Trellix Security for Microsoft Exchange 8.8.1 Product Guide

Contents

Introduction

Trellix Security for Microsoft Exchange protects your Microsoft Exchange servers from various threats that could adversely affect the computers, network, or employees.

TSME uses advanced heuristics against viruses, unwanted content, potentially unwanted programs, and banned file types or messages. It also scans:

- Subject line and body of the email messages
- Email attachments (based on file type, file name, and file size)
- Text within the email attachments
- URLs in the email body

Key features

The main features of **TSME** are described in this section.

- **Trellix® Threat Intelligence Exchange (TIE) integration for file reputation check** — Supports **TIE** file reputation check for email attachments. It quickly analyzes files and makes informed decisions by validating the file reputation based on the information received from several sources connected to the **TIE** server in your environment. When the email contains a compressed file, the files are extracted and the supported types of files are sent for **TIE** reputation. For the list of supported compressed files, see KB89577.
- **Trellix Intelligent Sandbox TIE reputation check for files** — **TSME** now supports **Intelligent Sandbox**, an on-premise appliance that facilitates detection and prevention of malware through **TIE**. With **Intelligent Sandbox** protection, you can protect your systems from known, near-zero day, and zero-day malware without compromising on the quality of service to your network users.
- **Protection from Email spoofing** — Protects your systems from spoofing emails.
- **Exclude large emails from scanning** — You can now exclude emails from on-access scanning based on the size of an email.
- **Block emails from specific IP addresses** — You can now blacklist a specific IP address, or range of IP addresses, from sending emails to your organization regardless of the IP address reputation score.
- **Browser enhancements** — Microsoft Internet Explorer 11, Mozilla Firefox 74.0, and Google Chrome 80.

Note

Make sure that you disable the pop-up blocker in the browser settings to access the product web interface.

Other features

- **Protection from viruses** — Scans all email messages for viruses and protects your Exchange server by intercepting, cleaning, and deleting the viruses that it detects. **TSME** uses advanced heuristic methods and identifies unknown viruses or suspected virus-like items and blocks them.
- **Filtering file types when enabling TIE** — This feature enables you to filter the different file types when enabling TIE.

- **Rescanning of files** — Enables you to resubmit files for scanning during scan failures.
- **Protection from malicious URLs** — Protects your system from malicious URLs. When enabled, **TSME** scans each URL in the email body, gets the reputation score of the link, compares the score with the defined threshold, and takes appropriate action according to the configuration.
- **Capability to detect packers and potentially unwanted programs** — Detects packers that compress and encrypt the original code of an executable file. It also detects potentially unwanted programs (PUPs), that are software programs written by legitimate companies to alter the security state or privacy state of a computer.
- **Content filtering** — Scans content and text in the subject line or body of an email message and an email attachment. **TSME** supports content filtering based on regular expressions (regex).
- **File filtering** — Scans an email attachment depending on its file name, type, and size of the attachment. **TSME** can also filter files containing encrypted, corrupted, password-protected, and digitally signed content.
- **DLP and compliance** — Ability to ensure that email content is in accordance with your organization's confidentiality and compliance policies. Pre-defined compliance dictionaries include:

  - Addition of 60 new DLP and Compliance dictionaries
  - Support for industry specific compliance dictionaries — HIPAA, PCI, Source Code (Java, C++ etc.)
  - Improvements to existing phrase based detections.
  - Reduced false positives, due to enhanced capabilities in detecting non-compliant content, based on the Threshold score and in combination with the maximum term count (occurrence).

  Customize policies for content security and Data Loss Prevention (DLP).
- **IP reputation** — A method of detecting threat from email messages based on the sending server's IP address. IP Reputation Score reflects the likelihood that a network connection poses a threat. IP reputation leverages on **Trellix Global Threat Intelligence** to prevent damage and data theft by blocking the email messages at the gateway based on the source IP address of the last email server. **TSME** processes the message before it enters the organization by rejecting or dropping the connection based on the IP reputation score.
- **Advanced on-demand scan** — Ability to perform granular-level on-demand scan on Exchange Server 2013, 2016, and 2019 resulting in faster on-demand scans. You can schedule on-demand scans based on these filters; Subject, Attachments, Sender/Recipient/CC, Mail Size, Message ID, Unread items, and Time duration.
- **Continuity Scan** — You can schedule on-demand scanning for the past 365 days using weeks, months, and days filters. For example, if you want to scan items for the past 28 days, enable **Continuity scan** checkbox and add 28 in the **Scan from past days** drop-down column.
- **Background scanning** — Facilitates scanning of all files in the information store. You can schedule background scanning to periodically scan a selected set of messages with the latest engine updates and scanning configurations. In **TSME**, you can exclude mailboxes that you don't want to be scanned.
- **Product Health Alerts** — These are notifications on the status of the product's health. You can configure and schedule these alerts.
- **Integrate with Trellix ePolicy Orchestrator - On-prem** — Integrates with **Trellix ePolicy Orchestrator - On-prem** to provide a centralized method for administering and updating **TSME** across your Exchange servers. This reduces the complexity of administrating and updating various systems.
- **Web-based user interface** — Provides a user-friendly web-based interface based on DHTML.
- **Policy Management** — The **Policy Manager** menu option in the product user interface lists different policies you can set up and manage in **TSME**.

- **Centralized scanner, filter rules, and enhanced alert settings** — Using scanners, you can configure settings that a policy can apply when scanning items. Using File Filtering rules, you can set up rules that apply to a file name, file type, and file size.
- **On-demand/time-based scanning and actions** — Scans email messages at convenient times or at regular intervals.
- **Multipurpose Internet Mail Extensions (MIME) scanning** — A communications standard that enables you to transfer non-ASCII formats over protocols (such as SMTP) that support only 7-bit ASCII characters.
- **Quarantine management** — You can specify the local database to be used as a repository for quarantining infected email messages.
- **Auto-update of virus definitions, Extra DATs, and anti-virus engine** — Regularly provides updated DAT files and anti-virus scanning engine to detect and clean the latest threats.
- **Retention and purging of old DATs** — Retain old DAT files for periods you define or purge them as needed.
- **Support for Site List editor** — Specify a location from which to download automatic updates for **TSME**.
- **Support for Small Business Server** — **TSME** is compatible with Small Business Servers.
- **Detection reports** — Generates status reports and graphical reports that enable you to view information about detected items.
- **Configuration reports** — Summarizes product configuration such as information about the server, version, license status and type, product, debug logging, on-access settings, and on-access policies. You can specify when your server needs to send the configuration report to the administrator.
- **Denial-of-service attacks detection** — Detects additional requests or attacks flooding and interrupting the regular traffic on a network. A denial-of-service attack overwhelms its target with false connection requests, so that the target ignores legitimate requests. **TSME** considers these three scenarios as Denial-of-service attacks:
  - Scanning time exceeds the defined time
  - Nested level exceeds the defined level
  - Expandable file size limit for archived files exceeds the defined size
- **Advanced notifications** — Forward the quarantined emails for compliance audit to multiple users, based on the detection category.
- **File Filtering Rules for password-protected files** — This feature enables you to separately apply **File Filtering Rules** for both password-protected files and non password-protected files.
- Support for VMware workstation 7.0 or later, and VMware ESX 5.5.
- Support for Microsoft Exchange 2013, 2016, and 2019.
- **Important**: VSPAI scanning is not applicable from Exchange Server 2013 and later.
- Support for proprietary function of InstallShield.
- **Support for RAR5 files** — Supports scanning of RAR5 files in email attachments.

Why do you need TSME

Your organization is vulnerable to many threats that can affect its reputation, employees, computers, and networks.

- The reputation of an organization can be affected by the loss of confidential information or through an abuse that can lead to legal action.
- Electronic distractions and unrestricted use of email and the Internet can affect the productivity of employees.
- Viruses and other potentially unwanted software can damage computers, making them unusable.

- Uncontrolled use of various types of files on your networks can cause performance problems for your entire organization.

Threats to your organization

Learn about various threats that could affect an organization.

Type of threat	Description
Reputation of a company	An unguarded or ill-informed remark by an employee might cause legal problems, unless it is covered by a disclaimer.
Large email messages	Large email messages or messages that contain numerous attachments can slow down the performance of email servers.
Mass-mailer viruses	Although they can be cleaned like any other virus, they can spread rapidly and quickly degrade the performance of your network.
Email messages from unwanted sources	Disgruntled ex-employees and unscrupulous individuals who know the email addresses of your employees can cause distress and distraction by sending unwanted emails.
Non-business use of email	If most employees use recipient email addresses not within their organization, such emails are likely to be for personal or non-business use.
Loss of company-confidential information	Employees might disclose confidential information related to unreleased products, customers or partners.
Offensive language	Offensive words or phrases can appear in email messages and attachments. Besides causing offense, they can provoke legal action too.

Type of threat	Description
Transfer of entertainment files	Large video or audio files intended for entertainment might reduce your network performance.
Inefficient file types	Some files use large amounts of memory and can be slow to transfer, but alternatives are often available. For example, GIF and JPEG files are much smaller than their equivalent BMP files.
Transfer of large files	Transferring large files can reduce your network performance.
Denial-of-service attack	A deliberate surge of large files can seriously affect the performance of your network, making it unusable to its legitimate users. While scanning large size compressed files, **TSME** considers three parameters for DOS attack: • Scanning time for compressed files exceeds the threshold. • The nested levels of compressed files are identified. For example, a compressed .zip file contains another compressed files inside, and continues expanding with more compressed files. • The expandable size limit of archived files exceeds the threshold.
Pornographic text	Vulgar language or terms must not be used in emails.
Viruses and other potentially unwanted software	Viruses and other potentially unwanted software can quickly make computers and data unusable.
Corrupt or encrypted content	This type of content cannot be scanned. Appropriate policies must be specified to handle it.

How TSME protects your Exchange Server

Learn how TSME protects your exchange server by accessing all email messages that reach the exchange server, and emails that are read from and written to the mailbox.

Protecting your Microsoft Exchange server

TSME uses the virus scanning interface of your Exchange server to gain full access to all email messages that are being read from, and written to the mailbox of the Exchange server.

- The anti-virus scanning engine compares the email message with all the known virus signatures stored in the DATs.
- The content management engine scans the email message for banned content as specified in the content management policies in **TSME**.

If these checks find any viruses or banned content within the email message, **TSME** takes the specified action. If no items are detected, **TSME** passes the information back to the virus-scanning interface to complete the original message request within Microsoft Exchange.

Real-time detection

TSME integrates with your Exchange server and works in real time to detect and delete viruses or other harmful or unwanted code. It also helps you maintain a virus-free environment by scanning the databases on your Exchange server. Each time an email message is sent to or received from a source, **TSME** scans the email message to compare it with a list of known viruses and suspected virus-like behavior and intercepts and cleans the infected file before it spreads. It can also scan content within the email message (and its attachments), using rules and policies defined in the software.

Scanning of email messages

- The anti-virus and the content management engines scan the email messages and provide the result to **TSME** before the content is written to the file system or read by the Microsoft Exchange users.
- The anti-virus scanning engines compare the email message with all the known signatures stored in the currently installed virus definition files (DATs). The anti-virus engine also scans the message using selected heuristic detection methods.
- The content management engine scans the email message for banned content as specified in the content management policies running within the software. If there are no viruses, banned/unwanted content in the email message, **TSME** passes the information back to Microsoft Exchange. In case of a detection, **TSME** takes actions as defined within its configuration settings.

How scanning works

- Central to your **TSME** are the scanning engine and DAT files. The engine is a complex data analyzer. The DAT files contain a great deal of information including thousands of different drivers, each of which contains detailed instructions on how to identify a virus or a type of virus.
- The scanning engine works with the DAT files. It identifies the type of the item being scanned and decodes the content of that object to understand what the item is. It then uses the information in the DAT files to search and locate known viruses. Each virus has a distinctive signature. There is a sequence of characters unique to a virus and the engine searches for that signature. The engine uses a technique called heuristic analysis to search for unknown viruses. This involves analyzing the object's program code and searching for distinctive features typically found in viruses.

- Once the engine has confirmed the identity of a virus, it cleans the object to the extent possible. For example, it removes an infected macro from an attachment or deletes the virus code in an executable file.

What and when to scan?

- The threat from viruses can come from many directions such as infected macros, shared program files, files shared across a network, email messages and attachments, floppy disks, files downloaded from the Internet, and so on. Individual **Trellix** Security anti-virus software products target specific areas of vulnerability. We recommend a multi-tiered approach to provide the full range of virus detection, security, and cleaning capabilities that you require.
- **TSME** provides a range of options that you can further configure according to the demands of your system. These demands will vary depending on when and how the component parts of your system operate and how they interact with each other and with the outside world, particularly through emails and Internet access.
- You can configure or enable various actions that allow you to determine how your **TSME** server should deal with different items and what actions it should take on detected or suspicious items.

How emails are scanned

TSME scans an email differently based-on whether it is an inbound, outbound, or internal email.

Each time an email message is sent to or received from a source, **TSME** scans it comparing it with a list of known viruses and suspected virus-like behavior. **TSME** can also scan for content within the email message using rules and policies defined within the software.

When **TSME** receives an email, it scans in this order:

1. IP address reputation
2. Anti-spoof
3. Corrupt or encrypted content
4. File filter
5. Content scanning (DLP and Compliance)
6. Anti-virus
7. Mail URL reputation

Even though emails are scanned in this order, if an item is detected first by the file filtering scanner, it will still be scanned for anti-virus before being quarantined.

Scanning inbound emails

Step-by-step information on what happens to an email that reaches your organization and how TSME scans it to determine if the email is clean or infected.

The process described below is narrated assuming a situation in your organization where you have installed TSME on all these roles.

Microsoft Exchange Server 2013, 2016, and 2019:

- Edge Transport
- MBX

Task

1. The SMTP stack hosted by EdgeTransport.exe on Edge role receives the email.
2. TSME IP Agent (McTxIPAgent) checks for the source IP address reputation. The IP Agent check is executed before TxAgent operations.
3. TSME Transport Agent (McAfeeTxAgent) scans the email for mail size.
4. If there is detection, it is dropped, else it is returned to the SMTP stack.
5. If the email is clean, McAfeeTxRoutingAgent processes it.
6. TSME receives the same stream and scans for File filtering, Content scanning, Anti-virus (AV) scanning, and URL filtering.
7. If there is a detection, action is taken as per product configuration.
8. TSME stamps the email with AV stamp as per Microsoft specifications.
9. TSME Transport Agent (McAfeeTxAgent) scans the email for mail size. Only in case of EdgeSync (Edge server), the session is authenticated. In this case, Originator check is used for session authentication.
10. If there is detection, the email is dropped, else it is returned back to the SMTP stack.
11. If the email is clean, McAfeeTxRoutingAgent processes it and checks for AV stamp (if any).
12. If the stamp is different, TSME receives the same stream and scans for File filtering, Content scanning and Anti-virus scanning.
13. If there is a detection, an action is taken as per product configuration.
14. TSME stamps the email with AV stamp as per Microsoft specifications.
15. The email is routed to Exchange Mailbox server role.
16. Exchange store receives the mail and before saving it to its database, checks for the AV stamp.
17. If AV stamp matches, it saves the item without scanning.
18. If there is detection, the email is replaced or deleted as per product configuration.

Note

For Microsoft Exchange server 2013, 2016, and 2019, the mailbox roles are not applicable.

Scanning outbound emails

Step-by-step information on what happens to an email that goes out of the organization and how TSME scans it, to determine if the email is clean or infected.

Task

1. The end-user sends an email to an external user, using the email client.
2. Exchange store receives the email and scans it in the Outbox folder.
3. If there is detection, it is replaced or deleted as per the product configuration and if replaced it is submitted to Transport queue.
4. SMTP stack hosted by EdgeTransport.exe on MBX roles, receives the email.
5. TSME Transport Agent (McAfeeTxRoutingAgent) scans the email for File filtering, Content scanning, Anti-Virus scanning, URL reputation, and also disclaimer addition.

6. **If there is detection, it is dropped or replaced and appropriately returned to the SMTP stack.**
7. **If the email is clean, it is returned to SMTP stack for further routing.**
8. **Now the email is returned to SMTP stack, hosted by EdgeTransport.exe on Edge server role for further routing.**

Scanning internal emails

Step-by-step information on what happens to an email that is sent within the organization and how TSME scans it, to determine if the email is clean or infected.

Task

1. **The end-user sends an email to an internal user, using the email client.**
2. **For Exchange Server 2013, 2016, and 2019, the emails are directed to the Transport queue from the Outbox folder.**
3. **If there is detection, it's replaced or deleted as per the product configuration and if replaced it is submitted to Transport queue.**
4. **TSME Transport Agent (McAfeeTxRoutingAgent) scans the email for File filtering, Content scanning, then Anti-virus scanning.**
5. **If there is detection, it is dropped or replaced and appropriately returned to the SMTP stack.**
6. **If the email is clean, it is returned to SMTP stack for further routing.**
7. **The Exchange Mailbox server receives the email.**

Dashboard

Dashboard organizes and presents information in a way that is easy to read and interpret.

The **TSME** dashboard provides critical information on how well your server is being protected from viruses, potentially unwanted programs, malicious URLs, and unwanted content. It also provides information about the detection statistics; additional components installed in the product; version information of components such as engine and DAT files; product license information and recently scanned items.

Statistical information of detected items

Provides detailed information on the total emails scanned by TSME, how many emails triggered the detection and are quarantined based on the detection category. The dashboard also provides this statistical information in the form of a graph, for easy interpretation, and monitor the detection rates.

The **Statistics** tab is categorized into these sections:

- **Detections**
- **Scanning**
- **Graph**

Note

Clicking **Reset** will clear the statistical information of all counters in the **Detections** section and reset the value to zero. Resetting the statistics will not delete any quarantined items from the **Detected Items**. These counters are dependent on the database path, so if you change the database path under **Settings & Diagnostics** → **Detected Items** → **Local Database**, the counters will reset to zero.

To modify the dashboard settings such as the refresh rate; maximum items to appear in the **Recently Scanned Items**; graph scale units; graph and chart settings such as the 3D pie-chart, exploded pie-chart, transparency, go to **Settings & Diagnostics** → **User Interface Preferences**.

Detections

Displays all statistical information on how many emails scanned by **TSME** are clean and how many items triggered a detection. Based on the detection category, the respective counter is incremented.

The reported numbers indicate the number of emails and documents that trigger any of the detection methods. For example, if an email contains two virus attachments, the statistics for **Viruses** would be incremented by one and not two. Reporting statistics are based on email messages rather than individual files or detections and is more intuitive in a mail server environment.

Note

If your **TSME** server is managed by **ePolicy Orchestrator - On-prem** and if you restart the service or click the **Reset** button, these statistics vary in **Trellix ePO - On-prem** reports due to the historical data stored in **Trellix ePO - On-prem**. For more information on **Trellix ePO - On-prem** reports, see *Integrating **TSME** with **ePolicy Orchestrator - On-prem***.

Icons used — Detections section

Icon	Description
⧉	Provides additional information on the detection category when you place the cursor on the icon.
🖼	Indicates that the statistics of the respective detection category is available in the graph.
🖼	Indicates that the statistics of the respective detection category is unavailable in the graph.

Tip

The graphical icons 🖼 and 🖼 appear only when the **<Select Detections>** option is selected from the **Graph** drop-down list.

The following table provides you more information on each detection category.

Detection definitions

Category	Additional information	Description
Clean	**Tip:** If the email flow has more clean emails than the detections, enabling this 🖼 icon for clean emails might suppress the graph of other categories. In such scenarios, disable the 🖼 icon next to **Clean** category.	Legitimate email messages that do not pose a threat to the user and does not trigger any of the **TSME** scanners.
Spoofed Mails	**SPF Hard Fail detected**	Emails that are identified as Hard Fail spoofed mails.

Category	Additional information	Description
	SPF Soft Fail detected	Emails that are identified as Soft Fail spoofed mails.
IP Reputation		A method of detecting threat from email messages based on the sending server's IP address. IP reputation score reflects the likelihood that a network connection poses a threat. IP reputation leverages on **Trellix Global Threat Intelligence** (GTI) to prevent damage and data theft by blocking the email messages at the gateway based on the source IP address of the last email server. **TSME** processes the message before it enters the organization by rejecting or dropping the connection based on the IP reputation score.
	IP Encountered	All emails that reach the **TSME** server.
	IP Dropped	Emails that were quarantined by **TSME** due to IP reputation feature. In this case, the sender is not notified about the email delivery status.
	IP Rejected	Emails that were quarantined by **TSME** due to IP reputation feature. In this case, the sender will be notified about the email delivery status.
Viruses		A computer program file capable of attaching to disks or other files

Category	Additional information	Description
		and replicating itself repeatedly, typically without user knowledge or permission. Some viruses attach to files, so when the infected file executes, the virus also executes. Other viruses sit in a computer’s memory and infect files as the computer opens, modifies, or creates files. Some viruses display symptoms, others damage files and computer systems, but neither is essential in the definition of a virus; a non-damaging virus is still a virus.
	Viruses detected	Virus which is detected in an incoming email and an appropriate action is taken based on the policy settings.
	Viruses cleaned	Virus which is removed from an incoming email and an appropriate action is taken based on the policy settings.
TIE and ATD Detections	**File reputations**	Supported file type attachments sent to the TIE server for the file reputation check.
	Certificate reputations	Signed and supported file type attachments sent to the TIE server for the certificate reputation check.
	ATD submissions	Supported file type attachments sent to the ATD server for a reputation check based on your acceptance category and file size.

Category	Additional information	Description
	Total TIE detections	Supported file type attachments reputation verified by TIE.
Potentially Unwanted Programs		Potentially Unwanted Programs (PUP) are software programs written by legitimate companies that could alter the security or privacy policies of a computer on which they have been inadvertently installed. These programs could be downloaded along with a legitimate application that you might require.
	PUP detected	PUP which is detected in an incoming email and an appropriate action is taken based on the policy settings.
	PUP blocked	PUP which is removed from an incoming email and an appropriate action is taken based on the policy settings.
Banned File types and Messages		Certain types of file attachments are prone to viruses. The ability to block attachments by file extension is another layer of security for your mail system. Both internal and external email messages are checked for banned file types or messages.
	Banned file types	Certain types of file attachments are prone to viruses. The ability to block attachments by file

Category	Additional information	Description
		extension is another layer of security for your mail system.
	Banned messages	Certain email messages that you wish to ban from going through your mail system. Both internal and external mail are checked for banned content.
DLP and Compliance	**Note:** To view available dictionaries, click the **Category** drop-down list from **Policy Manager** → **Shared Resource** → **DLP and Compliance Dictionaries**.	Stop the loss of sensitive information via email. **TSME** provides industry-leading email content analysis to provide the tightest control of sensitive content in any form to aid compliance with many state, national, and international regulations. Prevent data leakage with the most extensive email Data Loss Prevention (DLP) in the industry that does pattern matching to detect data; policy-based message handling that prevents outbound data loss.
Unwanted Content		Unwanted Content is any content that the user would not like to receive through emails. The rules can be defined by certain words or phrases which would trigger a corresponding policy and block the email.
	Packers	A packed executable that decompresses and/or decrypts itself in memory while it is running, so that the file on disk is never similar to the memory image of the file. Packers are

Category	Additional information	Description
		specially designed to bypass security software and prevent reverse engineering.
	Encrypted/Corrupted content	Email messages that cannot be categorized as having encrypted or corrupted content.
	Encrypted content	Some email messages can be encrypted, which means that the content of those email messages cannot be scanned. Encrypted content policies specify how encrypted email messages are handled when detected.
	Signed content	Whenever information is sent electronically, it can be accidentally or willfully altered. To overcome this, some email software uses a digital signature - the electronic form of a handwritten signature. A digital signature is extra information added to a sender's message, that identifies and authenticates the sender and the information in the message. It is encrypted and acts like a unique summary of the data. Typically, a long string of letters and numbers appear at the end of a received email message. The email software then re-examines the information in the sender's message, and creates a digital signature. If that signature is identical to the original, the data has not been altered.

Category	Additional information	Description
		If the email message contains a virus, bad content, or is too large, the software might clean or remove some part of the message. The email message is still valid, and can be read, but the original digital signature is 'broken'. The recipient cannot rely on the contents of the email message because the contents might also have been altered in other ways.
	Corrupted content	The content of some email messages can become corrupt, which means that the content of the email message cannot be scanned. Corrupt content policies specify how email messages with corrupt content are handled when detected.
	Denial of service	A means of attack against a computer, server, or network. The attack is either an intentional or an accidental by-product of instruction code that is either launched from a separate network or Internet-connected system, or directly from the host. The attack is designed to disable or shut down the target, and disrupts the system's ability to respond to legitimate connection requests. A denial-of-service attack overwhelms its target with false connection requests, so that the target ignores legitimate requests.

Category	Additional information	Description
	Protected content	The content of some email messages is protected, which means that the content of the email message cannot be scanned. Protected content policies specify how email messages with protected content are handled when detected.
	Password protected files	It is possible to password protect a file that is sent by email. Password-protected files cannot be scanned. Password-protected file policies specify how email messages that contain a password-protected file are handled.
	Incomplete MIME messages	Multipurpose Internet Mail Extensions (MIME) is a communications standard that enables the transfer of non-ASCII formats over protocols, like SMTP, that only support 7-bit ASCII characters. MIME defines different ways of encoding the non-ASCII formats so that they can be represented using characters in the 7-bit ASCII character set. If the content in the body of a MIME message is too large to pass through the mail transfer system, the body can be passed as a number of smaller MIME messages. These MIME messages are known as partial or incomplete MIME messages, because each MIME message

Category	Additional information	Description
		contains only a fragment of the total message that must be transmitted.
Mail URL Reputation	**URLs detected**	Suspicious URLs in emails detected by URL Reputation with URL Reputation score added on the email headers.

