories that permit you to further tailor access by defining and filtering sites not included in the SmartFilter Control List. Additionally, you can exempt any site that you would like specific groups or individuals to access quickly and easily.

Secure Computing uses automated tools to continuously search the Internet for new sites and pages that meet the content criteria for the 30 predefined Control List categories. Candidate sites are presented to Secure Computing Control List technicians for personal review. As a rule, sites are not added to the Control List without first being viewed and approved by Secure Computing Control List technicians.

Secure Computing Corporation cannot guarantee it has identified every potential site in a given category. Because identifying a particular site as belonging to a particular category involves judgment and opinion, the Control List that is provided may not include sites that a particular organization may wish to control.

Requesting Changes to the Control List

If you have a question about or want to request a change to a particular URL, you can perform one of these tasks:

- Add or exempt URLs.
 - You can restrict access to sites that are not included the SmartFilter Control List supplied by Secure Computing by configuring the custom sites listed in the Custom Site window of the SmartFilter Administration Console. See the [“Defining Custom Sites” section on page 6-7](#).
 - Exempt a URL in a Secure Computing-defined category from being treated with the same policy as the rest of the category. See the [“Exempting a URL” section on page 6-10](#).
- Send an e-mail to Secure Computing.

Send an e-mail with the URL or the entire site to sites@smartfilter.com. Mail sent to this address receives a response describing the action taken by Secure Computing on the URL or site.
- Check categorization.

Use the SmartFilterWhere tool from our Web page (www.smartfilterwhere.com) to check categorizations and suggest changes. You can check up to three URLs at a time.

Scheduling Control List Downloads

The Download Setup window, shown in [Figure 6-1](#), configures the SmartFilter Control List download schedule. It keeps track of the download site, your username, and your password.



Note

If you do not download an updated SmartFilter Control List at least monthly, the SmartFilter software considers the Control List “expired” and invokes the action that you configured in the License window.



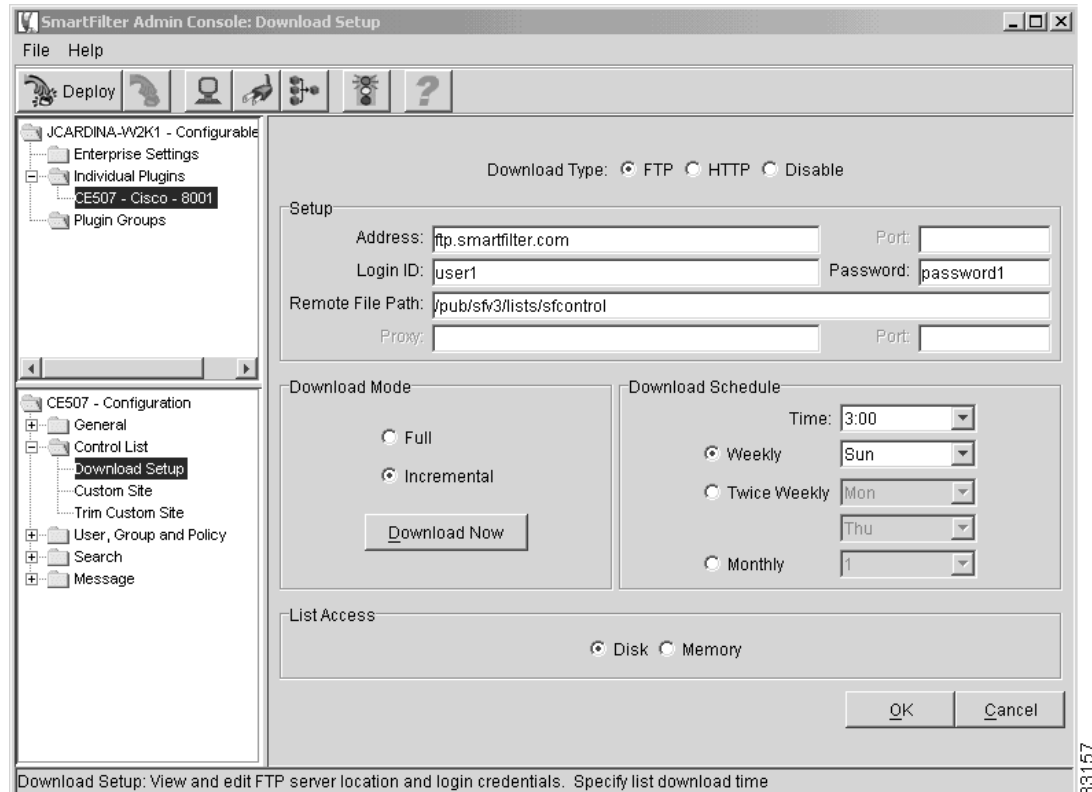
Note

You may have already entered some download setup information during the SmartFilter software installation process.

