Product Guide

McAfee ePolicy Orchestrator 5.1.0 Software
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Preface

Contents
- About this guide
- Find product documentation

About this guide
This information describes the guide's target audience, the typographical conventions and icons used in this guide, and how the guide is organized.

Audience
McAfee documentation is carefully researched and written for the target audience. The information in this guide is intended primarily for:

- **Administrators** — People who implement and enforce the company's security program.
- **Users** — People who use the computer where the software is running and can access some or all of its features.
- **Security officers** — People who determine sensitive and confidential data, and define the corporate policy that protects the company's intellectual property.
- **Reviewers** — People who evaluate the product.

Conventions
This guide uses these typographical conventions and icons.

- **Book title, term, emphasis**
  - Title of a book, chapter, or topic; a new term; emphasis.
- **Bold**
  - Text that is strongly emphasized.
- **User input, code, message**
  - Commands and other text that the user types; a code sample; a displayed message.
- **Interface text**
  - Words from the product interface like options, menus, buttons, and dialog boxes.
- **Hypertext blue**
  - A link to a topic or to an external website.

**Note:** Additional information, like an alternate method of accessing an option.

**Tip:** Suggestions and recommendations.
**Important/Caution:** Valuable advice to protect your computer system, software installation, network, business, or data.

**Warning:** Critical advice to prevent bodily harm when using a hardware product.

---

**Find product documentation**

McAfee provides the information you need during each phase of product implementation, from installation to daily use and troubleshooting. After a product is released, information about the product is entered into the McAfee online KnowledgeBase.

**Task**


2. Under **Self Service**, access the type of information you need:

<table>
<thead>
<tr>
<th>To access...</th>
<th>Do this...</th>
</tr>
</thead>
</table>
| User documentation | 1. Click **Product Documentation**.  
2. Select a product, then select a version.  
| KnowledgeBase | • Click **Search the KnowledgeBase** for answers to your product questions.  
• Click **Browse the KnowledgeBase** for articles listed by product and version. |
Introducing McAfee ePolicy Orchestrator software

Understand ePolicy Orchestrator components and how they work together to enhance the security of the systems in your network.

Chapter 1  Protecting your networks with ePolicy Orchestrator software
Chapter 2  Using the ePolicy Orchestrator interface
Protecting your networks with ePolicy Orchestrator software

ePolicy Orchestrator software is a key component of the McAfee Security Management Platform, which provides unified management of endpoint, network, and data security. Reduce incident response times, strengthen protection, and simplify risk and security management with ePolicy Orchestrator automation features and end-to-end network visibility.

Contents
- Benefits of ePolicy Orchestrator software
- Components and what they do
- How the software works

Benefits of ePolicy Orchestrator software

ePolicy Orchestrator software is a scalable, extensible management platform that enables centralized policy management and enforcement of your security products and the systems on which they reside. It also provides comprehensive reporting and product deployment capabilities, all through a single point of control.

Using ePolicy Orchestrator software, you can perform these network security tasks:
- Deploy security products, patches, and Service Packs to the systems in your network.
- Manage the host and network security products deployed to your systems through the enforcement of security policies and the creation of tasks.
- Update the detection definition (DAT) files, anti-virus engines, and other security content required by your security software to ensure that your managed systems are secure.

Components and what they do

These components make up ePolicy Orchestrator software.
- **McAfee ePO server** — The center of your managed environment. The server delivers security policies and tasks, controls updates, and processes events for all managed systems.
- **Database** — The central storage component for all data created and used by ePolicy Orchestrator. You can choose whether to house the database on your McAfee ePO server or on a separate system, depending on the specific needs of your organization.
- **McAfee Agent** — A vehicle of information and enforcement between the McAfee ePO server and each managed system. The agent retrieves updates, ensures task implementation, enforces policies, and forwards events for each managed system. It uses a separate secure data channel to transfer data to the server. A McAfee Agent can also be configured as a SuperAgent.
• **Master repository** — The central location for all McAfee updates and signatures, residing on the McAfee ePO server. The master repository retrieves user-specified updates and signatures from McAfee or from user-defined source sites.

• **Distributed repositories** — Local access points strategically placed throughout your environment for agents to receive signatures, product updates, and product installations with minimal bandwidth impact. Depending on how your network is configured, you can set up SuperAgent, HTTP, FTP, or UNC share distributed repositories.

• **Remote Agent Handlers** — A server that you can install in various network locations to help manage agent communication, load balancing, and product updates. Remote Agent Handlers are comprised of an Apache server and an event parser. They can help you manage the needs of large or complex network infrastructures by allowing you more control over agent-server communication.

• **Registered servers** — Used to register other servers with your ePolicy Orchestrator server. Registered server types include:
  - **LDAP server** — Used for Policy Assignment Rules and to enable automatic user account creation.
  - **SNMP server** — Used to receive an SNMP trap. Add the SNMP server’s information so that ePolicy Orchestrator knows where to send the trap.
  - **Database server** — Used to extend the advanced reporting tools provided with ePolicy Orchestrator software.
  - **Ticketing server** — Before tickets can be associated with issues, you must have a registered ticketing server configured. The system running the ticketing extension must be able to resolve the address of the Service Desk system.

Depending on the needs of your organization and the complexity of your network, you might only use some of these components.

### How the software works

McAfee ePO software is designed to be extremely flexible. It can be set up in many different ways, to meet your unique needs.

The software follows the classic client-server model, in which a client system (system) calls into your server for instructions. To facilitate this call to the server, a McAfee Agent is deployed to each system in your network. Once an agent is deployed to a system, the system can be managed by your ePolicy Orchestrator server. Secure communication between the server and managed system is the bond that
connects all the components of your ePolicy Orchestrator software. The figure below shows an example of how your ePolicy Orchestrator server and components inter-relate in your secure network environment.

1 Your ePolicy Orchestrator server connects to the McAfee update server to pull down the latest security content.

2 The ePolicy Orchestrator database stores all the data about the managed systems on your network, including:
   - System properties
   - Policy information
   - Directory structure
   - All other relevant data the server needs to keep your systems up-to-date.
3 McAfee Agents are deployed to your systems to facilitate:
   • Policy enforcement
   • Product deployments and updates
   • Reporting on your managed systems

4 Agent-server secure communication (ASSC) occurs at regular intervals between your systems and server. If remote Agent Handlers are installed in your network, agents communicate with the server through their assigned Agent Handlers.

5 Users log onto the ePolicy Orchestrator console to perform security management tasks, such as running queries to report on security status or working with your managed software security policies.

6 The McAfee update server hosts the latest security content, so your ePolicy Orchestrator can pull the content at scheduled intervals.

7 Distributed repositories placed throughout your network host your security content locally, so agents can receive updates more quickly.

8 Remote Agent Handlers help to scale your network to handle more agents with a single ePolicy Orchestrator server.

9 Ticketing servers connect to your ePolicy Orchestrator server to help manage your issues and tickets.

10 Automatic Response notifications are sent to security administrators to notify them that an event has occurred.
Using the ePolicy Orchestrator interface

Log on to the ePolicy Orchestrator interface to configure your McAfee ePO server, and to manage and monitor your network security.

Contents

- Log on and log off
- Navigating the interface
- Working with lists and tables

Log on and log off

To access the Cloud ePO software, enter your user name and password on the logon screen.

Before you begin

You must have the user name and password, which you received from your service provider, to log on to Cloud ePO.

Task

1. Using your browser, click the URL provided by your service provider to open the Cloud ePO logon screen.

2. Type your user name and password, then click Log On.

   Your Cloud ePO software displays the default dashboard.

3. To end your Cloud ePO session, click Log Off.

   Once you log off, your session is closed and can’t be opened by other users.

Navigating the interface

The ePolicy Orchestrator interface uses a menu-based navigation model with a Favorites bar you can customize to get where you need to go quickly.

Menu sections represent the top-level features of your ePolicy Orchestrator server. As you add new managed products to your server, the associated interface pages are either added to an existing category, or a new category is created in the Menu.
Using the ePolicy Orchestrator navigation Menu

Open the ePolicy Orchestrator Menu to navigate the ePolicy Orchestrator interface.

The Menu uses categories that comprise the various features and functionality of your McAfee ePO server. Each category contains a list of primary feature pages associated with a unique icon. Select a category in Menu to view and navigate to the primary pages that make up that feature.

Customizing the navigation bar

Customize the navigation bar for quick access to the features and functionality you use most often.

You can decide which icons are displayed on the navigation bar by dragging any menu item on or off the navigation bar.

On systems with 1024x768 screen resolution, the navigation bar can display six icons. When you place more than six icons on the navigation bar, an overflow menu is created on the right side of the bar. Click the down-arrow to access the menu items not displayed in the navigation bar. The icons displayed in the navigation bar are stored as user preferences, so each user’s customized navigation bar is displayed regardless of which console they use to log on to the server.

Server settings categories

These are the default server settings categories available in your ePolicy Orchestrator software.

When you check in more software to your McAfee ePO server, product-specific server settings are added to the Server settings category list. For information on product-specific server settings, see the associated product documentation. You can modify server settings from the interface by navigating to the Server Settings page in the Configuration section of the ePolicy Orchestrator interface.
### Table 2-1  Default server settings categories and their descriptions

<table>
<thead>
<tr>
<th>Server settings category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Directory Groups</td>
<td>Specifies the LDAP server to use for each domain.</td>
</tr>
<tr>
<td>Active Directory User Login</td>
<td>Specifies whether members of your mapped Active Directory (AD) groups can log on to your server using their AD credentials once the Active Directory User Login feature has been fully configured.</td>
</tr>
<tr>
<td>Agent Deployment Credentials</td>
<td>Specifies whether users are allowed to cache agent deployment credentials.</td>
</tr>
<tr>
<td>Certificate Based Authentication</td>
<td>Specifies whether Certificate Based Authentication is enabled, and the settings and configurations required for the Certificate Authority (CA) certificate being used.</td>
</tr>
<tr>
<td>Dashboards</td>
<td>Specifies the default active dashboard that is assigned to new users' accounts at the time of account creation, and the default refresh rate (5 minutes) for dashboard monitors.</td>
</tr>
<tr>
<td>Disaster Recovery</td>
<td>Enables and sets the Disaster Recovery keystore encryption passphrase.</td>
</tr>
<tr>
<td>Email Server</td>
<td>Specifies the email server that is used when ePolicy Orchestrator sends email messages.</td>
</tr>
<tr>
<td>Event Filtering</td>
<td>Specifies which events the agent forwards.</td>
</tr>
<tr>
<td>Event Notifications</td>
<td>Specifies the interval at which you want ePolicy Orchestrator Notification Events to be sent to Automatic Responses.</td>
</tr>
<tr>
<td>Global Updating</td>
<td>Specifies whether and how global updating is enabled.</td>
</tr>
<tr>
<td>License Key</td>
<td>Specifies the license key used to register this ePolicy Orchestrator software.</td>
</tr>
<tr>
<td>Login Message</td>
<td>Specifies the custom login message displayed, if any, to users in your environment when they navigate to the ePolicy Orchestrator console log on screen.</td>
</tr>
<tr>
<td>Policy Maintenance</td>
<td>Specifies whether policies for unsupported products are visible or hidden. This is needed only after ePolicy Orchestrator is upgraded from a previous version.</td>
</tr>
<tr>
<td>Ports</td>
<td>Specifies the ports used by the server when it communicates with agents and the database.</td>
</tr>
<tr>
<td>Printing and Exporting</td>
<td>Specifies how information is exported to other formats, and the template for PDF exports. It also specifies the default location where the exported files are stored.</td>
</tr>
<tr>
<td>Product Compatibility List</td>
<td>Specifies whether the Product Compatibility List is automatically downloaded and displays any incompatible product extensions.</td>
</tr>
<tr>
<td>Product Improvement Program</td>
<td>Specifies whether McAfee can collect data proactively and periodically from the client systems managed by the McAfee ePO server.</td>
</tr>
<tr>
<td>Proxy Settings</td>
<td>Specifies the type of proxy settings configured for your McAfee ePO server.</td>
</tr>
<tr>
<td>Security Keys</td>
<td>Specifies and manages the agent-server secure communication keys, and repository keys.</td>
</tr>
<tr>
<td>Server Certificate</td>
<td>Specifies the server certificate that your McAfee ePO server uses for HTTPS communication with browsers.</td>
</tr>
<tr>
<td>Software Evaluation</td>
<td>Specifies the required information supplied to enable check in and deployment of evaluation software from the Software Manager.</td>
</tr>
<tr>
<td>Source Sites</td>
<td>Specifies which source sites your server connects to for updates, as well as which sites should be used as a fallback.</td>
</tr>
<tr>
<td>System Details Settings</td>
<td>Specifies which queries and systems properties are displayed in the System Details page for your managed systems.</td>
</tr>
</tbody>
</table>
Working with lists and tables

Use ePolicy Orchestrator search and filter functionality to sort table data.

**Filter a list**

The lists in the ePolicy Orchestrator interface contain large amounts of information. Use preset or custom filters and row selection to restrict a list to pertinent items.

- From the bar at the top of a list, Select the preset or custom filter you want to use to filter the list.
  
  Only items that meet the filter criteria are displayed.

- Select the checkboxes next to the list items you want to focus on, then select the Show selected rows checkbox.
  
  Only the selected rows are displayed.

**Search for specific list items**

Use the Quick Find filter to find items in a large list.

- Default query names might be translated for your location. When communicating with users in other locales, remember that query names could differ.

**Task**

For option definitions, click ? in the interface.

1. Enter your search terms in the Quick Find field.
2. Click Apply.

Only items that contain the terms you entered in the Quick Find field are displayed.

- Click Clear to remove the filter and display all list items.

**Select table row checkboxes**

The ePolicy Orchestrator user interface has special table row selection actions and shortcuts that allow you to select table row checkboxes using click or Shift and click.

Some output pages in the ePolicy Orchestrator user interface display a checkbox next to each list item in the table. These checkboxes allow you to select rows individually, as groups, or all the rows in the table.

This table lists the keystrokes used to select table row checkboxes.

---

### Table 2-1  Default server settings categories and their descriptions (continued)

<table>
<thead>
<tr>
<th>Server settings category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Tree Sorting</td>
<td>Specifies whether and how System Tree sorting is enabled in your environment.</td>
</tr>
<tr>
<td>User Session</td>
<td>Specifies the amount of time a user can be inactive before the system logs them out.</td>
</tr>
<tr>
<td>To Select</td>
<td>Action</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Individual rows</td>
<td>Click individual rows</td>
</tr>
<tr>
<td>Group of rows</td>
<td>Click one checkbox, hold Shift, and click last checkbox in group</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>All rows</td>
<td>Click top checkbox in table headings</td>
</tr>
</tbody>
</table>
Using the ePolicy Orchestrator interface
Working with lists and tables
Setting up your ePolicy Orchestrator server

Setting up your ePolicy Orchestrator server is the first step to managing your network security.

Chapter 3: Planning your ePolicy Orchestrator configuration
Chapter 4: Setting up your McAfee ePO Server
Chapter 5: User accounts and permission sets
Chapter 6: Repositories
Chapter 7: Registered servers
Chapter 8: Agent Handlers
Planning your ePolicy Orchestrator configuration

To use your ePolicy Orchestrator server effectively, you must create a comprehensive plan specific to your environment. How you setup your server infrastructure, and how much configuration you need to perform depends on the unique needs of your network environment. Considering these areas in advance can reduce the time it takes to get up-and-running.

Contents

- Considerations for scalability
- Internet Protocols in a managed environment

Considerations for scalability

How you manage your scalability depends on whether you use multiple ePolicy Orchestrator servers, multiple remote Agent Handlers, or both.

With ePolicy Orchestrator software, you can scale your network vertically or horizontally.

- **Vertically scalability** — Adding and upgrading to bigger, faster hardware to manage larger and larger deployments. Scaling your ePolicy Orchestrator server infrastructure vertically is accomplished by upgrading your server hardware, and using multiple ePolicy Orchestrator servers throughout your network, each with its own database.

- **Horizontal scalability** — Accomplished by increasing the deployment size that a single ePolicy Orchestrator server can manage. Scaling your server horizontally is accomplished by installing multiple remote Agent Handlers, each reporting to a single database.

When to use multiple McAfee ePO servers

Depending on the size and make-up of your organization, using multiple McAfee ePO servers might be required.

Some scenarios in which you might want to use multiple servers include:

- You want to maintain separate databases for distinct units within your organization.
- You require separate IT infrastructures, administrative groups, or test environments.
- Your organization is distributed over a large geographic area, and uses a network connection with relatively low bandwidth such as a WAN, VPN, or other slower connections typically found between remote sites. For more information about bandwidth requirements, see the *McAfee ePolicy Orchestrator Hardware Usage and Bandwidth Sizing Guide*.

Using multiple servers in your network requires that you maintain a separate database for each server. You can roll up information from each server to your main McAfee ePO server and database.
When to use multiple remote Agent Handlers

Multiple remote Agent Handlers help you manage large deployments without adding additional McAfee ePO servers to your environment.

The Agent Handler is the component of your server responsible for managing agent requests. Each McAfee ePO server installation includes an Agent Handler by default. Some scenarios in which you might want to use multiple remote Agent Handlers include:

- You want to allow agents to choose between multiple physical devices, so they can continue to call in and receive policy, task, and product updates; even if the application server is unavailable, and you don't want to cluster your ePolicy Orchestrator server.

- Your existing ePolicy Orchestrator infrastructure needs to be expanded to handle more agents, more products, or a higher load due to more frequent agent-server communication intervals (ASCI).

- You want to use your ePolicy Orchestrator server to manage disconnected network segments, such as systems that use Network Address Translation (NAT) or in an external network.

Multiple Agent Handlers can provide added scalability and lowered complexity in managing large deployments. However, because Agent Handlers require a very fast network connection, there are some scenarios in which you should not use them, including:

- To replace distributed repositories. Distributed repositories are local file shares intended to keep agent communication traffic local. While Agent Handlers do have repository functionality built in, they require constant communication with your ePolicy Orchestrator database, and therefore consume a significantly larger amount of bandwidth.

- To improve repository replication across a WAN connection. The constant communication back to your database required by repository replication can saturate the WAN connection.

- To connect a disconnected network segment where there is limited or irregular connectivity to the ePolicy Orchestrator database.

Internet Protocols in a managed environment

ePolicy Orchestrator software is compatible with both Internet Protocol versions, IPv4 and IPv6.
ePolicy Orchestrator servers work in three different modes:

- **Only IPv4** — Supports only IPv4 address format
- **Only IPv6** — Supports only IPv6 address format
- **Mixed mode** — Supports both IPv4 and IPv6 address formats

The mode in which your ePolicy Orchestrator server works depends on your network configuration. For example, if your network is configured to use only IPv4 addresses, your server works in Only IPv4 mode. Similarly, if your network is configured to use both IPv4 and IPv6 addresses, your server works in Mixed mode.

Until IPv6 is installed and enabled, your ePolicy Orchestrator server listens only on IPv4 addresses. When IPv6 is enabled, it works in the mode in which it is configured.
When the McAfee ePO server communicates with an Agent Handler on IPv6, address-related properties such as IP address, subnet address, and subnet mask are reported in IPv6 format. When transmitted between client and ePolicy Orchestrator server, or when displayed in the user interface or log file, IPv6-related properties are displayed in the expanded form and are enclosed in brackets.

For example, 3FFE:85B:1F1F::A9:1234 is displayed as [3FFE:085B:1F1F:0000:0000:0000:00A9:1234].

When setting an IPv6 address for FTP or HTTP sources, no modifications to the address are needed. However, when setting a Literal IPv6 address for a UNC source, you must use the Microsoft Literal IPv6 format. See Microsoft documentation for additional information.
Setting up your McAfee ePO Server

Get up-and-running quickly by configuring the essential features of your McAfee ePO server.

Contents

- Server configuration overview
- Use Product Deployment during automatic configuration
- Essential features for manual or Guided Configuration
- Automatic product configuration
- Log on and log off
- Configure essential features
- Use a proxy server
- Enter your license key
- Post-setup tasks

Server configuration overview

You can set up your ePolicy Orchestrator server to meet the unique needs of your environment using multiple methods.

The essential features of your McAfee ePO server that you must configure are:

- **Software Manager** — Allows you to check in new and updated security software to your ePolicy Orchestrator server and Master Repository from within the console.

- **System Tree** — Contains all systems managed by your ePolicy Orchestrator server.

- **Policy Catalog** — Where you configure the policies that control the security software deployed to your managed systems.

- **Client Task Catalog** — Where you create, assign, and schedule client tasks to automate tasks that run on your managed systems.

- **McAfee Agent** — Enables management of a system on your network. Once deployed, the agent communicates status and all associated data to and from your server and the managed system. It is the vehicle through which security software is deployed, policies are enforced, and tasks are assigned.

  The McAfee Agent is an independent software product required for your ePolicy Orchestrator server to manage systems on your network. The McAfee Agent checks in to your Master Repository automatically when you initially install your McAfee ePO software.

You can configure these essential features using:
• **Initial Product Deployment** — It configures all essential features automatically.

  View the Welcome to ePolicy Orchestrator slide show to familiarize yourself with the software and how it works.

• **Guided Configuration** — It walks you through configuration of each essential feature.

• **Manual configuration processes** — The processes for each essential feature is described in this guide.

Most users configure their ePolicy Orchestrator server automatically. But, manual configuration might be better for users with certain restrictions, for example:

- No Internet access
- Direct download restrictions to critical infrastructure
- Phased deployment processes that require products be released incrementally into critical environments
- Large organizations with specific requirements within their environment

This table lists an overview of the steps needed to configure ePolicy Orchestrator using simplified or guided configuration.
Table 4-1  Overview of different configuration steps

<table>
<thead>
<tr>
<th>Initial Product Deployment steps</th>
<th>Guided Configuration steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ePolicy Orchestrator installation completes and you start the software.</td>
<td>1 ePolicy Orchestrator installation completes and you start the software.</td>
</tr>
<tr>
<td>2 From the logon screen, log on to ePolicy Orchestrator. The Getting Started with ePolicy Orchestrator dashboard page appears.</td>
<td>2 From the logon screen, log on to ePolicy Orchestrator.</td>
</tr>
<tr>
<td>If the Automatic Product Configuration page appears, a product failed to download or install.</td>
<td>3 Run ePolicy Orchestrator Guided Configuration to perform these processes:</td>
</tr>
<tr>
<td>3 Run through the Welcome to ePolicy Orchestrator slide show to familiarize yourself with the software and how it works.</td>
<td></td>
</tr>
<tr>
<td>4 In the Product Deployment dashboard, confirm all of the automatically installed products and versions are correct and click Start Deployment.</td>
<td></td>
</tr>
<tr>
<td>5 Complete these steps as needed for your environment:</td>
<td></td>
</tr>
<tr>
<td>• Configure general server settings</td>
<td></td>
</tr>
<tr>
<td>• Configure advanced server settings and features</td>
<td></td>
</tr>
<tr>
<td>• Create user accounts</td>
<td></td>
</tr>
<tr>
<td>• Configure permission sets</td>
<td></td>
</tr>
<tr>
<td>6 ePolicy Orchestrator is configured and ready to protect your systems.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use Product Deployment during automatic configuration

You can use the Initial Product Deployment to quickly deploy and install products to ePolicy Orchestrator and your managed systems.

Before you begin

After you install your ePolicy Orchestrator software, the Automatic Product Configuration starts downloading and installing the products you are entitled to by your site license.

You will probably never see Automatic Product Configuration unless an error occurs.

These are the major steps needed to automatically configure ePolicy Orchestrator after initial installation.
Task

1. Click the Launch ePolicy Orchestrator icon on your McAfee ePO server desktop, to see the Log On screen.

2. Type your credentials and pick a language in the Log On dialog box.

   The Getting Started with ePolicy Orchestrator dashboard displays the Welcome to ePolicy Orchestrator slide show and Product Deployment dashboards.

3. Run through the Welcome to ePolicy Orchestrator slide show to familiarize yourself with the user interface and the configuration process.

   The Product Deployment dashboard displays all of the products automatically downloaded and installed by Automatic Product Configuration.

4. Confirm the products installed and versions are correct and click Start Deployment.

5. Complete your ePolicy Orchestrator configuration by performing these tasks, as needed:
   - Configure general server settings — Server settings in this group affect functionality that you do not need to modify for your server to operate correctly, but you can customize some aspects of how your server works.
   - Create user accounts and configure permission sets — User accounts provide a means for users to access the server and permission sets grant rights and access to ePolicy Orchestrator features.
   - Configure advanced server settings and features — Your ePolicy Orchestrator server provides advanced features and functionality to help you automate the management of your network security.
   - Set up additional components — Additional components such as distributed repositories, registered servers, and Agent Handlers are required to use many of the advanced features of your ePolicy Orchestrator software.

Your McAfee ePO server is now protecting your managed systems.

Essential features for manual or Guided Configuration

Several McAfee ePO server features are essential for its use, and must be set up during manual or Guided Configuration. These features are required before you can deploy and manage security software on the systems in your network.

The ePolicy Orchestrator software comes equipped with the Guided Configuration tool. This tool is designed to help you configure essential features, and to become familiar with the ePolicy Orchestrator interface. The Guided Configuration helps you complete the necessary steps to:

1. Get McAfee security software checked in to your Master Repository, so it can be deployed to systems in your network.

2. Add your systems to the ePolicy Orchestrator System Tree, so you can bring them under management.

3. Create and assign at least one security policy to be enforced on your managed systems.

4. Schedule a client update task to keep your security software current.

5. Deploy your security software to your managed systems.
The Guided Configuration is not required. If you perform these steps manually, we recommend that you use a similar workflow during your configuration process. Regardless of the method you choose to configure these features, you can continue to modify and tune your server’s configuration using the Guided Configuration tool or by navigating directly to each page from the McAfee ePO Menu.

**Automatic product configuration**

During an automatic configuration, your McAfee ePO server downloads and installs all the McAfee products entitled to you by your site license.

In most cases, during an automatic configuration, you never see the Automatic Product Configuration process run. It starts running as soon as you complete installing the ePolicy Orchestrator software and is usually finished before you log on.

If the Automatic Product Configuration page appears when you initially log on to ePolicy Orchestrator, an error occurred while downloading or installing your products. For example if your Internet connection is interrupted. Make a note of the product that failed to install and click **Retry** to attempt the product installation again.

If you want to stop the automatic product installation, click **Stop**. A confirmation dialog box asks you to confirm that you want to use Software Manager to install your products.

> Once you click **OK** in the **Stop Automatic Product Setup** confirmation dialog box, you must use the Software Manager to install your products. Automatic Product Configuration is available only once during your initial configuration.

If a product continues to fail during Automatic Product Configuration, contact McAfee Technical Support. Or, click **OK** to exit the Automatic Product Configuration page and begin setting up the McAfee ePO server.

For future product installation status information, open the Software Manager: **Menu** | **Software** | **Software Manager**.

**Log on and log off**

To access the ePolicy Orchestrator software, enter your user name and password on the logon screen.

> **Before you begin**
> You must have a user name and password assigned before you can log on to ePolicy Orchestrator.

Whether you connect to your McAfee ePO server from a remote connection or from the McAfee ePO server icon, the first screen you see is the ePolicy Orchestrator logon screen.

**Task**

1. Type your user name, password, and click **Log On**.
   Your ePolicy Orchestrator software displays the default dashboard.

2. To end your ePolicy Orchestrator session, click **Log Off**.
   Once you log off, your session is closed and can't be opened by other users.
Configure essential features

Use the Guided Configuration tool to configure essential features. Or you can use these tasks to guide you when manually configuring your ePolicy Orchestrator server.

Before you begin
To configure ePolicy Orchestrator manually or use Guided Configuration, you must stop Automatic Product Configuration from running. This task assumes you ran the ePolicy Orchestrator Setup.exe at the command line with the SKIPAUTOPRODINST=1 parameter to disable Automatic Product Configuration.

For option definitions, click ? in the interface.

Task
1. Click the Launch ePolicy Orchestrator icon on your McAfee ePO server desktop, to see the Log On screen.
2. Type your user name, password, and select a language, if needed, and click Log On. ePolicy Orchestrator starts and displays the Dashboard dialog box.
3. Click Menu | Reporting | Dashboards, select Guided Configuration from the Dashboard drop-down, then click Start.
4. Review the Guided Configuration overview and instructions, then click Start.
5. On the Software Selection page:
   a. Under the Software Not Checked In product category, click Licensed or Evaluation to display available products.
   b. In the Software table, select the product you want to check in. The product description and all available components are displayed in the table below.
   c. Click Check In All to check in product extensions to your ePolicy Orchestrator server, and product packages into your Master Repository.
   d. Click Next at the top of the screen when you're finished checking in software and ready to move on to the next step.
6. On the System Selection page:
   a. Select the group in your System Tree where you want to add your systems. If you don't have any custom groups defined, select My Organization, then click Next. The Adding your systems dialog box opens.
   b. Select which method you want to use to add your systems to the System Tree.
Add systems using... | To... | Then...
---|---|---
AD Sync | Synchronize your ePolicy Orchestrator server with your Active Directory (AD) server or Domain Controller (DC). If you're using one of these in your environment, AD Sync is the quickest way to add your systems to the System Tree. | 1 In the AD Sync dialog box, select the synchronization type you want to use and specify the appropriate settings.
2 Click Synchronize and Save to move on to the next step.

Manual | Manually add systems to your System Tree by specifying names or browsing a list of systems by domain. | 1 In the New Systems page, click Browse to add individual systems from a domain and click OK, or type system names in the Target systems field.
2 Click Add Systems to move on to the next step.

7 On the Policy Configuration page:

Select... | To... | Then...
---|---|---
Accept Defaults | Use the My Default policy setting for the software you'll deploy and continue your configuration. | This step is complete.

Configure Policy | Specify custom policy settings now for each software product you checked in. | 1 In the Policy Configuration dialog box, click OK.
2 Select a product from the Product list and click My Default to edit the default policy settings.
3 Click Next to move on to the next step.

8 On the Software Updating page:

Select... | To... | Then...
---|---|---
Create Defaults | Automatically create a default product update client task that runs daily at 12:00 P.M. | This step is complete.

Set Task Schedule | Manually configure the schedule for your product update client task. | 1 Using the Client Task Assignment Builder, specify a Product and Task Name for your product update task.

Do not change the Task Type selection. Task Type must be set to Product Update.

2 Configure the Lock task inheritance and Tags options, then click Next.
3 Specify the schedule for the update task, then click Next.
4 Review the summary and click Save.
9 On the **Software Deployment** page:
   a In the **System Tree**, select the location that contains the systems where you want to deploy your software, then click **Next**. Click **OK** to continue.
   b Specify your settings for the McAfee Agent deployment, then click **Deploy**.

   Click **Skip Agent Deployment** if you want to wait until later to perform this action. However, you must deploy agents before you can deploy your other security software.

   c Select the software packages you want to deploy to your managed systems, then click **Deploy**.

10 On the **Configuration Summary** page, click **Finish** to close the **Guided Configuration**.

11 Complete your ePolicy Orchestrator configuration by performing these tasks, as needed:
   - **Configure general server settings** — Server settings in this group affect functionality that you do not need to modify for your server to operate correctly, but you can customize some aspects of how your server works.
   - **Create user accounts and configure permission sets** — User accounts provide a means for users to access the server, and permission sets grant rights and access to ePolicy Orchestrator features.
   - **Configure advanced server settings and features** — Your ePolicy Orchestrator server provides advanced features and functionality to help you automate the management of your network security.
   - **Set up additional components** — Additional components such as distributed repositories, registered servers, and Agent Handlers are required to use many of the advanced features of your ePolicy Orchestrator software.

Your McAfee ePO server is now protecting your managed systems.

**Use a proxy server**

If you use a proxy server in your network environment, you need to specify the proxy settings in the ePolicy Orchestrator server settings.

**Task**

For option definitions, click ? in the interface.

1 Click **Menu | Configuration | Server Settings**, select **Proxy Settings** from the **Setting Categories**, then click **Edit**.

2 Select **Configure the proxy settings manually**, provide the specific configuration information your proxy server uses for each set of options, then click **Save**.

**Enter your license key**

Your license key entitles you to a full installation of the software, and populates the ePolicy Orchestrator Software Manager with the licensed McAfee software your company owns.

Without a license key, your software runs in evaluation mode. Once the evaluation period is expired, the software ceases to function. You can add a license key at any time during or after the evaluation period.
Task
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select License Key from the Setting Categories, then click Edit.
2. Type your License Key and click Save.

Post-setup tasks
After you have configured the essential features of your McAfee ePO server, perform the following post-setup tasks as needed.

- Create user accounts and permission sets
- Configure Active Directory User login
- Configure certificate authentication
- Manage security keys
- Configure source and fallback sites
- Set up repositories
- Set up registered servers
- Determine what events are forwarded to the server
- Configure Disaster Recovery settings
User accounts and permission sets

Each user account is associated with one or more permission sets, which define what the user is allowed to do with the software.

Contents
- User accounts
- Edit Certificate Based Authentication page
- Client certificate authentication
- Permission sets

User accounts

User accounts allow you to control how users access and use the software. Even the smallest of ePolicy Orchestrator installations needs to specify and control the access users have to different parts of the system.

Contents
- Types of user accounts
- Manage user accounts
- Create a custom logon message
- Configuring Active Directory user logon

Types of user accounts

There are two types of users, administrators and users with limited permissions. User accounts can be created and managed in several ways. You can:

- Create user accounts manually, then assign each account an appropriate permission set.
- Configure your ePolicy Orchestrator server to allow users to log on using Windows authentication.

Allowing users to log on using their Windows credentials is an advanced feature that requires configuration and set up of multiple settings and components. For more information on this option, see Managing ePolicy Orchestrator users with Active Directory.

While user accounts and permission sets are closely related, they are created and configured using separate steps. For more information on permission sets, see Setting up permission sets.

Manage user accounts

You can create, edit, and delete user accounts manually with the User Management page.

McAfee recommends disabling the Login status of an account instead of deleting it, until you are sure all valuable information associated with the account has been moved to other users.
Task
For option definitions, click ? in the interface.

2. Select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| Create user.  | Click New User and the New User page appears.  
1. Type a user name.  
2. Select whether to enable or disable the logon status of this account. If this account is for someone who is not yet a part of the organization, you might want to disable it.  
3. Select whether the new account uses McAfee ePO authentication, Windows authentication, or Certificate Based Authentication and provide the required credentials or browse and select the certificate.  
4. Optionally, provide the user's full name, email address, phone number, and a description in the Notes text box.  
5. Choose to make the user an administrator, or select the appropriate permission sets for the user.  
6. Click Save to return to the Users tab.  
The new user should appear in the Users list of the User Management page. |
| Edit user.    | From the Users list, select the user you want to edit, then click Action | Edit, and the Edit User page appears.  
1. Edit the account as needed.  
2. Click Save.  
The user changes should appear in the Users list of the User Management page. |
| Delete user.  | From the Users list, select the user you want to delete, then click Action | Delete, and a confirmation dialog appears. Click OK.  
The user should disappear from the Users list of the User Management page. |

Create a custom logon message
Create and display a custom logon message to be displayed on the Log On page.  
Your message can be written in plain text, or formatted using HTML. If you create an HTML formatted message, you are responsible for all formatting and escaping.

Task
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Login Message from the Setting Categories, then click Edit.  
2. Select Display custom login message, then type your message and click Save.

Configuring Active Directory user logon
You can reduce the overhead of managing user accounts and access by configuring Active Directory user logon.
Managing ePolicy Orchestrator users with Active Directory

You can use pre-existing Windows authenticated user credentials to automatically create ePolicy Orchestrator users and assign permissions to them.

This process is accomplished by mapping ePolicy Orchestrator permission sets to Active Directory groups in your environment. This feature can reduce the management overhead when you have a large number of ePolicy Orchestrator users in your organization. To complete the configuration, you must work through the following process:

- Configure user authentication.
- Register LDAP servers.
- Assign permission sets to the Active Directory group.

User authentication

ePolicy Orchestrator users can be authenticated with ePolicy Orchestrator password authentication or Windows authentication. If you use Windows authentication, you can specify whether users authenticate:

- Against the domain that your McAfee ePO server is joined to (default).
- Against a list of one or more domain controllers.
- Against a list of one or more DNS-style domain names.
- Using a WINS server to look up the appropriate domain controller.

If you use domain controllers, DNS-style domain names, or a WINS server, you must configure the Windows authentication server setting.

Registered LDAP servers

It is necessary to register LDAP servers with your McAfee ePO server to permit dynamically assigned permission sets for Windows users. Dynamically assigned permission sets are permission sets assigned to users based on their Active Directory group memberships.

Users trusted via one-way external trusts are not supported.

The user account used to register the LDAP server with ePolicy Orchestrator must be trusted via a bi-directional transitive trust, or must physically exist on the domain where the LDAP server belongs.

Windows authorization

The server setting for Windows authorization specifies which Active Directory (AD) server ePolicy Orchestrator uses to gather user and group information for a particular domain. You can specify multiple domain controllers and AD servers. This server setting supports the ability to dynamically assign permission sets to users that supply Windows credentials at login.

ePolicy Orchestrator can dynamically assign permission sets Windows Authenticated users even if Active Directory User Login is not enabled.
Assign permissions

You must assign at least one permission set to an AD group other than a user's Primary Group. Dynamically assigning permission sets to a user's Primary Group is not supported, and results in application of only those permissions manually assigned to the individual user. The default Primary Group is "Domain Users."

Active Directory User Login

When you have configured the previously discussed sections, you can enable the User autocreation server setting. User autocreation allows user records to be automatically created when the following conditions are met:

- Users provide valid credentials, using the <domain\name> format. For example, a user with Windows credentials jsmith1, who is a member of the Windows domain named eng, would supply the following credentials: eng\jsmith1, along with the appropriate password.
- An Active Directory server that contains information about this user has been registered with ePolicy Orchestrator.
- The user is a member of at least one Domain Local or Domain Global group that maps to an ePolicy Orchestrator permission set.

Windows authentication and authorization strategies

You can take many approaches when planning how to register your LDAP servers. Taking the time in advance to plan your server registration strategy will help you get it right the first time and reduce problems with user authentication.

Ideally, this is a process you go through once, and only change if your overall network topology changes. Once servers are registered and Windows authentication configured, you shouldn't need to modify these settings very often.

Authentication versus authorization

Authentication involves verifying the user's identity. This is the process of matching the credentials supplied by the user to something the system trusts as authentic. This could be an ePolicy Orchestrator server account, Active Directory credentials, or a certificate. If you want to use Windows authentication, you will need to examine how the domains (or servers) containing your user accounts are organized.

Authorization is after you've verified the user's credentials. This is where permission sets are applied, determining what the user can do within the system. When using Windows authentication, you can determine what users from different domains should be authorized to do. This is done by attaching permission sets to groups contained within these domains.

User account network topology

How much effort will be required to fully configure Windows authentication and authorization depends on your network topology, and the distribution of user accounts across your network.

- If the credentials for your prospective users are all contained in a small set of domains (or servers) contained within a single domain tree, merely register the root of that tree, and you're done.
- If your user accounts are more spread out, you will need to register a number of servers or domains. Determine the minimum number of domain (or server) sub-trees you will need and register the roots of those trees. Try to register them in the order they'll be most used. As the authentication process goes down the list of domains (or servers) in the order they're listed, putting the most commonly used domains at the top of the list will improve average authentication performance.
Permission structure
For users to be able to log on to an ePolicy Orchestrator server using Windows authentication, a permission set must be attached to the Active Directory group their account belongs to on their domain. When determining how permission sets should be assigned, keep in mind the following capabilities:

- Permission sets can be assigned to multiple Active Directory groups.
- Permission sets can be dynamically assigned only to an entire Active Directory group. They cannot be assigned to just some users within a group.

If you need to assign special permissions to an individual user, you can do so by creating an Active Directory group that contains only that user.

Configure Windows authentication and authorization
These tasks help you set up Active Directory User logon.

Tasks
- Enable Windows authentication in the McAfee ePO server on page 45
  Before more advanced Windows authentication can be used, the server must be prepared.
- Configure Windows authentication on page 45
  There are many ways to use existing Windows account credentials within ePolicy Orchestrator.
- Configure Windows authorization on page 46
  Users attempting to log on to an ePolicy Orchestrator server with Windows authentication need a permission set assigned to one of their Active Directory groups.

Enable Windows authentication in the McAfee ePO server
Before more advanced Windows authentication can be used, the server must be prepared.

To activate the Windows Authentication page in the server settings, you must first stop the ePolicy Orchestrator service. This task must be performed on the McAfee ePO server itself.

Task
For option definitions, click ? in the interface.

1. From the server console, select Start | Settings | Control Panel | Administrative Tools
2. Select Services.
3. In the Services window, right-click McAfee ePolicy Orchestrator Applications Server and select Stop.
4. Rename Winauth.dll to Winauth.bak.
   In a default installation, this file is found in C:\Program Files\McAfee\ePolicy Orchestrator \Server\bin.
5. Restart the server.

When you next open the Server Settings page, a Windows Authentication option appears.

Configure Windows authentication
There are many ways to use existing Windows account credentials within ePolicy Orchestrator.

Before you begin
You must have first prepared your server for Windows authentication.

How you configure these settings depends on several issues:
• Do you want to use multiple domain controllers?
• Do you have users spread across multiple domains?
• Do you want to use a WINS server to look up which domain your users are authenticating against?

Without any special configuration, users can authenticate using Windows credentials for the domain that the McAfee ePO server is joined to, or any domain that has a two-way trust relationship with the McAfee ePO server’s domain. If you have users in domains that don't meet that criteria, configure Windows authentication.

**Task**
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, then select Windows Authentication from the Settings Categories list.
2. Click Edit.
3. Specify whether you want to use one or more Domains, one or more Domain controllers, or a WINS server.
   Domains must be provided in DNS format. (for example, internaldomain.com) Domain controllers and WINS servers must have fully-qualified domain names. (for example, dc.internaldomain .com)
   You can specify multiple domains or domain controllers, but only one WINS server. Click + to add more domains or domain controllers to the list.
4. Click Save when you are finished adding servers.

If you specify domains or domain controllers, the McAfee ePO server attempts to authenticate users with servers in the order they are listed. It starts at the first server in the list and continues down the list until the user authenticates successfully.

**Configure Windows authorization**
Users attempting to log on to an ePolicy Orchestrator server with Windows authentication need a permission set assigned to one of their Active Directory groups.

**Task**
For option definitions, click ? in the interface.

1. Click Menu | User Management | Permission Sets.
2. Either choose an existing permission set from the Permission Sets list and click Edit in the Name and users section, or click Actions | New.
3. Select any individual users the permission set applies to.
4. Select a Server name from the list and click Add.
5. In the LDAP browser, navigate through the groups and select the groups to which this permission set applies.
   Selecting an item in the Browse pane displays the members of that item in the Groups pane. You can select any number of those groups to receive the permission set dynamically. Only members from one item at a time can be added. If you need to add more, repeat steps 4 and 5 until you are finished.
6. Click Save.
The permission set will now be applied to all users from the groups you specified logging on to the server using Windows authentication.

### Edit Certificate Based Authentication page

Use this page to enable certificate-based authentication, set the client certificate, and other more advanced settings.

#### Option definitions

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Certificate Based Authentication</td>
<td>Select or deselect the checkbox to enable or disable certificate-based authentication.</td>
</tr>
<tr>
<td>CA certificate for client certificate</td>
<td>• Click in the field or click <strong>Browse</strong> to locate the file and enter its path name.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Certificate file password</strong> — If the specified certificate file is in PKCS12 format, the appropriate password must be entered here.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Certificate alias name</strong> — If the specified certificate file is in PKCS12 format, the appropriate alias name must be entered here.</td>
</tr>
<tr>
<td>Certificate Revoked List file (PEM)</td>
<td>Click in the field or click <strong>Browse</strong> to locate the file and enter its path name.</td>
</tr>
<tr>
<td>OCSP</td>
<td>• <strong>Enable OCSP Checking</strong> — Online Certificate Status Protocol (OCSP) is an alternative method of checking a certificate's authenticity. If selected, you must supply a <strong>Default OCSP URL</strong>.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Default OCSP URL</strong> — The URL of an OCSP Responder that is checked to verify a certificate’s authenticity.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Enable CRL Distribution Point check when server could not get OCSP response</strong> — Enable this to fall back to standard CRL verification if a response from the OCSP Responder is not received.</td>
</tr>
<tr>
<td>All remote users must use certificate to sign in</td>
<td>Forces all remote users to use certificate-based login. Users are not given the choice of using their user name and password, except when they login from the local machine.</td>
</tr>
<tr>
<td>Certificate user name defaults to the subject DN</td>
<td>Enables the user creation page to default to certificate-based authorization and use the subject distinguished name (DN) from their user certificate as the user name.</td>
</tr>
<tr>
<td>Active Directory Integration</td>
<td>• <strong>Automatically assign permission for user login with an AD certificate</strong> — Select to allow certificate-based authentication at logon for users with active directory certification.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Automatically create user for AD certificate owners</strong> — Select to allow certificate-based authentication automatically for users with active directory certification.</td>
</tr>
</tbody>
</table>
When to use client certificate authentication

Client certificate authentication is the most secure method available. However, it is not the best choice for all environments.

Client certificate authentication is an extension of public-key authentication. It uses public keys as a basis, but differs from public-key authentication in that you only need to trust a trusted third party known as a certification authority (or CA). Certificates are digital documents containing a combination of identity information and public keys, and are digitally signed by the CA who verifies that the information is accurate.

Advantages of certificate-based authentication

Certificate-based authentication has a number of advantages over password authentication:

- Certificates have predefined lifetimes. This allows for a forced, periodic review of a user’s permissions when their certificate expires.
- If a user’s access must be suspended or terminated, the certificate can be added to a certificate revocation list, or CRL, which is checked on each logon attempt to prevent unauthorized access.
- Certificate authentication is more manageable and scalable in large institutions than other forms of authentication because only a small number of CAs (frequently only one) must be trusted.

Disadvantages of certificate-based authentication

Not every environment is best for certificate-based authentication. Disadvantages of this method include:

- A public-key infrastructure is required. This can add additional cost that in some cases may not be worth the additional security.
- Requires additional work to maintain certificates compared to password-based authentication.

Configure ePolicy Orchestrator client certificate authentication

Before users can log on with certificate authentication, ePolicy Orchestrator must be configured properly.

Before you begin

You must have already received a signed certificate in P7B, PKCS12, DER, or PEM format.

Task

1. Click Menu | Configuration | Server Settings.
2. Select Certificate Based Authentication and click Edit.
3. Select Enable Certificate Based Authentication.
4. Click Browse next to CA certificate for client certificate (P7B, PEM).
5. Navigate to and select the certificate file, then click OK.
6. If you have a Certificate Revoked List (CRL) file, click Browse next to this edit box, navigate to the CRL file, and click OK.
7. Click Save to save all changes.
8. Restart ePolicy Orchestrator to activate certificate authentication.
Modify ePolicy Orchestrator server certificate-based authentication

Servers require certificates for SSL connections provide higher security than standard HTTP sessions.

**Before you begin**
To upload a signed certificate, you must have already received a server certificate from a Certificate Authority (CA).

It is possible to create self-signed certificates instead of using externally signed ones, though this carries slightly higher risk. This task can be used to initially configure certificate-based authentication, or modify an existing configuration with an updated certificate.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Server Settings.**
2. Select **Certificate Based Authentication** and click **Edit.**
3. Select **Enable Certificate Based Authentication.**
4. Click **Browse** next to **CA certificate for client certificate.** Navigate to and select the certificate file and click **OK.**
   - Once a file has been applied the prompt changes to **Replace current CA certificate.**
5. If you have provided a PKCS12 certificate file, enter a password.
6. If you want to provide a Certificate Revoked List (CRL) file, click **Browse** next to **Certificate Revoked List file (PEM).** Navigate to and select the CRL file and click **OK.**
   - The CRL file must be in PEM format.
7. Select any advanced settings, if needed.
8. Click **Save** to save all changes.
9. Restart the server to enable the Certificate Based Authentication settings changes.

Disable ePolicy Orchestrator server client certificate authentication

Server certificates can and should be disabled if they are no longer used.

**Before you begin**
The server must already be configured for client certificate authentication before you can disable server certificates.

Once a server certificate is uploaded it can only be disabled, not removed.

**Task**
For option definitions, click ? in the interface.

1. Open the Server Settings page by selecting **Menu | Configuration | Server Settings.**
2. Select **Certificate Based Authentication** and click **Edit.**
3. Deselect **Enable Certificate Based Authentication,** then click **Save.**
The server settings have been changed, but you must restart the server in order to complete the configuration change.

**Configure users for certificate authentication**

Users must have certificate authentication configured before they can authenticate with their digital certificate. Certificates used for user authentication are typically acquired with a smart card or similar device. Software bundled with the smart card hardware can extract the certificate file. This extracted certificate file is usually the file uploaded in this procedure.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | User Management | Users.
2. Select a user and click Actions | Edit.
3. Select Change authentication or credentials, then select Certificate Based Authentication.
4. Use one of these methods to provide credentials.
   - Copy the DN field from the certificate file and paste it into the Personal Certificate Subject DN Field edit box.
   - Upload the certificate file that was signed using the CA certificate uploaded in the section Configure ePolicy Orchestrator certificate authentication. Click Browse, navigate to and select the certificate file on your computer, and click OK.

   User certificates can be PEM- or DER-encoded. The actual certificate format does not matter as long as the format is X.509 or PKCS12 compliant.
5. Click Save to save changes to the user's configuration.

The certificate information provided is verified, and a warning is issued if found invalid. From this point on, when the user attempts to log on to ePolicy Orchestrator from a browser that has the user's certificate installed, the logon form is grayed out and the user is immediately authenticated.

**Update CRL file**

You can update the Certificate Revoked List (CRL) file installed on your McAfee ePO server to stop access to ePolicy Orchestrator by specific users.

**Before you begin**

You must already have a CRL file in ZIP or PEM format.

The CRL file is a list of revoked ePolicy Orchestrator users and their digital certificate status. The list includes the revoked certificates, reason(s) for revocation, dates of certificate issue, and the issuing entity. When a user tries to access the McAfee ePO server, the CRL file is checked and it allows or denies access for that user.

**Task**

1. Click Menu | Configuration | Server Settings.
2. Select Certificate Based Authentication and click Edit.
3. To update the Certificate Revoked List file, click Browse next to this edit box, navigate to the CRL file, and click OK.
4. Click Save to save all changes.
5 Restart ePolicy Orchestrator to activate certificate authentication.

You can also use the cURL command line to update the CRL file. For example, at the cURL command line type:

```
To run cURL commands from the command line, you must have curl installed and remote access to the McAfee ePO server. See ePolicy Orchestrator 5.0.0 Scripting Guide for cURL download details and other examples.
```

```
curl -k --cert <admin_cert>.pem --key <admin_key>.pem https://<localhost>:<port>/remote/console.cert.updatecrl.do -F crlFile=@<crls>.zip
```

In this command:
- `<admin_cert>` — Administrator client certificate .PEM file name
- `<admin_key>` — Administrator client private key .PEM file name
- `<localhost>:<port>` — McAfee ePO server name and communication port number
- `<crls>` — CRL .PEM or .zip file name

Now the new CRL file is checked every time a user accesses the McAfee ePO server to confirm the certificate authentication has not been revoked.

**Problems with client certificate authentication**

Most authentication issues using certificates are caused by one of a small number of problems.

If a user cannot log on to ePolicy Orchestrator with their certificate, try one of the following options to resolve the problem:

- Verify the user has not been disabled.
- Verify the certificate has not expired or been revoked.
- Verify the certificate is signed with the correct certificate authority.
- Verify the DN field is correct on the user configuration page.
- Verify the browser is providing the correct certificate.
- Check the audit log for authentication messages.

**SSL certificates**

The browsers supported by McAfee ePO show a warning about a server’s SSL certificate if it cannot verify that the certificate is valid or signed by a source that the browser trusts. By default, the McAfee ePO server uses a self-signed certificate for SSL communication with the web browser, which, by default, the browser will not trust. This causes a warning message to display every time you visit the McAfee ePO console.

To stop this warning message from appearing you must do one of the following:

- Add the McAfee ePO server certificate to the collection of trusted certificates used by the browser.

This must be done for every browser that interacts with McAfee ePO. If the browser certificate changes, you must add the McAfee ePO server certificate again since the certificate sent by the server no longer matches the one that the browser is configured to use.
• Replace the default McAfee ePO server certificate with a valid certificate that has been signed by a certificate authority (CA) that the browser trusts. This is the best option. Because the certificate is signed by a trusted CA, you do not need to add the certificate to all web browsers within your organization.

If the server host name changes, you can replace the server certificate with a different one that has also been signed by a trusted CA.

To replace the McAfee ePO server certificate, you must first obtain the certificate — preferably a certificate that has been signed by a trusted CA. You must also obtain the certificate’s private key and its password (if it has one). Then you can use all of these files to replace the server’s certificate. For more information on replacing server certificates, see Security keys and how they work.

The McAfee ePO browser expects the linked files to use the following format:
• Server certificate — P7B or PEM
• Private key — PEM

If the server certificate or private key are not in these formats, they must be converted to one of the supported formats before they can be used to replace the server certificate.

Replace the server certificate
You can specify the server certificate and private key used by ePolicy Orchestrator from Server Settings.

Task
For option definitions, click ? in the interface.
1. Click Menu | Configuration | Server Settings, then click Server Certificate in the Settings Categories list.
2. Click Edit. The Edit Server Certificate page appears.
3. Browse to the server certificate file and click Open.
4. Browse to the private key file and click Open.
5. If needed, type the private key password.
6. Click Save.

After applying the new certificate and private key, you need to restart ePolicy Orchestrator for the change to take effect.

Install a trusted security certificate for the McAfee ePO browser
You can install a trusted security certificate for your McAfee ePO browser, to stop the server certificate warning from appearing every time you log on.

Tasks
• Install the security certificate when using Internet Explorer on page 53
  You can install the security certificate when using supported versions of Internet Explorer, so that the warning dialog box won’t appear every time you log on.
• Install the security certificate when using Firefox 3.5 or higher on page 53
  You can install the security certificate when using Firefox 3.5 or higher, so that the warning dialog box won’t appear every time you log on.
Install the security certificate when using Internet Explorer
You can install the security certificate when using supported versions of Internet Explorer, so that the warning dialog box won’t appear every time you log on.

Task
2. Click Continue to this website (not recommended) to open the logon page. The address bar is red, indicating the browser cannot verify the security certificate.
3. To the right of the address bar, click Certificate Error to display the Certificate Invalid warning.
4. At the bottom of the warning, click View certificates to open the Certificate dialog box.
   ![Do not click Install Certificate on the General tab. If you do, the process fails.]
5. Select the Certification Path tab, then select Orion_CA_<servername>, and click View Certificate. Another Certificate dialog box opens to the General tab, displaying the Certificate Information.
6. Click Install certificate to open the Certificate Import Wizard.
7. Click Next to specify where the certificate is stored.
8. Select Place all certificates in the following store, then click Browse to select a location.
9. Select the Trusted Root Certificate Authorities folder from the list, click OK, then click Next.
10. Click Finish. In the Security Warning that appears, click Yes.
11. Close the browser.
12. Change the target of the ePolicy Orchestrator desktop shortcut to use the NetBIOS name of the ePolicy Orchestrator server instead of "localhost".

Now when you log on to ePolicy Orchestrator, you are no longer prompted to accept the certificate.

Install the security certificate when using Firefox 3.5 or higher
You can install the security certificate when using Firefox 3.5 or higher, so that the warning dialog box won’t appear every time you log on.

Task
1. From your browser, start ePolicy Orchestrator. The Secure Connection Failed page appears.
2. Click Or you can add an exception at the bottom of the page. The page now displays the Add Exception button.
3. Click Add Exception. The Add Security Exception dialog appears.
4. Click Get Certificate. The Certification Status information is populated and the Confirm Security Exception button is enabled.
5. Make sure that Permanently store this exception is selected, then click Confirm Security Exception.

Now when you log on to ePolicy Orchestrator, you are no longer prompted to accept the certificate.
Create a self-signed certificate with OpenSSL

There are times when you might not be able to, or want to, wait for a certificate to be authenticated by a certification authority. During initial testing or for systems used on internal networks a self-signed certificate can provide the basic security and functionality needed.

Before you begin
To create a self-signed certificate, you need to install the OpenSSL for Windows software. OpenSSL is available from:

http://www.slproweb.com/products/Win32OpenSSL.html

To create and self-sign a certificate to use with your McAfee ePO server use OpenSSL for Windows software.

There are many tools you can use to create a self-sign a certificate. This task describes the process using OpenSSL.

The file structure used in the following task is:

- C:\ssl - Installation folder for OpenSSL
- C:\ssl\certs - Used to store the certificates created
- C:\ssl\keys - Used to store the keys created
- C:\ssl\requests - Used to store the certification requests created.

Task
1. To generate the initial certificate key, type the following command at the command line:

C:\ssl\bin>openssl genrsa -des3 -out C:/ssl/keys/ca.key 1024

The following screen appears.

Loading 'screen' into random state - done
Generating RSA private key, 1024 bit long modulus
.................................................................+++++
+............. unable to write 'random state'
e is 65537 (0x10001)
Enter pass phrase for keys/ca.key:
Verifying - Enter pass phrase for keys/ca.key:

C:\ssl\bin>
2. Enter a pass phrase at the initial command prompt and verify the pass phrase at the second command prompt.

   Make a note of the pass phrase you enter. You need it later in the process.

The file names ca.key is generated and stored in the path C:\ssl\keys\.

The key looks similar to the following example.

```
-----BEGIN RSA PRIVATE KEY-----
Proc-Type: 4,ENCRYPTED
DEK-Info: DES-EDE3-CBC,C7327E8D51D0188

4Ev9hFtKo660WY0cB60a8uBc0TOn/cdppSeykPQ8AasEHFteF+Hbort8Kks
b9wDAAcZf6Sd8mzo8bi9m57X/FZ+7dcTH7YyKXskfoqED7/VZXktAEhA1Vw+wj
.
.
.im2EkbLWQ3kI+6Hde0UoOFw99BoH2i3vAVU6F6lDbUNULLp9e3wv5eIN1600fAF9C3
4+flxItRbFr3piLpCMX+6L1Dpd0gSCFY723ZI0rrOwugh6yD10dE94w==
-----END RSA PRIVATE KEY-----
```

3. To self-sign the certificate key you created, type the following command at the command line:

   openssl req -new -x509 -days 365 -key C:/ssl/keys/ca.key -out C:/ssl/certs/ca.cer

The following screen appears.

```
Enter pass phrase for ca.key:
Loading 'screen' into random state - done
You are about to be asked to enter information that will be incorporated
into your certificate request.
What you are about to enter is what is called a Distinguished
Name or a DN.
There are quite a few fields but you can leave some blank
For some fields there will be a default value,
If you enter '.' the field will be left blank.
-----
Country Name [2 letter code] [AU]:US
State or Province Name [full name] [Some-State]:Oregon
Locality Name (eg, city) [ ]:Beaverton
Organization Name (eg, company) [Internet Widgits Pty Ltd]:McAfee
Organizational Unit Name (eg, section) [ ]:Enterprise
Common Name (eg, YOUR name) [ ]:ePO_Server
Email Address [ ]:tester@mcafee.com

C:\ssl\bin>
```

Type the information needed after the following command prompts:

- Country Name (2 letter code) [AU]:
- State or Province Name (full name) [Some-State]:
- Locality Name (eg, city) []:
- Organization Name (eg, company) [Internet Widgits Pty Ltd]:
- Organizational Unit Name (eg, section) []:
• Common Name (eg, YOUR name) []:
  
  At this command prompt, type the name of your server, for example your McAfee ePO server name.