Schedule a software update

Keep your software up-to-date with the latest anti-virus DAT, anti-virus engine, and extra drivers by scheduling an automatic update.

Note

By default the product update occurs based on the repository settings specified in **SiteList Editor**. To change the repository settings, use **SiteList Editor** from **Start** → **McAfee** option. However, if your computer is managed by an **ePolicy Orchestrator - On-prem** server, the product update will occur based on the settings provided in **ePolicy Orchestrator - On-prem**.

Task

1. **Click Dashboard → Statistics & Information.**
2. **From the Versions & Updates section, click Update Information tab.**
3. **From Update Frequency, click Edit Schedule.**

   The **Edit Schedule** page appears.
4. **From Choose a time, select an option depending on the required software update frequency.**

   Tip

   As a best practice, schedule a daily update, by selecting **Days** and specifying 1 under **Every day(s)** text box. Perform software updates during non-business hours or when the network traffic is low.
5. **Click Save, then Apply.**

Results

You have now successfully scheduled a software update.

On-Demand scan and its views

An on-demand scanner is a security scanner that you start manually at convenient times or regular intervals. It allows you to set various configurations and scan specific mails or mailboxes.

TSME enables you to create scheduled on-demand scans. You can create multiple schedules, each running automatically at predetermined intervals or times.

You can schedule regular scan operations when the server activities are comparatively low and when they do not interfere with your work.

Note

This feature is available only on an Exchange server that has Mailbox role. You cannot schedule an on-demand scan on an Exchange server that has only Edge Transport.

When should you perform an on-demand scan

An on-demand scan is highly recommended if there is an outage in your organization due to malicious activity. This will make sure that the Microsoft Exchange databases are clean and are not infected during the outage.

Trellix recommends that you perform an on-demand scan task during non-business hours. When an on-demand scan task is scheduled during a non-business hour and it continues during peak work hours, you must reconsider the databases being scanned and create with alternate schedules by altering the data being scanned.

You can schedule an on-demand scan during the weekends to make sure that the Exchange Databases are clean and older emails are also scanned by the latest Anti-Virus signatures. Administrators must schedule an on-demand scan keeping in mind the number of Exchange servers, databases, and mail flow. Your goal must be to complete this task before business hours.

Why perform an on-demand scan?

You might want to perform an on-demand scan for a number of reasons. For example:

- To check a specific file or files that has been uploaded or published.
- To check that the messages within your Microsoft Exchange server are virus-free, possibly following DAT update, so that new viruses can be detected.
- If you have detected and cleaned a virus and want to check that your computer is completely clean.

View on-demand scan tasks

View a list of on-demand scan tasks configured for TSME.

Task

Click Dashboard → On-Demand Scans. The On-Demand Scans page appears listing the configured on-demand scan tasks.

Note

By default, a scheduled on-demand scan task named **Default Scan** is created when TSME is installed.

From the **On-Demand Scans** page, you can use these options:

Option definitions

Option	Definition
Name	Indicates the name of the on-demand scan task.
Status	Indicates the current status of the on-demand scan task on whether the task is **Idle**, **Running**, **Stopped** or **Completed**.
Last Run	Indicates the date and time, when the on-demand scan was last executed.
Next Run	Indicates the date and time, when the next on-demand scan is scheduled to run.
Action	Lists these options for all the available on-demand scan tasks: • **Modify** • **Delete** • **Run Now** • **Show Status** The **Stop** option appears only if any on-demand scan task is running.
Modify	Edit the settings of an on-demand scan task.
Delete	Deletes the selected on-demand scan task.
Run Now	Starts the selected on-demand scan task immediately. **Note:** Run Now is applicable only after you create and apply an unscheduled on-demand scan task.

Option	Definition
Show Status	Displays the current status of an on-demand scan task. The **Task Status** page appears with these tabs: • **General** — Provides more information on the on-demand scan task such as the total running time of the task, progress of the task, DAT and Engine version used for scanning, scan results, total items scanned, rules broken and folders scanned. • **Settings** — Provides more information on the database scanned and the policy used. **Note:** The **Show Status** option is available only after an on-demand scan task is started.
Stop	Stops an on-demand scan task that is running.
Refresh	Refresh the page with latest on-demand scan information.
New Scan	Schedule a new on-demand scan task.

Results

You have now successfully viewed all available on-demand scan tasks configured for TSME.

Create on-demand scan task

Schedule an on-demand scan task to find or remove viruses and banned content in mailboxes, at convenient time intervals.

Before you begin

Make sure that you do not remove the **MSMEODuser** from active directory, that was created during the product installation. This user is required for performing on-demand scans on mailboxes.

Task

- **Click Dashboard → On-Demand Scans. The On-Demand Scans page appears.**
- **Click New Scan. The Choose when to scan page appears.**
- **From Choose a time tab, specify when you want the scan to run. The available options are:**
    - **Not scheduled** — Select this if you have not decided on when to perform the on-demand scan or disable the schedule for an existing on-demand scan.
    - **Once** — Specify the date and time to schedule an on-demand scan once.

  - **Hours** — Select this to schedule the task based on hours, if you have to execute the on-demand scan task for more than once in a day. For example, let's consider that the current time is 14:00 hours and you have to create an on-demand scan task that satisfies these conditions:
    - The on-demand scan must start exactly at 14:30 hours
    - The on-demand scan must occur twice a day

    To achieve this, specify 12 for hours and 30 for minutes.
  - **Days** — Select this to schedule the task based on how often the scan must occur in a week. For example, if you want the on-demand scan to occur once in three days, specify 3 under **day(s)** and select the time when the task starts.
  - **Number of Weeks** — Select this to view the items scanned for the past n number of weeks. For example, to view the files scanned by the on-demand scan for the last 8 weeks, type 8 under **Number of Weeks**.
  - **Number of Months** — Select this to view the items scanned for the past n number of months. For example, to view the files scanned by the on-demand scan for the last 4 months, type 4 under **Number of months**.

Note

Enable **Stop task after it has run for** <n> **hour(s)** <n> **minute(s)**, to stop an on-demand scan task if it exceeds the specified hours.

- **Click Next. The Choose what to scan page appears. The available options are:**
  - **Scan all folders** — Select this to scan all the mailboxes in the Exchange server.
  - **Scan selected folders** — Select this to scan only specific mailboxes in the Exchange server.
  - **Scan all except selected folders** — Select this to scan all except specific mailboxes that are added to the **Folders to scan** list.

Note

In Microsoft Exchange 2013, 2016, and 2019, the public folder appears as part of the mailbox and on-demand scanning is always recursive for public folders.

- **Click Next. The Configure scan settings page appears.**
- **From the Policy to use drop-down list, select any of the policy option based on your scan requirement.**

  The settings and actions to take are specified in on-demand policies found under **Policy Manager**.

- **Select the Resumable Scanning and Restart from last item options to run the on-demand scan task in multiple sessions on mailbox database.**

Tip

Sometimes, you might want to run an on-demand scan task for all mailboxes. Scanning all mailboxes in one session might take longer time and that can affect the system's productivity. Instead of scanning all mailboxes in one session, you can schedule the scan for multiple sessions.

- **On Exchange Server, you now have the option to perform a granular on-demand scan task. You can narrow down the scan using these fields:**

Option	Definition
Subject contains	
From contains	
To contains	
Message ID	
Recipients contains	
Items received	Select this option to scan items for a specific period. **Number of weeks:** Select the number of weeks to perform scan. **Number of Months:** Select the number of months to perform scan. **From:** Select the starting date for which you want to perform scan. **To:** Select the date to which you want to perform scan.
Continuity scan	Scans items for the past one year using any of these filters. **Scan for past weeks** **Scan for past months** **Scan for past days**
Mail Size	Used this to scan items based on file size. **From:** Select the minimum size of files. **To:** Select the maximum size of files.

Option	Definition
Items with attachment	
Unread items	

Performing a granular on-demand scan saves you time and fetches specific scan results.

- **Click Next. The Enter a name for the scan page appears.**
- **Specify a meaningful on-demand scan task name, based on the policy you selected in the previous page. For example, if you are creating an on-demand scan task to do a full scan over the weekend, specify the task name as** Weekend Full Scan**.**
- **Click Finish, then Apply.**

Results

By performing these steps, you have successfully created an on-demand scan task.

Status reports

A status report is a scheduled report sent to an administrator at a specific time. The report contains detection statistics within that specified time frame.

Using **Status Reports**, you can automate the task of querying for statistics periodically. You can schedule a periodic task for collecting the simple statistics like the number of detections on a particular date and send an email to the Exchange administrator or a distribution list.

These reports can help you to find out which Exchange servers are receiving more threats, using which you can come up with mechanisms to reduce the threat landscape.

You can choose a time, recipient email address or distribution list to send the report to, and a subject for the email. Status reports are sent to the recipient in HTML or CSV format.

Based on your configuration, the status report email contains statistical information on the detected items such as viruses, IP reputation, PUP, banned file types, unwanted content, DLP and compliance, clean emails and total number of emails scanned. For more information on how to schedule a status report, see *Schedule a new status report*.

Note

After installing TSME, status reports require at least 24-hour interval to populate the statistics in the notification email.

View status report tasks

View a list of status report tasks configured for **TSME**.

Task

Click Dashboard → Status Reports. The Status Reports page appears listing the configured status report tasks.

From the **Status Reports** page, you can use these options:

Option definitions

Option	Definition
Name	Indicates the name of the report task.
Status	Indicates the status of the report task, whether the task is **Idle**, **Running**, **Stopped**, or **Completed**.
Last Run	Indicates the date and time, when the report task was last executed.
Next Run	Indicates the date and time, when the next report task is scheduled to run.
Action	Lists these options for all the available report tasks: • **Modify** • **Delete** • **Run Now** • **Show Status** The **Stop** option appears only if any report task is running.
Modify	Click **Modify** to edit the settings of an on-demand scan task.
Delete	Deletes the selected report task.
Run Now	Starts the selected report task immediately.
Show Status	Displays the status of a report task. The **Task Status** page has this tab: • **General** — Provides more information on the report task such as the start and end time, task runtime, current action, and task progress.

Option	Definition
	Note: The **Show Status** option is available only after a report task is started.
Refresh	Refresh the page with latest report information.
New Report	Schedule a new status report task.

Results

You have now successfully viewed all available status report tasks configured for **TSME**.

Schedule a new status report

Schedule a new status report task to send the detection statistics to a specific email address or distribution list, at convenient time intervals.

Task

1. **Click Dashboard → Status Reports. The Status Reports page appears.**
2. **Click New Report. The Report page appears.**
3. **From When to report tab, specify when you want the status report task to run. The available options are:**
   - **Not scheduled** — Select this if you have not decided on when to perform the status report task or disable the schedule for an existing status report task.
   - **Once** — Specify the date and time to schedule a status report task once.
   - **Hours** — Select this to schedule the task based on hours, if you have to execute the status report task for more than once in a day. For example, let's consider that the current time is 14:00 hours and you have to create a report task that satisfies these conditions:
     - The status report task must start exactly at 14:30 hours
     - The status report task must occur twice a day

     To achieve this, specify 12 for hours and 30 for minutes.
   - **Days** — Select this to schedule the task based on how often the status report task must occur in a week. For example, if you want the status report task to occur once in three days, specify 3 under **day(s)** and select the time when the task should start.
   - **Weeks** — Select this to schedule the task based on how often the status report task must occur in a month. For example, if you want the status report task to occur bi-weekly, specify 2 under **week(s)**, select the days and time when the task should start.
   - **Months** — Select this to schedule the task based on how often the status report task must occur in a year. For example, if you want the status report task to occur on every second Saturday of each month, select **second** from

On the drop-down list, **Saturday** from **of** drop-down list, then select all the months and time when the task should start.

Note

Enable **Stop task after it has run for** <n> **hour(s)** <n> **minute(s)**, to stop a status report task if it exceeds the specified hours.

4. **Click Next. The Report Settings page appears. The available options are:**

Option definitions

Option	Definition
Recipient Email	Specify the recipient email address or SMTP address of the distribution list. In most cases, this should be the Exchange administrator's email address. **Note:** By default, the email address from **Settings & Diagnostics** → **Notifications** → **Settings** → **General** → **Administrator E-mail** is used as the recipient email address.
Subject line for report	Specify a meaningful subject line for the email. For example, if you want a daily status report in HTML format, specify `MSME Daily Status Report (HTML)`.
Number of Rows	Specify the number of rows (n) to be displayed in the status report email. Each row in the status report displays the total number of detections for a particular day. The report contains the detection count for the last (n) days, excluding the day when the status report is triggered. For example: If you specify `1`, the status report will contain one row displaying detections for yesterday. **Note:** You can specify a maximum value of 365.

Option	Definition
Type of Report	Specify the format of the status report, which is sent to the recipient. The available options are: • **CSV** — Select this if you want the status report sent to the recipient in Comma Separated Value format as a **.csv** file attachment. • **HTML**— Select this if you want the status report sent to the recipient in HTML format as a .html file attachment or appear in the email message body.

5. **Click Next. The Please enter a task name page appears.**
6. **Specify a meaningful status report task name, based on the schedule and format you selected in the previous pages. For example, if you are creating a weekly status report task that provides detection statistics for weekdays in HTML format, specify the task name as** `Weekly Status Report (HTML)`**.**
7. **Click Finish, then Apply.**

Results

By performing these steps, you have successfully created a new status report task.

Status report email notifications

Based on your scheduled status report, the recipient receives an email with the statistics on all emails scanned and detected by **TSME** for the specified duration.

Based on your status report configuration, the status report email contains statistical information of the detected items, total clean emails and total number of emails scanned on that day.

Option definitions

Option	Definition
From	Displays the email address that you have specified under **Settings & Diagnostics** → **Notifications** → **Settings** → **General** → **Sender E-mail**.
To	Displays the intended recipient email address that you have specified under **Settings & Diagnostics** → **Notifications** → **Settings** → **General** → **Administrator E-mail**.

Option	Definition
Subject	Displays the subject of the status report email notification that you have specified under **Dashboard** → **Status Reports** → **Report Settings** → **Subject line for report**.
Scanning Statistics for Server	Displays the **Computer name** where **TSME** is installed.
Date	Displays the date in MM/DD/YYYY format.
Detections	Displays detection statistics of **Viruses**, **IP Reputation**, **Potentially Unwanted Program**, **Banned File Types**, **Unwanted Content**, and **DLP and Compliance** in the message body.
Clean	Displays the total number of clean emails that were detected by **TSME** as clean and did not pose a threat. For example, even a status report email sent to the administrator will be counted as a clean email in the statistics.
Total Scanned	Displays the total number of emails scanned by **TSME** for the day.

Note

Status report emails will be blocked if you set the **IP reputation threshold** value to **Trusted IP (below 0)** or **Neutral IP (equal to or above 0)** from **Settings & Diagnostics** → **Gateway Settings** → **McAfee GTI IP reputation**.

Configuration reports

A configuration report is a scheduled report sent to an administrator at a specific time. The report contains the **TSME** product information, policy settings, and system information.

Using **Configuration Reports**, you can automate the task of viewing the summary of product configurations periodically.

This feature is helpful when there are multiple administrators in your organization and you want to keep a track of the **TSME** configuration settings. It is also useful when there are multiple **TSME** installations managed by **ePolicy Orchestrator - On-prem** and you want to track the product configuration.

You can choose a time, recipient email address, or distribution list to send the report to and a subject for the email.

Based on your configuration, the configuration report has product and system information such as: server information, product version information, product license status and type, hotfix information, debug logging information, on-access scanner settings, and on-access policy settings. For more information on how to schedule a configuration report, see *Schedule a new configuration report*.

View configuration report tasks

View a list of configuration report tasks configured for **TSME**.

Task

Click Dashboard → Configuration Reports. The Configuration Reports page appears listing the configured configuration report tasks.

From the **Configuration Reports** page, you can use these options:

Option definitions

Option	Definition
Name	Indicates the name of the report task.
Status	Indicates the status of the report task, whether the task is **Idle**, **Running**, **Stopped**, or **Completed**.
Last Run	Indicates the date and time, when the report task was last executed.
Next Run	Indicates the date and time, when the next report task is scheduled to run.
Action	Lists these options for all the available report tasks: • **Modify** • **Delete** • **Run Now** • **Show Status** The **Stop** option appears only if any report task is running.
Modify	Click **Modify** to edit the settings of an on-demand scan task.

Option	Definition
Delete	Deletes the selected report task.
Run Now	Starts the selected report task immediately.
Show Status	Displays the status of a report task. The **Task Status** page has this tab: - **General** — Provides more information on the report task such as the start and end time, task runtime, current action, and task progress. **Note:** The **Show Status** option is available only after a report task is started.
Refresh	Refresh the page with latest report information.
New Report	Schedule a new configuration report task.

Results

You have now successfully viewed all available configuration report tasks configured for **TSME**.

Schedule a new configuration report

Schedule a new configuration report task to send the product configuration and system information to a specific email address or distribution list, at convenient time intervals.

Task

1. **Click Dashboard → Configuration Reports. The Configuration Reports page appears.**
2. **Click New Report. The Report page appears.**
3. **From When to report tab, specify when you want the configuration report task to run. The available options are:**
    - **Not scheduled** — Select this if you have not decided on when to perform the configuration report task or disable the schedule for an existing configuration report task.
    - **Once** — Specify the date and time to schedule a configuration report task once.
    - **Hours** — Select this to schedule the task based on hours, if you have to execute the configuration report task for more than once in a day. For example, let's consider that the current time is 14:00 hours and you have to create a report task that satisfies these conditions:
        - The configuration report task must start exactly at 14:30 hours
        - The configuration report task must occur twice a day

To achieve this, specify 12 for hours and 30 for minutes.

- **Days** — Select this to schedule the task based on how often the configuration report task must occur in a week. For example, if you want the configuration report task to occur once in three days, specify 3 under **day(s)** and select the time when the task should start.
- **Weeks** — Select this to schedule the task based on how often the configuration report task must occur in a month. For example, if you want the configuration report task to occur bi-weekly, specify 2 under **week(s)**, select the days and time when the task should start.
- **Months** — Select this to schedule the task based on how often the configuration report task must occur in a year. For example, if you want the configuration report task to occur on every second Saturday of each month, select **second** from **On the** drop-down list, **Saturday** from **of** drop-down list, then select all the months and time when the task should start.

Note

Enable **Stop task after it has run for** <n> **hour(s)** <n> **minute(s)**, to stop a configuration report task if it exceeds the specified hours.

4. **Click Next. The Report Settings page appears. The available options are:**

Option definitions

Option	Definition
Recipient Email	Specify the recipient email address or SMTP address of the distribution list. In most cases, this should be the Exchange administrator's email address. **Note:** By default, the email address from **Settings & Diagnostics** → **Notifications** → **Settings** → **General** → **Administrator E-mail** is used as the recipient email address.
Subject line for report	Specify a meaningful subject line for the email. For example, if you want a weekly configuration report, specify MSME Weekly Configuration Report.

5. **Click Next. The Please enter a task name page appears.**
6. **Specify a meaningful configuration report task name, based on the schedule and format you selected in the previous pages. For example, if you are creating a monthly configuration report task that provides product and system information on the first Monday of each month, specify the task name as** Monthly Configuration Report (First Monday).

7. **Click Finish, then Apply.**

Results

By performing these steps, you have successfully created a new configuration report task.

Configuration report email notifications

Based on your scheduled configuration report, the recipient receives an email containing TSME product information, policy settings and system information for the specified duration.

Option definitions

Option	Definition
Server Info	Displays server information such as the computer name, IP address and Exchange version.
Version Info	Displays TSME information such as the product version, DAT version and date, Engine version, and Engine information (if any).
License Status	Displays product license information.
Product Information	Displays additional product information on whether any service pack or hotfix is installed.
Debug Logging	Displays **Debug Logging** information such as the level, maximum size of the log file and location of the file.
On-Access Settings	Displays the current **On-Access Settings** configuration specifying which setting is enabled or disabled.
On-Access Policies	Displays the core scanners and filters enabled for the **On-Access Primary policy**.

Graphical reports

Generate graphical reports to understand the threat-level during a specific time-frame. Provides an explicit view of detected items in the form of a **Bar Graph** or **Pie Chart**.

These reports along with the status report will help you and your organization to identify servers facing higher threats and help you in coming up with mitigation plans.

Use graphical reports when you want to only view the current threat-level and doesn't have to take any action on the detected items. **Graphical Reports** allow you to query based on certain filters, where you can view **Top 10** reports for various detections.

Graphical Reports are classified into:

- **Simple** — Limited search filters to view Top 10 report of the day or week.
- **Advanced** — More search options to query on different filters, time-range, and chart options.

View graphical report using simple search filters

Generate graphical report on detections using simple search filters for the day or week.

Task

1. **Click Dashboard → Graphical Reports. The Graphical Reports page appears.**
2. **Click the Simple tab.**
3. **From Time Span drop-down list, select Today or This week to view detections quarantined for the day or for the week.**
4. **From Filter drop-down list, select the report that you want to view. The options available are:**
    - **Top 10 Viruses** — Lists the top 10 virus names ranked by their detection count.
    - **Top 10 Blocked IP addresses** — Lists the top 10 IP addresses ranked by the blocked count for bounced emails.
    - **Top 10 Unwanted Programs** — Lists the top 10 potentially unwanted programs detected that might be threats.
    - **Top 10 TIE detections** — Lists the top 10 potential threats detected by TIE.
    - **Top 10 Spoof detections** — Lists the top 10 spoofing emails detected.
    - **Top 10 DLP and Compliance Detections** — Lists the top 10 data loss prevention and compliance regulatory violations ranked by the number of detections that triggered the rule.
    - **Top 10 Infected Files** — Lists the top 10 file names ranked by their detection count.
    - **Top 10 Blocked URLs** — Lists the top 10 URLs detected that might be threats.
    - **Top 10 Detections** — Lists the top 10 detections ranked by their detection count. This graph contains all the categories such as viruses, blocked IP addresses, unwanted programs, DLP and compliance, malicious URLs, and infected files listed above.
5. **Click Search. The search results are shown in the View Results pane.**

    In **Magnify Graph**, select the zoom percentage to let you enlarge or reduce the view of the graph in the **View Results** pane

Use advanced search filters

Generate graphical report on detections using advanced search filters.

Task

1. **Click Dashboard → Graphical Reports. The Graphical Reports page appears.**
2. **Click Advanced tab.**
3. **Select at least one filter or up to three filters from the list:**

Primary filters

Filter	Description
Subject	Search using the "subject" of an email.
Recipients	Search using an email address of the recipient.
Reason	Search using the detection trigger or using the reason why the item was quarantined. When you select the **Reason** filter, secondary filters are enabled for further refining your search. For example, you might want to search for all items that were quarantined due to the **Mail Size** rule being triggered as the reason.
Ticket Number	To search using the ticket number. A ticket number is a 16-digit alpha-numeric entry which is auto-generated by the software for every detection.
Detection Name	To search by the name of a detected item.

Note

A secondary filter is only available for the **Reason** filter. If you do not want to specify the secondary filter, ensure that the field is blank so that all detections are queried upon.

Secondary filters

Filter	Description
Anti-Virus	Search for items that were quarantined when a potential virus was found in the message.
DLP and Compliance	Search for items that were quarantined when a banned content was found in the message. For example: inappropriate words.

Filter	Description
File Filter	Search for items that were quarantined when a banned file was found in the message.
IP Reputation	Search for items that were quarantined when IP Reputation exceeds the defined threshold.
Encrypted or Corrupted	Search for items that were quarantined when encrypted or corrupt content was found in the email.
Potentially Unwanted Program	Search for items that were quarantined when potentially unwanted program was found in the email.
Packer	Search for items that were quarantined when packers (small programs, compressed executables files, encrypted code) was found in the email.
Mail Size	Search for items that were quarantined when mail size exceed the maximum limit set.
Encrypted	Search for items that were quarantined when encrypted content was found in the email.
Signed	Search for items that were quarantined when signed content was found in the email.
Corrupted	Search for items that were quarantined when corrupt content was found in the email.
Denial of Service	Search for items that were quarantined when denial-of-service threat occurred. For example: if you want to retrieve all email messages that were quarantined during the event.

Filter	Description
Protected Content	Search for items that were quarantine when protected content was found and the content might not be accessed for scrutiny.
Password Protected	Search for items that were quarantined when password protected content was found and the content might not be accessed for scrutiny.
Blocked MIME	Search for items that were quarantined when blocked MIME (multipurpose Internet Mail Extension) were found in the email.
URL Reputation	Search for items that were quarantined when URL reputation exceeds the defined threshold.
TIE Reputation	Search for items that were quarantined when TIE reputation exceeds the defined threshold.
SPF Soft Fail	Search for items that were quarantined when spoof content was found in the email.
SPF Hard Fail	Search for items that were quarantined when spoof content was found in the email.

Note

For more information about the search filters, see *Search filters*.

4. **Select All Dates or a Date Range from the drop-down lists.**
   If you select **All Dates**, the query returns search results from quarantine database from day it started quarantining any detected items. If you select **Date Range**, select the **Date**, **Month**, **Year**, **Hour**, and **Minutes** from the **From** and **To** fields to enable your query to search within a date range.
5. **Select Bar Graph or Pie Chart as required.**
6. **If you select Pie Chart, select a filter from the drop-down list to further refine your search:**

Query on

Filter	Description
Recipients	Search using the recipient email address
Sender	Search using the senders email address
Filename	Search using a quarantined file name.
Detection Name	Search using the name of a detected item.
Subject	Search using the "subject" of an email.
Reason	Search using the detection trigger or using the reason why the item was quarantined.
Rule Name	Search using the name of the rule that triggered the detection.
Policy Name	Search using the policy name that made the detection.

a. **In Maximum Results, specify the number of search results you want to view. You can view a maximum of 99 search results and this field is available only if you select pie chart.**

7. **Click Search. The search results are shown in the View Results pane. In Magnify Graph, select the zoom percentage to let you enlarge or reduce the view of the graph in the View Results pane The search results are shown in the View Results pane.**

Update the URL database

Update your local URL database when you submit to block or allow URLs to **Trellix GTI** .