Use the Download Setup window for these tasks:

- [Choosing a Download Option and Setup](#)
- [Setting or Changing Download Mode Information](#)
- [Setting or Changing Download Schedule Information](#)
- [Setting or Changing the List Access Method](#)

Figure 6-1 Download Setup Window



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Choosing a Download Option and Setup

To set or change the download option and setup, follow these steps:

- Step 1** Choose one of the following download options:
- **FTP**—Choose this option to download the SmartFilter Control List from an FTP download site.
 - **HTTP**—Choose this option to download the SmartFilter Control List from an HTTP download site.
 - **Disable**—Choose this option to disable the Control List download feature.



Note Depending on the option you chose, the active fields on the window vary.

- Step 2** Complete the Setup fields that correspond to the download option you chose in [Step 1](#). [Table 6-1](#) lists and describes the fields in the Download Setup window.

Table 6-1 SmartFilter Control List Download Setup Fields

Field	Description
Address	Download site. <ul style="list-style-type: none"> • HTTP: list.smartfilter.com • FTP: ftp.smartfilter.com
Port	Port for the HTTP server of the download site. The default port is 80. Note If FTP is chosen as your download option, the Port field is disabled.
Login ID	ID that allows you to access the download site.
Password	Password that allows you to access the download site.
Remote File Path	Location of the SmartFilter Control List on the download site. <ul style="list-style-type: none"> • HTTP: /cgi-bin/getlist.cgi • FTP: /pub/sfv3/lists/sfcontrol
Proxy	Name of the HTTP proxy your organization uses to reach the Internet, if any. Note If FTP is chosen as your download option, the Proxy field is disabled.
Port	Port that corresponds to the HTTP proxy. Note If FTP is chosen as your download option, the Port field is disabled.

Step 3 Click **OK**.

Setting or Changing Download Mode Information



Note

If you chose **Disable** as the download option, none of the fields in the Download Mode area of the window are available.

To set or change the download mode, follow these steps:

Step 1 Choose one of the following download modes.

- Full—This mode downloads the full SmartFilter Control List every time.
- Incremental—This mode downloads the difference between your existing SmartFilter Control List and the most recent SmartFilter Control List. These changes are incremental files that are applied to your existing Control List, creating a new Control List.



Note

If you use this mode without having an existing SmartFilter Control List, a full Control List is downloaded.

Step 2 Click **OK**.

Setting or Changing Download Schedule Information



Note If you chose **Disable** as the download option, none of the fields in the Download Schedule area of the window are available.

To set or change the download schedule, follow these steps:

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- Step 1** Choose a time of day for the download from the Time drop-down list.
- Step 2** Choose one of the following download frequency options.
- **Weekly**—Choose a day of the week from the drop-down list.
 - **Twice Weekly**—Choose two different days from the drop-down lists.
 - **Monthly**—Choose a day of the month from the drop-down list.
- Step 3** Click **OK**.

To download the SmartFilter Control List immediately, click **Download Now**.



Note If you have made changes to the download setup, you must deploy the changes before clicking **Download Now**.