• Email Address []:

  The file named ca.cer is generated and stored in the path C:\ssl\certs\.

  The self-signed certificate looks similar to the following example.

  ------BEGIN CERTIFICATE------
  MIIDtTCCAt6gAwIBAgIJAJe1d+Ih0GDMADQCSqGSIb3DQEJEAMIGEMQswCQYD
  VQQGEwJVUzEFMAoGA1UECzMGSTM1JFR090MRkwEAYDVQQHEw1CRUFRVJUT04x
  ------END CERTIFICATE------

  To have a third party, for example VeriSign or Microsoft Windows Enterprise Certificate Authority, create a signed certificate for ePolicy Orchestrator, see KnowledgeBase article KB72477.

4 To upload and manage the certificate on the ePolicy Orchestrator server, see Configuring ePolicy Orchestrator for certificate authentication.

Other useful OpenSSL commands

You can use other OpenSSL commands to extract and combine the keys in generated PKCS12 certificates and to convert a password protected private key PEM file to a non-password protected file.

Commands to use with PKCS12 certificates

Use the following commands to create a PKCS12 certificate with both the certificate and key in one file.

<table>
<thead>
<tr>
<th>Description</th>
<th>OpenSSL command format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a certificate and key in one file</td>
<td>openssl req -x509 -nodes -days 365 -newkey rsa:1024 -config path\openssl.cnf -keyout path\pkcs12Example.pem -out path\pkcs12Example.pem</td>
</tr>
<tr>
<td>Export the PKCS12 version of the certificate</td>
<td>openssl pkcs12 -export -out path\pkcs12Example.pfx -in path\pkcs12Example.pem -name &quot;user_name_string&quot;</td>
</tr>
</tbody>
</table>

Use the following commands to separate the certificate and key from a PKCS12 certificate with them combined.

<table>
<thead>
<tr>
<th>Description</th>
<th>OpenSSL command format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extracts the .pem key out of .pfx</td>
<td>openssl pkcs12 -in pkcs12ExampleKey.pfx -out pkcs12ExampleKey.pem</td>
</tr>
<tr>
<td>Removes password on key</td>
<td>openssl rsa -in pkcs12ExampleKey.pem -out pkcs12ExampleKeyNoPW.pem</td>
</tr>
</tbody>
</table>

The ePolicy Orchestrator can then use the pkcs12ExampleCert.pem as the certificate and the pkcs12ExampleKey.pem as the key (or the key without a password pkcs12ExampleKeyNoPW.pem).
Command to convert a password protected private key PEM file

To convert a password protected private key PEM file to a non-password protected file, type:

```bash
openssl rsa -in C:\ssl\keys\key.pem -out C:\ssl\keys\keyNoPassword.pem
```

In the previous example, "C:\ssl\keys" is the input and output paths for the file names "key.pem" and "keyNoPassword.pem".

Convert an existing PVK file to a PEM file

The ePolicy Orchestrator browser supports PEM-encoded private keys. This includes both password protected and non-password protected private keys. Using OpenSSL you can convert a PVK-formatted key to a PEM format.

**Before you begin**

To convert the PVK formatted file, install the OpenSSL for Windows software. This is available from:

http://www.slproweb.com/products/Win32OpenSSL.html

Using the OpenSSL for Windows software, convert your PVK format certificate to PEM format.

**Task**

1. To convert a previously created PVK file to a PEM file, type the following at the command line:

```bash
openssl rsa -inform PVK -outform PEM -in C:\ssl\keys\myPrivateKey.pvk -out C:\ssl\keys\myPrivateKey.pem -passin pass:p@$$w0rd -passout pass:p@$$w0rd
```

   In the previous example, "-passin" and "-passout" arguments are optional.

2. If prompted, type the password used when you originally created the PVK file.
   If the "-passout" argument is not used in the previous example, the newly created PEM-formatted key is not password protected.

Client certificate authentication

Clients can use a digital certificate as authentication credentials when they log on to a McAfee ePO server.

Permission sets

Permission sets control the level of access users have to the features available in the software.

Even the smallest of ePolicy Orchestrator installations needs to specify and control the access users have to different parts of the system.

Contents

- How users, groups, and permission sets fit together
- Work with permission sets
How users, groups, and permission sets fit together

Access to items within ePolicy Orchestrator is controlled by interactions between users, groups, and permission sets.

Users

Users fall into two general categories. Either they are administrators, having full rights throughout the system, or they are regular users. Regular users can be assigned any number of permission sets to define their access levels within ePolicy Orchestrator.

User accounts can be created and managed in several ways. You can:

• Create user accounts manually, then assign each account an appropriate permission set.
• Configure your ePolicy Orchestrator server to allow users to log on using Windows authentication.

Allowing users to log on using their Windows credentials is an advanced feature that requires configuration and set up of multiple settings and components. For more information on this option, see Managing ePolicy Orchestrator users with Active Directory.

While user accounts and permission sets are closely related, they are created and configured using separate steps. For more information on permission sets, see Manage permission sets.

Administrators

Administrators have read and write permissions and rights to all operations. When you install the server, an administrator account is created automatically. By default, the user name for this account is admin. If the default value is changed during installation, this account is named accordingly.

You can create additional administrator accounts for people who require administrator rights.

Permissions exclusive to administrators include:

• Create, edit, and delete source and fallback sites.
• Change server settings.
• Add and delete user accounts.
• Add, delete, and assign permission sets.
• Import events into ePolicy Orchestrator databases and limit events that are stored there.

Groups

Queries and reports are assigned to groups. Each group can be private (to that user only), globally public (or “shared”), or shared to one or more permission sets.

Permission sets

A particular access profile is defined within a permission set. This usually involves a combination of access levels to various parts of ePolicy Orchestrator. For example, a single permission set might grant the ability to read the Audit log, use public and shared dashboards, and create and edit public reports or queries.

Permission sets can be assigned to individual users, or if you are using Active Directory, to all users from specific Active Directory servers.
Work with permission sets
You can control user access, create and modify permission sets from the Permission Sets page.

Tasks

• Manage Permission Sets on page 59
  You can control user access, create, modify, export and import permission sets from the Permission Sets page.

• Export and import permission sets on page 61
  Once you have fully defined your permission sets, the fastest way to migrate them to other McAfee ePO servers is to export them to the other servers.

Manage Permission Sets
You can control user access, create, modify, export and import permission sets from the Permission Sets page.

  Once you have fully defined your permission sets, the fastest way to migrate them to other ePolicy Orchestrator servers is to export them and import them onto other servers.

Task
For option definitions, click ? in the interface.

1  To open the permission sets page, click Menu | User Management | Permission Sets.

2  Select one of these actions.
<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| **Create new permission set.** | 1. Click Actions | New.  
2. Type a name for the new permission set.  
ePolicy Orchestrator does not allow you to use an existing name. Each permission set name must be unique.  
3. If you want to immediately assign specific users to this permission set, select their user names in the Users section.  
4. If there are any Active Directory groups where you want all users from that group mapped to this permission set, select the server from the Server Name list and click Add.  
5. If you have added any Active Directory servers you want to remove, select them in the Active Directory list box and click Remove.  
6. Click Save to create the permission set.  
At this point, you have created the permission set but you have not yet assigned permissions to it. |
| **Modify existing permission set.** | 1. Select a permission set to modify. Its details appear to the right.  
If you have just created a new permission set, the newly-created permission set is already selected for you.  
2. Select a category of permissions to modify by clicking Edit in that category's row.  
The options appropriate to the selected permissions category appear.  
3. Change the permissions as desired, and click Save.  
This commits the changes to the permission set into the database.  
**You don't need to click Save when you complete modifying the permission set. The changes are saved for you when modifying each individual category. The changes you make are immediately reflected in the system, and are propagated to the remainder of your network according to your policy configuration.** |
| **Duplicate permission set.** | 1. Select a permission set to duplicate from the Permission Sets list and click Actions | Duplicate.  
2. Type a new name for the duplicate permission set. By default, ePolicy Orchestrator appends (copy) to the existing name.  
ePolicy Orchestrator does not allow you to use an existing name. Each permission set name must be unique.  
3. Click OK.  
The permission set is duplicated, but the original is still selected in the Permission Sets list. |
| **Delete permission set.** | 1. Select the permission set you want to delete from the Permission Sets list. Its details appear to the right.  
2. Click Actions | Delete and click OK in the Action pane.  
The permission set no longer appears in the Permission Sets list. |
### Export permission set.

1. Select the permission set(s) you want to export.
2. Click **Permission Sets Actions | Export All**.

The McAfee ePO server sends an XML file to your browser. What happens next depends on your browser settings. By default, most browsers ask you to save the file.

- The XML file only contains roles with some level of permission defined. If, for example, a particular permission set has no permissions for queries and reports, no entry appears in the file.

### Import permission set.

1. Select the permission set(s) you want to import.
2. Click **Browse** to navigate to and select the XML file containing the permission set you want to import.
3. Choose whether you want to keep permission sets with the same name as an imported permission set or not by selecting the appropriate option. Click **OK**.

If ePolicy Orchestrator cannot locate a valid permission set within the indicated file, an error message is displayed and the import process is aborted.

The permission sets are added to the server and displayed in the **Permission Sets** list.

---

### Export and import permission sets

Once you have fully defined your permission sets, the fastest way to migrate them to other McAfee ePO servers is to export them to the other servers.

**Task**

For option definitions, click ![help](? in the interface.

1. To open the permission sets page, click **Menu | User Management | Permission Sets**.
2. Select one of these actions.
### Action | Steps
--- | ---
Export permission set. | 1 Select the permission set(s) you want to export.  
2 Click **Permission Sets Actions** | Export All.  
The McAfee ePO server sends an XML file to your browser. What happens next depends on your browser settings. By default, most browsers ask you to save the file.  

The XML file only contains roles with some level of permission defined. If, for example, a particular permission set has no permissions for queries and reports, no entry appears in the file.

---

Import permission set. | 1 Select the permission set(s) you want to import.  
2 Click **Browse** to navigate to and select the XML file containing the permission set you want to import.  
3 Choose whether you want to keep permission sets with the same name as an imported permission set or not by selecting the appropriate option. Click **OK**.  
If ePolicy Orchestrator cannot locate a valid permission set within the indicated file, an error message is displayed and the import process is aborted.  
The permission sets are added to the server and displayed in the **Permission Sets** list.
Repositories

Repositories house your security software packages and their updates for distribution to your managed systems.

Security software is only as effective as the latest installed updates. For example, if your DAT files are out-of-date, even the best anti-virus software cannot detect new threats. It is critical that you develop a robust updating strategy to keep your security software as current as possible.

The ePolicy Orchestrator repository architecture offers flexibility to ensure that deploying and updating software is as easy and automated as your environment allows. Once your repository infrastructure is in place, create update tasks that determine how, where, and when your software is updated.

Contents

- Repository types and what they do
- How repositories work together
- Setting up repositories for the first time
- Manage source and fallback sites
- Verify access to the source site
- Configure settings for global updates
- Configure agent policies to use a distributed repository
- Use SuperAgents as distributed repositories
- Create and configure repositories on FTP or HTTP servers and UNC shares
- Use local distributed repositories that are not managed
- Work with the repository list files

Repository types and what they do

To deliver products and updates throughout your network, ePolicy Orchestrator software offers several types of repositories that create a robust infrastructure for updating. These repositories give you the flexibility to develop an updating strategy to make sure your systems are always current.

Master repository

The master repository maintains the latest versions of security software and updates for your environment. This repository is the source for the rest of your environment.

> By default, ePolicy Orchestrator uses Microsoft Internet Explorer proxy settings.

Distributed repositories

Distributed repositories host copies of your master repository’s contents. Consider using distributed repositories and placing them throughout your network strategically to ensure managed systems are updated while network traffic is minimized, especially across slow connections.
As you update your master repository, ePolicy Orchestrator replicates the contents to the distributed repositories.

Replication can occur:

- Automatically when specified package types are checked in to the master repository, as long as global updating is enabled.
- On a recurring schedule with Replication tasks.
- Manually, by running a Replicate Now task.

A large organization can have multiple locations with limited bandwidth connections between them. Distributed repositories help reduce updating traffic across low bandwidth connections, or at remote sites with a large number of client systems. If you create a distributed repository in the remote location and configure the systems within that location to update from this distributed repository, the updates are copied across the slow connection only once — to the distributed repository — instead of once to each system in the remote location.

If global updating is enabled, distributed repositories update managed systems automatically, as soon as selected updates and packages are checked in to the master repository. Update tasks are not necessary. However, you do need to be running SuperAgents in your environment if you want automatic updating. You must still create and configure repositories and the update tasks.

If distributed repositories are set up to replicate only selected packages, your newly checked-in package is replicated by default. To avoid replicating a newly checked-in package, deselect it from each distributed repository or disable the replication task before checking in the package. For additional information, see Avoiding replication of selected packages and Disabling replication of selected packages.

- Do not configure distributed repositories to reference the same directory as your master repository. Doing so causes the files on the master repository to become locked by users of the distributed repository, which can cause pulls and package check-ins to fail and leave the master repository in an unusable state.

**Source site**

The source site provides all updates for your master repository. The default source site is the McAfeeHttp update site, but you can change the source site or create multiple source sites if you require. McAfee recommends using the McAfeeHttp or McAfeeFtp update sites as your source site.

Source sites are not required. You can download updates manually and check them in to your master repository. However, using a source site automates this process.

McAfee posts software updates to these sites regularly. For example, DAT files are posted daily. Update your master repository with updates as they are available.

Use pull tasks to copy source site contents to the master repository.

McAfee update sites provide updates to detection definition (DAT) and scanning engine files, as well as some language packs. You must check in all other packages and updates, including service packs and patches, to the master repository manually.

**Fallback site**

The fallback site is a source site that’s been enabled as the backup site, from which managed systems can retrieve updates when their usual repositories are inaccessible. For example, when network outages or virus outbreaks occur, accessing the established location might be difficult. Therefore, managed systems can remain up-to-date in such situations. The default fallback site is the McAfeeHttp update site. You can enable only one fallback site.
If managed systems use a proxy server to access the Internet, you must configure agent policy settings for those systems to use proxy servers when accessing this fallback site.

**Types of distributed repositories**

The ePolicy Orchestrator software supports four types of distributed repositories. Consider your environment and needs when determining which type of distributed repository to use. You are not limited to using one type, and might need several, depending on your network.

**SuperAgent repositories**

Use systems hosting SuperAgents as distributed repositories. SuperAgent repositories have several advantages over other types of distributed repositories:

-Folder locations are created automatically on the host system before adding the repository to the repository list.
- SuperAgent repositories don’t require additional replication or updating credentials — account permissions are created when the agent is converted to a SuperAgent.

Although functionality of SuperAgent broadcast wake-up calls requires a SuperAgent in each broadcast segment, this is not a requirement for functionality of the SuperAgent repository. Managed systems only need to have access to the system hosting the repository.

**FTP repositories**

You can use an FTP server to host a distributed repository. Use FTP server software, such as Microsoft Internet Information Services (IIS), to create a new folder and site location for the distributed repository. See your web server documentation for details.

**HTTP repositories**

You can use an HTTP server to host a distributed repository. Use HTTP server software, such as Microsoft IIS, to create a new folder and site location for the distributed repository. See your web server documentation for details.

**UNC share repositories**

You can create a UNC shared folder to host a distributed repository on an existing server. Be sure to enable sharing across the network for the folder, so that the McAfee ePO server can copy files to it and agents can access it for updates.

The correct permissions must be set to access the folder.

**Unmanaged repositories**

If you are unable to use managed distributed repositories, ePolicy Orchestrator administrators can create and maintain distributed repositories that are not managed by ePolicy Orchestrator.

If a distributed repository is not managed by ePolicy Orchestrator, a local administrator must keep the distributed files up-to-date manually.
Once the distributed repository is created, use ePolicy Orchestrator to configure managed systems of a specific System Tree group to update from it.

See *Enabling the agent on unmanaged McAfee products so that they work with ePolicy Orchestrator* for configuration of unmanaged systems.

McAfee recommends that you manage all distributed repositories through ePolicy Orchestrator. This recommendation, and using global updating or scheduling replication tasks frequently, ensures your managed environment is up-to-date. Use unmanaged distributed repositories only if your network or organization's policy doesn't allow managed distributed repositories.

### Repository branches and their purposes

You can use the three ePolicy Orchestrator repository branches to maintain up to three versions of the packages in your master and distributed repositories.

The repository branches are Current, Previous, and Evaluation. By default, ePolicy Orchestrator uses only the Current branch. You can specify branches when adding packages to your master repository. You can also specify branches when running or scheduling update and deployment tasks, to distribute different versions to different parts of your network.

Update tasks can retrieve updates from any branch of the repository, but you must select a branch other than the Current branch when checking in packages to the master repository. If a non-Current branch is not configured, the option to select a branch other than Current does not appear.

To use the Evaluation and Previous branches for packages other than updates, you must configure this in the Repository Packages server settings. Agent versions 3.6 and earlier can retrieve update packages only from the Evaluation and Previous branches.

#### Current branch

The Current branch is the main repository branch for the latest packages and updates. Product deployment packages can be added only to the Current branch, unless support for the other branches has been enabled.

#### Evaluation branch

You might want to test new DAT and engine updates with a small number of network segments or systems before deploying them to your entire organization. Specify the Evaluation branch when checking in new DATs and engines to the master repository, then deploy them to a small number of test systems. After monitoring the test systems for several hours, you can add the new DATs to your Current branch and deploy them to your entire organization.

#### Previous branch

Use the Previous branch to save and store prior DAT and engine files before adding the new ones to the Current branch. In the event that you experience an issue with new DAT or engine files in your environment, you have a copy of a previous version that you can redeploy to your systems if necessary. ePolicy Orchestrator saves only the most immediate previous version of each file type.

You can populate the Previous branch by selecting *Move existing packages to Previous branch* when you add new packages to your master repository. The option is available when you pull updates from a source site and, when you manually check in packages to the Current branch.
Repository list file and its uses
The repository list (SiteList.xml and SiteMgr.xml) file contains the names of all the repositories you are managing.

The repository list includes the location and encrypted network credentials that managed systems use to select the repository and retrieve updates. The server sends the repository list to the agent during agent-server communication.

If needed, you can export the repository list to external files (SiteList.xml or SiteMgr.xml).

Use an exported SiteList.xml file to:
• Import to an agent during installation.

Use an exported SiteMgr.xml file to:
• Backup and restore your distributed repositories and source sites if you need to reinstall the server.
• Import the distributed repositories and source sites from a previous installation of the ePolicy Orchestrator software.

How repositories work together
The repositories work together in your environment to deliver updates and software to managed systems. Depending on the size and geographic distribution of your network, you might need distributed repositories.

Figure 6-1  Sites and repositories delivering packages to systems
1 The master repository regularly pulls DAT and engine update files from the source site.
2 The master repository replicates the packages to distributed repositories in the network.
3 The managed systems in the network retrieve updates from a distributed repository. If managed systems can’t access the distributed repositories or the master repository, they retrieve updates from the fallback site.
Setting up repositories for the first time

Follow these high-level steps when creating repositories for the first time.
1. Decide which types of repositories to use and their locations.
2. Create and populate your repositories.

Manage source and fallback sites

You can change the default source and fallback sites from the Server Settings. For example, you can edit settings, delete existing source and fallback sites, or switch between them.

You must be an administrator or have appropriate permissions to define, change, or delete source or fallback sites.

McAfee recommends using the default source and fallback sites. If you require different sites for this purpose, you can create new ones.

Tasks

- **Create source sites on page 68**
  Create a new source site from Server Settings.
- **Switch source and fallback sites on page 69**
  Use Server Settings to change source and fallback sites.
- **Edit source and fallback sites on page 69**
  Use Server Settings to edit the settings of source or fallback sites, such as URL address, port number, and download authentication credentials.
- **Delete source sites or disabling fallback sites on page 70**
  If a source or fallback site is no longer in use, delete or disable the site.

Create source sites

Create a new source site from Server Settings.

Task

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, then select Source Sites.
2. Click Add Source Site. The Source Site Builder wizard appears.
3. On the Description page, type a unique repository name and select HTTP, UNC, or FTP, then click Next.
4. On the Server page, provide the web address and port information of the site, then click Next.

**HTTP or FTP server type:**

- From the URL drop-down list, select DNS Name, IPv4, or IPv6 as the type of server address, then enter the address.

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>Specifies the DNS name of the server.</td>
</tr>
<tr>
<td>IPv4</td>
<td>Specifies the IPv4 address of the server.</td>
</tr>
<tr>
<td>IPv6</td>
<td>Specifies the IPv6 address of the server.</td>
</tr>
</tbody>
</table>

- Enter the port number of the server: FTP default is 21; HTTP default is 80.
UNC server type:
- Enter the network directory path where the repository resides. Use this format: \\<COMPUTER>\<FOLDER>.

5 On the Credentials page, provide the Download Credentials used by managed systems to connect to this repository.
Use credentials with read-only permissions to the HTTP server, FTP server, or UNC share that hosts the repository.

HTTP or FTP server type:
- Select Anonymous to use an unknown user account.
- Select FTP or HTTP authentication (if the server requires authentication), then enter the user account information.

UNC server type:
- Enter domain and user account information.

6 Click Test Credentials. After a few seconds, a confirmation message appears that the site is accessible to systems using the authentication information. If credentials are incorrect, check the:
  - User name and password.
  - URL or path on the previous panel of the wizard.
  - The HTTP, FTP or UNC site on the system.

7 Click Next.

8 Review the Summary page, then click Save to add the site to the list.

Switch source and fallback sites
Use Server Settings to change source and fallback sites.
Depending on your network configuration, you might want to switch the source and fallback sites if you find that HTTP or FTP updating works better.
For option definitions, click ? in the interface.

Task
1 Click Menu | Configuration | Server Settings.
2 Select Source Sites, then click Edit. The Edit Source Sites page appears.
3 From the list, locate the site that you want to set as fallback, then click Enable Fallback.

Edit source and fallback sites
Use Server Settings to edit the settings of source or fallback sites, such as URL address, port number, and download authentication credentials.
For option definitions, click ? in the interface.

Task
1 Click Menu | Configuration | Server Settings.
2 Select Source Sites, then click Edit. The Edit Source Sites page appears.
3 Locate the site in the list, then click on the name of the site.
   The Source Site Builder wizard opens.

4 Edit the settings on the wizard pages as needed, then click Save.

Delete source sites or disabling fallback sites
If a source or fallback site is no longer in use, delete or disable the site.
For option definitions, click ? in the interface.

Task
1 Click Menu | Configuration | Server Settings.
2 Select Source Sites, then click Edit. The Edit Source Sites page appears.
3 Click Delete next to the required source site. The Delete Source Site dialog box appears.
4 Click OK.
   The site is removed from the Source Sites page.

Verify access to the source site
You must make sure that the ePolicy Orchestrator master repository, managed systems, and the McAfee Labs Security Threats dashboard monitor can access the Internet when using the McAfeeHttp and the McAfeeFtp sites as source and fallback sites.
This section describes the steps for configuring the ePolicy Orchestrator master repository, the McAfee Agent, and McAfee Labs Security Threats to connect to the download site directly or via a proxy. The default selection is Do not use proxy.

Tasks
- Configure proxy settings on page 70
  Configure proxy settings to pull DATs for updating your repositories and to update McAfee Labs Security Threats.
- Configure proxy settings for the McAfee Agent on page 71
  Configure the proxy settings the McAfee Agent uses to connect to the download site.
- Configure proxy settings for McAfee Labs Security Threats on page 72
  If you are not using the default ePolicy Orchestrator server settings, configure proxy settings for McAfee Labs Security Threats.

Configure proxy settings
Configure proxy settings to pull DATs for updating your repositories and to update McAfee Labs Security Threats.

Task
For option definitions, click ? in the interface.
1 Click Menu | Configuration | Server Settings.
   The Server Settings page appears.
2 From the list of setting categories, select Proxy Settings, then click Edit.
   The Edit Proxy Settings page appears.
Configure proxy settings for the McAfee Agent

Configure the proxy settings the McAfee Agent uses to connect to the download site.

Task
For option definitions, click ? in the interface.

1 Click Menu | Policy | Policy Catalog, then from the Product list click McAfee Agent, and from the Category list, select Repository.

A list of agents configured for the McAfee ePO server appears.

2 On the My Default agent, click Edit Settings.

The edit settings page for the My Default agent appears.

3 Click the Proxy tab.

The Proxy Settings page appears.

4 Select Use Internet Explorer settings (Windows only) for Windows systems, and select Allow user to configure proxy settings, if appropriate.

There are multiple methods to configuring Internet Explorer for use with proxies. McAfee provides instructions for configuring and using McAfee products, but does not provide instructions for non-McAfee products. For information on configuring proxy settings, see Internet Explorer Help and http://support.microsoft.com/kb/226473.

5 Select Configure the proxy settings manually to configure the proxy settings for the agent manually.

6 Type the IP address or fully-qualified domain name and the port number of the HTTP or FTP source where the agent pulls updates. Select Use these settings for all proxy types to make these settings the default settings for all proxy types.

7 Select Specify exceptions to designate systems that do not require access to the proxy. Use a semicolon to separate the exceptions.

8 Select Use HTTP proxy authentication or Use FTP proxy authentication, then provide a user name and credentials.

9 Click Save.
Configure proxy settings for McAfee Labs Security Threats

If you are not using the default ePolicy Orchestrator server settings, configure proxy settings for McAfee Labs Security Threats.

**Task**
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings.
2. Select Proxy Settings and click Edit.

   The Edit Proxy Settings page appears.

3. Select Configure the proxy settings manually.

4. Next to Proxy server settings, select whether to use one proxy server for all communication, or different proxy servers for HTTP and FTP proxy servers. Then type the IP address or fully-qualified domain name and the Port number of the proxy server.

   - If you are using the default source and fallback sites, or if you configure another HTTP source site and FTP fallback site, configure both HTTP and FTP proxy authentication information here.

5. Next to Proxy authentication, configure the settings as appropriate, depending on whether you pull updates from HTTP repositories, FTP repositories, or both.

6. Next to Exclusions, select Bypass Local Addresses, then specify any distributed repositories where the server can connect to directly by typing the IP addresses or fully-qualified domain name of those systems, separated by semicolons.

7. Click Save.

Configure settings for global updates

Global updates automate repository replication in your network. You can use the Global Updating server setting to configure the content that is distributed to repositories during a global update.

Global updates are disabled by default. However, McAfee recommends that you enable and use them as part of your updating strategy. You can specify a randomization interval and package types to be distributed during the update. The randomization interval specifies the time period in which all systems are updated. Systems are updated randomly within the specified interval.

**Task**
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Global Updating from the Setting Categories, then click Edit.

2. Set the status to Enabled and specify a Randomization interval between 0 and 32,767 minutes.
3 Specify which Package types to include in the global updates:
   • **All packages** — Select this option to include all signatures and engines, and all patches and Service Packs.
   • **Selected packages** — Select this option to limit the signatures and engines, and patches and Service Packs included in the global update.

When using global updating, McAfee recommends scheduling a regular pull task (to update the master repository) at a time when network traffic is minimal. Although global updating is much faster than other methods, it increases network traffic during the update. For more information about performing global updates, see *Global updating* under *Product and update deployment*.

## Configure agent policies to use a distributed repository

Customize how agents select distributed repositories to minimize bandwidth use.

**Task**

For option definitions, click `?` in the interface.

1. Click *Menu* | *Policy* | *Policy Catalog*, then select the *Product* as *McAfee Agent* and *Category* as *Repository*.
2. Click the required existing agent policy.
3. Select the Repositories tab.
4. From *Repository list selection*, select either *Use this repository list* or *Use other repository list*.
5. Under *Select repository by*, specify the method to sort repositories:
   - **Ping time** — Sends an ICMP ping to the closest five repositories (based on subnet value) and sorts them by response time.
   - **Subnet distance** — Compares the IP addresses of client systems and all repositories and sorts repositories based on how closely the bits match. The more closely the IP addresses resemble each other, the higher in the list the repository is placed.
   - **User order in repository list** — Selects repositories based on their order in the list.

   If needed you can set the *Maximum number of hops*.

6. From the Repository list, you can disable repositories by clicking *Disable* in the *Actions* field associated with the repository to be disabled.
7. In the Repository list, click *Move to Top* or *Move to Bottom* to specify the order in which you want client systems to select distributed repositories.
8. Click *Save* when finished.

## Use SuperAgents as distributed repositories

Create and configure distributed repositories on systems that host SuperAgents. SuperAgents can minimize network traffic.

In order to convert an agent to a SuperAgent, the agent must be part of a Windows domain.
Tasks

- **Create SuperAgent distributed repositories on page 74**
  To create a SuperAgent repository the desired system must have a McAfee ePO agent installed and running. McAfee recommends using SuperAgent repositories with global updating.

- **Replicate packages to SuperAgent repositories on page 74**
  Select which repository-specific packages are replicated to distributed repositories.

- **Delete SuperAgent distributed repositories on page 75**
  Remove SuperAgent distributed repositories from the host system and the repository list (SiteList.xml). New configurations take effect during the next agent-server communication.

Create SuperAgent distributed repositories

To create a SuperAgent repository the desired system must have a McAfee ePO agent installed and running. McAfee recommends using SuperAgent repositories with global updating.

This task assumes that you know where the desired systems are located in the System Tree. McAfee recommends that you create a SuperAgent tag so that you can easily locate the systems with the Tag Catalog page, or by running a query.

Task

For option definitions, click ? in the interface.

1. From the ePO console, click **Menu | Policy | Policy Catalog**, then from the **Product** list click **McAfee Agent**, and from the **Category** list, select **General**.
   A list of available general category policies available for use on your ePolicy Orchestrator server appears.

2. Create a new policy, duplicate an existing one, or open one that’s already applied to systems that hosts a SuperAgent where you want to host SuperAgent repositories.

3. Select the **General** tab, then ensure **Convert agents to SuperAgents (Windows only)** is selected.

4. Select **Use systems running SuperAgents as distributed repositories**, then type a folder path location for the repository. This is the location where the master repository copies updates during replication. You can use standard Windows variables, such as `<PROGRAM_FILES_DIR>`.
   All requested files from the agent system are served from this location using the agent’s built-in HTTP webserver.

5. Click Save.

6. Assign this policy to each system that you want to host a SuperAgent repository.

The next time the agent calls in to the server, the new policy is retrieved. If you do not want to wait for the next agent-server communication interval, you can send an agent wake-up call to the systems. When the distributed repository is created, the folder you specified is created on the system if it did not already exist.

In addition, the network location is added to the repository list of the SiteList.xml file. This makes the site available for updating by systems throughout your managed environment.

Replicate packages to SuperAgent repositories

Select which repository-specific packages are replicated to distributed repositories.

For option definitions, click ? in the interface.
**Repositories**

Create and configure repositories on FTP or HTTP servers and UNC shares

---

**Task**

1. **Click Menu | Software | Distributed Repositories.**
   
   A list of all distributed repositories appears.

2. **Locate and click on the desired SuperAgent repository.**
   
   The Distributed Repository Builder wizard opens.

3. **On the Package Types page, select the required package types.**

   Ensure that all packages required by any managed system using this repository are selected. Managed systems go to one repository for all packages — the task fails for systems that are expecting to find a package type that is not present. This feature ensures packages that are used only by a few systems are not replicated throughout your entire environment.

4. **Click Save.**

**Delete SuperAgent distributed repositories**

Remove SuperAgent distributed repositories from the host system and the repository list (SiteList.xml). New configurations take effect during the next agent-server communication.

**Task**

For option definitions, click ? in the interface.

1. **From the ePolicy Orchestrator console, click Menu | Policy | Policy Catalog, then click the name of the SuperAgent policy you want to modify.**

2. **On the General tab, deselect Use systems running SuperAgents as distributed repositories, then click Save.**

   To delete a limited number of your existing SuperAgent distributed repositories, duplicate the McAfee Agent policy assigned to these systems and deselect Use systems running SuperAgents as distributed repositories before saving it. Assign this new policy as-needed.

The SuperAgent repository is deleted and removed from the repository list. However, the agent still functions as a SuperAgent as long as you leave the Convert agents to SuperAgents option selected. Agents that have not received a new site list after the policy change continue to update from the SuperAgent that was removed.

---

**Create and configure repositories on FTP or HTTP servers and UNC shares**

You can host distributed repositories on existing FTP, HTTP servers or UNC shares. Although a dedicated server is not required, the system should be robust enough to handle the load when your managed systems connect for updates.
Repositories
Create and configure repositories on FTP or HTTP servers and UNC shares

Tasks

- **Create a folder location on page 76**
  Create the folder that hosts repository contents on the distributed repository system. Different processes are used for UNC share repositories and FTP or HTTP repositories.

- **Add the distributed repository to ePolicy Orchestrator on page 76**
  Add an entry to the repository list and specify the folder the new distributed repository uses.

- **Avoid replication of selected packages on page 78**
  If distributed repositories are set up to replicate only selected packages, your newly checked-in package is replicated by default. Depending on your requirements for testing and validating, you might want to avoid replicating some packages to your distributed repositories.

- **Disable replication of selected packages on page 78**

- **Enable folder sharing for UNC and HTTP repositories on page 79**
  On an HTTP or UNC distributed repository, you must enable the folder for sharing across the network, so that your ePolicy Orchestrator server can copy files to the repository.

- **Edit distributed repositories on page 79**
  Edit a distributed repository configuration, authentication, and package selection options as needed.

- **Delete distributed repositories on page 79**
  Delete HTTP, FTP, or UNC distributed repositories. Doing so also deletes the contents of the distributed repositories.

Create a folder location
Create the folder that hosts repository contents on the distributed repository system. Different processes are used for UNC share repositories and FTP or HTTP repositories.

- For UNC share repositories, create the folder on the system and enable sharing.

- For FTP or HTTP repositories, use your existing FTP or HTTP server software, such as Microsoft Internet Information Services (IIS), to create a new folder and site location. See your web server documentation for details.

Add the distributed repository to ePolicy Orchestrator
Add an entry to the repository list and specify the folder the new distributed repository uses.

Do not configure distributed repositories to reference the same directory as your master repository. Doing so causes the files on the master repository to become locked by users of the distributed repository, which can cause pulls and package check-ins to fail and leave the master repository in an unusable state.

Task
For option definitions, click ? in the interface.

1. Click **Menu | Software | Distributed Repositories**, then click **Actions | New Repository**. The Distributed Repository Builder wizard opens.

2. On the Description page, type a unique name and select **HTTP**, **UNC**, or **FTP**, then click **Next**. The name of the repository does not need to be the name of the system hosting the repository.

3. On the Server page, configure one of the following server types.
HTTP server type
- From the URL drop-down list, select DNS Name, IPv4, or IPv6 as the type of server address, then enter the address.

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>Specifies the DNS name of the server.</td>
</tr>
<tr>
<td>IPv4</td>
<td>Specifies the IPv4 address of the server.</td>
</tr>
<tr>
<td>IPv6</td>
<td>Specifies the IPv6 address of the server.</td>
</tr>
</tbody>
</table>

- Enter the port number of the server: HTTP default is 80.
- Specify the Replication UNC path for your HTTP folder.

UNC server type
- Enter the network directory path where the repository resides. Use this format: \\<COMPUTER>\<FOLDER>.

FTP server type
- From the URL drop-down list, select DNS Name, IPv4, or IPv6 as the type of server address, then enter the address.

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>Specifies the DNS name of the server.</td>
</tr>
<tr>
<td>IPv4</td>
<td>Specifies the IPv4 address of the server.</td>
</tr>
<tr>
<td>IPv6</td>
<td>Specifies the IPv6 address of the server.</td>
</tr>
</tbody>
</table>

- Enter the port number of the server: FTP default is 21

4 Click Next.

5 On the Credentials page:
   a Enter Download credentials. Use credentials with read-only permissions to the HTTP server, FTP server, or UNC share that hosts the repository.

      HTTP or FTP server type:
      - Select Anonymous to use an unknown user account.
      - Select FTP or HTTP authentication (if the server requires authentication), then enter the user account information.

      UNC server type:
      - Select Use credentials of logged-on account to use the credentials of the currently logged-on user.
      - Select Enter the download credentials, then enter domain and user account information.

   b Click Test Credentials. After a few seconds, a confirmation message appears, stating that the site is accessible to systems using the authentication information. If credentials are incorrect, check the following:
      - User name and password
      - URL or path on the previous panel of the wizard
      - HTTP, FTP, or UNC site on the system

6 Enter Replication credentials.
The server uses these credentials when it replicates DAT files, engine files, or other product updates from the master repository to the distributed repository. These credentials must have both read and write permissions for the distributed repository:

- For **FTP**, enter the user account information.
- For **HTTP** or **UNC**, enter domain and user account information.
- Click **Test Credentials**. After a few seconds, a confirmation message appears that the site is accessible to systems using the authentication information. If credentials are incorrect, check the following:
  - User name and password
  - URL or path on the previous panel of the wizard
  - HTTP, FTP, or UNC site on the system

7 Click **Next**. The Package Types page appears.

8 Select whether to replicate all packages or selected packages to this distributed repository, then click **Next**.
   - If you choose the **Selected packages** option, manually select the **Signatures and engines** and **Products, patches, service packs, etc.** you want to replicate.
   - Optionally select to **Replicate legacy DATs**.

   Ensure all packages required by managed systems using this repository are not deselected. Managed systems go to one repository for all packages — if a needed package type is not present in the repository, the task fails. This feature ensures packages that only a few systems use are not replicated throughout your entire environment.

9 Review the Summary page, then click **Save** to add the repository. The ePolicy Orchestrator software adds the new distributed repository to its database.

**Avoid replication of selected packages**

If distributed repositories are set up to replicate only selected packages, your newly checked-in package is replicated by default. Depending on your requirements for testing and validating, you might want to avoid replicating some packages to your distributed repositories.

Use this task to avoid replicating a newly checked-in package.

**Task**

For option definitions, click ? in the interface.

1 Click **Menu | Software | Distributed Repositories**, then click the wanted repository. The **Distributed Repository Builder** wizard opens.

2 On the **Package Types** page, deselect the package that you want to avoid being replicated.

3 Click **Save**.

**Disable replication of selected packages**

If distributed repositories are set up to replicate only selected packages, your newly checked-in package is replicated by default. To disable the impending replication of a package, disable the replication task before checking in the package.

Use this task to disable replication before checking in the new package.
Task
For option definitions, click ? in the interface.

1. Click Menu | Automation | Server Tasks, then select Edit next to the desired replication server task. The Server Task Builder wizard opens.

2. On the Description page, select the Schedule status as Disabled, then click Save.

Enable folder sharing for UNC and HTTP repositories
On an HTTP or UNC distributed repository, you must enable the folder for sharing across the network, so that your ePolicy Orchestrator server can copy files to the repository. This is for replication purposes only. Managed systems configured to use the distributed repository use the appropriate protocol (HTTP, FTP, or Windows file sharing) and do not require folder sharing.

Task
1. On the managed system, locate the folder you created using Windows Explorer.
2. Right-click the folder, then select Sharing.
3. On the Sharing tab, select Share this folder.
4. Configure share permissions as needed.
   - Systems updating from the repository require only read access, but administrator accounts, including the account used by the ePolicy Orchestrator server service, require write access. See your Microsoft Windows documentation to configure appropriate security settings for shared folders.
5. Click OK.

Edit distributed repositories
Edit a distributed repository configuration, authentication, and package selection options as needed.

Task
For option definitions, click ? in the interface.

1. Click Menu | Software | Distributed Repositories, then click the desired repository. The Distributed Repository Builder wizard opens, displaying the details of the distributed repository.
2. Change configuration, authentication, and package selection options as needed.
3. Click Save.

Delete distributed repositories
Delete HTTP, FTP, or UNC distributed repositories. Doing so also deletes the contents of the distributed repositories.
Task
For option definitions, click ? in the interface.
1 Click Menu | Software | Distributed Repositories, then click Delete next to the desired repository.
2 On the Delete Repository dialog box, click OK.

Deleting the repository does not delete the packages on the system hosting the repository.

Deleted repositories are removed from the repository list.

Use local distributed repositories that are not managed
Copy contents from the master repository into an unmanaged distributed repository.
Once an unmanaged repository is created, you must manually configure managed systems to go to the unmanaged repository for files.
For option definitions, click ? in the interface.

Task
1 Copy all files and subdirectories in the master repository folder from the server.
   By default, this is in the following location on your server: C:\Program Files\McAfee\ePO\4.6.0\DB\Software
2 Paste the copied files and subfolders in your repository folder on the distributed repository system.
3 Configure an agent policy for managed systems to use the new unmanaged distributed repository:
   a Click Menu | Policy | Policy Catalog, then select the Product as McAfee Agent and Category as Repository.
   b Click on an existing agent policy or create a new agent policy.

   Policy inheritance cannot be broken at the level of option tabs that constitute a policy. Therefore, when you apply this policy to systems, ensure that only the desired systems receive and inherit the policy to use the unmanaged distributed repository.
   c On the Repositories tab, click Add.
      The Add Repository window appears.
   d Type a name in the Repository Name text field.
      The name does not have to be the name of the system hosting the repository.
   e Under Retrieve Files From, select the type of repository.
   f Under Configuration, type the location of the repository using appropriate syntax for the repository type.
   g Type a port number or keep the default port.
   h Configure authentication credentials as needed.
   i Click OK to add the new distributed repository to the list.
j Select the new repository in the list.
   The type Local indicates it is not managed by the ePolicy Orchestrator software. When an
   unmanaged repository is selected in the Repository list, the Edit and Delete buttons are enabled.

k Click Save.

Any system where this policy is applied receives the new policy at the next agent-server
communication.

---

Work with the repository list files

You can export the repository list SiteList.xml and SiteMgr.xml files.

These files:
- SiteList.xml — Used by the agent and supported products.
- SiteMgr.xml — Used when reinstalling the McAfee ePO server, or for importing into other McAfee
ePO servers that use the same distributed repositories or source sites.

Tasks
- Export the repository list SiteList.xml file on page 81
  Export the repository list (SiteList.xml) file for manual delivery to systems, or for import
during the installation of supported products.
- Export the repository list for backup or use by other servers on page 82
  Use the exported SiteMgr.xml file to restore distributed repositories and source sites when
you reinstall the McAfee ePO server, or when you want to share distributed repositories or
source sites with another McAfee ePO server.
- Import distributed repositories from the repository list on page 82
  Import distributed repositories from the SiteMgr.xml file after reinstalling a server, or when
you want one server to use the same distributed repositories as another server.
- Import source sites from the SiteMgr.xml file on page 82
  After re-installing a server, and when you want two servers to use the same distributed
repositories, import source sites from a repository list file.

Export the repository list SiteList.xml file

Export the repository list (SiteList.xml) file for manual delivery to systems, or for import during the
installation of supported products.

Task
For option definitions, click ? in the interface.

1 Click Menu | Software | Master Repository, then click Actions | Export Sitelist.
   The File Download dialog box appears.

2 Click Save, browse to the location to save the SiteList.xml file, then click Save.

Once you have exported this file, you can import it during the installation of supported products. For
instructions, see the Installation Guide for that product.

You can also distribute the repository list to managed systems, then apply the repository list to the
agent.
Export the repository list for backup or use by other servers

Use the exported SiteMgr.xml file to restore distributed repositories and source sites when you reinstall the McAfee ePO server, or when you want to share distributed repositories or source sites with another McAfee ePO server.

You can export this file from either the Distributed Repositories or Source Sites pages. However, when you import this file to either page, it imports only the items from the file that are listed on that page. For example, when this file is imported to the Distributed Repositories page, only the distributed repositories in the file are imported. Therefore, if you want to import both distributed repositories and source sites, you must import the file twice, once from each page.

For option definitions, click ? in the interface.

Task
1 Click Menu | Software | Distributed Repositories (or Source Sites), then click Actions | Export Repositories (or Export Source Sites).
   The File Download dialog box appears.
2 Click Save, browse to the location to save the file, then click Save.

Import distributed repositories from the repository list

Import distributed repositories from the SiteMgr.xml file after reinstalling a server, or when you want one server to use the same distributed repositories as another server.

Task
For option definitions, click ? in the interface.
1 Click Menu | Software | Distributed Repositories, then click Actions | Import Repositories.
   The Import Repositories page appears.
2 Browse to select the exported SiteMgr.xml file, then click OK. The distributed repository is imported into the server.
3 Click OK.

The selected repositories are added to the list of repositories on this server.

Import source sites from the SiteMgr.xml file

After re-installing a server, and when you want two servers to use the same distributed repositories, import source sites from a repository list file.

Task
For option definitions, click ? in the interface.
1 Click Menu | Configuration | Server Settings, then from the Setting Categories list select Source Sites and click Edit.
   The Edit Source Sites page appears.
2 Click Import. The Import repositories page appears.
3 Browse to and select the exported SiteMgr.xml file, then click OK.
   The Import Source Sites page appears.
4 Select the desired source sites to import into this server, then click OK.
The selected source sites are added to the list of repositories on this server.
Repositories
Work with the repository list files
You can access additional servers by registering them with your McAfee ePO server. Registered servers allow you to integrate your software with other, external servers. For example, register an LDAP server to connect with your Active Directory server.

McAfee ePolicy Orchestrator can communicate with:

- Other McAfee ePO servers
- HTTP servers
- Additional, remote, database servers
- Ticketing servers
- LDAP servers

Each type of registered server supports or supplements the functionality of ePolicy Orchestrator and other McAfee and third-party extensions and products.

Contents

- Register McAfee ePO servers
- Register LDAP servers
- Register SNMP servers
- Register a database server
- Sharing objects between servers

Register McAfee ePO servers

Register additional McAfee ePO servers for use with your main McAfee ePO server to collect or aggregate data.

Task

For option definitions, click ? in the interface.

1. Select Menu | Configuration | Registered Servers and click New Server.
2. From the Server type menu on the Description page, select ePO, specify a unique name and any notes, then click Next.
3. Specify the following options to configure the server:

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication type</td>
<td>Specifies the type of authentication to use for this database, including:</td>
</tr>
<tr>
<td></td>
<td>• Windows authentication</td>
</tr>
<tr>
<td></td>
<td>• SQL authentication</td>
</tr>
<tr>
<td>Client task sharing</td>
<td>Specifies whether to enable or disable client task for this server.</td>
</tr>
<tr>
<td>Option</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Database name</td>
<td>Specifies the name for this database.</td>
</tr>
<tr>
<td>Database port</td>
<td>Specifies the port for this database.</td>
</tr>
<tr>
<td>Database server</td>
<td>Specifies the name of the database for this server. You can specify a database using DNS Name or IP address (IPv4 or IPv6).</td>
</tr>
<tr>
<td>ePO Version</td>
<td>Specifies the version of the McAfee ePO server being registered.</td>
</tr>
<tr>
<td>Password</td>
<td>Specifies the password for this server.</td>
</tr>
<tr>
<td>Policy sharing</td>
<td>Specifies whether to enable or disable policy sharing for this server.</td>
</tr>
<tr>
<td>SQL Server instance</td>
<td>Allows you to specify whether this is the default server or a specific instance, by providing the Instance name.</td>
</tr>
<tr>
<td></td>
<td>Ensure that the SQL browser service is running before connecting to a specific SQL instance using its instance name. Specify the port number if the SQL browser service is not running.</td>
</tr>
<tr>
<td></td>
<td>Select the Default SQL server instance and type the port number to connect to the SQL server instance.</td>
</tr>
<tr>
<td>SSL communication with</td>
<td>Specifies whether ePolicy Orchestrator uses SSL (Secure Socket Layer) communication with this database server including:</td>
</tr>
<tr>
<td>database server</td>
<td>• Try to use SSL</td>
</tr>
<tr>
<td></td>
<td>• Always use SSL</td>
</tr>
<tr>
<td></td>
<td>• Never use SSL</td>
</tr>
<tr>
<td>Test connection</td>
<td>Verifies the connection for the detailed server.</td>
</tr>
<tr>
<td>Transfer systems</td>
<td>Specifies whether to enable or disable the ability to transfer systems for this server. When enabled, select Automatic sitelist import or Manual sitelist import.</td>
</tr>
<tr>
<td></td>
<td>When choosing Manual sitelist import, it is possible to cause older versions of McAfee Agent (version 4.0 and earlier) to be unable to contact their Agent Handler. This may happen when</td>
</tr>
<tr>
<td></td>
<td>• Transferring systems from this McAfee ePO server to the registered McAfee ePO server</td>
</tr>
<tr>
<td></td>
<td>• and an Agent Handler name appears alpha-numerically earlier than the McAfee ePO server name in the supplied sitelist</td>
</tr>
<tr>
<td></td>
<td>• and the older Agents use that Agent Handler</td>
</tr>
<tr>
<td>Use NTLMv2</td>
<td>Optionally choose to use NT LAN Manager authentication protocol. Select this option when the server you are registering employs this protocol.</td>
</tr>
<tr>
<td>User name</td>
<td>Specifies the user name for this server.</td>
</tr>
</tbody>
</table>

4 Click Save.

**Register LDAP servers**

You must have a registered LDAP (Lightweight Directory Access Protocol) server to use Policy Assignment Rules, to enable dynamically assigned permission sets, and to enable Active Directory User Login.
Task
For option definitions, click ? in the interface.

1. Select Menu | Configuration | Registered Servers, then click New Server.

2. From the Server type menu on the Description page, select LDAP Server, specify a unique name and any details, then click Next.

3. Choose whether you are registering an OpenLDAP or Active Directory server in the LDAP server type list.

   The rest of these instructions will assume an Active Directory server is being configured. OpenLDAP-specific information is included where required.

4. Choose if you are specifying a Domain name or a specific server name in the Server name section.

   Use DNS-style domain names (e.g. internaldomain.com) and fully-qualified domain names or IP addresses for servers. (e.g. server1.internaldomain.com or 192.168.75.101)

   Using domain names gives fail-over support, and allows you to choose only servers from a specific site if desired.

   OpenLDAP servers can only use server names. They cannot be specified by domain.

5. Choose if you want to Use Global Catalog.

   This is deselected by default. Selecting it can provide significant performance benefits. It should only be selected if the registered domain is the parent of only local domains. If non-local domains are included, chasing referrals could cause significant non-local network traffic, possibly severely impacting performance.

   Use Global Catalog is not available for OpenLDAP servers.

6. If you have chosen to not use the Global Catalog, choose whether to Chase referrals or not.

   Chasing referrals can cause performance problems if it leads to non-local network traffic, whether or not a Global Catalog is used.

7. Choose whether to Use SSL when communicating with this server or not.

8. If you are configuring an OpenLDAP server, enter the Port.

9. Enter a Username and Password as indicated.

   These credentials should be for an admin account on the server. Use domain\username format on Active Directory servers and cn=User,dc=realmd,dc=com format on OpenLDAP servers.

10. Either enter a Site name for the server, or select it by clicking Browse and navigating to it.

11. Click Test Connection to verify communication with the server as specified. Alter information as necessary.

12. Click Save to register the server.

Register SNMP servers
To receive an SNMP trap, you must add the SNMP server’s information, so that ePolicy Orchestrator knows where to send the trap.

For option definitions click ? in the interface.
**Task**

1. Click **Menu | Configuration | Registered Servers**, then click **New Server**.

2. From the Server type menu on the Description page, select **SNMP Server**, provide the name and any additional information about the server, then click **Next**.

3. From the URL drop-down list, select one of these types of server address, then enter the address:

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>Specifies the DNS name of the registered server.</td>
</tr>
<tr>
<td>IPv4</td>
<td>Specifies the IPv4 address of the registered server.</td>
</tr>
<tr>
<td>IPv6</td>
<td>Specifies the DNS name of the registered server which has an IPv6 address.</td>
</tr>
</tbody>
</table>

4. Select the SNMP version that your server uses:
   - If you select **SNMPv1** or **SNMPv2c** as the SNMP server version, type the community string of the server under **Security**.
   - If you select **SNMPv3**, provide the **SNMPv3 Security** details.

5. Click **Send Test Trap** to test your configuration.

6. Click **Save**.

The added SNMP server appears on the Registered Server page.

---

### Register a database server

Before you can retrieve data from a database server, you must register it with ePolicy Orchestrator.

**Task**

For option definitions, click ? in the interface.

1. Open the Registered Servers page: select **Menu | Configuration | Registered Servers**, then click **New Server**.

2. Select **Database server** in the **Server type** drop-down list, enter a server name and an optional description, then click **Next**.

3. Choose a **Database type** from the drop-down list of registered types. Indicate if you want this database type to be as the default.
   - If there is already a default database assigned for this database type, it is indicated in the **Current Default database for database type** row.

4. Indicate the **Database Vendor**. Currently only Microsoft SQL Server and MySQL are supported.

5. Enter the connection specifics and login credentials for the database server.

6. To verify that all connection information and login credentials are entered correctly, click **Test Connection**.
   - A status message indicates success or failure.

7. Click **Save**.
Sharing objects between servers

Frequently, the easiest and fastest way to replicate behavior from one ePolicy Orchestrator server to another is to export the item describing the behavior and import it onto the other server.

Export objects from ePolicy Orchestrator

Frequently, the easiest and fastest way to replicate behavior from one ePolicy Orchestrator server to another is to export the item describing the behavior and import it onto the other server. Items exported from ePolicy Orchestrator are stored in XML files that describe the exported items in detail. Objects exported from an McAfee ePO server are displayed in your browser as XML. Your browser settings determine now the XML is displayed and saved.

Exported file contents

An exported file usually contains an outer containing element named `<list>` in the event multiple items are being exported. If only a single object is exported, this outer containing element may be named after the object. (e.g. `<query>`). Any more detailed contents are variable depending on the exported item type.

Exportable items

The following items can be exported. Installed extensions may add items to this list. Please check the extension's documentation for details.

- Dashboards
- Permission Sets
- Queries
- Reports
- Server Tasks
- Users
- Automatic Responses

The following items can have a table of their current contents exported.

- Audit Log
- Issues

Import items into ePolicy Orchestrator

Items exported from a ePolicy Orchestrator server can be imported into another server. ePolicy Orchestrator exports items into XML. These XML files contain exact descriptions of the exported items.

Importing items

When importing items into ePolicy Orchestrator, certain rules are followed:

- All items except users are imported with private visibility by default. You may apply other permissions either during or after import.
- If an item already exists with the same name, "(imported)" or "(copy)" is appended to the imported item's name.
- Imported items requiring an extension or product that does not exist on the new server will be marked invalid.

ePolicy Orchestrator will only import XML files exported by ePolicy Orchestrator.
Specific details on how to import different kinds of items can be found in the documentation for the individual items.

**Export and import functionality between McAfee ePO servers and versions**

When moving data from one ePolicy Orchestrator server to another there are some data objects that can be easily exported and imported and some that have limitations.

The export and import limitations depend on the ePolicy Orchestrator software version and if the data is imported back to the same McAfee ePO server, or to a different server. These tables list the data export and import functionality and limitation.

**Table 7-2  Export comparison between McAfee ePO 4.5, 4.6, and 5.0 servers**

<table>
<thead>
<tr>
<th>Data object</th>
<th>Available to export from McAfee ePO...</th>
<th>...version 4.5</th>
<th>...version 4.6</th>
<th>...version 5.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Handler Assignments</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent Handler Settings</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>This does not include Agent Handler Assignments.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automatic Responses</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Client Task Assignments</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Client Task Objects</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Contacts</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Dashboards</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Detected Systems Exceptions</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>This does not include Detected Systems Exceptions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distributed Repositories</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Log Information</td>
<td>No (except for rollup)</td>
<td>No (except for rollup)</td>
<td>No (except for rollup)</td>
<td></td>
</tr>
<tr>
<td>Permission Sets</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Personal Settings</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Policy Assignment Rules</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Policy Assignments</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Policy Objects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Queries</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Registered Executables</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Registered Servers</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Reports</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Security Keys</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Table 7-2  Export comparison between McAfee ePO 4.5, 4.6, and 5.0 servers *(continued)*

<table>
<thead>
<tr>
<th>Data object</th>
<th>Available to export from McAfee ePO...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...version 4.5</td>
</tr>
<tr>
<td>Server Settings</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td><em>(This does not include Security Keys and Source Sites.)</em></td>
</tr>
<tr>
<td>Server Tasks</td>
<td>No</td>
</tr>
<tr>
<td>Source Sites</td>
<td>Yes</td>
</tr>
<tr>
<td>System Tree</td>
<td>Yes</td>
</tr>
<tr>
<td>Tag Catalog</td>
<td>Yes</td>
</tr>
<tr>
<td>Tree Active Directory Sync</td>
<td>No</td>
</tr>
<tr>
<td>Tree Sorting</td>
<td>No</td>
</tr>
<tr>
<td>User Configured Options</td>
<td>No</td>
</tr>
<tr>
<td>Users</td>
<td>No</td>
</tr>
</tbody>
</table>

Table 7-3  Export functionality from McAfee ePO 4.5 to different 5.0 server

<table>
<thead>
<tr>
<th>Data object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 4.5 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Agent Handler Assignments</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Agent Handler Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Automatic Responses</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Client Task Assignments</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Client Task Objects</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Contacts</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Dashboards</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Detected Systems Exceptions</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Detected Systems Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Distributed Repositories</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td>Log Information</td>
<td>No (except for rollup)</td>
<td>No (except for rollup)</td>
</tr>
<tr>
<td>Data object</td>
<td>Can be exported...</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>from McAfee ePO 4.5 server</td>
<td>to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Permission Sets</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Personal Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Policy Assignment Rules</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unique IDs contained in the export information and import are rejected.</td>
</tr>
<tr>
<td>Policy Assignments</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Policy Objects</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The McAfee Agent Repository policy might not contain the same settings for McAfee ePO servers and Agent Handlers as the old servers, Agent Handlers might not be present, and the policy might fail.</td>
</tr>
<tr>
<td>Queries</td>
<td>Yes (but with limitations)</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Queries containing server-specific data are incorrect after import (for example, Tags, Group, or Policy).</td>
</tr>
<tr>
<td>Registered Executables</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Registered Servers</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Reports</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Security Keys</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Server Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This does not include Security Keys and Source Sites.</td>
</tr>
<tr>
<td>Server Tasks</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Source Sites</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>System Tree</td>
<td>Yes (but with limitations)</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The exported file needs 'My Organization' removed from each line before importing.</td>
</tr>
<tr>
<td>Tag Catalog</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Server-specific data in specific tags causes those tags to be unavailable after importing.</td>
</tr>
<tr>
<td>Tree Active Directory Sync</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Tree Sorting</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>User Configured Options</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Users</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Data object</td>
<td>Can be exported...</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>...from McAfee ePO 4.6 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Agent Handler Assignments</td>
<td>ID use causes tree-based assignment location loss. Selected Agent Handler information is lost.</td>
<td></td>
</tr>
<tr>
<td>Agent Handler Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>This does not include Agent Handler Assignments.</td>
<td></td>
</tr>
<tr>
<td>Automatic Responses</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>The import is rejected.</td>
<td></td>
</tr>
<tr>
<td>Client Task Assignments</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Client Task Objects</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Contacts</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Dashboards</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Detected Systems Exceptions</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>This does not include Detected Systems Exceptions.</td>
<td></td>
</tr>
<tr>
<td>Detected Systems Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Distributed Repositories</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td>Unless the repositories contain the same content, the exclusion list might cause unexpected package selections.</td>
<td></td>
</tr>
<tr>
<td>Log Information</td>
<td>No (except for rollup)</td>
<td>No (except for rollup)</td>
</tr>
<tr>
<td>Permission Sets</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Personal Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Policy Assignment Rules</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Unique IDs contained in the export information and import are rejected.</td>
<td></td>
</tr>
<tr>
<td>Policy Assignments</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Policy Objects</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>The McAfee Agent Repository policy might not contain the same settings for McAfee ePO servers and Agent Handlers as the old servers, Agent Handlers might not be present, and the policy might fail.</td>
<td></td>
</tr>
<tr>
<td>Queries</td>
<td>Yes (but with limitations)</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Queries containing server-specific data are incorrect after import (for example, Tags, Group, or Policy).</td>
<td></td>
</tr>
</tbody>
</table>
### Table 7-4 Export functionality from McAfee ePO 4.6 to different 5.0 server (continued)

<table>
<thead>
<tr>
<th>Data object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 4.6 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Registered Executables</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Registered Servers</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Reports</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Security Keys</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Server Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- This does not include Security Keys and Source Sites.