Task

1. **On the product's menu page select Statistics & Information, and then click Update URL DB.**

Note

URL database update starts only if **Mail URL Reputation** policy is enabled. So, before updating your URL DB, make sure your **Mail URL Reputation** is enabled.

2. **When Mail URL Reputation is enabled, you can click Update URL DB to trigger an on-demand URL database update.**
   On selecting **Update URL DB**, the URL database download starts. You can check the download status of the URL database in the product log. If you click **Update URL DB** during the download process, a pop-up shows that the download is in progress.

Detected items

View information about all email messages containing potential threats that are detected and quarantined by **TSME.** You can use various search filters to refine the search and find quarantined items that are of interest to you, view the results and take necessary action on the quarantined items.

From the product's user interface, click **Detected Items** to view quarantined items based on the detection category. The detection categories are:

- **Viruses**
- **TIE and ATD Detections**
- **Spoofed Mails**
- **Potentially Unwanted Programs**
- **Unwanted Content**
- **Banned File types and Messages**
- **DLP and Compliance**
- **Mail URL Reputation**
- **All Items**

Manage quarantined data

Based on your requirement, use the local database to quarantine detected items.

By default, detected items are quarantined locally to a PostgreSQL database installed by **TSME**.

Configure quarantine location

Based on the **Detected Items** configuration settings, you can choose to quarantine detected items in the local database. The configuration is applied to all **TSME** servers in the **System Tree**.

From the product's user interface, click **Settings & Diagnostics** → **Detected Items** and select:

- **Local Database** — To quarantine detected items in the local **TSME** server, at the specified path.

Detection types

Detected items are email messages identified by **TSME** as a potential threat, that could be a virus, non-compliant content, a URL, or banned file types.

The detection types in TSME are:

Detection types	Description
Viruses	A computer program file capable of attaching to disks or other files and replicating itself repeatedly,

Detection types	Description
	typically without user knowledge or permission. Some viruses attach to files, so when the infected file executes, the virus also executes. Other viruses sit in a computer’s memory and infect files as the computer opens, modifies, or creates files. Some viruses display symptoms, others damage files and computer systems, but neither is essential in the definition of a virus; a non-damaging virus is still a virus. **Note:** You cannot **Download**, **Release**, **Forward**, or **View** quarantined items from the **Viruses** detection category.
TIE and ATD Detections	In addition to DAT and **Trellix GTI** , you can now use the enhanced detection capabilities of **Trellix Global Threat Intelligence** and **Trellix Intelligent Sandbox**.
Spoofed Mails	Email spoofing is a common ploy used to attract users by sending an email with a different sender email address. Users might open and respond to emails without knowing that the email is not actually from the legitimate source.
Potentially Unwanted Programs	Often legitimate software (non-malware) that may alter the security state or the privacy posture of the system on which they are installed. This software can, but not necessarily, include spyware, adware, keyloggers, password crackers, hacker tools, and dialer applications and could be downloaded in conjunction with a program that the user wants. Security-minded users may want to know about such programs and, in some cases, have them removed.
Unwanted Content	This is any content that triggers a content scanning rule. It might include offensive, abusive, unpleasing words or even a company's confidential information. **Unwanted Content** can be categorized into:

Detection types	Description
	- **Packers** - **Encrypted Content** - **Signed Content** - **Corrupted Content** - **Denial of service** - **Protected Content** - **Password protected files** - **Incomplete MIME messages**
Banned File types and Messages	Certain types of file attachments are prone to viruses. The ability to block attachments by file extension is another layer of security for your mail system. Both internal and external email messages are checked for banned file types or messages.
DLP and Compliance	Stop the loss of sensitive information via email. **TSME** provides industry-leading email content analysis to provide the tightest control of sensitive content in any form to aid compliance with many state, national, and international regulations. Prevent data leakage with the most extensive email Data Loss Prevention (DLP) in the industry that does pattern matching to detecting data; policy-based message handling that prevents outbound data loss.
Mail URL Reputation	Blocks emails with unwanted URLs, phishing links, or malware. When the URL limit exceeds in a mail, you get notified under the **View Results** section.
Add URL Score to Mail Header	Emails that are scanned by the URL filter contains the URL Reputation score in the mail header. You can view the reputation score in the message details of the email.

Available primary search filters

Search filters enable you to define the search criteria and provide more efficient and effective searches from the quarantine database.

The available primary search filter option varies based on the detected item category you have selected. These search filters appear in the **View Results** section of the detected item category.

Note

Use **Columns to display** in the **View Results** section, to select the search filters that you want to view.

Detected Items — Primary search filters

Search filter	Definition
Action taken	Search for an item based on the action that was taken on it. The actions taken by TSME are: • **Clean** • **Cleaned** • **Deleted** • **Deleted Message** • **Denied Access** • **Logged** • **Replaced** • **Rejected**
Anti-Virus DAT	Search for an item based on the anti-virus DAT version with a distinctive signature. To view the current **Anti-Virus DAT** used, go to **Dashboard** → **Versions & Updates** → **Update Information** → **Anti-Virus Engine | DAT Version | Extra Drivers**. For example, the DAT version appears in this format: 6860.0000
Anti-Virus Engine	Search for an item based on the anti-virus engine that had a sequence of characters unique to a virus/ unwanted content. To view the current **Anti-Virus Engine** used, go to **Dashboard** → **Versions & Updates** → **Update Information** → **Anti-Virus Engine | DAT Version | Extra Drivers**. For example, the **Anti-Virus Engine** version appears in this format: 5400.1158
Banned Phrases	Search by the content of banned phrases that are defined in the **DLP and Compliance Rules** under

Search filter	Definition
	Policy Manager → **Shared Resource** → **DLP and Compliance Dictionaries**.
Detection Name	Search for a detected item based on its name.
File Name	Search by the name of the detected file in the quarantined item. To view the **File Name** used, go to **Policy Manager** → **Shared Resource** → **DLP and Compliance Dictionaries** → **File Filtering Rules**.
Folder	Search by the folder where quarantined items are stored such as a user's mailbox. **Note:** The folder will not be available if the email is quarantined at the On-Access (Transport) level.
Policy Name	Search for an item by a policy name such as a **Primary policy** or sub-policy that detected the item.
Reason	Search for an item based on the reason why it was detected. This could be based on the scanners and filters such as **Anti-Virus**, **DLP and Compliance**, and so on.
Reasons	Search by a rule or rules that were triggered by a particular email. Use this if an item has triggered multiple scanners or filters. For example, if a spam email contains a virus, the **Reasons** is **Anti-Virus**.
Recipients	Search for an item through the recipient's email address.
Rule Name	Search for an item based on the rule that triggered one or more scanners/filters. The rule that triggered

Search filter	Definition
	the scanner or filter is based on the **Actions** set for each policy.
Scanned by	Search for an item by the scanner name that detected the item.
Sender	Search for an item by the sender's email address.
Server	Search for an item based on the computer name.
State	Search for an item based on its current status. The available items states are: • **Untrained** — Items that are not acted upon such as purged, released, forwarded or deleted. The initial state of all items will be **Untrained**. • **Released** — Items that are released from the quarantine database. • **Forwarded** — Items that are forwarded to the intended recipients.
Subject	Search for an item based on the subject line of the email message.
Task	Search for an item based on the scan task name which can be an On-Access (Transport) scan task or On-Demand scan task. The on-access scan task that appears in the **View Results** section is based on the settings you have enabled under **Settings & Diagnostics** → **On-Access Settings**. To know whether the item was detected due to an on-demand scan task, go to **Dashboard** → **On-Demand Scans**.
Ticket Number	Search for an item based on the ticket number, which is a unique alphanumeric identifier assigned to a specific detection and delivered as a notification through email. It helps identify the associated detection.

Search filter	Definition
TIE Score	Search for items based on the **TIE** score reputation.

Search filter comparison chart

Provides information on which search filter is available for a selected detected item category.

The available search filters in **TSME** vary based on the detected item category you have selected. Use this as a reference material, when you are not sure about which search filter is available for a specific detected item category.

A quick look into this comparison chart helps you know the available search filters for a specific detection type.

Comparison chart — Search filters for detection types

Filter	IP Reputation	Viruses	Potentially Unwanted Programs	Unwanted Content	Banned File types and Messages	DLP and Compliance	Mail URL Reputation
Action Taken	✓	✓	✓	✓	✓	✓	✓
Anti-Virus DAT		✓	✓				
Anti-Virus Engine		✓	✓				
Banned Phrases				✓		✓	✓
Detection Name		✓	✓				

Filter	IP Reputation	Viruses	Potentially Unwanted Programs	Unwanted Content	Banned File types and Messages	DLP and Compliance	Mail URL Reputation
Filename		✓	✓	✓	✓	✓	✓
Folder		✓	✓	✓	✓	✓	✓
IP Reputation Score	✓						
Policy Name		✓	✓	✓	✓	✓	✓
Recipients		✓	✓	✓	✓	✓	✓
Reputation Score							
Rule Name			✓	✓	✓	✓	✓
Scanned By		✓	✓	✓	✓	✓	✓
Sender		✓	✓	✓	✓	✓	✓
Sender IP	✓						
Server		✓	✓	✓	✓	✓	✓
Subject		✓	✓	✓	✓	✓	✓

Filter	IP Reputation	Viruses	Potentially Unwanted Programs	Unwanted Content	Banned File types and Messages	DLP and Compliance	Mail URL Reputation
Ticket Number		✓	✓	✓	✓	✓	✓

Note

The search filters **Reason**, **Reasons**, **State** and **Task** are not available in this comparison chart, as it is available only for **Detected Items** → **All Items** category.

Additional search options

Provides information on additional search options to narrow-down the detected items search results.

Option definitions

Option	Definition
AND	Search items based on the conditions set in the previous and next filter option, where the search results satisfy both the conditions.
OR	Search items based on the conditions set in the previous and next filter option, where the search results satisfy either of the conditions.
Contains	Search for an item that contains the specified text in the primary search filter. For example, if you want to search for quarantined items that were detected in the **Outbox** folder, select **Folder** as the primary search filter, select **Contains** from the drop-down list, then type `out` in the text box and click **Search** to view the search results in the **View Results** section.

Option	Definition
Not Contains	Search for an item that excludes the specified text in the search results. For example, if you do not want logged items to appear in your search results, select **Action Taken** as the primary search filter, select Not **Contains** from the drop-down list, then type `log` and click **Search** to view the search results in the **View Results** section.
Exact Match	Search for an item that is an exact match of the specified text. For example, if you want to search for quarantined items that were detected by a specific **Anti-Virus Engine** version number 5400.1158, select **Anti-Virus Engine** as the primary search filter, select **Exact Match** from the drop-down list, then type `5400.1158` in the text box and click **Search** to view the search results in the **View Results** section.
Match RegExp	Search for an item matching a particular pattern, using regular expressions. For example, if you want to search based on a valid email address anywhere in the detection, select **Detection Name** as the primary search filter, select **Match RegExp** from the drop-down list, then type `\b[A-Z0-9._%+-]+@(?:[A-Z0-9-]+\.)+[A-Z]{2,4}\b` in the text box and click **Search** to view the search results in the **View Results** section.
Equal to	Search for an item containing the **Reputation Score** or **IP Reputation Score** that equals the specified value.
Less than	Search for an item containing the **Reputation Score** or **IP Reputation Score** that is less than the specified value.
Greater than	Search for an item containing the **Reputation Score** or **IP Reputation Score** that is more than the specified value.

Option	Definition
Case Sensitive	Select if your search criteria is case-sensitive.
All Dates	Select if you want to search for items on all dates. **Note:** The search results appear based on the date stored in the quarantined items database.
Date Range	Search for an item within a defined date range according to your requirements. Here you can specify the date, month, year and time against the parameters **From** and **To**. You can also use the calendar icon to specify a date range. **Note:** The date range is based on the local system time.
Search	Click to view a list of quarantined items matching your search criteria that appear in the **View Results** section.
Clear Filter	Click to return to default search settings.

Search detected items

Use search filters to find specific quarantined items that are of interest to you and take corresponding action.

You can use a combination of search filters such as boolean logic operators, regular expressions, case-sensitive text or date range.

Task

1. **From the product's user interface, click Detected Items.**
2. **From the left-pane, click All Items.**
3. **From the Search pane, select the desired search filters from the drop-down lists (if required). The available search options are:**

Search options

Search feature	Description
Primary search filter	Select if you want to refine your search criteria based on a specific filter such as **Policy Name**, **Action Taken**, **Sender** and so on. **Note:** For more information on all primary search filters, see *Available primary search options* section.
Boolean logic operator	Select if you want to refine your search by using these logical operators: • **AND** • **OR** **Note:** For more information on these filter options, see *Additional search options* section.
Secondary search filter	Select if you want to refine your search by using these secondary filters: • **Contains** • **Not Contains** • **Exact Match** • **Match RegExp** • **Equal to** • **Less than** • **Greater than** **Note:** For more information on these filter options, see *Additional search options* section.
Case Sensitive	Select if your search criteria is case-sensitive.
Date Range	Select if you want to refine your search to all dates or to a specific time frame.

Search feature	Description
	- All Dates - Date Range

4. **Click Search.**

Results

By performing this task, you have successfully searched for detected items matching your search criteria, that now appear in the **View Results** section.

Actions that you can take on quarantined items

View results of the search based on the parameters you defined and take necessary action on quarantined items.

You can then execute various actions on these quarantined items.

Types of action

Action	Definition
Release	To release a quarantined item. Select an applicable record from the **View Results** pane and click **Release**. The original email message is released from the database for delivery to the intended recipient. **Note:** • When an item is downloaded, released or forwarded, it will be scanned for viruses and will appear in the **Dashboard** → **Recently Scanned Items** section. • After a successful release, the item will appear with status as **Released** under **Detected Items** → **All Items** category.
Download	To download a quarantined item for research or analysis. Select one applicable record from the **View Results** pane and click **Download**.

Action	Definition
	Note: You cannot **Download**, **Forward**, **View** or **Release** multiple records at a time from **Detected Items** → **All Items** category. However, you can **Release** multiple records from a specific category.
Export to CSV File	To export and save information about all quarantined items returned by the search in a **.CSV** format. If there are thousands of quarantined items in the database, instead of navigating through multiple pages, you can use this option to download these records to a file in CSV format and later generate custom reports in Microsoft Excel. From the **View Results** pane, click **Export to CSV File** to **Open** or **Save** the search results to the desired folder or location. To specify a limit on how many quarantined items need to appear in the **View Results**, modify the **Maximum query size (records)** value from **Settings & Diagnostics** → **Detected Items** → **Local Database**. **Note:** • If you do not find a specific field in the search result of the CSV file, make sure to enable the required field in the **Columns to Display** option. • Use the **Import Data** option in Microsoft Excel, to open the CSV file in a different locale.
Forward	To forward the quarantined item to the desired recipient. Use semi-colon as a delimiter to forward the quarantined item to multiple recipients. The quarantined item is sent as a new email with the quarantined file attached (**.eml** format.)

Action	Definition
	Note: To forward the quarantined item to a Distribution List (DL) within your organization, specify the SMTP address of the DL.
View	To view the quarantined item in a separate window.
Columns to display	To select additional column headers to be listed in the **View Results** pane. This option has a list of all the filters available in the **Search** pane and some more options.
Select All	To select all quarantined items that appear in that page of the **View Results** section. For example, if you have 100 quarantined items and set the items to view **per page** as 10, then only 10 items that appear in the **View Results** section are selected.
Select None	To deselect all quarantined items that appear in the **View Results** section.
Delete	To delete the quarantined items that you selected in that page of the **View Results** section for the selected category. **Note:** Press and hold down the **Ctrl** key to select multiple items.
Delete All	To delete all quarantined items from the database for the selected category.
Views **per page**	To specify the maximum number of quarantined items that you want to view per page. The options are: • 10 • 20 • 50

Action	Definition
	• 100

Each item in the **View Results** pane has an image, which indicates:

Icon	Description
🛢	An item that is quarantined and can be downloaded, forwarded, released or viewed.
✗	An item that is only logged and cannot be downloaded, forwarded, released or viewed.

Policy Manager

Allows you to configure or manage different policies and corresponding actions in the product. Determine how different types of threats are treated when detected.

A policy is typically described as a principle or rule to guide decisions and achieve rational outcomes. Policies are adopted within an organization to help objective decision making.

In TSME, a policy specifies the settings that are used and the actions taken when a detection is triggered in the Exchange environment. You can create multiple policies and define specific settings and actions to particular policies. For example, you can create multiple subpolicies for the **On-Access** menu option and have a different setting and action set for each policy.

To simplify, an TSME policy = Scanner settings + Actions to take.

Note

Use the **Shared Resource** menu option under **Policy Manager**, to modify or create rules for scanner, filter, and alert settings from one common location. Use **Shared Resource** to save time in creating and applying TSME policies.

Steps to create a policy

As an administrator, to create a policy, you must:

1. Enable the scanner or filter.
2. Edit scanner or filter settings from the policy or **Shared Resource**.
3. Specify an action to take when a detection is triggered.
4. Specify users for whom this policy applies.
5. Apply the settings for the required policy category.

Policy categories to handle threats

View available policy categories and apply an existing default policy (known as a Primary policy) to your entire organization.

TSME helps you mitigate electronic threats with special set of rules and settings called policies, that you can create to suit your Exchange organization needs.

When you install TSME for the first time on your Exchange server, a default **Primary policy** is available for these menu options:

- **On-Access**
- **On-Demand (Default)**
- **On-Demand (Find Viruses)**
- **On-Demand (Remove Viruses)**
- **On-Demand (Find Banned Content)**
- **On-Demand (Remove Banned Content)**

- **On-Demand (Full Scan)**

You can customize policies under each of these categories to precisely handle specific threats that could affect your Exchange organization.

Policy Manager views

View and sort subpolicies based on inheritance or priority.

The types of **Policy Manager** views are:

- **Inheritance View**
- **Advanced View**

Inheritance view

Displays the priority and status of the Primary policy and all subpolicies. **TSME** acts on an email, based on the settings configured for the subpolicy with highest priority. When the rules of a subpolicy are not satisfied, **TSME** moves on to the subpolicy with the next priority. Settings configured in the Primary policy are applied, when rules in none of the subpolicies are satisfied.

When you select **Inheritance View**, the subpolicies appear based on the inheritance of the policy.

In this view, you can:

- View the policy and its priority
- View the inherited subpolicy and its parent policy
- Enable or disable subpolicies
- Delete subpolicies

Advanced view

Display all policies in ascending order, based on the priority and provides an option to change the priority of a subpolicy.

In this view, you can:

- View the policies sorted on priority
- Modify the priority of a policy

Note

Use these icons to modify the priority of a policy:

- ▲ — Increase the priority of a policy.
- ▼ — Decrease the priority of a policy.

- Enable or disable subpolicies
- Delete subpolicies
- Edit the policy name, description, and parent policy by clicking **Details**

Primary and secondary policy

A policy setting inside a hierarchical structure is ordinarily passed from parent to children, and from children to grandchildren, and so forth. This concept is termed as inheritance. In TSME, the default parent policy is referred as **Primary policy** and child policy is referred as **Secondary policy**.

Primary policy

Default parent policy available for all policy categories that define how items are scanned for viruses, how files are filtered, and various other settings. These policies apply to all users within an organization.

Note

You cannot delete the **Primary policy**, as it acts as a baseline to create secondary policies.

Secondary policy

Policies which inherit their settings and actions from another policy is known as a secondary policy. You can create more secondary policies with different settings and actions as needed, to apply to specific users.

Secondary policies are required in situations where you need exceptions to the **Primary policy** to suit any geographical areas, functions, mailboxes, domains, or departments within your organization. In TSME, the general term for such more policies is known as a policy group.

Action taken on an email is based on the settings configured for the secondary policy with highest priority. When the rules of a secondary policy with highest priority are not satisfied, TSME moves on to the secondary policy with the next priority. Settings configured in the Primary policy are applied only when rules in none of the secondary policies are satisfied.

If you select **Inherit settings from parent policy** in the scanner or filter settings page, an inherited policy (subpolicy) uses the same setting as the parent policy. However, if there is a detection, you can take a different action. Any changes to the settings in the parent or **Primary policy** is reflected in these subpolicies.

Example: Creating a subpolicy to act on all email messages identified by TSME as a threat to be:

- Quarantined — For all users
- Logged, quarantined, and notify the administrator — For administrators

This simple example provides you more insight on when you might need a subpolicy.

Example — When do you need a subpolicy

Policy type	Scanner	Protection level	Users	Actions to take
Primary policy	Anti-virus	Medium Protection	All users	**Quarantine**

Policy type	Scanner	Protection level	Users	Actions to take
Secondary policy	Anti-virus	High Protection	Administrators	**Log, Quarantine, and Notify administrator**

Note

Restoring TSME to default setting removes the existing subpolicies. Make sure to back up the policies and settings using **Export** from **Settings & Diagnostics** → **Import and Export Configuration** → **Configuration** tab, before restoring TSME to factory settings.

Create secondary policies

Create other policies based on the **Primary policy** to suit specific needs of any part of your organization. Create secondary policies for any exceptional situations that are not covered by the **Primary policy**.

This is useful when you do not want to apply rules from the **Primary policy** for certain users or groups in your organization. You can create exceptions and allow TSME to perform specific scan.

Some example's on when to create a secondary policy:

- Allow through inbound emails to Executive level users in your organization after scanning, but quarantine for other users.
- Allow certain file formats for specific user groups. For example, if you want to block .wav files for all users, except a specific department in your organization.

Task

1. **From Policy Manager, select a menu item for which you want to create a secondary policy.**
2. **Click Create Secondary policy.**
   The **Create a Secondary policy** page appears.
3. **Under Initial configuration → Identification → Secondary policy name, specify a name that identifies the policy and what it does.**
4. **Type a Description for the policy (optional).**
5. **Select the Parent policy for the Secondary policy from where to inherit the settings.**
6. **Click Next.**
7. **Under Trigger Rules → Rules, click New Rule.**
8. **From Specify a policy rule, you can select:**
   - **<select a rule template>** — To specify a policy rule based on the sender or recipient. You can create new rules, based on these options:
     - **The SMTP address of the sender is email address**
     - **The SMTP address of the sender is not email address**
     - **The SMTP address of any recipients is email address**

- **The SMTP address of any recipients is not email address**
- **The sender is in Active Directory Group**
- **The sender is not in Active Directory Group**
- **Any of the recipients is in Active Directory Group**
- **Any of the recipients is not in Active Directory Group**

Note

Make sure that you do not create rules with conflicting email addresses or user names. Regular expression (regex) is not supported for specifying users, only wildcard is supported.

- **Copy rules from another policy** — To copy the rules from another policy.

9. **Click Add.**
10. **Specify the conditions when the policy should trigger for the user. You can select:**
    - **Any of the rules apply**
    - **All rules apply**
    - **None of the rules apply**
11. **Click Next.**
12. **From Scanner and Filters, you can select:**
    - **Inherit all settings from the parent policy** — To inherit all properties of the parent policy.
    - **Initialize selected settings with values copied from another policy** — To select specific scanners and filters from the available policies.
13. **Click Finish.**

Core scanners and filters

Determine the types of scanners and filters that can be applied when creating policies.

Core scanners

View and configure settings for these scanners from **Policy Manager** → **Shared Resource**.

Scanner	Definition
Anti-Virus Scanner	Configure settings to detect threats such as viruses, trojans, worms, packers, spyware, adware, and more.
DLP and Compliance Scanner	Create or configure **DLP and Compliance Rules** to meet your Exchange organization's confidential and compliance policies with the addition of 60 new **DLP and Compliance Dictionaries**.

Scanner	Definition
File Filtering	Create new file filtering rules to meet the Exchange organization needs. Configure these settings based on file name, file category, or file size.
Mail URL Reputation	Configure settings to detect URLs that contain unwanted links, phishing links, and malware.

Filters

Enable or disable these filters and specify actions to take when there is a detection, based on your Exchange organization needs.

Note

You can enable or disable some filters, but cannot configure the customized settings. Those filters do not appear under **Shared Resource** → **Scanners & Alerts** → **Scanners** → **Category** drop-down list.

Filter	Definition
Corrupt Content	Configure settings to act on email messages that are detected as corrupt content.
Protected Content	Configure settings to act on email messages that are detected as protected content.
Encrypted Content	Configure settings to act on email messages that are detected as encrypted content.
Signed Content	Configure settings to act on email messages that are detected as signed content.
Password-Protected Files	Configure settings to act on email messages that contain password protected files. You can override the file filtering policy to allow through emails that contain password-protected files attachments as required. For more information, see *Configure password-protected file settings*.

Filter	Definition
Mail Size Filtering	Create or configure settings to act on email messages that exceed the mail size filtering options. Configure settings to quarantine email messages based on the overall mail size, attachment size, and number of attachments.
Scanner Control	Create or configure core scanner settings to act on email messages based on the nesting level, expanded file size, and scanning time.
MIME Mail Settings	Create or configure settings to detect threats that are categorized as MIME message.
HTML Files	Create or configure settings to act on email messages containing HTML elements such as comments, URLs, metadata, and scripts.

Miscellaneous

Configure miscellaneous settings such as alerts and disclaimers that are sent to end users, if there is a detection.