Setting or Changing the List Access Method

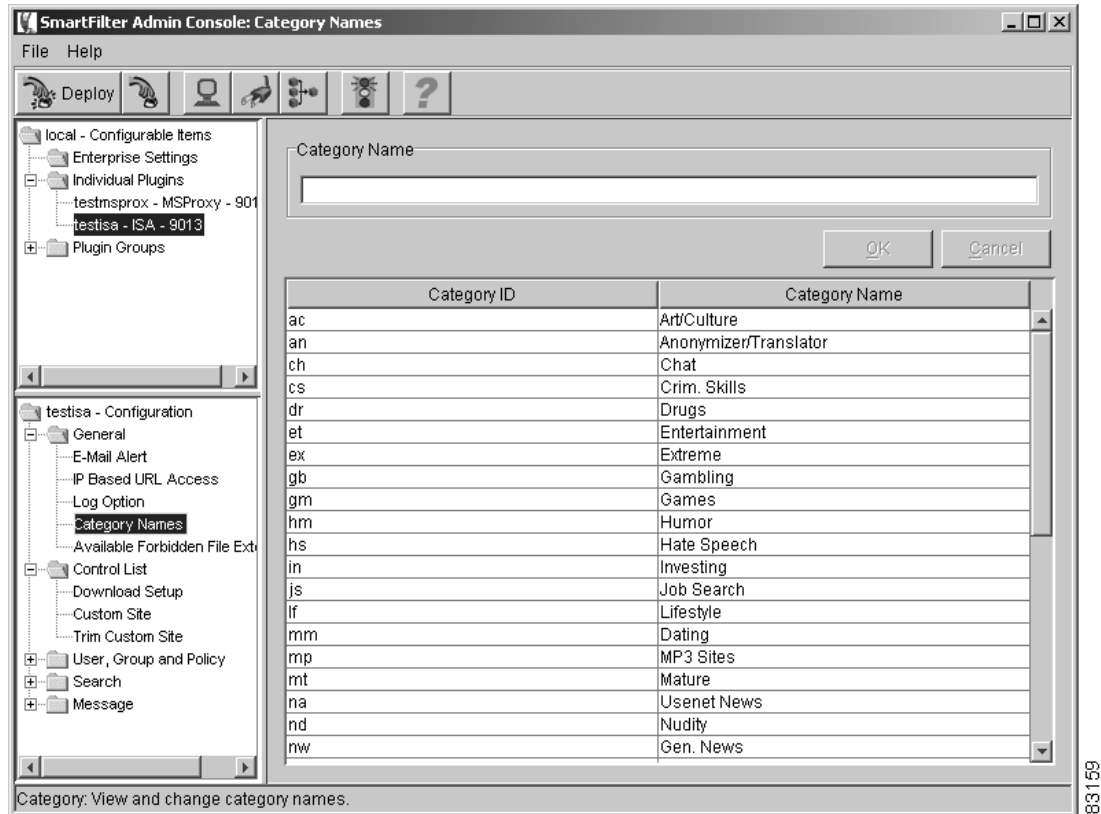
To set or change the list access method, follow these steps:

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- Step 1** Choose one of the following access methods.
- **Disk**—Accesses the SmartFilter Control List from the disk drive.
This option provides a faster startup time and lowers the amount of RAM usage. Accessing the list using this method can be slower, however, depending on the server device configuration.
 - **Memory**—Stores the entire SmartFilter Control List in RAM.
This method can be faster depending on the server device configuration. Because of the increasing size of the SmartFilter Control List, however, larger and larger amounts of RAM are required.
- Step 2** Click **OK**.

Renaming Control List Categories

The Category Names window, shown in [Figure 6-2](#), renames both the 30 predefined categories and the 10 user-defined categories.

Figure 6-2 Category Names Window



You can change the name of a category for either of these reasons:

- The name in the Category Name column is the name that gets logged, but you want either a longer or a shorter name to appear in the log.
- You want a more descriptive name (particularly if you have used one or more of the user-defined categories).

To change the name of a category, following these steps:

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- Step 1** Choose the category name in the Category Name column that you want to change.
The name currently assigned to the category appears in the Category Name field at the top of the window.
- Step 2** Enter the new name to be associated with the category.
- Step 3** Click **OK**.
The name that you entered becomes the new name for the category.
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Defining Custom Sites

Use the Custom Site window, shown in [Figure 6-3](#), for these tasks:

- [Adding a URL to an Existing Category](#)
- [Changing the Category of a URL](#)
- [Exempting a URL](#)
- [Deleting a URL from the Custom Sites List](#)
- [Finding a URL](#)

The Custom Site window always takes precedence over the SmartFilter Control List when you exempt URLs categorized by Secure Computing or recategorize a Control List URL.

SmartFilter software allows the use of “wildcards” (*) in the base domain name and ignores the domain name prefix. In addition, if you exempt or block a site or directory, you exempt or block all URLs from that site and its subdirectories.