<table>
<thead>
<tr>
<th>Object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 5.0 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Server Tasks</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Source Sites</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>System Tree</td>
<td>Yes (but with limitations)</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td>Tag Catalog</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Tree Active Directory Sync</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Tree Sorting</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>User Configured Options</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Users</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

The exported file needs 'My Organization' removed from each line before importing.

- Server: specific data in tags causes those Tags to be unavailable after importing.

### Table 7-5 Export functionality from McAfee ePO 5.0 versus import functionality to different 5.0 server

<table>
<thead>
<tr>
<th>Object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 5.0 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Agent Handler Assignments</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Agent Handler Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- This does not include Agent Handler Assignments.

- ID use causes tree-based assignment location loss. Selected Agent Handler information is lost.

<table>
<thead>
<tr>
<th>Object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 5.0 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Automatic Responses</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

- ID use for applicable System Tree nodes causes an incorrect filter configuration or an error.
### Table 7-5 Export functionality from McAfee ePO 5.0 versus import functionality to different 5.0 server (continued)

<table>
<thead>
<tr>
<th>Object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...from McAfee ePO 5.0 server</td>
<td>...to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Client Task Assignments</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Broken inheritance tasks are lost and duplicate task assignments are created if tasks are imported before or after breaking inheritance.</td>
</tr>
<tr>
<td>Client Task Objects</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Master repository content must match (even versions) with the original server or selections are blank or not present.</td>
</tr>
<tr>
<td>Contacts</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Queries containing server-specific data are incorrect after import (for example Tags, Group, or Policy).</td>
</tr>
<tr>
<td>Dashboards</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Queries containing server-specific data are incorrect after import (for example Tags, Group, or Policy).</td>
</tr>
<tr>
<td>Detected Systems Exceptions</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Exception categories are not exported.</td>
</tr>
<tr>
<td>Detected Systems Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This does not include Detected Systems Exceptions.</td>
</tr>
<tr>
<td>Distributed Repositories</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The package exclusion list is lost after import.</td>
</tr>
<tr>
<td>Log Information</td>
<td>No (except for rollup)</td>
<td>No (except for rollup)</td>
</tr>
<tr>
<td>Permission Sets</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Permission sets must have the same System Tree structure and repository content.</td>
</tr>
<tr>
<td>Personal Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Policy Assignment Rules</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IDs cause servers to use incorrect tags and registered servers.</td>
</tr>
<tr>
<td>Policy Assignments</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Multiple assignments of multi-slot policies at one node are not imported correctly.</td>
</tr>
<tr>
<td>Policy Objects</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The McAfee Agent Repository policy might not contain the same settings for McAfee ePO servers and Agent Handlers as the old servers, Agent Handlers might not be present, and the policy might fail.</td>
</tr>
<tr>
<td>Queries</td>
<td>Yes (but with limitations)</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Queries containing server-specific data are incorrect after import. (for example Tags, Group, or Policy).</td>
</tr>
</tbody>
</table>
### Table 7-5 Export functionality from McAfee ePO 5.0 versus import functionality to different 5.0 server (continued)

<table>
<thead>
<tr>
<th>Object</th>
<th>Can be exported...</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>…from McAfee ePO 5.0 server</td>
<td>…to different McAfee ePO 5.0 server</td>
</tr>
<tr>
<td>Registered Executables</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Registered Servers</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Reports</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Queries containing server-specific data are incorrect after import (for example Tags, Group, or Policy).</td>
<td></td>
</tr>
<tr>
<td>Security Keys</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Server Settings</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>This does not include Security Keys and Source Sites.</td>
<td></td>
</tr>
<tr>
<td>Server Tasks</td>
<td>Yes</td>
<td>Yes (but with limitations)</td>
</tr>
<tr>
<td>Source Sites</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>System Tree</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Tag Catalog</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Server-specific data in tags causes the tags to be unavailable after import</td>
<td></td>
</tr>
<tr>
<td>Tree Active Directory Sync</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Tree Sorting</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>User Configured Options</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Users</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Table 7-6 McAfee ePO 5.0 Server Task export and import functionality

<table>
<thead>
<tr>
<th>Server task object</th>
<th>Exportable to different server</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks that include queries</td>
<td>Yes (but with limitations)</td>
<td>Duplicate tasks are created for multi-used queries between tasks if they are imported at different times.</td>
</tr>
<tr>
<td>Tasks that include file paths</td>
<td>Yes (but with limitations)</td>
<td>File paths must match on servers or files might not be written (for example Files written to the D drive by exporting the server fail if the imported server does not have a D drive).</td>
</tr>
<tr>
<td>System Search</td>
<td>No</td>
<td>IDs used for groups and tags lead to a mismatch.</td>
</tr>
<tr>
<td>Run Tag Criteria</td>
<td>No</td>
<td>IDs used for tags lead to a mismatch.</td>
</tr>
<tr>
<td>Run Report</td>
<td>No</td>
<td>IDs used for queries might lead to a mismatch; queries can contain server-specific info.</td>
</tr>
<tr>
<td>Run Query - Update Agents</td>
<td>Yes (but with limitations)</td>
<td>The queries must have the same content or the task loses settings.</td>
</tr>
</tbody>
</table>
### Table 7-6 McAfee ePO 5.0 Server Task export and import functionality (continued)

<table>
<thead>
<tr>
<th>Server task object</th>
<th>Exportable to different server</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Query - Run Client Task Now</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Run Query - Move Systems</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Run Query - Exclude Tag</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Run Query - Detected System Exceptions</td>
<td>Yes (but with limitations)</td>
<td>The ID used for category selection probably causes mismatch</td>
</tr>
<tr>
<td>Run Query - Deploy McAfee Agent</td>
<td>No</td>
<td>Agent Handler- specific data might not be available to the importing server; the password is not kept in the exported file.</td>
</tr>
<tr>
<td>Run Query - Clear Tag</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Run Query - Assign Policy</td>
<td>No</td>
<td>The IDs used probably cause a mismatch and task failure, even though the policy was imported by task.</td>
</tr>
<tr>
<td>Run Query - Apply Tag</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Run Query - Add to System Tree</td>
<td>No</td>
<td>The IDs used probably cause a mismatch.</td>
</tr>
<tr>
<td>Rollup</td>
<td>No</td>
<td>If the registered servers are selective, IDs are used and can be mismatched; filtering properties may be server-specific (Applied Policies).</td>
</tr>
<tr>
<td>Repository Replication</td>
<td>Yes (but with limitations)</td>
<td>The repositories must have the same content or the task loses settings.</td>
</tr>
<tr>
<td>Repository Pull</td>
<td>No</td>
<td>The ID used for the source site might cause an issue. The repositories must have the same content or the task loses settings.</td>
</tr>
<tr>
<td>Purge X</td>
<td>Yes (but with limitations)</td>
<td>If using a query to purge, the ID used for the query probably causes a mismatch between servers.</td>
</tr>
<tr>
<td>Export Queries</td>
<td>No</td>
<td>Queries can contain server-specific data which make the queries incorrect after import.</td>
</tr>
<tr>
<td>Change Branch for Package</td>
<td>Yes (but with limitations)</td>
<td>The packages must have the same content or the task loses settings.</td>
</tr>
<tr>
<td>Active Directory Sync</td>
<td>No</td>
<td>The ID used for location, even if the tree structure is imported, probably causes a mismatch.</td>
</tr>
</tbody>
</table>

### Export objects and data from your ePolicy Orchestrator server

Exported objects and data can be used for backing up important data, and to restore or configure the ePolicy Orchestrator servers in your environment.

Most objects and data used in your server can be exported or downloaded for viewing, transforming, or importing into another server or applications. The following table lists the various items you can act on. To view data, export the tables as HTML or PDF files. To use the data in other applications, export the tables or to CSV or XML files.
Task

1. From the page displaying the objects or data, click Actions and select an option. For example, when exporting a table, select Export Table, then click Next.

2. When exporting content that can be downloaded in multiple formats, such as Query data, an Export page with configuration options appears. Specify your preferences, then click Export.

3. When exporting objects or definitions, such as client task objects or definitions, one of the following occurs:
   - A browser window opens where you can choose Open or Save.
   - An Export page containing a link to the file opens. Left-click the link to view the file in your browser, or right-click the link to save the file.
Agent Handlers

Agent Handlers route communication between agents and your McAfee ePO server. Each McAfee ePO server contains a master Agent Handler. Additional Agent Handlers can be installed on systems throughout your network.

Setting up more Agent Handlers provides the following benefits.

- Helps manage an increased number of products and systems managed by a single, logical ePolicy Orchestrator server in situations where the CPU on the database server is not overloaded.
- Provides fault tolerant and load-balanced communication with many agents, including geographically distributed agents.

Contents

- How Agent Handlers work
- Handler groups and priority
- Manage Agent Handlers

How Agent Handlers work

Agent Handlers distribute network traffic generated by agent-to-server communication by directing managed systems or groups of systems to report to a specific Agent Handler. Once assigned, a managed system communicates with the assigned Agent Handler instead of with the main McAfee ePO server.

The handler provides updated sitelists, policies, and policy assignment rules, just as the McAfee ePO server does. The handler also caches the contents of the master repository, so that agents can pull product update packages, DATs, and other necessary information.

When an agent checks in with its handler, if the handler does not have the updates needed, the handler retrieves them from the assigned repository and caches them, while passing the update through to the agent.

The Systems per Agent Handler chart displays all the Agent Handlers installed and the number of agents managed by each Agent Handler.

When an Agent Handler is uninstalled it is not displayed in this chart. If an Agent Handler assignment rule exclusively assigns agents to an Agent Handler and if the particular Agent Handler is uninstalled, then it is displayed in the chart as Uninstalled Agent Handler along with the number of agents still trying to contact this.

If the Agent Handlers are not installed correctly, then the Uninstalled Agent Handler message is displayed which indicates that the handler cannot communicate with few agents. Click the list to view the agents which cannot communicate with the handler.
Multiple Agent Handlers

You can have more than one Agent Handler in your network. You might have a large number of managed systems spread across multiple geographic areas or political boundaries. Whatever the case, you can add an organization to your managed systems by assigning distinct groups to different handlers.

Handler groups and priority

When using multiple Agent Handlers in your network, group and prioritize them to help ensure network connectivity.

Handler groups

With multiple Agent Handlers in your network, you can create handler groups. You can also apply priority to handlers in a group. Handler priority tells the agents which handler to communicate with first. If the handler with the highest priority is unavailable, the agent falls back to the next handler in the list. This priority information is contained in the repository list (sitelist.xml file) in each agent. When you change handler assignments, this file is updated as part of the agent-server communication process. Once the assignments are received, the agent waits until the next regularly scheduled communication to implement them. You can perform an immediate agent wake-up call to update the agent immediately.

Grouping handlers and assigning priority is customizable, so you can meet the needs of your specific environment. Two common scenarios for grouping handlers are:

- **Using multiple handlers for load balancing**
  
  You might have a large number of managed systems in your network, for which you want to distribute the workload of agent-server communications and policy enforcement. You can configure the handler list so that agents randomly pick the handler to communicate with.

- **Setting up a fallback plan to ensure agent-server communication**
  
  You might have systems distributed over a wide geographic area. By assigning a priority to each handler dispersed throughout this area, you can specify which handler the agents communicate with, and in what order. This can help ensure that managed systems on your network stay up-to-date by creating a fallback agent communication, much the same as fallback repositories ensure that new updates are available to your agents. If the handler with the highest priority is unavailable, the agent will fall back to the handler with the next highest priority.

In addition to assigning handler priority within a group of handlers, you can also set handler assignment priority across several groups of handlers. This adds an additional layer of redundancy to your environment to further ensure that your agents can always receive the information they need.

Sitelist files

The agent uses the sitelist.xml and sitelist.info files to decide which handler to communicate with. Each time handler assignments and priorities are updated, these files are updated on the managed system. Once these files are updated, the agent implements the new assignment or priority on the next scheduled agent-server communication.

Manage Agent Handlers

Set up Agent Handlers in your network and assign McAfee Agents to them.
Tasks

- **Assign McAfee Agents to Agent Handlers on page 101**
  Assign agents to specific handlers. You can assign systems individually, by group, and by subnet.

- **Manage Agent Handler assignments on page 101**
  Complete common management tasks for Agent Handler assignments.

- **Create Agent Handler groups on page 102**
  Handler groups make it easier to manage multiple handlers throughout your network, and can play a role in your fallback strategy.

- **Manage Agent Handler groups on page 102**
  Complete common management tasks for Agent Handler groups.

- **Move agents between handlers on page 103**
  Assign agents to specific handlers. You can assign systems using Agent Handler assignment rules, Agent Handler assignment priority, or individually using the System Tree.

Assign McAfee Agents to Agent Handlers

Assign agents to specific handlers. You can assign systems individually, by group, and by subnet. Handler assignments can specify an individual handler or a list of handlers to use. The list that you specify can be made up of individual handlers or groups of handlers.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Agent Handlers**, then click **Actions | New Assignment**.
2. Specify a unique name for this assignment.
3. Specify the agents for this assignment using one or both of the following **Agent Criteria** options:
   - Browse to a **System Tree location**.
   - Type the IP address, IP range, or subnet mask of managed systems in the **Agent Subnet** field.
4. Specify **Handler Priority** by deciding whether to:
   - **Use all Agent Handlers** — Agents randomly select which handler to communicate with.
   - **Use custom handler list** — When using a custom handler list, select the handler or handler group from the drop-down menu.

Manage Agent Handler assignments

Complete common management tasks for Agent Handler assignments.

To perform these actions, click **Menu | Configuration | Agent Handlers**, then in Handler Assignment Rules, click **Actions**.
To do this... | Do this...
--- | ---
Delete a handler assignment | Click **Delete** in the selected assignment row.
Edit a handler assignment | Click **Edit** for the selected assignment. The Agent Handler Assignment page opens, where you can specify:
- **Assignment name** — The unique name that identifies this handler assignment.
- **Agent criteria** — The systems that are included in this assignment. You can add and remove System Tree groups, or modify the list of systems in the text box.
- **Handler priority** — Choose whether to use all Agent Handlers or a custom handler list. Agents randomly select which handler to communicate with when **Use all Agent Handlers** is selected.

Use the drag-and-drop handle to quickly change the priority of handlers in your custom handler list.

Export handler assignments | Click **Export**. The Download Agent Handler Assignments page opens, where you can view or download the AgentHandlerAssignments.xml file.
Import handler assignments | Click **Import**. The Import Agent Handler Assignments dialog box opens, where you can browse to a previously downloaded AgentHandlerAssignments.xml file.
Edit the priority of handler assignments | Click **Edit Priority**. The Agent Handler Assignment | Edit Priority page opens, where you change the priority of handler assignments using the drag-and-drop handle.
View the summary of a handler assignments details | Click > in the selected assignment row.

### Create Agent Handler groups
Handler groups make it easier to manage multiple handlers throughout your network, and can play a role in your fallback strategy.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Agent Handlers**, then in **Handler Groups**, click **New Group**.

The Add/Edit Group page appears.

2. Specify the group name and the **Included Handlers** details, including:
   - Click **Use load balancer** to use a third-party load balancer, then type the **Virtual DNS Name** and **Virtual IP address** fields (both are required).
   - Click **Use custom handler list** to specify which Agent Handlers are included in this group.

When using a custom handler list, select the handlers from the Included Handlers drop-down list. Use + and - to add and remove additional Agent Handlers to the list (an Agent Handler can be included in more than one group). Use the drag-and-drop handle to change the priority of handlers. Priority determines which handler the agents try to communicate with first.

3. Click **Save**.

### Manage Agent Handler groups
Complete common management tasks for Agent Handler groups.
To perform these actions, click **Menu | Configuration | Agent Handlers**, then click the **Handler Groups** monitor.
### To do this... | Do this...
---|---
Delete a handler group | Click **Delete** in the selected group row.
Edit a handler group | Click on the handler group. The Agent Handler Group Settings page opens, where you can specify:
  - **Virtual DNS Name** — The unique name that identifies this handler group.
  - **Virtual IP address** — The IP address associated with this group.
  - **Included handlers** — Choose whether to use a third-party load balancer or a custom handler list.

| ![Tip] Use a custom handler list to specify which handlers, and in what order, agents assigned to this group communicate with.

Enable or disable a handler group | Click **Enable** or **Disable** in the selected group row.

---

### Move agents between handlers

Assign agents to specific handlers. You can assign systems using Agent Handler assignment rules, Agent Handler assignment priority, or individually using the System Tree.

Handler assignments can specify an individual handler or a list of handlers to use. The list that you specify can be made up of individual handlers or groups of handlers.

#### Tasks

- **Group agents using Agent Handler assignments** on page 103
  
Create Agent Handler assignments to group McAfee Agents together.

- **Group agents by assignment priority** on page 104
  
Group agents together and assign them to an Agent Handler that is using assignment priority.

- **Group agents using the System Tree** on page 105
  
Group agents together and assign them to an Agent Handler using the System Tree.

#### Group agents using Agent Handler assignments

Create Agent Handler assignments to group McAfee Agents together.

Handler assignments can specify an individual handler or a list of handlers to use. The list that you specify can be made up of individual handlers or groups of handlers.

| ![Tip] When assigning agents to Agent Handlers, consider geographic proximity to reduce unnecessary network traffic.

#### Task

For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Agent Handlers**, then click the required Handler Assignment Rule.

   The Agent Handler Assignment page appears.

   | ![Tip] If the Default Assignment Rules is the only assignment in the list, you must create a new assignment.

2. Type a name for the **Assignment Name**.
You can configure Agent Criteria by System Tree locations, by agent subnet, or individually using the following:

- **System Tree Locations** — Select the group from the System Tree location.
  
  You can browse to select other groups from the Select System Tree and use + and - to add and remove System Tree groups that are displayed.

- **Agent Subnet** — In the text field, type IP addresses, IP ranges, or subnet masks in the text box.

- **Individually** — In the text field, type the IPv4/IPv6 address for a specific system.

You can configure Handler Priority to **Use all Agent Handlers** or **Use custom handler list**. Click Use custom handler list, then change the handler in one of these ways:

- Change the associated handler by adding another handler to the list and deleting the previously associated handler.

- Add additional handlers to the list and set the priority that the agent uses to communicate with the handlers.

  When using a custom handler list, use + and - to add and remove additional Agent Handlers from the list (an Agent Handler can be included in more than one group). Use the drag-and-drop handle to change the priority of handlers. Priority determines which handler the agents try to communicate with first.

Click **Save**.

### Group agents by assignment priority

Group agents together and assign them to an Agent Handler that is using assignment priority. Handler assignments can specify an individual handler or a list of handlers to use. The list that you specify can be made up of individual handlers or groups of handlers. This list defines the order in which agents attempt to communicate using a particular Agent Handler.

When assigning systems to Agent Handlers, consider geographic proximity to reduce unnecessary network traffic.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Agent Handlers**. The Agent Handler page appears.

   If the Default Assignment Rules is the only assignment in the list, you must create a new assignment.

2. Edit assignments using the steps in the task **Grouping agents by assignment rules**.

3. As needed, modify the priority or hierarchy of the assignments by clicking **Actions | Edit Priority**.

   Moving one assignment to a priority lower than another assignment creates a hierarchy where the lower assignment is actually part of the higher assignment.
4 To change the priority of an assignment, which is shown in the Priority column on the left, do one of the following:
   • Use drag-and-drop — Use the drag-and-drop handle to drag the assignment row up or down to another position in the Priority column.
   • Click Move to Top — In the Quick Actions, click Move to Top to automatically move the selected assignment to the top priority.

5 When the priorities of the assignments are configured correctly, click Save.

**Group agents using the System Tree**

Group agents together and assign them to an Agent Handler using the System Tree. Handler assignments can specify an individual handler or a list of handlers to use. The list that you specify can be made up of individual handlers or groups of handlers.

When assigning systems to Agent Handlers, consider geographic proximity to reduce unnecessary network traffic.

**Task**

For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Systems.

2 In the System Tree column, navigate to the system or group you want to move.

3 Use the drag-and-drop handle to move systems from the currently configured system group to the target system group.

4 Click OK.
Managing your network security

An essential part of protecting your organization from threats is keeping your McAfee products updated with the latest security content. Your McAfee ePO server helps you do this for all the systems in your network.

Chapter 9  The System Tree
Chapter 10  Agent-server communication
Chapter 11  Software Manager
Chapter 12  Product Deployment
Chapter 13  Policy management
Chapter 14  Client tasks
Chapter 15  Server tasks
Chapter 16  Manual package and update management
Chapter 17  Events and responses
Chapter 18  McAfee Labs Security Threats
The System Tree

The System Tree is a graphical representation of how your managed network is organized. Use ePolicy Orchestrator software to automate and customize systems organization. The organizational structure you put in place affects how security policies are inherited and enforced throughout your environment. You can organize your System Tree using any of these methods:

- Automatic synchronization with your Active Directory or NT domain server.
- Criteria-based sorting, using criteria applied to systems manually or automatically.
- Manual organization from within the console (drag-and-drop).

Contents

- The System Tree structure
- Considerations when planning your System Tree
- Active Directory and NT domain synchronization
- Criteria-based sorting
- Tags
- How a system is added to the System Tree when sorted
- Enable System Tree sorting on the server
- Create and populate System Tree groups
- Move systems within the System Tree
- Transfer systems between servers

The System Tree structure

The System Tree is a hierarchical structure that organizes the systems in your network into groups and subgroups. The default System Tree structure includes two groups:

- My Organization — The root of your System Tree.
- Lost&Found — The catch-all for any systems that have not, or could not be added to other groups in your System Tree.

The My Organization group

The My Organization group, the root of your System Tree, contains all systems added to or detected on your network (manually or automatically). Until you create your own structure, all systems are added to the Lost&Found group.

The My Organization group has these characteristics:

- It can't be deleted.
- It can't be renamed.
The Lost&Found group

The Lost&Found group is a subgroup of the My Organization group. Depending on the methods you specify creating and maintaining the System Tree, the server uses different characteristics to determine where to place systems. The Lost&Found group stores systems whose locations could not be determined.

The Lost&Found group has these characteristics:

• It can't be deleted.
• It can't be renamed.
• Its sorting criteria can't be changed from being a catch-all group (although you can provide sorting criteria for the subgroups you create within it.)
• It always appears last in the list and is not alphabetized among its peers.
• Users must be granted permissions to the Lost&Found group to see the contents of Lost&Found.
• When a system is sorted into Lost&Found, it is placed in a subgroup named for the system’s domain. If no such group exists, one is created.

If you delete systems from the System Tree, be sure you select the option to remove their agents. If the agent is not removed, deleted systems reappear in the Lost&Found group because the agent continues to communicate to the server.

System Tree groups

System Tree groups represent a collection of systems. Deciding which systems to group together depends on the unique needs of your network and business. You can group systems based on machine-type (for example, laptops, servers, or desktops), geography (for example, North America or Europe), political boundaries (for example, Finance or Development), or any other criteria that supports your needs.

Groups have these characteristics:

• They are created by administrators or users with the appropriate permissions.
• They can include both systems and other groups (subgroups).
• They are administered by an administrator or a user with appropriate permissions.

Grouping systems with similar properties or requirements into these units allows you to manage policies for systems in one place, rather than setting policies for each system individually.

As part of the planning process, consider the best way to organize systems into groups prior to building the System Tree.

Inheritance

Inheritance is an important property that simplifies policy and task administration. Because of inheritance, child groups in the System Tree hierarchy inherit policies set at their parent groups. For example:

• Policies set at the My Organization level of the System Tree are inherited by groups below it.
• Group policies are inherited by subgroups or individual systems within that group.

Inheritance is enabled by default for all groups and individual systems that you add to the System Tree. This allows you to set policies and schedule client tasks in fewer places.
To allow for customization, however, inheritance can be broken by applying a new policy at any location of the System Tree (provided a user has appropriate permissions). You can lock policy assignments to preserve inheritance.

Considerations when planning your System Tree

An efficient and well-organized System Tree can simplify maintenance. Many administrative, network, and political realities of each environment can affect how your System Tree is structured.

Plan the organization of the System Tree before you build and populate it. Especially for a large network, you want to build the System Tree only once.

Because every network is different and requires different policies — and possibly different management — McAfee recommends planning your System Tree before implementing the McAfee ePO software.

Regardless of the methods you choose to create and populate the System Tree, consider your environment while planning the System Tree.

Administrator access

When planning your System Tree organization, consider the access requirements of those users who must manage the systems.

For example, you might have decentralized network administration in your organization, where different administrators have responsibilities over different parts of the network. For security reasons, you might not have an administrator account that can access every part of your network. In this scenario, you might not be able to set policies and deploy agents using a single administrator account. Instead, you might need to organize the System Tree into groups based on these divisions and create accounts and permission sets.

Consider these questions:

- Who is responsible for managing which systems?
- Who requires access to view information about the systems?
- Who should not have access to the systems and the information about them?

These questions impact both the System Tree organization, and the permission sets you create and apply to user accounts.

Environmental borders and their impact on system organization

How you organize the systems for management depends on the borders that exist in your network. These borders influence the organization of the System Tree differently than the organization of your network topology.

We recommend evaluating these borders in your network and organization, and whether they must be considered when defining the organization of your System Tree.

Topological borders

NT domains or Active Directory containers define your network. The better organized your network environment, the easier it is to create and maintain the System Tree with the synchronization features.
**Geographic borders**

Managing security is a constant balance between protection and performance. Organize your System Tree to make the best use of limited network bandwidth. Consider how the server connects to all parts of your network, especially remote locations that use slower WAN or VPN connections, instead of faster LAN connections. You might want to configure updating and agent-server communication policies differently for remote sites to minimize network traffic over slower connections.

**Political borders**

Many large networks are divided by individuals or groups responsible for managing different portions of the network. Sometimes these borders do not coincide with topological or geographic borders. Who accesses and manages the segments of the System Tree affects how you structure it.

**Functional borders**

Some networks are divided by the roles of those using the network; for example, Sales and Engineering. Even if the network is not divided by functional borders, you might need to organize segments of the System Tree by functionality if different groups require different policies.

A business group might run specific software that requires special security policies. For example, arranging your email Exchange Servers into a group and setting specific exclusions for on-access scanning.

**Subnets and IP address ranges**

In many cases, organizational units of a network use specific subnets or IP ranges, so you can create a group for a geographic location and set IP filters for it. Also, if your network isn’t spread out geographically, you can use network location, such as IP address, as the primary grouping criterion.

If possible, consider using sorting criteria based on IP address information to automate System Tree creation and maintenance. Set IP subnet masks or IP address range criteria for applicable groups within the System Tree. These filters automatically populate locations with the appropriate systems.

**Operating systems and software**

Consider grouping systems with similar operating systems to manage operating system-specific products and policies more easily. If you have legacy systems, you can create a group for them and deploy and manage security products on these systems separately. Additionally, by giving these systems a corresponding tag, you can automatically sort them into a group.

**Tags and systems with similar characteristics**

You can use tags and tag groups to automate sorting into groups.

Tags identify systems with similar characteristics. If you can organize your groups by characteristics, you can create and assign tags based on that criteria, then use these tags as group sorting criteria to ensure systems are automatically placed within the appropriate groups.
If possible, use tag-based sorting criteria to automatically populate groups with the appropriate systems. Plus, to help sort your systems, you can create tag groups nested up to four levels deep, with up to 1,000 tag subgroups in each level. For example, if your systems are organized by geographic location, chassis type (server, workstation, or laptop), system function (web server, SQL, or application server), and user, you might have these tag groups:

<table>
<thead>
<tr>
<th>Location</th>
<th>Chassis type</th>
<th>Platform</th>
<th>Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>Desktop</td>
<td>Windows</td>
<td>General</td>
</tr>
<tr>
<td></td>
<td>Laptop</td>
<td>Macintosh</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Windows</td>
<td>Accounting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Management</td>
</tr>
<tr>
<td></td>
<td>Servers</td>
<td>Linux</td>
<td>Corporate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Windows</td>
<td>Corporate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SQL</td>
<td>Corporate</td>
</tr>
<tr>
<td>San Francisco</td>
<td>Desktop</td>
<td>Windows</td>
<td>General</td>
</tr>
<tr>
<td></td>
<td>Laptop</td>
<td>Macintosh</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Windows</td>
<td>Accounting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Management</td>
</tr>
<tr>
<td></td>
<td>Servers</td>
<td>Linux</td>
<td>Corporate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Windows</td>
<td>Corporate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SQL</td>
<td>Corporate</td>
</tr>
</tbody>
</table>

**Active Directory and NT domain synchronization**

ePolicy Orchestrator software can integrate with Active Directory and NT domains as a source for systems, and can use Active Directory as a source for the structure of the System Tree.

**Active Directory synchronization**

If your network runs Active Directory, you can use Active Directory synchronization to create, populate, and maintain parts of the System Tree.

Once defined, the System Tree is updated with any new systems (and subcontainers) in your Active Directory.

Leverage Active Directory integration to perform these system management tasks:

- Synchronize with your Active Directory structure, by importing systems, and the Active Directory subcontainers (as System Tree groups), and keeping them up-to-date with Active Directory. At each synchronization, both systems and the structure are updated in the System Tree to reflect the systems and structure of Active Directory.

- Import systems as a flat list from the Active Directory container (and its subcontainers) into the synchronized group.

- Control what to do with potential duplicate systems.

- Use the system description, which is imported from Active Directory with the systems.
Use this process to integrate the System Tree with your Active Directory systems structure:

1. Configure the synchronization settings on each group that is a mapping point in the System Tree. At the same location, configure whether to:
   - Deploy agents to discovered systems.
   - Delete systems from the System Tree when they are deleted from Active Directory.
   - Allow or disallow duplicate entries of systems that exist elsewhere in the System Tree.

2. Use the Synchronize Now action to import Active Directory systems (and possibly structure) into the System Tree according to the synchronization settings.

3. Use an NT Domain/Active Directory synchronization server task to regularly synchronize the systems (and possibly the Active Directory structure) with the System Tree according to the synchronization settings.

Types of Active Directory synchronization

There are two types of Active Directory synchronization (systems only and systems and structure). Which one you use depends on the level of integration you want with Active Directory.

With each type, you control the synchronization by selecting whether to:

- Deploy agents automatically to systems new to ePolicy Orchestrator. You may not want to set this on the initial synchronization if you are importing a large number of systems and have limited bandwidth. The agent MSI is about 6 MB in size. However, you might want to deploy agents automatically to any new systems that are discovered in Active Directory during subsequent synchronization.
- Delete systems from ePolicy Orchestrator (and remove their agents) when they are deleted from Active Directory.
- Prevent adding systems to the group if they exist elsewhere in the System Tree. This ensures that you don't have duplicate systems if you manually move or sort the system to another location.
- Exclude certain Active Directory containers from the synchronization. These containers and their systems are ignored during synchronization.

Systems and structure

When using this synchronization type, changes in the Active Directory structure are carried over into your System Tree structure at the next synchronization. When systems or containers are added, moved, or removed in Active Directory, they are added, moved, or removed in the corresponding locations of the System Tree.

When to use this synchronization type

Use this to ensure that the System Tree (or parts of it) look exactly like your Active Directory structure.

If the organization of Active Directory meets your security management needs and you want the System Tree to continue to look like the mapped Active Directory structure, use this synchronization type with subsequent synchronization.

Systems only

Use this synchronization type to import systems from an Active Directory container, including those in non-excluded subcontainers, as a flat list to a mapped System Tree group. You can then move these to appropriate locations in the System Tree by assigning sorting criteria to groups.

If you choose this synchronization type, be sure to select not to add systems again if they exist elsewhere in the System Tree. This prevents duplicate entries for systems in the System Tree.
When to use this synchronization type

Use this synchronization type when you use Active Directory as a regular source of systems for ePolicy Orchestrator, but the organizational needs for security management do not coincide with the organization of containers and systems in Active Directory.

NT domain synchronization

Use your NT domains as a source for populating your System Tree. When you synchronize a group to an NT domain, all systems from the domain are put in the group as a flat list. You can manage these systems in the single group, or you can create subgroups for more granular organizational needs. Use a method, like automatic sorting, to populate these subgroups automatically.

If you move systems to other groups or subgroups of the System Tree, be sure to select to not add the systems when they already exist elsewhere in the System Tree. This prevents duplicate entries for systems in the System Tree.

Unlike Active Directory synchronization, only the system names are synchronized with NT domain synchronization; the system description is not synchronized.

Criteria-based sorting

As in past releases of ePolicy Orchestrator, you can use IP address information to automatically sort managed systems into specific groups. You can also create sorting criteria based on tags, which are like labels assigned to systems. You can use either type of criteria or both to ensure systems are where you want them in the System Tree.

Systems only need to match one criterion of a group’s sorting criteria to be placed in the group.

After creating groups and setting your sorting criteria, perform a Test Sort action to confirm that the criteria and sorting order achieve the desired results.

Once you have added sorting criteria to your groups, you can run the Sort Now action. The action moves selected systems to the appropriate group automatically. Systems that do not match the sorting criteria of any group are moved to Lost&Found.

New systems that call in to the server for the first time are added automatically to the correct group. However, if you define sorting criteria after the initial agent-server communication, you must run the Sort Now action on those systems to move them immediately to the appropriate group, or wait until the next agent-server communication.

Sorting status of systems

On any system or collection of systems, you can enable or disable System Tree sorting. If you disable System Tree sorting on a system, it is excluded from sorting actions, except when the Test Sort action is performed. When a test sort is performed, the sorting status of the system or collection is considered and can be moved or sorted from the Test Sort page.

System Tree sorting settings on the McAfee ePO server

For sorting to take place, sorting must be enabled on the server and on the systems. By default, sorting systems once enabled. As a result, systems are sorted at the first agent-server communication (or next, if applying changes to existing systems) and are not sorted again.
Test sorting systems

Use this feature to view where systems would be placed during a sort action. The Test Sort page displays the systems and the paths to the location where they would be sorted. Although this page does not display the sorting status of systems, if you select systems on the page (even ones with sorting disabled), clicking Move Systems places those systems in the location identified.

How settings affect sorting

You can choose three server settings that determine whether and when systems are sorted. Also, you can choose whether any system can be sorted by enabling or disabling System Tree sorting on selected systems in the System Tree.

Server settings

The server has three settings:

- **Disable System Tree sorting** — If criteria-based sorting does not meet your security management needs and you want to use other System Tree features (like Active Directory synchronization) to organize your systems, select this setting to prevent other McAfee ePO users from mistakenly configuring sorting criteria on groups and moving systems to undesirable locations.

- **Sort systems on each agent-server communication** — Systems are sorted again at each agent-server communication. When you change sorting criteria on groups, systems move to the new group at their next agent-server communication.

- **Sort systems once** — Systems are sorted at the next agent-server communication and marked to never be sorted again at agent-server communication, as long as this setting is selected. You can still sort such a system, however, by selecting it and clicking Sort Now.

System settings

You can disable or enable System Tree sorting on any system. If disabled on a system, that system will not be sorted, regardless of how the sorting action is taken. However, performing the Test Sort action will sort this system. If enabled on a system, that system is sorted always for the manual Sort Now action, and can be sorted at agent-server communication, depending on the server settings for System Tree sorting.

IP address sorting criteria

In many networks, subnets and IP address information reflect organizational distinctions, such as geographical location or job function. If IP address organization coincides with your needs, consider using this information to create and maintain parts or all of your System Tree structure by setting IP address sorting criteria for such groups.

In this version of ePolicy Orchestrator, this functionality has changed, and now allows for the setting of IP sorting criteria randomly throughout the tree. You no longer need to ensure that the sorting criteria of the child group’s IP address is a subset of the parent's, as long as the parent has no assigned criteria. Once configured, you can sort systems at agent-server communication, or only when a sort action is manually initiated.

> **IP address sorting criteria should not overlap between different groups. Each IP range or subnet mask in a group’s sorting criteria should cover a unique set of IP addresses. If criteria does overlap, the group where those systems end up depends on the order of the subgroups on the System Tree | Groups Details tab. You can check for IP overlap using the Check IP Integrity action in the Group Details tab.**
Tag-based sorting criteria
In addition to using IP address information to sort systems into the appropriate group, you can define sorting criteria based on the tags assigned to systems. Tag-based criteria can be used with IP address-based criteria for sorting.

Group order and sorting
For additional flexibility with System Tree management, you can configure the order of a group’s subgroups, and the order by which they are considered for a system’s placement during sorting. When multiple subgroups have matching criteria, changing this order can change where a system ends up in the System Tree.

Additionally, if you are using catch-all groups, they must be the last subgroup in the list.

Catch-all groups
Catch-all groups are groups whose sorting criteria is set to All others on the Sorting Criteria page of the group. Only subgroups at the last position of the sort order can be catch-all groups. These groups receive all systems that were sorted into the parent group, but were not sorted into any of the catch-all’s peers.

Tags

Contents
- Create tags using the New Tag Builder
- Edit, delete, export, and move tags
- Create, delete, and modify tag subgroups
- Exclude systems from automatic tagging
- Apply tags to selected systems
- Apply criteria-based tags to all matching systems
- Apply criteria-based tags on a schedule

Create tags using the New Tag Builder
Use the New Tag Builder wizard to create tags quickly.
Tags can use criteria that is evaluated against every system:
- Automatically at agent-server communication.
- When the Run Tag Criteria action is taken.
- Manually on selected systems, regardless of criteria, with the Apply Tag action.

Tags without criteria can only be applied manually to selected systems.

Task
2. On the Description page, type a name and meaningful description, then click Next. The Criteria page appears.
3. Select and configure the desired criteria, then click Next. The Evaluation page appears.

To apply the tag automatically, you must configure criteria for the tag.
4 Select whether systems are evaluated against the tag's criteria only when the Run Tag Criteria action is taken, or also at each agent-server communication, then click Next. The Preview page appears.

These options are unavailable if criteria was not configured. When systems are evaluated against a tag's criteria, the tag is applied to systems that match the criteria and have not been excluded from the tag.

5 Verify the information on this page, then click Save.

If the tag has criteria, this page displays the number of systems that will receive this tag when evaluated against its criteria.

The tag is added under the selected tag group in the Tag Tree on the Tag Catalog page.

**Edit, delete, export, and move tags**

Once tags are created using the New Tag Builder you can edit, delete, and move the tag, or tags, between tag groups using the Tags list Actions.

Use these steps to edit, delete, export, or move a tag, or multiple tags.

**Task**

1 Click Menu | Systems | Tag Catalog.

2 From the Tags list, select a tag, or multiple tags, click Actions and one of these actions from the list.

<table>
<thead>
<tr>
<th><strong>Action</strong></th>
<th><strong>Steps</strong></th>
</tr>
</thead>
</table>
| **Edit**   | From the Edit Tag Builder:  
|            | 1 On the Description page, type a name and meaningful description, then click Next. The Criteria page appears.  
|            | 2 Select and configure the desired criteria, then click Next. The Evaluation page appears.  
|            | To apply the tag automatically, you must configure criteria for the tag.  
|            | 3 Select whether systems are evaluated against the tag's criteria only when the Run Tag Criteria action is taken, or also at each agent-server communication, then click Next. The Preview page appears.  
|            | These options are unavailable if criteria was not configured. When systems are evaluated against a tag's criteria, the tag is applied to systems that match the criteria and have not been excluded from the tag.  
|            | 4 Verify the information on this page, then click Save.  
|            | If the tag has criteria, this page displays the number of systems that will receive this tag when evaluated against its criteria.  
|            | The tag is updated under the selected tag group in the Tag Tree on the Tag Catalog page. |
| **Delete** | When you click Delete, the confirmation dialog box appears. Click OK to delete the tag. |
### Create, delete, and modify tag subgroups

Tag subgroups allow you to nest tag groups up to four levels deep, with up to 1,000 tag subgroups under a single parent group. These tag groups allow you to use criteria-based sorting to automatically add systems to the correct groups.

Use these steps to create, delete, or modify a tag subgroup.

#### Task

1. Click **Menu | Systems | Tag Catalog**.
2. From the **Tag Catalog** page, select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| Create tag subgroup. | 1. In the hierarchical **Tag Tree** list, select the tag group (or parent tag group) where you want to create the new tag subgroup.  
   2. Click **New Subgroup** to see the **New Subgroup** dialog box.  
   3. In the **Name** field, type a descriptive name for the new tag subgroup.  
   4. When finished, click **OK** to create the new tag subgroup. |
| Rename tag subgroup. | 1. In the hierarchical **Tag Tree** list, select the tag subgroup you want to rename.  
   2. Click **Tag Tree Actions | Rename Group** to see the **Rename Subgroup** dialog box.  
   3. In the **Name** field, type the new name for the tag subgroup.  
   4. When finished, click **OK** and the tag subgroup is renamed. |
| Delete tag subgroup. | 1. In the hierarchical **Tag Tree** list, select the tag subgroup you want to delete.  
   2. Click **Actions | Delete** and an **Action: Delete** confirmation dialog box appears.  
   3. If you are sure you want to delete the tag subgroup, click **OK** and the tag subgroup is removed. |

### Exclude systems from automatic tagging

Prevent systems from having specific tags applied.

Alternatively, you can use a query to collect systems, then exclude the desired tags from those systems from the query results.
**Task**

For option definitions, click ? in the interface.

1. Click __Menu | Systems | System Tree | Systems__, then select the group that contains the systems in the __System Tree__.  
2. Select one or more systems in the Systems table, then click __Actions | Tag | Exclude Tag__.  
3. In the __Exclude Tag__ dialog box, select the desired tag, or tag group, to exclude from the selected systems from the drop-down list, then click __OK__.  
4. Verify the systems have been excluded from the tag:  
   a. Click __Menu | Systems | Tag Catalog__, then select the desired tag, or tag group, in the list of tags and the __Tag Details__ page appears.  
   b. Next to __Systems with tag__, click the link for the number of systems excluded from criteria-based tag application. The __Systems Excluded from the Tag__ page appears.  
   c. Verify the desired systems are in the list.

**Apply tags to selected systems**

Apply a tag manually to selected systems in the __System Tree__.  

**Task**

For option definitions, click ? in the interface.

1. Click __Menu | Systems | System Tree | Systems__, then select the group that contains the wanted system.  
2. Select the wanted systems, then click __Actions | Tag | Apply Tag__.  
3. In the __Apply Tag__ dialog box, select the wanted tag from the drop-down list to apply to the selected systems, then click __OK__.  
4. Verify that the tags have been applied:  
   a. Click __Menu | Systems | Tag Catalog__ select, then select the wanted tag, or tag group, in the list of tags.  
   b. Next to __Systems with tag__ in the details pane, click the link for the number of systems tagged manually. The __Systems with Tag Applied Manually__ page appears.  
   c. Verify that the wanted systems are in the list.

**Apply criteria-based tags to all matching systems**

Apply a criteria-based tag to all non-excluded systems that match the specified criteria.

**Task**

For option definitions, click ? in the interface.

1. Click __Menu | Systems | Tag Catalog__, then select a tag or tag group from the __Tags__ list.  
2. Click __Actions | Run Tag Criteria__.  

3 On the Action panel, select whether to reset manually tagged and excluded systems. Resetting manually tagged and excluded systems removes the tag from systems that don’t match the criteria, and applies the tag to systems which match criteria but were excluded from receiving the tag.

4 Click OK.

5 Verify that the systems have the tag applied:
   a Click Menu | Systems | Tag Catalog, then select the wanted tag, or tag group, in the list of tags.
   b Next to Systems with tag in the details pane, click the link for the number of systems with tag applied by criteria. The Systems with Tag Applied by Criteria page appears.
   c Verify that the wanted systems are in the list.

The tag is applied to all systems that match its criteria.

Apply criteria-based tags on a schedule
Schedule a regular task that applies a tag to all systems that match the tag criteria.

Task
For option definitions, click ? in the interface.

1 Click Menu | Automation | Server Tasks, then click Actions | New Task. The Server Task Builder page appears.

2 On the Description page, name and describe the task and select whether the task is enabled once it is created, then click Next. The Actions page appears.

3 Select Run Tag Criteria from the drop-down list, then select a tag from the Tag drop-down list.

4 Select whether to reset manually tagged and excluded systems. Resetting manually tagged and excluded systems removes the tag on systems that don’t match the criteria and applies the tag to systems that match criteria but were excluded from receiving the tag.

5 Click Next to open the Schedule page.

6 Schedule the task for the times you want, then click Next.

7 Review the task settings, then click Save.

The server task is added to the list on the Server Tasks page. If you selected to enable the task in the Server Task Builder wizard, it runs at the next scheduled time.

How a system is added to the System Tree when sorted
When the agent communicates with the server for the first time, the server uses an algorithm to place the system in the System Tree. When it cannot find an appropriate location for a system, it puts the system in the Lost&Found group.

On each agent-server communication, the server attempts to locate the system in the System Tree by agent GUID (only systems whose agents have already called into the server for the first time have an agent GUID in the database). If a matching system is found, it is left in its existing location.
If a matching system is not found, the server uses an algorithm to sort the systems into the appropriate groups. Systems can be sorted into any criteria-based group in the System Tree, no matter how deep it is in the structure, as long as each parent group in the path does not have non-matching criteria. Parent groups of a criteria-based subgroup must have either no criteria or matching criteria.

The sorting order assigned to each subgroup (defined in the Group Details tab) determines the order that subgroups are considered by the server when it searches for a group with matching criteria.

1. The server searches for a system without an agent GUID (its agent has never called in before) with a matching name in a group with the same name as the domain. If found, the system is placed in that group. This can happen after the first Active Directory or NT domain synchronization, or when you have manually added systems to the System Tree.

2. If a matching system is still not found, the server searches for a group of the same name as the domain where the system originates. If such a group is not found, one is created under the Lost&Found group, and the system is placed there.

3. Properties are updated for the system.

4. The server applies all criteria-based tags to the system if the server is configured to run sorting criteria at each agent-server communication.

5. What happens next depends on whether System Tree sorting is enabled on both the server and the system.
   - If System Tree sorting is disabled on either the server or the system, the system is left where it is.
   - If System Tree sorting is enabled on the server and system, the system is moved based on the sorting criteria in the System Tree groups.

   Systems that are added by Active Directory or NT Domain synchronization have System Tree sorting disabled by default, so they are not sorted on the first agent-server communication

6. The server considers the sorting criteria of all top-level groups according to the sorting order on the My Organization group’s Group Details tab. The system is placed in the first group with matching criteria or a catch-all group it considers.
   - Once sorted into a group, each of its subgroups are considered for matching criteria according to their sorting order on the Group Details tab.
   - This continues until there is no subgroup with matching criteria for the system, and is placed in the last group found with matching criteria.

7. If such a top-level group is not found, the subgroups of top-level groups (without sorting criteria) are considered according to their sorting.

8. If such a second-level criteria-based group is not found, the criteria-based third-level groups of the second-level unrestricted groups are considered.

   Subgroups of groups with criteria that doesn’t match are not considered. A group must have matching criteria or have no criteria in order for its subgroups to be considered for a system.
This process continues down through the System Tree until a system is sorted into a group.

<table>
<thead>
<tr>
<th>Informative note</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the server setting for System Tree sorting is configured to sort only on the first agent-server communication, a flag is set on the system. The flag means that the system can never be sorted again at agent-server communication unless the server setting is changed to enable sorting on every agent-server communication.</td>
</tr>
</tbody>
</table>

If the server cannot sort the system into any group, it is placed in the Lost&Found group within a subgroup that is named after its domain.

### Enable System Tree sorting on the server

In order for systems to be sorted, System Tree sorting must be enabled on both the server and the desired systems.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Server Settings**, then select **System Tree Sorting** in the Setting Categories list and click **Edit**.

2. Select whether to sort systems only on the first agent-server communication or on each agent-server communication.

   If you selected to sort only on the first agent-server communication, all enabled systems are sorted on their next agent-server communication and are never sorted again for as long as this option is selected. However, these systems can be sorted again manually by taking the Sort Now action, or by changing this setting to sort on each agent-server communication.

   If you selected to sort on each agent-server communication, all enabled systems are sorted at each agent-server communication as long as this option is selected.

### Create and populate System Tree groups

Create System Tree groups and populate the groups with systems, either by typing NetBIOS names for individual systems or by importing systems directly from your network.

You can also populate groups by dragging selected systems to any group in the System Tree. Drag-and-drop also allows you to move groups and subgroups within the System Tree.

There is no single way to organize a System Tree, and because every network is different, your System Tree organization can be as unique as your network layout. Although you won’t use each method offered, you can use more than one.

For example, if you use Active Directory in your network, consider importing your Active Directory containers rather than your NT domains. If your Active Directory or NT domain organization does not make sense for security management, you can create your System Tree in a text file and import it into your System Tree. If you have a smaller network, you can create your System Tree by hand and add each system manually.
Tasks

- **Create groups manually on page 124**
  Create System Tree subgroups. Populate these subgroups with systems by typing NetBIOS names for individual systems, or by importing systems directly from your network.

- **Manually add systems to an existing group on page 125**
  Import systems from your Network Neighborhood to groups. You can also import a network domain or Active Directory container.

- **Export systems from the System Tree on page 125**
  Export a list of systems from the System Tree to a .txt file for later use. Export at the group or subgroup level while retaining the System Tree organization.

- **Import systems from a text file on page 126**
  Create a text file of systems and groups to import into the System Tree.

- **Sort systems into criteria-based groups on page 127**
  Configure and implement sorting to group systems. For systems to sort into groups, sorting must be enabled on the server and the desired systems, and sorting criteria and the sorting order of groups must be configured.

- **Import Active Directory containers on page 129**
  Import systems from Active Directory containers directly into your System Tree by mapping Active Directory source containers to System Tree groups.

- **Import NT domains into an existing group on page 130**
  Import systems from an NT domain into a group you created manually.

- **Schedule System Tree synchronization on page 132**
  Schedule a server task that updates the System Tree with changes in the mapped domain or Active Directory container.

- **Manually update a synchronized group with an NT domain on page 133**
  Update a synchronized group with changes to the associated NT domain.

Create groups manually

Create System Tree subgroups. Populate these subgroups with systems by typing NetBIOS names for individual systems, or by importing systems directly from your network.

For option definitions, click ? in the interface.

Task

1. Open the New Subgroups dialog box.
   a. Click Menu | Systems | System Tree.
   b. Select a group.
   c. Click New Subgroups.

   ![Create more than one subgroup at a time.]

2. Type the desired name then click OK. The new group appears in the System Tree.
Repeat as necessary until you are ready to populate the groups with the desired systems. Add systems to the **System Tree** and ensure they get to the desired groups by:

- Typing system names manually.
- Importing them from NT domains or Active Directory containers. You can regularly synchronize a domain or a container to a group for ease of maintenance.
- Setting up IP address-based or tag-based sorting criteria on the groups. When agents check in from systems with matching IP address information or matching tags, they are automatically placed in the appropriate group.

### Manually add systems to an existing group

Import systems from your Network Neighborhood to groups. You can also import a network domain or Active Directory container.

For option definitions, click ? in the interface.

#### Task

1. Open the **New Systems** page.

   a. Click **Menu** | **Systems** | **System Tree**.

   b. Click **New Systems**.

2. Select whether to deploy the McAfee Agent to the new systems, and whether the systems are added to the selected group, or to a group according to sorting criteria.

3. Next to **Target systems**, type the NetBIOS name for each system in the text box, separated by commas, spaces, or line breaks. Alternatively, click **Browse** to select the systems.

4. If you selected **Push agents and add systems to the current group**, you can enable automatic **System Tree** sorting. Do this to apply the sorting criteria to these systems.

Specify the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent version</td>
<td>Select the agent version to deploy.</td>
</tr>
<tr>
<td>Installation path</td>
<td>Configure the agent installation path or accept the default.</td>
</tr>
<tr>
<td>Credentials for agent installation</td>
<td>Type valid credentials to install the agent.</td>
</tr>
<tr>
<td>Number of attempts</td>
<td>Type an integer, using zero for continuous attempts.</td>
</tr>
<tr>
<td>Retry interval</td>
<td>Type the number seconds between retries.</td>
</tr>
<tr>
<td>Abort After</td>
<td>Type the number of minutes before aborting the connection.</td>
</tr>
<tr>
<td>Push Agent using</td>
<td>Select either a specific Agent Handler or all Agent Handlers.</td>
</tr>
</tbody>
</table>

5. Click **OK**.

### Export systems from the System Tree

Export a list of systems from the System Tree to a .txt file for later use. Export at the group or subgroup level while retaining the System Tree organization.

It can be useful to have a list of the systems in your System Tree. You can import this list into your McAfee ePO Server to quickly restore your previous structure and organization.

This task does not remove systems from your System Tree. It creates a .txt file that contains the names and structure of systems in your System Tree.
Task
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree. The System Tree page opens.

2 Select the group or subgroup containing the systems you want to export, then click System Tree Actions | Export Systems. The Export Systems page opens.

3 Select whether to export:
   • All systems in this group — Exports the systems in the specified Source group, but does not export systems listed in nested subgroups under this level.
   • All systems in this group and subgroups — Exports all systems at and below this level.

4 Click OK.

   The Export page opens. You can click the systems link to view the system list, or right-click the link to save a copy of the ExportSystems.txt file.

Import systems from a text file
Create a text file of systems and groups to import into the System Tree.

Tasks
- Create a text file of groups and systems on page 126
  Create a text file of the NetBIOS names for your network systems that you want to import into a group. You can import a flat list of systems, or organize the systems into groups.
- Import systems and groups from a text file on page 127
  Import systems or groups of systems into the System Tree from a text file you have created and saved.

Create a text file of groups and systems
Create a text file of the NetBIOS names for your network systems that you want to import into a group. You can import a flat list of systems, or organize the systems into groups.

Define the groups and their systems by typing the group and system names in a text file. Then import that information into ePolicy Orchestrator. For large networks, use network utilities, such as the NETDOM.EXE utility available with the Microsoft Windows Resource Kit, to generate text files containing complete lists of the systems on your network. Once you have the text file, edit it manually to create groups of systems, and import the entire structure into the System Tree.

Regardless of how you generate the text file, you must use the correct syntax before importing it.

Task
1 List each system separately on its own line. To organize systems into groups, type the group name followed by a backslash (\), then list the systems belonging to that group beneath it, each on a separate line.

   GroupA\system1
   GroupA\system2
   GroupA\GroupB\system3
   GroupC\GroupD
2 Verify the names of groups and systems, and the syntax of the text file, then save the text file to a
temporary folder on your server.

**Import systems and groups from a text file**
Import systems or groups of systems into the System Tree from a text file you have created and saved.
For option definitions, click ? in the interface.

**Task**
1 Open the New Systems page.
   a Click Menu | Systems | System Tree.
   b Click New Systems.
2 Select Import systems from a text file into the selected group, but do not push agents.
3 Select whether the import file contains:
   • Systems and System Tree Structure
   • Systems only (as a flat list)
4 Click Browse, then select the text file.
5 Select what to do with systems that already exist elsewhere in the System Tree.
6 Click OK.

The systems are imported to the selected group in the System Tree. If your text file organized the
systems into groups, the server creates the groups and imports the systems.

**Sort systems into criteria-based groups**
Configure and implement sorting to group systems. For systems to sort into groups, sorting must be
enabled on the server and the desired systems, and sorting criteria and the sorting order of groups
must be configured.

**Tasks**
- **Add sorting criteria to groups on page 127**
  Sorting criteria for System Tree groups can be based on IP address information or tags.
- **Enable System Tree sorting on the server on page 123**
  In order for systems to be sorted, System Tree sorting must be enabled on both the server
  and the desired systems.
- **Enable or disable System Tree sorting on systems on page 128**
  The sorting status of a system determines whether it can be sorted into a criteria-based
group.
- **Sort systems manually on page 128**
  Sort selected systems into groups with criteria-based sorting enabled.

**Add sorting criteria to groups**
Sorting criteria for System Tree groups can be based on IP address information or tags.

**Task**
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Group Details and select the group in the System Tree.
2 Next to Sorting criteria click Edit. The Sorting Criteria page for the selected group appears.
3 Select **Systems that match any of the criteria below**, then the criteria selections appear.

Although you can configure multiple sorting criteria for the group, a system only has to match a single criterion to be placed in this group.

4 Configure the criterion. Options include:
   - **IP addresses** — Use this text box to define an IP address range or subnet mask as sorting criteria. Any system whose address falls within it is sorted into this group.
   - **Tags** — Add specific tags to ensure systems with such tags that come into the parent group are sorted into this group.

5 Repeat as necessary until sorting criteria reconfigured for the group, then click **Save**.

**Enable System Tree sorting on the server**

In order for systems to be sorted, System Tree sorting must be enabled on both the server and the desired systems.

**Task**

For option definitions, click ? in the interface.

1 Click **Menu | Configuration | Server Settings**, then select **System Tree Sorting** in the Setting Categories list and click **Edit**.

2 Select whether to sort systems only on the first agent-server communication or on each agent-server communication.

If you selected to sort only on the first agent-server communication, all enabled systems are sorted on their next agent-server communication and are never sorted again for as long as this option is selected. However, these systems can be sorted again manually by taking the Sort Now action, or by changing this setting to sort on each agent-server communication.

If you selected to sort on each agent-server communication, all enabled systems are sorted at each agent-server communication as long as this option is selected.

**Enable or disable System Tree sorting on systems**

The sorting status of a system determines whether it can be sorted into a criteria-based group. You can change the sorting status on systems in any table of systems (such as query results), and also automatically on the results of a scheduled query.

For option definitions, click ? in the interface.

**Task**

1 Click **Menu | Systems | System Tree | Systems**, then select the desired systems.

2 Click **Actions | Directory Management | Change Sorting Status**, then select whether to enable or disable System Tree sorting on selected systems.