Miscellaneous	Definition
Alert Settings	Create or configure settings for an email alert if there is a detection. Configure settings such as the alert email format (HTML or text), encoding, file name, header, and footer.
Disclaimer Text	Create or configure the disclaimer text that has to appear in the email sent to end user, if there is a detection.

Scanners and filters comparison chart

Provides information on which search scanner or filter is available for each policy category by default.

The available scanner or filter in **TSME** varies based on the policy category you have selected.

Use this as a reference material, when you are not sure about which scanner or filter is available for a specific policy category. A quick look into this comparison chart helps you know the available scanners and filters for each policy category, where the acronyms are:

- OA — **On-Access**
- OD (D) — **On-Demand (Default)**
- OD (FV) — **On-Demand (Find Viruses)**
- OD (RV) — **On-Demand (Remove Viruses)**
- OD (FC) — **On-Demand (Find Non-Compliant Content)**
- OD (RC) — **On-Demand (Remove Non-Compliant Content)**
- OD (FS) — **On-Demand (Full Scan)**

Core scanners

Core Scanners	OA	OD (D)	OD (FV)	OD (RV)	OD (FC)	OD (RC)	OD (FS)	GW
Anti-Virus Scanner	✓	✓	✓	✓			✓	
DLP and Compliance Scanner	✓	✓			✓	✓	✓	
File Filtering	✓	✓					✓	
Mail URL Reputation	✓	✓					✓	

Note

Even though **DLP and Compliance Scanner** is available for the **On-Access** and **On-Demand (Default)** policy category, it is not active or enabled by default. You must create the required rules, then specify an action to take when a rule is triggered and enable the scanner.

Filters

Filters	OA	OD (D)	OD (FV)	OD (RV)	OD (FC)	OD (RC)	OD (FS)	GW
Corrupt Content	✓	✓					✓	
Protected Content	✓	✓			✓	✓	✓	
Encrypted Content	✓	✓			✓	✓	✓	
Signed Content	✓	✓			✓	✓	✓	
Password-Protected Files	✓	✓			✓	✓	✓	
Mail Size Filtering	✓							✓

Filters	OA	OD (D)	OD (FV)	OD (RV)	OD (FC)	OD (RC)	OD (FS)	GW
Scanner Control	✓	✓	✓	✓	✓	✓	✓	✓
MIME Mail Settings	✓	✓			✓		✓	✓
HTML Files	✓	✓			✓		✓	✓

Alert and disclaimer settings

Miscellaneous settings	OA	OD (D)	OD (FV)	OD (RV)	OD (FC)	OD (RC)	OD (FS)	GW
Alert Settings	✓	✓		✓	✓	✓	✓	✓
Disclaimer Text	✓							

List all scanners and filters for a selected policy

View status of the available scanners and filters for the selected policy category.

The type of settings that is available depends on which policy is selected.

Task

1. **From the product's user interface, click Policy Manager and policy category menu item.**
   The policy page for the selected menu item appears.
2. **Click Primary policy or the wanted subpolicy.**
   The corresponding policies page appears. The applicable filtlers are available in the respective policy pages.

3. **In the policies page, you can use these tabs:**
   - **List All Scanners** — To view which scanner or filter is enabled for the policy.
   - **View Settings** — To view settings of the scanner or filter and the actions specified.
   - **Specify Users** — To specify policy rules that apply to specific users.

   Note

   You can specify users only to subpolicies.

4. **From the List All Scanners tab, you can use:**

Policy configuration

Option	Definition
Policy	To select the policy, you want to configure.
Add Scanner/Filter	To configure the policy so that it applies only at specific times. For example, you can create new anti-virus setting with different rules, which is applicable only on weekends.
Core Scanners	To configure the policy for each of these scanners: • **Anti-Virus Scanner** • **DLP and Compliance Scanner** • **File Filtering** • **Mail URL Reputation**
Filters	To configure the policy for each of these filters: • **Corrupt Content** • **Protected Content** • **Encrypted Content** • **Signed Content** • **Password Protected Files** • **Mail Size Filtering** • **Scanner Control** • **MIME Mail Settings** • **HTML Files**

Option	Definition
Miscellaneous settings	To configure the alert settings and disclaimer messages for polices. **Miscellaneous** options include: • **Alert Settings** • **Disclaimer Text**

Add a scanner or filter

Add a scanner or filter to create settings for exceptional scenarios in your Exchange organization.

Adding a scanner or filter is useful, when you want an additional scanner or filter:

- With different options and rules
- Enabled only during a specific time slot

Task

1. **From Policy Manager, select a policy category.**
2. **Click Primary policy or any subpolicy.**
3. **From the List All Scanners tab, click Add Scanner/Filter.**

Note

The **Add Scanner/Filter** option is available only for **On-Access** policy category.

4. **From Specify the category drop-down list, select the required scanner or filter.**
5. **From When to use this instance section, select an existing time slot or create a new one.**
6. **Click Save.**
7. **Click Apply.**

Note

Edit the options and rules to suit your organization needs.

Create new rule for specific users

Build new rules and specify conditions to be applied for a particular user.

You can create rules for specific users or groups to have an exception in the policy.

Task

1. **From Policy Manager, select a policy category.**
2. **Click the subpolicy you want to configure for specific users.**
3. **Click the Specify Users tab.**
4. **Click New Rule.**
5. **From Specify a policy rule, you can select:**
   - **<select a rule template>** — To specify a policy rule based on the sender or recipient. You can create new rules, based on these options:
     - **The SMTP address of the sender is email address**
     - **The SMTP address of the sender is not email address**
     - **The SMTP address of any recipients is email address**
     - **The SMTP address of any recipients is not email address**
     - **The sender is in Active Directory Group**
     - **The sender is not in Active Directory Group**
     - **Any of the recipients is in Active Directory Group**
     - **Any of the recipients is not in Active Directory Group**

   Note

   > Make sure that you do not create rules with conflicting email addresses or user names. Regular expression (regex) is not supported for specifying users, only wildcard is supported.

   - **Copy rules from another policy** — To copy the rules from another policy.
6. **Click Add.**
7. **Specify the conditions when the policy should trigger for the user. You can select:**
   - **Any of the rules apply**
   - **All rules apply**
   - **None of the rules apply**
8. **Click Apply to save the rule to the specific user.**

Actions you can take on detections

For each scanner and filter settings in a policy, you can specify a primary and secondary action to take on a detection. You can specify what happens to an email message or its attachment, when it triggers a detection.

When a policy rule is triggered based on the scanner or filter settings, TSME acts on the detection based on the primary and secondary action configured.

When configuring actions, at least one primary action must be selected. You can also select a number of secondary actions. For example, if the primary action is deleting the email that triggers a detection, the secondary action might be logging the detection and notifying the administrator.

The available primary actions depend on the type of policy category and scanner or filter settings you configure.

Note

Click **Reset**, to restore the actions to default settings for the policy category and scanner.

Primary actions

Action	Definition
Attempt to clean any detected virus or trojan	To clean the email containing a virus or trojan detected by the **Anti-Virus Scanner**.
Replace item with an alert	To replace the email that triggered the detection with an alert.
Delete embedded item	To delete the attachment that triggered the detection in an email.
Delete message	To delete the email that triggered the detection.
Allow through	To allow the email to continue to the next scanning phase or reach the end user.
Re-Submit	Resubmits the files for scanning when scan failure occurs.
Reject the Message	To reject the email and send a notification to the user.
Replace the attachment with an alert	To replace the attachment in an email message with an alert, if the **Mail Size Filtering** scanner is triggered when the attachment size exceeds.
Replace all attachments with a single alert	To replace the email message containing multiple attachments with a single alert, if the **Mail Size Filtering** scanner is triggered when the attachment count exceeds.

Action	Definition
Do not allow changes to break the signature	To stop TSME from breaking the signature, when an email message containing **Signed Content** is detected.
Allow changes to break the signature	To allow TSME to break the signature, when an email message containing **Signed Content** is detected.

Secondary actions

Action	Definition
Log	To record the detection in a log.
Quarantine	To store a copy of the email that triggered the detection, in the quarantine database. To view all quarantined items, go to **Detected Items** → **All Items** or the specific detection category. Select **Forward Quarantined email** to send the email to a specific reviewer or distribution list, based on the detection category. To configure notifications based on the detection category, go to **Settings & Diagnostics** → **Notifications** → **Settings** → **Advanced**. **Note:** The **Forward Quarantined email** option is not applicable for **Anti-Virus Scanner**.
Notify administrator	To send a copy of the email to the administrator specified under **Administrator E-mail** from **Settings & Diagnostics** → **Notifications** → **Settings** → **General**.
Notify internal sender	To send an alert message to the internal sender, if the original email originates within the Exchange server's Authoritative Domain.

Action	Definition
Notify external sender	To send an alert message to the sender, if the original email message does not originate within the Exchange server's Authoritative Domain.
Notify internal recipient	To send an alert message to the recipient, if the recipient is within the Exchange server's Authoritative Domain.
Notify external recipient	To send an alert message to the recipient, if the recipient is not within the Exchange server's Authoritative Domain.

Shared Resource

One common location to edit settings for scanners, filters, alerts, DLP and Compliance dictionaries, and time slots. When setting up policies, you might want the same resource (scanner and filter settings) applied to more than one policy. In such scenarios, use **Shared Resource**.

For example, if you want to use a different disclaimer for internal and external recipients, create different disclaimers for recipients and apply in the required subpolicy.

From the product 's user interface, click **Policy Manager** → **Shared Resource**. You can use these tabs:

- **Scanners & Alerts** — To edit or create new scanner and filter settings.
- **DLP and Compliance Dictionaries** — To edit or create new **DLP and Compliance Rules** and **File Filtering Rules**.
- **Time Slots** — To edit or create new time slots such as weekdays or weekends.

Note

Any changes made to these settings are applied automatically to all policies using these configurations.

Configure scanner settings

Create or modify scanner settings to suit your Exchange organization's requirement.

Task

1. **From the product's user interface, click Policy Manager → Shared Resource.**
   The **Shared Resources** page appears.
2. **Click Scanners & Alerts tab.**

3. **From the Category drop-down list under Scanners section, select the scanner you want to configure. The scanner type appears with the settings name, policies used by, and action to configure. You can use:**

   Option definitions

Option	Definition
Category	To select the required scanner that you want to configure.
Create New	To create new settings for a scanner based on your requirement. Required in a situation where you need exceptions for certain scanner settings and apply it in a policy.
Edit	To edit settings for the selected scanner.
Delete	To delete the scanner settings. **Note:** You cannot delete a scanner, if • It is a default scanner. • If it is used by any policy. To know, how many policies use this scanner setting, see the **Used By** column.

4. **Once you configure the scanner settings, click Save, then Apply.**

Results

You have now successfully configured the settings for a scanner, based on your Exchange organization's requirement.

Configure alert settings

Create or modify alert settings for the selected scanner to suit your Exchange organization's requirement.

Task

1. **From the product's user interface, click Policy Manager → Shared Resource.**
   The **Shared Resources** page appears.
2. **Click Scanners & Alerts tab.**
3. **From the Category drop-down list under Alerts section, select the alert you want to configure for a scanner. The scanner type appears with the settings name, policies used by, and action to configure. You can use:**

Option definitions

Option	Definition
Category	To select the required scanner that you want to configure.
Create New	To create new settings for a scanner based on your requirement. Required in a situation where you need exceptions for certain scanner settings and apply it in a policy.
View	To view the default alert settings for a scanner.
Edit	To edit settings for the selected scanner. For more information on the variables you can use in the alerts, refer to the *Notification fields that you can use* section.
Delete	To delete the scanner settings. **Note:** You cannot delete an alert, if • It is a default scanner alert. • If it is used by any policy. To know, how many policies use this alert setting, see the **Used By** column.

4. **Once you configure the scanner settings, click Save, then Apply.**

Results

You have now successfully configured the settings for an alert, based on your Exchange organization's requirement.

Create an alert

Create an alert message for actions taken by a scanner or filter.

Task

1. **From the product's user interface, click Policy Manager → Shared Resource.**

   The **Shared Resources** page appears.

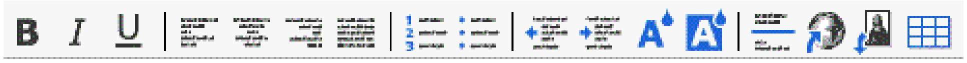
2. **Click Scanners & Alerts tab.**
3. **From the Category drop-down list under Alerts section, select the alert you want to configure for a scanner.**
4. **Click Create New.**

   The **Alert Editor** page appears.
5. **Type a meaningful Alert name.**
6. **Select the required Style, Font, Size, and Tokens from the respective drop-down lists.**

Note

These options are available only if you select **HTML content (WYSIWYG)** from the **Show** drop-down menu.

7. **Use any of these tools to customize your alert:**



Toolbar options

Options	Description
Bold	To make the selected text bold.
Italic	To make the selected text italic.
Underline	To underline the selected text.
Align Left	To left align the selected paragraph.
Center	To center the selected paragraph.
Align Right	To right align the selected paragraph.
Justify	To adjust the selected paragraph so that the lines within the paragraph fill a given width, with straight left and right edges.
Ordered List	To make the selected text into a numbered list.
Unordered List	To make the selected text into a bulleted list.

Options	Description
Outdent	To move the selected text a set distance to the right.
Indent	To move the selected text a set distance to the left.
Text Color	To change the color of the selected text.
Background Color	To change the background color of the selected text.
Horizontal Rule	To insert a horizontal line.
Insert Link	To insert a hyperlink where the cursor is currently positioned. In **URL**, type the **URL**. In **Text**, type the name of the hyperlink as you want it to appear in the alert message. If you want the link to open a new window, select **Open link** in new window, then click **Insert Link**.
Insert Image	To insert an image where the cursor is currently positioned. In **Image URL**, type the location of the image. In **Alternative text**, type the text you want to use in place of the image when images are suppressed or the alert message is displayed in a text-only browser. If you want to give the image a title, type the title name in **Use this text as the image title**. Click **Insert Image**.
Insert Table	To insert a table at the current cursor position. Type the values in **Rows**, **Columns**, **Table width**, **Border thickness**, **Cell padding**, and **Cell spacing** to configure the table, then click **Insert Table**.

8. **From the Show drop-down menu, specify how the alert message should be displayed within the user interface. You can select:**
    - **HTML content (WYSIWYG)** — To hide the underlying HTML code and display only the content of the alert message.
    - **HTML content (source)** — To display the alert message with the HTML code as it appears before compilation.

- **Plain-text content** — To display the content as plain text. You can use the following notification fields to include them in your alert message. For example, in your alert message, if you want the name of the detected item and the action taken when it was detected, use **%vrs%** and **%act%** on the **Alert Editor** page. For more information on the notification field options, see the *Notification fields that you can use* section.

  Tip

  Trellix recommends that you save the log files in plain text format so that the content can be viewed by any email client.

9. **Click Save to return to the policy page.**

Note

Click **Reset** to undo all changes you have made since you last saved the alert message.

Configure DLP and compliance rules

Create or modify DLP and Compliance rules and dictionaries, to suit your Exchange organization's requirement.

Task

1. **From the product's user interface, click Policy Manager → Shared Resource.**
   The **Shared Resources** page appears.
2. **Click DLP and Compliance Dictionaries tab.**
3. **From the Select a Language drop-down list under DLP and Compliance Rules section, select the language.**

Tip

You can also view and edit all supported locale dictionaries. (The supported locales are Chinese Simplified, French, German, Japanese, and Spanish.)

4. **From the Category drop-down list under DLP and Compliance Rules section, select the category you want to view or configure. The rules group appears with the name, policies used by, and action to configure. You can use:**

Option definitions

Option	Definition
Category	To select the required scanner that you want to configure. This release has 60 more DLP and Compliance dictionaries ensuring that email content is in accordance with your organization’s confidentiality and compliance policies.

Option	Definition
	Pre-defined Compliance Dictionaries include: • Addition of 60 new DLP and Compliance dictionaries • Support for industry specific compliance dictionaries - HIPAA, PCI, Source Code (Java, C++ etc.) These dictionaries are categorized as: • Score based — A rule is triggered when email exceeds the threshold score and maximum term count, resulting in reduced false positives. • Non-score based — A rule is triggered when a word or phrase is found in the email message.
New Category	To create a new **DLP and Compliance Rules** dictionary. **Note:** Any new category or condition that you create is non-score based.
Create New	To create new rules group for the selected category, based on your requirement. Required in a situation where you need specific rules to trigger a detection and apply it in a policy.
Edit	To edit settings for the selected **DLP and Compliance** rule.
Delete	To delete the **DLP and Compliance** rule.

Option	Definition
	Note: You cannot delete a **DLP and Compliance** rule, if • It is enabled. Deselect the rule, **Apply** the settings, then click **Delete**. • If it is used by any policy. To know, how many policies use this scanner setting, see the **Used By** column.

Note

For example, select **Credit Card Number** or any dictionary that suits your needs, from the **Category** drop-down list and see the enhanced **Rules Group** option available.

5. **To create a new rules group, click Create New for DLP and Compliance Rules for a selected category.**
   The **New DLP and Compliance Scanner Rule** page appears for the selected category.
6. **Type the Rule Name and Description for the rule.**
7. **Select Add this rule to this category's rules group to add the new rule to the rules group for the selected category.**
8. **Under Word or Phrase, specify the words or phrases to look for, in The rule will trigger when the following word or phrase is found. Then select one of the following options:**
   - **Regular Expression** — If enabled, the rule is triggered for specified text that is a regular expression (regex). Regex is a precise and concise method for matching strings of text, such as words, characters, or patterns of characters. For example, the sequence of characters "tree" appearing consecutively in any context, such as trees, street, or backstreet.

     Note

     - Regex is disabled for some phrases.
     - See http://www.regular-expressions.info/reference.html or http://www.zytrax.com/tech/web/regex.htm for more details.

   - **Use Wildcard** — If enabled, the rule is triggered for the specified word or phrase that contain wildcard characters. (Wildcard characters are often used in place of one or more characters when you do not know what the real character is or you do not want to type the entire name).
   - **Starts with** — If enabled, the rule is triggered for specified text that forms the beginning of the word or phrase.
   - **Ends with** — If enabled, the rule is triggered for specified text that forms the last part of the word or phrase.
   - **Case Sensitive** — If enabled, the rule is triggered if the case of the specified text matches the word or phrase.

Note

> To detect a word or phrase with exact match, select both **Starts with** and **Ends with** option.

9. Select Specify additional contextual words or phrases, which is a secondary action when the primary word or phrase is detected. Specify any additional word or phrase that can accompany the primary word or phrase that triggers a detection.
10. Select from Trigger if ALL of the phrases are present, Trigger if ANY of the phrases are present or Trigger if NONE of the phrases are present from the drop-down menu.
11. Select within a block of to specify the number of Characters from a block to be scanned.
12. Click Add Contextual word to type additional words or phrases.
13. Specify the word or phrase in Specify words or phrases, select one of the conditions (same options as in Step 7), then click Add.
14. Under File Format, select Everything to enable all file categories and its subcategories. You can select multiple categories and file types within the selected categories to be matched. Selecting All in the subcategory selector overrides any other selections that may have already been made.
15. If you have not selected Everything, then click Clear selections to deselect any of the selected file type options.
16. Click Save to return to Shared Resources page.
17. Click Apply to save the settings.

Results

You have now successfully configured the DLP and Compliance rules and dictionaries, to suit your Exchange organization's requirement.

Configure file filtering rules

Create new rules to detect files based on their name, type, or size. You can also choose to apply these rules only for password-protected files.

Before you begin

The file filtering rule triggers only when you select one condition. Make sure that you create an individual rule for each of these categories:

- File name
- File category
- File size

Note

> This task provides information on configuring all three categories. Based on your Exchange organization's requirement, select only one category for a file filtering rule and create separate rules for each category. If a rule contains multiple criteria such as **File name filtering**, **File category filtering**, and **File size filtering**, all criteria must be satisfied to trigger the rule.

Task

1. From the product's user interface, click Policy Manager → Shared Resource.

2. **Click DLP and Compliance Dictionaries tab.**
3. **From File Filtering Rules, click Create New.**
4. **Type a unique Rule name. Give the rule a meaningful name, so that you can easily identify it and what it does. For example, Files Over 5MB or Block MPP files.**
5. **Enable Evaluate items inside archive files.**

> **Note**
>
> Select this option, if the File Filter rule is applicable for scanning archive files. By selecting this rule, the subsequent File Filter rules are applied on archive files.

6. **Select Apply rule only for password-protected files.**
   You can enable this feature to filter **File Filtering Rules** rules between password-protected files and non-password protected files.
7. **In the File Filtering Rule page, you can use:**

Option definitions — filename filtering

Option	Definition
Enable file name filtering	To enable file filtering according to the file names.
Take action when the file name matches	Specify the name of the files that triggers this rule. You can use wildcard characters (* or ?) to match multiple file names. For example, if you want to filter any Microsoft PowerPoint files, type `*.ppt`.
Add	To add the file name specified under **Take action when the file name matches**, to the file name filtering list.
Edit	To edit or modify an existing file filtering rule.
Delete	To remove the file name from the filter list. **Note:** You cannot delete a file filtering rule, if it is used by any policy. The **Used By** column must display **0 policies** for the rule that you want to delete. You must first remove the file filtering rule from the policy, then click **Delete**.

Option definitions — File category filtering

Option	Definition
Enable file category filtering	To enable file filtering according to their file type.
Take action when the file category is	Specify the type of files that affects this rule. **Note:** File types are divided into categories and subcategories.
File categories	Select a file type category. An asterisk symbol (*) appears next to the file type, to indicate that the selected file type will be filtered.
Subcategories	Select the subcategory you want to filter. To select more than one subcategory, use **Ctrl**+**Click** or **Shift**+**Click**. To select all of the subcategories, click **All**. Click **Clear selections** to undo the last selection.
Extend this rule to unrecognized file categories	To apply this rule to any other file categories and subcategories that are not mentioned in the categories and subcategories list.
Apply rule only for password protected files	To enable file filtering rules only for password-protected files.

Important

To allow through the password-protected .zip files that contains restricted files, make sure that the **Password protected bypass rule** appears as a first rule in the list.

Option definitions — File size filtering

Option	Definition
Enable file size filtering	To filter files according to their file size.

Option	Definition
Take action when the file size is	Specify a value in the adjacent text box and drop-down list, then select: • **Greater than** — To specify that the action should only be applied if the file is larger than the size specified. • **Less than** — To specify that the action should only be applied if the file is smaller than the size specified.

8. **Click Save to return to the Shared Resources page.**
9. **Click Apply to create the file filtering rule.**

Results

You have now successfully created a file filtering rule, to suit your Exchange organization's requirement.

Configure time slots

Set up different time slots or configure existing time slots that can be applied to policies, based on your Exchange organization's requirement.

Time Slots enable you to specify the time during which certain rules must be triggered. For example, you might want to restrict large file upload or download during office hours.

There might be situations where you require more time slots, based on different users, their geographical locations, or working hours. You can create more time slots based on business hours, non-business hours, weekly maintenance, and so on.

By default, TSME has these time slots:

- **All the time**
- **Weekdays**
- **Weekends**

Note

You cannot delete or edit the default time slot **All the time**, as the **Primary policy** uses it.

Task

1. **From the product's user interface, click Policy Manager → Shared Resource.**
   The **Shared Resources** page appears.
2. **Click Time Slots tab.**

3. **Click Create New.**

   The **Time Slot** page appears.
4. **Type a unique Time slot name such as Business hours or System Maintenance (Weekly).**
5. **Under Select day and time, select the required days.**
6. **Select All day or Selected hours.**
7. **Specify the Start and End time from the drop-down list, if you choose Selected hours.**
8. **Click Save to return to the Shared Resources page.**
9. **Click Apply to save the settings.**

Results

You have now successfully configured or created a time slot, to suit your Exchange organization's requirement.

Manage core scanner settings for a policy

Create or edit scanner options, then specify an appropriate action to take on the detected item when a policy is triggered.

The available core scanners are:

- **Anti-Virus Scanner**
- **DLP and Compliance Scanner**
- **File Filtering**

Configure anti-virus scanner settings

Configure **Anti-Virus Scanner** settings in a policy to identify, thwart, eliminate computer viruses and other malware.

Task

1. **From Policy Manager, select a submenu item that has the anti-virus scanner.**

   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Anti-Virus Scanner.**
4. **In Activation, select Enable to activate the anti-virus scanner settings for the selected submenu item.**

Note

- If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
- If you add a new scanner to the policy, you can specify a time slot when to enable the scanner, using **What time would you like this to apply** drop-down list.

5. **From the Options section, you can use:**

Option	Definition
High Protection	To scan all files, archive files, unknown viruses, unknown macro viruses, mass mailers, potentially unwanted programs, and scan all files for macros.
Medium Protection	To scan all files, archive files, unknown viruses, unknown macro viruses, mass mailers, and potentially unwanted programs.
Low Protection	To scan only default file types, archive files, mass mailers, and potentially unwanted programs.
<create new set of options>	To create your customized anti-virus scanner settings.
Edit	To edit the existing level of protection.