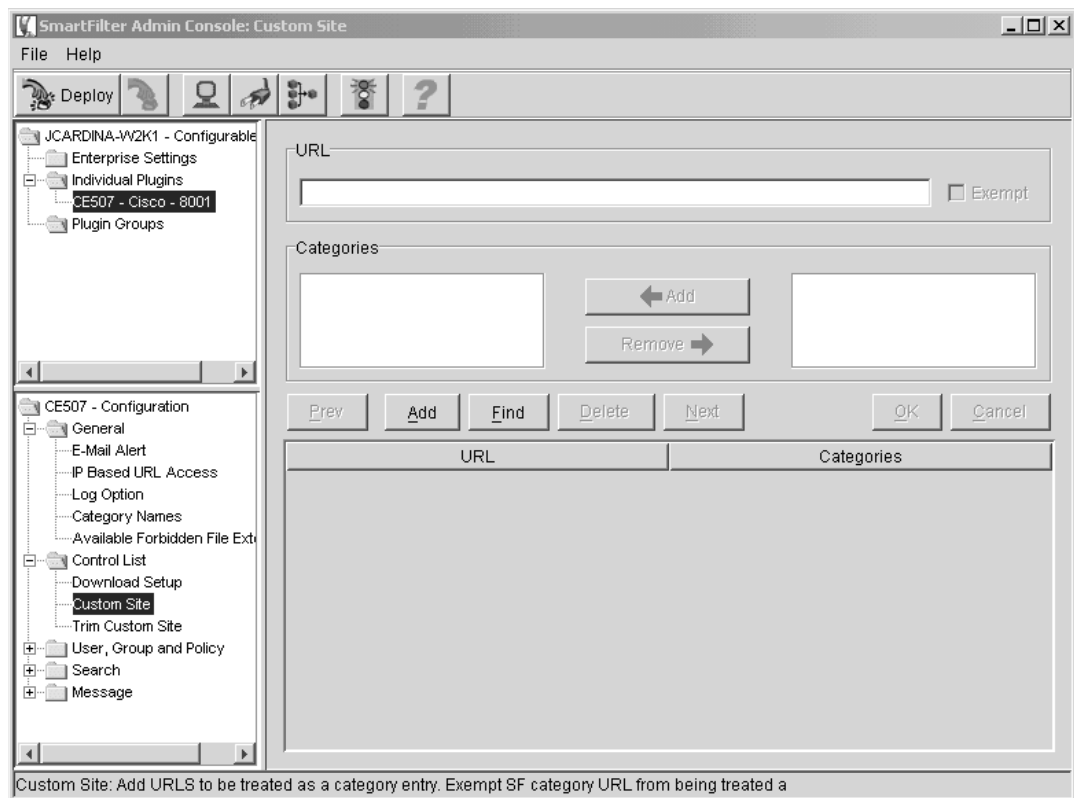
To exempt all *.gov URLs, for example, enter the following:

```
http://*.gov
```

To exempt all yahoo.com URLs, for example, enter the following:

```
http://*.yahoo.com
```

Figure 6-3 Custom Site Window



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It is important to ensure that the category you assign to a URL in the Custom Site window be reasonably accurate, because the message that appears when the site is coached or denied lists the category associated with the site. Additionally, the Trim Custom Site window uses the category as part of its criteria match.

For example, if you add www.weather.com to your custom sites list and categorize it as sex instead of travel or general news, the default message that users receive when they attempt to access www.weather.com is “Forbidden. This site is categorized as sex.” If the SmartFilter Control List later categorizes this site as general news, the trim custom sites function does not remove the site from your custom sites list because you have assigned it the category “sex.”

Two resources are available to help you when you are working with the Custom Site window:

- Category Summaries—[Chapter 2, “Understanding the SmartFilter Control List,”](#) provides a brief description of each of the 30 predefined categories in the SmartFilter Control List. It also provides examples and topics included in each category.
- SmartFilterWhere Tool—This website allows you to query the SmartFilter Control List. See the next section for details.

Using the SmartFilterWhere Tool

This tool enables you to check whether a site is categorized in the SmartFilter Release 3.1 Control List. SmartFilterWhere also allows you to suggest an alternative categorization for a site. You can use the SmartFilterWhere tool to do these tasks:

- Check whether a specific site is contained in the current SmartFilter Control List.
- Check the category for a site.
- Suggest additions or modifications to the SmartFilter Control List.