3 In the Change Sorting Status dialog box select whether to disable or enable system tree sorting on the selected system.

Depending on the server setting for System Tree sorting, these systems are sorted on the next agent-server communication. Otherwise, they can only be sorted with the Sort Now action.

**Sort systems manually**

Sort selected systems into groups with criteria-based sorting enabled.
Task
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Systems and select the group that contains the desired systems.

2 Select the systems then click Actions | Directory Management | Sort Now. The Sort Now dialog box appears.

   If you want to preview the results of the sort before sorting, click Test Sort instead. (However, if you move systems from within the Test Sort page, all selected systems are sorted, even if they have System Tree sorting disabled.)

3 Click OK to sort the systems.

Import Active Directory containers
Import systems from Active Directory containers directly into your System Tree by mapping Active Directory source containers to System Tree groups.

Mapping Active Directory containers to groups allows you to:

• Synchronize the System Tree structure to the Active Directory structure so that when containers are added or removed in Active Directory, the corresponding group in the System Tree is added or removed.

• Delete systems from the System Tree when they are deleted from Active Directory.

• Prevent duplicate entries of systems in the System Tree when they exist in other groups.

For option definitions, click ? in the interface.

Task

1 Click Menu | Systems | System Tree | Group Details, then select a group in the System Tree you want to map an Active Directory container to.

   You cannot synchronize the Lost&Found group of the System Tree.

2 Next to Synchronization type, click Edit. The Synchronization Settings page for the selected group appears.

3 Next to Synchronization type, select Active Directory. The Active Directory synchronization options appear.

4 Select the type of Active Directory synchronization you want to occur between this group and the Active Directory container (and its subcontainers):

   • Systems and container structure — Select this option if you want this group to truly reflect the Active Directory structure. When synchronized, the System Tree structure under this group is modified to reflect that of the Active Directory container it’s mapped to. When containers are added or removed in Active Directory, they are added or removed in the System Tree. When systems are added, moved, or removed from Active Directory, they are added, moved, or removed from the System Tree.

   • Systems only — Select this option if you only want the systems from the Active Directory container (and non-excluded subcontainers) to populate this group, and this group only. No subgroups are created when mirroring Active Directory.

5 Select whether to create a duplicate entry for systems that exist in another group of the System Tree.

If you are using Active Directory synchronization as a starting point for security management, and plan to use System Tree management functionality after mapping your systems, do not select this option.
In the **Active Directory domain** section, you can:

- Type the fully-qualified domain name of your Active Directory domain.
- Select from a list of already registered LDAP servers.

Next to **Container**, click **Add** and select a source container in the **Select Active Directory Container** dialog box, then click **OK**.

To exclude specific subcontainers, click **Add** next to **Exceptions** and select a subcontainer to exclude, then click **OK**.

Select whether to deploy the McAfee Agent automatically to new systems. If you do, configure the deployment settings.

McAfee recommends that you do not deploy the McAfee Agent during the initial import if the container is large. Deploying the 3.62 MB McAfee Agent package to many systems at once can cause network traffic issues. Instead, import the container, then deploy the McAfee Agent to groups of systems at a time, rather than all at once. Consider revisiting this page and selecting this option after the initial McAfee Agent deployment, so that the McAfee Agent is installed automatically on new systems added to Active Directory.

Select whether to delete systems from the **System Tree** when they are deleted from the Active Directory domain. Optionally choose whether to remove agents from the deleted systems.

To synchronize the group with Active Directory immediately, click **Synchronize Now**.

Clicking **Synchronize Now** saves any changes to the synchronization settings before synchronizing the group. If you have an Active Directory synchronization notification rule enabled, an event is generated for each system that is added or removed. These events appear in the **Audit Log**, and are queryable. If you deployed agents to added systems, the deployment is initiated to each added system. When the synchronization completes, the **Last Synchronization** time is updated, displaying the time and date when the synchronization finished, not when any agent deployments completed.

You can schedule an NT Domain/Active Directory synchronization server task for the first synchronization. This server task is useful if you are deploying agents to new systems on the first synchronization, when bandwidth is a larger concern.

When the synchronization completes, view the results with the **System Tree**.

Once the systems are imported, distribute agents to them if you did not select to do so automatically.

Consider setting up a recurring NT Domain/Active Directory synchronization server task to keep your **System Tree** up-to-date with any changes to your Active Directory containers.

**Import NT domains into an existing group**

Import systems from an NT domain into a group you created manually.

You can populate groups automatically by synchronizing entire NT domains with specified groups. This approach is an easy way to add all systems in your network to the **System Tree** at once as a flat list with no system description.

If the domain is large, you can create subgroups to assist with policy management or organization. To do this, first import the domain into a group of your **System Tree**, then manually create logical subgroups.

To manage the same policies across several domains, import each of the domains into a subgroup under the same group. The subgroups will inherit the policies set for the top-level group.

When using this method:
• Set up IP address or tag sorting criteria on subgroups to automatically sort the imported systems.

• Schedule a recurring NT Domain/Active Directory synchronization server task for easy maintenance.

For option definitions, click ? in the interface.

**Task**

1. Click **Menu | Systems | System Tree | Group Details** and select or create a group in the **System Tree**.

2. Next to **Synchronization type**, click **Edit**. The **Synchronization Settings** page for the selected group appears.

3. Next to **Synchronization type**, select **NT Domain**. The domain synchronization settings appear.

4. Next to **Systems that exist elsewhere in the System Tree**, select what to do with systems that exist in another group of the **System Tree**.

   We don’t recommend selecting **Add systems to the synchronized group and leave them in their current System Tree location**, especially if you are only using the NT domain synchronization as a starting point for security management.

5. Next to **Domain**, click **Browse** and select the NT domain to map to this group, then click **OK**. Alternatively, you can type the name of the domain directly in the text box.

   When typing the domain name, do not use the fully-qualified domain name.

6. Select whether to deploy the McAfee Agent automatically to new systems. If you do so, configure the deployment settings.

   We recommend that you do not deploy the McAfee Agent during the initial import if the domain is large. Deploying the 3.62-3B McAfee Agent package to many systems at once can cause network traffic issues. Instead, import the domain, then deploy the agent to smaller groups of systems at a time, rather than all at once. Once you have finished deploying the McAfee Agent, consider revisiting this page and selecting this option after the initial agent deployment. That way, the McAfee Agent is installed automatically on any new systems that are added to the group (or its subgroups) by domain synchronization.

7. Select whether to delete systems from the **System Tree** when they are deleted from the NT domain. You can optionally choose to remove agents from deleted systems.

8. To synchronize the group with the domain immediately, click **Synchronize Now**, then wait while the systems in the domain are added to the group.

Clicking **Synchronize Now** saves changes to the synchronization settings before synchronizing the group. If you have an NT domain synchronization notification rule enabled, an event is generated for each system added or removed. These events appear in the **Audit Log**, and are queryable. If you selected to deploy agents to added systems, the deployment is initiated to each added system. When the synchronization is complete, the **Last Synchronization** time is updated. The time and date are when the synchronization finished, not when any agent deployments completed.
9 If you want to synchronize the group with the domain manually, click **Compare and Update**.

- Clicking **Compare and Update** saves any changes to the synchronization settings.

  a If you are going to remove any systems from the group with this page, select whether to remove their agents when the system is removed.

  b Select the systems to add to and remove from the group as necessary, then click **Update Group** to add the selected systems. The **Synchronize Setting** page appears.

10 Click **Save**, then view the results in the **System Tree** if you clicked **Synchronize Now** or **Update Group**.

Once the systems are added to the **System Tree**, distribute agents to them if you did not select to deploy agents as part of the synchronization.

- Consider setting up a recurring NT Domain/Active Directory synchronization server task to keep this group up-to-date with new systems in the NT domain.

### Schedule System Tree synchronization

Schedule a server task that updates the **System Tree** with changes in the mapped domain or Active Directory container.

Depending on group synchronization settings, this task:

- Adds new systems on the network to the specified group.
- Adds new corresponding groups when new Active Directory containers are created.
- Deletes corresponding groups when Active Directory containers are removed.
- Deploys agents to new systems.
- Removes systems that are no longer in the domain or container.
- Applies policies and tasks of the site or group to new systems.
- Prevents or allows duplicate entries of systems that still exist in the **System Tree** that you've moved to other locations.

- The agent cannot be deployed to all operating systems in this manner. You might need to distribute the agent manually to some systems.

For option definitions, click ? in the interface.

### Task

1 Click **Menu** | **Automation** | **Server Tasks**, then click **Actions** | **New Task**. The **Server Task Builder** opens.

2 On the **Description** page, name the task and choose whether it is enabled once it is created, then click **Next**. The **Actions** page appears.

3 From the drop-down list, select **Active Directory Synchronization/NT Domain**.

4 Select whether to synchronize all groups or selected groups. If you are synchronizing only some synchronized groups, click **Select Synchronized Groups** and select specific ones.

5 Click **Next** to open the **Schedule** page.
6 Schedule the task, then click Next.

7 Review the task details, then click Save.

In addition to the task running at the scheduled time, you can run this task immediately by clicking Run next to the task on the Server Tasks page.

Manually update a synchronized group with an NT domain

Update a synchronized group with changes to the associated NT domain. The update includes the following changes:

- Adds systems currently in the domain.
- Removes systems from your System Tree that are no longer in the domain.
- Removes agents from all systems that no longer belong to the specified domain.

**Task**

For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Group Details, then select the group that is mapped to the NT domain.

2 Next to Synchronization type, click Edit. The Synchronization Settings page appears.

3 Select NT Domain, then click Compare and Update near the bottom of the page. The Manually Compare and Update page appears.

4 If you are removing systems from the group, select whether to remove the agents from systems that are removed.

5 Click Add All or Add to import systems from the network domain to the selected group.

6 If you are removing systems from the group, select whether to remove the agents from systems that are removed.

5 Click Remove All or Remove to delete systems from the selected group.

6 Click Update Group when finished.

Move systems within the System Tree

Move systems from one group to another in the System Tree. You can move systems from any page that displays a table of systems, including the results of a query.

In addition to the steps below, you can also drag-and-drop systems from the Systems table to any group in the System Tree.

Even if you have a perfectly organized System Tree that mirrors your network hierarchy, and use automated tasks and tools to regularly synchronize your System Tree, you may need to move systems manually between groups. For example, you may need to periodically move systems from the Lost&Found group.

**Task**

For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Systems and then browse to and select the systems.

Select whether to enable or disable System Tree sorting on the selected systems when they are moved.

Select the group in which to place the systems, then click OK.

Transfer systems between servers

Before you can transfer systems between McAfee ePO servers you must configure the agent-server secure communication key.

**Before you begin**
Configure these requirements before transferring systems between McAfee ePO servers:

- Interchange the agent-server secure communication key between the servers.

These steps accommodate two-way transfer. If you prefer to enable only one-way transfers you do not need to import the key from the target server into the main server.

1. Export the agent-server communication key from both the servers.
2. Import the agent-server secure communication key from server A to Server B.
3. Import the agent-server secure communication key from server B to server A.

- Register the server that you want to transfer the system to.

Be sure to enable Transfer Systems on the Details page of the Registered Server Builder Wizard.

For option definitions, click ? in the interface.

**Task**

1. Click Menu | Systems | System Tree, then select the systems you want to transfer.
2. Click Actions | Agent | Transfer Systems. The Transfer Systems dialog box appears.
3. Select the desired server from the drop-down menu and click OK.

Once a managed system has been marked for transfer, two agent-server communications must occur before the system is displayed in the System Tree of the target server. The length of time required to complete both agent-server communications depends on your configuration. The default agent-server communication interval is one hour.
10 Agent-server communication

The ePolicy Orchestrator interface includes pages where you can configure McAfee Agent tasks and policies, and where you can view system properties, agent properties, and other McAfee product information.

Contents
- How agent-server communication works
- SuperAgents and how they work
- Agent relay capability
- Respond to policy events
- Run client tasks immediately
- Locate inactive agents
- Windows system and product properties reported by the agent
- Queries provided by the McAfee Agent
- Allow agent deployment credentials to be cached
- Change agent communication ports
- View McAfee Agent and product properties
- Security keys

How agent-server communication works

The agent has to talk to an ePolicy Orchestrator server periodically to ensure all settings are current, send events and so on. These communications are referred to as agent-to-server communication. During each Agent-to-server communication, the agent collects its current system properties, as well as events that have not yet been sent, and sends them to the server. The server sends new or changed policies and tasks to the agent, and the repository list if it has changed since the last Agent-to-server communication. The agent enforces the new policies locally on the managed system and applies any task or repository changes.

The ePolicy Orchestrator server uses an industry-standard Transport Layer Security (TLS) network protocol for secure network transmissions.

When the agent is first installed, it calls in to the server at a random time within six seconds. Thereafter, the agent calls in whenever one of the following occurs:

- The Agent-to-server communication interval (ASCI) elapses.
- Agent wake-up calls are sent from McAfee ePO or Agent Handlers.
- A scheduled wake-up task runs on the client systems.
- Communication is initiated manually from the managed system.
- Agent wake-up calls sent from the ePolicy Orchestrator server
Agent-server communication

Agent-server communication interval
The agent-server communication interval (ASCI) determines how often the McAfee Agent calls into the McAfee ePO server.

The agent-server communication interval is set on the General tab of the McAfee Agent Policy page. The default setting of 60 minutes means that the agent contacts the McAfee ePO server once every hour. When deciding whether to modify the interval, consider that the agent performs each of the following actions at each ASCI:

- Collects and sends its properties.
- Sends non-priority events that have occurred since the last agent-server communication.
- Enforces policies.
- Receives new policies and tasks. This action might trigger other resource-consuming actions.

Although these activities do not burden any one computer, a number of factors can cause the cumulative demand on the network or McAfee ePO servers, or on Agent Handlers to be significant, including:

- How many systems are managed by ePolicy Orchestrator
- If your organization has stringent threat response requirements.
- If the network or physical location of clients in relation to servers or Agent Handlers is highly distributed
- If there is inadequate available bandwidth

In general, if your environment includes these variables, you want to perform agent-server communications less frequently. For individual clients with critical functions, you might want to set a more frequent interval.

Agent-server communication interruption handling
Interruption handling resolves issues that prevent a system from connecting with a McAfee ePO server. Communication interruptions can happen for many of reasons, and the Agent-Server connection algorithm is designed to reattempt communication if its first attempt fails.

The McAfee Agent cycles through the following connection methods six times or until one of a set of responses is returned.

1. IP address
2. Fully qualified domain name
3. NetBIOS

The agent iterates through those three connection methods in that order up to six times for a total of 18 connection attempts. There is no delay between connection attempts. The agent stops this cycle if a connection attempt results in any of the following:

- No error
- Download failed
- Upload failed
- Agent is shutting down
- Transfer aborted
• Server busy (status code from McAfee ePO server)
• Upload success (status code from McAfee ePO server)
• Agent needs new keys
• No package to receive (status code from McAfee ePO server)
• Agent needs to regenerate GUID (status code from McAfee ePO server)

Other results such as connection refused, failed to connect, connection timeout, or other errors cause the agent to retry immediately using connection method in the list until the next ASCI nears.

Wake-up calls and tasks
A McAfee Agent wake-up call triggers an immediate Agent-Server Communication rather than waiting for the current Agent-Server Communication Interval (ASCI) to elapse.

There are two ways to issue a wake-up call:

• Manually from the server — This is the most common approach and requires the agent wake-up communication port be open.

• On a schedule set by the administrator — This approach is useful when manual agent-to-server communication is disabled by policy. The administrator can create and deploy a wake-up task, which wakes up the agent and initiates Agent-Server Communication.

Some reasons for issuing an agent wake-up call are:
• You make a policy change that you want to enforce immediately, without waiting for the scheduled ASCI to expire.
• You created a new task that you want to run immediately. The Run Task Now creates a task, then assigns it to specified client systems and sends wake-up calls.
• A query generated a report indicating that a client is out of compliance, and you want to test its status as part of a troubleshooting procedure.

If you have converted a particular agent on a Windows system to a SuperAgent, it can issue wake-up calls to designated network broadcast segments. SuperAgents distribute the bandwidth impact of the agent wake-up call.

Send manual wake-up calls to individual systems
Manually sending an agent or SuperAgent wake-up call to systems in the System Tree is useful when you make policy changes and you want agents to call in to send or receive updated information before the next agent to server communication.

Task
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree, then select the group that contains the target systems.

2 Select the systems from the list, then click Actions | Agent | Wake Up Agents.

3 Make sure the systems you selected appear in the Target Systems section.

4 Next to Wake-up call type, select whether to send an Agent Wake-Up Call or SuperAgent Wake-Up Call as appropriate.
5. Accept the default Randomization (0 minutes) or type a different value (0 - 60 minutes). Consider the number of systems that are receiving the wake-up call when it is sent immediately, and how much bandwidth is available. If you type 0, agents respond immediately.

6. To send incremental product properties as a result of this wake-up call, deselect Get full product properties... The default is to send full product properties.

7. To update all policies and tasks during this wake-up call, select Force complete policy and task update.

8. Enter a Number of attempts, Retry interval, and Abort after settings for this wake-up call if you do not want the default values.

9. Select whether to wake-up agent using All Agent Handlers or Last Connected Agent Handlers.

10. Click OK to send the agent or SuperAgent wake-up call.

Send manual wake-up calls to a group

An agent or SuperAgent wake-up call can be sent to an entire System Tree group in a single task. This is useful when you have made policy changes and want agents to call in to send or receive the updated information before the next agent to server communication.

Task

For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree.

2. Select the target group from the System Tree and click the Group Details tab.

3. Click Actions | Wake Up Agents.

4. Make sure the selected group appears next to Target group.

5. Select whether to send the agent wake-up call to All systems in this group or to All systems in this group and subgroups.

6. Next to Type, select whether to send an Agent wake-up call or SuperAgent wake-up call.

7. Accept the default Randomization (0 minutes), or type a different value (0 - 60 minutes). If you type 0, agents awaken immediately.

8. To send minimal product properties as a result of this wake-up call, deselect Get full product properties.... The default is to send full product properties.

9. To update all policies and tasks during this wake-up call, select Force complete policy and task update.

10. Click OK to send the agent or SuperAgent wake-up call.

SuperAgents and how they work

A SuperAgent is an agent that acts as an intermediary between the McAfee ePO server and other agents in the same network broadcast segment. You can only convert a Windows agent to SuperAgent.

The SuperAgent caches information received from an ePolicy Orchestrator server, the Master Repository, or a mirrored Distributed Repository, and distributes it to the agents in its network subnet. The Lazy Caching feature allows SuperAgents to retrieve data from ePolicy Orchestrator servers only when requested by a local agent node. Creating a hierarchy of SuperAgent along with lazy caching further saves bandwidth and minimizes the wide-area network traffic.
A SuperAgent also broadcasts wake-up calls to other agents located on the same network subnet. The SuperAgent receives a wake-up call from the ePolicy Orchestrator server, then wakes up the agents in its subnet.

This is an alternative to sending ordinary agent wake-up calls to each agent in the network or sending agent wake-up task to each computer.

**SuperAgents and broadcast wake-up calls**

Use agent wake-up calls to initiate agent-server communication, consider converting an agent on each network broadcast segment into a SuperAgent. SuperAgents distribute the bandwidth load of concurrent wake-up calls. Instead of sending agent wake-up calls from the server to every agent, the server sends the SuperAgent wake-up call to SuperAgents in the selected System Tree segment.

The process is:

1. Server sends a wake-up call to all SuperAgents.
2. SuperAgents broadcast a wake-up call to all agents in the same broadcast segment.
3. All notified agents (regular agents notified by a SuperAgent and all SuperAgents) exchange data with the ePolicy Orchestrator server or Agent Handler.

When you send a SuperAgent wake-up call, agents without an operating SuperAgent on their broadcast segment are not prompted to communicate with the server.

**SuperAgent deployment tips**

To deploy enough SuperAgents to the appropriate locations, first determine the broadcast segments in your environment and select a system (preferably a server) in each segment to host a SuperAgent. If you use SuperAgents, make sure all agents are assigned a SuperAgent.

Agent and SuperAgent wake-up calls use the same secure channels. Make sure the following ports are not blocked by a firewall on the client:

- The agent wake-up communication port (8081 by default).
- The agent broadcast communication port (8082 by default).

**Convert agents to SuperAgents**

During the global updating process, when the SuperAgent receives an update from the ePolicy Orchestrator server it sends wake-up calls to all the agents in its network. Configure SuperAgent policy settings to convert an agent to SuperAgent.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Systems, then select a group under System Tree. All the systems within this group appear in the details pane.
2. Select a system, then click Actions | Agent | Modify Policies on a Single System. The Policy Assignment page for that system appears.
3. From the product drop-down list, select McAfee Agent . The policy categories under McAfee Agent are listed with the system’s assigned policy.
4. If the policy is inherited, select Break inheritance and assign the policy and settings below.
5. From the **Assigned policy** drop-down list, select the desired General policy.

   From this location, you can edit the selected policy, or create a new policy.

6. Select whether to lock policy inheritance to prevent any systems that inherit this policy from having another one assigned in its place.

7. On the **SuperAgent** tab, select **Convert agents to SuperAgents** to enable broadcast of wake-up calls.

8. Click **Save**.

9. Send an agent wake-up call.

### SuperAgent caching and communication interruptions

The SuperAgent caches the contents of its repository in a specific manner designed to minimize wide-area network (WAN) usage.

If an agent has been converted to a SuperAgent, it can cache content from the McAfee ePO server, the distributed repository, or other SuperAgents to distribute locally to other agents, reducing WAN bandwidth. To activate this, turn on **LazyCaching** in the **McAfee Agent | SuperAgent** policy options page which you access from **Menu | Policy | Policy Catalog**.

The SuperAgents cannot cache content from McAfee HTTP or FTP repositories.

### How the cache works

When a client system first requests content, the SuperAgent assigned to that system caches that content. From that point on, the cache is updated whenever a newer version of the package requested is available in the Master Repository. When a hierarchical structure of SuperAgent is created, the child SuperAgent receives the requested the content update from its parent's cache.

The SuperAgent is guaranteed only to store content required by the agents assigned to it because it does not pull any content from the repositories until requested from a client. This minimizes traffic between the SuperAgent and the repositories. While the SuperAgent is retrieving content from the repository, client system requests for that content are paused.

The SuperAgent must have access to the repository. Without this access, agents receiving updates from the SuperAgent never receive new content. Make sure your SuperAgent policy includes access to the repository.

Agents configured to use the SuperAgent as their repository receive the content cached in the SuperAgent instead of directly from the McAfee ePO server. This improves agent system performance by keeping the majority of network traffic local to the SuperAgent and its clients.

If the SuperAgent is reconfigured to use a new repository, the cache is updated to reflect the new repository.

### When the cache is flushed

SuperAgents flush content from their cache in two situations.
• If the Checking new repository content interval has expired since the last time updates were requested, the SuperAgent downloads updates from the Master Repository, processes them, and completely flushes the cache if any new content is available.

• When a global update occurs, SuperAgents receive a wake-up call that flushes all content in the cache.

  - SuperAgents are flushed every 30 minutes by default. When the SuperAgent flushes its cache, it deletes every file in its repository not listed in Replica.log. This includes any personal files you might have put in that folder.
  - SuperAgent caching in conjunction with repository replication is not recommended.

How communication interruptions are handled
When a SuperAgent receives a request for content that might be outdated, the SuperAgent attempts to contact the McAfee ePO server to see if new content is available. If the connection attempts time out, the SuperAgent distributes content from its own repository instead. This is done to ensure the requester receives content even if that content might be outdated.

SuperAgent Caching should not be used in conjunction with global updating. Both of these features serve the same function in your managed environment; keeping your distributed repositories up-to-date. However, they are not complementary features. Use SuperAgent caching when limiting bandwidth usage is your primary consideration. Use Global Updating when quick enterprise updating is your primary consideration.

SuperAgent and its hierarchy
A hierarchy of SuperAgent can serve agents in the same network with minimum network traffic utilization.

A SuperAgent caches the content updates from the ePolicy Orchestrator server or distributed repository and distributes it to the agents in the network reducing the wide area network traffic. It is always ideal to have more than one SuperAgent to balance the network load.

Ensure that you enable Lazy caching before you setting the SuperAgent hierarchy.

Arrange SuperAgent in hierarchy
General and Repository policies can be modified to enable and set SuperAgent hierarchy.

Task
For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then from the Product drop-down menu, select McAfee Agent, and from the Category drop-down menu, select General.

2. Click the My Default policy to start editing the policy. If you want to create a policy, click Actions | New Policy.

   The McAfee Default policy cannot be modified.

3. On the SuperAgent tab, select Convert agents to SuperAgents to convert the agent to a SuperAgent and update its repository with latest content.

4. Select Use systems running SuperAgents as distributed repository to use the systems that host SuperAgents as update repositories for the systems in its broadcast segment then provide the Repository Path.
5 Select **Enable Lazy caching** to allow SuperAgents to cache content when it is received from the McAfee ePO server.

6 Click **Save**.

The Policy Catalog page lists the General policies.

7 Change the **Category** to **Repository**, then click the **My Default** policy to start editing the policy. If you want to create policy, click **Actions | New Policy**.

8 On the **Repositories** tab, select **Use order in repository list**.

9 Click **Automatically allow clients to access newly-added repositories** to add new SuperAgent repositories to the list, then click **Move to Top** to arrange SuperAgents in hierarchy.

   **Arrange the hierarchy of the repositories in such a way that the parent SuperAgent is always at the top of the repository list.**

10 Click **Save**.

After setting the SuperAgent hierarchy you can create and run the **McAfee Agent Statistics** task to collect a report of network bandwidth saving. See **Collect McAfee Agent Statistics** for more details.

### Creating a hierarchy of SuperAgents

You can use the Repository policy to create the hierarchy. McAfee recommends that you create a three level hierarchy of SuperAgents in your network.

Creating a hierarchy of SuperAgent avoids repetitive download of the content update from the ePolicy Orchestrator server or distributed repository. For example, in a client network with two SuperAgents (SuperAgent 1 and SuperAgent 2) and a distributed repository, configure the hierarchy in such a way that the client systems receives the content updates from the SuperAgent 1. The SuperAgent 1 receives and caches updates from SuperAgent 2, then the SuperAgent 2 receives and caches updates from the distributed repository.

**The SuperAgents cannot cache content from McAfee HTTP or FTP repositories.**

When creating a hierarchy, ensure that the hierarchy doesn’t form a cycle of SuperAgent; for example SuperAgent 1 is configured to pull updates from SuperAgent 2, SuperAgent 2 is configured to pull updates from SuperAgent 3, and SuperAgent 3 in turn is configured to pull updates from SuperAgent 1.

To ensure that the parent SuperAgent is up-to-date with the latest content update, SuperAgent wake-up calls broadcast must be enabled. See **Enable SuperAgent wake-up call broadcast** for more details.

**If the SuperAgents don’t serve agents with latest content update, agents reject the content update received from SuperAgent and fall back to the next repository configured in the policy.**
Agent relay capability

If your network configuration blocks communication between the McAfee Agent and the McAfee ePO server, the agent can’t receive content updates, policies, or send events.

Relay capability can be enabled on agents that have direct connectivity to the ePolicy Orchestrator server or Agent Handlers to bridge communication between the client systems and the McAfee ePO server. You can configure more than one agent as a RelayServer to maintain network load balance.

- You can enable relay capability on McAfee Agent 4.8 or later.
- The ePolicy Orchestrator server can only initiate communication (for example, Show agent logs) with a directly connected agent.
- Relay capability is not supported on AIX systems.

Communicating through RelayServers

Enabling relay capability in your network converts a McAfee Agent to a RelayServer. A McAfee Agent with relay capability can access the McAfee ePO server.

When a McAfee Agent fails to connect to the McAfee ePO server, it broadcasts a message to discover any McAfee Agent with relay capability in its network. The RelayServers respond to the message and the McAfee Agent establishes a connection with the first RelayServer to respond.

Later, if a McAfee Agent fails to connect to the McAfee ePO server, it tries to connect to the RelayServer that first responded to the discovery message. The McAfee Agent discovers the RelayServers in the network at every agent-server communication, and caches the details of the first five unique RelayServers that responded to the discovery message. If the current RelayServer fails to connect with the McAfee ePO server or doesn’t have the required content update, the McAfee Agent connects to the next RelayServer available in its cache.

On a Windows client system, after the relay capability is enabled through the policy, a new service MfeServiceMgr.exe is installed. Start or stop this service to control relay capability on the client system.

Once the McAfee Agent has completed uploading or downloading content from the McAfee ePO server, the RelayServer disconnects the McAfee Agent and the McAfee ePO server.

Important considerations

- McAfee Agents require the User Datagram Protocol (UDP) to discover RelayServers in the network.
- A RelayServer connects only with the servers that are listed in its SiteList.xml file. We recommend that you include the RelayServer sitelist.xml as a super-set of the site lists of all McAfee Agents that are configured to connect through this RelayServer.

Enable relay capability

You can configure and assign policies to enable the relay capability on an agent.

If enabling a non-Windows system as a RelayServer, ensure that you manually add an exception for the cmamesh process and the service manager port to the iptables and ip6tables.
**Task**
For option definitions, click ? in the interface.

1. Click **Menu** | **Systems** | **System Tree** | **Systems**, then select a group under System Tree. All the systems within this group appear in the details pane.

2. Select a system, then click **Actions** | **Agent** | **Modify Policies on a Single System**. The Policy Assignment page for that system appears.

3. From the product drop-down list, select **McAfee Agent**. The policy categories under McAfee Agent are listed with the system’s assigned policy.

4. If the policy is inherited, select **Break inheritance and assign the policy and settings below**.

5. From the **Assigned policy** drop-down list, select the desired General policy.

   - From this location, you can edit the selected policy, or create a new policy.

6. Select whether to lock policy inheritance to prevent any systems that inherit this policy from having another one assigned in its place.

7. On the **SuperAgent** tab, select **Enable RelayServer** to enable relay capability.

   - Ensure that you configure the **Service Manager port** to **8083**.
   - McAfee recommends that you enable relay capability within the organization’s network.
   - RelayServers cannot connect to the ePolicy Orchestrator servers using proxy settings.

8. Click **Save**.

9. Send an agent wake-up call.

   - After the first ASCI the status of the RelayServer is updated in the McAfee Agent Properties page or the McTray UI on the client system.
   - On a Windows client system, the log file **SvcMgr_<system name>.log** is saved in **C:\ProgramData\McAfee\Common Framework\DB**.

**Collect McAfee Agent statistics**
Run the McAfee Agent Statistics client task on the managed nodes to collect McAfee Agent hierarchy statistics.
For option definitions, click ? in the interface.

**Task**

1. Click **Menu** | **Systems** | **System Tree** | **Systems**, then select a group under System Tree. All systems within this group appear in the details pane.

2. Select a system, then click **Actions** | **Agent** | **Modify Tasks on a Single System**. The client tasks assigned for that system appear.

3. Click **Actions** | **New Client Task Assignment**.

4. From the product list, select **McAfee Agent**, then select **McAfee Agent Statistics** as the **Task Type**.
5 Click Create New task. The new client task page appears.

6 Select the required option, then click Save.

*Once the task is deployed on the client system and the status is reported to ePolicy Orchestrator, the statistics are reset to 0.*

**Disable relay capability**

You can use the General policy to disable the relay capability on the agent.

For option definitions, click ? in the interface.

**Task**

1 Click Menu | Systems | System Tree | Systems, then select a group under System Tree. All the systems within this group appear in the details pane.

2 Select the system on which the relay capability was enabled, then click Actions | Agent | Modify Policies on a Single System. The Policy Assignment page for that system appears.

3 From the product drop-down list, select McAfee Agent. The policy categories under McAfee Agent are listed with the system’s assigned policy.

4 From the Assigned policy drop-down list, select the General policy enforced on the client system.

5 On the SuperAgent tab, deselect Enable RelayServer to disable the relay capability on the client system.

6 Click Save.

7 Send an agent wake-up call.

**Respond to policy events**

You can set up an automatic response in ePolicy Orchestrator that is filtered to see only policy events.

**Task**

For option definitions, click ? in the interface.

1 Click Menu | Automation | Automatic Responses to open the Automatic Responses page.

2 Click Actions | New Response.

3 Enter a Name for the response, and an optional Description.

4 Select ePO Notification Events for the Event group, and Client, Threat, or Server for the Event type.

5 Click Enabled to enable the response and click Next.

6 From the Available Properties, select Event Description.

7 Click ... in the Event Description row and choose one of the following options from the list:

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent failed to collect properties for any point products</td>
<td>This event is generated and forwarded when a property collection failure first occurs. A subsequent success event is not generated. Each failing point product generates a separate event.</td>
</tr>
<tr>
<td>Agent failed to enforce policy for any point products</td>
<td>This event is generated and forwarded when a policy enforcement failure first occurs. A subsequent success event is not generated. Each failing point product generates a separate event.</td>
</tr>
</tbody>
</table>
8 Enter remaining information into the filter as needed, then click Next.

9 Select Aggregation, Grouping, and Throttling options as needed.

10 Choose an action type and enter the desired behavior depending on action type, then click Next.

11 Review the summarized response behavior. If correct, click Save.

An automatic response has now been created that will perform the described action when a policy event occurs.

---

**Run client tasks immediately**

When ePolicy Orchestrator communicates with the McAfee Agent, you can run client tasks immediately using the Run Client Task Now action.

McAfee Agent puts tasks into a queue when they are scheduled to run instead of immediately executing them. While a task can be queued up immediately, it only starts executing if no other tasks are ahead of it in the queue. Tasks created during the Run Client Task Now procedure are run and the task is deleted from the client after it finishes.

The Run Client Task Now is supported only on Windows client systems.

For option definitions, click ? in the interface.

**Task**

1 Click Menu | Systems | System Tree.

2 Select one or more systems on which to run a task.

3 Click Actions | Agent | Run Client Task Now.

4 Select the Product as McAfee Agent and the Task Type.

5 To run an existing task, click the Task Name then click Run Task Now.

6 To define a new task, click Create New Task.
   a Enter the information appropriate to the task you are creating.

If you create a McAfee Agent Product Deployment or Product Update task during this procedure, one of the available options is Run at every policy enforcement. This option has no effect because the task is deleted after it finishes.

The Running Client Task Status page appears, and displays the state of all running tasks. When the tasks are complete, the results can be viewed in the Audit Log and Server Task Log.

---

**Locate inactive agents**

An inactive agent is one that has not communicated with the McAfee ePO server within a user-specified time period.

Some agents might become disabled or be uninstalled by users. In other cases, the system hosting the agent might have been removed from the network. McAfee recommends performing regular weekly searches for systems with these inactive agents.
**Task**

For option definitions, click ? in the interface.

1. Click Menu | Reporting | Queries & Reports.

2. In the Groups list, select the McAfee Agent shared group.

3. Click Run in the Inactive Agents row to run the query.

The default configuration for this query finds systems that have not communicated with the McAfee ePO server in the last month. You can specify hours, days, weeks, quarters or years.

When you find inactive agents, review their activity logs for problems that might interfere with agent-server communication. The query results allow you to take a variety of actions with respect to the systems identified, including ping, delete, wake up, and re-deploy an agent.

---

**Windows system and product properties reported by the agent**

The McAfee Agent reports system properties to ePolicy Orchestrator from its managed systems. The properties reported vary by operating system. Those listed here are properties reported by Windows.

**System properties**

This list shows the system data reported to ePolicy Orchestrator by your nodes' operating systems. Review the details on your system before concluding that system properties are incorrectly reported.

| Agent GUID | Is 64 Bit OS | OS Version |
| CPU Serial Number | Last Sequence Error | Sequence Errors |
| CPU Speed (MHz) | Is Laptop | Server Key |
| CPU Type | Last Communication | Subnet Address |
| Custom Props 1-4 | MAC Address | Subnet Mask |
| Communication Type | Managed State | System Description |
| Default Language | Management Type | System Location |
| Description | Number Of CPUs | System Name |
| DNS Name | Operating System | System Tree Sorting |
| Domain Name | OS Build Number | Tags |
| Excluded Tags | OS OEM Identifier | Time Zone |
| Free Disk Space | OS Platform | To Be Transferred |
| Free Memory | OS Service Pack Version | Total Disk Space |
| Free System Drive Space | OS Type | Total Physical Memory |
| Installed Products | | Used Disk Space |
| IP Address | | User Name |
| IPX Address | | Vdi |
Agent properties

Each McAfee product designates the properties it reports to ePolicy Orchestrator and, of those, which are included in a set of minimal properties. This list shows the kinds of product data that are reported to ePolicy Orchestrator by the McAfee software installed on your system. If you find errors in the reported values, review the details of your products before concluding that they are incorrectly reported.

- Agent GUID
- Agent-Server Secure Communication Key Hash
- Agent-to-Server Communication Interval
- Agent Wake-Up Call
- Agent Wake-Up Communication Port
- Cluster Node
- Cluster Service State
- Cluster Name
- Cluster Host
- Cluster Member Nodes
- Cluster Quorum Resource Path
- Cluster IP Address
- DAT Version
- Engine Version
- Force Automatic Reboot After
- Hotfix/Patch Version
- Show McAfee Tray Icon
- RelayServer
- SuperAgent Functionality
- SuperAgent Repository
- SuperAgent Repository Directory
- SuperAgent Wake-Up Communication Port

Queries provided by the McAfee Agent

McAfee Agent adds a number of standard queries to your ePolicy Orchestrator environment. The following queries are installed into the McAfee Agent shared group.

<table>
<thead>
<tr>
<th>Query</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Communication Summary</td>
<td>A pie chart of managed systems indicating whether the agents have communicated with the McAfee ePO server within the past day.</td>
</tr>
<tr>
<td>Agent Handler Status</td>
<td>A pie chart displaying Agent Handler communication status within the last hour.</td>
</tr>
<tr>
<td>Agent Statistics information</td>
<td>A bar chart displaying the following agent statistics:</td>
</tr>
<tr>
<td></td>
<td>• Number of failed connections to the relay servers</td>
</tr>
<tr>
<td></td>
<td>• Number of attempts made to connect to the relay server after the maximum allowed connections</td>
</tr>
<tr>
<td></td>
<td>• Network bandwidth saved by use of SuperAgent hierarchy</td>
</tr>
<tr>
<td>Agent Versions Summary</td>
<td>A pie chart of installed agents by version number on managed systems.</td>
</tr>
</tbody>
</table>
Table 10-1  Queries provided by McAfee Agent (continued)

<table>
<thead>
<tr>
<th>Query</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive Agents</td>
<td>A table listing all managed systems whose agents have not communicated within the last month.</td>
</tr>
<tr>
<td>Managed nodes having point product policy enforcement failures</td>
<td>A single group bar chart showing the maximum managed nodes (specified in the Query Builder wizard) having at least one policy enforcement failure.</td>
</tr>
<tr>
<td>Managed nodes having point product property collection failures</td>
<td>A single group bar chart showing the maximum managed nodes (specified in the Query Builder wizard) having at least one property collection failure.</td>
</tr>
<tr>
<td>Repositories and Percentage Utilization</td>
<td>A pie chart displaying individual repository utilization as a percentage of all repositories.</td>
</tr>
<tr>
<td>Repository Usage Based on DAT and Engine Pulling</td>
<td>A stacked bar chart displaying DAT and Engine pulling per repository.</td>
</tr>
<tr>
<td>Systems per Agent Handler</td>
<td>A pie chart displaying the number of managed systems per Agent Handler.</td>
</tr>
</tbody>
</table>

Allow agent deployment credentials to be cached

Administrators must provide credentials to successfully deploy agents from your ePolicy Orchestrator server to systems in your network. You can choose whether to allow agent deployment credentials to be cached for each user.

Once a user’s credentials are cached, that user can deploy agents without having to provide them again. Credentials are cached per user, so a user that has not previously provided credentials cannot deploy agents without providing their own credentials first.

Task
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Agent Deployment Credentials from the Setting Categories, then click Edit.
2. Select the checkbox to allow agent deployment credentials to be cached.

Change agent communication ports

You can change some of the ports used for agent communication on your ePolicy Orchestrator server. You can modify the settings for these agent communication ports:

- Agent-to-server communication secure port
- Agent wake-up communication port
- Agent broadcast communication port
Task
For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Ports from the Setting Categories, then click Edit.

2. Select whether to enable port 443 as the secure port for agent-server communications, type the ports to be used for agent wake-up calls and agent broadcasts, then click Save.

View McAfee Agent and product properties
A common troubleshooting task is to verify that the policy changes you made match the properties retrieved from a system.
For option definitions, click ? in the interface.

Task
1. Click Menu | Systems | System Tree.

2. On the Systems tab, click the row corresponding to the system you want to examine.

Information about the system's properties, installed products, and agent appears. The top of the System Information page contains Summary, Properties, and Threat Events windows. It also displays System Properties, Products, Threat Events, McAfee Agent, and Related Items tabs.

Security keys
Security keys are used to verify and authenticate communications and content within your ePolicy Orchestrator managed environment.

Contents
- Security keys and how they work
- Master repository key pair
- Other repository public keys
- Manage repository keys
- Agent-server secure communication (ASSC) keys
- Backup and restore keys

Security keys and how they work
The ePolicy Orchestrator server relies on three security key pairs.

The three security pairs are used to:
- Authenticate agent-server communication.
- Verify the contents of local repositories.
- Verify the contents of remote repositories.

Each pair's secret key signs messages or packages at their source, while the pair's public key verifies the messages or packages at their target.
Agent-server secure communication (ASSC) keys

- The first time the agent communicates with the server, it sends its public key to the server.
- From then on, the server uses the agent public key to verify messages signed with the agent’s secret key.
- The server uses its own secret key to sign its message to the agent.
- The agent uses the server's public key to verify the server's message.
- You can have multiple secure communication key pairs, but only one can be designated as the master key.
- When the client agent key updater task runs (McAfee ePO Agent Key Updater), agents using different public keys receive the current public key.
- When you upgrade, existing keys are migrated to your McAfee ePO server.

Local master repository key pairs

- The repository secret key signs the package before it is checked in to the repository.
- The repository public key verifies repository package contents.
- The agent retrieves available new content each time the client update task runs.
- This key pair is unique to each server.
- By exporting and importing keys among servers, you can use the same key pair in a multi-server environment.

Other repository key pairs

- The secret key of a trusted source signs its content when posting that content to its remote repository. Trusted sources include the McAfee download site and the McAfee Security Innovation Alliance (SIA) repository.
  
  ! If this key is deleted, you cannot perform a pull, even if you import a key from another server. Before you overwrite or delete this key, make sure to back it up in a secure location.
  
- The McAfee Agent public key verifies content that is retrieved from the remote repository.

Master repository key pair

The master repository private key signs all unsigned content in the master repository. This key is a feature of agents 4.0 and later.

Agents 4.0 and later use the public key to verify the repository content that originates from the master repository on this McAfee ePO server. If the content is unsigned, or signed with an unknown repository private key, the downloaded content is considered invalid and deleted.

This key pair is unique to each server installation. However, by exporting and importing keys, you can use the same key pair in a multi-server environment. Doing so ensures that agents can always connect to one of your master repositories, even when another repository is down.

Other repository public keys

Keys other than the master key pair are the public keys that agents use to verify content from other master repositories in your environment or from McAfee source sites. Each agent reporting to this server uses the keys in the Other repository public keys list to verify content that originates from other McAfee ePO servers in your organization, or from McAfee-owned sources.
If an agent downloads content that originated from a source where the agent does not have the appropriate public key, the agent discards the content.

These keys are a new feature, and only agents 4.0 and later are able to use the new protocols.

**Manage repository keys**
You can manage repository keys using these tasks.

**Tasks**
- *Use one master repository key pair for all servers on page 152*
  You can ensure that all McAfee ePO servers and agents use the same master repository key pair in a multi-server environment using Server Settings.
- *Use master repository keys in multi-server environments on page 152*
  Make sure that agents can use content originating from any McAfee ePO server in your environment using Server Settings.

**Use one master repository key pair for all servers**
You can ensure that all McAfee ePO servers and agents use the same master repository key pair in a multi-server environment using Server Settings.
This consists of first exporting the key pair you want all servers to use, then importing the key pair into all other servers in your environment.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Server Settings**, select **Security Keys** from the Setting Categories list, then click **Edit**.
   The Edit Security Keys page appears.
2. Next to **Local master repository key pair**, click **Export Key Pair**.
3. Click **OK**. The File Download dialog box appears.
4. Click **Save**, browse to a location that is accessible by the other servers, where you want to save the zip file containing the secure-communication key files, then click **Save**.
5. Next to **Import and back up keys**, click **Import**.
6. Browse to the zip file containing the exported master repository key files, then click **Next**.
7. Verify that these are the keys you want to import, then click **Save**.

The imported master repository key pair replaces the existing key pair on this server. Agents begin using the new key pair after the next agent update task runs. Once the master repository key pair is changed, an ASSC must be performed before the agent can use the new key.

**Use master repository keys in multi-server environments**
Make sure that agents can use content originating from any McAfee ePO server in your environment using **Server Settings**.
The server signs all unsigned content that is checked in to the repository with the master repository private key. Agents use repository public keys to validate content that is retrieved from repositories in your organization or from McAfee source sites.

The master repository key pair is unique for each installation of ePolicy Orchestrator. If you use multiple servers, each uses a different key. If your agents can download content that originates from different master repositories, you must make sure that agents recognize the content as valid.
You can do this in two ways:

- Use the same master repository key pair for all servers and agents.
- Make sure agents are configured to recognize any repository public key that is used in your environment.

This task exports the key pair from one McAfee ePO server to a target McAfee ePO server, then, at the target McAfee ePO server, imports and overwrites the existing key pair.

For option definitions, click ? in the interface.

**Task**

1. On the McAfee ePO server with the master repository key pair, click **Menu | Configuration | Server Settings**, select **Security Keys** from the **Setting Categories** list, then click **Edit**.
2. Next to **Local master repository key pair**, click **Export Key Pair**, then click **OK**.
3. In the **File Download** dialog box, click **Save**.
4. Browse to a location on the target McAfee ePO server to save the zip file. Change the name of the file if needed, then click **Save**.
5. On the target McAfee ePO server where you want to load the master repository key pair, click **Menu | Configuration | Server Settings**, select **Security Keys** from the **Setting Categories** list, then click **Edit**.
6. On the **Edit Security Keys** page:
   a. Next to **Import and back up keys**, click **Import**.
   b. Next to **Select file**, browse to and select the master key pair file you saved, then click **Next**.
   c. If the summary information appears correct, click **Save**. The new master key pair appears in the list next to **Agent-server secure communication keys**.
7. From the list, select the file you imported in the previous steps, then click **Make Master**. This changes the existing master key pair to the new key pair you just imported.
8. Click **Save** to complete the process.

**Agent-server secure communication (ASSC) keys**

Agents use ASSC keys to communicate securely with the server.

You can make any ASSC key pair the master, which is the key pair currently assigned to all deployed agents. Existing agents that use other keys in the **Agent-server secure communication keys** list do not change to the new master key unless there is a client agent key updater task scheduled and run.

- Make sure to wait until all agents have updated to the new master before deleting older keys.
- Windows agents older than version 4.0 are not supported.

**Work with ASSC keys**

To manage and use ASSC keys in your environment use these tasks.
Tasks

- **Manage ASSC keys on page 154**
  Generate, export, import, or delete agent-server secure communication (ASSC) keys from the Server Settings page.

- **View systems that use an ASSC key pair on page 156**
  You can view the systems whose agents use a specific agent-server secure communication key pair in the Agent-server secure communication keys list.

- **Use the same ASSC key pair for all servers and agents on page 156**
  Verify that all McAfee ePO servers and agents use the same agent-server secure communication (ASSC) key pair.

- **Use a different ASSC key pair for each McAfee ePO server on page 157**
  You can use a different ASSC key pair for each McAfee ePO server to ensure that all agents can communicate with the required McAfee ePO servers in an environment where each server must have a unique agent-server secure communication key pair.

Manage ASSC keys

Generate, export, import, or delete agent-server secure communication (ASSC) keys from the Server Settings page.

For option definitions, click ? in the interface.

Task


2. Select one of these actions.
<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate and use new ASSC key pairs</td>
<td>Generate new ASSC key pairs.</td>
</tr>
<tr>
<td>1 Next to the Agent-server secure communication keys list, click New Key. In the dialog box, type the name of the security key.</td>
<td></td>
</tr>
<tr>
<td>2 If you want existing agents to use the new key, select the key in the list, then click Make Master. Agents begin using the new key after the next McAfee Agent update task is complete. Make sure that there is an Agent Key Updater package for each version of the McAfee Agent that the McAfee ePO server manages. For example, if the McAfee ePO server manages 4.6 agents, make sure that the 4.6 Agent Key Updater package has been checked in to the master repository.</td>
<td></td>
</tr>
<tr>
<td>In large installations, only generate and use new master key pairs when you have specific reason to do so. We recommend performing this procedure in phases so you can more closely monitor progress.</td>
<td></td>
</tr>
<tr>
<td>3 After all agents have stopped using the old key, delete it. In the list of keys, the number of agents currently using that key is displayed to the right of every key.</td>
<td></td>
</tr>
<tr>
<td>4 Back up all keys.</td>
<td></td>
</tr>
<tr>
<td>Export ASSC keys</td>
<td>Export ASSC keys from one McAfee ePO server to a different McAfee ePO server, to allow agents to access the new McAfee ePO server.</td>
</tr>
<tr>
<td>1 In the Agent-server secure communication keys list, select a key, then click Export.</td>
<td></td>
</tr>
<tr>
<td>2 Click OK.</td>
<td>Your browser prompts you to for action to download the sr&lt;ServerName&gt;.zip file to the specified location.</td>
</tr>
<tr>
<td>If you specified a default location for all browser downloads, this file might be automatically saved to that location.</td>
<td></td>
</tr>
<tr>
<td>Import ASSC keys</td>
<td>Import ASSC keys that were exported from a different McAfee ePO server. This procedure allows agents from that server to access this McAfee ePO server.</td>
</tr>
<tr>
<td>1 Click Import.</td>
<td></td>
</tr>
<tr>
<td>2 Browse to and select the key from the location where you saved it (by default, on the desktop), then click Open.</td>
<td></td>
</tr>
<tr>
<td>3 Click Next and review the information on the Import Keys page.</td>
<td></td>
</tr>
<tr>
<td>4 Click Save.</td>
<td></td>
</tr>
</tbody>
</table>
### Action | Steps
--- | ---
Designate an ASSC key pair as the master | Change which key pair, listed in the Agent-server secure communication keys list, is specified as the master. Specify a master key pair after importing or generating a new key pair.
   1. From the Agent-server secure communication keys list, select a key, then click **Make Master**.
   2. Create an update task for the agents to run immediately, so that agents update after the next agent-server communication.
   3. Back up all keys.

Delete ASSC keys | Do not delete any keys that are currently in use by any agents. If you do, those agents cannot communicate with the McAfee ePO server.
   1. From the Agent-server secure communication keys list, select the key you want to remove, then click **Delete**.
   2. Click **OK** to delete the key pair from this server.

### View systems that use an ASSC key pair
You can view the systems whose agents use a specific agent-server secure communication key pair in the Agent-server secure communication keys list.

After making a specific key pair the master, you might want to view the systems that are still using the previous key pair. Do not delete a key pair until you know that no agents are still using it.

For option definitions, click ? in the interface.

#### Task
1. Click **Menu** | **Configuration** | **Server Settings**, select **Security Keys** from the Setting Categories list, then click **Edit**.
   The Edit Security Keys page appears.
2. In the Agent-server secure communication keys list, select a key, then click **View Agents**. The **Systems using this key** page appears.

This page lists all systems whose agents are using the selected key.

### Use the same ASSC key pair for all servers and agents
Verify that all McAfee ePO servers and agents use the same agent-server secure communication (ASSC) key pair.

If you have a large number of managed systems in your environment, McAfee recommends performing this process in phases so you can monitor agent updates.

#### Task
1. Create an agent update task.
2. Export the keys chosen from the selected McAfee ePO server.
3. Import the exported keys to all other servers.
4 Designate the imported key as the master on all servers.
5 Perform two agent wake-up calls.
6 When all agents are using the new keys, delete any unused keys.
7 Back up all keys.

**Use a different ASSC key pair for each McAfee ePO server**
You can use a different ASSC key pair for each McAfee ePO server to ensure that all agents can communicate with the required McAfee ePO servers in an environment where each server must have a unique agent-server secure communication key pair.

Agents can communicate with only one server at a time. The McAfee ePO server can have multiple keys to communicate with different agents, but the opposite is not true. Agents cannot have multiple keys to communicate with multiple McAfee ePO servers.

For option definitions, click ? in the interface.

**Task**
1 From each McAfee ePO server in your environment, export the master agent-server secure communication key pair to a temporary location.
2 Import each of these key pairs into every McAfee ePO server.

**Backup and restore keys**
Periodically back up all security keys, and always create a backup before changing the key management settings.

Store the backup in a secure network location, so that the keys can be restored easily in the unexpected event any are lost from the McAfee ePO server.

**Task**
For option definitions, click ? in the interface.

1 Click Menu | Configuration | Server Settings, select Security Keys from the Setting Categories list, then click Edit.

   The Edit Security Keys page appears.

2 Select one of these actions.
### Action | Steps
--- | ---
Back up all security keys. | 1 Click **Back Up All** near the bottom of the page.  
The Backup Keystore dialog box appears.  
2 You can optionally enter a password to encrypt the Keystore .zip file or click **OK** to save the files as unencrypted text.  
3 From the File Download dialog box, click **Save** to create a .zip file of all security keys.  
The Save As dialog box appears.  
4 Browse to a secure network location to store the .zip file, then click **Save**.

Restore security keys. | 1 Click **Restore All** near the bottom of the page.  
The Restore Security Keys page appears.  
2 Browse to the .zip file containing the security keys, select it, and click **Next**.  
The Restore Security Keys wizard opens to the Summary page.  
3 Browse to the keys you want to replace your existing key with, then click **Next**.  
4 Click **Restore**.  
The Edit Security Keys page reappears.  
5 Browse to a secure network location to store the .zip file, then click **Save**.

Restore security keys from a backup file. | 1 Click **Restore All** near the bottom of the page.  
The Restore Security Keys page appears.  
2 Browse to the .zip file containing the security keys, select it, and click **Next**.  
The Restore Security Keys wizard opens to the Summary page.  
3 Browse to and select the backup .zip file, then click **Next**.  
4 Click **Restore All** at the bottom of the page.  
The Restore Security Keys wizard opens.  
5 Browse to and select the backup .zip file, then click **Next**.  
6 Verify that the keys in this file are the ones you want to overwrite your existing keys, then click **Restore All**.
Use the Software Manager to review and acquire McAfee software and software components.

Contents

- What's in the Software Manager
- Check in, update, and remove software using the Software Manager
- Check product compatibility

What's in the Software Manager
The Software Manager eliminates the need to access the McAfee Product Download website to obtain new McAfee software and software updates. You can use the Software Manager to download:

- Licensed software
- Evaluation software
- Software updates
- Product documentation

DATs and Engines are not available from the Software Manager.

Licensed software
Licensed software is any software your organization has purchased from McAfee. When viewing the Software Manager in the ePolicy Orchestrator console, any software licensed to your company not already installed on your server is listed in the Software Not Checked In product category. The number displayed next to each subcategory in the Product Categories list indicates how many products are available.

Evaluation software
Evaluation software is software for which your organization does not currently possess a license. You can install evaluation software on your server, but functionality might be restricted until you acquire a product license.

Software updates
When a new update for the software you're using is released, you can use the Software Manager to check in new packages and extensions. Available software updates are listed in the Updates Available category.
Software Manager
Check in, update, and remove software using the Software Manager

Product documentation

New and updated product documentation can be obtained from the Software Manager. Help extensions can be installed automatically. PDF and HTML documentation such as Product Guides and Release Notes can also be downloaded from the Software Manager.

About software component dependencies

Many of the software products you can install for use with your McAfee ePO server have predefined dependencies on other components. Dependencies for product extensions are installed automatically. For all other product components, you must review the dependencies list in the component details page, and install them first.

Check in, update, and remove software using the Software Manager

From the Software Manager, you can check in, update, and remove McAfee managed product components from your server.

Both licensed and evaluation software can be accessed in the Software Manager.

Software availability, and whether it is in the Licensed or Evaluation category, depends on your License key. For more information, contact your Administrator.

Task

For option definitions, click ? in the interface.

1 Click Menu | Software | Software Manager.

2 In the Software Manager page Product Categories list, select one of the following categories, or use the search box to find your software:

   - Updates Available — Lists any available updates to licensed software components already installed or checked into this ePolicy Orchestrator server.
   - Checked in Software — Displays all software (both Licensed and Evaluation) installed or checked into this server.
   - Software Not Checked in — Displays any software that is available, but not installed on this server.
   - Software (by Label) — Displays software by function as described by McAfee product suites.

3 When you’ve located the correct software, click:

   - Download to download product documentation to a location on your network.
   - Check in to check in a product extension or package on this server.
   - Update to update a package or extension that is currently installed or checked into this server.
   - Remove to uninstall a package or extension that is currently installed or checked into this server.

4 In the Check In Software Summary page, review and accept the product details and End User License Agreement (EULA), then click OK to complete the operation.
Check product compatibility

You can configure a Product Compatibility Check to automatically download a Product Compatibility List from McAfee. This list identifies products that are no longer compatible in your ePolicy Orchestrator environment.

ePolicy Orchestrator performs this check any time the installation and startup of an extension could leave your server in an undesirable state. This check occurs in these situations:

- During an upgrade from a previous version of ePolicy Orchestrator to 5.0 or later.
- When an extension is installed from the Extensions menu.
- Before a new extension is retrieved from the Software Manager.
- When a new compatibility list is received from McAfee.
- When the Data Migration Tool runs. See McAfee ePolicy Orchestrator 5.0.0 Software Installation Guide for details.

Product Compatibility Check

The Product Compatibility Check uses an XML file, Product Compatibility List, to determine which product extensions are known to be not compatible with a version of ePolicy Orchestrator.

An initial list is included in the ePolicy Orchestrator software package downloaded from the McAfee website. When you run the ePolicy Orchestrator Setup during an installation or upgrade, ePolicy Orchestrator automatically retrieves the most current list of compatible extensions from a trusted McAfee source over the Internet. If the Internet source is unavailable or if the list cannot be verified, ePolicy Orchestrator uses the latest version it has available.

The ePolicy Orchestrator server updates the Product Compatibility List, a small file, in the background once per day.

Remediation

When you view the list of incompatible extensions through the installer or ePolicy Orchestrator Upgrade Compatibility Utility, you are notified if a known replacement extension is available.

In some cases during an upgrade:

- An extension blocks the upgrade and must be removed or replaced before the upgrade can continue.
- An extension is disabled, but you need to update the extension after the ePolicy Orchestrator upgrade completes.

See Blocked or disabled extensions for more details.

Disabling automatic updates

You might want to disable the automatic updates of the Product Compatibility List to prevent a new list from being downloaded.