6. **If you select to edit or modify the scanner settings, in Instance name, type a unique name for the anti-virus scanner setting instance. This field is mandatory.**
7. **In Basic Options tab under Specify which files to scan, select one of these options:**
    - **Scan all files** — To specify that all files to scan regardless of their type.
    - **Default file types** — To specify that only the default file types to scan.
    - **Defined file types** — To specify which file types to scan.
8. **Select more scanner options available in Scanner options. You can select:**
    - **Scan archive files (ZIP, ARJ, RAR...)**
    - **Find unknown file viruses**
    - **Find unknown macro viruses**
    - **Enable McAfee Global Threat Intelligence file reputation** — This enables the threat intelligence gathered by **Trellix** Labs that would prevent damage and data theft before a signature update is available. Select the Sensitivity level from the options available.
    - **Scan all files for macros**
    - **Find all macros and treat as infected**
    - **Remove all macros from document files**

Note

> The **Find all macros and treat as infected** and **Remove all macros from document files** options have a combined functionality. When you select **Find all macros and treat as infected**, the **Remove all macros from document files** option is selected automatically. When you enable this option, all macros in the attachments are treated as infected.

9. **On the Advanced tab under Custom malware categories, specify the items to be treated as malware. There are two ways to select malware types:**
    - Select the malware types from the list of check boxes.
    - Select **Specific detection names**, type a malware category, then click **Add**.

    Note

    > When typing a malware category name, you can use wildcards for pattern matching.

10. **Select the Do not perform custom malware check if the object has already been cleaned option, if the cleaned items must not be subjected to the custom malware check.**
11. **In Clean options, specify what happens to files that are reduced to zero bytes after being cleaned. Select any one of these options:**
    - **Keep zero byte file** — To keep files that have been cleaned and is of zero bytes.
    - **Remove zero byte file** — To remove any file that has zero bytes after being cleaned.
    - **Treat as a failure to clean** — To treat zero-byte files as if they cannot be cleaned, and apply the failure to clean action.
12. **In Packers tab, select:**
    - **Enable detection** — To enable or disable the detection of packers.
    - **Exclude specified names** — To specify which packers can be excluded from being scanned.
    - **Include only specified names** — To specify which packers you want the software to detect.
    - **Add** — To add packer names to a list. You can use wildcards to match names.
    - **Delete** — To remove packer names you have added. This link is activated if you click **Add**.
13. **In PUPs tab, select:**
    - **Enable detection** — To enable or disable the detection of potentially unwanted programs. Click the disclaimer link and read the disclaimer before configuring potentially unwanted programs detection.
    - **Select the program types to detect** — To specify whether each type of potentially unwanted programs in the list to be detected or ignored.
    - **Exclude specified names** — To specify which potentially unwanted programs can be excluded from being scanned. For example, if you have enabled spyware detection, you can create a list of spyware programs that you want the software to ignore.
    - **Include only specified names** — To specify which potentially unwanted programs you want the software to detect. For example, if you enable spyware detection and specify that only named spyware programs should be detected, all other spyware programs are ignored.
    - **Add** — To add potentially unwanted programs names to a list. You can use wildcards to match names.

  - **Delete** — To delete potentially unwanted programs names that you have added. This link is activated if you click **Add**.

  Note

  > The McAfee Threat Intelligence website contains a list of recent malware names. Use **Search the Threat Library** to view information about specific malware.

14. **Click Save to return to the policy page.**
15. **In Actions to take, click Edit. In these following tabs, specify the anti-virus scanner actions that must be taken if a virus (or virus-like behavior) is detected:**
    - **Cleaning** — Select **Attempt to clean any detected virus or trojan** to activate various actions. Select the actions to be taken from:
      - **Log**
      - **Quarantine**
      - **Notify administrator**
      - **Notify internal sender**
      - **Notify external sender**
      - **Notify internal recipient**
      - **Notify external recipient**
    - **Default Actions** — From **Take the following action** drop-down list, select an action.
      - **Replace item with an alert**
      - **Delete embedded item**
      - **Delete message**
      - **Allow through**

    Note

    > For more information on the primary and secondary actions, see the *Actions you can take on detections* section.

16. **Select the corresponding alert document or click Create to make a new alert document. From And also, select more actions to be taken for these tabs:**
    - **Custom Malware**
    - **Packers**
    - **PUPs**
17. **Click Save to apply the settings and return to the policy settings page.**
18. **Click Apply to configure these settings to a policy.**

Configure DLP and compliance scanner settings

Configure **DLP and Compliance Scanner** settings in a policy to identify noncompliant textual data in an email or attachment and take necessary actions.

Task

1. **From Policy Manager, select a submenu item that has the DLP and Compliance scanner.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click DLP and Compliance Scanner.**
4. **In Activation, select Enable to activate the DLP and compliance scanner settings for the selected submenu item.**

   Note

   - By default, all scanner setting options are disabled for **DLP and Compliance Scanner**.
   - If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
   - If you add a new scanner to the policy, you can specify a time slot when to enable the scanner, using **What time would you like this to apply** drop-down list.

5. **In Options, you can use:**
   - **Include document and database formats** — To scan documents and database formats, for noncompliant content.
   - **Scan the text of all attachments** — To scan the text of all attachments.
   - **Create** — To create an alert message when the content of an email message is replaced due to a rule being triggered. See *Create an alert* for more instructions.
   - **View/Hide** — To display or hide the preview of the alert message. If the preview is hidden, clicking this link displays it. If the preview is displayed, clicking this link hides it.
6. **In DLP and Compliance rules and associated actions, click Add rule.**
   The **DLP and Compliance Rules** page appears.
7. **In Specify actions for rule, select the language from the Select a Language drop-down menu.**
   You can also view and edit all supported locale dictionaries. (The supported locales are Chinese Simplified, French, German, Japanese, and Spanish.)
   For example, when **TSME** is installed in the German locale, you can still view and edit other supported locale dictionaries. Any new category that you create is available for all supported locales.
8. **In Specify actions for rule, select a rule group from the Select rule group drop-down menu that triggers an action, if one or more of its rules are broken. Each phrase can have a Score set for a category, under DLP and Compliance Scanner Phrase.**
   For some rule groups, you might need to specify these options:
   - **Threshold score** — To specify the maximum threshold score upon which the scanner triggers.
   - **Max Term Count** — To specify the maximum number of times this rule group can be triggered. Exceeding this count triggers the scanner to take the specified action.

The equation for current **Threshold score** = **Score** x Term Count (instance). A rule is triggered when the value equals or exceeds the **Threshold score**.

To understand how **Threshold score** and **Max Term Count** helps in triggering a rule, let us consider an example on Pascal Language dictionary. Consider that you have set the **Score** for the **DLP and Compliance Scanner Phrase** "PAnsiChar" to `5`.

Under **Select rule group**, if you have selected **Pascal Language** dictionary, and set the value for:

- **Threshold score** = 15
- **Max Term Count** = 4

If "PAnsiChar" is found twice in the code, the current threshold score becomes 10, and the rule is not triggered.

If "PAnsiChar" is found five times in the code, the current threshold score will still be calculated as **Score** x **Max Term Count** which is 5 * 4 = 20. This value is greater than the defined threshold score. So, the rule is triggered.

Consider that you have modified the **Score** for "PAnsiChar" to `8`. If the phrase "PAnsiChar" is found thrice in the code, the current threshold score becomes 24. Now the rule will be triggered as it exceeded the specified **Threshold score**.

If there are multiple rules, the **Threshold score** is the combined value of all the rules for a dictionary.

Note

A rule will be triggered only when the value equals or exceeds the **Threshold score** and is not triggered even if the instance of phrase exceeds the **Max Term Count** value in an email.

9. **From If detected, take the following action:, select the DLP and compliance scanner actions that must be taken if some content in an email message is detected as noncompliant.**
10. **From And also, select one or more actions.**
11. **Click Save to apply the settings and return to the policy settings page.**
12. **Click Apply to configure these settings to a policy.**

Configure file filtering settings

Configure settings in a policy to detect files based on their name, type, or size and take necessary actions.

Task

1. **From Policy Manager, select a submenu item that has the File Filtering scanner.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click File Filtering.**
4. **In Activation, select Enable to activate the file filtering scanner settings for the selected submenu item.**

Note

> - If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
> - If you add a scanner to the policy, you can specify a time slot when to enable the scanner, using **What time would you like this to apply** drop-down list.

5. **Select Scan for Embedded files to scan embedded emails.**
6. **In Alert Selection, click:**
   - **Create** — To create an alert message when the attachment of an email message is replaced due to a rule being triggered. See *Create an alert* for more instructions.
   - **View/Hide** — To display or hide the preview of the alert message. If the preview is hidden, clicking this link displays it. If the preview is displayed, clicking this link hides it.
7. **In File filtering rules and associated actions, from the Available rules drop-down menu, select an available rule. If you want to create new file filtering rules, select <Create new rule...>. See *Configure file filtering rules* for more instructions on how to create new file filtering rules.**

   File filtering settings can block restricted files such as .exe files that come as an email attachment. If the .exe file is sent as a password-protected .zip file, although the **Password-Protected Files** setting is configured to allow the file, the file filtering rule can block the file.

   Sometimes you might need to allow the legitimate restricted files that come as a password-protected .zip file. To allow the password-protected .zip file that contains restricted files such as .exe files, you must add the **Password protect bypass rule** from the **Available rules** drop-down list.

   Important

   > Make sure that this rule is the first rule in the list. If the rule is already listed at a different level, delete the rule, then select the rule from the **Available rules** drop-down list.

   Note

   > Make sure that you create separate file filtering rules for each category such as file name, type, and size. You can also opt to apply these rules only for password-protected files.

8. **Click Change to specify actions that must be taken when a file/attachment in an email message triggers the scanner.**
9. **Click Delete, to remove an existing rule from the policy.**
10. **Click Apply to configure these settings to a policy.**

Configure mail URL reputation settings

Configure the **Mail URL reputation** settings to detect malicious URLs in the email body.

When enabled, **TSME** scans each URL in the email body, gets the reputation score, compares the score with the defined threshold, and takes appropriate action. When the **Mail URL reputation** option is enabled, the Reputation score of all URLs in the email is displayed in the message details of the email.

TSME validates the message before it enters the organization, by removing the URLs from the email body. The product validates whether the URLs reputation has exceeded the defined threshold and takes action on the email according to the configuration.

Enabling this feature protects your system from threats such as denial-of-service (DoS) attack, phishing links, URLs that contain malware, or unwanted URLs.

The Mail URL reputation feature is available for these policies:

- **On-Access**
- **On-Demand default**, and
- **On-Demand (Full Scan)**

Depending on the configuration option that you selected during the software installation, the mail URL reputation is enabled or disabled by default for policies:

- For the **Default configuration** — Disabled for all policies.
- For the **Enhanced configuration** — Enabled only for on-access scanning policies.

When you enable the **Mail URL Reputation** for first time, the software downloads the local cache of URLs from the **Trellix GTI** server.

For each URL, the software checks with the local database for reputation score and takes appropriate action according to the configuration. If the reputation score is not available in the local database, the software gets the score from the **Trellix GTI** server. The software checks with the **Trellix GTI** server and updates the local database at regular intervals. If the local database is not updated for 30 days, the software downloads the entire database during the next update. Otherwise, the update is incremental. By default, the local database is updated once everyday. You can't modify the storage location of the database.

Note

You can't update the local database using **Trellix ePO - On-prem** because the server needs direct Internet connections. However, if you use the proxy server, the same configuration can be used to download the URL database.

Task

1. **From Policy Manager, select a submenu item that has the Mail URL Reputation scanner.**

   Remember:

   The **Mail URL Reputation** protection is available only for **On-Access**, **On-Demand (Default)**, and **On-Demand (Full Scan)** policies.

2. **Click Primary policy or any Sub-policy that you want to configure, click List All Scanners tab, then click Mail URL Reputation.**
3. **From Activation, select Enable.**
    - If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
    - If you add a scanner to the policy, you can specify when to enable the scanner, using **What time would you like this to apply** drop-down list.
4. **From the Options drop-down list, you can select:**
    - **Default Mail URL Settings** — To apply the default threshold values.
    - **Create new set of options** — To define the thresholds value as required.

Remember:

If you edit the existing settings, make sure that you provide a unique **Instance name** for the scanner settings.

5. **To define the scanner settings, select Create new set of options.**
6. **On the Mail URL Reputation page, define these values, then click Save.**
    - **Instance name**
    - **Higher URL reputation threshold**
    - **Lower URL reputation threshold**
    - **Maximum number of URLs per email**

Important

The **Higher URL reputation threshold** value must always be greater than the **Lower URL reputation threshold** value.

Note

If a URL appears multiple times, the URL counted is 1 and not the number of occurrence. For example, if the email contains 50 URLs and one URL appears 20 times, the sum of URL is 31 and not 50.

7. **From the Actions to take section, click Edit to define the actions.**

Note

You can also apply the default settings.

8. **On the Mail URL Reputation Actions page, define these settings for When Mail URL reputation score is above the higher threshold, When Mail URL reputation score is above the lower threshold, and When Mail URL lookup count exceeds the limit.**

a. **From the Take the following action drop-down list, select:**

- **Replace item with an alert**.
- **Delete message**.
- **Allow through**.

When you select **Replace item with an alert**, select the alert format:

- **Default Mail URL Reputation Alert** — To use the default alert message.
- **Create** — To define the alert message as you required. Type a unique name for the **Alert name**, define the alert message, define the text format from the **Show** drop-down list, then click **Save**.

Tip

Trellix recommends that you save the alerts in plain text format, so that the text content can be viewed by all email client.

b. **From the And also section, define these options:**

- **Log**
- **Quarantine**
- **Forward Quarantined email**
- **Notify administrator**
- **Notify internal sender**
- **Notify external sender**
- **Notify internal recipient**
- **Notify external recipient**

Tip

For definitions of each of these options, see *Actions you can take on detections*.

9. **Click Save to apply the settings and return to the policy settings page.**
10. **Click Apply to implement these settings to a policy.**

Note

You can view the detected URLs from the **Detected Items** | **Mail URL Reputation** page. Under **View Results** section, you can view the list of detected URLs. Click the **Blocked URLs** under the **Banned Phrases** column for detailed view.

Higher and Lower URL reputation threshold examples

Set the **Higher URL reputation threshold** value to `80` and the **Lower URL reputation threshold** value to `50`. If the reputation score of the URL is:

GTI reputation score is	Action
Greater than 80	Action is taken according to the Mail URL reputation settings.
Lesser than 50	**TSME** allows the email with the URL.
Between 50 and 80	**TSME** suspects that the URL could be malicious and takes action according to the settings.

Tip

The **Highly Suspect** threshold value detects the most dangerous malicious URLs. As you decrease the threshold value, the chances to get false positive are high. False positive – A URL might be legitimate, but the database considers it as a potential malicious URL.

TIE Reputation check for email attachments

TSME now provides additional threat detection capability by leveraging the **TIE** reputation check for attachments that are coming through emails at gateway and mailbox levels. When you enable the **TIE** Reputation check, you can select file types that should be submitted for TIE reputation score.

What is TIE?

Threat Intelligence Exchange increases the protection and detection capabilities in real time by performing a comprehensive and advanced file reputation check, and prevents the threat spreading. The **TIE** server quickly analyzes the attachments at the gateway and mailbox level. For information about **Threat Intelligence Exchange**, see ***Threat Intelligence Exchange** 2.0 Product Guide.*

The **TIE** reputation is based on two variants:

- Certification reputation
- File reputation

TIE validates the file for certificate reputation score first. If only the certificate reputation is known malicious, the file reputation score is considered.

How TSME works with TIE

When TIE is enabled in the policy settings, after applying File Filtering rules, **TSME** checks the reputation of the email attachments with the **TIE** server. Based on the **TIE** reputation for the file, the scores are mapped to one of these categories, and **TSME** takes action according to the configuration defined for that category:

- Known trusted - 99

- Most likely trusted - 85
- Might be trusted - 70
- Unknown - 50
- Might be malicious- 30
- Most likely malicious - 15
- Known malicious - 1

When you configure an action for a specific category, the same action is applied for all categories that have a **TIE** reputation score lower than the specified category. By default, **Take actions at and below** is set to **Might Be Malicious**.

For example, when you set **Take action at and below** to **Unknown** and action as **Replace with Alert** for files that have a score of 50, all attachments with a **TIE** reputation score of 50 or less are replaced with an alert message. You can also select secondary actions for alert.

The reputation scores are locally cached and **TSME** can use the updated local cache for reputation checks.

When **TIE** is disabled, scanning action is taken according to the policy settings. When **TIE** is enabled but the **TIE** server is unreachable, and the local cache doesn't contain entries for the file, the reputation check from **TIE** is skipped and email is scanned according to the policy settings.

For more information about how the reputation score is mapped, see the ***TIE** Product Guide*.

TSME sends only the following file types for **TIE** reputation check:

- exe
- pdf
- Microsoft Office documents

For a list of supported file types, see KB89578.

Note

When the email contains a compressed attachment, the compressed file is extracted and only the supported file types in the attachment are sent for **TIE** reputation check. For a list of supported compressed file types, see KB89577.

For other types of files and post **TIE** reputation check, **TSME** scans the attachments according to the policy settings. When you release the quarantined item under TIE detections, the file is only scanned for viruses before allowing it. You can view the number of files detected by **TIE** and the number of files sent to ATD check information on the Dashboard page.

Filtering File types for TIE

Use this feature to filter file types that need to be submitted for TIE Reputation score. You can either submit the attached PDF in the mail or select all any of the other files including Microsoft Word, Microsoft Excel, or Microsoft Powerpoint for TIE Reputation check.

For example: if you want to submit scanning request only for PDFs and Microsoft Excel files, click the checkbox of both of these files.

When you select **File types for TIE Reputation**, **TSME** sends only those files for File Reputation score.

- You can configure **File types for TIE Reputation** from **Settings & Diagnostics** → **TIE Settings**.

You can also enable the **Intelligent Sandbox** detection on selected reputation categories of files and based on the size of the attachment.

When a file is checked for **TIE** reputation, TIE returns the reputation score and might recommend the file for analysis. **TSME** sends the file to **Intelligent Sandbox** based on the category and file size configured in the settings. If there is a revised reputation score for the file, the local cache is updated with that reputation score. The revised score will be used from the next lookup. The default setting for **Take action at and below** is **Might Be Malicious** and **File Size** is 8 MB.

Recommended settings for TIE server deployment for TSME

Trellix recommends that you:

- Deploy a **TIE** server in secondary configuration to process all TIE reputation requests from **TSME** in the same data center as your Exchange server. This enables the **TIE** server to process maximum email attachments per second in a dedicated infrastructure.

  Note

  Each email attachment sent for TIE reputation will invoke maximum of 2 **TIE** requests.

- The reputation traffic is reduced when the **TSME** servers cache the reputations locally. But, since **TSME** clears the local cache after service restart, spikes might be experienced.
- Estimate the requests coming from **TSME** using the dashboard counters in **TSME**. For information about how to measure requests per second coming to a TIE server, view the **Throughput** under **Performance Status** in the **TIE Server Topology Management** page under Server Settings in **Trellix ePO - On-prem**. You can also view the **TIE Server New Files** in the **TIE Server Data Cleanup** page.

Configure TIE settings to scan email attachments

Enable TIE reputation check for email attachments based on the file reputation category.

Task

1. **From the product's interface, click Settings & Diagnostics → TIE Settings.**
2. **Select one item from the Take actions at and below drop-down list.**
    - **Known Trusted** — The reputation for the file is 99.
    - **Most Likely Trusted** — The reputation for the file is 85.
    - **Might Be Trusted** — The reputation for the file is 70.
    - **Unknown** — The reputation for the file is 50.
    - **Might Be Malicious** — The reputation for the file is 30.

Note

> By default, **Might Be Malicious** is selected.

- **Most Likely Malicious** — The reputation for the file is 15.
- **Known Malicious** — The reputation for the file is 1.

3. **In Take the following action, define these settings as required.**
    - **Replace item with an alert** — Replaces the item with an alert message and logs, quarantines, or notifies as defined in **And also**.
    - **Delete embedded item** — Deletes the attachment in the email and logs, quarantines, or notifies as defined in **And also**.
    - **Delete the message** — Deletes the email and logs, quarantines, or notifies as defined in **And also**.
4. **In And also, configure these settings as required.**
    - **Log**
    - **Quarantine**
    - **Forward Quarantined email**
    - **Notify administrator**
    - **Notify internal sender**
    - **Notify external sender**
    - **Notify internal recipient**
    - **Notify external recipient**
5. **In Submit files to ATD at and below, select the category and the file size for Intelligent Sandbox reputation.**

Resubmit files for scanning

You can enable the **Re-Submit** option to scan files during scan failures.

Follow these steps to use the **Re-Submit** option when scan failure occurs.

Task

1. **On the product's menu page, select Settings & Diagnostics, and then click On-Access Settings.**
2. **Select Re-Submit option for both On Generic Scan Failure and On Product Scan Failure, from the General section.**
   When you select the **Re-Submit** option, **TSME** submits the files for rescanning.

Manage filter settings for a policy

Enable or disable filter options, then specify an appropriate action to take on the detected item when a policy is triggered.

The available filters are:

- **Corrupt Content**
- **Protected Content**
- **Encrypted Content**
- **Signed Content**
- **Password-Protected Files**

- **Mail Size Filtering**
- **Scanner Control**
- **MIME Mail Settings**
- **HTML Files**

Configure corrupt content settings

Configure settings in a policy to identify emails with corrupt content and take necessary actions.

The content of some email messages can become corrupt and cannot be scanned. Corrupt content policies specify how email messages with corrupt content are handled when detected.

Task

1. **From Policy Manager, select a submenu item that has the filter.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Corrupt Content.**

   Note

   If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Actions, click Edit to specify the filter actions that must be taken when corrupt content is detected.**
5. **Click Save to return to the policy page.**
6. **Click Apply to configure these settings to a policy.**

Configure protected content settings

Configure settings in a policy to identify emails with protected content and take necessary actions.

Protected content policies specify how email messages with protected content are handled when detected.

Task

1. **From Policy Manager, select a submenu item that has the filter.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Protected Content.**

   Note

   If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Actions, click Edit to specify the filter actions that must be taken when protected content is detected.**

5. **Click Save to return to the policy page.**
6. **Click Apply to configure these settings to a policy.**

Configure encrypted content settings

Configure settings in a policy to identify emails with encrypted content and take necessary actions.

Email messages can be encrypted to prevent access by unauthorized parties. Encrypted content uses a key and encryption mathematical algorithms to decrypt it. Encrypted content policies specify how encrypted email messages are handled when detected.

Task

1. **From Policy Manager, select a submenu item that has the filter.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Encrypted Content.**

   Note

   If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Actions, click Edit to specify the filter actions that must be taken when encrypted content is detected.**
5. **Click Save to return to the policy page.**

   Note

   Encrypted content settings are applicable to encrypted attachments in internal emails and to encrypted internet email messages.

6. **Click Apply to configure these settings to a policy.**

Configure signed content settings

Configure settings in a policy to identify emails with signed content and take necessary actions.

Whenever information is sent electronically, it can be accidentally or willfully altered. To overcome this issue, some email software use a digital signature — the electronic form of a handwritten signature.

A digital signature is extra information added to a sender’s message that identifies and authenticates the sender and the information in the message. It is encrypted and acts like a unique summary of the data. Typically, a long string of letters and numbers appears at the end of a received email message. The email software then re-examines the information in the sender’s message, and creates a digital signature. If that signature is identical to the original, the data has not been altered.

If the email message contains a virus, bad content, or is too large, the software might clean or remove some part of the message. The email message is still valid and can be read, but the original digital signature is 'broken'. The recipient cannot rely on the contents of the email message because the contents might also have been altered in other ways. Signed content policies specify how email messages with digital signatures are handled.

Task

1. **From Policy Manager, select a submenu item that has the filter.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Signed Content.**

> **Note**
>
> If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Actions, click Edit to specify the filter actions that must be taken when signed content is detected.**
5. **Click Save to return to the policy page.**

> **Note**
>
> Signed content settings are applicable to signed emails and attachments.

6. **Click Apply to configure these settings to a policy.**

Configure password-protected file settings

Configure settings in a policy to identify emails with password-protected archives and take necessary actions.

Password-protected files cannot be accessed without a password and cannot be scanned for malware. Password-protected files' policies specify how email messages that contain a password-protected file are handled.

Task

1. **From Policy Manager, select a submenu item that has the filter.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Password-Protected Files.**

> **Note**
>
> If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Actions, click Edit to specify the filter actions that must be taken when an email message containing password-protected file is detected.**

   Important

   If you set the action as **Allow through**, make sure that the **Password protected bypass rule** under **File filtering rules and associated actions** in **File filtering** scanner settings is the first rule in the list. If the rule is already listed at a different level, delete the rule, then select the rule from the **Available rules** drop-down list.

5. **Click Save to return to the policy page.**
6. **Click Apply to configure these settings to a policy.**

Configure mail size filtering settings

Mail size filtering settings in a policy detect emails based on their size, number of attachments, and attachment size.

Before you begin

Make sure that on the **On-Access Settings** page, the **Scan Inbound Mails** and **Scan Outbound Mails** options are selected.

You can configure mail size filtering settings for **On-Access** policy separately. Configure the **On-Access** settings for outbound emails. For example:

- To block all outbound emails that contain more than three attachments, configure the **Mail Size Filtering** settings from **On-Access** policy.

Note

Mail size filtering for on-access scanning is not applicable for mailbox server role.

Task

1. **From Policy Manager, select a submenu item that has the anti-virus scanner.**
   The policy page for the submenu item appears.
2. **Select the policy as required from On-Access.**
3. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
4. **Click Mail Size Filtering.**
5. **In Activation, select Enable to activate the email size filter settings for the selected submenu item.**

   Note

   If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

6. **In Options, you can use:**

- **Default Settings** — To view a summary of the mail size option set that is used by default.
- **<create new set of options>** — To configure mail size filtering options. The options are:
  - **Instance name** — Type a unique name for the mail size filter setting instance. This field is mandatory.
  - **Maximum overall mail size (KB)** — Specify the maximum size (in kilobytes) that an email message can be. You can specify a value from 2 KB to 2 GB, where the default value is 20,000 KB.
  - **Maximum attachment size (KB)** — Specify the maximum size (in kilobytes) that the attachments of an email message can be. You can specify a value from 1 KB to 2 GB, where the default value is 4096 KB.
  - **Maximum number of attachments** — Specify the maximum number of attachments an email message can have. You can specify up to 999, where the default value is 25.
- **Edit** — To edit the selected option set.