To access SmartFilterWhere from your Internet browser, follow these steps:

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- Step 1** Enter this URL in the address field of your Internet browser:
<http://www.smartfilterwhere.com>
The SmartFilterWhere page appears.
- Step 2** Click the **SmartFilterWhere for the SmartFilter V3.0.1 and V3.1 Control List** link.
The SmartFilterWhere URL check page appears.
- Step 3** Enter up to three URLs in the URL fields: URL 1, URL 2, and URL 3.

Step 4 Click **Check URLs**.

The Search Results page appears, and the URLs that you entered appear in the URL column along with their current categorization. The two options for current categorization are:

- Not Listed—The URL is not contained in the current SmartFilter Control List.
- Predefined—One or more of the 30 predefined SmartFilter Control List categories.

From the Predefined option, you can:

- Check another URL by clicking **Check Another URL**, which returns you to the main SmartFilterWhere page.
- Suggest an addition or change to the SmartFilter Control List by choosing a category from the drop-down list and clicking **Send Request**. A message appears, telling you that your request has been submitted.

Adding a URL to an Existing Category

To add a URL to an existing category, follow these steps:

Step 1 Click **Add**.

The beginning of the URL (http://) appears in the URL field.

Step 2 Click in the URL field and enter the rest of the URL.**Step 3** Choose the categories that you want to attach to the URL and click < **Add**.

Note If you do not choose a category for the URL, the default condition is to exempt the URL.

Step 4 Click **OK**.

The URL that you entered appears in the table at the bottom of the window.



Note Any categorization made here overrides categorizations in the SmartFilter Control List and is blocked, coached, delayed, or allowed according to the options that you have chosen.

Changing the Category of a URL

To change the category associated with a URL, follow these steps:

Step 1 Locate the URL for which you want to change categories using either of these methods:

- Choose a URL from the table.
- Search for a URL.

Step 2 Choose the URL in the table.

The categories associated with the URL appear in the Categories field.

Step 3 Add or remove categories for the URL.

- To add a category, choose the categories that you want to attach to the URL from the list on the right and click **< Add**.
- To remove a category, choose the categories that you want to remove from the URL from the list on the left and click **Remove >**.



Note If you do not choose the categories for the URL, the default condition is to exempt the URL.

Step 4 Click **OK**.

The URL that you entered appears in the table with the changes you made.



Note Any categorization made here overrides categorizations in the SmartFilter Control List and is blocked, coached, delayed, or allowed according to the options that you have chosen.

Exempting a URL

To exempt a URL from being treated with the same policy actions assigned to the category in which it exists, follow these steps:

Step 1 Click **Add**.

The beginning of the URL (`http://`) appears in the URL field.

Step 2 Click in the URL field and enter the rest of the URL.

Step 3 Click the **Exempt** check box to activate it.

Step 4 Click **OK**.

The URL that you entered appears in the table at the bottom of the window with the word *exempt* in the Categories column.



Note Any categorization made here overrides categorizations in the SmartFilter Control List and is blocked, coached, delayed, or allowed according to the options that you have chosen.

Deleting a URL from the Custom Sites List

To delete a URL from the custom sites list, follow these steps:

Step 1 Locate and choose the URL that you want to delete.



Note If you choose only one item to be deleted, you will not receive a warning or confirmation message when you click **Delete**. If you choose more than one item, a warning or confirmation message appears, asking if you are sure you want to delete the rows.

Step 2 Click **Delete**.
The URL is removed from the table.

Finding a URL

To find a URL in the table, follow these steps:

Step 1 Click **Find**.

The cursor appears in the URL field after the beginning of the URL (http://).

Step 2 Enter the rest of the URL name that you want to find.

Step 3 Click **OK**. One of the following occurs:

- A message appears, telling you that no row is found.
- The table displays only rows that match the search criteria you entered.

Step 4 Click **Cancel** to display the entire list of URLs.