The download occurs as part of a background task, or when the Software Manager content is refreshed. This setting is particularly helpful when your McAfee ePO server does not have inbound Internet access. See Change Product Compatibility List download for details.

Re-enabling the Product Compatibility List download setting also re-enables Software Manager automatic updates of the Product Compatibility List.
Using a manually downloaded Product Compatibility List

You might want to use a manually downloaded Product Compatibility List, for example if your ePolicy Orchestrator server does not have Internet access.

You can manually download the list:

- When you install ePolicy Orchestrator. See Blocked or disabled extensions for details.
- When using Server Settings | Product Compatibility List to manually upload a Product Compatibility List. This list takes effect immediately after upload.

![Enable automatic updating of the list to prevent overwriting the manually downloaded Product Compatibility List. See Change Product Compatibility List download for details.]

- Click ProductCompatibilityList.xml to manually download the list.

Blocked or disabled extensions

If an extension is blocked in the Product Compatibility List it prevents the ePolicy Orchestrator software upgrade. If an extension is disabled it doesn't block the upgrade, but the extension isn't initialized after the upgrade until a known replacement extension is installed.

Command line options for installing the Product Compatibility List

You can use these command line options with the setup.exe command to configure Product Compatibility List downloads.

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>setup.exe DISABLEPRODCOMPATUPDATE=1</td>
<td>Disables automatic downloading of the Product Compatibility List from the McAfee website.</td>
</tr>
<tr>
<td>setup.exe PRODCOMPATXML=&lt;full_filename_including_path&gt;</td>
<td>Specifies an alternate Product Compatibility List file.</td>
</tr>
</tbody>
</table>

Both command line options can be used together in a command string.

Reconfigure Product Compatibility List download

You can download the Product Compatibility List from the Internet, or use a manually downloaded list to identifying products that are no longer compatible in your ePolicy Orchestrator environment.

Before you begin

Any manually downloaded Product Compatibility List, must be a valid XML file provided by McAfee.

![If you make any changes to the Product Compatibility List XML file, the file is invalidated.]

Task

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Product Compatibility List from the Setting Categories, then click Edit.

A list of disabled incompatible extensions appears in a table on the opening page.
2 Click **Disabled** to stop automatic and regular downloads of the Product Compatibility List from McAfee.

3 Click **Browse** and navigate to the **Upload Product Compatibility List**, then click **Save**.

Now you have disabled automatic downloading of the Product Compatibility List, your McAfee ePO server uses the same list until you upload a new list, or connect your server to the Internet and enable automatic downloading.
12 Product Deployment

ePolicy Orchestrator simplifies the process of deploying security products to the managed systems in your network by providing a user interface to configure and schedule deployments. There are two processes you can follow to deploy products using ePolicy Orchestrator:

- **Product Deployment** projects, which streamline the deployment process and provide more functionality.
- Individually created and managed client task objects and tasks.

### Contents

- Choosing a product deployment method
- Benefits of product deployment projects
- The product deployment page explained
- Viewing Product Deployment audit logs
- Deploy products using a product deployment project
- Monitor and edit deployment projects
- Deploy new McAfee Agent example

### Choosing a product deployment method

Deciding which product deployment method to use depends on what you have already configured. **Product Deployment** projects offer a simplified workflow and increased functionality for deploying products to your ePolicy Orchestrator managed systems. However, you can't use a **Product Deployment** project to act on or manage client task objects and tasks created in a version of the software before 5.0.

If you want to maintain, and continue to use client tasks and objects created outside of a **Product Deployment** project, use the client task object library and assignment interfaces. You can maintain these existing tasks and object while using the **Product Deployment** project interface to create new deployments.

### Benefits of product deployment projects

Product deployment projects simplify the process of deploying security products to your managed system by reducing the time and overhead needed to schedule and maintain deployments throughout your network.

Product deployment projects streamline the deployment process by consolidating many of the steps needed to create and manage product deployment tasks individually. They also add the ability to:
• **Run a deployment continuously** — This allows you to configure your deployment project so that when new systems matching your criteria are added, products are deployed automatically.

• **Stop a running deployment** — If, for some reason, you need to stop a deployment once it’s started, you can. Then you can resume that deployment when you’re ready.

• **Uninstall a previously deployed product** — If a deployment project has been completed, and you want to uninstall the associated product from the systems assigned to your project, select Uninstall from the Action list.

The following table compares the two process for deploying products — individual client task objects and product deployment projects.

### Table 12-1  Product deployment methods compared

<table>
<thead>
<tr>
<th>Client task objects</th>
<th>Function comparison</th>
<th>Product deployment project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and description</td>
<td>Same</td>
<td>Name and description</td>
</tr>
<tr>
<td>Collection of product software to deploy</td>
<td>Same</td>
<td>Collection of product software to deploy</td>
</tr>
</tbody>
</table>
| Use tags to select target systems          | Enhanced in Product Deployment project | Select when the deployment occurs:  
  • **Continuous** — Continuous deployments use System Tree groups or tags which allow you to move systems to those groups or assign systems tags and cause the deployment to apply to those systems.  
  • **Fixed** — Fixed deployments use a fixed, or defined, set of systems. System selection is done using your System Tree or Managed Systems Query output tables. |
| Deployment schedule                        | Similar             | Simplified deployment schedule allows you to either run the deployment immediately or run it once at a scheduled time. |
| Not available                              | New in Product Deployment project | Monitor the current deployment status, for example deployments scheduled but not started, in progress, stopped, paused, or completed. |
| Not available                              | New in Product Deployment project | View a historical snapshot of data about the number of systems receiving the deployment.  
  [i](#) For fixed deployments only. |
| Not available                              | New in Product Deployment project | View the status of individual system deployments, for example systems installed, pending, and failed. |
| Not available                              | New in Product Deployment project | Modify an existing deployment assignment using:  
  • Create New for modifying an existing deployment  
  • Edit  
  • Duplicate  
  • Delete  
  • Stop and Pause Deployment  
  • Continue and Resume Deployment  
  • Uninstall |
The product deployment page explained

The product deployment page is a single location where you can create, monitor, and manage your product deployment projects.

The page is separated into the two main areas (areas 1 and 2 in the image below), with area 2 further separated into five smaller areas.

Figure 12-1  Product Deployment page explained

These main areas are:

1 Deployment summary — Lists the product deployments and allows you to filter them by type and status and quickly view their progress. If you click on a deployment, details for the deployment are displayed in the Deployment details area.

   An exclamation point icon indicates either an uninstall of the deployment is in progress or the package the deployment uses has been moved or deleted.

2 Deployment details — Lists the details of the selected deployment and includes the following areas:
2a Status monitor — The progress and status display varies depending on the type of deployment and its status:

- Continuous deployments display a calendar if the deployment is pending, or a bar chart during the deployment.
- Fixed deployments display a calendar if the deployment is pending, or either a bar chart if Current is selected, or a histogram if Duration is selected.

2b Details — The details display allows you to view deployment configuration details, status, and if needed, click View Task Details to open the Edit Deployment page.

2c System name — Displays a filterable list of target systems receiving the deployment. The systems displayed varies depending on the deployment type and whether the systems were selected individually, as tags, as System Tree groups, or query output tables.

Clicking System Actions displays the filtered list of systems in a dialog box with more detail and allows you to perform actions on the systems, such as update and wake-up.

2d Status — Displays a three-section bar indicating the progress of the deployment and its status.

2e Tags — Displays tags associated with the row of systems.

---

**Viewing Product Deployment audit logs**

Audit logs from your deployment projects contain records of all product deployments made from the console using the Product Deployment feature.

These audit log entries are displayed in a sortable table within the Deployment details area of the Product Deployment page, as well as on the Audit Log page, which contains log entries from all auditable user actions. You can use these logs to track, create, edit, duplicate, delete, and uninstall product deployments. Click a log entry to display entry details.

**Deploy products using a product deployment project**

Deploying your security products to managed systems using a deployment project allows you to easily select products to deploy, the target systems, and schedule the deployment.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Software | Product Deployment**.

2. Click **New Deployment** to open the New Deployment page and to start a new project.

3. Type a **Name** and **Description** for this deployment. This name appears on the Deployment page after the deployment is saved.

4. Choose the type of deployment:

   - **Continuous** — Uses your System Tree groups or tags to configure the systems receiving the deployment. This allows these systems to change over time as they are added or removed from the groups or tags.

   - **Fixed** — Uses a fixed, or defined, set of systems to receive the deployment. System selection is done using your System Tree or Managed Systems Queries table output.
5 To specify which software to deploy, select a product from the Package list. Click + and - to add or remove packages.

Your software must be checked into the Master Repository before it can be deployed. The Language and Branch fields are populated automatically, as determined by the location and language specified in the Master Repository.

6 In the Command line text field, specify any command-line installation options. See the product documentation for software you’re deploying for information on command-line options.

7 In the Select the systems section, click Select Systems to open the System Selection dialog box.

The System Selection dialog box is a filter that allows you to select groups in your System Tree, Tags, or a subset of grouped and/or tagged systems. The selections you make in each tab within this dialog box are concatenated to filter the complete set of target systems for your deployment.

For example, if your System Tree contains "Group A," which includes both Servers and Workstations, you can target the entire group, just the Servers or Workstations (if they are tagged accordingly), or a subset of either system type in group A.

Fixed deployments have a limit of 500 systems to receive the deployment.

If needed, configure the following:
- Run at every policy enforcement (Windows only)
- Allow end users to postpone this deployment (Windows only)
- Maximum number of postponements allowed
- Option to postpone expires after
- Display this text

8 Pick a start time or schedule for your deployment:
- Run Immediately — Starts the deployment task during the next ASCI.
- Once — Opens the scheduler so you can configure the start date, time, and randomization.

9 When you’re finished, click Save at the top of the page. The Product Deployment page opens with your new project added to the list of deployments.

After you create a deployment project, a client task is automatically created with the deployment settings.

**Monitor and edit deployment projects**

Use the Product Deployment page to create, track, and change deployment projects.

In the task below, the first few steps describe using the interface to select and monitor an existing deployment project, while the last steps describe selecting Actions to modify that deployment project.
**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Software | Product Deployment**. The Product Deployment page appears.

2. Filter the list of deployment projects using either, or both, of the following:
   - **Type** — Filters the deployments that appear by All, Continuous, or Fixed.
   - **Status** — Filters the deployments that appear by All, Finished, In Progress, Pending, Running, or Stopped.

3. Click a deployment in the list on the left-hand side of the page to display its details on the right-hand side of the page.

4. Use the progress section of the details display to view a:
   - Calendar displaying the start date for pending continuous and fixed deployments.
   - Histogram displaying systems and the time to completion for fixed deployments.
   - Status bar displaying system deployment and uninstallation progress.

5. Click **Actions** and one of the following to modify a deployment:
   - **Edit**
   - **Delete**
   - **Duplicate**
   - **Resume**
   - **Stop**
   - **Uninstall**
   - **Mark Finished**

6. In the details section, click **View Task Details** to open the **Edit Deployment** page, where you can view and modify the settings for the deployment.

7. In the Systems table, click one of the following in the Filter list to change which systems appear:
   - During Uninstall the filters include — All, Packages Removed, Pending, and Failed
   - During all other actions the filters include — All, Install Successful, Pending, and Failed

8. In the Systems table, you can:
   - Check the status of each row of target systems in the Status column. A three-section status bar indicates the progress of the deployment.
   - Check the tags associated with the target systems in the Tags column.
   - Click **System Actions** to display the list of systems in a new page where you can perform system specific actions on the systems you select.
Deploy new McAfee Agent example

After your initial ePolicy Orchestrator installation and McAfee Agent deployment, any additional McAfee Agent deployments must be created using either a Product Deployment project or manually using a Client Task object.

Before you begin

Before starting this example task to deploy the McAfee Agent for Linux, you must have already added the Linux platforms to the ePolicy Orchestrator System Tree.

Deploying the agent is the first step when you originally install and begin using ePolicy Orchestrator and the initial McAfee Agent you deploy is silently updated automatically whenever a new version is available. But, if your managed network systems include more than one type platform operating system, those systems need a different McAfee Agent. For example, since most ePolicy Orchestrator managed network systems use Windows operating system platforms, if your network includes some Linux platforms, they need the McAfee Agent for Linux installed.

See Product Deployment and Help for details about the feature, user interface, and options.

This task describes:

- Creating the McAfee Agent for Linux Product Deployment project.
- Confirming the project deployed the agent
- Confirming the Linux platforms are under ePolicy Orchestrator management

Task

1. To create the new Product Deployment project, click Menu | Software | Product Deployment | New Deployment.

2. In the New Deployment page, configure these settings.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name and Description</td>
<td>Type a Name and Description for this deployment. For example, type Linux McAfee Agent deployment.</td>
</tr>
<tr>
<td></td>
<td>This name appears on the Deployment page after the deployment is saved.</td>
</tr>
<tr>
<td>Type</td>
<td>From the list, select Continuous.</td>
</tr>
<tr>
<td></td>
<td>This type uses your System Tree groups or tags to configure the systems receiving the deployment. This allows these systems to change over time as they are added or removed from the groups or tags.</td>
</tr>
<tr>
<td>Package</td>
<td>From the list, select McAfee Agent for Linux.</td>
</tr>
<tr>
<td>Language and Branch</td>
<td>If needed, select the Language and Branch, if not using the defaults.</td>
</tr>
</tbody>
</table>
| Command line            | In the text field, specify any command-line installation options. See the McAfee Agent Product Guide for command-line option details.
### Option | Description
--- | ---
Select the systems | Click **Select Systems** to open the **System Selection** dialog box. The **System Selection** dialog box is a filter that allows you to select groups in your System Tree, Tags, or a subset of grouped or tagged systems. The selections you make in each tab within this dialog box are concatenated to filter the complete set of target systems for your deployment.

For example, if your System Tree contains "Linux Systems," which includes both Servers and Workstations, you can target the entire group, just the Servers or Workstations (if they are tagged accordingly), or a subset of either system type of Linux systems.

If needed, configure the following:
- Run at every policy enforcement (Windows only)
- Allow end users to postpone this deployment (Windows only)
- Maximum number of postponements allowed
- Option to postpone expires after
- Display this text

Select a start time | Pick a start time or schedule for your deployment:
- **Run Immediately** — Starts the deployment task during the next ASCI.
- **Once** — Opens the scheduler so you can configure the start date, time, and randomization.

Save | When you’re finished, click **Save** at the top of the page. The **Product Deployment** page opens with your new project added to the list of deployments.

After you create a deployment project, a client task is automatically created with the deployment settings.

3 In the **Product Deployment** page, confirm the McAfee Agent for Linux **Product Deployment** project is working correctly by checking this information.

### Option | Description
--- | ---
Deployment summary | Click **Linux McAfee Agent deployment** Product Deployment project you created in the previous step and the details display in the right side of the page.

Since this is a continuous deployment, the infinity symbol ✨ appears under **In Progress**.

Deployment details | Allows you to:
- Click **Actions** to modify the selected deployment.
- View **Progress, Status, and Details** of the selected deployment.
- View the **Systems, System Actions, Status, and Tags** associated with the selected deployment.

After you complete this example process the Linux platforms you added to your **System Tree**, have the McAfee Agent for Linux installed and should now be managed by ePolicy Orchestrator.
Policies make sure that a product’s features are configured correctly on your managed systems. Managing products from a single location is a central feature of ePolicy Orchestrator. This is accomplished through application and enforcement of product policies. Policies ensure a product’s features are configured correctly, while client tasks are the scheduled actions that run on the managed systems hosting any client-side software.

Contents
- Policies and policy enforcement
- Policy application
- Create and maintain policies
- Configuring policies for the first time
- Manage policies
- Policy assignment rules
- Create policy management queries
- View policy information
- Share policies among McAfee ePO servers
- Distribute your policy to multiple McAfee ePO servers

Policies and policy enforcement

A policy is a collection of settings that you create and configure, then enforce. Policies make sure that the managed security software products are configured and perform accordingly.

Some policy settings are the same as the settings you configure in the interface of the product installed on the managed system. Other policy settings are the primary interface for configuring the product or component. The ePolicy Orchestrator console allows you to configure policy settings for all products and systems from a central location.

Policy categories

Policy settings for most products are grouped by category. Each policy category refers to a specific subset of policy settings. Policies are created by category. In the Policy Catalog page, policies are displayed by product and category. When you open an existing policy or create a policy, the policy settings are organized across tabs.

Where policies are displayed

To see all the policies that have been created per policy category, click Menu | Policy | Policy Catalog, then select a Product and Category from the drop-down lists. On the Policy Catalog page, users can see only policies of the products to which they have permissions.
To see which policies, per product, are applied to a specific group of the System Tree, click Menu | Systems | System Tree | Assigned Policies, select a group, then select a Product from the drop-down list.

A McAfee Default policy exists for each category. You cannot delete, edit, export, or rename these policies, but you can copy them and edit the copy.

How policy enforcement is set

For each managed product or component, choose whether the agent enforces all or none of its policy selections for that product or component.

From the Assigned Policies page, choose whether to enforce policies for products or components on the selected group.

In the Policy Catalog page, you can view policy assignments, where they are applied, and if they are enforced. You can also lock policy enforcement to prevent changes to enforcement below the locked node.

If policy enforcement is turned off, systems in the specified group do not receive updated site lists during an agent-server communication. As a result, managed systems in the group might not function as expected. For example, you might configure managed systems to communicate with Agent Handler A, but with policy enforcement turned off, the managed systems will not receive the new site list with this information, so they report to a different Agent Handler listed in an expired site list.

When policies are enforced

When you reconfigure policy settings, the new settings are delivered to, and enforced on, the managed systems at the next agent-server communication. The frequency of this communication is determined by the Agent-to-server-communication interval (ASCI) settings on the General tab of the McAfee Agent policy pages, or the McAfee Agent Wakeup client task schedule (depending on how you implement agent-server communication). This interval is set to occur once every 60 minutes by default.

Once the policy settings are in effect on the managed system, the agent continues to enforce policy settings locally at a regular interval. This enforcement interval is determined by the Policy enforcement interval setting on the General tab of the McAfee Agent policy pages. This interval is set to occur every five minutes by default.

Policy settings for McAfee products are enforced immediately at the policy enforcement interval, and at each agent-server communication if policy settings have changed.

Exporting and importing policies

If you have multiple servers, you can export and import policies between them using XML files. In such an environment, you only create a policy once.

You can export and import individual policies, or all policies for a given product.

This feature can also be used to back up policies if you reinstall the server.

Policy sharing

Policy sharing is another way to transfer policies between servers. Sharing policies allows you to manage policies on one server, and use them on many more servers all through the McAfee ePO console.
Policy application

Policies are applied to any system by one of two methods, *inheritance* or *assignment*.

**Inheritance**

Inheritance determines whether the policy settings and client tasks for a group or system are taken from its parent. By default, inheritance is enabled throughout the System Tree.

When you break this inheritance by assigning a new policy anywhere in the System Tree, all child groups and systems that are set to inherit the policy from this assignment point do so.

**Assignment**

You can assign any policy in the Policy Catalog to any group or system, provided you have the appropriate permissions. Assignment allows you to define policy settings once for a specific need, then apply the policy to multiple locations.

When you assign a new policy to a particular group of the System Tree, all child groups and systems that are set to inherit the policy from this assignment point do so.

**Assignment locking**

You can lock the assignment of a policy on any group or system, provided you have the appropriate permissions. Assignment locking prevents other users:

- With appropriate permissions at the same level of the System Tree from inadvertently replacing a policy.
- With lesser permissions (or the same permissions but at a lower level of the System Tree) from replacing the policy.

Assignment locking is inherited with the policy settings.

Assignment locking is valuable when you want to assign a certain policy at the top of the System Tree and ensure that no other users replace it anywhere in the System Tree.

Assignment locking only locks the assignment of the policy, but does not prevent the policy owner from making changes to its settings. Therefore, if you intend to lock a policy assignment, make sure that you are the owner of the policy.

**Policy ownership**

All policies for products and features to which you have permissions are available from the *Policy Catalog* page. To prevent any user from editing other users’ policies, each policy is assigned an owner — the user who created it.

Ownership provides that no one can modify or delete a policy except its creator or an administrator. Any user with appropriate permissions can assign any policy in the *Policy Catalog* page, but only the owner or an administrator can edit it.

If you assign a policy that you do not own to managed systems, be aware that if the owner of the named policy modifies it, all systems where this policy is assigned receive these modifications. Therefore, if you wish to use a policy owned by a different user, McAfee recommends that you first duplicate the policy, then assign the duplicate to the desired locations. This provides you ownership of the assigned policy.

💡 You can specify multiple users as owners of a single policy.
Create and maintain policies

Create and maintain policies from the Policy Catalog page.

Tasks

- **Create a policy from the Policy Catalog page on page 176**
  Custom policies created using the Policy Catalog are not assigned to any groups or systems. You can create policies before or after a product is deployed.

- **Manage an existing policy on the Policy Catalog page on page 176**
  You can edit, duplicate, rename, and delete a policy once it is created.

Create a policy from the Policy Catalog page

Custom policies created using the Policy Catalog are not assigned to any groups or systems. You can create policies before or after a product is deployed.

For option definitions, click ? in the interface.

Task

1. Open the New Policy dialog box.
   a. Click Menu | Policy | Policy Catalog.
   b. Select the product and category from the drop-down lists.
      All created policies for the selected category appear in the Details pane.
   c. Click New Policy.

2. Select the policy you want to duplicate from the Create a policy based on this existing policy drop-down list.

3. Type a name for the new policy and click OK.
   The Policy Settings wizard opens.

4. Edit the policy settings on each tab as needed.

5. Click Save.

Manage an existing policy on the Policy Catalog page

You can edit, duplicate, rename, and delete a policy once it is created.

Task

For option definitions, click ? in the interface.

1. To select an existing policy, click Menu | Policy | Policy Catalog, then select the Product and Category from the drop-down lists.
   All created policies for the selected category appear in the details pane.

2. Select the product and category from the lists for the policy to modify.
   All created policies for the selected category appear in the details pane.

3. Select one of these actions.
### Configuring policies for the first time

Follow these high-level steps the first time you configure your policies.

1. Plan product policies for the segments of your System Tree.
2. Create and assign policies to groups and systems.

### Manage policies

Assign and maintain the policies in your environment.
Tasks

- **Change the owners of a policy on page 178**
  By default, ownership is assigned to the user that creates the policy. You can use this task to change the ownership of a policy, but only administrators can perform this task.

- **Move policies between McAfee ePO servers on page 178**
  In order to move policies between McAfee ePO, you must export the policy to an XML file from the Policy Catalog page of the source server, then import it to the Policy Catalog page on the target server.

- **Assign a policy to a System Tree group on page 180**
  Assign a policy to a specific group of the System Tree. You can assign policies before or after a product is deployed.

- **Assign a policy to a managed system on page 180**
  Assign a policy to a specific managed system. You can assign policies before or after a product is deployed.

- **Assign a policy to systems in a System Tree group on page 181**
  Assign a policy to multiple managed systems within a group. You can assign policies before or after a product is deployed.

- **Enforce policies for a product in a System Tree group on page 181**
  Enable or disable policy enforcement for a product in a group. Policy enforcement is enabled by default, and is inherited in the System Tree.

- **Enforce policies for a product on a system on page 181**
  Enable or disable policy enforcement for a product on a managed system. Policy enforcement is enabled by default, and is inherited in the System Tree.

- **Copy policy assignments on page 182**
  Copy policy assignments from one group or system to another. This is an easy way to share multiple assignments between groups and systems from different portions of the System Tree.

Change the owners of a policy

By default, ownership is assigned to the user that creates the policy. You can use this task to change the ownership of a policy, but only administrators can perform this task.

**Task**

For option definitions, click ? in the interface.

1. **Click Menu | Policy | Policy Catalog, then select the Product and Category.**
   All created policies for the selected category appear in the details pane.

2. **Locate the wanted policy, then click the Owner of the policy.**
   The Policy Ownership page appears.

3. **Select the wanted owners of the policy from the list, then click OK.**

Move policies between McAfee ePO servers

In order to move policies between McAfee ePO, you must export the policy to an XML file from the Policy Catalog page of the source server, then import it to the Policy Catalog page on the target server.
Tasks

- **Export a single policy on page 179**
  You can export a single policy to an XML file, then use this file to import the policy to another McAfee ePO server, or to keep as a backup of the policy.

- **Export all policies of a product on page 179**
  Use this task to export all policies of a product to an XML file. Use this file to import the policy to another McAfee ePO server, or to keep as a backup of the policies.

- **Import policies on page 179**
  You can import a policy XML file. Regardless of whether you exported a single policy or all named policies, the import procedure is the same.

**Export a single policy**

You can export a single policy to an XML file, then use this file to import the policy to another McAfee ePO server, or to keep as a backup of the policy.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Policy | Policy Catalog**, then select the **Product** and **Category** from the drop-down lists.
   All created policies for the selected category appear in the details pane.

2. Locate the desired policy, then click **Export** next to the policy.
   The Export page appears.

3. Right-click the link to download and save the file.

4. Name the policy XML file and save it.

   **Tip:** If you plan to import this file into a different McAfee ePO server, ensure that this location is accessible to the target ePolicy Orchestrator server.

**Export all policies of a product**

Use this task to export all policies of a product to an XML file. Use this file to import the policy to another McAfee ePO server, or to keep as a backup of the policies.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Policy | Policy Catalog**, then select the **Product** and **Category**.
   All created policies for the selected category appear in the details pane.

2. Click **Export** next to **Product policies**. The Export page appears.

3. Right-click the link to download and save the file.

   **Tip:** If you plan to import this file into a different McAfee ePO server, ensure that this location is accessible to the target ePolicy Orchestrator server.

**Import policies**

You can import a policy XML file. Regardless of whether you exported a single policy or all named policies, the import procedure is the same.
Task
For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then click Import next to Product policies.
2. Browse to and select the desired policy XML file, then click OK.
3. Select the policies you want to import and click OK.
   The policies are added to the policy catalog.

Assign a policy to a System Tree group
Assign a policy to a specific group of the System Tree. You can assign policies before or after a product is deployed.

Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Assigned Policies, then select a product.
   Each assigned policy per category appears in the details pane.
2. Locate the wanted policy category, then click Edit Assignment.
   The Policy Assignment page appears.
3. If the policy is inherited, select Break inheritance and assign the policy and settings below next to Inherited from.
4. Select the wanted policy from the Assigned policy drop-down list.
   From this location, you can also edit the selected policy's settings, or create a policy.
5. Choose whether to lock policy inheritance.
   Locking policy inheritance prevents any systems that inherit this policy from having another one assigned in its place.
6. Click Save.

Assign a policy to a managed system
Assign a policy to a specific managed system. You can assign policies before or after a product is deployed.

Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Systems, then select a group under System Tree.
   All systems within this group (but not its subgroups) appear in the details pane.
2. Select a system, then click Actions | Agent | Modify Policies on a Single System.
   The Policy Assignment page for that system appears.
3. Select a product.
   The categories of selected product are listed with the system's assigned policy.
4. Locate the wanted policy category, then click Edit Assignments.
5. If the policy is inherited, select Break inheritance and assign the policy and settings below next to Inherited from.
6 Select the wanted policy from the Assigned policy drop-down list.

From this location, you can also edit settings of the selected policy, or create a policy.

7 Choose whether to lock policy inheritance.

Locking policy inheritance prevents any systems that inherit this policy from having another one assigned in its place.

8 Click Save.

Assign a policy to systems in a System Tree group
Assign a policy to multiple managed systems within a group. You can assign policies before or after a product is deployed.

Task
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Systems, then select a group in the System Tree. All systems within this group (but not its subgroups) appear in the details pane.

2 Select the systems you want, then click Actions | Agent | Set Policy & Inheritance. The Assign Policy page appears.

3 Select the Product, Category, and Policy from the drop-down lists.

4 Select whether to Reset inheritance or Break inheritance, then click Save.

Enforce policies for a product in a System Tree group
Enable or disable policy enforcement for a product in a group. Policy enforcement is enabled by default, and is inherited in the System Tree.

Task
For option definitions, click ? in the interface.

1 Click Menu | Systems | System Tree | Assigned Policies, then select the desired group in the System Tree.

2 Select the desired Product, then click the link next to Enforcement Status. The Enforcement page appears.

3 To change the enforcement status you must first select Break inheritance and assign the policy and settings below.

4 Next to Enforcement status, select Enforcing or Not enforcing accordingly.

5 Choose whether to lock policy inheritance.

Locking inheritance for policy enforcement prevents breaking enforcement for groups and systems that inherit this policy.

6 Click Save.

Enforce policies for a product on a system
Enable or disable policy enforcement for a product on a managed system. Policy enforcement is enabled by default, and is inherited in the System Tree.
**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Systems | System Tree | Systems**, then select the group under **System Tree** where the system belongs. The list of systems belonging to this group appears in the details pane.

2. Select the desired system, then click **Actions | Modify Policies on a Single System**. The Policy Assignment page appears.

3. Select the desired **Product**, then click **Enforcing** next to **Enforcement status**. The Enforcement page appears.

4. If you want to change the enforcement status you must first select **Break inheritance and assign the policy and settings below**.

5. Next to **Enforcement status**, select **Enforcing** or **Not enforcing** accordingly.

6. Click **Save**.

**Copy policy assignments**
Copy policy assignments from one group or system to another. This is an easy way to share multiple assignments between groups and systems from different portions of the System Tree.

**Tasks**
- **Copy policy assignments from a group** on page 182
  You can copy policy assignments from one group in the System Tree to another.

- **Copy policy assignments from a system** on page 182
  You can copy policy assignments from a specific system.

- **Paste policy assignments to a group** on page 183
  You can paste policy assignments to a group after you copied them from a group or system.

- **Paste policy assignments to a specific system** on page 183
  You can paste policy assignments to a specific system after copy the policy assignments from a group or system.

**Copy policy assignments from a group**
You can copy policy assignments from one group in the System Tree to another.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Systems | System Tree | Assigned Policies**, then select the desired group in the System Tree.

2. Click **Actions | Copy Assignments**.

3. Select the products or features for which you want to copy policy assignments, then click **OK**.

**Copy policy assignments from a system**
You can copy policy assignments from a specific system.
Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Systems, then select the desired group in the System Tree. The systems belonging to the selected group appear in the details pane.

2. Select the desired system, then click Actions | Agent | Modify Policies on a Single System.

3. Click Actions | Copy Assignments, select the desired products or features for which you want to copy policy assignments, then click OK.

Paste policy assignments to a group
You can paste policy assignments to a group after you copied them from a group or system.

Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Assigned Policies, then select the desired group in the System Tree.

2. In the details pane, click Actions and select Paste Assignments. If the group already has policies assigned for some categories, the Override Policy Assignments page appears.

   When pasting policy assignments, an extra policy appears in the list (Enforce Policies and Tasks). This policy controls the enforcement status of other policies.

3. Select the policy categories you want to replace with the copied policies, then click OK.

Paste policy assignments to a specific system
You can paste policy assignments to a specific system after copy the policy assignments from a group or system.

Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Systems, then select the desired group in the System Tree. All of the systems belonging to the selected group appear in the details pane.

2. Select the system where you want to paste policy assignments, then click Actions | Agent | Modify Policies on a Single System.

3. In the details pane, click Actions | Paste Assignment. If the system already has policies assigned for some categories, the Override Policy Assignments page appears.

   When pasting policy assignments, an extra policy appears in the list (Enforce Policies and Tasks). This policy controls the enforcement status of other policies.

4. Confirm the replacement of assignments.
Policy assignment rules

Policy assignment rules reduce the overhead of managing numerous policies for individual users or systems that meet specific criteria, while maintaining more generic policies across your System Tree. This level of granularity in policy assignment limits the instances of broken inheritance in the System Tree needed to accommodate the policy settings that particular users or systems require. Policy assignments can be based on either user specific or system specific criteria:

- **User-based policies** — Policies that include at least one user specific criteria. For example, you can create a policy assignment rule that is enforced for all users in your engineering group. You can then create another policy assignment rule for members of your IT department so they can log on to any computer in the engineering network with the access rights they need to troubleshoot problems on a specific system in that network. User based policies *can* also include system based criteria.

- **System-based policies** — Policies that include only system based criteria. For example, you can create a policy assignment rule that is enforced for all servers on your network based on the tags you've applied, or all systems in a specific location in your System Tree. System based policies *cannot* include user based criteria.

Policy assignment rule priority

Policy assignment rules can be prioritized to simplify maintenance of policy assignment management. When you set priority to a rule, it is enforced before other assignments with a lower priority. In some cases, the outcome can be that some rule settings are overridden. For example, consider a user or system that is included in two policy assignment rules, rules A and B. Rule A has priority level 1, and allows included users unrestricted access to internet content. Rule B has priority level 2, and heavily restricts the same user's access to internet content. In this scenario, rule A is enforced because it has higher priority. As a result, the user has unrestricted access to internet content.

How multi-slot policies work with policy assignment rule priority

Priority of rules is not considered for multi-slot policies. When a single rule containing multi-slot policies of the same product category is applied, all settings of the multi-slot policies are combined. Similarly, if multiple rules containing multi-slot policy settings are applied, all settings from each multi-slot policy are combined. As a result, the applied policy is a combination of the settings of each individual rule.

When multi-slot policies are aggregated, they are aggregated only with multi-slot policies of the same type; user-based or system-based. However, multi-slot policies assigned using policy assignment rules are not aggregated with multi-slot policies assigned in the System Tree. Multi-slot policies assigned using policy assignment rules override policies assigned in the System Tree. Furthermore, user-based policies take priority over system-based policies. Consider the following scenario where:

<table>
<thead>
<tr>
<th>Policy type</th>
<th>Assignment type</th>
<th>Policy name</th>
<th>Policy settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generic policy</td>
<td>Policy assigned in the System Tree</td>
<td>A</td>
<td>Prevents internet access from all systems to which the policy is assigned.</td>
</tr>
<tr>
<td>System-based</td>
<td>Policy assignment rule</td>
<td>B</td>
<td>Allows internet access from systems with the tag &quot;IsLaptop.&quot;</td>
</tr>
<tr>
<td>User-based</td>
<td>Policy assignment rule</td>
<td>C</td>
<td>Allows unrestricted internet access to all users in the Admin user group from all systems.</td>
</tr>
</tbody>
</table>
Scenario: Using multi-slot policies to control Internet access

In your System Tree, there is a group named "Engineering" which consists of systems tagged with either "IsServer" or "IsLaptop." In the System Tree, policy A is assigned to all systems in this group. Assigning policy B to any location in the System Tree above the Engineering group using a policy assignment rule overrides the settings of policy A, and allows systems tagged with "IsLaptop" to access the internet. Assigning policy C to any group in the System Tree above the Engineering group allows users in the Admin user group to access the internet from all systems, including those in the Engineering group tagged with "IsServer."

Excluding Active Directory objects from aggregated policies.

Because rules that consist of multi-slot policies are applied to assigned systems without regard to priority, you might need to prevent policy setting aggregation in some instances. You can prevent aggregation of user-based multi-slot policy settings across multiple policy assignment rules by excluding a user (or other Active Directory objects such as a group or organizational unit) when creating the rule. For more information on the multi-slot policies that can be used in policy assignment rules, refer to the product documentation for the managed product you are using.

About user-based policy assignments

User-based policy assignment rules give you the ability to create user-specific policy assignments. These assignments are enforced at the target system when a user logs on.

On a managed system, the agent keeps a record of the users who log on to the network. The policy assignments you create for each user are pushed down to the system they log on to, and are cached during each agent-server communication. The agent applies the policies that you have assigned to each user.

When a user logs on to a managed system for the first time, there can be a slight delay while the agent contacts its assigned server for the policy assignments specific to this user. During this time, the user has access only to that functionality allowed by the default machine policy, which typically is your most secure policy.

To use user-based policy assignments, register and configure a registered LDAP server for use with your ePolicy Orchestrator server.

About migrating legacy policy assignment rules

Policy assignment rules created using a version 4.5 ePolicy Orchestrator server were user-based by default. For migrated legacy policy assignment rules with no user-based criteria specified, the rules are evaluated as user-based. However, when creating a new user-based policy assignment rule, specify at least one user-based criteria.

Applying your migrated legacy user-based policy assignment rules causes your ePolicy Orchestrator server to perform a lookup on the LDAP server for every managed system in your network at each agent-server communication interval.

About system-based policy assignments

System-based policies allow you to assign policies to systems using system-based criteria.

You can assign a system-based policy using two types of system-based criteria:

- **System Tree location** — All policy assignment rules require that System Tree location is specified.
- **Tags** — Assign policies to systems based on the tags you have applied.
Once you have defined and applied a tag to your systems, you can create a policy assignment rule to assign policies to any system with that tag. This functionality is useful in cases when you want all systems of a particular type to have the same security policy, regardless of their location in the System Tree.

**Use tags to assign system-based policies**

Using tags to assign system-based policies simplifies automating policy assignment. System-based policies which specify tags as criteria work in a similar fashion to user-based policies. They are assigned based on selection criteria you define using the Policy Assignment Builder. Any system you can tag, you can apply a specific policy to, based on that tag.

**Scenario: Creating new SuperAgents using tags**

You've decided to create a new set of SuperAgents in your environment, but you don't have time to manually identify the systems in your System Tree that will host these SuperAgents. Instead, you can use the Tag Builder to tag all systems that meet a specific set of criteria with a new tag: "isSuperAgent." Once you've built the tag, you can create a Policy Assignment Rule that applies your SuperAgent policy settings to every system tagged with "isSuperAgent."

Once the tag is created, you can use the Run Tag Criteria action from the Tag Catalog page, and as each system with the new tag calls in at its regular interval, it is assigned a new policy based on your isSuperAgent Policy Assignment Rule.

**Create policy assignment rules**

Creating policy assignment rules allow you to enforce policies for users or systems based on configured rule criteria. For option definitions, click ? in the interface.

**Task**

1. Open the Policy Assignment Builder.
   
   a. Click **Menu** | **Policy** | **Policy Assignment Rules**.

   b. Click **New Assignment Rule**.

2. Specify the details for this policy assignment rule, including:

   - A unique **Name** and **Description**.
   - The **Rule Type**. The rule type you specify determines which criteria is available on the **Selection Criteria** page.

   By default, the priority for new policy assignment rules is assigned sequentially based on the number of existing rules. After you've create the rule, you can edit the priority by clicking **Edit Priority** on the **Policy Assignment Rules** page.

3. Click **Next**.

4. Click Add Policy to select the policies that you want to be enforced by this policy assignment rule.

5. Click **Next**.

6. Specify the criteria you want to use in this rule. Your criteria selection determines which systems or users are assigned this policy.

7. Review the summary and click **Save**.
Manage policy assignment rules

Use this table to perform common management tasks when working with policy assignment rules.

To perform these actions, click Menu | Policy | Policy Assignment Rules. Select the action to perform from the Actions menu or the Actions column.

<table>
<thead>
<tr>
<th>To do this...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete a policy assignment rule</td>
<td>Click Delete in the selected assignment row.</td>
</tr>
<tr>
<td>Edit a policy assignment rule</td>
<td>Click on the selected assignment. The Policy Assignment Builder wizard opens. Work through each page of this wizard to modify this policy assignment rule.</td>
</tr>
<tr>
<td>Export policy assignment rules</td>
<td>Click Export. The Download Policy Assignment Rules page opens, where you can view or download the PolicyAssignmentRules.xml file.</td>
</tr>
<tr>
<td>Import policy assignment rules</td>
<td>Click Import. The Import Policy Assignment Rules dialog box opens, from which you can browse to a previously downloaded PolicyAssignmentRules.xml file. You are prompted to choose which rules included in the file to import. You can select which rules to import and, if any rules in the file have the same name as those already in your Policy Assignment Rules list, you can select which to retain.</td>
</tr>
<tr>
<td>Edit the priority of a policy assignment rule</td>
<td>Click Edit Priority. The Policy Assignment Rule</td>
</tr>
<tr>
<td>View the summary of a policy assignment rule</td>
<td>Click &gt; in the selected assignment row.</td>
</tr>
</tbody>
</table>

Create policy management queries

Retrieve the policies assigned to a managed system, or policies broken in the system hierarchy.

You can create either of the following Policy Management queries:

- **Applied Policies** — Retrieves policies assigned to a specified managed system.
- **Broken Inheritance** — Retrieves information on policies that are broken in the system hierarchy.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Reporting | Queries & Reports, then click Actions | New.
   The Query Builder wizard opens.
2. On the Result Type page, select Policy Management from the Feature Group list.
3. Select one of these Result Types, then click Next to display the Chart page:
   - Applied Client Tasks
   - Applied Policies
   - Client Tasks Assignment Broken Inheritance
   - Policies Assignment Broken Inheritance
4. Select the type of chart or table to display the primary results of the query, then click Next.
   The Columns page appears.

- If you select Boolean Pie Chart, you must configure the criteria you want to include in the query.
5 Select the columns to be included in the query, then click Next. The Filter page appears.

6 Select properties to narrow the search results, then click Run. The Unsaved Query page displays the results of the query, which is actionable.

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7 In the Unsaved Query page, take any available actions on items in any tables or drill-down tables.
   - If the query didn’t return the expected results, click Edit Query to go back to the Query Builder and edit the details of this query.
   - If you don’t need to save the query, click Close.
   - If you want to use again this query again, click Save and continue to the next step.

8 In the Save Query page, type a name for the query, add any notes, and select one of the following:
   - New Group — Type the new group name and select either:
     - Private group (My Groups)
     - Public group (Shared Groups)
   - Existing Group — Select the group from the list of Shared Groups.

9 Click Save.

---

**View policy information**

View detailed information about your policies, including policy owners, assignments, and inheritance.

**Tasks**

- **View groups and systems where a policy is assigned** on page 189
  View the groups and systems where a policy is assigned. This list shows the assignment points only, not each group or system that inherits the policy.
- **View policy settings** on page 189
  View details for a policy assigned to a product category or system.
- **View policy ownership** on page 189
  View the owners of a policy.
- **View assignments where policy enforcement is disabled** on page 189
  View assignments where policy enforcement, per policy category, is disabled.
- **View policies assigned to a group** on page 190
  View the policies assigned to a System Tree group, sorted by product.
- **View policies assigned to a specific system** on page 190
  View the product policies assigned to a system in the System Tree.
- **View policy inheritance for a group** on page 190
  View the policy inheritance of a specific group.
- **View and reset broken inheritance** on page 190
  Identify the groups and systems where policy inheritance is broken.
- **Compare policies** on page 191
  You can compare like policies using Policy Comparison. This allows you to determine which setting are different and which are the same.
View groups and systems where a policy is assigned

View the groups and systems where a policy is assigned. This list shows the assignment points only, not each group or system that inherits the policy.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then select the desired Product and Category. All created policies for the selected category appear in the details pane.

2. Under Assignments on the row of the desired policy, click the link that indicates the number of groups or systems the policy is assigned to (for example, 6 assignments). On the Assignments page, each group or system where the policy is assigned appears with its Node Name and Node Type.

View policy settings

View details for a policy assigned to a product category or system.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then select the desired Product and Category. All created policies for the selected category appear in the details pane.

2. Click next to the desired policy. The policy pages and their settings appear.

You can also view this information when accessing the assigned policies of a specific group. To access this information click Menu | Systems | System Tree | Assigned Policies, then click the link for the selected policy in the Policy column.

View policy ownership

View the owners of a policy.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then select the desired Product and Category. All created policies for the selected category appear in the details pane.

2. The owners of the policy are displayed under Owner.

View assignments where policy enforcement is disabled

View assignments where policy enforcement, per policy category, is disabled.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then select the desired Product and Category. All created policies for the selected category appear in the details pane.
2 Click the link next to **Product enforcement status**, which indicates the number of assignments where enforcement is disabled, if any.
   
   The **Enforcement for <policy name>** page appears.

3 Click any item in the list to go to its **Assigned Policies** page.

### View policies assigned to a group

View the policies assigned to a System Tree group, sorted by product.

**Task**

For option definitions, click ? in the interface.

1 Click **Menu | Systems | System Tree | Assigned Policies**, then select a group in the System Tree.
   
   All assigned policies, organized by product, appear in the details pane.

2 Click any policy to view its settings.

### View policies assigned to a specific system

View the product policies assigned to a system in the System Tree.

**Task**

For option definitions, click ? in the interface.

1 Click **Menu | Systems | System Tree | Systems**, then select the desired group in the System Tree.
   
   All systems belonging to the group appear in the details pane.

2 Select the system, then click **Actions | Agent | Modify Policies on a Single System**.

3 Select the product.
   
   The product’s policies assigned to this system appear.

4 Click any policy to view its settings.

### View policy inheritance for a group

View the policy inheritance of a specific group.

For option definitions, click ? in the interface.

**Task**

1 Click **Menu | Systems | System Tree | Assigned Policies**.
   
   All assigned policies, organized by product, appear in the details pane.

2 The desired policy row, under **Inherit from**, displays the name of the group from which the policy is inherited.

### View and reset broken inheritance

Identify the groups and systems where policy inheritance is broken.
Task
For option definitions, click ? in the interface.

1. Click Menu | Systems | System Tree | Assigned Policies.
   All assigned policies, organized by product, appear in the details pane. The desired policy row, under Broken Inheritance, displays the number of groups and systems where this policy’s inheritance is broken.
   
   This is the number of groups or systems where the policy inheritance is broken, not the number of systems that do not inherit the policy. For example, if only one group does not inherit the policy, this is represented by 1 doesn't inherit, regardless of the number of systems within the group.

2. Click the link indicating the number of child groups or systems that have broken inheritance.
   The View broken inheritance page displays a list of the names of these groups and systems.

3. To reset the inheritance of any of these, select the checkbox next to the name, then click Actions and select Reset Inheritance.

Compare policies
You can compare like policies using Policy Comparison. This allows you to determine which setting are different and which are the same.

Many of the values and variables included in Policy Comparison are specific to each product. For option definitions not included in the table, see the documentation for the product that provides the policy you want to compare.

Task
For option definitions, click ? in the interface.

1. Click Menu | Policy Comparison, then select the desired Product, Category, and Show settings from the lists.
   These settings populate the policies to compare in the Policy 1 and Policy 2 lists.

2. Select the policies to compare in the Compare Policies row from the Policy 1 and the Policy 2 column lists.
   The top two rows of the table display the number of settings that are different and identical. You can also change the Show setting, to reduce the data being displayed, from All Policy Settings to, Policy Differences and Policy Matches.

3. Click Print, to open a printer friendly view of this comparison.

Share policies among McAfee ePO servers
Administrators use policy sharing to designate policies that are developed on one server to be transmitted to other servers for implementation.
Administrators only need to perform three steps to share policies between servers.

1. Designate the policy for sharing.

2. Register the servers that will share the policy.

3. Schedule a server task to distribute the shared policy.
Distribute your policy to multiple McAfee ePO servers

Configure policy sharing for use with multiple McAfee ePO servers. McAfee recommends completing these tasks in the sequence listed here.

If the policy needs to be modified after it has been shared, edit the policy and run the shared policies task again. It might be prudent to inform local administrators of the change.

Tasks

- **Register servers for policy sharing on page 192**
  You can register servers to share a policy.

- **Designate policies for sharing on page 192**
  You can designate a policy for sharing among multiple McAfee ePO servers.

- **Schedule server tasks to share policies on page 192**
  You can schedule a server task so that policies are shared among multiple McAfee ePO servers.

Register servers for policy sharing

You can register servers to share a policy.

For option definitions, click ? in the interface.

**Task**

1. Click Menu | Configuration | Registered Servers, then click New Server. The Registered Server Builder wizard opens to the Description page.

2. From the Server type menu, select ePO, specify a name and any notes, then click Next. The Details page appears.

3. Specify any details for your server and click Enable in the Policy sharing field, then click Save.

Designate policies for sharing

You can designate a policy for sharing among multiple McAfee ePO servers.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Policy | Policy Catalog, then click Product menu and select the product whose policy you want to share.

2. In the Actions column for the policy to be shared, click Share.

Beginning with ePolicy Orchestrator 4.6, shared policies are automatically pushed to ePolicy Orchestrator servers with policy sharing enabled. When you click Share in step 2, the policy is immediately pushed to all registered ePolicy Orchestrator servers that have policy sharing enabled. Changes to shared policies are similarly pushed.

Schedule server tasks to share policies

You can schedule a server task so that policies are shared among multiple McAfee ePO servers.
**Task**

For option definitions, click `?` in the interface.

1. Click **Menu | Automation | Server Tasks**, then click **Actions | New Task**. The Server Task Builder wizard opens.

2. On the Description page, specify the name of the task and any notes, then click **Next**. The Actions page appears.

   New server tasks are enabled by default. If you do not want this task to be enabled, select **Disabled** in the **Schedule status** field.

3. From the Actions drop-down menu, select **Share Policies**, then click **Next**. The Schedule page appears.

4. Specify the schedule for this task, then click **Next**. The Summary page opens.

5. Review the summary details, then click **Save**.
Policy management
Distribute your policy to multiple McAfee ePO servers
Create and schedule client tasks to automate how you manage systems in your network. The extension files installed on your McAfee ePO server determine which client tasks are available.

Client tasks are commonly used for the following activities.

- Product deployment
- Product functionality (for example, the VirusScan Enterprise On-Demand Scan task)
- Upgrades and updates

For information about which client tasks are available and what they can help you do, see the product documentation for your managed products.

**Contents**

- How the Client Task Catalog works
- Deployment tasks
- Use the Product Deployment task to deploy products to managed systems
- Update tasks
- Manage client tasks

**How the Client Task Catalog works**

Use the Client Task Catalog to create client task objects you can reuse to help manage systems in your network.

The Client Tasks Catalog applies the concept of logical objects to ePolicy Orchestrator client tasks. You can create client task objects for a variety of purposes without the need to assign them immediately. As a result, you can treat these objects as reusable components when assigning and scheduling client tasks.

Client tasks can be assigned at any level in the System Tree, and are inherited by groups and systems lower in the tree. As with Policies and policy assignments, you can break the inheritance for an assigned client task.

Client task objects can be shared across multiple registered ePolicy Orchestrator servers in your environment. When client task objects are set to be shared, each registered server receives a copy after your Share Client Task server task runs. Any changes made to the task are updated each time it runs. When a client task object is shared, only the owner of the object can modify its settings.

Administrators on the target server that receives a shared task is not an owner for that shared task. None of the users on the target server is owner for any shared task objects the target receives.
Deployment tasks

Deployment tasks are client tasks that are used to deploy managed security products to your managed systems from the Master Repository.

You can create and manage individual deployment task objects using the client task catalog, then assign them to run on groups or individual system. Alternatively, you can create Product Deployment projects to deploy products to your systems. Product Deployment projects automate the process of creating and scheduling client task objects individually. They also provide additional automated management functionality.

Important considerations

When deciding how to stage your Product Deployment, consider:

- Package size and available bandwidth between the Master Repository and managed systems. In addition to potentially overwhelming the McAfee ePO server or your network, deploying products to many systems can make troubleshooting problems more complicated.

- A phased rollout to install products to groups of systems at a time. If your network links are fast, try deploying to several hundred clients at a time. If you have slower or less reliable network connections, try smaller groups. As you deploy to each group, monitor the deployment, run reports to confirm successful installations, and troubleshoot any problems with individual systems.

Deploying products on selected systems

If you are deploying McAfee products or components that are installed on a subset of your managed systems:

1. Use a tag to identify these systems.
2. Move the tagged systems to a group.
3. Configure a Product Deployment client task for the group.

Deployment packages for products and updates

The ePolicy Orchestrator software deployment infrastructure supports deploying products and components, as well as updating both.

Each McAfee product that ePolicy Orchestrator can deploy provides a product deployment package zip file. The zip file contains product installation files, which are compressed in a secure format. ePolicy Orchestrator can deploy these packages to any of your managed systems, once they are checked in to the master repository.

These zip files are used for both detection definition (DAT) and engine update packages.

You can configure product policy settings before or after deployment. McAfee recommends configuring policy settings before deploying the product to network systems. This saves time and ensures that your systems are protected as soon as possible.

These package types can be checked in to the master repository with pull tasks, or manually.
Supported package types

<table>
<thead>
<tr>
<th>Package type</th>
<th>Description</th>
<th>Origination</th>
</tr>
</thead>
<tbody>
<tr>
<td>SuperDAT (SDAT.exe) files</td>
<td>The SuperDAT files contain both DAT and engine files in one update package. If bandwidth is a concern, McAfee recommends updating DAT and engine files separately.</td>
<td>McAfee website. Download and check SuperDAT files in to the master repository manually.</td>
</tr>
<tr>
<td>Supplemental detection definition (ExtraDAT) files</td>
<td>The ExtraDAT files address one or more specific threats that have appeared since the last DAT file was posted. If the threat has a high severity, distribute the ExtraDAT immediately, rather than wait until that signature is added to the next DAT file. ExtraDAT files are from the McAfee website. You can distribute them through ePolicy Orchestrator. Pull tasks do not retrieve ExtraDAT files.</td>
<td>McAfee website. Download and check supplemental DAT files in to the master repository manually.</td>
</tr>
<tr>
<td>Product deployment and update packages</td>
<td>A product deployment package contains the installation software of a McAfee product.</td>
<td>Product CD or downloaded product zip file. Check product deployment packages in to the master repository manually. For specific locations, see the documentation for that product.</td>
</tr>
<tr>
<td>Agent language packages</td>
<td>An agent language package contains files necessary to display agent information in a local language.</td>
<td>Master repository — Checked in at installation. For future versions of the agent, you must check agent language packages into the master repository manually.</td>
</tr>
</tbody>
</table>

Package signing and security

All packages created and distributed by McAfee are signed with a key pair using the DSA (Digital Signature Algorithm) signature verification system, and are encrypted using 168-bit 3DES encryption. A key is used to encrypt or decrypt sensitive data.

You are notified when you check in packages that are not signed by McAfee. If you are confident of the content and validity of the package, continue with the check-in process. These packages are secured in the same manner described above, but are signed by ePolicy Orchestrator when they are checked in.

Digital signatures guarantee that packages originated from McAfee or were checked in by you, and that they have not been tampered with or corrupted. The agent only trusts package files signed by ePolicy Orchestrator or McAfee. This protects your network from receiving packages from unsigned or untrusted sources.

Package ordering and dependencies

If one product update is dependent on another, you must check in the update packages to the master repository in the required order. For example, if Patch 2 requires Patch 1, you must check in Patch 1 before Patch 2. Packages cannot be reordered once they are checked in. You must remove them and check them in again, in the proper order. If you check in a package that supersedes an existing package, the existing package is removed automatically.
Product and update deployment
The McAfee ePO repository infrastructure allows you to deploy product and update packages to your managed systems from a central location. Although the same repository is used, there are differences.

Product deployment vs. update packages

<table>
<thead>
<tr>
<th>Product deployment packages</th>
<th>Update packages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must be manually checked in to the master repository.</td>
<td>DAT and Engine update packages can be copied from the source site automatically with a pull task. All other update packages must be checked in to the master repository manually.</td>
</tr>
<tr>
<td>Can be replicated to the master repository and installed automatically on managed systems using a deployment task.</td>
<td>Can be replicated to the master repository and installed automatically on managed systems with global updating.</td>
</tr>
<tr>
<td>If not implementing global updating for product deployment, a deployment task must be configured and scheduled for managed systems to retrieve the package.</td>
<td>If not implementing global updating for product updating, an update client task must be configured and scheduled for managed systems to retrieve the package.</td>
</tr>
</tbody>
</table>

Product deployment and updating process
Follow this high-level process for distributing DAT and Engine update packages.

1. Check in the update package to the master repository with a pull task, or manually.

2. Do one of the following:
   - If you are using global updating, create and schedule an update task for laptop systems that leave the network.
   - If you are not using global updating, perform the following tasks.
     1. Use a replication task to copy the contents of the master repository.
     2. Create and schedule an update task for agents to retrieve and install the update on managed systems.

Configuring product and update deployments for the first time
Follow this process to ensure that your product and update deployments are completed successfully.

When deploying products for the first time:

1. Configure server tasks for repository pull and repository replication.

2. Check in product and update packages to the master repository using the Software Manager.


Use the Product Deployment task to deploy products to managed systems
Deploy products to managed systems with the Product Deployment client task.
You can create this task for a single system, or for groups of the System Tree.
Tasks

- **Configure a deployment task for groups of managed systems on page 199**
  Configure a product deployment task to deploy products to groups of managed systems in the System Tree.

- **Configure a deployment task to install products on a managed system on page 200**
  Deploy products to a single system using a product deployment task.

**Configure a deployment task for groups of managed systems**

Configure a product deployment task to deploy products to groups of managed systems in the System Tree.

For option definitions, click ? in the interface.

**Task**

1. Open the New Task dialog box.
   a. Click **Menu** | **Policy** | **Client Task Catalog**.
   b. Under **Client Task Types**, select **McAfee Agent** | **Product Deployment**.
   c. Click **New Task**.

2. Ensure that **Product Deployment** is selected, then click **OK**.

3. Type a name for the task you are creating and add any notes.

4. Next to **Target platforms**, select the types of platform to use the deployment.

5. Next to **Products and components** set the following:
   - Select the wanted product from the first drop-down list. The products listed are those products for which you have already checked in a package to the Master Repository. If you do not see the product you want to deploy listed here, check in the product package.
   - Set the **Action** to **Install**, then select the **Language** of the package, and the **Branch**.
   - To specify command-line installation options, type the wanted command-line options in the **Command line** text field. See the product documentation for information on command-line options of the product you are installing.

   ![Information icon]

   You can click + or – to add or remove products and components from the list displayed.

6. Next to **Options**, select if you want to run this task for every policy enforcement process (Windows only) and click **Save**.

7. Click **Menu** | **Systems** | **System Tree** | **Assigned Client Tasks**, then select the required group in the System Tree.

8. Select the **Preset** filter as **Product Deployment (McAfee Agent)**.
   Each assigned client task per selected category appears in the details pane.

9. Click **Actions** | **New Client Task Assignment**.

10. On the **Select Task** page, select **Product** as **McAfee Agent** and **Task Type** as **Product Deployment**, then select the task you created for deploying product.
Next to Tags, select the wanted platforms to which you are deploying the packages, then click Next:

- Send this task to all computers
- Send this task to only computers that have the following criteria — Use one of the edit links to configure the criteria.

12 On the Schedule page, select whether the schedule is enabled, and specify the schedule details, then click Next.

13 Review the summary, then click Save.

**Configure a deployment task to install products on a managed system**

Deploy products to a single system using a product deployment task.

Create a product deployment client task for a single system when that system requires:

- A product installed that other systems within the same group do not require.
- A different schedule than other systems in the group. For example, if a system is located in a different time zone than its peers.

For option definitions, click ? in the interface.

**Task**

1 Open the New Task dialog box.
   a Click Menu | Policy | Client Task Catalog.
   b Under Client Task Types, select McAfee Agent | Product Deployment.
   c Click New Task.

2 Ensure that Product Deployment is selected, then click OK.

3 Type a name for the task you are creating and add any notes.

4 Next to Target platforms, select the types of platform to use the deployment.

5 Next to Products and components, set the following:
   - Select a product from the first drop-down list. The products listed are those products for which you have already checked in a package to the Master Repository. If you do not see the product you want to deploy listed here, check in that product’s package.
   - Set the Action to Install, then select the Language of the package, and the Branch.
   - To specify command-line installation options, type the command-line options in the Command line text field. See the product documentation for information on command-line options of the product you are installing.