7. **In Actions, click Edit. Specify the mail size filter actions to take, if the value exceeds the specified settings for these options:**
   - **Message Size**
   - **Attachment Size**
   - **Attachment Count**
8. **Click Save to return to the policy page.**

Note

Internal emails are not detected by mail size filtering rules.

Configure scanner control settings

Configure settings in a policy that defines the nesting level, expanded file size, and maximum scan time that is allowed, when an email is scanned.

Task

1. **From Policy Manager, select a submenu item that has the scanner.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Scanner Control.**

Note

If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Options, click <create new set of options>.**
5. **In Instance name, type a unique name for the scanner control filter setting instance. This field is mandatory.**

6. **In Maximum nesting level, specify the level to which the scanner should scan, when an attachment contains compressed files, and other compressed files within. You can specify a value from 2–100, where the default value is 10.**
7. **In Maximum expanded file size (MB), specify the maximum size allowed for a file when it is expanded for scanning. You can specify a value from 1–2047, where the default value is 10.**
8. **In Maximum scan time (minutes), specify the maximum time allowed to scan any file. You can specify a value from 1–999, where the default value is 1.**
9. **Click Save to return to the policy page.**
10. **In Alert selection, you can select which alert to use when a scanner control option is triggered. You can use:**
    - **Create** — To create a new alert message for this policy.
    - **View/Hide** — To display or hide the alert text. If the text is hidden, clicking this link displays it. If the text is displayed, clicking this link hides it.
11. **In Actions, click Edit to specify the actions to take, if the value exceeds the specified settings for these options:**
    - **Maximum nesting level**
    - **Maximum expanded file size (MB)**
    - **Maximum scanning time (minutes)**
12. **Click Save to return to the policy page.**
13. **Click Apply to configure these settings to a policy.**

Block IP addresses manually

You can block a specific IP address or a range of IP addresses from sending emails to your organization irrespective of their IP address reputation. To enable this option, you must update the following registry.

Before you begin

Blocking IP addresses manually can be used only on Exchange roles, Edge, and MailBox.

Task

1. **On the system where TSME is installed, navigate to this registry key:**
   `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\McAfee\MSME\SystemState`
2. **Add the String value `IPBlackList`.**
3. **Assign the IPv4 address that you want to block from sending emails.**
   You can block multiple IP addresses using a semicolon. You can also block a range of IP addresses using the wildcard `*`. For example:
    - `10.21.22.*` — Blocks all IP addresses from `10.21.22.0` to `10.21.22.255`
    - `10.21.*.*` — Blocks all IP addresses from`10.21.0.1` to `10.21.255.255.`

Configure MIME mail settings

Configure settings in a policy to identify encoded MIME messages and take necessary actions.

Multipurpose Internet Mail Extensions (MIME) is a communications standard that enables the transfer of non-ASCII formats over protocols (such as SMTP) that supports only 7-bit ASCII characters.

MIME defines different ways of encoding the non-ASCII formats so that they can be represented using characters in the 7-bit ASCII character set.

Task

1. **From Policy Manager, select a submenu item that has the filter.**

   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click MIME Mail Settings.**

Note

If you add a new filter to the policy, you can specify a time slot when to enable the filter, using **What time would you like this to apply** drop-down list.

4. **In Options, select <create new set of options>.**

   The **Mail Settings** page appears.
5. **In Instance name, type a unique name for the MIME email filter setting instance. This field is mandatory.**
6. **In Options tab, type a Prefix to message subject.**
   a. **In Preferred re-encoding of attachments in a MIME message, select a re-encoding method that is used when re-encoding attachments in MIME messages from the options available.**
   b. **In Preferred re-encoding of modified subject headers, select a re-encoding method that is used when re-encoding the subject headers in the MIME messages from the options available.**
   c. **In If re-encoding a subject header fails, select one of these options:**
      - **Treat as an error** — If the MIME message is bounced.
      - **Fallback to UTF-8** — If the MIME message is encoded into UTF-8.
7. **In Advanced tab, select one of these encoding methods to use while encoding the text part of an email message:**
   - **Quoted-Printable**, which is best suited for messages that mainly contain ASCII characters, but also contains some byte values outside that range.
   - **Base64**, which has a fixed overhead and is best suited for non-text data, and for messages that do not have a lot of ASCII text.
   - **8-Bit**, which is best suited for use with SMTP servers that support the 8BIT MIME transport SMTP extension.

Note

You can perform *step 6b* only if you select **Re-encode using the original encoding scheme** or **Re-encode using the following character set** from **Preferred re-encoding of modified subject headers**.

   a. **Select or deselect Do not encode if text is 7-bit as required.**
   b. **In Default decode character set, select a character set that should be used for decoding when one is not specified by the MIME headers.**
   c. **In Maximum number of MIME parts, specify the maximum number of MIME parts that can be contained in a MIME message. Default value is 10000 MIME parts.**

   d. In Header corruption in a MIME message, select the required option.
   e. In NULL characters in the headers of a MIME message, select the required option.
   f. In Quoted-printable characters encoding in a MIME message, select the required option.
8. In MIME Types tab, specify which MIME types should be treated as text attachments and which, as binary attachments.

   Note

   Click **Add** to add the MIME types to the list or **Delete** to delete a MIME type from a list. Duplicate entries are not allowed.

9. In Character Sets tab, select Character set and Alternatives, deselect the Fixed checkbox, and click Add to specify an alternative character set mapping to the one specified in the MIME message.

   Note

   Click **Edit** to edit character mappings, **Delete** to delete character mappings and click **Save** to apply any changes you have made to the character mappings.
   The **Save** option is available only when you click **Edit**.

10. Click Save.
11. In Alert selection, you can select which alert to use when a MIME type is blocked. You can use:
    - **Create** — To create a new alert message for this policy.
    - **View/Hide** — To display or hide the alert text. If the text is hidden, clicking this link displays it. If the text is displayed, clicking this link hides it.
12. In Incomplete message actions, click Edit to specify the filter actions that must be taken when a partial MIME or external MIME type is encountered.
13. Click Save to return to the policy page.
14. Click Apply to configure these settings to a policy.

Configure HTML file settings

Configure settings in a policy to scan for elements or remove executables such as ActiveX, Java applets, VBScripts in HTML components in an email.

If any of this content is found in HTML, it is removed. This filter works only if Content Scanner is enabled.

Task

1. From Policy Manager, select a submenu item that has the filter.
   The policy page for the submenu item appears.
2. Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.
3. Click HTML Files.
4. In Options, click <create new set of options>.
   The **HTML Files** page appears.
5. In Instance name, type a unique name for the filter setting instance. This field is mandatory.

6. **In Scan the following elements, select any of these option(s):**
   - **Comments** — To scan for comment elements in the HTML message. For example:

     ```
     <!-- comment text --!>
     ```

   - **Metadata** — To scan for metadata elements in the HTML message. For example:

     ```
     < META EQUI="Expires" Content="Tue, 04 January 2013 21:29:02">
     ```

   - **Links URLs ("<ahref=...")** — To scan for URL elements in the HTML message. For example:

     ```
     <a HREF="Trellix.htm">
     ```

   - **Source URLS ("<img src=...")** — To scan for source URL elements in the HTML message. For example:

     ```
     <IMG SRC="..\..\images\icons\trellix_logo_rotating75.gif">
     ```

   - **JavaScript / VBScript** — To scan for JavaScript or Visual Basic script in the HTML message. For example:

     ```
     <script language="javascript" scr="mfe/mfe.js">
     ```

7. **In Remove the following executable elements, select any of these option(s):**
   - **JavaScript / VBScript** — To remove JavaScript or Visual Basic script elements from the HTML message. For example:

     ```
     <script language="javascript" scr="mfe/mfe.js">
     ```

   - **Java applets** — To remove Java applet elements from the HTML message. For example:

     ```
     <APPLET code="XYZApp.class" codebase="HTML .....")></APPLET>
     ```

   - **ActiveX controls** — To remove ActiveX control elements from the HTML message. For example:

     ```
     <OBJECT ID="clock" data="http://www.trellix.com/vscan.png" type="image/png"> VirusScan Image </
     OBJECT>
     ```

   - **Macromedia Flash** — To remove Macromedia Flash elements from the HTML message. This option gets enabled if you have selected ActiveX controls. For example:

     ```
     <EMBED SCR="somefilename.swf" width="500" height="200">
     ```

8. **Click Save to return to the policy page.**
9. **Click Apply to configure these settings to a policy.**

Manage miscellaneous settings for a policy

Create or edit miscellaneous settings such as alerts and disclaimers, that are applied when a policy is triggered.

The available options are:

- **Alert Settings**
- **Disclaimer Text**

Configuring alert message settings

Configure settings in a policy to notify the end user with an alert message, when a detection occurs.

Task

1. **From Policy Manager, select a submenu item that has the scanner.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Alert Settings.**
4. **Select Enable to activate the alert message settings for the selected submenu item.**

   Note

   - If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
   - If you add a new alert message setting to the policy, you can specify a time slot when to enable, using **What time would you like this to apply** drop-down list.

5. **In Options, select the default alert settings available or select <create new set of options> to define your alert settings.**

   Note

   For step-by-step instructions on how to create a new alert, see the *Create a new alert* section.

6. **Click Edit to modify an existing alert.**
   The **Alert Settings** page appears.
7. **Select HTML or Plain text as the Alert format.**
8. **From the Character encoding drop-down menu, select a required character set.**
9. **In Alert filename, specify the file name for this alert, including the appropriate HTML (.htm) or plain text (.txt) file extension.**
10. **Select or deselect Enable alert headers to enable the use of an alert header.**
11. **In the Alert header text entry box, type the header for the alert.**
12. **From Show, select HTML content (WYSIWYG) or HTML content (source) depending on whether the HTML text should be shown as compiled code or source code in the Alert header.**

Note

The **Show** option is only available if you have selected **HTML** as the alert message format.

13. **Select Enable alert footers to enable the use of an alert footer as needed.**
14. **In the Alert footer text entry box, type the footer for the alert.**
15. **From Show, select HTML content (WYSIWYG) or HTML content (source) depending on whether the HTML text should be shown as compiled code or source code in the Alert footer.**

Note

The **Show** option is only available if you have selected **HTML** as the alert message format.

16. **Click Save to return to the policy page.**
17. **Click Apply to configure these settings to a policy.**

Configuring disclaimer text settings

Configure disclaimer text settings in a policy which is a piece of text, typically a legal statement that is added to all outbound email messages.

When assigned to a policy, all emails leaving the exchange organization through the TSME server will have the disclaimer text applied, based on the settings configured.

Note

Disclaimer text settings are applicable only on Microsoft Exchange Transport servers.

Task

1. **From Policy Manager, select a submenu item that has the scanner.**
   The policy page for the submenu item appears.
2. **Click Primary policy or any subpolicy you want to configure, then click List All Scanners tab.**
3. **Click Disclaimer Text.**
4. **Select Enable to activate the disclaimer text settings for the selected submenu item.**

Note

- If you are configuring settings for a subpolicy, select **Use configuration from parent policy** to inherit settings from the parent policy.
- If you add a new disclaimer text setting to the policy, you can specify a time slot when to enable, using **What time would you like this to apply** drop-down list.

5. **In Options, select <create new set of options>. The Disclaimer Text page appears.**

6. **In Instance name, type a unique name for the disclaimer text setting instance. This field is mandatory.**
7. **From Disclaimer format, you can select:**
    - **HTML** — To specify whether you want the disclaimer to appear in HTML format in the notification email.
    - **Plain text** — To specify whether you want the disclaimer to appear in plain text format in the notification email.
8. **In Edit Disclaimer content, type the disclaimer text message.**
9. **From Show, select HTML content (WYSIWYG) or HTML content (source) depending on whether the HTML text should be shown as compiled code or source code in the Alert footer.**

Note

The **Show** option is only available if you have selected **HTML** as the disclaimer text format.

10. **From the Insert disclaimer drop-down list, select Before any message text, After any message text or As an attachment depending on where and how the disclaimer text should be inserted in the email message.**
11. **Click Save to return to the policy page.**

Note

Disclaimers are applicable only to outbound email messages.

12. **Click Apply to configure these settings to a policy.**

Settings and diagnostics

Settings & Diagnostics has menus for **TSME** feature enablement and disablement, feature configuration, feature administration and logs. Configure these settings based on your organization's security policies.

To modify or view **TSME** product settings, from the product's user interface, click **Settings & Diagnostics**. This table briefly explains when to configure these settings:

Settings & Diagnostics

Use...	To...
On-Access Settings **Note:** As Microsoft VSAPI support is removed from Microsoft Exchange 2013, 2016, and 2019, the On-Access VSAPI and Background scan settings feature is disabled on Exchange 2013, 2016, and 2019 server.	Define what to do with an email should a scan fail. The options are: • **Allow Through** • **Remove** • **Re-Submit** It also has submenus for enabling or disabling settings for: • **Transport Scan Settings**
On-Demand Settings	Modify the password credential for the **MSMEODUser** and to synchronize the password update with the Active Directory and other exchange servers.
Notifications	• Define an administrator email account to receive notifications or send notification emails to specific reviewers or DLs, when an email is detected. • Create customized notification emails that go out to users when an email is quarantined. • Define product health alerts that are emailed to the administrator on a daily basis or immediately when specific events occur, such as issues with the Postgres database or loading a service fails.
TIE Settings	Configure and manage TIE detection settings using: • **File types for TIE Reputation** — To filter file types for **TIE** Reputation check.

Use...	To...
	• **Take action at and below** — To enable action when the reputation score is less than or equal to the defined threshold. • **Take the following action** ▫ **Replace item with an alert** ▫ **Delete embedded item** ▫ **Delete message** ▫ **And also** — Provides various options such as log, quarantine, or notify. • **Submit files to ATD at and below** and **Limit files to** — To send files to Advanced Threat Defense reputation check with the **TIE** reputation threshold and the file size limit match.
Detected Items	Configure and manage quarantine repositories, using either: • **Local Database** — To manage and administer the local quarantine database activities such as purge and optimization.
User Interface Preferences	Define settings in the **Dashboard** such as the refresh rate, report settings, unit scale of graphics, reporting interval, graph and chart settings.
Diagnostics	Define settings for debug event and product logs, including information on how large the logs are and where they are stored. Diagnostics settings include: • **Debug Logging** • **Event Logging** • **Product Log** • **Error Reporting Service**
Product Log	View the **Product Log** and filter the output by date, type or description.

Use...	To...
DAT Settings	Keep older DATs instead of over-writing with each update and define how many detection definition files to maintain.
Import and Export Configuration	Set up your current **TSME** server with the same configurations as one already built, restore default or enhanced settings, or create SiteLists to point to DAT download sites.
Proxy Settings	Configure or modify proxy settings.

Note

If you modify any of these settings, make sure you click **Apply** to save the changes. The background color behind **Apply**, changes to:

- Yellow — If you have changed the existing setting or the change is still not applied.
- Green — If you have not changed the existing setting or the change is applied.

On-Access settings

On-access scanning is triggered at the Gateway or every time email messages are accessed, to determine if an item is detected by the on-access policy. On-access scanning is also known as real-time scanning.

Each scan has its own benefit based on the Exchange server role where **TSME** is installed. This table helps you understand the types of scan, its function, and when each scan is applicable:

Exchange Server role	Applicable policies	Scan type	Description
Edge Transport	• On-Access • Gateway	On-Access Transport scan	Scans for threats before it reaches the Mailbox server. By enabling this, **TSME** can detect threats at the perimeter of your organization and thus reduce the load on the Mailbox server.

Exchange Server role	Applicable policies	Scan type	Description
Mailbox	• On-Access	Proactive scan	Scans for threats before an email is written to the Microsoft Exchange Information Store.
		Outbox scan	Scans for threats in an email that is in the Outbox folder.

From the **General** section, define an action to take when a scan failure occurs.

A scan failure can occur for any of these reasons:

- **On Generic failure** — Scanner is not able to scan a particular file.
- **On Product failure** — Scanning fails due to incorrect DAT or engine.

Some of the reasons might be due to technical issues such as:

- Scan timeout
- Scan Engine failed to load
- DAT issues
- Incorrectly formatted emails

For example, if there is a DAT mismatch in the registry and actual location (**\bin\DATs**), a scan failure will occur.

If there is a scan failure, an action will be triggered based on the settings specified under **Settings & Diagnostics** → **On-Access Settings** → **General**.

Option definitions

Option	Definition
On Generic Scan Failure	• **Allow Through** — Allows the email message to the intended recipient, when a scan failure occurs. • **Remove** — Removes the email message, when a scan failure occurs. • **Re-Submit** — Allows rescanning of fIles when scan failure occurs.
On Product Scan Failure	• **Allow Through** — Allows the email message to the intended recipient, when a scan failure occurs.

Option	Definition
	• **Remove** — Removes the email message, when a scan failure occurs. • **Re-Submit** — Allows rescanning of files, when scan failure occurs.
Note: Trellix recommends that you always set this option to **Allow Through** to avoid legitimate emails being quarantined should a scan failure occur. By default, this option is set to **Allow Through**, so that emails are not lost during a scan failure.	

The other categories in the **On-Access Settings** page are:

- **Transport Scan Settings**

In Transport Scan Settings, you can exclude emails with the defined size for scanning. When enabled, the default file size to exclude is 4 MB.

Note

For more information on the types of scan, see **Trellix** KnowledgeBase article KB51129.

Transport scan settings

Transport scanning allows you to scan SMTP traffic before it enters the Exchange information store. SMTP Transport scanning can perform scanning of routed email messages that are not destined for the local server and can stop delivery of messages.

Option definitions

Option	Definition
Enable	Select to enable scanning at the Exchange Transport level. By default, this option is enabled. **Note:** This option will work only on Microsoft Exchange servers with Edge Transport.
Transport Scan Stamp	Select to apply DAT signatures to the email header, so that the emails are not scanned again at the Mailbox role.

Option	Definition
	Recommended settings: If you have enabled Transport scan, make sure to enable this option as well.
Avoid scan of emails with size greater than	Exclude emails from on-access scanning based on the size of an email. You can define the file size in KBs or MBs. **Note: Trellix** recommends that you scan all files before accessing it to prevent your systems from any potential threats.
Direction Based Scanning	Configure on-access scan settings based on the email flow.
Scan Inbound Mails	Select to scan any email message that comes into the Exchange server or Exchange organization.
Scan Outbound Mails	Select to scan any email message that leaves your Exchange server or Exchange organization. Email messages are designated as outbound, if at least one recipient has an external email address.
Scan Internal Mails	Select to scan email messages that are being routed from one location inside your domain to another location inside your domain. Anything within the Exchange server's Authoritative Domain is considered as an internal domain. Email messages are designated as internal if they originate from inside your domain and all the recipients are located inside your domain.

On-Demand settings

Access the **On-Demand Settings** page to modify the **MSMEODUser** password credentials.

Trellix Security for Microsoft Exchange creates a user **MSMEODUser** in the Active Directory during the product installation on the mailbox server. This user is required to perform on-demand scanning on mailboxes.

To comply with your organization security policy, you might require to update the **MSMEODUser** password at regular intervals.

From the interface, navigate to **Settings & Diagnostics** | **On-Demand Settings**.

Option	Definition
User Name	**MSMEODUser** — The user that performs on-demand scanning. **Note:** This is a read-only field.
Type password	Type the password.
Confirm password	Confirm the password.
Reset this password in LDAP also	Select this option to synchronize the password update with the Active Directory and other exchange servers. **Note:** Check this option only when you initiate the password reset from the **On-Demand settings** page.

You can update the **MSMEODUser** password in two ways:

- Reset the password in the Active Directory, then update the password in the **On-Demand Settings** page.
- Reset the password from the **On-Demand Settings** page.

Reset the password using Active Directory	Reset the password using On-Demand Settings page
• Update the password in the Active Directory. • Go to any of the mailbox role system within the same Active Directory. • Launch the **Trellix Security for Microsoft Exchange** interface. • From **Settings & Diagnostics**, navigate to the **On-Demand settings** page, then update the password.	1. Launch the **Trellix Security for Microsoft Exchange** interface. 2. From **Settings & Diagnostics**, navigate to the **On-Demand settings** page, then update the password. 3. Check the **Reset the password in LDAP also** option to make sure that the password update is synchronized with the Active Directory.

Reset the password using Active Directory	Reset the password using On-Demand Settings page
• Deselect the **Reset the password in LDAP also** option. • Click **Apply**.	4. Click **Apply**.

Note

For managed systems, you can update the **MSMEODUser** password from **ePolicy Orchestrator - On-prem**.

Note

It might take up to a minute to apply this setting in all exchange servers within the domain. Please run an on-demand scan after updating the password for verification.

For more information about the **MSMEODUser**, see **Trellix** KnowledgeBase article KB82332.

Notification settings

Allows you to configure the content and SMTP address for the administrator to send email notifications, when an email is quarantined.

From the product's user interface, click **Settings & Diagnostics** → **Notifications** to configure notification settings.

In the **Notifications** page, you can use:

- **Settings** — To define an email account to receive notifications, when an email is quarantined. Additionally, you can send notification emails to specific reviewers or DLs, when an email is quarantined due to a specific scanner or filter.

  Note

  Make sure that email addresses are updated as required for systems or group systems in the **Notification** page to receive notifications for managed and standalone systems.

  Note

  To send email notifications to a distribution list (DL), specify the SMTP address of the DL.

- **Template** — To create customized notification email that goes out to specific users, when an email is quarantined.
- **Product Health Alerts** — To define product health alerts that are emailed to the administrator on a daily-basis or immediately when specific events occur, such as issues with the Postgres database or loading a service fails.

Note

When configuring the product, such as notification or policy name, make sure that you do not use characters that can cause Cross Site Scripting (XSS) vulnerability. For the list of characters that you must avoid, see **Trellix** KnowledgeBase article KB82214.

Configure notification settings

Configure an email account to receive notifications, when an email is quarantined. Also send notification emails to specific reviewers or DLs, when an email is detected.

Task

1. **From the product's user interface, click Settings & Diagnostics → Notifications.**
2. **In the Notifications → Settings tab, you can use:**

Option definitions

Option	Definition
General	To define simple email notification settings.
Administrator E-mail	To notify the Microsoft Exchange administrator in case of an event such as quarantine action or alert. **Note:** • To send email notifications to multiple users, use semi-colon (;) as the delimiter. • To send email notifications to a distribution list (DL), specify the SMTP address of the DL.
Sender E-mail	To specify the sender's email address in the **From** field of the notification email. **Important: Trellix** recommends that you do not modify the **Sender E-mail** address because the software creates and uses this address for multiple purposes. If you change this email address and do not enable **Anonymous** receive connector in Microsoft Exchange, you don't receive product notifications.

Option	Definition
Enable Task results notification	To send emails with on-demand scan and update tasks results. The email is in HTML format and has the same data and format as **Task Result** window in the user interface. This feature can be enabled/disabled through this option. By default, this feature is disabled.
Advanced	To define advanced notification settings such as specifying individual email addresses and subject line for each scanner or filter.
Mail Body	To define a generic email message body for all notifications.

3. **Click Apply to save the settings.**

ⓘ **Important**

TSME provides enhanced security by not supporting the HTML tags that have XSS vulnerability. **Trellix** recommends that you remove the HTML tags that have XSS vulnerability from the existing notification template before the upgrade. Otherwise, after the upgrade, if you try to modify the notification templates that contain unsupported tags, you will be prompted to remove the unsupported tags from the template or use the template without modification. For the list of unsupported HTML tags, see **Trellix** KnowledgeBase article KB82214.

Edit notification template

View or edit the message body of the notification email sent to end-user.

Task

1. **From the product's user interface, click Settings & Diagnostics → Notifications.**
2. **In the Notifications → Template tab, you can use:**

Option definitions

Option	Definition
Template	To view the notification template for a specific end-user. The available options are: • **Internal Sender** • **Internal Recipient**

Option	Definition
	• **External Sender** • **External Recipient** You can define specific notification text for each of these user types.
Subject	To specify the subject line for the notification email. By default the notification subject is **Trellix Security for Microsoft Exchange Alert**.
Notification Text	To preview of the notification email's message body, based on the selected **Template**. The notification text contains information about the quarantined item, such as the date and time, subject, action taken and so on.
Edit	To modify the notification text using HTML in plain text format. After editing the notification based on your company's requirement, click **Save** to apply the changes.

3. **Click Apply to save the settings.**

Results

You have now successfully viewed or modified the notification template. For more information on the available notification fields, refer to the *Notification fields that you can use* section.

Notification fields that you can use

Use these fields to include them in your notifications. For example, if you want the name of the detected item and the action taken when it was detected, use **%vrs%** and **%act%** in the **Settings & Diagnostics** → **Notifications** → **Template** page.

Notification fields you can use

Notification field options	Description
%dts%	Date and time
%sdr%	Sender

Notification field options	Description
%ftr%	Filter
%fln%	File name
%rul%	Rule name
%act%	Action taken
%fdr%	Folder
%vrs%	Detection name
%trs%	State (Train state)
%tik%	Ticket number
%idy%	Scanned by
%psn%	Policy name
%svr%	Server
%avd%	Anti-virus DAT
%ave%	Anti-virus engine
%rpt%	Recipient
%rsn%	Reason
%sbj%	Subject

Enable product health alerts

Send notifications immediately or on a daily-basis to the Microsoft Exchange administrator, when a product specific task fails.

