Logging in for the first time and changing your password

1. Open your browser and go to **filtering.n4l.co.nz**

2. Using the login information sent to you via email, enter your username and temporary password and click **Login**.

   You will be asked to reset your password.

3. Enter your new password as instructed (you'll be asked to enter it twice), ensuring your password has:

   • At least 8 characters

   • At least one lowercase letter

   • At least one uppercase letter

   • At least 1 digit

   • At least one of the following characters: @#$%^&+=_-!:?

4. Click **Save**

   You will then be automatically redirected to your school's filtering dashboard homepage.

Adding users to the filtering dashboard

1. Contact N4L's Helpdesk by calling 0800 LEARNING, or by emailing support@n4l.co.nz

2. Provide the following information about the new user:

   • First & Last Names

   • Position

   • Phone number

   • Email

   • Access level required (see below)

The levels of access you can choose from are:

   • Full access

   • Read only

   • Full read only

   • HR

   • Admin (no forensic)

   • Report admin

You can also contact the N4L Helpdesk at any time to request the following:

   • Deactivate users when access is no longer required

   • Reset user passwords

   • Unlock users if they locked themselves out by entering the wrong password too many times

   • Delete users permanently

NB. Only the principal can request new administrators be added to your school's dashboard.

Viewing filters

1. Click on the **Web Filtering** tab

2. Go to the **Management** menu

3. Click on **Filters**

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N4L MANAGED NETWORK
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Creating new filters

Filter by Inbound filters

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Filters**
4. Click on the **Create Filter** tab
5. Type the name of the filter into the **Filter Name** field

Filter by Category

1. Click on **Categories**
2. Choose the categories you want to block by either:
   a. Clicking **Select All** then going through the list and unticking the ones you do not want to filter out; or
   b. Leaving all boxes unticked and going through the list and clicking only those you do want to filter
3. Click **Save**

Filter by Domains and URLs

1. Click on **Domains**
2. Apply filter by:
   a. Entering the IP address; or (e.g. 202.162.72.2)
   b. Typing in the domain name of the site (e.g. trademe.co.nz)
3. Click **Save**

Filter by Content Types

1. Click on **Content Types**
2. Select the type/s of content you want to filter by ticking the relevant boxes
3. Click **Save**

Filter by File Type

1. Click on **File Types**
2. Select the type/s of files you want to filter by ticking the boxes
3. Click **Save**

Once you have chosen all your inbound filters click **Save all Settings.**

Filtering by Bidirectional filters

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Filters**
4. Click on the **Create Filter** tab
5. Type the name of the filter into the **Filter Name** field

Filter by Application

1. Click on **Applications**
2. Specify which applications you want to filter by selecting:
   a. The category,
   b. The application name, or
   c. A specific activity you want to filter
3. Click **Save**

Filter by Exceptions

1. Click on **Exceptions**
2. Apply filter by:
   a. Entering the IP address; or (e.g. 202.162.72.2)
   b. Typing in the domain name of the site (e.g. trademe.co.nz)
3. Click **Save**

Filter by Protocols

1. Click on **Protocols**
2. Select to filter by:
   a. HTTP (public sites), or
   b. HTTPS (secure sites), or
   c. FTP over HTTP
3. Click **Save**

Filter by Custom User Agents

1. Click on **Custom User Agents**
2. Select the custom user agents you want to filter by:
   a. Ticking the boxes or
   b. Manually adding one in at the bottom
5. Click **Save**

Once you have set up all your bi-directional filters click **Save all Settings**.

Filtering by Outbound filters

When setting up outbound filters please ignore:

- File Matching
- Outbound File Types
- Preconfigured IDs
- Regular Expressions

Filter by Keywords

To filter by Keywords, you need to prepare a Dictionary first.

To prepare a Dictionary:

1. Click on the **Admin** tab
2. In the Management drop down menu select **Dictionaries**
3. Name the dictionary
4. Click **Add Dictionary**
5. To populate the dictionary, click on the dictionary title and either:
   a. Browse to locate a CSV file already saved to your computer, upload it and **Save**.
   b. Create a word list and manually add individual words to it, **Save**.