   You can click + or – to add or remove products and components from the list displayed.

6 Next to Options, select if you want to run this task for every policy enforcement process (Windows only), then click Save.

7 Click Menu | Systems | System Tree | Systems, then select the system on which you want to deploy a product, then click Actions | Agent | Modify Tasks on a single system.

8 Click Actions | New Client Task Assignment.
9 On the **Select Task** page, select **Product** as **McAfee Agent** and **Task Type** as **Product Deployment**, then select the task you created for deploying product.

10 Next to **Tags**, select the platforms to which you are deploying the packages, then click **Next**:
   - **Send this task to all computers**
   - **Send this task to only computers that have the following criteria** — Use one of the edit links to configure the criteria.

11 On the **Schedule** page, select whether the schedule is enabled, and specify the schedule details, then click **Next**.

12 Review the summary, then click **Save**.

---

**Update tasks**

If you do not use global updating, determine when agents on managed systems go for updates.

You can create and configure update client tasks to control when and how managed systems receive update packages. If you are not using global updating, creating these tasks are the only way you can control client updating with the ePolicy Orchestrator software.

If you use global updating, this task is not necessary, although you can create a daily task for redundancy.

**Considerations when creating update client tasks**

Consider the following when scheduling client update tasks:

- Create a daily Update client task at the highest level of the System Tree, so that all systems inherit the task. If your organization is large, you can use randomization intervals to mitigate the bandwidth impact. For networks with offices in different time zones, balance network load by running the task at the local system time of the managed system, rather than at the same time for all systems.
- If you are using scheduled replication tasks, schedule the task at least an hour after the scheduled replication task.
- Run update tasks for DAT and Engine files at least once a day. Managed systems might be logged off from the network and miss the scheduled task. Running the task frequently ensures that these systems receive the update.
- Maximize bandwidth efficiency and create several scheduled client update tasks that update separate components and run at different times. For example, you can create one task to update only DAT files, then create another to update both DAT and Engine files weekly or monthly (Engine packages are released less frequently).
- Create and schedule more tasks to update products that do not use the agent for Windows.
- Create a task to update your main workstation applications, to ensure that they all receive the update files. Schedule it to run daily or several times a day.

**Update managed systems regularly with a scheduled update task**

Create and configure update tasks. If you use global updating, we recommend using a daily update client task to ensure systems are current with the latest DAT and engine files.

For option definitions, click ? in the interface.
Task

1. Open the New Task dialog box.
   a. Click Menu | Policy | Client Task Catalog.
   b. Under Client Task Types, select McAfee Agent | Product Deployment.
   c. Click New Task.

2. Verify that Product Update is selected, then click OK.

3. Type a name for the task you are creating and add any notes.

4. Next to Update in Progress dialog Box, select if you want the users to be aware an update is in process and if you want to allow them to postpone the process.

5. Next to Package types, select one of these, then click Save:
   a. All packages
   b. Selected packages — If selected, you must configure which of the following to include:
      i. Signatures and engines
      When configuring individual signatures and engines, if you select Engine and deselect DAT, when the new engine is updated a new DAT is automatically updated to ensure complete protection.
      ii. Patches and service packs

6. Click Menu | Systems | System Tree | Systems, then select the system on which you want to deploy the product update, then click Actions | Agent | Modify Tasks on a single system.

7. Click Actions | New Client Task Assignment.

8. On the Select Task page, make the following selections:

<table>
<thead>
<tr>
<th>Option</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>McAfee Agent</td>
</tr>
<tr>
<td>Task Type</td>
<td>Product Deployment</td>
</tr>
</tbody>
</table>

Then select the task you created for deploying the product update.

9. Next to Tags, select the desired platforms to which you are deploying the packages, then click Next:
   a. Send this task to all computers
   b. Send this task to only computers that have the following criteria — Use one of the edit links to configure the criteria.

10. On the Schedule page, select whether the schedule is enabled, and specify the schedule details, then click Next.

11. Review the summary, then click Save.

The task is added to the list of client tasks for the groups and systems to which it is applied. Agents receive the new update task information the next time they communicate with the server. If the task is enabled, the update task runs at the next occurrence of the scheduled day and time. Each system updates from the appropriate repository, depending on how the policies for that client's agent are configured.
Confirm that clients are using the latest DAT files

Check the version of DAT files on managed systems using Queries.

- Click Menu | Reporting | Queries, select VSE: DAT Deployment in the Queries list, then click Actions | Run.

See the VirusScan Enterprise documentation for more information on this query.

Evaluate new DATs and engines before distribution

You might want to test DAT and engine files on a few systems before deploying them to your entire organization. You can test update packages using the Evaluation branch of your master repository. The ePolicy Orchestrator software provides three repository branches for this purpose.

For option definitions, click ? in the interface.

Task

1. Create a scheduled Repository Pull task that copies update packages in the Evaluation branch of your master repository. Schedule it to run after McAfee releases updated DAT files. For additional information, see Deploying update packages with pull and replication tasks.

2. Create or select a group in the System Tree to serve as an evaluation group, and create a McAfee Agent policy for the systems to use only the Evaluation branch (in the Repository Branch Update Selection section of the Updates tab).

   The policies take affect the next time the agent calls in to the server. The next time the agent updates, it retrieves them from the Evaluation branch. For additional information, see Configuring the Deployment task for groups of managed systems.

3. Create a scheduled Update client task for the evaluation systems that updates DAT and engine files from the Evaluation branch of your repository. Schedule it to run one or two hours after your Repository Pull task is scheduled to begin.

   The evaluation update task created at the evaluation group level causes it to run only for that group. For additional information, see Updating managed systems regularly with a scheduled update task.

4. Monitor the systems in your evaluation group until satisfied.

5. Move the packages from the Evaluation branch to the Current branch of your master repository. Click Menu | Software | Master Repository to open the Master Repository page.

   Adding them to the Current branch makes them available to your production environment. The next time any Update client tasks run that retrieves packages from the Current branch, the new DAT and engine files are distributed to systems that use the task. For additional information, see Checking in packages manually.

Manage client tasks

Create and maintain client tasks.
Tasks

- **Create client tasks on page 204**
  Use client tasks to automatically deploy product software, perform product updates, and more. The process is similar for all client tasks.

- **Edit client tasks on page 204**
  You can edit any previously configured client task settings or schedule information.

- **Delete client tasks on page 205**
  You can delete any previously configured client tasks.

- **Compare client tasks on page 205**
  You can compare like client tasks using the Client Task Comparison tool. This allows you to determine which settings are different and which are the same.

Create client tasks

Use client tasks to automatically deploy product software, perform product updates, and more. The process is similar for all client tasks.

In some cases you must create a new client task assignment to associate a client task to a **System Tree** group.

For option definitions, click ? in the interface.

**Task**

1. Open the **New Task** dialog box.
   a. Click **Menu | Policy | Client Task Catalog**.
   b. Under **Client Task Types**, select **McAfee Agent | Product Deployment**.
   c. Click **New Task**.

2. Select a task type from the list, click **OK** and the **Client Task Builder** wizard opens.
   For example, select **Product Update**.

3. Type a name for the task you are creating, add a description, then configure the settings specific to the task type you are creating.

   **i** The configuration options change depending on the task type selected.

4. Review the task settings, then click **Save**.

   The task is added to the list of client tasks for the selected client task type.

Edit client tasks

You can edit any previously configured client task settings or schedule information.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Policy | Client Task Catalog** and the Client Task Catalog dialog box appears.

2. Select the Client Task Type from the navigation tree on the left and the available client tasks appear in the window on the right.

3. Double-click the client task name and it appears in the Client Task Catalog dialog box.

4. Edit the task settings as needed, then click **Save**.
The managed systems receive these changes the next time the agents communicate with the server.

**Delete client tasks**
You can delete any previously configured client tasks.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu | Policy | Client Task Catalog** and the Client Task Catalog dialog box appears.

2. Select the Client Task Type from the navigation tree on the left and the available client tasks appear in the window on the right.

3. From the **Actions** column, click **Delete** next to the desired client task.

4. Click **OK**.

**Compare client tasks**
You can compare like client tasks using the Client Task Comparison tool. This allows you to determine which settings are different and which are the same.

Many of the values and variables included on this page are specific to each product. For option definitions not included in the table, see the product documentation for the product that provides the Client Task you want to compare.

For option definitions, click ? in the interface.

**Task**

1. Click **Menu | Client Task Comparison**, then select a **Product**, **Client Task Type**, and **Show** settings from the lists. These settings populate the client tasks to compare in the Client Task 1 and Client Task 2 lists.

2. Select the client tasks to compare in the **Compare Client Tasks** row from the **Client Task 1** and the **Client Task 2** column lists.

   The top two rows of the table display the number of settings that are different and identical. To reduce the amount of data that is displayed, you can also change the **Show** setting from **All Client Task Settings**, to **Client Task Differences** and **Client Task Matches**.

3. Click **Print** to open a printer-friendly view of this comparison.
15 Server tasks

Server tasks are configurable actions that run on your ePolicy Orchestrator server on a schedule. You can leverage server tasks to help automate repetitive server tasks that need to be performed on your server.

McAfee ePO software includes preconfigured server tasks and actions by default. Most of the additional software products you manage with your ePolicy Orchestrator server also add preconfigured server tasks.

Contents
- Global updating
- Deploy update packages automatically with global updating
- Pull tasks
- Replication tasks
- Repository selection
- Accepted Cron syntax when scheduling a server task
- View server task information in the server task log
- Configure product improvement program
- Replication Type page (Replicate Now wizard)

Global updating

Global updating automates replication to your distributed repositories and keeps your managed systems current. Replication and update tasks are not required. Checking contents into your master repository initiates a global update. The entire process finishes within an hour in most environments. Additionally, you can specify which packages and updates initiate a global update. However, when you only specify that certain content initiates a global update, make sure that you create a replication task to distribute content that was not selected to initiate a global update.

When using global updating, McAfee recommends scheduling a regular pull task (to update the master repository) at a time when network traffic is minimal. Although global updating is much faster than other methods, it increases network traffic during the update.

Global updating process

1. Contents are checked into the master repository.
2. The server performs an incremental replication to all distributed repositories.
3. The server issues a SuperAgent wake-up call to all SuperAgent in the environment.
4. The SuperAgent broadcasts a global update message to all agents within the SuperAgent subnet.
5. Upon receipt of the broadcast, the agent is supplied with a minimum catalog version needed for updating.
The agent searches the distributed repositories for a site that has this minimum catalog version.

Once a suitable repository is found, the agent runs the update task.

If the agent does not receive the broadcast for any reason, such as when the client computer is turned off or there are no SuperAgents, at the next ASCI the minimum catalog version is supplied, which starts the process.

If the agent receives notification from a SuperAgent, the agent is supplied with the list of updated packages. If the agent finds the new catalog version at the next ASCI, it is not supplied with the list of packages to update, and therefore updates all packages available.

Requirements

These requirements must be met to implement global updating:

- A SuperAgent must use the same agent-server secure communication (ASSC) key as the agents that receive its wake-up call.

- A SuperAgent is installed on each broadcast segment. Managed systems cannot receive a SuperAgent wake-up call if there is no SuperAgent on the same broadcast segment. Global updating uses the SuperAgent wake-up call to alert agents that new updates are available.

- Distributed repositories are set up and configured throughout your environment. McAfee recommends SuperAgent repositories, but they are not required. Global updating functions with all types of distributed repositories.

- If using SuperAgent repositories, managed systems must be able to access the repository from which it updates. Although a SuperAgent is required on each broadcast segment for systems to receive the wake-up call, SuperAgent repositories are not required on each broadcast segment.

Deploy update packages automatically with global updating

You can enable global updating on the server to automatically deploy user-specified update packages to managed systems.

Task

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Global Updating, then click Edit at the bottom of the page.

2. On the Edit Global Updating page next to Status, select Enabled.

3. Edit the Randomization interval, if desired.

   Each client update occurs at a randomly selected time within the randomization interval, which helps distribute network load. The default is 20 minutes.

   For example, if you update 1000 clients using the default randomization interval of 20 minutes, roughly 50 clients update each minute during the interval, lowering the load on your network and on your server. Without the randomization, all 1000 clients would try to update simultaneously.

4. Next to Package types, select which packages initiate an update.
Global updating initiates an update only if new packages for the components specified here are checked in to the master repository or moved to another branch. Select these components carefully.

- **Signatures and engines** — Select Host Intrusion Prevention Content, if needed.

Selecting a package type determines what initiates a global update (not what is updated during the global update process). Agents receive a list of updated packages during the global update process. The agents use this list to install only updates that are needed. For example, agents only update packages that have changed since the last update and not all packages if they have not changed.

5 When finished, click **Save**.

Once enabled, global updating initiates an update the next time you check in any of the selected packages or move them to another branch.

- **Be sure to run a Pull Now task and schedule a recurring Repository Pull server task, when you are ready for the automatic updating to begin.**

### Pull tasks

Use pull tasks to update your master repository with DAT and Engine update packages from the source site.

DAT and Engine files must be updated often. McAfee releases new DAT files daily, and Engine files less frequently. Deploy these packages to managed systems as soon as possible to protect them against the latest threats.

You can specify which packages are copied from the source site to the master repository.

- **ExtraDAT files must be checked in to the master repository manually. They are available from the McAfee website.**

A scheduled repository pull server task runs automatically and regularly at the times and days you specify. For example, you can schedule a weekly repository pull task at 5:00 a.m. every Thursday.

You can also use the Pull Now task to check updates in to the master repository immediately. For example, when McAfee alerts you to a fast-spreading virus and releases a new DAT file to protect against it.

If a pull task fails, you must check the packages in to the master repository manually.

Once you have updated your master repository, you can distribute these updates to your systems automatically with global updating or with replication tasks.

### Considerations when scheduling a pull task

Consider these when scheduling pull tasks:

- **Bandwidth and network usage** — If you are using global updating, as recommended, schedule a pull task to run when bandwidth usage by other resources is low. With global updating, the update files are distributed automatically after the pull task finishes.

- **Frequency of the task** — DAT files are released daily, but you might not want to use your resources daily for updating.

- **Replication and update tasks** — Schedule replication tasks and client update tasks to ensure that the update files are distributed throughout your environment.
Replication tasks

Use replication tasks to copy the contents of the master repository to distributed repositories. Unless you have replicated master repository contents to all your distributed repositories, some systems do not receive them. Ensure that all your distributed repositories are up-to-date.

If you are using global updating for all of your updates, replication tasks might not be necessary for your environment, although they are recommended for redundancy. However, if you are not using global updating for any of your updates, you must schedule a Repository Replication server task or run a Replicate Now task.

Scheduling regular Repository Replication server tasks is the best way to ensure that your distributed repositories are up-to-date. Scheduling daily replication tasks ensures that managed systems stay up-to-date. Using Repository Replication tasks automates replication to your distributed repositories.

Occasionally, you might check in files to your master repository that you want to replicate to distributed repositories immediately, rather than wait for the next scheduled replication. Run a Replicate Now task to update your distributed repositories manually.

Full vs. incremental replication

When creating a replication task, select Incremental replication or Full replication. Incremental replication uses less bandwidth and copies only the new updates in the master repository that are not yet in the distributed repository. Full replication copies the entire contents of the master repository.

McAfee recommends scheduling a daily incremental replication task. Schedule a weekly full replication task if it is possible for files to be deleted from the distributed repository outside of the replication functionality of the ePolicy Orchestrator software.

Repository selection

New distributed repositories are added to the repository list file containing all available distributed repositories. The agent of a managed system updates this file each time it communicates with the McAfee ePO server. The agent performs repository selection each time the agent (McAfee Framework Service) service starts, and when the repository list changes.

Selective replication provides more control over the updating of individual repositories. When scheduling replication tasks, you can choose:

- Specific distributed repositories to which the task applies. Replicating to different distributed repositories at different times lessens the impact on bandwidth resources. These repositories can be specified when you create or edit the replication task.
- Specific files and signatures that are replicated to the distributed repositories. Selecting only those types of files that are necessary to each system that checks in to the distributed repository lessens the impact on bandwidth resources. When you define or edit your distributed repositories, you can choose which packages you want to replicate to the distributed repository.

This functionality is intended for updating only products that are installed on several systems in your environment, like Virus Scan Enterprise. The functionality allows you to distribute these updates only to the distributed repositories these systems use.
How agents select repositories

By default, agents can attempt to update from any repository in the repository list file. The agent can use a network ICMP ping or subnet address compare algorithm to find the distributed repository with the quickest response time. Usually, this is the distributed repository closest to the system on the network.

You can also tightly control which distributed repositories agents use for updating by enabling or disabling distributed repositories in the agent policy settings. McAfee does not recommend disabling repositories in the policy settings. Allowing agents to update from any distributed repository ensures that they receive the updates.

Accepted Cron syntax when scheduling a server task

Cron syntax is made up of six or seven fields, separated by a space. Accepted Cron syntax, by field in descending order, is detailed in the following table. Most Cron syntax is acceptable, but a few cases are not supported. For example, you cannot specify both the Day of Week and Day of Month values.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Allowed Values</th>
<th>Allowed Special Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seconds</td>
<td>0–59</td>
<td>, *, /</td>
</tr>
<tr>
<td>Minutes</td>
<td>0–59</td>
<td>, *, /</td>
</tr>
<tr>
<td>Hours</td>
<td>0–23</td>
<td>, *, /</td>
</tr>
<tr>
<td>Day of Month</td>
<td>1–31</td>
<td>, *, ?, / L W C</td>
</tr>
<tr>
<td>Month</td>
<td>1–12, or JAN - DEC</td>
<td>, *, /</td>
</tr>
<tr>
<td>Day of Week</td>
<td>1–7, or SUN - SAT</td>
<td>, *, ?, / L C #</td>
</tr>
<tr>
<td>Year (optional)</td>
<td>Empty, or 1970–2099</td>
<td>, *, /</td>
</tr>
</tbody>
</table>

Notes on allowed special characters

- Commas (,) are allowed to specify more values. For example, "5,10,30" or "MON, WED, FRI".
- Asterisks (*) are used for "every." For example, "*" in the minutes field is "every minute".
- Question marks (?) are allowed to specify no specific value in the Day of Week or Day of Month fields.

The question mark must be used in one of these fields, but cannot be used in both.

- Forward slashes (/) identify increments. For example, "5/15" in the minutes field means the task runs at minutes 5, 20, 35 and 50.
- The letter "L" means "last" in the Day of Week or Day of Month fields. For example, "0 15 10 * 6L" means the last Friday of every month at 10:15 am.
- The letter "W" means "weekday". So, if you created a Day of Month as "15W", this means the weekday closest to the 15th of the month. Also, you can specify "LW", which means the last weekday of the month.
- The pound character "#" identifies the "Nth" day of the month. For example, using "6#3" in the Day of Week field is the third Friday of every month, "2#1" is the first Monday, and "4#5" is the fifth Wednesday.

If the month does not have a fifth Wednesday, the task does not run.
View server task information in the server task log

Examine the server task log for information about your server tasks. The server task log provides the status of the task and any errors that might have occurred.


The following task information is displayed:

- Start date and task duration
- Any errors or warnings and their codes
- Status of each package that is checked in to the master repository
- Information about any new packages that are being checked in to the master repository
- Status of task at each site (when expanded)
- Any errors or warnings, their codes, and the site to which they apply

Configure product improvement program

The McAfee Product Improvement Program helps improve McAfee products. It collects data proactively and periodically from the client systems managed by the ePolicy Orchestrator server.

McAfee Product Improvement Program collects the following types of data:

- System environment (software and hardware details)
- Effectiveness of installed McAfee product features
- McAfee product errors and related Windows events

Task

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Setting, select Product Improvement Program from the Setting Categories, then click Edit.
2. Select Yes to allow McAfee to collect anonymous diagnostic and usage data, then click Save.

Replication Type page (Replicate Now wizard)

Use this page to select whether the replication is incremental or full.

Option definitions

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full</td>
<td>Replicates all packages from the master repository to all selected distributed repositories.</td>
</tr>
<tr>
<td>Incremental</td>
<td>Replicates only the differences between the packages on the master repository and the selected distributed repositories. Does not verify the files on the distributed repositories.</td>
</tr>
</tbody>
</table>
16 Manual package and update management

When you need to roll out new products outside of your normally scheduled tasks, you can check them in manually.

Contents
- Bring products under management
- Check in packages manually
- Delete DAT or engine packages from the master repository
- Manually moving DAT and engine packages between branches
- Check in Engine, DAT, and ExtraDAT update packages manually

Bring products under management
A product's extension must be installed before ePolicy Orchestrator can manage the product.

Before you begin
Make sure that the extension file is in an accessible location on the network.

Task
For option definitions, click ? in the interface.

1 From the ePolicy Orchestrator console, click **Menu | Software | Extensions | Install Extension**.

You can only have one task updating the Master Repository at once. If you try to install an extension at the same time as a Master Repository update is running, the following error appears:

Unable to install extension com.mcafee.core.cdm.CommandException: Cannot check in the selected package while a pull task is running.

Wait until the Master Repository update is done and try to install your extension again.

2 Browse to and select the extension file, then click **OK**.

3 Verify that the product name appears in the **Extensions** list.

Check in packages manually
Check in the deployment packages to the **Master Repository** so that the ePolicy Orchestrator software can deploy them.

For option definitions, click ? in the interface.
Task
1 Open the Check In Package wizard.
   a Click Menu | Software | Master Repository.
   b Click Check In Package.
2 Select the package type, then browse to and select the wanted package file.
3 Click Next.
4 Confirm or configure the following:
   • Package info — Confirm this is the correct package.
   • Branch — Select the wanted branch. If there are requirements in your environment to test new
     packages before deploying them throughout the production environment, McAfee recommends
     using the Evaluation branch whenever checking in packages. Once you finish testing the
     packages, you can move them to the Current branch by clicking Menu | Software | Master Repository.
   • Options — Select whether to:
     • Move the existing package to the Previous branch — When selected, moves packages in the master
       repository from the Current branch to the Previous branch when a newer package of the same
       type is checked in. Available only when you select Current in Branch.
   • Package signing — Specifies if the package is a McAfee or a third-party package.
5 Click Save to begin checking in the package, then wait while the package is checked in.

The new package appears in the Packages in Master Repository list on the Master Repository tab.

Delete DAT or engine packages from the master repository
Delete DAT or engine packages from the master repository. As you check in new update packages
regularly, they replace the older versions or move them to the Previous branch, if you are using the
Previous branch.

Task
For option definitions, click ? in the interface.
1 Click Menu | Software | Master Repository.
   The Packages in Master Repository table appears.
2 In the row of the desired package, click Delete.
   The Delete Package dialog box appears.
3 Click OK.

Manually moving DAT and engine packages between branches
Move packages manually between the Evaluation, Current, and Previous branches after they are
checked in to the master repository.
Task
For option definitions, click ? in the interface.

1 Click Menu | Software | Master Repository.

2 In the row of the desired package, click Change Branch.

3 Select whether to move or copy the package to another branch.

4 Select which branch receives the package.

5 Click OK.

Check in Engine, DAT, and ExtraDAT update packages manually

Check in update packages to the Master Repository to deploy them using the ePolicy Orchestrator software. Some packages can only be checked in manually.

For option definitions, click ? in the interface.

Task
1 Open the Check In Package wizard.

   a Click Menu | Software | Master Repository.

   b Click Check In Package.

2 Select the package type, browse to and select a package file, then click Next.

3 Select a branch:
   • Current — Use the packages without testing them first.
   • Evaluation — Used to test the packages in a lab environment first.

   Once you finish testing the packages, you can move them to the Current branch by clicking Menu | Software | Master Repository.

   • Previous — Use the previous version to receive the package.

4 Next to Options, select Move the existing package to the Previous branch to move the existing package (of the same type that you are checking in) to the Previous branch.

5 Click Save to begin checking in the package. Wait while the package is checked in.

The new package appears in the Packages in Master Repository list on the Master Repository page.
Manual package and update management
Check in Engine, DAT, and ExtraDAT update packages manually
Events and responses

Configure your McAfee ePO server to trigger an action in response to threat, client, or server events.

Contents
- Using automatic responses
- How the Automatic Responses feature interacts with the System Tree
- Response planning
- Configuring responses for the first time
- Determine how events are forwarded
- Configure Automatic Responses
- Determine which events are forwarded to the server
- Choose an ePO Notification Event interval
- Create and edit Automatic Response rules

Using automatic responses

The complete set of event types for which you can configure an automatic response depends on the software products you are managing with your ePolicy Orchestrator server.

By default, your response can include these actions:
- Create issues
- Execute server tasks
- Run external commands
- Run system commands
- Send email messages
- Send SNMP traps

The ability to specify the event categories that generate a notification message and the frequencies with which such messages are sent are highly configurable.

This feature is designed to create user-configured notifications and actions when the conditions of a rule are met. These conditions include, but are not limited to:
- Detection of threats by your anti-virus software product. Although many anti-virus software products are supported, events from VirusScan Enterprise include the IP address of the source attacker so that you can isolate the system infecting the rest of your environment.
- Outbreak situations. For example, 1000 virus-detected events are received within five minutes.
- High-level compliance of ePolicy Orchestrator server events. For example, a repository update or a replication task failed.
How the Automatic Responses feature interacts with the System Tree

Before you plan the implementation Automatic Responses, understand how this feature works with the System Tree.

- This feature does not follow the inheritance model used when enforcing policies.

Automatic Responses use events that occur on systems in your environment that are delivered to the server and configured response rules associated with the group that contains the affected systems and each parent above it. If the conditions of any such rule are met, designated actions are taken, per the rule’s configurations.

This design allows you to configure independent rules at different levels of the System Tree. These rules can have different:

- **Thresholds for sending a notification message.** For example, an administrator of a particular group wants to be notified if viruses are detected on 100 systems within 10 minutes on the group, but an administrator does not want to be notified unless viruses are detected on 1,000 systems within the entire environment in the same amount of time.

- **Recipients for the notification message.** For example, an administrator for a particular group wants to be notified only if a specified number of virus detection events occur within the group. Or, an administrator wants each group administrator to be notified if a specified number of virus detection events occur within the entire System Tree.

- Server events are not filtered by System Tree location.

**Throttling, aggregation, and grouping**

You can configure when notification messages are sent by setting thresholds based on Aggregation, Throttling, or Grouping.

**Aggregation**

Use aggregation to determine the thresholds of events when the rule sends a notification message. For example, configure the same rule to send a notification message when the server receives 1,000 virus detection events from different systems within an hour or whenever it has received 100 virus detection events from any system.

**Throttling**

Once you have configured the rule to notify you of a possible outbreak, use throttling to ensure that you do not receive too many notification messages. If you are administering a large network, you might be receiving tens of thousands of events during an hour, creating thousands of notification messages based on such a rule. Responses allows you to throttle the number of notification messages you receive based on a single rule. For example, you can specify in this same rule that you don’t want to receive more than one notification message in an hour.

**Grouping**

Use grouping to combine multiple aggregated events. For example, events with the same severity can be combined into a single group. Grouping allows an administrator to take actions on all the events with the same and higher severity at once. It also allows you to prioritize the events generated at managed systems or at servers.
Default rules
You can enable the default ePolicy Orchestrator rules for immediate use while you learn more about the feature.

Before enabling any of the default rules:

- Specify the email server (click **Menu | Configuration | Server Settings**) from which the notification messages are sent.

- Ensure the recipient email address is the one you want to receive email messages. This address is configured on the Actions page of the wizard.

Default notification rules

<table>
<thead>
<tr>
<th>Rule Name</th>
<th>Associated Events</th>
<th>Configurations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distributed repository update or replication failed</td>
<td>Distributed repository update or replication failed</td>
<td>Sends a notification message when any update or replication fails.</td>
</tr>
</tbody>
</table>
| Malware detected | Any events from any unknown products | Sends a notification message:  
- When the number of events is at least 1,000 within an hour.  
- At most, once every two hours.  
- With the source system IP address, actual threat names, and actual product information, if available, and many other parameters.  
- When the number of selected distinct value is 500. |
| Master repository update or replication failed | Master repository update or replication failed | Sends a notification message when any update or replication fails. |
| Non-compliant computer detected | Non-Compliant Computer Detected events | Sends a notification message when any events are received from the Generate Compliance Event server task. |

Response planning

Before creating rules that send notifications, save time by planning.

Make sure you have a plan in place for the following items.

- The event type and group (product and server) that trigger notification messages in your environment.

- Who should receive which notification messages. For example, it might not be necessary to notify the administrator of group B about a failed replication in group A, but you might want all administrators to know that an infected file was discovered in group A.

- Which types and levels of thresholds you want to set for each rule. For example, you might not want to receive an email message every time an infected file is detected during an outbreak. Instead, you can choose to have such a message sent at most once every five minutes, regardless of how often that server is receiving the event.

- Which commands or registered executables you want to run when the conditions of a rule are met.

- Which server task you want to run when the conditions of a rule are met.
Configuring responses for the first time

Follow these high-level steps when you are configuring events and automatic responses for the first time.

When creating a new automatic response rule for the first time:

1. Understand Automatic Responses and how it works with the System Tree and your network.
2. Plan your implementation. Which users need to know about which events?
3. Prepare the components and permissions used with Automatic Responses, including:
   - **Automatic Responses permissions** — Create or edit permission sets and ensure that they are assigned to the appropriate McAfee ePO users.
   - **Email server** — Configure the email (SMTP) server at Server Settings.
   - **Email contacts list** — Specify the list from which you select recipients of notification messages at Contacts.
   - **Registered executables** — Specify a list of registered executables to run when the conditions of a rule are met.
   - **Server tasks** — Create server tasks for use as actions to be carried out as a result of a response rule.
   - **SNMP servers** — Specify a list of SNMP servers to use while creating rules. You can configure rules to send SNMP traps to SNMP servers when the conditions are met to initiate a notification message.

Determine how events are forwarded

Use these tasks to determine when events are forwarded and which events are forwarded immediately.

The server receives event notifications from McAfee Agents. You can configure agent policies to forward events either immediately to the server or only at agent-to-server communication intervals.

If you choose to send events immediately (as set by default), the agent forwards all events as soon as they are received.

The default interval for processing event notifications is one minute. As a result, there might be a delay before events are processed. You can change the default interval in the Event Notifications server settings (Menu | Configuration | Server).

If you choose not to have all events sent immediately, the agent forwards immediately only events that are designated by the issuing product as high priority. Other events are sent only at the agent-server communication.

**Tasks**

- **Determine which events are forwarded immediately on page 221**
  Determine whether events are forwarded immediately or only during Agent-Server Communication.
- **Determine which events are forwarded on page 221**
  Use Server Settings to determine which events are forwarded to the server.
Determine which events are forwarded immediately
Determine whether events are forwarded immediately or only during Agent-Server Communication.
If the currently applied policy is not set for immediate uploading of events, either edit the currently applied policy or create a new McAfee Agent policy. This setting is configured on the Threat Event Log page.

For option definitions click ? in the interface.

**Task**
1. Click Menu | Policy | Policy Catalog, then select Product as McAfee Agent and Category as General.
2. Click on an existing agent policy.
3. On the Events tab, select Enable priority event forwarding.
4. Select the event severity.
   Events of the selected severity (and greater) are forwarded immediately to the server.
5. To regulate traffic, type an Interval between uploads (in minutes).
6. To regulate traffic size, type the Maximum number of events per upload.
7. Click Save.

Determine which events are forwarded
Use Server Settings to determine which events are forwarded to the server.
For option definitions click ? in the interface.

**Task**
1. Click Menu | Configuration | Server Settings, select Event Filtering, then click Edit.
2. Select the desired events, then click Save.

These settings take effect once all agents have called in.

---

**Configure Automatic Responses**
Use these tasks to configure the necessary resources to fully leverage Automatic Responses.

**Tasks**
- **Assign permissions to notifications** on page 221
  Notifications permissions enable users to view, create, and edit registered executables.
- **Assign permissions to automatic responses** on page 222
  Responses permissions enable users to create response rules for different event types and groups.
- **Manage SNMP servers** on page 223
  Use these tasks to configure Responses to use your SNMP (Simple Network Management Protocol) server.

**Assign permissions to notifications**
Notifications permissions enable users to view, create, and edit registered executables.
Events and responses
Configure Automatic Responses

Task
For option definitions, click ? in the interface.

1 Click **Menu | User Management | Permission Sets**, then either create a permission set or select an existing one.

2 Next to **Event Notifications**, click **Edit**.

3 Select the wanted notifications permission:
   - No permissions
   - View registered executables
   - Create and edit registered executables
   - View rules and notifications for entire System Tree (overrides System Tree group access permissions)

4 Click **Save**.

5 If you created a permission set, click **Menu | User Management | Users**.

6 Select a user to assign the new permission set to, then click **Edit**.

7 Next to **Permission sets**, select the checkbox for the permission set with the wanted notifications permissions, then click **Save**.

Assign permissions to automatic responses
Responses permissions enable users to create response rules for different event types and groups.

Users need permissions to Threat Event Log, Server Tasks, Detected Systems, and Systems Tree to create a response rule.

Task
For option definitions, click ? in the interface.

1 Click **Menu | User Management | Permission Sets**, then either create a permission set or select an existing one.

2 Next to **Automatic Response**, click **Edit**.

3 Select the wanted Automatic Response permission:
   - No permissions
   - View Responses; view Response results in the Server Task Log
   - Create, edit, view, and cancel Responses; view Response results in the Server Task Log

4 Click **Save**.

5 If you created a permission set, click **Menu | User Management | Users**.

6 Select a user to assign the new permission set to, then click **Edit**.

7 Next to **Permission sets**, select the checkbox for the permission set with the wanted Automatic Response permissions, then click **Save**.
Manage SNMP servers
Use these tasks to configure Responses to use your SNMP (Simple Network Management Protocol) server.

You can configure Responses to send SNMP traps to your SNMP server, which allows you to receive SNMP traps at the same location where you can use your network management application to view detailed information about the systems in your environment.

You do not need to make other configurations or start any services to configure this feature.

Tasks
• Edit SNMP servers on page 223
  You can edit existing SNMP server entries.

• Delete an SNMP server on page 224
  You can delete an SNMP server from Notifications.

• Import .MIB files on page 225
  Use this task when setting up rules to send notification messages to an SNMP server via an SNMP trap.

Edit SNMP servers
You can edit existing SNMP server entries.

For option definitions click ? in the interface.

Task
1. Click Menu | Configuration | Registered Servers.
2. From the list of registered server, select the desired SNMP server, then click Actions | Edit.
3. Edit the following server information as needed, then click Save.
Events and responses
Configure Automatic Responses

<table>
<thead>
<tr>
<th>Option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Type the address of the SNMP server. Valid formats include:</td>
</tr>
<tr>
<td></td>
<td>• DNS Name — Specifies the DNS Name of the server. For example,</td>
</tr>
<tr>
<td></td>
<td>myhost.mycompany.com</td>
</tr>
<tr>
<td></td>
<td>• IPv4 — Specifies the IPv4 address of the server</td>
</tr>
<tr>
<td></td>
<td>xxx.xxx.xxx.xxx/yy</td>
</tr>
<tr>
<td></td>
<td>• IPv6 — Specifies the IPv6 address of the server</td>
</tr>
<tr>
<td></td>
<td>xxxx:xxxx:xxxx:xxxx:xxxx:xxxx/yyy</td>
</tr>
<tr>
<td>Security</td>
<td>Specifies the security details of the SNMP server.</td>
</tr>
<tr>
<td></td>
<td>• Community — Specifies the community name of the SNMP protocol.</td>
</tr>
<tr>
<td></td>
<td>• SNMPv3 Security — Specifies the SNMPv3 security details. This field is</td>
</tr>
<tr>
<td></td>
<td>enabled only if the version of the server is v3.</td>
</tr>
<tr>
<td></td>
<td>• Security Name — Specifies the name of the security settings for the SNMP</td>
</tr>
<tr>
<td></td>
<td>server.</td>
</tr>
<tr>
<td></td>
<td>• Authentication Protocol — Specifies the protocol used by the SNMP server</td>
</tr>
<tr>
<td></td>
<td>for verification of the source.</td>
</tr>
<tr>
<td></td>
<td>• Authentication Passphrase — Specifies the password for protocol</td>
</tr>
<tr>
<td></td>
<td>verification.</td>
</tr>
<tr>
<td></td>
<td>• Confirm Authentication Passphrase — Retype the password for protocol</td>
</tr>
<tr>
<td></td>
<td>verification.</td>
</tr>
<tr>
<td></td>
<td>• Privacy Protocol — Specifies the protocol used by the SNMP server to</td>
</tr>
<tr>
<td></td>
<td>customize the privacy defined by the user.</td>
</tr>
<tr>
<td></td>
<td>• Privacy Passphrase — Specifies the password for privacy protocol settings.</td>
</tr>
<tr>
<td></td>
<td>• Confirm Privacy Passphrase — Retype the password for privacy protocol</td>
</tr>
<tr>
<td></td>
<td>settings.</td>
</tr>
<tr>
<td>SNMP Version</td>
<td>Specifies the SNMP version your server uses.</td>
</tr>
<tr>
<td>Send Test</td>
<td>Tests your configuration.</td>
</tr>
<tr>
<td>Trap</td>
<td></td>
</tr>
</tbody>
</table>

Delete an SNMP server
You can delete an SNMP server from Notifications.
For option definitions click ? in the interface.

Task
1 Click Menu | Configuration | Registered Servers.
2 From the list of registered servers, select the desired SNMP server, then click Actions | Delete.
3 When prompted, click Yes.

The SNMP server is removed from the Registered Servers list.
Import .MIB files

Use this task when setting up rules to send notification messages to an SNMP server via an SNMP trap.

You must import three .mib files from \Program Files\McAfee\ePolicy Orchestrator\MIB. The files must be imported in the following order:

1. NAI-MIB.mib
2. TVD-MIB.mib
3. EPO-MIB.mib

These files allow your network management program to decode the data in the SNMP traps into meaningful text. The EPO-MIB.mib file depends on the other two files to define the following traps:

- **epoThreatEvent** — This trap is sent when an Automatic Response for an McAfee ePO Threat Event is triggered. It contains variables that match properties of the Threat event.
- **epoStatusEvent** — This trap is sent when an Automatic Response for an McAfee ePO Status Event is triggered. It contains variables that match the properties of a (Server) Status event.
- **epoClientStatusEvent** — This trap is sent when an Automatic Response for an McAfee ePO Client Status Event is triggered. It contains variables that match the properties of the Client Status event.
- **epoTestEvent** — This is a test trap that is sent when you click Send Test Trap in the New SNMP Server or Edit SNMP Server pages.

For instructions on importing and implementing .mib files, see the product documentation for your network management program.

---

**Determine which events are forwarded to the server**

You can determine which events are forwarded to the server using server settings and event filtering.

**Before you begin**

These settings impact the bandwidth used in your environment, as well as the results of event-based queries.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Event Filtering, then click Edit at the bottom of the page. The Edit Event Filtering page appears.

2. Select the events you want the agent to forward to the server, then click Save.

Changes to these settings take effect after all agents have communicated with the McAfee ePO server.
Choose an ePO Notification Event interval

This setting determines how often ePO Notification Events are sent to the Automatic Response system. There are three types of ePO Notification Events:

- **Client events** — Events that occur on managed systems. For example, "Product update succeeded."

- **Threat events** — Events that indicate a possible threat is detected. For example, "Virus detected."

- **Server events** — Events that occur on the server. For example, "Repository pull failed."

An automatic response can be triggered only after the Automatic Response system receives a notification. McAfee recommends that you specify a relatively short interval for sending these Notification events. McAfee recommends that you choose an evaluation interval that is frequent enough to ensure that the Automatic Response system can respond to an event in a timely manner, but infrequent enough to avoid excessive bandwidth consumption.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Event Notifications from the Setting Categories, then click Edit.

2. Specify a value between 1 and 9,999 minutes for the Evaluation Interval (1 minute by default), then click Save.

Create and edit Automatic Response rules

Use these tasks to create and edit Automatic Response rules. These tasks allow you to define when and how a response can be taken on the event occurring either at the server or at a managed system.

- **Automatic Response rules do not have a dependency order.**

**Tasks**

- **Describe the rule on page 226**
  
  When creating a new rule, you can add description, specify the language, specify the event type and group that triggers the response, and Enable or disable the rule.

- **Set filters for the rule on page 227**
  
  Set the filters for the response rule on the Filters page of the Response Builder wizard.

- **Set thresholds for the rule on page 227**
  
  You can define when the event triggers the rule on the Aggregation page of the Response Builder wizard.

- **Configure the action for Automatic Response rules on page 228**
  
  You can configure the responses that are triggered by the rule on the Responses page of the Response Builder wizard.

**Describe the rule**

When creating a new rule, you can add description, specify the language, specify the event type and group that triggers the response, and Enable or disable the rule.

For option definitions click ? in the interface.
Task
1 Click **Menu | Automation | Automatic Responses**, then click **Actions | New Response**, or **Edit** next to an existing rule.

2 On the Description page, type a unique name and any notes for the rule.

   Rule names on each server must be unique. For example, if one user creates a rule named Emergency Alert, no other user (including administrators) can create a rule with that name.

3 From the Language menu, select the language the rule uses.

4 Select the **Event group** and **Event type** that trigger this response.

5 Select whether the rule is **Enabled** or **Disabled** next to Status.

6 Click **Next**.

Set filters for the rule
Set the filters for the response rule on the Filters page of the Response Builder wizard. For option definitions click ? in the interface.

Task
1 From the Available Properties list, select the desired property and specify the value to filter the response result.

   Available Properties depend on the event type and event group selected on the Description page of the wizard.

2 Click **Next**.

Set thresholds for the rule
You can define when the event triggers the rule on the Aggregation page of the Response Builder wizard. A rule’s thresholds are a combination of aggregation, throttling, and grouping.

For option definitions click ? in the interface.

Task
1 Next to Aggregation, select whether to **Trigger this response for every event**, or to **Trigger this response if multiple events occur within** a defined amount of time. If you select the latter, define the amount of time in minutes, hours, or days.

2 If you selected **Trigger this response if multiple events occur within**, you can choose to trigger a response when the specified conditions are met. These conditions are any combination of:

   - **When the number of distinct values for an event property is at least a certain value.** This condition is used when a distinct value of occurrence of event property is selected.
   - **When the number of events is at least.** Type a defined number of events.

   You can select one or both options. For example, you can set the rule to trigger this response if the distinct value of occurrence of event property selected exceeds 300, or when the number of events exceeds 3,000, whichever threshold is crossed first.

3 Next to Grouping, select whether to group the aggregated events. If you select to group the aggregated events, specify the property of event on which they are grouped.
4 As needed, next to Throttling, select *At most, trigger this response once every* and define an amount of time that must be passed before this rule can send notification messages again.

The amount of time can be defined in minutes, hours, or days.

5 Click **Next**.

**Configure the action for Automatic Response rules**

You can configure the responses that are triggered by the rule on the Responses page of the Response Builder wizard.

You can configure the rule to trigger multiple actions by using the + and - buttons, located next to the drop-down list for the type of notification.

**Task**

For option definitions, click ? in the interface.

1 If you want the notification message to be sent as an email or text pager message, select **Send Email** from the drop-down list.

a Next to **Recipients**, click ... and select the recipients for the message. This list of available recipients is taken from Contacts (Menu | User Management | Contacts). Alternatively, you can manually type email addresses, separated by a comma.

b Select the importance of the notification email.

c Type the **Subject** of the message. Optionally, you can insert any of the available variables directly into the subject.

d Type any text that you want to appear in the **Body** of the message. Optionally, you can insert any of the available variables directly into the body.

e Click **Next** if finished, or click + to add another notification.

2 If you want the notification message to be sent as an SNMP trap, select **Send SNMP Trap** from the drop-down list.

a Select the wanted SNMP server from the drop-down list.

b Select the type of value that you want to send in the SNMP trap.

- **Value**
- **Number of Distinct Values**
- **List of Distinct Values**
- **List of All Values**

Some events do not include this information. If a selection you made is not represented, the information was not available in the event file.

C Click **Next** if finished, or click + to add another notification.

3 If you want the notification to run an external command, select **Run External Command** from the drop-down list.

a Select the wanted Registered Executables and type any Arguments for the command.

b Click **Next** if finished, or click + to add another notification.
4 If you want the notification to create an issue, select **Create** issue from the drop-down list.
   a Select the type of issue that you want to create.
   b Type a unique name and any notes for the issue. Optionally, you can insert any of the available variables directly into the name and description.
   c Select the **State**, **Priority**, **Severity**, and **Resolution** for the issue from the respective drop-down list.
   d Type the name of the assignee in the text box.
   e Click **Next** if finished, or click + to add another notification.

5 If you want the notification to run a scheduled task, select **Execute Server Task** from the drop-down list.
   a Select the task that you want to run from the **Task to execute** drop-down list.
   b Click **Next** if finished, or click + to add another notification.

6 On the Summary page, verify the information, then click **Save**.

The new response rule appears in the **Responses** list.
Events and responses
Create and edit Automatic Response rules
McAfee Labs provides current information on security threats that could affect your network.

Contents
- Threat information provided by McAfee Labs
- Working with McAfee Labs Security Threats

Threat information provided by McAfee Labs
The McAfee Labs Security Threats page informs you of the top ten medium-to-high-risk threats for corporate users. You no longer need to manually search for this information from the press (TV, radio, newspapers), informational websites, mailing lists, or your peers. You are automatically notified of these threats from McAfee Labs.

Protection status and risk assessment
You can easily determine whether the DAT and engine files in the Current branch of the master repository provide protection against the top 10 threats and, if not, the highest risk level of any new threats.

Protection available
The DAT and engine files in the repository already provide protection against all threats that are known to McAfee Labs. To determine whether each managed system is protected, run a query against DAT and engine file coverage.

Protection pending on Medium-to-Low Risk Threats
The updated DAT file for threats assessed by McAfee Labs as medium risk is pending. However, updated protection is available in a supplemental virus definition (ExtraDAT) file, which you can manually download if you need protection before the next full DAT file is available, such as in an outbreak scenario.

Protection Pending on High-Risk Threats
The updated DAT file for threats assessed by McAfee Labs as high risk is pending. However, updated protection is available in a supplemental virus definition (ExtraDAT) file, which you can manually download if you need protection before the next full DAT file is available, such as in an outbreak scenario.
Working with McAfee Labs Security Threats

Use these tasks to mark threat notifications as read or unread or to delete them. Data is sorted by the date the threat was discovered. In addition, you can click the threat name to go to the McAfee Labs website to view information about each threat.

Each user views a McAfee Labs Security Threats page that is unique to their account. When one user deletes or marks threat notifications as read or unread, these actions are not represented in the table when another user account logs on.

Tasks

- **Configure McAfee Labs Security Threats update frequency on page 232**
  You can configure the update frequency for McAfee Labs Security Threats using Server Settings.

- **View threat notifications on page 232**
  You can view threat notifications, mark them as read or unread, filter threats by their importance, or filter if they've been marked read, or unread.

- **Delete threat notifications on page 233**
  Use this task to delete threat notifications from the McAfee Labs Security Threats page. You cannot delete any threat notifications for which protection is still pending.

**Configure McAfee Labs Security Threats update frequency**

You can configure the update frequency for McAfee Labs Security Threats using Server Settings.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select McAfee Labs Security Threats, then click Edit.

2. In the Updating option, chose one of the following:
   - **Update McAfee Labs Security Threats every** — Select, type a number, and select a unit of time from the list for the updates to occur.
   - **Do not update McAfee Labs Security Threats** — Select to stop updates.

3. Click Save.

**View threat notifications**

You can view threat notifications, mark them as read or unread, filter threats by their importance, or filter if they've been marked read, or unread.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Reporting | McAfee Labs.

2. To narrow the viewable notifications, select an option from the Preset drop-down list.

3. To mark notifications as read or unread, select the desired threats, then click Actions | Mark Read or Mark Unread, as needed. You might need to select Read or Unread from the Filter drop-down list to view the notifications you want to mark.
Delete threat notifications

Use this task to delete threat notifications from the McAfee Labs Security Threats page. You cannot delete any threat notifications for which protection is still pending.

Task
For option definitions, click ? in the interface.

1. Click Menu | Reporting | McAfee Labs.
2. Select threat notifications for which protection is available, then click Actions and select Delete.
Monitoring and reporting on your network security status

Use customizable dashboards to monitor critical security status "at-a-glance," and report that status to stakeholders and decision makers using preconfigured, customizable queries and reports.

Chapter 19  Dashboards
Chapter 20  Queries and reports
Chapter 21  Issues and tickets
Chapter 22  ePolicy Orchestrator log files
Chapter 23  Disaster Recovery
Monitoring and reporting on your network security status
Dashboards

Keeping constant watch on your environment is a difficult task. Dashboards help you do this. Dashboards are collections of monitors. A monitor can be anything from a chart-based query, to a small web application like McAfee Labs Security Threats.

A monitor's behavior and appearance is configured individually.

Users must have the appropriate permissions to use, create, edit, and delete dashboards.

Contents

- Configuring dashboards for the first time
- Work with dashboards
- Work with dashboard monitors
- Default dashboards and their monitors
- Specify default dashboards and dashboard refresh intervals

Configuring dashboards for the first time

The following high-level steps describe the process that occurs when configuring your dashboards for the first time.

1. The ePolicy Orchestrator server has a default dashboard you will see if you have never loaded a dashboard before.

2. Create any needed dashboards and their monitors.

3. The next time ePolicy Orchestrator is started, it will load the last dashboard you used.

Work with dashboards

Dashboards can be created, modified, duplicated, exported and more so you can monitor your environment at a glance.

Use these tasks when working with dashboards.

The default dashboards and predefined queries, shipped with ePolicy Orchestrator, cannot be modified or deleted. To change them, duplicate, rename, and modify the renamed dashboard or query.

Tasks

- Manage dashboards on page 238
  You can create, edit, duplicate, delete, and assign permissions to dashboards.

- Export and import dashboards on page 239
  Once you have fully defined your dashboard and monitors, the fastest way to migrate them to other McAfee ePO servers is to export them and import them onto the other servers.
Manage dashboards
You can create, edit, duplicate, delete, and assign permissions to dashboards.

Before you begin
You must have write permission for a dashboard to modify it.

Task
For option definitions, click ? in the interface.

1 Click Menu | Reporting | Dashboards, to navigate to the Dashboards page.

2 Select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| Create dashboard.          | To create a different view on your environment, create a new dashboard.  
1 Click Dashboard Actions | New.  
The New Dashboard dialog box appears.  
2 Type a Dashboard Name, select a Dashboard Visibility option, and click OK.  
A new blank dashboard is displayed. You can add monitors to the new dashboard as needed. |
| Edit and assign permissions to dashboard. | Dashboards are only visible to users with proper permission. Dashboards are assigned permissions identically to queries or reports. They can either be entirely private, entirely public, or shared with one or more permission sets.  
1 Click Dashboard Actions | Edit.  
The Edit Dashboard dialog box appears.  
2 Select a permission:  
  • Do not share this dashboard  
  • Share this dashboard with everyone  
  • Share this dashboard with the following permission sets  
  With this option, you must also choose one or more permission sets.  
3 Click OK to change the dashboard.  
It is possible to create a dashboard with more expansive permissions than one or more queries contained on the dashboard. If you do this, users that have access to the underlying data will see the query when opening the dashboard. Users that do not have access to the underlying data will receive a message telling them they do not have permission for that query. If the query is private to the dashboard creator, only the dashboard creator can modify the query or remove it from the dashboard. |
### Duplicate dashboard.

Sometimes the easiest way to create a new dashboard is to copy an existing one that's close to what you want.

1. Click **Dashboard Actions | Duplicate**.
   - The Duplicate Dashboard dialog box appears.
2. ePolicy Orchestrator names the duplicate by appending " (copy)" to the existing name. If you want to modify this name, do so now and click **OK**.
   - The duplicated dashboard now opens.

The duplicate is an exact copy of the original dashboard including all permissions. Only the name is changed.

### Delete dashboard.

1. Click **Dashboard Actions | Delete**.
   - The Delete Dashboard dialog box appears.
2. Click **OK** to delete the dashboard.
   - The dashboard is deleted and you see the system default dashboard. Users who had this dashboard as their last viewed dashboard see the system default dashboard when they next log on.

### Export and import dashboards

Once you have fully defined your dashboard and monitors, the fastest way to migrate them to other McAfee ePO servers is to export them and import them onto the other servers.

#### Before you begin

To import a dashboard, you must have access to a previously exported dashboard contained in an XML file.

A dashboard exported as an XML file can be imported to the same or a different system.

#### Task

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Dashboards**.
2. Select one of these actions.
### Work with dashboard monitors

You can customize and manipulate dashboard monitors. Use these tasks when working with dashboard monitors.

#### Tasks

- **Manage dashboard monitors on page 240**
  You can create, add, and remove monitors from dashboards.

- **Move and resize dashboard monitors on page 241**
  Monitors can be moved and resized to efficiently use screen space.

#### Manage dashboard monitors

You can create, add, and remove monitors from dashboards.

**Before you begin**

You must have write permissions for the dashboard you are modifying.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Dashboards**. Select a dashboard from the **Dashboard** drop-down list.
2. Select one of these actions.

---

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export dashboard.</td>
<td>1 Click **Dashboard Actions</td>
</tr>
<tr>
<td></td>
<td>2 Save the exported XML file to an appropriate location.</td>
</tr>
<tr>
<td>Import dashboard.</td>
<td>1 Click **Dashboard Actions</td>
</tr>
<tr>
<td></td>
<td>2 Click <strong>Browse</strong> and select the XML file containing an exported dashboard. Click <strong>Open</strong>.</td>
</tr>
<tr>
<td></td>
<td>3 Click <strong>Save</strong>. The <strong>Import Dashboard</strong> confirmation dialog box appears. The name of the dashboard in the file is displayed, as well as how it will be named in the system. By default, this is the name of the dashboard as exported with (imported) appended.</td>
</tr>
<tr>
<td></td>
<td>4 Click <strong>OK</strong>. If you do not wish to import the dashboard, click <strong>Close</strong>. The imported dashboard is displayed. Regardless of their permissions at the time they were exported, imported dashboards are given private permissions. You must explicitly set their permissions after import.</td>
</tr>
</tbody>
</table>
Add monitor.

1. Click **Add Monitor**.
   - The **Monitor Gallery** appears at the top of the screen.
2. Select a monitor category from the **View** drop-down list.
   - The available monitors in that category appear in the gallery.
3. Drag a monitor onto the dashboard. As you move the cursor around the dashboard, the nearest available drop location is highlighted. Drop the monitor into your desired location.
   - The **New Monitor** dialog appears.
4. Configure the monitor as needed (each monitor has its own set of configuration options), then click **OK**.
5. After you have added monitors to this dashboard, click **Save Changes** to save the newly configured dashboard.
6. When you have completed your changes, click **Close**.

   
   **i**
   If you add a Custom URL Viewer monitor that contains Adobe Flash content or ActiveX controls to a dashboard, it is possible the content might obscure ePolicy Orchestrator menus, making portions of the menu inaccessible.

Edit monitor.

Every monitor type supports different configuration options. For example, a query monitor allows the query, database, and refresh interval to be changed.

1. Choose a monitor to manage, click the arrow in its top-left corner, and select **Edit Monitor**.
   - The monitor’s configuration dialog appears.
2. When you have completed modifying the monitor’s settings, click **OK**. If you decide to not make changes, click **Cancel**.
3. If you decide to keep the resulting changes to the dashboard, click **Save**, otherwise click **Discard**.

Remove monitor.

1. Choose a monitor to remove, click the arrow in its top-left corner, and select **Remove Monitor**.
   - The monitor’s configuration dialog appears.
2. When you are finished modifying the dashboard, click **Save Changes**. To revert the dashboard to its prior state, click **Discard Changes**.

### Move and resize dashboard monitors

Monitors can be moved and resized to efficiently use screen space.

**Before you begin**

You must have write permissions for the dashboard you are modifying.

You can change the size of many dashboard monitors. If the monitor has small diagonal lines in its bottom-right corner, you can resize it. Monitors are moved and resized through drag-and-drop within the current dashboard.
Task
For option definitions, click ? in the interface.

1 Move or resize a monitor:
   • To move a dashboard monitor:
     1 Drag the monitor by its title bar toward its desired location.
        As you move the cursor, the background outline of the monitor shifts to the closest available location for the monitor.
     2 When the background outline has shifted to the location you want, drop the monitor.
        If you attempt to drop the monitor in an invalid location, it returns to its prior location.
   • To resize a dashboard monitor:
     1 Drag the resize icon in the bottom-right corner of the monitor toward an appropriate location.
        As you move the cursor, the background outline of the monitor changes shape to reflect the supported size closest to the current cursor location. Monitors might enforce a minimum or maximum size.
     2 When the background outline has changed shape to a size you want, drop the monitor.
        If you attempt to resize the monitor to a shape not supported in the monitor’s current location, it returns to its prior size.

2 Click Save Changes. To revert to the prior configuration, click Discard Changes.

Default dashboards and their monitors

ePolicy Orchestrator comes with several default dashboards, each of which has its own default monitors.

All dashboards, other than the default (typically McAfee ePO Summary) are owned by the administrator who installed ePolicy Orchestrator. The administrator who performed the installation must change the permissions on additional dashboards before other McAfee ePO users can view them.

Audit dashboard

The Audit dashboard provides an overview of access-related activities occurring on your McAfee ePO server. The monitors included in this dashboard are:

• Failed Login Attempts in Last 30 Days — Displays a list, grouped by user, of all failed logon attempts in the last 30 days.

• Successful Login Attempts in Last 30 Days — Displays a list, grouped by user, of all successful logon attempts in the last 30 days.

• Policy Assignment Change History by User — Displays a report, grouped by user, of all policy assignments in the last 30 days, as recorded in the Audit log.

• Configuration Changes by User — Displays a report, grouped by user, of all actions considered sensitive in the last 30 days, as recorded in the Audit log.

• Server Configuration by User — Displays a report, grouped by user, of all server configuration actions in the last 30 days, as recorded in the Audit log.

• Quick System Search — You can search for systems by system name, IP address, MAC address, user name, or agent GUID.
McAfee ePO Summary dashboard

The McAfee ePO Summary dashboard is a set of monitors providing high-level information and links to more information from McAfee. The monitors included in this dashboard are:

- **McAfee Labs Threat Advisory** — Displays the protection available, any new threats reported, latest DAT and engine available and, if they are in My Repository, a link to the McAfee Labs Security Threats page and the time last checked.

- **Systems per Top-Level Group** — Displays a bar chart of your managed systems, organized by top-level System Tree group.

- **Quick System Search** — You can search for systems by system name, IP address, MAC address, user name, or agent GUID.

- **McAfee Links** — Displays links to McAfee technical support, escalation tools, virus information library, and more.

- **McAfee Agent and VirusScan Enterprise (for Windows) Compliance Summary** — Displays a Boolean pie chart of managed systems in your environment, which are compliant or noncompliant, by version of VirusScan Enterprise (for Windows), McAfee Agent, and DAT files.

- **Malware Detection History** — Displays a line chart of the number of internal virus detections over the past quarter.