Task

1. From the product's user interface, click Settings & Diagnostics → Notifications.
2. In the Notifications → Product Health Alerts tab, you can use:

Option definitions

Option	Definition
Enable	To enable sending product health alert notifications to the administrator, when a product specific task fails.
Alert ePolicy Orchestrator	To alert the Trellix ePolicy Orchestrator server that manages this TSME server, when a product specific task fails.
Alert Administrator	To send the product health alerts to the email address specified under **Settings & Diagnostics → Notifications → Settings → Administrator E-mail**.
Notify when	To notify the administrator when any of the selected product specific task fails. You can select these options to send product health alerts to the administrator: **Note:** These options may vary based on your Exchange server role. • Downloading DATs/Anti-Virus Engine fails • Loading Anti-Virus Engine fails • Loading TransportScan module fails • RPCServ process quits unexpectedly • DLLHost process quits unexpectedly • Postgres process fails • Postgres failed to quarantine or log detections • Postgres database initialization fails • Postgres failed to store a record • On-Demand scan fails • Database diskspace goes below the threshold • Product service fails to start

Option	Definition
	• **Trellix Global Threat Intelligence file reputation scanning fails**
Immediate	To send a notification to the administrator immediately after the task fails.
Daily	To send a notification to the administrator on a daily-basis at a specific time when the task fails.

3. **Click Apply to save the settings.**

Results

You have now successfully enabled the **Product Health Alerts** feature.

Gateway Settings

Enable or disable settings for the **Trellix GTI** IP reputation feature and SPF filter.

Option definitions

Option	Definition
McAfee GTI IP reputation	IP reputation acts as the first level of protection for your Exchange environment, by safeguarding your Exchange server from unsafe email sources. It enables you to leverage the threat intelligence gathered by **Trellix Global Threat Intelligence** to prevent damage and data theft by blocking the email messages at the gateway, based on the source IP address.
Enable	To block email messages at the gateway, based on the source IP address.
IP reputation threshold	Specify a threshold value to block email messages based on the IP reputation score.

Option	Definition
	Note: The action will be applied to all IP addresses having a reputation score greater than the selected threshold. All other email messages will be allowed through. You can allow the legitimate IP addresses that are blocked by the **IP reputation threshold** settings in the **Gateway Settings** page by modifying the registry values. After allowing the IP address, emails from the allowed IP address are passed through, regardless of its reputation score. **Important**: IP address allowing overrides only the **IP reputation threshold** settings. **TSME** further scans the email for corrupt or encrypted content, file filter, content scanning, URL reputation, and anti-malware. If there is a detection, action is taken according to the product configuration. Before allowing the IP address, **Trellix** recommends that you verify the reputation score of the IP address from www.trustedsource.org for its legitimacy. **Trellix** cannot be held liable, if you have any mailboxes that are infected by the allowed IP address. For more information about configuring IP allowing for IP Agent using the registry, see **Trellix** KnowledgeBase article KB82216.
Action to take	Select either of these options to take an action on an email message, based on the reputation score of the source IP address: • **Drop connection and Log** — To drop the email from the detected source IP address and log the action taken on the item. • **Reject connection and Log** — To reject the email from the source IP, by notifying the sender and log the action taken on the item.

Option	Definition
IP Blocking or Allowing	You can block or allow legitimate addresses based on the IP addresses added in the blocked or allowed list.
Enable IP Blocking	You can select the IPs to block at the gateway.
Enable the IPs to Block	Blocks the selected IPs.
Enable IP Allowing	You can select the IPs to allow at the gateway.
Enable the IPs to Allow	Allows the selected IPs.
SPF Filter	Protects your systems from spoofing emails, and you can configure actions on Hard Fail and Soft Fail messages.

Detected items settings

Specify repository settings to store the quarantined items detected by TSME.

Configure and manage quarantine repositories using:

- **Local Database** — To quarantine detected items in the local TSME server.

Quarantine using the local database

Specify repository settings to quarantine items detected by TSME to a PostgreSQL database on the local TSME server.

Task

1. **From the product's user interface, click Settings & Diagnostics → Detected Items.**
   The **Detected Items** page appears.
2. **From the Local Database section, you can use:**

   Option definitions

Option	Definition
Specify location of database	To enable the **Database location** for storing the quarantined items detected by TSME.

Option	Definition
Database location	To specify the database location path where items detected by TSME can be stored. You can select: • **<Install Folder>** — To create the database sub-folders under the TSME installation directory. • **<System Drive>** — To create the database sub-folders under the **C:\Windows\system32** directory. • **<Program Files>** — To create the database sub-folders under the Windows **C:\Program Files (x86)** directory. • **<Windows Folder>** — To create the database sub-folders under the **C:\Windows** directory. • **<Data Folder>** — To create the database sub-folders under the **C:\ProgramData\** directory. • **<Full Path>** — To store the TSME database in the complete path specified. **Note:** Specify the sub-folder path in the field next to the drop-down list. The default sub-folder path specified is: **McAfee\MSME\Data\**
Maximum item size (MB)	To specify the maximum size of a quarantined item that can be stored in the database. You can specify a value from 1 to 999, where the default value is 100.
Maximum query size (records)	To specify the maximum number of records or quarantined items you can query from the **Detected Items** page. You can specify a value from 1 to 20000, where the default value is 1000.
Maximum item age (days)	To specify the maximum number of days an item will be stored in the local quarantine database, before being marked for deletion. You can specify a value from 1 to 365, where the default value is 30.

Option	Definition
Disk size check interval (Minute)	To specify how often TSME should check for the available disk space. You can specify a value from 6 to 2880, where the default value is 6.
Disk space threshold (MB)	To specify the threshold value at which a low disk space warning notification should be sent to the administrator. You can specify a value from 1 to 512000, where the default value is 2048. **Note:** Make sure that **Database diskspace goes below the threshold** under **Settings & Diagnostics** → **Notifications** → **Product Health Alerts** → **Notify when** is enabled.
Purge of old items frequency	To specify how frequently old items that are marked for deletion are deleted from the TSME database. The default value is set to **Monthly**.
Optimization frequency	To recover the disk space taken up by deleted database records. Based on the value set under **Maximum item age (days)**, old records will be deleted if you have scheduled a purge task. After deleting these old records, TSME will still use the disk space specified under **Disk space threshold (MB)** field, even if the quarantine database has not reached the size limit. To optimize and shrink the database, schedule an optimization task. The default value is set to **Monthly**. **Note:** Always schedule an optimization task a few hours after you perform the purge task.
Edit Schedule	To modify the schedule of the purge or optimization task. Click **Save** after modifying the schedule.

3. **Click Apply to save the settings.**

Results

You have now successfully configured your TSME server to start quarantining detected items on to the local database.

User interface preferences settings

Define settings in the **Dashboard** such as the refresh rate, report settings, unit scale of graphics, reporting interval, graph and chart settings.

Configure dashboard settings

Configure settings in the **Dashboard** such as the statistics, unit scale of graph, items to view in the **Recently Scanned Items**, and status reporting interval.

Task

1. **From the product's user interface, click Settings & Diagnostics → User Interface Preferences.**
   The **User Interface Preferences** page appears.
2. **Click Dashboard Settings tab. You can use:**

Option definitions

Option	Definition
Automatic refresh	To specify whether the information shown on the **Dashboard** → **Statistics** counter should be refreshed automatically.
Refresh rate (seconds)	To specify the duration (in seconds) at which the information on the dashboard should be refreshed. You can specify a value from 30 to 3600, where the default value is 60.
Maximum recently scanned items	To specify the maximum number of items to appear in the **Dashboard** → **Reports** → **Recently Scanned Items** section. You can specify a value from 10 to 100, where the default value is 10.
Graph scale (units)	To specify the measurement units for the scale of the bar graph that is generated on the **Dashboard** → **Graph** section. You can specify a value from 100 to 500, where the default value is 100.

Option	Definition
Number of hours to report for	To specify the report generation interval (in hours) to generate reports such as status and configuration reports. You can specify a value from 1 to 24, where the default value is 7.

3. **Click Apply to save the settings.**

Configure graph and chart settings

Configure settings in the **Dashboard** → **Graph** section to enhance the graph and chart settings.

Task

1. **Click Settings & Diagnostics → User Interface Preferences.**
2. **Click Graph and Chart Settings tab. You can use:**

Option definitions

Option	Definition
3D	To specify whether you want the dashboard graph to be displayed as a three-dimensional (3D) graph.
Draw transparent	To specify whether the bars in a three-dimensional bar graph should appear solid or transparent. A solid bar hides part of any bar behind it. A transparent bar allows you to look through it and see other transparent bars behind it.
Anti-alias	To specify whether you want to use anti-aliasing techniques when displaying pie charts. When anti-aliasing is used, pie charts have smoother curves. If anti-aliasing is not used, pie chart curves appear jagged.
Explode pie	To specify whether the segments should remain within the circle of the pie chart or be shown with exploded segments.

Option	Definition
Pie angle (degrees)	To specify the angle to use when displaying pie charts. You can specify a value from 1 to 360, where the default value is 45.

3. **Click Apply to save the settings.**

Diagnostics settings

Determine the causes of symptoms, mitigation for problems and solutions to issues faced while using TSME.

In the **Settings & Diagnostics** → **Diagnostics** page, you can use:

- **Debug Logging** — To configure debug logging settings such as specifying the debug log level, maximum file size limit of the log file, and the file location.
- **Event Logging** — To configure settings to capture product or event related logs based on information, warnings or errors.
- **Product Log** — To configure settings for the TSME product log file (**productlog.bin**). Changes made to this setting will be reflected on the **Settings & Diagnostics** → **Product Log** page.
- **Error Reporting Service** — To configure settings to determine whether to catch exceptions such as system crashes and report to the user.

Configure debug log settings

Configure settings to specify the debug log level, maximum file size limit of the log file, and the log file location. Use these settings when you want to troubleshoot an issue with the product and provide the logs to **Trellix** Technical Support for further analysis.

ⓘ **Important**

Configure **Debug Log** settings for troubleshooting purposes and only for a limited duration. Once you capture sufficient logs for troubleshooting, set the value for **Level** to **None**. Using debug logging indiscriminately could fill up the hard disk space and affect the overall performance of the server. Enable it for a limited duration as advised by an authorized personnel (**Trellix** Technical Support Engineer).

Task

1. **From the product's user interface, click Settings & Diagnostics → Diagnostics.**
   The **Diagnostics** page appears.
2. **In the Debug Logging tab, you can use:**

Option definitions

Option	Definition
Level	To enable or disable debug logging and specify the level of information that should be captured in the debug log file. You can select: • **None** — To disable debug logging. • **Low** — To log critical events such as errors, exceptions, and return values of functions in the debug log file. Select this if you want to keep a low size for the debug log file. • **Medium** — To log events mentioned in the **Low** state and additional information that could be of help to the technical support team. • **High** — To log all critical errors, warnings and debug messages in the debug log file. It contains information about all activities performed by the product. This is the most detailed level of logging supported by the product.
Enable size limit	If you want to specify a maximum file size limit for each debug log file.
Specify maximum file size	To specify how large the debug log files can be. You can specify a value from 1 KB to 2000 MB. **Note:** If the debug log files exceed the specified file size, older events will be rewritten due to circular logging, where new log entries are added to the file by deleting the oldest log entries.
Enable debug logging	If you want to modify the default debug file logging location.

Option	Definition
	Note: If this option is disabled, the debug log files will be stored under **<Install Folder>\bin\debuglogs** default directory.
Specify file location	To specify the debug log file location path where events triggered by TSME can be stored. You can select: • **<Install Folder>** — To create the debug log files under the TSME installation directory. • **<System Drive>** — To create the debug log files under the **C:\Windows\system32** directory. • **<Program Files>** — To create the debug log files under the Windows **C:\Program Files (x86)** directory. • **<Windows Folder>** — To create the debug log files under the **C:\Windows** directory. • **<Data Folder>** — To create the debug log files under the **C:\ProgramData\** directory. • **<Full Path>** — To store the debug log files in the complete path specified in the adjacent textbox. **Note:** To store the debug log files to a custom location or sub-folder, specify the sub-folder name or path in the field next to the drop-down list.

Important

Make sure that the folder that collects the debug logs is provided "Write" permissions for the NETWORK SERVICE account.

3. **Click Apply to save the settings.**

Note

For more information on generating Exchange Web Services (EWS) wrapper log for the on-demand scan task, see **Trellix** KnowledgeBase article KB82215.

Results

You have now successfully configured the debug log settings, that you can use for troubleshooting.

Configure event logging settings

Configure settings to log the types of TSME events in the **Product Log** and Windows Event Viewer.

An event is a possible action that you perform, which is monitored by TSME. **Event Logging** provides information useful for diagnostics and auditing. The different classes of events are:

- Error
- Information
- Warning

This allows system administrators to more easily obtain information on problems that occur.

Task

1. **From the product's user interface, click Settings & Diagnostics → Diagnostics.**
   The **Diagnostics** page appears.
2. **Click Event Logging tab. You can use:**

Option definitions

Option	Definition
Product Log	To log TSME events in the **Product Log**. These events can be viewed from **Settings & Diagnostics** → **Product Log** → **View Results** section.
Event Log	To log TSME events under Windows Event Viewer. To find TSME related events in the Windows Event Viewer: a. Go to **Event Viewer (Local)** → **Windows Logs** → **Application**. b. In the **Application** pane, product related events appear as **MSME** under the **Source** column.
Write information events	To log events that are categorized as **Information**.
Write warning events	To log events that are categorized as **Warning**.

Option	Definition
Write error events	To log events that are categorized as **Error**.

3. **Click Apply to save the settings.**

Configure product log settings

Configure settings for the **Settings & Diagnostics** → **Product Log** page, by specifying the required parameters to generate product logs.

Task

1. **From the product's user interface, click Settings & Diagnostics → Diagnostics.**
   The **Diagnostics** page appears.
2. **Click the Product Log tab. You can use:**

Option definitions

Option	Definition
Location	If you want to configure a location to store the product log. Select **Enable** to specify a custom location.
Specify database location	To specify the product log file location path where product log events can be stored. You can select: • **<Install Folder>** — To create the product log file under the TSME installation directory. • **<System Drive>** — To create the product log file under the **C:\Windows\system32** directory. • **<Program Files>** — To create the product log file under the Windows **C:\Program Files (x86)** directory. • **<Windows Folder>** — To create the product log file under the **C:\Windows** directory. • **<Data Folder>** — To create the product log file under the **C:\ProgramData\** directory. • **<Full Path>** — To store the product log file in the complete path specified in the adjacent textbox.

Option	Definition
	Note: To store the product log file to a custom location or sub-folder, specify the sub-folder name or path in the field next to the drop-down list.
Filename	If you want to specify a different file name to store the product log. Select **Enable** to specify a custom file name.
Specify database filename	To specify a custom file name for the product log. The default file name is **productlog.bin** under **<Install Folder>\Data\** directory. **Note:** If you modify the default product log file name or path, the log entries in the **Settings & Diagnostics** → **Product Log** page will be reset and older log entries will not appear.
Size Limit	If you want to specify a different size limit for the product log file. Select **Enable database size limit** to specify a custom file size.
Specify maximum database size	To specify how large the product log file can be. You can specify a value from 1 KB to 2000 MB. **Note:** If the product log file exceeds the specified file size, older log events will be rewritten due to circular logging, where new log entries are added to the file by deleting the oldest log entries.
Limit age of entries	If you want the product log entries to be deleted after a set period of time.

Option	Definition
Specify maximum age of entry	To specify how many days an entry should remain in the product log file before it is deleted. You can specify a value from 1 to 365.
Query Timeout	If you want to limit the amount of time allowed for answering a product log query. Select **Enable** to specify the duration.
Specify query timeout (seconds)	To specify the maximum number of seconds allowed, when answering a product log query. You can specify a value from 1 to 3600.

3. **Click Apply to save the settings.**

Results

You have now successfully configured settings for the **Product Log** page.

Configure error reporting service settings

Configure settings to report product related errors or exceptions to **Trellix**.

Task

1. **From the product's user interface, click Settings & Diagnostics → Diagnostics.**
   The **Diagnostics** page appears.
2. **Click the Error Reporting Service tab. You can use:**

Option definitions

Option	Definition
Enable	To enable or disable the error reporting service.
Catch exceptions	To capture information about exceptional events, such as system crashes.
Report exceptions to user	To specify whether exceptions should be reported to the administrator.

3. **Click Apply to save the settings.**

View product logs

View the product's health using log entries about events, information, warnings, and errors. For example, you can view information on when a task initiated or ended, product service errors and so on.

You can use the available search filters to find log entries that are of interest to you.

Note

To modify settings related to the product log query page, go to **Settings & Diagnostics** → **Diagnostics** → **Product Log**.

Task

1. **From the product's user interface, click Settings & Diagnostics → Product Log. The Product Log page appears.**
2. **From the Product Log section, you can use:**

Option definitions

Option	Definition
ID	To specify the number which identifies a specific product log entry. For example, if you want to view product logs only with ID's greater than 2000, specify: `200*`
Level	To select **Information**, **Warning** or **Error** from the drop-down list, depending on the type of log you want to view.
Description	To specify a relevant description. For example, if you want to view logs based on service start or stop, type: `*service*`
All Dates	To include events from all dates which is based on the entry in the product log file.
Date Range	To search for an event within a defined date range according to your requirements. Here you can specify the date, month, year and time against the parameters **From** and **To**. You can also use the calendar icon to specify a date range.
Clear Filter	To return to the default search settings.

Option	Definition
Export to CSV File	To export and save information about all events returned by the search in a **.CSV** format. If there are thousands of events in the log, instead of navigating through multiple pages, you can use this option to download these events to a file in CSV format and later generate custom reports in Microsoft Excel. **Note:** • If you do not find a specific field in the search result of the CSV file, make sure to enable the required field in the **Columns to Display** option. • Use the Import Data option in Microsoft Excel, to open the CSV file in a different locale.

3. **Click Search.**

Note

The maximum number of records that can be stored in the product log is based on the log file size.

Results

A list of events matching your search criteria are displayed in the **View Results** section.

Configure DAT settings

Specify the number of old DATs that can be maintained in your system.

DAT files are the detection definition files, also referred to as signature files, that identify the code anti-virus and/or anti-spyware software detects to repair viruses, trojan horses and Potentially Unwanted Programs (PUPs).

Task

1. **From the product's user interface, click Settings & Diagnostics → DAT Settings.**
   The **DAT Settings** page appears.
2. **Use Maximum number of old DATs to specify the maximum number of DAT generations that shall be preserved in the system during regular updates. TSME retains the latest DATs with old DATs under <Install Folder>\bin\DATs directory.**

Whenever a new DAT update occurs, TSME verifies the number of available DATs. If the available DATs count exceeds the DAT retention value, the oldest DAT will be deleted. You can specify a value from 3 to 10, where the default value is 10.

3. **Click Apply to save the settings.**

Import and export configuration settings

Configure settings to export existing **TSME** configuration (settings and policies) for import and use on another **TSME** server. Also import sitelists to specify the location from where automatic updates are downloaded.

From the product's user interface, click **Settings & Diagnostics** → **Import and Export Configuration**. In the **Import and Export Configurations** page, you can use these tabs:

- **Configuration** — To export, import or restore product settings.

Configuration tab — Option definitions

Option	Definition
Export	To copy the **TSME** configuration (settings and policies) of this server and save it to a location from where it can be imported by other **TSME** servers. The default **TSME** configuration file is **McAfeeConfigXML.cfg**.
Restore Default	To reset the **TSME** settings for your product to maximum performance.
Restore Enhanced	To reset the **TSME** settings for your product to maximum protection.
Browse	To locate the configuration file (**McAfeeConfigXML.cfg**)that you want to import.
Import	To apply the settings of another **TSME** server to this server. For example, to install **TSME** 8.8 on 5 systems: ▫ Install **TSME** on system 1. ▫ Configure the settings as required. ▫ Export the configuration to cfg file. For more information on importing the configuration, see step 10 in *Install the software using wizard*.

Option	Definition
	Note: You must import settings across the same product version. For example, you must not import settings from an **TSME** 7.6 or 8.0 server to **TSME** 8.8 server.

- **SiteList** — To import sitelists that specify the location from where automatic updates are downloaded.

SiteList tab — Option definitions

Option	Definition
Browse	To locate the sitelist file (**SiteList.xml**) that you want to use.
Import	To apply the sitelist configuration settings specified in the file, to download DAT updates.

Export your existing TSME configuration

Export the configuration of a TSME server and save it to a location, where it can be imported by other TSME servers.

Task

1. **From the product's user interface, click Settings & Diagnostics → Import and Export Configuration.**
   The **Import and Export Configurations** page appears.
2. **Click the Configuration tab.**
3. **Click Export.**
4. **Specify a location where to save the configuration file. The default name of the configuration file is McAfeeConfigXML.cfg.**
5. **Click Save.**

Results

You have now successfully exported your existing TSME settings and policies to a configuration file, that can be imported by other TSME servers.

Import configuration from another TSME server

Apply **TSME** configuration settings from another server to this **TSME** server.

You can import the configuration in two ways:

- Import the configuration while installing the software.
- Import the configuration file after installing the software using the **Import and Export Configuration** option from the **Settings & Diagnostics** page.

Note

- You must import settings across the same product version. For example, you must not import settings from an **TSME** 8.6 or 8.7 server to **TSME** 8.8 server.
- It is advisable that you import settings from **TSME** server's having the same Exchange roles.

Task

1. **From the product's user interface, click Settings & Diagnostics → Import and Export Configuration.**
   The **Import and Export Configurations** page appears.
2. **Click the Configuration tab.**
3. **From the Import Configuration section, click Browse to locate the configuration file. The default name of the configuration file is McAfeeConfigXML.cfg.**
4. **Click Import.**
   A dialog box appears with the message **The operation completed successfully**.
5. **Click OK.**

Results

You have now successfully imported configuration settings from another **TSME** server to this server.

Import a sitelist

Import sitelists that specify the location from where automatic updates are downloaded.

A sitelist specifies from where automatic updates are downloaded. By default, **TSME** uses **SiteList Editor** that points to a **Trellix** URL for automatic updates.

If your **TSME** server is managed by **Trellix ePO - On-prem**, the sitelist from **Trellix ePO - On-prem** is used to perform automatic updates. If you are not using **ePolicy Orchestrator - On-prem** to manage your **TSME** server, create a sitelist that points your **TSME** server to a local repository.

Alternative sitelists can be created using the **Trellix** AutoUpdate Architect software or **Trellix ePO - On-prem**.

Task

1. **Click Settings & Diagnostics → Import and Export Configuration. The Import and Export Configurations page appears.**
2. **Click the SiteList tab.**
3. **From the Import SiteList section, click Browse to locate the sitelist file SiteList.xml. This file contains information about the repository settings such as repository name, server URL, and so on.**

Note

You can find the **SiteList.xml** file under **C:\ProgramData\McAfee\Common FrameWork** directory. The **SiteList Editor** application under **Start** → **All Programs** → **McAfee** uses this file to display the repository settings in the application.

4. **Click Import.**
   A dialog box appears with the message **The operation completed successfully**.
5. **Click OK.**

Results

You have now successfully imported the sitelist that points to a new repository location, to download product updates.

Configure proxy settings

Configure these settings if your organization uses a proxy server to connect to the Internet.

The software can also use this proxy to get the IP reputation and download the local URL database from the GTI server.

Task

1. **From the product's user interface, click Settings & Diagnostics → Proxy Settings.**
   The **Proxy Settings** page appears.
2. **Select Use Proxy. In the Proxy Server Details section, you can use:**

Option definitions

Option	Definition
IP Address	To specify the IP address of the proxy server.
Port	To specify the port used for communications to access the Internet.
Authentication Details	To specify the authentication type. You can use: • **Anonymous** — To access the proxy computer without specifying any authentication details. • **NTLM** — To access the proxy computer using NT LAN Manager credentials. • **Basic authentication** — To provide a system **User Name** and **Password** to access the proxy computer. Retype the password in **Confirm Password**.

3. **Click Apply to save the settings.**

Program maintenance

Perform product maintenance tasks such as modify installation, repair, uninstall, restore default settings, purge and optimize the database.

Modify the installation

Change TSME program features as required and change the way program features are installed on your computer or if you have modified the Exchange server role.

Note

You can also modify the TSME installation from **Control Panel** → **Programs and Features** → **Uninstall a program** console by clicking **Uninstall/Change**.

Task

1. **In the folder containing the installation files, double-click setup_x64.exe.**
2. **Click Next in the Welcome screen.**

   The **Program Maintenance** screen appears.
3. **Select Modify, then click Next.**
4. **Select the program features you want to modify and click Next.**
5. **Select I accept the terms in the license agreement, then click Next.**
6. **Click Install to complete the installation with the modified program features.**
7. **Click Finish when the installation completes.**

Restore default settings

Restore the product to its default configuration and achieve maximum performance.

Task

1. **From the product's user interface, click Settings & Diagnostics → Import and Export Configuration. The Import and Export Configurations page appears.**
2. **From the Configuration tab, click Restore Default.**

   Note

   Restoring the default settings removes all policy settings and subpolicies configured. It is recommended that you take a backup of existing settings, to restore the settings later.

   A dialog box appears asking you to confirm the settings.
3. **Click OK.**

   A dialog box appears confirming that the default configuration settings are applied.

4. **Click OK.**

Results

You have now successfully restored your TSME server to default configuration settings for maximum performance.

Purge and optimize

Remove old items marked for deletion from the database and use optimization task to recover disk space being taken up by deleted database records.