To filter:

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Filters**
4. Click on the **Create Filter** tab
5. Name the filter
6. Click on **Keywords**
7. Select the dictionary you want to apply
8. Click **Add**
9. Click **Save all Settings**

Editing existing filters

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Filters**
4. To access the edit function:
   a. Click the **Manage Filters** tab then click on the edit icon, or
   b. Click the **Edit Filter** tab and choose your filter from the drop down menu
5. Make changes to the filters as required
6. Click **Save all Settings**

Creating schedules

A schedule is used to decide when certain rules will apply.

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Schedules**
4. Click on **Create Schedule**
5. Name your schedule
6. Specify the start and finish times the filter applies during in the **From** and **To** fields
7. Select your **Time Zone**
8. Choose the days you want this schedule to apply to
9. Click **Create Schedule**

How to edit an existing schedule

1. Click on the **Web Filtering** tab
2. Go to the **Management** menu
3. Click on **Schedules**
4. To edit:
   a. Click the **Manage Schedules** tab and click on the edit icon, or
   b. Click the **Edit Schedule** tab and choose your schedule from the drop down menu
5. Click **Save**

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Creating rules

A rule is a combination of a filter and a schedule.

1. On the dashboard homepage click on the **Web Policy** icon
2. Click on **Create Rule**
3. Name the rule
4. Add a brief description
5. Specify the **Rule Action** you want to associate with the rule from the drop down menu
   a. Allow
   b. Anonymize
   c. Authenticate
   d. Block
   e. Warn
6. Specify who this rule will apply to in the **Define Group "WHO"** section
7. Specify which filter created will apply to this rule in the **Define Filters "WHAT"** section
8. Specify which schedule will apply in the **Define Schedule "WHEN"** section
9. Click **Create Rule**

Creating policy

Policy is the order in which your rules apply.

If one rule is above another, the rule above will take precedence over the rules below it.

To move the rules up or down in priority:

1. On the dashboard homepage click on the **Web Policy** icon
2. Move the rules by clicking on the arrows (in the **Move** columns)
3. Click **Apply Changes**

Viewing and Downloading predefined reports

1. Access Reports by
   a. Clicking on **Reports** icon, or
   b. Click on the **Reports** tab at the top of the screen

To view a report:

1. Choose your **Time Zone**
2. Specify the **Time Period** you want to report on by:
   a. Clicking on the **Time Period** drop down menu and choosing from the list
   b. Choosing **Custom** in the list and specifying the start and finish times you want to report on in the **From** and **To** fields
3. Choose the folder you want the report from
4. Choose how you want to view the report (**Grid, Bar** or **Columns**)
5. Click on the report title
6. If required, adjust the filters
7. Click **Launch Search**
8. Click on the tabs on the bottom of the screen to view the report in different formats (grid view, bar chart or column chart)
9. If required, download the report in the desired format (CSV or PDF) by clicking on the download icon.

Creating customised reports

1. Access **Reports** by
   a. Clicking on **Reports** icon, or
   b. Click on the **Reports** tab at the top of the screen
2. Click on **Reports** drop down menu and choose **Search**
3. On the **Search** page, you can select:
   a. **Search** tab
   b. **Time Analysis** tab
   c. **Detailed Search** tab

NB: Search and Time Analysis are the same

Standard report

1. In **Reports** click on **Search** or **Time Analysis**
2. Specify your **Time Zone** and the **Time Period** you want to report on by:
   a. Click on the **Time Period** drop down menu and choose from the list
   b. Choose **Custom** in the list and specify the start and finish times you want to report on in the **From** and **To** fields
3. Click **Add filter** (metric, attribute or filter set)
4. Add the filter specification based on option chosen
5. Add your **operator**
6. Add number
7. Click **Add**
8. Click **Launch Search**
9. If you want to run this report again in the future click **Save As** and name it
10. You can now view the report on your screen or download it as a CSV file

Detailed report

1. Click on **Detailed Search**
2. Specify your **Time Zone** and the **Time Period** you want to report on by:
   a. Click on the **Time Period** drop down menu and choose from the list
   b. Choose **Custom** in the list and specify the start and finish times you want to report on in the From and To fields
3. **Add filter** (metric, attribute or filter set)
4. Add the filter specification based on option chosen
5. Add your **operator**
6. Add number
7. Click **Add**
8. If you want to customise the report choose your attributes by clicking on the **Add/Remove Columns** link.
9. If you want to run this report again in the future click **Save As** and name it
10. You can now view the report on screen or download it as a CSV file