Executive dashboard

The Executive dashboard provides a set of monitors providing high-level reports on security threats, with links to more specific product McAfee information. The monitors included in this dashboard are:

- **McAfee Labs Threat Advisory** — Displays the protection available, any new threats reported, latest DAT and Engine available and, if they are in My Repository, a link to the McAfee Labs Security Threats page and the time last checked.

- **Malware Detection History** — Displays a line chart of the number of internal virus detections over the past quarter.

- **Product Deployment in the Last 24 Hours** — Displays a Boolean pie chart of all product deployments in the last 24 hours. Successful deployments are shown in green.

- **Product Updates in the Last 24 Hours** — Displays a Boolean pie chart of all product updates in the last 24 hours. Successful updates are shown in green.

Product Deployment dashboard

The Product Deployment dashboard provides an overview of product deployment and update activities in your network. The monitors included in this dashboard are:

- **Product Deployment in the Last 24 Hours** — Displays a Boolean pie chart of all product deployments in the last 24 hours. Successful deployments are shown in green.

- **Product Updates in the Last 24 Hours** — Displays a Boolean pie chart of all product updates in the last 24 hours. Successful updates are shown in green.

- **Failed Product Deployment in the Last 24 Hours** — Displays a single group bar chart, grouped by product code, of all failed product deployments in the last 24 hours.

- **Quick System Search** — You can search for systems by system name, IP address, MAC address, user name, or agent GUID.
• **Failed Product Updates in the Last 24 Hours** — Displays a single group bar chart, grouped by product code, of all failed product updates in the last 24 hours.

• **Agent Uninstalls Attempted in the Last 7 days** — Displays a single bar chart, grouped by day, of all agent uninstall client events in the last seven days.

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## Specify default dashboards and dashboard refresh intervals

The Dashboards server setting specifies the default dashboard a user sees when logging on to your server, as well as the rate at which all dashboards are refreshed.

You can specify which dashboard a user sees when they log on to your ePolicy Orchestrator server for the first time by mapping it to the user’s permission set. Mapping dashboards to permission sets ensures that users assigned a particular role are automatically presented with the information they need. Users with permission to view dashboards other than their default see the most recent dashboard they viewed each time they go to the Dashboards page.

Using the Dashboards server setting, you can perform the following actions:

• Configure which dashboard is displayed to users who belong to a permission set that does not have a default dashboard assignment.

• Control the automatic refresh rate for dashboards.

Dashboards are refreshed automatically. Each time a refresh occurs, the underlying query is run, and the results displayed in the dashboard. When query results contain large amounts of data, a short refresh interval might impact available bandwidth. McAfee recommends that you choose a refresh interval (5 minutes by default) that is frequent enough to ensure accurate and timely information is displayed without consuming undue network resources.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Configuration | Server Settings**, select **Dashboards** from the **Setting Categories**, then click **Edit**.

2. Select a permission set and default dashboard from the menus.

   Use + and - to add or remove multiple dashboards for each permission set, or to assignments for multiple permission sets.

3. Specify a value between 1 minute and 60 hours for the dashboard monitor refresh interval (5 minutes by default), then click **Save**.
ePolicy Orchestrator comes with its own querying and reporting capabilities. These are highly customizable, flexible, and easy to use.

Included are the Query Builder and Report Builder which create and run queries and reports that result in user-configured data in user-configured charts and tables. The data for these queries and reports can be obtained from any registered internal or external database in your ePolicy Orchestrator system.

In addition to the querying and reporting systems, you can use the following logs to gather information about activities that occur on your McAfee ePO server and throughout your network:

- Audit log
- Server Task log
- Threat Event log

To get you started, McAfee includes a set of default queries that provide the same information as the default reports of previous versions.

Contents

- Query and report permissions
- About queries
- Query Builder
- Configuring queries and reports for the first time
- Work with queries
- Multi-server rollup querying
- About reports
- Structure of a report
- Work with reports
- Using database servers
- Work with database servers

Query and report permissions

You can choose a number of ways to restrict access to queries and reports.

To run a query or report, you need permissions to not only that query or report, but the feature sets associated with their result types. A query’s results pages will only provide access to permitted actions given your permission sets.
Groups and permission sets control access to queries and reports. All queries and reports must belong to a group, and access to that query or report is controlled by the permission level of the group. Query and report groups have one of the following permission levels:

- **Private** — the group is only available to the user that created it.
- **Public** — the group is shared globally.
- **By permission set** — the group is only available to users assigned the selected permission sets.

Permission sets have four levels of access to queries or reports. These permissions include:

- **No permissions** — The Query or Report tab is not available to users with no permissions.
- **Use public queries** — Grants permission to use any queries or reports that have been placed in a Public group.
- **Use public queries; create and edit personal queries** — Grants permission to use any queries or reports that have been placed in a Public group, as well as the ability to use the Query Builder to create and edit queries or reports in Private groups.
- **Edit public queries; create and edit personal queries; make personal queries public** — Grants permission to use and edit any queries or reports placed in Public groups, create and edit queries or reports in Private groups, as well as the ability to move queries or reports from Private groups to Public or Shared groups.

### About queries

Queries are essentially questions you ask ePolicy Orchestrator and answers are returned in various forms of charts and tables.

A query can be used individually to get an answer right now. Any query’s results can be exported to various formats, any of which can be downloaded or sent as an attachment to an email message. Most queries can also be used as dashboard monitors, enabling near real-time system monitoring. Queries can also be combined into reports, giving a more broad and systematic look at your ePolicy Orchestrator software system.

The default dashboards and predefined queries, shipped with ePolicy Orchestrator, cannot be modified or deleted. To change them, duplicate, rename, and modify the renamed dashboard or query.

### Query results are actionable

Query results are now actionable. Query results displayed in tables (and drill-down tables) have various actions available for selected items in the table. For example, you can deploy agents to systems in a table of query results. Actions are available at the bottom of the results page.

### Queries as dashboard monitors

Most queries can be used as a dashboard monitor (except those using a table to display the initial results). Dashboard monitors are refreshed automatically on a user-configured interval (five minutes by default).

### Exported results

Query results can be exported to four different formats. Exported results are historical data and are not refreshed like other monitors when used as dashboard monitors. Like query results and query-based monitors displayed in the console, you can drill down into the HTML exports for more detailed information.

Unlike query results in the console, data in exported reports is not actionable.
Reports are available in several formats:

- CSV — Use the data in a spreadsheet application (for example, Microsoft Excel).
- XML — Transform the data for other purposes.
- HTML — View the exported results as a webpage.
- PDF — Print the results.

**Combining queries in reports**

Reports can contain any number of queries, images, static text, and other items. They can be run on demand or on a regular schedule, and produce PDF output for viewing outside ePolicy Orchestrator.

**Sharing queries between servers**

Any query can be imported and exported, allowing you to share queries between servers. In a multi-server environment, any query needs to be created only once.

**Retrieving data from different sources**

Queries can retrieve data from any registered server, including databases external to ePolicy Orchestrator.

---

**Query Builder**

ePolicy Orchestrator provides an easy, four-step wizard that is used to create and edit custom queries. With the wizard you can configure which data is retrieved and displayed, and how it is displayed.

**Result types**

The first selections you make in the Query Builder wizard are the Schema and result type from a feature group. This selection identifies from where and what type of data the query retrieves, and determines the available selections in the rest of the wizard.

**Chart types**

ePolicy Orchestrator provides a number of charts and tables to display the data it retrieves. These and their drill-down tables are highly configurable.

![Tables do not include drill-down tables.](image)

Chart types include:

**Table 20-1 Chart Type Groups**

<table>
<thead>
<tr>
<th>Type</th>
<th>Chart or Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar</td>
<td>• Bar Chart</td>
</tr>
<tr>
<td></td>
<td>• Grouped Bar Chart</td>
</tr>
<tr>
<td></td>
<td>• Stacked Bar Chart</td>
</tr>
<tr>
<td>Pie</td>
<td>• Boolean Pie Chart</td>
</tr>
<tr>
<td></td>
<td>• Pie Chart</td>
</tr>
</tbody>
</table>
Table 20-1  Chart Type Groups (continued)

<table>
<thead>
<tr>
<th>Type</th>
<th>Chart or Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bubble</td>
<td>• Bubble Chart</td>
</tr>
<tr>
<td>Summary</td>
<td>• Multi-group Summary Table</td>
</tr>
<tr>
<td></td>
<td>• Single Group Summary Table</td>
</tr>
<tr>
<td>Line</td>
<td>• Multi-line Chart</td>
</tr>
<tr>
<td></td>
<td>• Single Line Chart</td>
</tr>
<tr>
<td>List</td>
<td>• Table</td>
</tr>
</tbody>
</table>

Table columns

Specify columns for the table. If you select Table as the primary display of the data, this configures that table. If you select a type of chart as the primary display of data, this configures the drill-down table.

Query results displayed in a table are actionable. For example, if the table is populated with systems, you can deploy or wake up agents on those systems directly from the table.

Filters

Specify criteria by selecting properties and operators to limit the data retrieved by the query.

Configuring queries and reports for the first time

Follow these high-level steps when configuring queries and reports for the first time.

1. Understand the functionality of queries, reports, and the Query Builder.
2. Review the default queries and reports, and edit any to your needs.
3. Create queries and reports for any needs that aren’t met by the default queries.

Work with queries

Queries can be created, run, exported, duplicated, and more depending on your needs.
Tasks

- **Manage custom queries on page 249**
  You can create, duplicate, edit, and delete queries as needed.

- **Run an existing query on page 251**
  You can run saved queries on-demand.

- **Run a query on a schedule on page 251**
  A server task is used to run a query on a regular basis.

- **Create a query group on page 252**
  Query groups allow you to save queries or reports without allowing other users access to them.

- **Move a query to a different group on page 252**
  You can change the permissions on a query by moving it to a different group.

- **Export and import queries on page 252**
  Queries can be exported and imported to ensure different ePolicy Orchestrator servers are retrieving data in identical ways.

- **Export query results to other formats on page 253**
  Query results can be exported to a variety of formats including HTML, PDF, CSV, and XML.

Manage custom queries
You can create, duplicate, edit, and delete queries as needed.

Task
For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports** and the **Queries & Reports** page appears.
2. Select one of these actions.
### Create custom query.

1. Click **Actions** | **New** and the Query Builder page appears.
2. On the **Result Type** page, select the **Feature Group** and **Result Type** for this query, then click **Next**.
3. Select the type of chart or table to display the primary results of the query, then click **Next**.
   - **Info**: If you select **Boolean Pie Chart**, you must configure the criteria to include in the query before proceeding.
4. Select the columns to be included in the query, then click **Next**.
   - **Info**: If you selected **Table** on the Chart page, the columns you select here are the columns of that table. Otherwise, these are the columns that make up the query details table.
5. Select properties to narrow the search results, then click **Run**. The **Unsaved Query** page displays the results of the query, which is actionable, so you can take any available actions on items in any tables or drill-down tables.
   - **Info**: Selected properties appear in the content pane with operators that can specify criteria used to narrow the data that is returned for that property.
   - If the query didn't appear to return the expected results, click **Edit Query** to go back to the **Query Builder** and edit the details of this query.
   - If you don't need to save the query, click **Close**.
   - If this is a query you want to use again, click **Save** and continue to the next step.
6. The **Save Query** page appears. Type a name for the query, add any notes, and select one of the following:
   - **New Group** — Type the new group name and select either:
     - Private group (My Groups)
     - Public group (Shared Groups)
   - **Existing Group** — Select the group from the list of **Shared Groups**.
7. Click **Save**.
   - The new query appears in the **Queries** list.

### Duplicate query.

1. From the list, select a query to duplicate and click **Actions** | **Duplicate**.
2. In the **Duplicate** dialog box, type a name for the duplicate and select a group to receive a copy of the query, then click **OK**.
   - The duplicated query appears in the **Queries** list.
### Edit query.

1. From the list, select a query to edit and click **Actions | Edit**.
   - *Query Builder* page appears starting on the *Chart Type* page.
2. Edit the query settings and click **Save** when done.
   - The query with your changes appears in the *Queries* list.

### Delete query.

1. From the list, select a query to delete and click **Actions | Delete**.
2. When the confirmation dialog box appears, click **Yes**.
   - The query no longer appears in the *Queries* list. If any reports or server tasks used the query, they now appear as invalid until you remove the reference to the deleted query.

---

### Run an existing query

You can run saved queries on-demand.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select a query from the *Queries* list.
2. Click **Actions | Run**. The query results appear. Drill down into the report and take actions on items as necessary.
   - Available actions depend on the permissions of the user.
3. Click **Close** when finished.

### Run a query on a schedule

A server task is used to run a query on a regular basis.

For option definitions, click ? in the interface.

**Task**

1. Click **Menu | Automation | Server Tasks**, then click **Actions | New Task**.
2. On the *Description* page, name and describe the task, then click **Next**.
3. From the *Actions* drop-down menu, select **Run Query**.
4. In the *Query* field, browse to the query you want to run.
5. Select the language in which to display the results.
6. From the *Sub-Actions* list, select an action to take based on the results. Available actions depend on the permissions of the user, and the products managed by your ePolicy Orchestrator server.
   - You are not limited to selecting one action for the query results. Click the + button to add additional actions to take on the query results. Be careful to place the actions in the order you want them to be taken on the query results.
7. Click **Next**.
8. Schedule the task as desired, then click **Next**.
9. Verify the configuration of the task, then click **Save**.
The task is added to the list on the Server Tasks page. If the task is enabled (which it is by default), it runs at the next scheduled time. If the task is disabled, it only runs by clicking Run next to the task on the Server Tasks page.

Create a query group

Query groups allow you to save queries or reports without allowing other users access to them. Creating a group allows you to categorize queries and reports by functionality as well as controlling access. The list of groups you see within the ePolicy Orchestrator software is the combination of groups you have created and groups you have permission to see.

You can also create private query groups while saving a custom query.

Task

For option definitions, click ? in the interface.

1 Click Menu | Reporting | Queries & Reports, then click Group Actions | New Group.

2 In the New Group page, type a group name.

3 From Group Visibility, select one of the following:
   • Private group — Adds the new group under My Groups.
   • Public group — Adds the new group under Shared Groups. Queries and reports in the group can be seen by any user with access to public queries and reports.
   • Shared by permission set — Adds the new group under Shared Groups. Only users assigned the selected permission sets will be able to access reports or queries in this group.

   Administrators have full access to all By permission set and Public queries.

4 Click Save.

Move a query to a different group

You can change the permissions on a query by moving it to a different group.

Task

For option definitions, click ? in the interface.

1 Click Menu | Reporting | Queries & Reports. In the Queries list, select the query you want to move.

2 Click Actions and select one of the following:
   • Move to Different Group — Select the desired group from the Select target group menu.
   • Duplicate — Specify a new name and select the desired group from the Group to receive copy menu.

3 Click OK.

Export and import queries

Queries can be exported and imported to ensure different ePolicy Orchestrator servers are retrieving data in identical ways.
**Task**
For option definitions, click ? in the interface.

1. Open the Queries page by selecting **Menu** | **Reporting** | **Queries & Reports**, then select the **Query** tab.

2. Select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export query</td>
<td>1. Select the group that contains the query you want to export from the <strong>Groups</strong> list, then select the query you want to export.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Actions</strong></td>
</tr>
<tr>
<td></td>
<td>The McAfee ePO server sends an XML file to your browser. What happens next depends on your browser settings. By default, most browsers ask you to save the file.</td>
</tr>
<tr>
<td></td>
<td>The exported XML file contains a complete description of all settings required to replicate the exported query.</td>
</tr>
<tr>
<td>Import query</td>
<td>1. Click <strong>Actions</strong></td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Browse</strong> to navigate to and select the XML file containing the dashboard you want to import.</td>
</tr>
<tr>
<td></td>
<td>3. Select a new or existing group for the query. If a new group, give the name of the group and select whether it is private or public.</td>
</tr>
<tr>
<td></td>
<td>If an existing group, select the group the imported query will join.</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>Save</strong>.</td>
</tr>
<tr>
<td></td>
<td>A confirmation screen appears displaying the information about the query as it exists in the XML file and how it will be named after import. If there is no valid query in the selected file, an error message is displayed.</td>
</tr>
<tr>
<td></td>
<td>5. Click <strong>OK</strong> to finalize the import.</td>
</tr>
<tr>
<td></td>
<td>The newly imported query acquires the permissions of the group where it was imported.</td>
</tr>
</tbody>
</table>

**Export query results to other formats**

Query results can be exported to a variety of formats including HTML, PDF, CSV, and XML. Exporting query results differs from creating a report in a couple ways. First, there is no additional information added to the output as you can do within a report; only the resulting data is included. Also, more formats are supported. It is expected that exported query results could be used in further processing, so machine-friendly formats such as XML and CSV are supported. Reports are designed to be human readable, and as such are only output as PDF files.

Unlike query results in the console, exported data is not actionable.

**Task**
For option definitions, click ? in the interface.

1. Click **Menu** | **Reporting** | **Queries & Reports** then select one or more queries.

   You can also, run the query from the Queries page and click **Options** | **Export Data** from the query results page to access the Export page.

2. Click **Actions** | **Export Data**.

   The Export page appears.
3 Select what to export. For chart-based queries, select either Chart data only or Chart data and drill-down tables.

4 Select whether the data files are exported individually or in a single archive (zip) file.

5 Select the format of the exported file.
   - CSV — Use this format to use the data in a spreadsheet application (for example, Microsoft Excel).
   - XML — Use this format to transform the data for other purposes.
   - HTML — Use this report format to view the exported results as a web page.
   - PDF — Use this report format when you need to print the results.

6 If exporting to a PDF file, configure the following:
   - Select the Page size and Page orientation.
   - (Optional) Show filter criteria.
   - (Optional) Include a cover page with these text and include the needed text.

7 Select whether the files are emailed as attachments to selected recipients, or they are saved to a location on the server to which a link is provided. You can open or save the file to another location by right-clicking it.

   When typing multiple email addresses for recipients, you must separate entries with a comma or semicolon.

8 Click Export.

The files are created and either emailed as attachments to the recipients, or you are taken to a page where you can access the files from links.

Multi-server rollup querying

ePolicy Orchestrator includes the ability to run queries that report on summary data from multiple databases.

Use these result types in the Query Builder wizard for this type of querying:

- Rolled-Up Threat Events
- Rolled-Up Managed Systems
- Rolled-Up Client Events
- Rolled-Up Applied Policies
- Rolled-Up Compliance History

Action commands cannot be generated from rollup result types.

How it works

To roll up data for use by rollup queries, you must register each server (including the local server) that you want to include in the query.
Once the servers are registered, you must configure Roll Up Data server tasks on the reporting server (the server that performs the multi-server reporting). Roll Up Data server tasks retrieve the information from all databases involved in the reporting, and populate the EPORollup_ tables on the reporting server. The rollup queries target these database tables on the reporting server.

As a prerequisite to running a Rolled-Up Compliance History query, you must take two preparatory actions on each server whose data you want to include:

- Creating a query to define compliance
- Generating a compliance event

Create a Rollup Data server task

Rollup Data server tasks draw data from multiple servers simultaneously.

Before you begin

You must first register each ePolicy Orchestrator reporting server you want to include in rollup reporting. Registering each servers is required to collect summary data from those servers to populate the EPORollup_ tables of the rollup reporting server.

The reporting server must also be registered if its summary data is to be included in rollup reporting.

Task

For option definitions, click ? in the interface.

1. Click Menu | Automation | Server Tasks, then click Actions | New Task.
2. On the Description page, type a name and description for the task, and select whether to enable it, then click Next.
3. Click Actions and select Roll Up Data.
4. From the Roll up data from: drop-down menu, select All registered servers or Select registered servers.
5. If you chose Select registered servers in the prior step, click Select and choose the servers from which you want data in the Select Registered Servers dialog box. Click OK.
6. Select the data type to be rolled up. To select multiple data types, click the + at the end of the table heading.

The data types Threat Events, Client Events, and Applied Policies can be further configured to include the additional properties Purge, Filter and Rollup Method. To do so, click Configure in the row that describes the additional properties available.

7. Click Next.

The Schedule page appears.

8. Schedule the task, then click Next.

The Summary page appears.

If you are reporting on rolled-up compliance history data, ensure that the time unit of the Rolled-Up Compliance History query matches the schedule type of the Generate Compliance Event server tasks on the registered servers.

9. Review the settings, then click Save.
**Create a query to define compliance**

Compliance queries are required on McAfee ePO servers whose data is used in rollup queries.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then click **Actions | New**.
2. On the **Result Type** page, select **System Management** as Feature Group, and select **Managed Systems** as Result Types, then click **Next**.
3. Select **Boolean Pie Chart** from the Display Result As list, then click **Configure Criteria**.
4. Select the properties to include in the query, then set the operators and values for each property. Click **OK**. When the Chart page appears, click **Next**.

   > These properties define what is compliant for systems managed by this McAfee ePO server.

5. Select the columns to be included in the query, then click **Next**.
6. Select any filters to be applied to the query, click **Run**, then click **Save**.

**Generate compliance events**

Compliance events are used in rollup queries to aggregate data in a single report.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Automation | Server Tasks**, then click **Actions | New Task**.
2. On the Description page, type a name for the new task, then click **Next**.
3. From the **Actions** drop-down menu, select **Run Query**.
4. Click browse (…) next to the **Query** field and select a query. The **Select a query from the list** dialog box appears with the **My Groups** tab active.
5. Select the compliance-defining query. This could be a default query, such as **McAfee Agent Compliance Summary** in the McAfee Groups section, or a user-created query, such as one described in **Creating a query to define compliance**.
6. From the **Sub-Actions** drop-down menu, select **Generate Compliance Event** and specify the percentage or number of target systems, then click **Next**.

   > Events can be generated by the **generate compliance event** task if noncompliance rises above a set percentage or set number of systems.

7. Schedule the task for the time interval needed for Compliance History reporting. For example, if compliance must be collected on a weekly basis, schedule the task to run weekly. Click **Next**.
8. Review the details, then click **Save**.
**About reports**

Reports combine queries and other elements into PDF documents, providing detailed information for analysis.

You run reports to find out the state of your environment — vulnerabilities, use, and events, for example — so you can make the changes necessary to keep your environment secure.

Queries provide similar information, but can only be used when you are directly interacting with an ePolicy Orchestrator server. Reports allow you to package together one or more queries into a single PDF document, enabling focused, offline analysis.

Reports are configurable documents that display data from one or more queries, drawing data from one or more databases. The most recently run result for every report is stored within the system and is readily available for viewing.

You can restrict access to reports by using groups and permission sets in the same manner you restrict access to queries. Reports and queries can use the same groups, and because reports primarily consist of queries, this allows for consistent access control.

**Structure of a report**

Reports contain a number of elements held within a basic format.

While reports are highly customizable, they have a basic structure that contains all of the varying elements.

**Page size and orientation**

ePolicy Orchestrator currently supports six combinations of page size and orientation. These include:

- **Page sizes:**
  - US Letter (8.5" x 11")
  - US Legal (8.5" x 14")
  - A4 (210mm x 297mm)

- **Orientation:**
  - Landscape
  - Portrait

**Headers and footers**

Headers and footers also have the option of using a system default, or can be customized in a number of ways, including logos. Elements currently supported for headers and footers are:

- **Logo**
- **Date/Time**
- **Page Number**
- **User Name**
- **Custom text**
Page elements

Page elements provide the content of the report. They can be combined in any order, and may be duplicated as needed. Page elements provided with ePolicy Orchestrator are:

- Images
- Static text
- Page breaks
- Query Tables
- Query Charts

Work with reports

You can create, edit, and manage reports that combine queries and other elements into detailed PDF documents. These documents can provide a large amount of useful data, but there are some tasks to complete to create a collection of reports that are useful to you.

Tasks

- **Create a new report on page 258**
  You can create new reports and store them in ePolicy Orchestrator.

- **Edit an existing report on page 259**
  You can modify an existing report's contents or the order of presentation.

- **View report output on page 263**
  You can view the last run version of every report.

- **Group reports together on page 264**
  Every report must be assigned to a group.

- **Run reports on page 264**
  Reports must be run before examining their results.

- **Run a report with a server task on page 265**
  Reports can be run automatically using server tasks.

- **Export and import reports on page 265**
  Reports can contain highly structured information, so exporting and importing them from one server to another makes data retrieval and reporting consistent across all ePolicy Orchestrator servers.

- **Configure the template and location for exported reports on page 266**
  You can define the appearance and storage location for tables and dashboards you export as documents.

- **Delete reports on page 267**
  You can delete reports that are no longer being used.

- **Configure Internet Explorer 8 to automatically accept McAfee ePO downloads on page 267**
  As a security measure, Microsoft Internet Explorer might block ePolicy Orchestrator downloads from occurring automatically. This behavior can be changed with an Internet Explorer configuration change.

Create a new report

You can create new reports and store them in ePolicy Orchestrator.
**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.
2. Click **Actions | New**.

A blank **Report Layout** page appears.

3. Click **Name, Description and Group**. Name the report as desired, optionally give it a description, and select an appropriate group for it. Click **OK**.

4. You can now add, remove, rearrange elements, customize the header and footer, and change the page layout. At any point, you can check your progress by clicking **Run** to run the report.

5. When you are finished, click **Save**.

**Edit an existing report**

You can modify an existing report's contents or the order of presentation.

If you are creating a new report, you will arrive at this screen after clicking **New Report**.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.
2. Select a report from the list by selecting the checkbox next to its name.
3. Click **Edit**.

The **Report Layout** page appears.

Any of the following tasks can now be performed on the report.

**Tasks**

- **Add elements to a report** on page 260
  You can add new elements to an existing report.

- **Configure image report elements** on page 260
  You can upload new images and modify the images used within a report.

- **Configure text report elements** on page 260
  You can insert static text within a report to explain its contents.

- **Configure query table report elements** on page 261
  Some queries are better displayed as a table when inside a report.

- **Configure query chart report elements** on page 261
  Some queries are better displayed as a chart when inside a report.

- **Customize report headers and footers** on page 262
  Headers and footers provide information about the report.

- **Remove elements from a report** on page 263
  You can remove elements from a report if no longer needed.

- **Reorder elements within a report** on page 263
  You can change the order in which elements appear within a report.
Add elements to a report
You can add new elements to an existing report.

Before you begin
You must have a report open in the Report Layout page to perform this task.

Task
For option definitions, click ? in the interface.

1 Select an element from the Toolbox and drag it over the Report Layout.
2 When the element is over your wanted location, drop it.

Report elements other than Page Break require configuration. The configuration page for the element appears.
3 After configuring the element, click OK.

Configure image report elements
You can upload new images and modify the images used within a report.

Before you begin
You must have a report open in the Report Layout page.

Task
For option definitions, click ? in the interface.

1 To configure an image already in a report, click the arrow at the top left corner of the image. Click Configure.

This displays the Configure Image page. If you are adding an image to the report, the Configure Image page appears immediately after you drop the Image element onto the report.
2 If you want to use an existing image, select it from the gallery.
3 If you want to use a new image, click Browse and select the image from your computer. Click OK.
4 If you want to specify a specific image width, enter it in the Image Width field.

By default, the image is displayed in its existing width without resizing unless that width is wider than the available width on the page. In that case, it is resized to the available width keeping aspect ratio intact.
5 Select if you want the image aligned left, center, or right.
6 Click OK.

Configure text report elements
You can insert static text within a report to explain its contents.

Before you begin
You must have a report open in the Report Layout page.
Task
For option definitions, click ? in the interface.

1. To configure text already in a report, click the arrow at the top left corner of the text element. Click Configure.
   This displays the Configure Text page. If you are adding new text to the report, the Configure Text page appears immediately after you drop the Text element onto the report.

2. Edit the existing text in the Text edit box, or add new text.

3. Change the font size as appropriate.
   The default is 12 pt type.

4. Select the text alignment: left, center, or right.

5. Click OK.
   The text you entered appears in the text element within the report layout.

Configure query table report elements
Some queries are better displayed as a table when inside a report.

Before you begin
You must have a report open in the Report Layout page.

Task
For option definitions, click ? in the interface.

1. To configure a table already in a report, click the arrow at the top left corner of the table. Click Configure.
   This displays the Configure Query Table page. If you are adding query table to the report, the Configure Query Table page appears immediately after you drop the Query Table element onto the report.

2. Select a query from the Query drop-down list.

3. Select the database from the Database drop-down list to run the query against.

4. Choose the font size used to display the table data.
   The default is 8pt type.

5. Click OK.

Configure query chart report elements
Some queries are better displayed as a chart when inside a report.

Before you begin
You must have a report open in the Report Layout page.
Task
For option definitions, click ? in the interface.

1. To configure a chart already in a report, click the arrow at the top left corner of the chart. Click Configure.
   This displays the Configure Query Chart page. If you are adding a query chart to the report, the Configure Query Chart page appears immediately after you drop the Query Table element onto the report.

2. Select a query from the Query drop-down list.

3. Select whether to display only the chart, only the legend, or a combination of the two.

4. If you have chosen to display both the chart and legend, select how the chart and legend are placed relative to each other.

5. Select the font size used to display the legend.
   The default is 8 pt type.

6. Select the chart image height in pixels.
   The default is one-third the page height.

7. Click OK.

Customize report headers and footers
Headers and footers provide information about the report.
There are six fixed locations within the header and footer that can contain different data fields. Three are in the header, three in the footer.
The header contains a left-aligned logo and two right-aligned fields, one above the other. These fields can contain one of four values:

- Nothing
- Date/Time
- Page Number
- User name of the user running the report

The footer contains three fields. One left-aligned, one centered, and one right-aligned. These three fields can also contain the same values listed above as well as custom text.

Task
For option definitions, click ? in the interface.

1. Click Menu | Reporting | Queries. Select the Report tab.

2. Select a report and click Actions | Edit.

3. Click Header and Footer.

4. By default, reports use the system setting for headers and footers. If you do not want this, deselect Use Default Server Setting.
   To change the system settings for headers and footers, click Menu | Configuration | Server Settings, then select Printing and Exporting and click Edit.
5 To change the logo, click **Edit Logo**.
   a If you want the logo to be text, select **Text** and enter the text in the edit box.
   b To upload a new logo, select **Image** then browse to and select the image on your computer and click **OK**.
   c To use a previously-uploaded logo, select it.
   d Click **Save**.

6 Change the header and footer fields to match the desired data, then click **OK**.

7 Click **Save** to save changes to the report.

**Remove elements from a report**
You can remove elements from a report if no longer needed.

**Task**
For option definitions, click ? in the interface.

1 Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2 Select a report and click **Actions | Edit**.

3 Click the arrow in the top left corner of the element you want to delete, then click **Remove**.
   The element is removed from the report.

4 To save changes to the report, click **Save**.

**Reorder elements within a report**
You can change the order in which elements appear within a report.

**Task**
For option definitions, click ? in the interface.

1 Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2 Select a report from the list, then click **Actions | Edit**.

3 To move an element, click the title bar of the element and drag it to a new position.
   The element positioning under the dragged element will shift as you move the cursor around the report. Red bars appears on either side of the report if the cursor is over an illegal position.

4 When the element is positioned where you want it, drop the element.

5 Click **Save** to save the changes to the report.

**View report output**
You can view the last run version of every report.
Every time a report is run, the results are stored on the server and displayed in the report list.

> Whenever a report is run, the prior results are erased and cannot be retrieved. If you are interested in comparing different runs of the same report, it is recommended you archive the output elsewhere.
**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2. In the report list, you will see a **Last Run Result** column. Each entry in this column is a link to retrieve the PDF that resulted from the last successful run of that report. Click a link from this column to retrieve a report.
   
   This will attempt to open a PDF within your browser, and your browser will behave as you have configured it for that file type.

**Group reports together**

Every report must be assigned to a group.

Reports are assigned to a group when initially created, but this assignment can be changed later. The most common reasons for grouping reports together are to collect similar reports together, or to manage permissions to certain reports.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2. Select a report and click **Actions | Edit**.

3. Click **Name, Description and Group**.

4. Select a group from the **Report Group** drop-down list and click **OK**.

5. Click **Save** to save any changes to the report.

When you select the chosen group from the **Groups** list in the left pane of the report window, the report now appears in the report list.

**Run reports**

Reports must be run before examining their results.

Reports can be run in three different locations within ePolicy Orchestrator:

- The report listing
- Within a server task
- The Report Layout page while creating a new, or editing an existing report.

This topics explains running reports from within the report listing.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2. Select a report from the report list, then click **Actions | Run**.

   When the report is complete, the resulting PDF is sent to your browser. It is displayed or downloaded according to your browser settings.

Some reports take a while to complete. It is possible to have more than one report running simultaneously, but you cannot initiate more than one report at a time through the interface.
the report is complete, the Last Run Result column in the report list is updated with a link to the PDF containing those results.

Run a report with a server task
Reports can be run automatically using server tasks.
If you want a report to be run without manual intervention, a server task is the best approach. This task creates a new server task allowing for automatic, scheduled runs of a given report.

Task
For option definitions, click ? in the interface.

1 Click Menu | Automation | Server Tasks, then click Actions | New Task.

2 Give the task an appropriate Name, optional Notes, and whether the task has a Schedule status. Click Next.
If you want the task to be run automatically, set Schedule status to Enabled.

3 In the Actions drop-down list, choose Run Report. Select the report to run and the target language. Click Next.

4 Choose the Schedule type (the frequency), Start date, End date, and Schedule time to run the report. Click Next.
The schedule information will only be used if you enable Schedule status.

5 Click Save to save the server task.
The new task now appears in the Server Tasks list.

Export and import reports
Reports can contain highly structured information, so exporting and importing them from one server to another makes data retrieval and reporting consistent across all ePolicy Orchestrator servers.

Task
For option definitions, click ? in the interface.

1 Open the Queries page by selecting Menu | Reporting | Queries & Reports, then select the Report tab.

2 Select one of these actions.
### Export a report.

1. Select the group that contains the report(s) you want to export from the Groups list.
2. Select the report(s) you want to export, then click Actions | Export.

   The McAfee ePO server sends an XML file to your browser. What happens depends on your browser settings. By default, most browsers will ask you to save the file.

   The exported report contains the definitions of all items contained within the report. This includes external database definitions, queries, graphics, and others.

### Import a report.

1. From the Report page, click Actions | Import.
2. Click Browse to navigate to and select the XML file containing the report you want to import.
3. Select a new or existing group for the report. If a new group, give the name of the group and select whether it is private or public. If an existing group, select the group the imported report will join.
4. Click OK.
5. Click Import to finalize the import.

   Newly imported reports acquire the permissions of the group they were imported into.

---

## Configure the template and location for exported reports

You can define the appearance and storage location for tables and dashboards you export as documents.

Using the Printing and Exporting server setting, you can configure:

- Headers and footers, including a custom logo, name, page numbering, and so on.
- Page size and orientation for printing.
- Directory where exported tables and dashboards are stored.

### Task

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, then select Printing and Exporting in the Settings list.
2. Click Edit. The Edit Printing and Exporting page appears.
3. In the Headers and footers for exported documents section, click Edit Logo to open the Edit Logo page.
   a. Select Text and type the text you want included in the document header, or do one of the following:
      i. Select Image and browse to the image file, such as your company logo.
      ii. Select the default McAfee logo.
   b. Click OK to return to the Edit Printing and Exporting page.
4. From the drop-down lists, select any metadata that you want displayed in the header and footer.
5. Select a Page size and Page orientation.
6. Type a new location or except the default location to save exported documents.
7. Click Save.
Delete reports

You can delete reports that are no longer being used.

**Before you begin**

To delete a report, you must have edit permissions for that report.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Queries & Reports**, then select the **Report** tab.

2. Select one or more reports to delete from the list of reports.

3. Click **Actions | Delete**. If you are confident in your actions, click **Yes**.

   The reports are deleted. Any server tasks that refer to deleted reports are no longer valid.

**Configure Internet Explorer 8 to automatically accept McAfee ePO downloads**

As a security measure, Microsoft Internet Explorer might block ePolicy Orchestrator downloads from occurring automatically. This behavior can be changed with an Internet Explorer configuration change. Certain operations in ePolicy Orchestrator, such as running a report or exporting information into an XML file, can cause Internet Explorer 8 to notify you that a download has been blocked.

Internet Explorer displays this notification in a yellow bar immediately below the tab bar reading *To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...* If you click the message, you are given the option to download the blocked file this one time. However, the message reappears the next time ePolicy Orchestrator attempts to send you a file. To make this message go away permanently, do the following:

**Task**

1. In Internet Explorer 8, select **Tools | Internet Options**.

2. Select the **Security** tab and click **Local Intranet**.

   If you have made your ePolicy Orchestrator server a trusted site, click **Trusted Sites** instead of **Local Intranet**.

3. Click **Custom Level...**

4. Scroll down to the **Automatic prompting for file downloads** option and set it to **Enable**. Click **OK** and click **Yes** to confirm your choice.

5. Click **OK** to close the **Internet Options** dialog.

   Attempting the original operation again downloads the requested file without the yellow caution bar appearing.
Using database servers

ePolicy Orchestrator can retrieve data from not only its own databases, but from some extensions as well.

You might need to register several different server types to accomplish tasks within ePolicy Orchestrator. These can include authentication servers, Active Directory catalogs, ePolicy Orchestrator servers, and database servers that work with specific extensions you have installed.

Database types
An extension can register a database type, otherwise known as a schema or structure, with ePolicy Orchestrator. If it does, that extension can provide data to queries, reports, dashboard monitors, and server tasks. To use this data, you must first register the server with ePolicy Orchestrator.

Database server
An database server is a combination of a server and a database type installed on that server. A server can host more than one database type, and a database type can be installed on multiple servers. Each specific combination of the two must be registered separately and is referred to as a database server.

After you register a database server, you can retrieve data from the database in queries, reports, dashboard monitors, and server tasks. If more than one database using the same database type is registered, you are required to select one of them as the default for that database type.

Work with database servers
Database servers can be registered, modified, viewed, and deleted.

Tasks

- Modify a database registration on page 268
  If connection information or login credentials for a database server changes, you must modify the registration to reflect the current state.

- Remove a registered database on page 269
  You can remove databases from the system when they are no longer needed.

Modify a database registration
If connection information or login credentials for a database server changes, you must modify the registration to reflect the current state.

Task
For option definitions, click ? in the interface.

1 Open the Registered Servers page by selecting Menu | Configuration | Registered Servers.

2 Select a database to edit, then click Actions | Edit.

3 Change the name or notes for the server, then click Next.

4 Modify the information as appropriate. If you need to verify the database connection, click Test Connection.

5 Click Save to save your changes.
Remove a registered database
You can remove databases from the system when they are no longer needed.

Task
For option definitions, click ? in the interface.

1  Open the Registered Servers page: select Menu | Configuration | Registered Servers.
2  Select a database to delete, and click Actions | Delete.
3  When the confirmation dialog appears, click Yes to delete the database.

The database has been deleted. Any queries, reports, or other items within ePolicy Orchestrator that used the deleted database will be marked invalid until updated to use a different database.
Issues and tickets

Issues are action items that can be prioritized, assigned, and tracked.

**Issues**

Users can create basic issues manually or the McAfee ePO server can automatically create issues in response to product events. For example, users with the proper permissions can configure ePolicy Orchestrator to automatically create a Benchmark Rule Compliance issue if a noncompliant system is discovered during an audit.

**Tickets**

A ticket is the external equivalent of an issue that exists in a ticketing server. Once a ticket is added to an issue, the issue is referred to as a "ticketed issue." A ticketed issue can have only one associated ticket.

**Integrating issues with third-party ticketing servers**

Integration of a ticketing server forces the creation of tickets associated with issues that were created in products. ePolicy Orchestrator supports these ticketing servers:

- Hewlett-Packard Openview Service Desk versions 4.5 and 5.1 — An integrated help desk and trouble ticketing solution
- BMC Remedy Action Request System versions 6.3 and 7.0 — A consolidated platform for automating and managing trouble tickets

**Contents**

- Issues and how they work
- Work with issues
- Purge closed issues
- Tickets and how they work
- Integration with ticketing servers
- Work with tickets
- Work with ticketing servers
- Upgrade a registered ticketing server
Issues and how they work

The way issues are managed is defined by users with proper permissions and the installed managed product extensions.

An issue's state, priority, severity, resolution, assignee, and due date are all user-defined, and can be changed at any time. You can also specify default issue responses from the Automatic Responses page. These defaults are automatically applied when an issue is created, based on a user-configured response. Responses also allow multiple events to be aggregated into a single issue so that the McAfee ePO server is not overwhelmed with large numbers of issues.

Issues can be deleted manually, and closed issues can be manually purged based on their age and automatically purged through a user-configured server task.

Work with issues

You can create, assign, view details of, edit, delete, and purge issues.

Tasks

- Create basic issues manually on page 272
  Basic issues can be created manually. Non-basic issues must be created automatically.
- Configure responses to automatically create issues on page 273
  You can use responses to automatically create issues when certain events occur.
- Manage issues on page 274
  You can add comments, assign, delete, edit, and view details of issues.

Create basic issues manually

Basic issues can be created manually. Non-basic issues must be created automatically.

Task

For option definitions, click ? in the interface.

1. Click Menu | Automation | Issues, then click Actions | New Issue.
2. In the New Issue dialog box, select Basic from the Create issue of type drop-down list, then click OK.
3. Configure the new issue.

<table>
<thead>
<tr>
<th>Use this...</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type a meaningful name for the issue.</td>
</tr>
<tr>
<td>Description</td>
<td>Type a meaningful description of the issue.</td>
</tr>
<tr>
<td>State</td>
<td>Assign a state to the issue:</td>
</tr>
<tr>
<td></td>
<td>- Unknown</td>
</tr>
<tr>
<td></td>
<td>- New</td>
</tr>
<tr>
<td></td>
<td>- Closed</td>
</tr>
<tr>
<td></td>
<td>- Resolved</td>
</tr>
<tr>
<td>Priority</td>
<td>Assign a priority to the issue:</td>
</tr>
<tr>
<td></td>
<td>- Unknown</td>
</tr>
<tr>
<td></td>
<td>- Lowest</td>
</tr>
<tr>
<td></td>
<td>- Low</td>
</tr>
<tr>
<td></td>
<td>- Medium</td>
</tr>
<tr>
<td></td>
<td>- High</td>
</tr>
<tr>
<td></td>
<td>- Highest</td>
</tr>
</tbody>
</table>
Use this... | To do this...
---|---
**Severity** | Assign a severity to the issue:
• Unknown | • Medium
• Lowest | • High
• Low | • Highest

**Resolution** | Assign a resolution to the issue. The issue resolution can be assigned once the issue is processed:
• None
• Fixed
• Waived
• Will not fix

**Assignee** | Type the user name of the person assigned to the issue, or choose them by clicking ...

**Due Date** | Select whether the issue has a due date and, if so, assign a date and time that the issue is due. Due dates in the past are not allowed.

4 Click Save.

**Configure responses to automatically create issues**
You can use responses to automatically create issues when certain events occur.

**Task**
For option definitions, click ? in the interface.

1 Click **Menu | Automation | Automatic Responses**, then click **Actions** and select **New Response**.
   The **Description** page of the **Response Builder** appears.

2 Complete the fields, then click **Next**.

3 Select properties to narrow the events that trigger the response, then click **Next**.

4 Next to **Aggregation**, select the frequency of events required to generate a response.

5 Select a method to group event.

6 Next to **Throttling**, select the maximum time period that you want this response to occur.

7 Click **Next**.

8 Select **Create issue** from the drop-down list, then select the type of issue to create.
   This choice determines the options that appear on this page.

9 Type a name and description for the issue. Optionally, select one or more variables for the name and description.
   This feature provides a number of variables providing information to help fix the issue.

10 If applicable, type or select additional options for the response.

11 Click **Next**.

12 Review the details for the response, then click Save.
Manage issues
You can add comments, assign, delete, edit, and view details of issues.

Task
For option definitions, click ? in the interface.
1. Click Menu | Automation | Issues.
2. Perform the tasks that you want.

<table>
<thead>
<tr>
<th>Task</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding comments to issues</td>
<td>1. Select the checkbox next to each issue you want to comment, then click Action</td>
</tr>
<tr>
<td></td>
<td>2. In the Add comment panel, type the comment you want to add to the selected issues.</td>
</tr>
<tr>
<td></td>
<td>3. Click OK to add the comment.</td>
</tr>
<tr>
<td>Adding tickets to issues</td>
<td>Select the checkbox next to each issue you want to add ticket, then click Action</td>
</tr>
<tr>
<td>Assigning issues</td>
<td>Select the checkbox next to each issue you want to assign, then click Assign to user.</td>
</tr>
<tr>
<td>Display required columns on Issues page</td>
<td>Click Actions</td>
</tr>
<tr>
<td>Deleting issues</td>
<td>1. Select the checkbox next to each issue you want to delete, then click Delete.</td>
</tr>
<tr>
<td></td>
<td>2. Click OK in the Action to delete the selected issues.</td>
</tr>
<tr>
<td>Editing issues</td>
<td>1. Select the checkbox next to an issue, then click Edit.</td>
</tr>
<tr>
<td></td>
<td>2. Edit the issue as needed.</td>
</tr>
<tr>
<td></td>
<td>3. Click Save.</td>
</tr>
<tr>
<td></td>
<td>Editing an issue breaks the issue-ticket connection.</td>
</tr>
<tr>
<td>Exporting the list of issues</td>
<td>Click Actions</td>
</tr>
<tr>
<td>Viewing issue details</td>
<td>Click an issue. The Issue Details page appears. This page shows all of the settings for the issue as well as the Issues Activity Log.</td>
</tr>
</tbody>
</table>

Purge closed issues
You can purge closed issues from the database to delete them permanently.
Purging a closed ticketing issue deletes the issue, but the associated ticket remains in the ticketing server database.
Tasks

- **Purge closed issues manually on page 275**
  Periodically purging closed issues from the database keeps it from getting too full.

- **Purge closed issues on a schedule on page 275**
  You can schedule a task to periodically purge the database of closed issues. This keeps the database smaller.

Purge closed issues manually
Periodically purging closed issues from the database keeps it from getting too full.

Task
For option definitions, click ? in the interface.

1. Click **Menu** | **Automation** | **Issues**, then click **Actions** | **Purge**.
2. In the **Purge** dialog box, type a number, then select a time unit.
3. Click **OK** to purge closed issues older than the specified date.

   ![This function affects all closed issues; not just those in the current view.]

Purge closed issues on a schedule
You can schedule a task to periodically purge the database of closed issues. This keeps the database smaller.

Task
For option definitions, click ? in the interface.

1. Click **Menu** | **Automation** | **Server Tasks**, then click **Actions** | **New Task**.
2. Type a name and description for the server task.
3. Enable or disable the schedule for the server task.
   The server task does not run until it is enabled.
4. Click **Next**.
   The **Actions** page appears.
5. From the drop-down list, select **Purge Closed Issues**.
6. Type a number, then select a time unit.
7. Click **Next**.
8. Schedule the server task, then click **Next**.
9. Review the details of the server task, then click **Save**.

The closed issues are purged at the time of the scheduled task.
Tickets and how they work

A ticket is the external equivalent of an issue that exists in a ticketing server. Once a ticket is added to an issue, the issue is referred to as a "ticketed issue."

Ways to add tickets to issues

A ticket can be added to an issue manually or automatically. A ticketed issue can have only one associated ticket.

When a ticket is added to an issue, the state of the resulting ticketed issue is changed to Ticketed, regardless of the issue's status prior to being ticketed. When the ticket is created in the ticketing server, that ticket's ID is added to the ticketed issue. The ticket ID creates the ticket-to-issue association.

After the steps for integrating a ticketing server are completed, all subsequent issues are ticketed automatically. McAfee recommends always adding an assignee to an issue before the ticket is created. If an assignee is added manually to a ticketed issue, you must add tickets manually to any issues that existed prior to the integration.

Assignment of ticketed issues to users

Adding an assignee manually to a ticketed issue is considered editing an issue, which breaks the issue-to-ticket association. Do this by specifying an assignee in the response, which creates issues. In this way, an assignee is added to the issue automatically when it is created.

For details, see How tickets and ticketed issues are closed.

How tickets and ticketed issues are closed

Ticketed issues are closed automatically by the system when the server task, which synchronizes ticketed issues, runs. This server task identifies tickets that changed to the Closed state since the last time the task ran. The status of a ticketed issue associated with a closed ticket is then changed to Closed. Also, that ticket's comments replace the comments in the ticketed issue if the integration of the ticketing server was configured to overwrite ticketed issue comments.

For details see Benefits of adding comments to ticketed issues.

Benefits of adding comments to ticketed issues

When a comment is added to a ticketed issue, it is added to the associated ticket immediately or the next time the Issue Synchronization server task runs. Ticketed issue comments are added only to tickets that are not in the Closed state.

If the ticketing server allows issue comments to be overwritten by ticket comments, when a ticket's state becomes Closed, comments for that ticket replace all comments in the associated ticketed issue. This process is performed when the server task, which synchronizes ticketed issues, identifies a ticket whose state changed to Closed since the last time the task was run. This task is performed only once for each closed ticket. Allowing issue comments to be overwritten by ticket comments can allow users with access to the system (but not to the ticketing server) the ability to see what happened to the ticket.

How tickets are reopened

A ticket is reopened when it is added to a previously added ticketed issue, whose ID can be matched to a ticket in the ticketing server. If the ID cannot be matched, a new ticket is created. Reopening a ticket does not reopen the associated ticket issue.

The configuration mapping for the ticketing server must also be configured to allow tickets to be reopened. See Required fields for mapping.
**Ticketed issue synchronization**

The Issues feature includes the Issue Synchronization server task, which synchronizes ticketed issues with their associated tickets in the ticketing server. This server task is disabled by default; it will not run until enabled.

When this server task runs, the system attempts to:

- Change the status of ticketed issues from **Ticketed** to **Closed** if the state of their associated tickets is closed.
- Create tickets for issues or add comments to tickets that the system was unable to create or add previously. For example, if a communication error occurred when the tickets or the comments were first added.
- Replace the comments of a ticketed issue with the comments of its associated ticket if the ticket's state is **Closed**, and the integration of the ticketing server was configured to overwrite ticketed issue comments.
- Change the state of each ticketed issue to **Assigned** if the ticketed issue does not have an assignee specified, or **New** if the registered server for the ticketing server is deleted.

**Integration with ticketing servers**

Integration of a ticketing server forces the creation of tickets associated with issues that were created in products.

The ePolicy Orchestrator software supports these ticketing servers:

- **Hewlett-Packard Openview Service Desk versions 4.5 and 5.1** — an integrated help desk and trouble ticketing solution.
- **BMC Remedy Action Request System versions 6.3 and 7.0** — a consolidated platform for automating and managing trouble tickets.

The person who performs this integration should be familiar with the ticketing server and its fields and forms. Integrating a ticketing server consists of these basic steps:

1. Configure ePolicy Orchestrator to integrate with the ticketing server.

   The system running the ticketing extension must be able to resolve the address of the Hewlett-Packard Openview Service Desk system. This might involve adding the IP address of the Service Desk system to the hosts file on the system running the ticketing extension, or setting up a domain trust between the two systems. See **Configuring the DNS for Service Desk 4.5**.

2. Integrate a ticketing server with ePolicy Orchestrator. Only one registered ticketing server can be integrated with ePolicy Orchestrator.

3. Configure the field mappings between issues and tickets.

**Considerations when deleting a registered ticketing server**

There might be times when you want to delete the registered server for your ticketing server. For example, if you upgrade your ticketing server.

When the registered server is deleted, the system changes the state of each ticketed issue to **Assigned**, or to **New** if the ticketed issue does not have a specified assignee, the next time the Issue synchronization server task is run. This is why it is important to disable scheduling for that server task if you are upgrading the ticketing server. For more details, see **Upgrading a registered ticketing server**.
When the registered ticketing server is deleted, the ticket ID that associated the ticket to the ticketed issue remains with that ticketed issue. This allows the ticket to be reopened if the issue-to-ticket association is broken. For example, if the server task runs before the upgraded server is registered. See How tickets are reopened.

**Required fields for mapping**

Mapping is the process by which information in issues is mapped to information in tickets. Each piece of information is called a field, and the fields in issues need to be mapped to corresponding fields in tickets.

To determine which ticket fields must be mapped, review the fields required to create a ticket on the ticketing form in the ticketing server. For information about which fields are required, see the documentation for your ticketing server.

For the system to know when to close ticketed issues, the field with the ticket's state must be mapped.

**Sample mappings**

When you register your ticketing server, you must also configure the field mappings for issues and tickets.

> The field mappings in the following examples are provided for reference only. Your mappings will depend on the fields required in your ticketing server and the values those fields accept.

Mapping is a two-way process. These examples demonstrate how to map an issue to a ticket and to map the ticket's status back to the issue's status. For example, if the ticket is marked as closed, the issue status will be updated to show that it is closed.

**Sample mapping for Hewlett-Packard Openview Service Desk**

This is a reference-only sample mapping for Hewlett-Packard Openview Service Desk versions 4.5 and 5.1.

> Source values, mapped values, and field IDs are case-sensitive.

**Map Issue to Ticket**

- **Ticket form**: Default_Problem
- **Ticket field**: Description
  - **Operation**: Identity
  - **Source field**: Name
- **Ticket field**: Status
  - **Operation**: Substitution
  - **Source field**: State
- **Values**: Default Value: 10

<table>
<thead>
<tr>
<th>Source Value</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW</td>
<td>10</td>
</tr>
<tr>
<td>RESOLVED</td>
<td>20</td>
</tr>
<tr>
<td>UNKNOWN</td>
<td>20</td>
</tr>
<tr>
<td>ASSIGNED</td>
<td>20</td>
</tr>
</tbody>
</table>
• Ticket field: Information
  • Operation: Identity
  • Source field: Description

• Ticket field: HistoryLines
  • Operation: Identity
  • Source field: Activity Log

• Ticket field: Type the name or ID for any open text field.
  • Operation: Identity
  • Source field: URL

Map Ticket back to Issue Status field

Because this section only maps the ticket's status, you are not prompted to add the ID of the issue's status field. This field is implied.

• Operation: Substitution
• Source field: Status
• Values: Default Value: TICKETED

<table>
<thead>
<tr>
<th>Source Value</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>

• Overwrite issue comments with ticket comments: selected
• Ticket Comment field: HistoryLines
• Tickets can be re-opened: selected

Sample mapping for BMC Remedy Action Request System
This is a reference-only sample mapping for BMC Remedy Action Request System versions 6.3 and 7.0.

Source values, mapped values, and field IDs are case-sensitive.

Map Issue to Ticket
• Ticket form: Help Desk

• Ticket field: 8
  • Operation: Identity
  • Source field: Name
Ticket field: 7
• Operation: Substitution
• Source field: State
• Values: Default Value: 0

<table>
<thead>
<tr>
<th>Source Value</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW</td>
<td>0</td>
</tr>
<tr>
<td>RESOLVED</td>
<td>2</td>
</tr>
<tr>
<td>ASSIGNED</td>
<td>1</td>
</tr>
</tbody>
</table>

Ticket field: 2
• Operation: Custom Mapping
• Source field: Type the user name for the ticketing server. This is the same user name provided for Authentication on the Description page of the Registered Server Builder.

Ticket field: 200000004
• Operation: Custom Mapping
• Source field: External

In this example, "External" specifies that the ticket was created by a product external to the ticketing server. You can type the name of the product instead, to indicate which product created the ticket.

Ticket field: 240000008
• Operation: Identity
• Source field: Activity Log
• Ticket field: Type the name or ID for any open text field.
• Operation: Identity
• Source field: URL

Map Ticket back to Issue Status field

Because this section only maps the ticket's status, you are not prompted to add the ID of the issue's status field. This field is implied.

• Operation: Substitution
• Source field: 7
• Values: Default Value: 0

<table>
<thead>
<tr>
<th>Source Value</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>

• Overwrite issue comments with ticket comments: selected

Issues and tickets Integration with ticketing servers
• Ticket Comment field: 240000008
• Tickets can be re-opened: selected

Work with tickets

You can add tickets to issues and synchronize ticketed issues with the Issue Synchronization server task.

Tasks

• Add tickets to issues on page 281
  You can add a ticket to a single issue, or to multiple issues at once.
• Synchronize ticketed issues on page 281
  The Issue synchronization server task updates ticketed issues and their associated tickets in the ticketing server.
• Synchronize ticketed issues on a schedule on page 281
  The Issue synchronization server task updates ticketed issues and their associated tickets in the ticketing server. Use this task to configure the Issue synchronization server task to run on a schedule.

Add tickets to issues

You can add a ticket to a single issue, or to multiple issues at once.
A ticket can be added in a similar way when viewing the details of an issue. When a ticket is added, a new ticket is created automatically in the ticketing server. Issues with existing tickets are ignored.

Task

For option definitions, click ? in the interface.

1  Click Menu | Automation | Issues, select the checkbox next to each issue, then click Actions | Add ticket.
2  In the Add Ticket panel, click OK to add a ticket to each selected issue.

Synchronize ticketed issues

The Issue synchronization server task updates ticketed issues and their associated tickets in the ticketing server.

Task

For option definitions, click ? in the interface.

1  Click Menu | Automation | Server Tasks.
2  Click Run next to the Issue synchronization task.
3  Review the results of the server task.
   For more details, see the section in this guide about the server task log.

Synchronize ticketed issues on a schedule

The Issue synchronization server task updates ticketed issues and their associated tickets in the ticketing server. Use this task to configure the Issue synchronization server task to run on a schedule.

The schedule for the Issue synchronization server task is disabled by default.
Task
For option definitions, click ? in the interface.

1. Click Menu | Automation | Server Tasks, then click Edit in the Actions column for the Issue synchronization task.

2. Select Enable next to Schedule status.
   If you disable the schedule, the server task will not run on a schedule, but you can still run it manually.

3. Click Next.

4. In the Actions tab, click Next.

5. Schedule the server task as needed, then click Next.

6. Review the details of the server task, then click Save.

Work with ticketing servers
These tasks integrate your ticketing server with ePolicy Orchestrator.

Tasks
- **Install extensions for ticketing server on page 282**
  You must integrate your ticketing system with ePolicy Orchestrator before you can issue tickets. The files that you copy to ePolicy Orchestrator depend on your ticketing system.

- **Register and map a ticketing server on page 285**
  Use these tasks to register and map a ticketing server. You must complete these tasks before tickets can be added to issues. Only one registered ticketing server can exist at a time.

- **Configure the field mappings on page 285**
  You must configure the field mappings for a ticketing server before you can associate tickets to issues.

**Install extensions for ticketing server**
You must integrate your ticketing system with ePolicy Orchestrator before you can issue tickets. The files that you copy to ePolicy Orchestrator depend on your ticketing system.

Task
1. Go to Start | Control Panel | Administrative Tools, then double-click Services.

2. In the Name column, double-click McAfee Policy Auditor Application Server.

3. Select the General tab.

4. Under Service status, click Stop.
   The server is now stopped.

5. Copy the required files for your ticketing server, then repeat steps 1-3.

6. Under Service status, click Start.
   The server is now running.
Tasks

• Stopping and starting the server on page 283
  You must stop an ePolicy Orchestrator server before you can copy the files required by the ticketing server. After the files are copied, start the server.