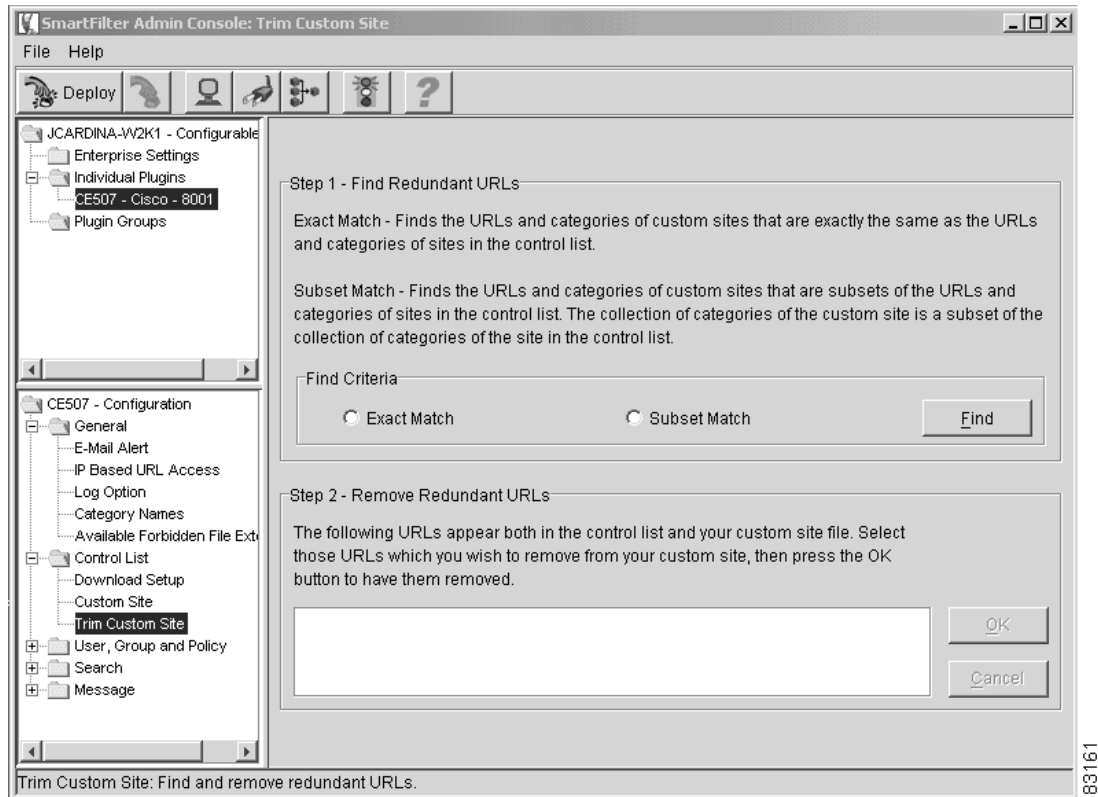
Trimming Custom Sites

The Trim Custom Site window, shown in [Figure 6-4](#), allows you to remove duplicate entries that may exist between your custom sites list and the SmartFilter Control List. Duplicate entries occur when you discover a site before it is added to the SmartFilter Control List. Trimming your custom site list keeps it smaller and easier to manage.



Note Any custom sites that you have added to your configuration must be deployed before you use the trim custom sites feature.

Figure 6-4 Trim Custom Site Window



To remove duplicate entries that may exist between your custom sites list and the SmartFilter Control List, follow these steps:

Step 1 Choose your Find Criteria.

- **Exact Match**—If you choose this option, only those URLs that are categorized exactly as the Control List has categorized them are trimmed.
- **Subset Match**—If you choose this option, SmartFilter software trims the URL if you have chosen at least one of the categories used by the SmartFilter Control List for the URL.

The URL that is entered in the custom site table is compared to other URLs. If the Control List contains `http://site1.com` as entertainment and chat, and the custom sites list contains `http://site1.com/home` as chat, then an exact match would not remove this URL, because the local site is only chat. On the other hand, a subset match would remove this URL, because it is categorized as chat in the Control List.

Step 2 Click **Find**.

The list of results appears in the Redundant URLs list at the bottom of the window.

- Step 3** Determine which redundant URLs to remove and then take one of following three appropriate actions:
- To remove all of the URLs in the list, click **OK**.
 - To remove only some of the URLs in the list, choose the URLs that you want to remove and click **OK**.
 - To stop the trim custom sites feature and leave the redundant URLs in the custom sites list, click **Cancel**.
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