Creating, editing and deleting composite reports

1. Access Reports by
   a. Clicking on **Reports** icon, or
   b. Click on the **Reports** tab at the top of the screen
2. In the **Reports** drop down menu select **Composite Reports**
3. Click **Create Composite Reports**
4. Name the report
5. Select the information you want in that report from the list
6. Click **Add Report**
7. If required, change the order in which information is displayed by clicking on the report name and click on the arrows to move fields up and down, or click the Delete icon to remove a field
8. Click **Create Composite Report**

To download the report:

1. Go to **Manage Composite Reports** tab
2. Select the **Time Zone** by:
   a. Clicking on the **Time Period** drop down menu and selecting from the list
   b. Selecting **Custom** in the list and manually entering the **From** hours and the **To** hours
3. Click on the *Download* icon

The system will create a PDF copy of the report which you can view and/or save.

Editing Composite Reports

4. If required, you can edit already existing composite reports by clicking on the **Edit** icon or going to the **Edit Composite Reports** tab
5. Once you are happy with the changes, click **Save**

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Scheduling reports

Creating Email Groups

1. Click on the **Reports** tab
2. In the **Reports** drop down menu select **Recipients**
3. Name the new group
4. Click **Create New Group**
5. Click on the newly created group name
6. Enter in all email addresses this report should be sent to, clicking **Add Recipient** after each entry

*NB. You can also remove people by clicking the **delete** icon.*

Setting up Scheduled Reports

1. Click on the **Reports** tab
2. In the **Reports** drop down menu select **Scheduled Reports**
3. Click **Create Schedule Reports**
4. Name the schedule
5. Choose the day you want the report to run and send
6. Add the email group (previously created) that applies to this report
7. Enter
   a. The email subject (which will show in the subject line of the recipient's inbox), and
   b. Short message (that will show in the body of the email the recipient receives, stating the purpose and content of the attached report)
8. Select the report you want to schedule from the list
9. Create a password (all recipient/s will need to use this password to open the report)
10. Confirm the password
11. Click **Save Changes**

*NB. You can edit by clicking on the **Edit** tab or icon and delete by clicking the **Delete** icon.*

Checking application of settings

Tracing

To check your settings to ensure they are being applied as you set them up through filtering rules and policies, you can do a policy trace:

1. Open your internet browser on a computer that is configured for the filtering dashboard and go to **http://policytrace.scansafe.net**

2a. If the screen shows **"User is not currently using this service"** filtering is not enabled on the computer. You should contact N4L immediately and request that it be enabled.
   • by calling 0800 LEARNING, or
   • by emailing support@n4l.co.nz

2b. If the screen shows the "**Enter URL**" box below type the URL in the **Enter URL** box for the site you want to run a policy trace for, and click Go.
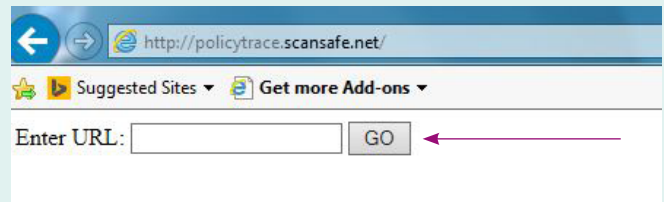
It will be displayed in the format shown below. It will show all the evaluations and in the last line the block or allow being applied based on which rule.

Access and Activity Audits

Access Audits

This audit will show all login attempts by users of your filtering dashboard.

1. Click on the **Admin** tab then on the **Audit** tab
2. Select **Access Audit**
3. Specify your **Time Zone** and the **Time Period** you want to audit
4. Specify which users you want to audit by selecting
   a. **All Admin**, or
   b. A specific user
5. Specify the type of login attempts you want to report on:
   a. **Successful**,
   b. **Unsuccessful**, or
   c. Both

Click **Generate Audit**

The system will create a CSV file which you can view and/or save.

Activity Audits

This audit will show all administrative activity that has occurred in your filtering dashboard.

1. Click on the **Admin** tab then click the **Audit** tab
2. Select **Activity Audit**
3. Select your **Time Zone** and the **Time Period** you want to audit
4. Specify which users you want to audit by selecting
   a. **All Admin** users, or
   b. A specific user
5. Specify the categories to audit by selecting
   a. **All Categories**
   b. A specific category
6. Specify the actions you want to audit by selecting
   a. **All Actions** or
   b. A specific action
7. Click **Generate Audit**

The system will create a CSV file which you can view and/or save.