• Copying the Hewlett-Packard Openview Service Desk files on page 283
  Before you can use the Hewlett-Packard Openview Service Desk (Service Desk) 5.1 or 4.5 extension, you must copy certain files. For information about these files, see your Service Desk documentation.

• Copying the BMC Remedy Action Request System files on page 283
  Before you can use BMC Remedy Action Request System (Remedy) extension, you must copy certain files. For information about these files, see your Remedy documentation. The Remedy extension includes support for the Remedy 6.3 and 7.0 servers.

• Installing the ticketing server extensions on page 284
  You must install the ticketing server extensions before you can integrate them into the ePolicy Orchestrator ticketing system.

Stopping and starting the server
You must stop an ePolicy Orchestrator server before you can copy the files required by the ticketing server. After the files are copied, start the server.

Task

1. In Windows, click Start | Control Panel | Administrative Tools, then double-click Services.
2. In the Name column, locate then double-click McAfee Policy Auditor Application Server.
3. Select the General tab.
4. Under Service status, click Stop.
   The server is now stopped.
5. Copy the required files for your ticketing server, then repeat steps 1-3.
6. Under Service status, click Start.
   The server is now running.

Copying the Hewlett-Packard Openview Service Desk files
Before you can use the Hewlett-Packard Openview Service Desk (Service Desk) 5.1 or 4.5 extension, you must copy certain files. For information about these files, see your Service Desk documentation.

• Copy the required files to the Server\common\lib folder of your ePolicy Orchestrator software installation.
  For example, C:\Program Files\ McAfee\ ePolicy Orchestrator\Server\ common\ lib.

Copying the BMC Remedy Action Request System files
Before you can use BMC Remedy Action Request System (Remedy) extension, you must copy certain files. For information about these files, see your Remedy documentation. The Remedy extension includes support for the Remedy 6.3 and 7.0 servers.

You can use the Remedy 5.1 or 7.0 API files for the Remedy extension. McAfee does not support an integration with the Remedy 5.1 server, but the 5.1 API files will work for integrations with the Remedy 6.3 or 7.0 servers. The Remedy 6.3 API files are not supported.
**Task**

1. Copy the following required files to the Server\bin folder of your ePolicy Orchestrator software installation. For example, C:\Program Files\McAfee\ePolicy Orchestrator\Server\bin.

<table>
<thead>
<tr>
<th>Remedy API Version</th>
<th>Required Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remedy 5.1</td>
<td>• arapi51.dll</td>
</tr>
<tr>
<td></td>
<td>• arjni51.dll</td>
</tr>
<tr>
<td></td>
<td>• arrpc51.dll</td>
</tr>
<tr>
<td></td>
<td>• arutl51.dll</td>
</tr>
<tr>
<td>Remedy 7.0</td>
<td>• arapi70.dll</td>
</tr>
<tr>
<td></td>
<td>• arjni70.dll</td>
</tr>
<tr>
<td></td>
<td>• arrpc70.dll</td>
</tr>
<tr>
<td></td>
<td>• arutiljni70.dll</td>
</tr>
<tr>
<td></td>
<td>• arutil70.dll</td>
</tr>
<tr>
<td></td>
<td>• arxmlutil70.dll</td>
</tr>
<tr>
<td></td>
<td>• icudt32.dll</td>
</tr>
<tr>
<td></td>
<td>• icuin32.dll</td>
</tr>
<tr>
<td></td>
<td>• icuc32.dll</td>
</tr>
</tbody>
</table>

2. Copy the following required files to the Server\common\lib folder of your ePolicy Orchestrator installation. For example, C:\Program Files\McAfee\ePolicy Orchestrator\Server\common\lib.

<table>
<thead>
<tr>
<th>Remedy API Version</th>
<th>Required Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remedy 5.1</td>
<td>• arapi51.jar</td>
</tr>
<tr>
<td></td>
<td>• arutil51.jar</td>
</tr>
<tr>
<td>Remedy 7.0</td>
<td>• arapi70.jar</td>
</tr>
<tr>
<td></td>
<td>• arutil70.jar</td>
</tr>
</tbody>
</table>

**Installing the ticketing server extensions**

You must install the ticketing server extensions before you can integrate them into the ePolicy Orchestrator ticketing system.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Software | Extensions**, then click **Install Extension**.

You can only have one task updating the Master Repository at once. If you try to install an extension at the same time as a Master Repository update is running, the following error appears:

Unable to install extension com.mcafee.core.cdm.CommandException: Cannot check in the selected package while a pull task is running.

Wait until the Master Repository update is done and try to install your extension again.

2. Browse to the **InstallDir\ePolicy Orchestrator\Installer\Core\Extensions** folder and select the desired extension (zip) file.

Extensions for BMC Remedy 6.3 and 7.0, and Hewlett-Packard Openview Service Desk versions 4.5 and 5.1 are included with ePolicy Orchestrator.
3 Click OK.

**Register and map a ticketing server**

Use these tasks to register and map a ticketing server. You must complete these tasks before tickets can be added to issues. Only one registered ticketing server can exist at a time.

**Tasks**

- **Configuring the DNS for Hewlett-Packard Openview Service Desk 4.5 on page 285**
  Before you can integrate with Service Desk 4.5, configure the server information.

- **Registering a ticketing server on page 285**
  You must register a ticketing server before tickets can be associated with issues.

**Configuring the DNS for Hewlett-Packard Openview Service Desk 4.5**

Before you can integrate with Service Desk 4.5, configure the server information.

The system running the ticketing extension must be able to resolve the address of the Service Desk system.

**Task**

1. On the McAfee ePO server that is integrated with the ticketing system, use a text order to open the hosts file.
   The hosts file are located in the `c:\windows\system32\drivers\etc\` folder.

2. Edit the hosts file to include the IP address of the system running Service Desk 4.5, followed by a space, followed by the DNS suffix (the name of the system on which Service Desk 4.5 is running).
   For example, `168.212.226.204 SRVDSK45.qaad.com`.

3. Save and close the hosts file.

4. Restart the McAfee ePO server.

**Registering a ticketing server**

You must register a ticketing server before tickets can be associated with issues.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu** | **Configuration** | **Registered Servers**, then click **New Server**.

2. Select the server type for your ticketing server.
   This choice determines the options available on subsequent pages of the builder.

3. Type a name and description, then click **Next**.

4. Type the host for the server.

5. Type the port, user name, and password for the server.

6. If Service Desk 4.5 or 5.1 was selected, select a **Workflow**.

**Configure the field mappings**

You must configure the field mappings for a ticketing server before you can associate tickets to issues.
Tasks

- **Mapping issues to tickets on page 286**
  Configuring the field mapping from the issue to the ticket keeps your data synchronized when using a ticketing server.

- **Mapping tickets back to issue status on page 287**
  You need to configure field mapping from the ticket back to the issue's status, or state, field to fully integrate the ticketing server.

Mapping issues to tickets

Configuring the field mapping from the issue to the ticket keeps your data synchronized when using a ticketing server.

Source values, mapped values, and field IDs are case-sensitive.

Task

For option definitions, click ? in the interface.

1. Next to **Configure mapping**, click **Configure**.
2. Select the options from the **Mapping Options** pane as needed.
   
   Selected options appear in the **Mapping Definitions** pane with operators to specify how an issue should be mapped to a ticket, and how a ticket should be mapped back to an issue. Both mappings must be completed.
3. Under **Map Issue to Ticket**, type the name of a **Ticket form**.
4. Type a **Ticket field ID**.
5. Select an **Operation**.
6. Do one of the following:
   
   - If **Substitution** is selected, select an issue field in the **Source field** drop-down list, then click **Edit** next to **Values**. The **Edit Substitution Mapping** dialog box appears.
     1. Type a **Default Value** that should be substituted if a source value, which is not mapped, is returned.
     2. Type a **Source Value** for the issue, then type the **Mapped Value** that should be substituted for this value in the ticket.
     3. Click + to map another value.
     4. When finished, click **OK**.
   
   - If **Numeric Range** is selected, select an issue field to map in the **Source field** drop-down list, then click **Edit** next to **Values**. The **Edit Numeric Range Mapping** dialog box appears.
     1. Type a **Default Value** that should be substituted if a source range that is not mapped is returned.
     2. Type the **Source Range** for the issue, then type the **Mapped Value** that should be substituted for this range in the ticket.
     3. Click + to map another value.
     4. When finished, click **OK**.
• If Custom Mapping is selected, type the Value that should be added to the ticket.

7 Click + to map another ticket field.

**Mapping tickets back to issue status**
You need to configure field mapping from the ticket back to the issue's status, or state, field to fully integrate the ticketing server.

Because this section only maps the ticket's state/status, you are not prompted to add the ID of the issue's status (state) field. This field is implied.

Source values, mapped values, and field IDs are case-sensitive.

**Task**
For option definitions, click ? in the interface.

1 Under Map Ticket back to Issue Status field, select an Operation.

2 In the Source field, type the ID of the ticket field that contains the state/status of the ticket.

3 If Numeric Range or Substitution is selected for the Operation, click Edit next to Values.
   • If Numeric Range is selected, type a range of Ticket Values for the ticket, then type the Label that is substituted for this range in the issue.
   • If Substitution is selected, type a Source Value for the ticket, then type the Mapped Value that is substituted for this value in the issue.

4 Select Overwrite issue comments with ticket comments if you want issue comments to take precedence, then type the ID of the Ticket comment field that overwrites the data in the issue's comment field.

5 Select Tickets can be re-opened if you want that ability.

6 When finished, click Test Mapping.
   If the test is successful, a ticket ID appears in a dialog box. This is the ID for a test ticket which was created in your ticketing server.

7 Do one of the following:
   • If the test was successful, locate the ticket in your ticketing server, and verify that all the values for the basic issue type are mapped correctly, including the test's comments. Then click OK.

   The test mapping function verifies the mapping for the basic issue type, regardless of the issue type configured. Therefore, testing the mapping for issue types from other product extensions (extended issue types) can be successful per the basic mapping test, but you might see unexpected results in the tickets. For these issue types, verify that tickets added to issues after your ticketing server is fully integrated are created correctly.

   • If the test was unsuccessful, review your mappings and the status of the ticketing server.

8 When finished testing the mapping, click Save.

   You can save the configuration and register the server even if the mapping test fails.

9 When finished, click Save.
Upgrade a registered ticketing server

If you upgrade your ticketing server, you might need to modify the integration of the existing ticketing server for it to continue working.

If the server task, which synchronizes ticketed issues, runs after the existing registered ticketing server is modified or deleted, but before the upgraded ticketing server is integrated, the issue-to-ticket association is broken. If this occurs, complete this task, then manually add tickets to all previously ticketed issues. This causes the reopen function to run. For more details, see the section in this guide about how tickets are reopened.

Task

1. Do the following to disable the server task, which synchronizes ticketed issues.
   a. Click Menu | Automation | Server Tasks, then click the issue synchronization server task. The Description page of the Server Task Builder appears.
   b. Select Disable next to Schedule status.
   c. Click Save.

2. Ensure that no instances of the server task are running. If an instance is running, wait for it to complete or cancel it before continuing.

3. Do one of the following:
   • Edit the existing registered ticketing server based on the configuration requirements for the upgraded ticketing server.
   • Delete the existing registered ticketing server, then create a new one based on the configuration requirements for the upgraded ticketing server.

   For more details, see the sections in this guide about integrating ticketing servers, installing ticketing server extensions, and registering and configuring a ticketing server.

4. After you have configured the integration with the upgraded ticketing server, enable the server task, which synchronizes ticketed issues.
Your ePolicy Orchestrator server maintains log files that chronicle various kinds of events and actions going on within the system.

Contents
- The Audit Log
- The Server Task log
- The Threat Event Log

The Audit Log

Use the Audit Log to maintain and access a record of all McAfee ePO user actions. The Audit Log entries are displayed in a sortable table. For added flexibility, you can also filter the log so that it displays only failed actions, or only entries that are within a certain age.

The Audit Log displays seven columns:
- **Action** — The name of the action the McAfee ePO user attempted.
- **Completion Time** — The time the action finished.
- **Details** — More information about the action.
- **Priority** — Importance of the action.
- **Start Time** — The time the action was initiated.
- **Success** — Whether the action was successfully completed.
- **UserName** — User name of the logged-on user account that was used to take the action.

Audit Log entries can be queried against. You can create queries with the Query Builder wizard that target this data, or you can use the default queries that target this data. For example, the Failed Logon Attempts query retrieves a table of all failed logon attempts.

View and purge the Audit Log

You can view and purge a history of administrator actions.

When viewing the Audit Log, the available data depends on how often and by what age the Audit Log is purged.

⚠️ When you purge the Audit Log, the records are deleted permanently.
Task
For option definitions, click ? in the interface.

1. Click Menu | User Management | Audit Log and the Audit Logs are displayed.
2. Select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| View the Audit Log | 1. Click any of the column titles to sort the table by that column (alphabetically).  
                         2. From the Filter drop-down list, select an option to narrow the amount of visible data. You can remove all but the failed actions, or show only actions that occurred within a selected amount of time.  
                         3. Click any entry to view its details.                                                                                           |
| Purge the Audit Log| 1. Click Actions | Purge.  
                         2. In the Purge dialog box, next to Purge records older than, type a number and select a time unit.  
                         3. Click OK. All the Audit Log records are permanently deleted.                                                                          |

Schedule purging the Audit Log
You can automatically purge the Audit Log with a scheduled server task.

Task
For option definitions, click ? in the interface.

1. Click Menu | Automation | Server Tasks, then click Actions | New Task. The Server Task Builder wizard opens to the Description page.
2. Name, describe the task, and click Enabled after Schedule Status.
3. Click Next. The Actions page appears.
4. Select Purge Audit Log from the drop-down list.
5. After Purge records older than, type a number and select the time unit to use before purging the Audit Log entries.
6. Click Next. The Schedule page appears.
7. Schedule the task as needed, then click Next. The Summary page appears.
8. Review the task’s details, then click Save.

The Server Task log
The Server Task Log reports on events that occur on your ePolicy Orchestrator server.
From the Server Task Log you can view the detailed results of scheduled server tasks that are running or have been run on your server.
Entries in the log provides details about:

- The success or failure of the task
- Any sub-tasks run when performing the scheduled task

You can also terminate a task that is currently in progress.

**Manage the Server Task Log**

Once you open the Server Task Log you can view, filter, and purge the task logs as needed. The status of each server task appears in the **Status** column:

- **Waiting** — Task is waiting for another task to finish.
- **In Progress** — Task has started but not finished.
- **Paused** — Task was paused by a Server Task action.
- **Stopped** — Task was stopped by a Server Task action.
- **Failed** — Task was started but did not complete successfully.
- **Completed** — Task completed successfully.
- **Pending Termination** — A termination request has been sent.
- **Terminated** — Task was terminated manually before it finished.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu** | **Automation** | **Server Task Log**. The Server Task Log display appears.

2. Select on these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
</table>
| View the server task log. | 1 Click any of the column titles to sort the events.  
  2 Select any of the task logs, click **Actions**, then select one of the following to manipulate the server task log:  
  - **Choose Columns** — The Select Columns to Display page appears.  
  - **Export Table** — The Export page appears.  
  - **Purge** — The Purge dialog box appears. Type a number and a time unit to determine the number of task log entries to delete, then click **OK**.  
  - **Terminate Task** — Stop a task that is in progress. |
| Filter the server task log. | Select the desired filter from the **Filter** drop-down list. |
| Purge the server task log. | 1 Click **Actions** | **Purge**.  
  2 In the Purge dialog box, type a number of days, weeks, months, or years. Any item of this age and older are deleted.  
  3 Click **OK**. |

3. Click any of the column titles to sort the events.
4 Select any of the task logs, click **Actions**, then select one of the following to manipulate the server task log:

- **Choose Columns** — The Select Columns to Display page appears.
- **Export Table** — The Export page appears.
- **Purge** — The Purge dialog box appears. Type a number and a time unit to determine the number of task log entries to delete, then click **OK**.
- **Terminate Task** — Stop a task that is in progress.

### The Threat Event Log

Use the Threat Event Log to quickly view and sort through events in the database. The log can be purged only by age. You can choose which columns are displayed in the sortable table. You can choose from a variety of event data to use as columns.

Depending on which products you are managing, you can also take certain actions on the events. Actions are available in the Actions menu at the bottom of the page.

#### Common event format

Most managed products now use a common event format. The fields of this format can be used as columns in the Threat Event Log. These include:

- **Action Taken** — Action that was taken by the product in response to the threat.
- **Agent GUID** — Unique identifier of the agent that forwarded the event.
- **DAT Version** — DAT version on the system that sent the event.
- **Detecting Product Host Name** — Name of the system hosting the detecting product.
- **Detecting Product ID** — ID of the detecting product.
- **Detecting Product IPv4 Address** — IPv4 address of the system hosting the detecting product (if applicable).
- **Detecting Product IPv6 Address** — IPv6 address of the system hosting the detecting product (if applicable).
- **Detecting Product MAC Address** — MAC address of the system hosting the detecting product.
- **Detecting Product Name** — Name of the detecting managed product.
- **Detecting Product Version** — Version number of the detecting product.
- **Engine Version** — Version number of the detecting product’s engine (if applicable).
- **Event Category** — Category of the event. Possible categories depend on the product.
- **Event Generated Time (UTC)** — Time in Coordinated Universal Time that the event was detected.
- **Event ID** — Unique identifier of the event.
- **Event Received Time (UTC)** — Time in Coordinated Universal Time that the event was received by the McAfee ePO server.
- **File Path** — File path of the system which sent the event.
- Host Name — Name of the system which sent the event.
- IPv4 Address — IPv4 address of the system which sent the event.
- IPv6 Address — IPv6 address of the system which sent the event.
- MAC Address — MAC address of the system which sent the event.
- Port Number — Threat target port for network-homed threat classes.
- Process Name — Target process name (if applicable).
- Server ID — Server ID which sent the event.
- Threat Name — Name of the threat.
- Threat Source Host Name — System name from which the threat originated.
- Threat Source IPv4 Address — IPv4 address of the system from which the threat originated.
- Threat Source IPv6 Address — IPv6 address of the system from which the threat originated.
- Threat Source MAC Address — MAC address of the system from which the threat originated.
- Threat Source URL — URL from which the threat originated.
- Threat Source User Name — User name from which the threat originated.
- Threat Type — Class of the threat.
- User Name — Threat source user name or email address.

**View and purge the Threat Event Log**

You should periodically view and purge your threat events.

**Task**

For option definitions, click ? in the interface.

1. Click **Menu | Reporting | Threat Event Log**.
2. Select one of these actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Threat Event Log.</td>
<td>1 Click any of the column titles to sort the events. You can also click Actions</td>
</tr>
<tr>
<td></td>
<td>2 From the Available Columns list, select different table columns that meet your needs, then click Save.</td>
</tr>
<tr>
<td></td>
<td>3 Select events in the table, then click Actions and select Show Related Systems to see the details of the systems that sent the selected events.</td>
</tr>
<tr>
<td>Purge Threat Events.</td>
<td>1 Click Actions</td>
</tr>
<tr>
<td></td>
<td>3 Click OK.</td>
</tr>
</tbody>
</table>
Schedule purging the Threat Event Log
You can create a server task to automatically purge the Threat Event Log.

Task
For option definitions, click ? in the interface.

1. Click Menu | Automation | Server Tasks, then click Actions | New Task. The Server Task Builder wizard opens to the Description page.
2. Name, describe the task, and click Enabled after Schedule Status.
3. Click Next. The Actions page appears.
4. Select Purge Threat Event Log from the drop-down list.
5. Select whether to purge by age or from a queries results. If you purge by query, you must pick a query that results in a table of events.
6. Click Next. The Schedule page appears.
7. Schedule the task as needed, then click Next. The Summary page appears.
8. Review the task’s details, then click Save.
Disaster Recovery helps you quickly recover, or reinstall your ePolicy Orchestrator software. Disaster Recovery uses a Snapshot feature that periodically saves your ePolicy Orchestrator configuration, extensions, keys, and more to Snapshot records in the ePolicy Orchestrator database.

Contents
- What is Disaster Recovery
- Disaster Recovery components
- How Disaster Recovery works
- Configure a snapshot and restore the SQL database
- Disaster Recovery server settings

What is Disaster Recovery
The ePolicy Orchestrator Disaster Recovery feature uses a Snapshot process to save specific McAfee ePO server database records to the ePolicy Orchestrator Microsoft SQL database.

The records saved by the Snapshot contain the entire ePolicy Orchestrator configuration at the specific time the Snapshot is taken. Once the Snapshot records are saved to the database, you can use the Microsoft SQL backup feature to save the entire ePolicy Orchestrator database and restore it to another SQL server for an ePolicy Orchestrator restore.

Restore SQL database connection examples
Using the restored ePolicy Orchestrator SQL database server, that includes the Disaster Recovery Snapshot, you can connect it to:

- Restored McAfee ePO server hardware with the original server name and IP address — This allows you to recover from, for example, a failed ePolicy Orchestrator software upgrade.

- New McAfee ePO server hardware with the original server name and IP address — This allows you to upgrade, or restore, your server hardware and quickly resume managing your network systems.

- New McAfee ePO server hardware with a new server name and IP address — This allows you to, for example, move your server from one domain to another.

This example can provide a temporary network management solution while you rebuild and reinstall your McAfee ePO server hardware and software back to its original domain.

- Restored or new McAfee ePO server hardware with multiple network interface cards (NICs) — You must confirm the correct IP address is configured for the McAfee ePO server NIC.
The Snapshot is configured, depending on your SQL database version, to automatically run every day. If you configure a script to automatically run the SQL Backup and to copy the SQL backup file to your restore SQL database server, then you can more easily restore your McAfee ePO server. In addition, you can manually take a Snapshot or run your scripts to quickly save and backup particularly complex or important ePolicy Orchestrator changes.

The Disaster Recovery Snapshot monitor, found on your ePolicy Orchestrator dashboard, allows you to manage and monitor your Snapshots in one place.

Disaster Recovery components

Using Disaster Recovery to restore your ePolicy Orchestrator software requires certain hardware, software, access privileges, and information.

You need two hardware server platforms:

- Your existing McAfee ePO server hardware, referred to as your "primary" McAfee ePO server.
- Duplicate SQL server hardware, referred to as your "restore" server, running Microsoft SQL that matches your primary McAfee ePO server database. This restore server should be kept up to date with the latest primary McAfee ePO SQL database server configuration using Snapshot and Microsoft SQL backup processes.

To avoid backup and restore problems, your primary and restore server hardware and SQL versions should closely match.

Snapshot Dashboard monitor

The Server Snapshot monitor, found on your ePolicy Orchestrator dashboard, allows you to manage and monitor your Snapshots in one place.

If the Snapshot monitor does not appear in your Dashboard, see Manage dashboards to create a new dashboard and add the Disaster Recovery monitor.

Figure 23-1  Disaster Recovery dashboard Snapshot monitor

Using the Server Snapshot monitor allows you to:
• Click **Take Snapshot** to manually save a McAfee ePO server Snapshot.

• Click **See details of last run** to open the **Server Task Log Details** page. This page displays information and log messages about the most recent Snapshot saved.

• Confirm the date and time the last Snapshot was saved to the SQL database, next to **Last Run At**.

• Click the **Disaster Recovery** link to launch the Help page with Disaster Recovery information.

The color and title of the Snapshot monitor tells you the status of your latest Snapshot. For example:

• **Blue, Saving Snapshot to Database** — Snapshot process is in progress.

• **Green, Snapshot Saved to Database** — Snapshot process completed successfully and it is up to date.

• **Red, Snapshot Failed** — An error occurred during the Snapshot process.

• **Grey, No Snapshot Available** — No Disaster Recovery Snapshot has been saved.

• **Orange, Snapshot Out of Date** — Changes to the configuration have occurred and a recent Snapshot has not been saved. Changes that trigger a Snapshot Out of Date status include:
  • Any extension changed. For example updated, removed, deleted, upgraded, or downgraded
  • The "Keystore" folder changed.
  • The "conf" folder changed.
  • The Disaster Recovery passphrase changed in Server Settings.

**Disaster Recovery Snapshot Server Task**

You can use the Disaster Recovery Snapshot Server Task to disable and enable the Snapshot server task schedule.

The Snapshot server task schedule is enabled, by default, for the Microsoft SQL Server database and disabled, by default, for the Microsoft SQL Server Express Edition database.

**Disaster Recovery requirements**

To use Disaster Recovery you need the hardware, software, and information listed in the following table.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hardware requirements</strong></td>
<td></td>
</tr>
<tr>
<td>Primary McAfee ePO server</td>
<td>The server hardware requirements are determined by the number of systems managed.</td>
</tr>
<tr>
<td>server hardware</td>
<td></td>
</tr>
<tr>
<td>Restore McAfee ePO server</td>
<td>This server hardware should closely mirror your primary McAfee ePO server hardware.</td>
</tr>
<tr>
<td>hardware</td>
<td></td>
</tr>
<tr>
<td>Primary McAfee ePO server</td>
<td>This primary server should be up and running correctly with a recent Snapshot saved in the SQL database.</td>
</tr>
<tr>
<td>Primary SQL database</td>
<td>The primary SQL database, stores the McAfee ePO server configuration, client information, and Disaster Recovery Snapshot records.</td>
</tr>
</tbody>
</table>

**Software Requirements**
### Requirement | Description
--- | ---
Backup file of primary SQL database | Using either the Microsoft SQL Server Management Studio or the BACKUP (Transact-SQL) command-line, you can create a backup file of the primary database including the Snapshot records.

 Restore SQL database software | Using either the Microsoft SQL Server Management Studio or the RESTORE (Transact-SQL) command-line, you can restore the primary database including the Snapshot records on the restore SQL database server to duplicate the configuration of the primary SQL database.

 ePolicy Orchestrator software | This software, downloaded from the McAfee website, is used to install and configure the restore McAfee ePO server.

---

### Information requirements

| Requirement | Description |
--- | ---
Disaster Recovery Keystore encryption passphrase | This passphrase was added during the initial installation of the ePolicy Orchestrator software and decrypts sensitive information stored in the Disaster Recovery Snapshot. See Configure Disaster Recovery Server Settings to set the Keystore encryption passphrase. |

 Administrator privileges | You must be able to access both the primary and restore servers and the SQL database as, for example, DBOwner and DBCreator. |

 Last known IP address, DNS name, or NetBIOS name of the primary McAfee ePO server | If you change any one of these during the McAfee ePO server restore, ensure that the McAfee Agents have a way to locate the server. The easiest way to do this is to create a Canonical Name (CNAME) record in DNS that points requests from the old IP address, DNS name, or NetBIOS name of the primary McAfee ePO server to the new information for the restore McAfee ePO server. See Determine existing IP address, DNS name, and database name. |

 Cluster environment information | (Under development) |

---

**Determine existing IP address, DNS name, and database name**

The best time to find the IP address, DNS name, and database name of your McAfee ePO server is before it fails. This information could be needed during the Disaster Recovery restore process.

**Use remote command to determine the Microsoft SQL database server and database name**

The following ePolicy Orchestrator remote command is used to determine the Microsoft SQL database server and database name.

1. Type the following remote command in your browser address bar:
   
   ```
   https://localhost:8443/core/config
   ```

   In the previous command:
   
   - `localhost` — Is the name of your McAfee ePO server.
   - `:8443` — Is the default McAfee ePO server port number. Your server might be configured to use a different port number.

2. Save the following information that appears in the Configure Database Settings page:
   
   - **Host name or IP address**
   - **Database name**

   The previous information is used in the next section.

**Use Microsoft SQL Server Management Studio to find McAfee ePO server information**
From the Microsoft SQL Server Management Studio, use the following process to determine your existing McAfee ePO server information:

1. Use any method, for example Remote Desktop Connection, to log into the Host name or IP address of the Microsoft SQL database server found in step 2 of the previous section.

2. Open the Microsoft SQL Server Management Studio and connect to the SQL server.

3. From the Object Explorer list, click the **Database Server Name** | **Databases** | **Database name** | **Tables**. The list of tables appear in the Object Explorer Details list.

   *Database Server Name* and *Database Name* were determined in step 2 of the previous section.

4. Scroll down to find the **EPOServerInfo** table, right-click the table name and select **Edit top 200 Rows** from the list.

5. Find and save the information in the following records in the database:
   - **ePOVersion** — For example, 5.0.0
   - **DNSName** — For example, epo-2k8-epo50.server.com
   - **ComputerName** — For example, EPO-2K8-EPO50
   - **LastKnownTCP/IP** — For example, 172.10.10.10
   - **RmdSecureHttpPort** — For example, 8443

   This information is needed if you ever need to restore your ePolicy Orchestrator software.

---

### How Disaster Recovery works

To quickly reinstall the ePolicy Orchestrator software requires periodic snapshots of the ePolicy Orchestrator configuration. You must then back up and restore the database to a restore server, and reinstall the ePolicy Orchestrator software using the **Restore** option.

### Disaster Recovery Snapshot and backup overview

The Disaster Recovery Snapshot, SQL database backup, and copying processes create a duplicate ePolicy Orchestrator database on a restore SQL database server.

This is an overview of the Disaster Recovery Snapshot, SQL database backup, and copying processes. For details, see:
• **Create Snapshot**

• **Use Microsoft SQL to backup and restore database**

The following figure is an overview of the ePolicy Orchestrator software Disaster Recovery process and the hardware involved.

In this figure the SQL database is installed on the same server hardware as the McAfee ePO server. The McAfee ePO server and SQL database could be installed on different server hardware.

---

**Figure 23-2  McAfee ePO server Disaster Recovery Snapshot and backup**

The ePolicy Orchestrator software Disaster Recovery configuration includes these general steps performed on the McAfee ePO primary server:

1. Take a Snapshot of the McAfee ePO server configuration and save it to the primary SQL database. This can be done manually or via a default server task provided for this purpose.

   When the Snapshot is taken, these are the database files saved:

   - `C:\Program Files\McAfee\ePolicy Orchestrator\Server\extensions` — The default path to ePolicy Orchestrator software extension information.
   - `C:\Program Files\McAfee\ePolicy Orchestrator\Server\conf` — The default path to required files used by the ePolicy Orchestrator software extensions.
   - `C:\Program Files\McAfee\ePolicy Orchestrator\Server\keystore` — These keys are specifically for ePolicy Orchestrator agent-server communication and the repositories.
• C:\Program Files\McAfee\ePolicy Orchestrator\Server\DB\Keystore — The default path to the McAfee product installation server certificates.

• C:\Program Files\McAfee\ePolicy Orchestrator\Server\DB\Software — The default path to the McAfee product installation files.

The Disaster Recovery Snapshot records saved include the paths you have configured for your registered executables. The registered executable files are not backed up and you must replace those executable files when you restore the McAfee ePO server. After you restore the McAfee ePO server, any registered executables with broken paths are red on the Registered Executables page.

You should test your registered executable paths after you restore your McAfee ePO server. Some registered executable paths might not appear red, but still fail because of dependency issues related to the registered executables.

2 Backup the SQL database using either the Microsoft SQL Server Management Studio or the BACKUP (Transact-SQL) command-line process.

3 Copy the SQL database backup file, created in step 2, to the duplicate restore SQL server.

It is critical you complete steps 2 and 3 to copy your snapshots from your primary SQL server to your restore SQL server in order to use the Disaster Recovery feature.

This completes the McAfee ePO server Disaster Recovery Snapshot and backup process. You do not need to continue with the following McAfee ePO server recovery installation unless you are reinstalling the ePolicy Orchestrator software.

**McAfee ePO server recovery installation overview**

Reinstalling the ePolicy Orchestrator software is the last step in quickly restoring the McAfee ePO server.

This is an overview of reinstalling the ePolicy Orchestrator software on the restore McAfee ePO server. For details, see *ePolicy Orchestrator 5.0.0 Software Installation Guide.*
The following figure provides an overview of the McAfee ePO server reinstallation.

In this figure the SQL database is installed in the same server hardware as the McAfee ePO server. The McAfee ePO server and SQL database could be installed on different server hardware.

---

**Figure 23-3 McAfee ePO server recovery installation**

The ePolicy Orchestrator software installation using the Disaster Recovery Snapshot file includes these general steps performed on the McAfee ePO restore server:

1. Find the SQL database backup file, copied in step 3, of the previous section, and use either the Microsoft SQL Server Management Studio or the RESTORE (Transact-SQL) command-line process to restore the primary SQL server configuration to the restore SQL server.

2. During the ePolicy Orchestrator database software installation:
   a. On the Software Welcome dialog box, click **Restore ePO from an existing Disaster Recovery database Snapshot**.
   b. Select **Microsoft SQL Server** to link the ePolicy Orchestrator software to the restore SQL database that had the primary McAfee ePO server configuration restored in step 1.

   After the ePolicy Orchestrator software installation is started, the database records saved during the Snapshot process are used in the software configuration instead of creating new records in the database.

3. If you changed the last known IP address, DNS name, or NetBIOS name of the primary McAfee ePO server, when creating the restore McAfee ePO server the McAfee Agents will not be able to connect to the restored McAfee ePO server. The easiest way to do this is to create a CNAME record in DNS that points requests from the old IP address, DNS name, or NetBIOS name of the primary McAfee ePO server to the new information for the restore McAfee ePO server.

   See **What is Disaster Recovery** for various server examples of restoring the SQL database connection to the McAfee ePO server.

Now the McAfee ePO restore server is running with the exact same configuration as the primary server. The clients can connect to the restore server and you can manage them exactly as before the primary McAfee ePO server was removed.
Failback to the original server site

After restoring the ePolicy Orchestrator software and SQL server database on new server hardware, you might want to failback to your original McAfee ePO primary server. If the new restored server hardware is in a remote recovery site, for example Miami, you might only want to use this server until new server hardware is, for example, reinstalled or upgraded in, for example, New York.

To failback to your original primary server simply perform these general processes between the McAfee ePO remote server in Miami, back to the primary server in New York:

1. Create a Disaster Recovery Snapshot of the remote McAfee ePO server and backup the SQL database.
2. Copy the ePO_<server_name>.bak SQL file from the remote server in Miami back to the primary server in New York.
3. Reinstall the ePolicy Orchestrator software back on the primary McAfee ePO server in New York.

After the failback process is complete your primary server in New York is back up and you can continue to use your remote server in Miami as your restore server.

Configure a snapshot and restore the SQL database

To quickly reinstall a McAfee ePO server, configure a Disaster Recovery snapshot to save, or confirm a snapshot is being saved to the SQL database. Then back up that SQL database, which includes the snapshot, and copy the database backup file to a restore SQL Server.

A quick reinstallation of the McAfee ePO server requires these tasks.

Tasks

- **Configure Disaster Recovery Server Task on page 303**
  Use the Disaster Recovery Snapshot Server Task to modify the scheduled automatic Snapshots of your McAfee ePO server configuration saved to the SQL database.

- **Create Snapshot on page 304**
  Creating frequent Disaster Recovery Snapshots of your primary McAfee ePO server is the first step in quickly restoring a McAfee ePO server.

- **Use Microsoft SQL to backup and restore database on page 307**
  To save the Disaster Recovery Snapshot with the McAfee ePO server configuration information, use Microsoft SQL Server procedures.

Configure Disaster Recovery Server Task

Use the Disaster Recovery Snapshot Server Task to modify the scheduled automatic Snapshots of your McAfee ePO server configuration saved to the SQL database.

The preconfigured status of your Disaster Recovery Server Snapshot Task depends on the SQL database your McAfee ePO server uses. Disaster Recovery Snapshot is enabled, by default, on all Microsoft SQL Servers except the Express Edition.

McAfee does not recommend enabling Disaster Recovery Snapshot scheduling with the Microsoft SQL Server Express Editions because of the data file size limitations. The maximum data file size for Microsoft SQL Server 2005 Express Edition is only 4 GB and 10 GB for Microsoft SQL Server 2008 and 2012 Express Editions.

You can only run one Disaster Recovery Snapshot at a time. If you run multiple Snapshots, only the last Snapshot creates any output and the previous Snapshots are overwritten.

You can modify the default Disaster Recovery Server Task as needed.
Task
For option definitions, click ? in the interface.

1. Click Menu | Server Tasks, select Disaster Recovery Snapshot Server from the Server Tasks list, and click Edit.

   The Disaster Recovery Server Task wizard appears.

2. From the Descriptions tab Schedule status, click Enabled or Disabled as needed.

3. From the Schedule tab, change the following settings as needed:
   - Schedule type — Set the frequency when the Snapshot is saved.
   - Start Date and End Date — Set the start and end dates the Snapshots are saved, or click No End Date to have the task run continuously.
   - Schedule — Set the time when the Snapshot is saved. By default, the Snapshot task runs at 1:59 a.m. daily.

   McAfee recommends that you run the Disaster Recovery Server Task during off hours to minimize the changes to the database during the Snapshot creation process.

4. From the Summary tab, confirm the server task is configured correctly and click Save.

Create Snapshot
Creating frequent Disaster Recovery Snapshots of your primary McAfee ePO server is the first step in quickly restoring a McAfee ePO server.

After you make many configuration changes to the McAfee software, you should take a Disaster Recovery Snapshot manually using any of the following tasks.

- Create a Disaster Recovery Snapshot Server task to automate server snapshots.

Tasks
- Create Snapshot from Dashboard on page 304
  Use the ePolicy Orchestrator Dashboard to take Disaster Recovery Snapshots of your primary McAfee ePO server and to monitor the Snapshot process as the Dashboard status changes.

- Create Snapshot from Web API on page 305
  Use the ePolicy Orchestrator Web API to take Disaster Recovery Snapshots of your primary McAfee ePO server. Doing so enables you to use one command string to complete the process.

Create Snapshot from Dashboard
Use the ePolicy Orchestrator Dashboard to take Disaster Recovery Snapshots of your primary McAfee ePO server and to monitor the Snapshot process as the Dashboard status changes.

Task
For option definitions, click ? in the interface.

1. Click Menu | Reporting | Dashboards to see the ePO Server Snapshot monitor.

   If needed click Add Monitor and select ePO Server Snapshot from the list and drag it to the dashboard.
2  Click **Take Snapshot** to start saving the McAfee ePO server configuration.

   During the Snapshot process the Snapshot Monitor title bar changes to indicate the status of the process. See **Snapshot Dashboard monitor** for Snapshot monitor status indicators.

   The Snapshot process could take from 10 minutes to more than an hour to complete, depending on the complexity and size of your ePolicy Orchestrator managed network. This process should not affect your McAfee ePO server performance.

3  If needed, click **See details of current run** to open the Server Task Log Details of the last saved Snapshot.

   After the Snapshot process is complete, you click **See details of current run** to open the Server Task Log Details of the last saved Snapshot.

   The latest Disaster Recovery Snapshot is saved to the McAfee ePO server primary SQL database. The database is now ready to backup and copy to the restore SQL database server.

**Create Snapshot from Web API**

Use the ePolicy Orchestrator Web API to take Disaster Recovery Snapshots of your primary McAfee ePO server. Doing so enables you to use one command string to complete the process.

All the commands described in this task are typed in your web browser address bar to access your McAfee ePO server remotely.

   You are prompted for the administrator username and password before the output is displayed.

   See the **McAfee ePolicy Orchestrator 5.0.0 Scripting Guide** for detailed Web API use and examples.

**Task**

For option definitions, click ? in the interface.

1  Use the following ePolicy Orchestrator Web API Help command to determine the parameters needed to run the Snapshot:


   In the previous command:
   - localhost: — The name of your ePolicy Orchestrator server name.
   - 8443 — Destination port, identified as "8443" (the default), in this example.
   - /remote/core.help?command= — Calls the Web API Help
   - scheduler.runServerTask — Calls the specific server task Help

   The previous example command returns this help.

   **OK:**

   scheduler.runServerTask taskName

   Runs a server task and returns the task log ID. Use task log ID with the 'tasklog.listTaskHistory' command to view the running task's status. Returns the task log ID or throws on error.

   Requires permission to run server tasks.

   Parameters:

   [taskId (param 1) | taskName] — The unique id or name of the task
2. Use the following command to list all the server tasks and determine the taskName parameter needed to run the Snapshot server task:

https://localhost:8443/remote/scheduler.listAllServerTasks?:output=terse

The previous example command returns a list that looks similar to the following. The exact list displayed depends on your permissions and the extensions installed.

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Next Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Disaster Recovery Snapshot Server</td>
<td>8/1/12 at 1:59 AM</td>
</tr>
<tr>
<td>10</td>
<td>Default Delete Detected Systems Task</td>
<td>None</td>
</tr>
<tr>
<td>12</td>
<td>Roll Up Data (Local ePO Servers)</td>
<td>None</td>
</tr>
<tr>
<td>8</td>
<td>Purge Threat and Client Events Older than 90 Days</td>
<td>None</td>
</tr>
<tr>
<td>3</td>
<td>Issue synchronization</td>
<td>None</td>
</tr>
<tr>
<td>15</td>
<td>Inactive Agent Cleanup Task</td>
<td>None</td>
</tr>
<tr>
<td>4</td>
<td>Duplicate Agent GUID - remove systems with potentially duplicated GUIDs</td>
<td>None</td>
</tr>
<tr>
<td>6</td>
<td>Synchronize Shared Policies</td>
<td>None</td>
</tr>
<tr>
<td>7</td>
<td>Synchronize Shared Tasks</td>
<td>None</td>
</tr>
<tr>
<td>11</td>
<td>PSD: Update Sensor Deployment Client Tasks</td>
<td>None</td>
</tr>
<tr>
<td>14</td>
<td>Update Master Repository</td>
<td>8/1/12 at 2:17 AM</td>
</tr>
</tbody>
</table>

3. Using the task name, Disaster Recovery Snapshot Server found in the previous step, run the Snapshot server task using the following command:


If the task is successful, output similar to the following appears.

OK: 102

The Snapshot process could take from 10 minutes to more than an hour to complete, depending on the complexity and size of your ePolicy Orchestrator managed network. This process should not affect your McAfee ePO server performance.

4. Confirm the Web API server task Snapshot ran successfully.

a. Use the following command to find the Disaster Recovery Snapshot Server task log ID:

https://localhost:8443/remote/tasklog.listTaskHistory?taskName=Disaster%20Recovery%20Snapshot%20Server

This command displays all of the Disaster Recovery Snapshot Server tasks. Find the most recent task and note the ID number. For example, ID: 102 in the following:

ID: 102
Name: Disaster Recovery Snapshot Server
Start Date: 8/7/12 11:00:34 AM
End Date: 8/7/12 11:01:18 AM
User Name: admin
Status: Completed
Source: scheduler
Duration: Less than a minute
Use the following command and that Task ID number 102 to display all task log messages.

https://localhost:8443/remote/tasklog.listMessages?taskLogId=102

Scroll to the end of the messages and find the following:

OK:
Date: 8/7/12 11:00:34 AM
Message: Snapshot Server to Database

Date: 8/7/12 11:00:34 AM
Message: Starting to save server snapshot to the database...

Date: 8/7/12 11:01:18 AM
Message: Successfully saved server snapshot to the database

Use Microsoft SQL to backup and restore database
To save the Disaster Recovery Snapshot with the McAfee ePO server configuration information, use Microsoft SQL Server procedures.

Before you begin
To complete this task you must have connectivity and authorization to copy files between your primary and restore McAfee ePO SQL servers. See Appendix A: Maintaining ePolicy Orchestrator Databases for details.

After you created a Snapshot of the McAfee ePO server configuration, you must:
1. Create a Microsoft SQL Server backup of the database using:
   - Microsoft SQL Server Management Studio
   - Microsoft Transact-SQL
2. Copy the backup file created to your restore SQL server.
3. Restore the backup of the primary SQL database that includes the Disaster Recovery Snapshot records using:
   - Microsoft SQL Server Management Studio
   - Microsoft Transact-SQL

See your Microsoft SQL Server documentation for details to complete these processes.

This creates a duplicate SQL server ready for restoration, if needed, by connecting it to a new ePolicy Orchestrator software installation using the Restore option.
Disaster Recovery server settings

Using Disaster Recovery to create an ePolicy Orchestrator server Snapshot provides you with a quick recovery method for the McAfee ePO server.

Configure Disaster Recovery Server Settings

You can change the Keystore encryption passphrase used when you installed the ePolicy Orchestrator software and link it to an SQL database restored with Disaster Recovery Snapshot records.

**Before you begin**

You must have administrator rights to change the Keystore encryption passphrase.

As an administrator, this setting is helpful if you have lost, or forgotten, the Keystore encryption passphrase configured during the ePolicy Orchestrator software installation. You can change the existing passphrase without knowing the previously configured passphrase.

**Task**

For option definitions, click ? in the interface.

1. Click Menu | Configuration | Server Settings, select Disaster Recovery from the Setting Categories, then click Edit.
2. From Keystore encryption passphrase, click Change passphrase and type the new passphrase and confirm it.

The Keystore encryption passphrase is used to encrypt and decrypt the sensitive information stored in the server Snapshot. This passphrase is required during the McAfee ePO server recovery process. Make note of this passphrase.

The ePolicy Orchestrator database must be periodically copied to a restore Microsoft SQL Database server to create an actual backup database. See Configure Snapshot and restore SQL database for database server backup and restore processes.
Maintaining ePolicy Orchestrator Databases

Your ePolicy Orchestrator databases require regular maintenance to promote optimal performance and to protect your data.

Use the Microsoft management tool appropriate for your version of SQL:

<table>
<thead>
<tr>
<th>SQL Version</th>
<th>Management Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL 2008 and 2012</td>
<td>SQL Server Management Studio</td>
</tr>
<tr>
<td>SQL Express</td>
<td>SQL Server Management Studio Express</td>
</tr>
</tbody>
</table>

Depending on your deployment of the ePolicy Orchestrator software, plan on spending a few hours each week on regular database backups and maintenance. Perform these tasks regularly, either weekly or daily. However, these tasks are not the only maintenance tasks available. See your SQL documentation for details on what else you can do to maintain your database.

Contents

- Considerations for a SQL maintenance plan
- Choosing a SQL database recovery model
- Defragmenting table data
- Create a SQL Maintenance Plan
- Change the SQL Server connection information

Considerations for a SQL maintenance plan

Your SQL database is an integral part of ePolicy Orchestrator. If you don't maintain and back up the information in your database and a failure occurs you could lose all of your ePolicy Orchestrator configuration and your network protection.

Maintaining your ePolicy Orchestrator SQL database includes two major components:

- ePolicy Orchestrator Disaster Recovery
- SQL database maintenance and backup

Each of these components is described in the following sections.
ePolicy Orchestrator Disaster Recovery

The ePolicy Orchestrator recovery process uses a Disaster Recovery Snapshot feature that periodically saves your ePolicy Orchestrator configuration, extensions, keys, and more to the Disaster Recovery Snapshot records in the ePolicy Orchestrator database. The records saved by the Disaster Recovery Snapshot contain the entire ePolicy Orchestrator configuration at the specific time the Disaster Recovery Snapshot is taken.

To quickly recover from a database failure, it is important that you periodically create Disaster Recovery Snapshots of your ePolicy Orchestrator database, back up the database files, and copy that backup file from your primary SQL server to your restore SQL server.

SQL database maintenance and backup

Your SQL database is the central storage component for all data created and used by ePolicy Orchestrator. It stores your managed system properties, their policy information, and directory structure, plus all other relevant data the server needs to keep your systems up-to-date. Maintaining your ePolicy Orchestrator SQL database should be a priority. Your periodic SQL database maintenance should include:

- Data and (transaction) log file management — This should include:
  - Separating data and log files
  - Configuring auto-growth correctly
  - Configuring instant file initialization
  - Confirming auto-shrink is not enabled and shrink is not part of any maintenance plan
- Index defragmentation — Refer to Defragment table data
- Corruption detection — Using the Check Database Integrity Task or DBCC CHECKDB
- Backup creation and file management
- Scheduling these tasks to occur automatically

Fortunately, your SQL database has features, such as the Maintenance Plan Wizard and Transact-SQL scripts, you can configure to automatically perform these tasks.

Choosing a SQL database recovery model

From an ePolicy Orchestrator perspective, there are two models available for maintaining your Microsoft SQL Server (SQL Server) databases: Simple Recovery Model and Full Recovery Model. McAfee recommends you use the simple recovery model for the ePolicy Orchestrator database.

Using the simple recovery model, the SQL Server identifies backed-up records as Inactive — also known as truncating the log. Truncating the log allows any new operations logged to the transaction log to overwrite the inactive entries, which helps prevent the transaction log file size from growing.

Using the full recovery model, the transaction log continues to grow until it consumes all available disk space, unless a periodic backup of the transaction log is performed. If your ePolicy Orchestrator database is configured to use the full recovery model, perform regular transaction log backups to limit its size.

If you use the simple recovery model, once the Checkpoint occurs and the records are flushed to the disk, the SQL Server truncates the transaction log. Truncating the transaction log frees-up space in the transaction log file.
In the simple recovery model, the transaction log is not backed up, and only the regular full backups of the ePolicy Orchestrator database are made. If a disaster occurs, you can only recover to the last full backup. All changes that occurred since the last full backup are lost.

For most enterprise customers, using the simple recovery model is an acceptable solution because mostly only event information is lost between backups. If you use the full recovery model, it involves the administrative overhead of regularly performing backups of the transaction log for your ePolicy Orchestrator database.

Primarily for this reason, McAfee recommends you use the simple recovery model for the ePolicy Orchestrator database.

If you choose to use the full recovery model, make sure that you have a good backup plan for both your ePolicy Orchestrator database and the transaction log. A discussion of SQL Server database backup plans is beyond the scope of this guide. For more details, see the Microsoft SQL Server documentation.

**Defragmenting table data**

One of the most significant performance problems found in databases is table data fragmentation. You can reorganize, or if needed rebuild the table data to solve this problem.

Database table data fragmentation is similar to an index at the end of a large book. A single index entry in this large book might point to several pages scattered throughout the book. This means you must scan each page for the specific information you are looking for.

This is significantly different from the index of a telephone directory that stores its data in sorted order. A typical query for a common name like "Jones" might span multiple consecutive pages, but they are always in a sorted order.

In the case of a database, you start out with the table data looking like a telephone directory, but over time, end up with the data looking more like a large book index.

You need to occasionally re-sort the data to recreate the sorted telephone directory order. This is where reorganizing or rebuilding your indexes is critical. Over time your database becomes more fragmented especially if it manages a large environment where thousands of events are written to it on a daily basis.

Setting up a SQL Maintenance Task to automatically reorganize and rebuild your indexes is essential to maintain proper performance on the McAfee ePO server. You can include the re-indexing as part of your regular backup schedule to combine everything in one task.

When configuring your task do not shrink your database. This is a common misconception that many administrators choose when building their maintenance task.

The drawback to using the SQL Maintenance Task is that it causes all indexes to be rebuilt, or reorganized, irrespective of the level of table fragmentation. To minimize the time spent rebuilding and reorganizing a large production database, consider configuring a SQL Server Agent job that would execute a custom SQL script to selectively reorganize or rebuild indexes based on their level of fragmentation.

You can determine the fragmentation level of an index by querying the `sys.dm_db_index_physical_stats` Dynamic management view (DMV). There is SQL Server database maintenance information online that provide sample SQL Scripts that you can use which selectively rebuilds or reorganizes the indexes depending on the fragmentation level. See `sys.dm_db_index_physical_stats (Transact-SQL)` Example D in the Microsoft Library for more information.
A common rule to determine whether to reorganize or rebuild the table data, depending on table fragmentation, is:

- Less than 30% — Reorganize the table data.
- Greater than 30% — Rebuild the table data.

Reorganizing the index is an online operation (meaning the table is available for querying during this time) and is recommended. For tables that are heavily fragmented, rebuilding them might be the best option, but it must be executed offline unless you are using SQL Server Enterprise Edition.

For additional information see, Reorganizing and Rebuilding Indexes in the online Microsoft Library.

**Create a SQL Maintenance Plan**

To automatically back up your ePolicy Orchestrator database, create a SQL database maintenance plan using, for example, SQL Server Management Studio.

You should use the ePolicy Orchestrator Disaster Recovery Snapshot feature to periodically save your ePolicy Orchestrator configuration, extensions, keys, and more to Disaster Recovery Snapshot records in the SQL database. The Disaster Recovery Snapshot records, along with the regularly backing up your database allow you to quickly recover if the hardware hosting your McAfee ePO server ever fails.

**Task**

1. Create a new maintenance plan. See the Microsoft information at:
   - How to: Start the Maintenance Plan Wizard (SQL Server Management Studio)
   - Create a Maintenance Plan
   The Maintenance Plan Wizard starts.

2. Type a maintenance plan name, for example ePO Database Maintenance Plans.

3. Configure a schedule for the maintenance plan. Schedule the task to run during off-peak times. For example, configure a recurring task, to run weekly, every Saturday at 11:00 pm, with no end date.

4. Define the following maintenance tasks to perform:
   - Check Database Integrity
   - Rebuild Index
   - Back Up Database (Full)

5. Define the maintenance task order as:
   - Check Database Integrity
   - Back Up Database (Full)
   - Rebuild Index

   These tasks can be interchangeable in the order they execute. McAfee recommends the database backup occurs before the index rebuild process. This ensures there is a working backup copy of the database in case a problem occurs during the rebuild process.

6. Define the Check Database Integrity task to include:
   - ePolicy Orchestrator database name
   - Include indexes
7 Define the Back Up Database (Full) task to include:
   • ePolicy Orchestrator database name
   • Backup path location

8 Define Rebuild Index task to include:
   • ePolicy Orchestrator database name
   • Object: Tables and Views
   • Change free space per page percentage to 10%

   An Index Rebuild task would cause the statistics to be updated as part of the rebuild (effectively with full scan) — so an Update Statistics task is not needed after a Rebuild Index.

9 Define Select Report Options to include:
   • Write a report to a text file
   • Browse to the folder location

This creates a maintenance plan to automatically back up your ePolicy Orchestrator database.

Change the SQL Server connection information

You can edit the SQL Server connection configuration details using a special ePolicy Orchestrator webpage.

Edit connection configuration details when you need to change the user account information in ePolicy Orchestrator when you change to the SQL Server authentication modes in SQL Server Enterprise Manager or SQL Server Management Studio. Do this if you need to use a privileged SQL user account for added network security.

Change the database settings to point this McAfee ePO server to an McAfee ePO database that is not an exact match can cause the removal of product extensions and the loss of all associated data. McAfee recommends performing this task only to change the configuration of your existing database.

You can use the webpage at https://<servername>:<port>/core/config to adjust any database configuration file information that used to be done with the Cfgnaims.exe file.

Things to know about this page:

- Authentication — If the database is running, this page uses normal McAfee ePO user authentication and only an administrator can access it. If the database is down, a connection is required from the system running the SQL Server.

- The McAfee ePO server must be restarted for any configuration changes to take effect.

- As a last resort, you might edit the configuration file (\<ePO installation directory>server \conf\orion\db.properties) by hand, put in the plaintext password, start the server, then use the config page to re-edit the db config, which stores the encrypted version of the passphrase.

**Task**

For option definitions, click ? in the interface.

1 Log on to ePolicy Orchestrator with administrator credentials.

2 Type the following URL in the browser's address field.

   https://<servername>:<port>/core/config
3. On the **Configure Database Settings** page, change the credentials or SQL Server information, as needed. Other settings on this page include:

- **Host name or IP address** — Indicates the host name or IP address of the database server used.
- **Database server instance** — Indicates the server instance name if the server is in a cluster.
- **Database server port** — Indicates the server port used to communicate between the McAfee ePO server and the SQL database server.
- **Database name** — Indicates the specific database name used on the SQL Server.
- **SSL communication with database server** — Indicates if the connection port never uses, tries to use, or always uses SSL.

Click **Test Connection** to confirm the connection between the McAfee ePO server and the SQL database server.

4. Click **Apply** when done.

5. Restart the system or ePolicy Orchestrator services to apply the changes.
Opening a remote console connection

Using your McAfee ePO server name, or IP address, and the server communication port number you can connect and configure ePolicy Orchestrator from any supported Internet browser.

When you connect to ePolicy Orchestrator using a remote connection, some configuration changes are not allowed. For example, you can't run registered executables from a remote connection.

To configure a remote connection you must determine your McAfee ePO server name, or IP address, and the server communication port number. When you open ePO, while logged into your physical McAfee ePO server, notice the address that appears in your browser. It should be similar to:

https://win-2k8-epo50:8443/core/orionSplashScreen.do

In this example URL:
- win-2k8-epo50 — Is the name of the McAfee ePO server
- :8443 — Is the console-to-application server communication port number used by ePolicy Orchestrator.

The default is port number is "8443" unless you changed it.

Task
For option definitions, click ? in the interface.

1. Open any ePolicy Orchestrator supported Internet browser. See McAfee ePolicy Orchestrator 5.0.0 Software Installation Guide for a list of supported browsers.

2. In the browser address bar type either of the following, and click Enter:
   - https://<servername>:8443
   For example, https://win-2k8-epo50:8443

3. Log into ePolicy Orchestrator and you have established a remote console connection.

See the ePolicy Orchestrator 5.0.0 Scripting Guide for examples of expanded commands you can run from a remote console connection.
Frequently asked questions

Answers to frequently asked questions about ePolicy Orchestrator software are collected here.

Contents
- Policy management questions
- Event and response questions

Policy management questions

What is a policy?
A policy is a customized subset of product settings that correspond to a policy category. You can create, modify, or delete as many named policies as needed for each policy category.

What are the McAfee Default and My Default policies?
Upon installation, each policy category contains at least two policies. These are named McAfee Default and My Default. These are the only policies present for first-time installations. The configurations for both, initially, are the same.

The McAfee Default named policies cannot be edited, renamed, or deleted. The My Default policies can be edited, renamed, and deleted.

What happens to the child groups and systems of the group where I assigned a new policy?
All child groups and systems that are set to inherit the specific policy category, inherit the policy applied to a parent group.

How are the groups and systems where a policy is applied affected when the policy is modified in the Policy Catalog?
All groups and systems where a policy is applied receive any modification made to the policy at the next agent-server communication. The policy is then enforced at each policy enforcement interval.

I assigned a new policy, but it’s not being enforced on the managed systems. Why?
New policy assignments are not enforced until the next agent-server communication.
I pasted policy assignments from one group or system (source) to another (target), but the policies assigned to the target location are not the same as the source location. Why not?

When you copy and paste policy assignments, only true assignments are pasted. If the source location was inheriting a policy that you selected to copy, it is the inheritance characteristic that was pasted to the target, so the target then inherits the policy (for that particular policy category) from its parent, which might be a different policy than the one that was inherited onto the source.

Event and response questions

If I set up a response rule for virus detections, do I have to receive a notification message for each event received during an outbreak?

No. You can configure rules so that a notification can be sent only once per specified quantity of events within a specified amount of time, or sent at a maximum of once in a specified amount of time.

Can I create a rule that generates notifications to multiple recipients?

Yes. You can enter multiple email addresses for recipients in the Response Builder wizard.

Can I create a rule that generates multiple types of notifications?

Yes. Notifications for ePolicy Orchestrator supports any combination of the following notification targets for each rule:

- Email (including standard SMTP, SMS, and text pager)
- SNMP servers (via SNMP traps)
- Any external tool installed on the ePolicy Orchestrator server
- Issues
- Scheduled server tasks
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