Task

1. **From the product's user interface, click Settings & Diagnostics → Detected Items.**
   The **Detected Items** page appears.
2. **From the Local Database section, you can use:**
   - **Purge of old items frequency** — To specify how frequently old items that are marked for deletion are deleted from the TSME database. The default value is set to **Monthly**.
   - **Optimization frequency** — To recover the disk space taken up by deleted database records. Based on the value set under **Maximum item age (days)**, old records will be deleted if you have scheduled a purge task. After deleting these old records, TSME will still use the disk space specified under **Disk space threshold (MB)** field, even if the quarantine database has not reached the size limit. To optimize and shrink the database, schedule an optimization task. The default value is set to **Monthly**.

     Note

     Always schedule an optimization task a few hours after you perform the purge task.
3. **Click Edit Schedule to modify the schedule.**

   Note

   These tasks should be performed on a regular basis to maintain adequate free space in the database.

Integrating TSME with Trellix ePO - On-prem

Integrate and manage **TSME** using **Trellix ePO - On-prem** management software.

Trellix ePO - On-prem 5.9.x and 5.10.x provides a scalable platform for centralized policy management and enforcement on your **Trellix** security products and systems on which they reside. It also provides comprehensive reporting and product deployment capabilities, all through a single point of control.

For instructions about setting up and using **Trellix ePO - On-prem**, see the product guide for your version of the product.

Manage policies

TSME policies provide options to configure **TSME** feature enablement and disablement, feature configuration, feature administration, and logs.

These policy settings are nearly identical to those you can access from the **Settings & Diagnostic** tab in the **TSME** interface.

You can find these policies on the **Policy Catalog** page under the **Trellix Security for Microsoft Exchange 8.8.1** product.

- **DAT Settings**
- **Detected Items**
- **Diagnostics**
- **Mail Notifications**
- **On Access Settings**
- **Proxy Settings**
- **Scanner Settings**
- **TIE Settings**

Modify these policies with your preferences, then assign them to groups of managed Microsoft Exchange systems or to a single system (requires **Trellix Agent** on the systems). For generic information about policies, see the product guide for your version of the **ePolicy Orchestrator - On-prem** software.

Create or modify policies

Create or modify **TSME** policies from the **Policy Catalog**.

Alternatively, you can create or modify these policies from the **System Tree**, while assigning policies to selected systems. See the product guide for your version of the **Trellix ePO - On-prem** software for more information.

Task

1. **Log on to the Trellix ePO - On-prem server as an administrator.**
2. **From the Policy Catalog, select Trellix Security for Microsoft Exchange 8.8.1 as the product, then select the required policy as the category.**
3. **Perform this step as required:**

To create a policy	To modify a policy
Click **New Policy**, type a name for the policy, then click **OK**.	Click the policy that you want to modify.

4. **Modify the policy settings as required, then click Save.**
   The policy settings are updated and the new policy (when created) appears in the **Policy Catalog**.

Assign policies

When you've created or modified **TSME** policies with the required settings, assign each of them to the required Microsoft Exchange systems that are managed by **Trellix ePO - On-prem**.

Task

1. **Log on to the Trellix ePO - On-prem server as an administrator.**
2. **Navigate to the System Tree, select a required group or systems, then click the Assigned Policies tab.**
3. **Select Trellix Security for Microsoft Exchange 8.8.1 from the products list, locate the required policy, then click Edit Assignment next to the policy.**
4. **(Optional) Select a policy, then click Edit Policy to modify the policy settings. Click New Policy to create a new policy based on the selected category.**

   Note

   Alternatively, you can also modify or create a policy from the **Policy Catalog**.

5. **Select the policy to assign, select appropriate inheritance options, then click Save.**

Results

The policy enforcement occurs in the next agent-server communication. Click **Wake Up Agents** to enforce policies immediately.

Queries and reports

Run the predefined TSME queries to generate your reports, or modify them to generate custom reports.

Predefined queries

These predefined queries are added to the **Trellix Security for Microsoft Exchange Reports** group in **Trellix ePO - On-prem**

Query	Retrieves information on...
MSME 88 : DLP and Compliance History	Historical data for the **DLP and Compliance** threat category of all managed **TSME** servers.
MSME 88 : File Attachments Blocked History	Historical data of managed **TSME** servers with file attachments blocked in email messages.
MSME 88 : File Attachments Blocked Today	The file attachments blocked in email messages as on current date.
MSME 88 : Number of Messages and Average Processing Time Today	The number of email messages scanned on each managed **TSME** server as on current date and their average scan time.
MSME 88 : Percentage of PUPs Detected Today	The percentage of potentially unwanted programs infected email messages detected on each server as on current date.
MSME 88 : Percentage of Virus Detected Today	The percentage of virus infected email messages detected on each server as on current date.
MSME 88 : PUPs Deleted Today	The potentially unwanted programs infected email messages deleted as on current date.
MSME 88 : PUPs Detection History	All potentially unwanted programs infected email messages detected.
MSME 88 : PUPs Detection Today	The potentially unwanted programs infected email messages detected as on current date.
MSME 88 : Top 10 Attachment Types	The top 10 attachment types by their number of detections, which have triggered any rules.
MSME 88 : Top 10 Detected Viruses	The top 10 viruses by their number of detections.
MSME 88 : Top 10 Infected Exchange Servers	The top 10 Microsoft Exchange servers by number of infected email messages detected.

Query	Retrieves information on...
MSME 88 : Top 10 Unwanted Programs	The top 10 potentially unwanted programs by their number of detections.
MSME 88 : Top 10 Virus Recipients	The top 10 email addresses that received the maximum number of virus infected email messages.
MSME 88 : Top 10 Virus Senders	The top 10 email addresses that sent the maximum number of virus infected email messages.
MSME 88 : Unwanted Content Detected History	The potentially unwanted content detected in email messages.
MSME 88 : Virus Cleaned Today	The number of virus infected email messages cleaned as on current date.
MSME 88 : Virus Detection history	The number of virus infected email messages detected.
MSME 88 : Virus Detection Today	The number of virus infected email messages detected as on current date.
MSME 88 : Viruses detected in the last one week	The number of virus infected email messages detected on each day during the last one week.

Custom query filters

You can create custom queries with TSME specific filters to retrieve information on TSME data.

Filter	Filters the results based on...
DAT Version (Trellix Security for Microsoft Exchange)	The version of the virus signature files installed on the client systems.
Engine Version (Trellix Security for Microsoft Exchange)	The version of the scanning engine software installed on the client systems.

Filter	Filters the results based on...
Hotfix/Patch Version (Trellix Security for Microsoft Exchange)	The patch version of the TSME software installed on the client systems.
Language (Trellix Security for Microsoft Exchange)	The language of the TSME software installed on the client systems.
Product Version (Trellix Security for Microsoft Exchange)	The version of the TSME software installed on the client systems.
Service Pack (Trellix Security for Microsoft Exchange)	The version of the Service Pack installed on the client systems.

Run a default query

Run the predefined **TSME** queries to generate reports based on **TSME** data.

Task

1. **Log on to Trellix ePO - On-prem as administrator.**
2. **Click Menu → Reporting → Queries & Reports.**
3. **From Shared Groups in the Groups pane, select MSME88REPORTS.**
4. **Select a query from the Queries list, then click Run. In the query result page, click any item in the results to drill down further.**

   Note

   To generate custom reports, duplicate a predefined query, then modify it per your requirements. For detailed instructions on working with queries, see the product guide for your version of **Trellix ePO - On-prem** software.

5. **Click Close when finished.**

Create and schedule tasks

Create TSME client tasks on your Microsoft Exchange systems to schedule automated actions.

Schedule automatic updates

Schedule automatic updates to keep your software up-to-date with the latest anti-virus definitions (DATs), and anti-virus scanning engine.

Note

Trellix recommends that you run the **TSME** automatic update task explicitly.

Task

1. Log on to the Trellix ePO - On-prem server as an administrator.
2. Click Menu → Systems → System Tree, then select the required group or systems.
3. Click the Assigned Client Tasks tab, then click Actions → New Client Task Assignment. The Client Task Assignment Builder screen appears.
4. Define these options, then click Create New Task.
   a. For Product, select Trellix Security for Microsoft Exchange 8.8.1.
   b. For Task Type, select AutoUpdate Task.
5. Type a name for the task, and any notes, then click Save. The task is listed in the Task Name
6. Select the task and click Next.
7. Schedule the task as required, then click Next to view a summary of the task.
8. Review the summary of the task, then click Save.
9. In the System Tree page, select the systems or groups where you assigned the task, then click Wake Up Agents.
10. In the Wake Up Trellix Agent screen, select Force complete policy and task update, then click OK.

Schedule an on-demand scan

Schedule an on-demand scan to scan your Microsoft Exchange servers to find a threat, vulnerability, or other potentially unwanted code.

Before you begin

Make sure that you do not remove the **MSMEODuser** from active directory, that was created during the product installation. This user is required for performing on-demand scans on mailboxes.

Task

1. Log on to the ePolicy Orchestrator - On-prem server as an administrator.
2. Click Menu → Systems → System Tree, then select the required group or systems.
3. Click the Assigned Client Tasks tab, then click Actions → New Client Task Assignment. The Client Task Assignment Builder page appears.
4. Define these options, then click Create New Task.
   a. For Product, select Trellix Security for Microsoft Exchange 8.8.1
   b. For Task Type, select On Demand Scan Task.
5. Type a name for the task, and any notes, then click Save. The task is listed in the Task Name.
6. On the Create New Task page, define these options, then click Save:
   - Task Name
   - Description
   - Resumable Scanning
   - Select Policy
   - Advanced Filters

Tip

Check the **Resumable Scanning** option to schedule the on-demand scan task for large volume items.

7. **Select the task, then click Next.**
8. **Schedule the task as required, then click Next to view a summary of the task.**
9. **Review the summary of the task, then click Save.**
10. **In the System Tree page, select the systems or groups where you assigned the task, then click Wake Up Agents.**
11. **In the Wake Up Trellix Agent screen, select Force complete policy and task update, then click OK.**

Note

During the scan, the complete store database is scanned.

On-demand scanning events are reported to **ePolicy Orchestrator - On-prem** with the details start time, stop time, completed time, and infection status.

Schedule to send status report

Schedule to send the status report to an administrator at a specific time.

You can configure these settings in the status report task wizard.

- When to send the status report
- A time limit for the reporting task
- Recipients of the status report
- A name for the report task to help identify it

Task

1. **Log on to the Trellix ePO - On-prem server as an administrator.**
2. **Click Menu → Systems → System Tree, then select the required group or systems.**
3. **Click the Assigned Client Tasks tab, then click Actions → New Client Task Assignment. The Client Task Assignment Builder page appears.**
4. **Define these options, then click Create New Task.**
   a. **For Product, select Trellix Security for Microsoft Exchange 8.8.1**
   b. **For Task Type, select Status Report Task.**
5. **Type a name for the task, and any notes, then click Save. The task is listed in the Task Name.**
6. **On the Create Task Catalog page, define these options, then click Save:**
    - **Task Name**
    - **Description**
    - **Recipient E-mail**
    - **Subject line for report**
    - **Number of Rows**
    - **Type of Report**
7. **Select the task and click Next.**

8. Schedule the task as required, then click Next to view a summary of the task.
9. Review the summary of the task, then click Save.
10. In the System Tree page, select the systems or groups where you assigned the task, then click Wake Up Agents.
11. In the Wake Up Trellix Agent screen, select Force complete policy and task update, then click OK.

Schedule to send configuration report

Schedule to send the configuration report to an administrator at a specific time.

Task

1. Log on to the Trellix ePO - On-prem server as an administrator.
2. Click Menu → Systems → System Tree, then select the required group or systems.
3. Click the Assigned Client Tasks tab, then click Actions → New Client Task Assignment. The Client Task Assignment Builder page appears.
4. Define these options, then click Create New Task.
   a. For Product, select Trellix Security for Microsoft Exchange 8.8.1.
   b. For Task Type, select Configuration Report Task.
5. Type a name for the task, and any notes, then click Save. The task is listed in the Task Name.
6. On the Create New Task page, define these options, then click Save:
   - Task Name
   - Description
   - Recipient E-mail
   - Subject line for report
7. Select the task, then click Next.
8. Schedule the task as required, then click Next to view a summary of the task.
9. Review the summary of the task, then click Save.
10. In the System Tree page, select the systems or groups where you assigned the task, then click Wake Up Agents.
11. In the Wake Up Trellix Agent screen, select Force complete policy and task update, then click OK.

Note

During the scan, the complete store database is scanned.

Schedule a task to purge the old DAT files

Schedule a task to purge the old DAT files from the managed systems.

Task

1. Log on to the Trellix ePO - On-prem server as an administrator.
2. Click Menu → System Tree, then select the required group or systems.
3. Click the Assigned Client Tasks tab, then click Actions | New Client Task Assignment. The Client Task Assignment. Builder screen appears.
4. Define these options, then click Create New Task:

   a. **For Product, select Trellix Security for Microsoft Exchange 8.8.1**
   b. **For Task Type, select PurgeOldDats Task.**
5. **Type a name for the task, and any notes, then click Save. The task is listed in the Task Name**
6. **Select the task and click Next.**
7. **Schedule the task as required, then click Next to view a summary of the task.**
8. **Review the summary of the task, then click Save.**
9. **In the System Tree page, select the systems or groups where you assigned the task, then click Wake Up Agents.**
10. **In the Wake Up Trellix Agent screen, select Force complete policy and task update, then click OK.**

Note

For the number of DAT files, the policy uses the managed system's **TSME** configuration defined in **DAT Settings**.

Filter events

Specify which TSME events generated from the client systems are to be forwarded to the server.

By default, all TSME events are enabled. Filter events based on the bandwidth used in your environment, and event-based queries required.

For more details on event filtering, see the product guide for your version of the ePolicy Orchestrator software.

Task

1. **Log on to the ePolicy Orchestrator server as an administrator.**
2. **Click Menu → Configuration → Server Settings, select Event filtering, then click Edit at the bottom of the page.**
3. **Select All events to the server to forward all events to the ePolicy Orchestrator server, or select Only selected events to the server and select the TSME specific client events that you want to forward.**
   TSME events are prefixed with **Trellix Security for Microsoft Exchange** such as these:
   - **34150: Trellix Security for Microsoft Exchange Packer detected (High)**
   - **34152: Trellix Security for Microsoft Exchange Mail size filter rule triggered (Medium)**
   - **34153: Trellix Security for Microsoft Exchange Signed content detected (Medium)**
   - **34154: Trellix Security for Microsoft Exchange Encrypted content detected (Medium)**
   - **34155: Trellix Security for Microsoft Exchange Corrupted content detected (Medium)**
   - **34156: Trellix Security for Microsoft Exchange Denial of service triggered (High)**
   - **34157: Trellix Security for Microsoft Exchange Protected content triggered (Medium)**
   - **34158: Trellix Security for Microsoft Exchange Password protected content detected (Medium)**
   - **34159: Trellix Security for Microsoft Exchange Blocked mime type detected (Medium)**
   - **34160: Trellix Security for Microsoft Exchange statistics and average scan time (Info)**
   - **34161: Trellix Security for Microsoft Exchange TIE detection (Medium)**
4. **Click Save.**

Results

The selected events are forwarded at the next agent-server communication.

Configure automatic responses

Configure and schedule the **TSME** product health alerts to notify you on the product status.

Before you begin

Configure the **Mail Notifications** policy with the **Alert ePolicy Orchestrator** option as enabled.

For more details on automatic responses, see the product guide for your version of the **ePolicy Orchestrator - On-prem** software.

Task

1. **Log on to the ePolicy Orchestrator - On-prem server as an administrator.**
2. **Click Menu → Automation → Automatic Responses, then click Edit next to MSME 88: Product Health Alert Notification. Alternatively, duplicate MSME 88: Product Health Alert Notification and edit its copy to retain the default values in the predefined notification.**
3. **In the Description step, select Enable, then click Next.**
4. **In the Filter step, select Threat Action Taken from available properties, select an appropriate comparison criteria, select the value as MSME88PHA, then click Next.**

   Note

   You can also select other appropriate filters, as required.

5. **In the Aggregation step, select the appropriate aggregation, grouping, and throttling options, as required, then click Next.**
6. **In the Actions step, select Send Email, complete these options, then click Next.**
   - **Recipients** — Email address of the health alert recipients.
   - **Importance** — Importance of the email notification: **High**, **Medium**, or **Low**.
   - **Subject** — Subject line for the email notification. Insert variables to include dynamic content. For example, event description.
   - **Body** — Body text of the email notification. Update the existing body text template, as required. The template uses variables to include dynamic content.
7. **Review the summary, then click Save.**

Results

The selected recipients are notified, as configured.

Troubleshooting

Determine and troubleshoot issues while using TSME. Learn about the available performance counters and important registry keys associated with this product.

Default Vs. Enhanced configuration settings

Based on your requirement you can configure **TSME** to perform for maximum performance or maximum protection.

To modify your **TSME** configuration settings, go to **Settings & Diagnostics** → **Import and Export Configuration**. You can use:

- **Restore Default** — To configure **TSME** for maximum performance.
- **Restore Enhanced** — To configure **TSME** for maximum protection.

Differences between Default and Enhanced configuration

Feature	Default	Enhanced
IP reputation	Disabled	Enabled
Maximum nesting level	10	50
Password Protected file	Allow through	Replace and quarantine
Protected file	Allow through	Replace and quarantine
File filter	Disabled	Enabled with default rule (*.exe, *.com, *.bat, *.scr)
Encrypted file	Allow through	Replace and quarantine
Corrupted file	Allow through	Replace and quarantine
Mail URL Reputation	Disabled	Enabled only for on-access scanning policies.

Important registry keys

Create these registry keys when the significance matches with your requirements.

TSME — Important registry keys

Registry Key	Path	Significance
Name: ODUserID Type: REG_SZ Value: [Example: <admin@domain.com>]	**HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\McAfee\MSME\E2007**	Valid only for all Exchange Mailbox servers. Should be the email address of the On-demand user created by the product, used for interacting with Exchange web services for getting mail data from exchange database.
Name: IPBlackList Type: REG_SZ Value: [Example: 10.0.0.1]	**HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\McAfee\MSME\SystemState**	Manually block a specific IP address or a range of IP addresses from sending emails to your organization in spite of its IP reputation.

Frequently asked questions

Provides answers to common situations that you might encounter when installing or using the product and contains troubleshooting information in the form of frequently asked questions.

Note

To view an updated list of questions associated with this release, see the **Trellix** KnowledgeBase article KB76886.

General

Here are answers to general frequently asked questions.

Can email delivery be prioritized?

No. It cannot be prioritized, as this is an Exchange server task.

Do I still need to enable anonymous access to exchange server receive connector?

TSME does not require anonymous access to exchange receive connector. The on-demand user takes care of these functions. For more information on configuring anonymous access settings, see **Trellix** KnowledgeBase article KB81752.

Why should I use "Run as administrator" option in Windows 2012, 2016, or 2019 to open the TSME user interface?

Due to security reasons, **TSME** will not be able to communicate with the RPC servers. This is due to the SID having no permission to do Inter-process communication (IPC) with the RPC process.

Under which executable does the scanning modules of TSME gets loaded across all Exchange versions?

The **RPCServ.exe** process loads all the scanning binaries. To find the process id of the scanner process, check the command line in **Task Manager** and see which **RPCServ.exe** process has the command line parameter: /EVENTNAME:Global\MSME_scanner_RPCEvent.

What is the optimum TSME configuration?

The configurations are for **Enhanced protection** and **Maximum performance**. The default configuration is to have maximum performance.

What should I exclude if TSME and a file level anti-virus is installed on the same server?

Exclude all the **TSME** binary folders and sub-folders, Postgres database, Replication folders, Exchange folders, **Trellix ePO - On-prem** events folder, and product log.

How do I access the product interface of the remote system?

To access the remote **TSME** standalone interface:

1. Launch **Trellix Security for Microsoft Exchange - Product Configuration**.
2. From the **Change Server** menu, click **New Connection**.
3. In the **Browse for Computer** dialog box, type the IP address of the remote system, then click **OK**

To access the remote **TSME** web interface:

1. Launch **Trellix Security for Microsoft Exchange - Product Configuration (Web Interface)**.
2. In the address bar, type: `https://<Remote system IP Address>/MSME/0409/html/index.htm`
3. Provide the login credentials when prompted.

How does TSME connect with the TIE server?

TSME connects with the **TIE** server through **Data Exchange Layer (DXL)** from **Trellix ePO - On-prem**. The **Trellix ePO - On-prem** that manages **TSME** should also manage the **TIE** server.

How do I configure the TIE server in TSME?

You can't configure the TIE server directly from **TSME**. However, your **Trellix ePO - On-prem** server that manages **TSME**, should manage the TIE server also. For integrating the TIE server with **Trellix ePO - On-prem**, see *Trellix Threat Intelligence Exchange Product Guide*.

Policy Manager

Here are answers to frequently asked questions on the **Policy Manager** feature.

How do I create and use email policies?

Always create policies on gateway servers using the SMTP addresses and on mailbox servers using Active Directory (AD) groups. On Mailbox server, designing policies based on SMTP addresses will be very costly, as the product does not get SMTP addresses and in order to resolve the same, AD queries are made. Doing this will slow down the performance on the Mailbox servers.

Do domain names in policies affect performance?

Yes. For detailed explanation, see the previous question *How do I create and use email policies*.

How does policy priority work?

Whenever a child policy gets satisfied first based on the priority of resolution, the next policy is never evaluated.

Is it beneficial to have multiple policies and will it affect the server performance?

Yes, this will affect performance. During policy evaluation, when the first child policy is not satisfied and next policy is evaluated, there may be AD queries which might have to be made, thus resulting in slow performance.

How do I configure TSME to block executable files at a granular level?

You can do this using the **File Filtering Rules** option. For example, let us see how to filter specific executable files such as the Windows executables.

1. From the product's user interface, click **Policy Manager** → **On-Access (Primary policy)**.
2. Under **Core-Scanners**, click **File Filtering** and enable this option.
3. Under **Options**, click **Edit**.
4. Under **Available rules** drop-down list, select **<Create a new rule...>**.
5. Specify a rule name and under **File category filtering**, select **Enable file category filtering**.
6. From **File categories** list, select **Other specific formats**.

7. From **Subcategories** list, select **Windows Executables**.
8. Click **Save**.

What type of file is detected as Packers or PUPs, and from where I can control this setting?

Packers and PUPs belong to the malicious content category that is detected based on the category. Packers generally are files that are compressed or packed using some algorithm and then get de-compressed on execution.

Control this setting from **Anti-Virus settings** in the **TSME** user interface.

Settings and diagnostics

Here are answers to frequently asked questions on the **Settings & Diagnostics** feature.

Does enabling ca Trellix GTI use email latency?

Yes, there will be latency due to the email validation by **Trellix GTI** .

Can I export the blocked and allowed senders and recipients addresses from one TSME server to another?

Yes, you can export the blocked and allowed senders and recipients addresses from one **TSME** server to another. To do this:

1. From the product's user interface, click **Policy Manager**.
2. Under **Core-Scanners**.
3. Under **Options**, click **Edit**.
4. Click the **Mail Lists** tab, and then click **Export** to save all Blacklisted and Whitelisted senders/recipients to a CSV file.

Regular Expressions (regex)

Here are answers to frequently asked questions on the regular expressions (regex).

Does enabling regex cause email latency?

Yes, enabling regular expression causes email latency, as content scanning is a process intensive configuration.

Where do I find more information on regex?

Several websites on the Internet provide information on regular expressions.
To name a few, see:

- http://www.regular-expressions.info/reference.html
- http://www.regexbuddy.com/regex.html

How do I block certain Credit Card numbers and Social Security numbers using regex?

1. From the product's user interface, click **Policy Manager** → **Shared Resource**. The **Shared Resources** page appears.
2. In the **DLP and Compliance Dictionaries** tab, click **New Category** and specify a category name.
3. Click **OK**.
4. Under **DLP and Compliance Rules**, click **Create New**.
5. Specify the **Rule Name**, **Description** and under **Word or Phrase** specify the regular expression.

Example: How to validate Credit Card Numbers

Card type	Regular Expression	Description
Visa	^4[0-9]{12}(?:[0-9]{3})?$	All Visa card numbers start with number 4. New cards have 16 digits. Old cards have 13.
MasterCard	^5[1-5][0-9]{14}$	All MasterCard numbers start with the numbers 51 through 55. All have 16 digits.
American Express	^3[47][0-9]{13}$	American Express card numbers start with 34 or 37 and have 15 digits.
Diners Club	^3(?:0[0-5]|[68][0-9])[0-9]{11}$	Diners Club card numbers begin with 300 through 305, 36 or 38. All have 14 digits. There are Diners Club cards that begin with 5 and have 16 digits. These are a joint venture between Diners Club and MasterCard, and should be processed like a MasterCard.
Discover	^6(?:011|5[0-9]{2})[0-9]{12}$	Discover card numbers begin with 6011 or 65. All have 16 digits.
JCB	^(?:2131|1800|35\d{3})\d{11}$	JCB cards beginning with 2131 or 1800 have 15 digits. JCB cards beginning with 35 have 16 digits.

Based on the example mentioned above, you can also create a similar regular expression for Social Security numbers. For more examples on regular expressions, refer http://www.regular-expressions.info/examples.html.

6. Select the **Regular Expression** option and click **Save**.

7. Add this to the **DLP and Compliance** policy in **Policy Manager** by clicking **Policy Manager** → **On-Access (Primary policy)** → **DLP and Compliance**.
8. Under **Activation**, select **Enable**.
9. Under **DLP and Compliance rules and associated actions**, click **Add rule**.
10. Under **Select rules group**, select the regex rule that you created earlier from the drop-down list.
11. Specify the action to take, when the rule is triggered.
12. Click **Save**.

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