

Getting Started With Delegated Administration

Delegated Administration (available with Websense Corporate Edition software) is a powerful tool for distributing filtering and reporting responsibilities for particular client sets, and across locations. However, you must do a few simple setup tasks *first* to take full advantage of this feature.

Overview

You'll need to do the following to set Delegated Administration in motion:

- If you have more than one Policy Server, determine which site will act as the central site and house the central Policy Server.
- Configure your directory service via Websense Manager (especially critical if you are running Active Directory in Native mode).
- Add directory objects to Websense Manager.
- Add at least one user to the Super Administrator role.
- Create roles to designate the Delegated Administrators who will manage groups of similar clients.
- Configure administrative permissions for the roles by editing the Web Filter Lock.
- If you have multiple Policy Servers, distribute the Web Filter Lock to ensure common policy restrictions across your organization.

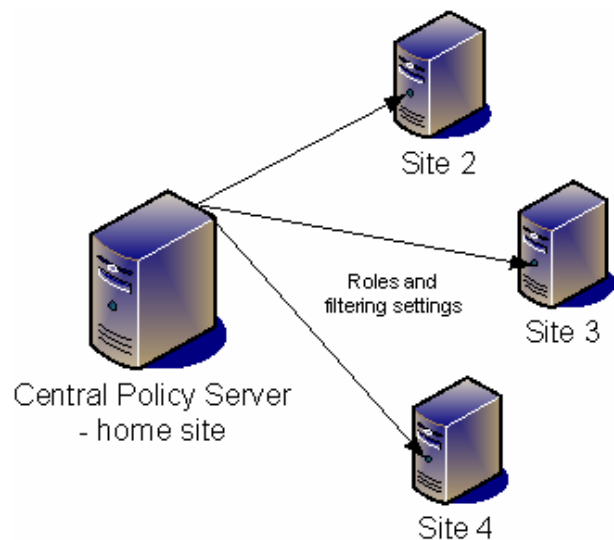
This tutorial explains how to get started. The *Websense Enterprise Administrator's Guide* provides detailed instructions for setting up Delegated Administration.

I. Determine the central Policy Server

The Web Filter Lock (see page 5) is configured by the Super Administrator at the central site, and then pushed to remote sites as needed.

Make sure you know which server should be the central one!

Define additional Policy Servers in Websense Manager: **Server > Add Policy Server**.

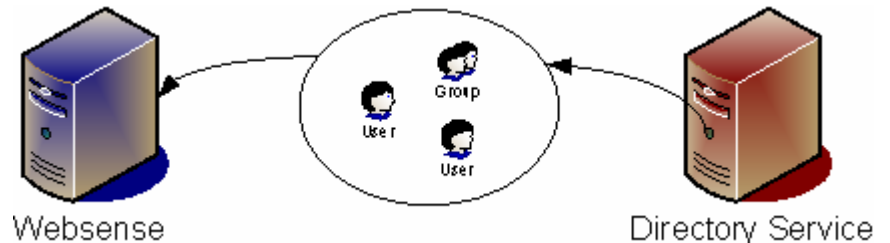


II. Configure the directory service

To appoint the Super Administrator and Delegated Administrators, add them *as directory objects* to administrative roles.

1. First, configure Websense to communicate with your directory service: Choose **Server > Settings > Directory Service**.

See the *User Identification* chapter of the *Websense Enterprise Administrator's Guide* for full procedures.



WARNING: If you are running Active Directory in Native Mode®, but assign Delegated Administrators to roles while Websense is configured to communicate in Mixed Mode®, those administrators will *not* be able to successfully log on to Websense to manage policy or run reports.

You must also configure domain forest information so Websense recognizes directory objects correctly.



III. Designate a Super Administrator

When you first install Websense Corporate Edition software, the default user is a “root” user with rights to set up other administrative roles. But...only the Super Administrator’s administrative actions are traceable via the Audit Log (see the *Server Administration* chapter of the *Websense Enterprise Administrator's Guide*).

Roles (administrative permissions), system configuration, and certain filtering settings are managed by Super Administrators only.



Add at least one user to the Super Administrator role *before* creating other roles:

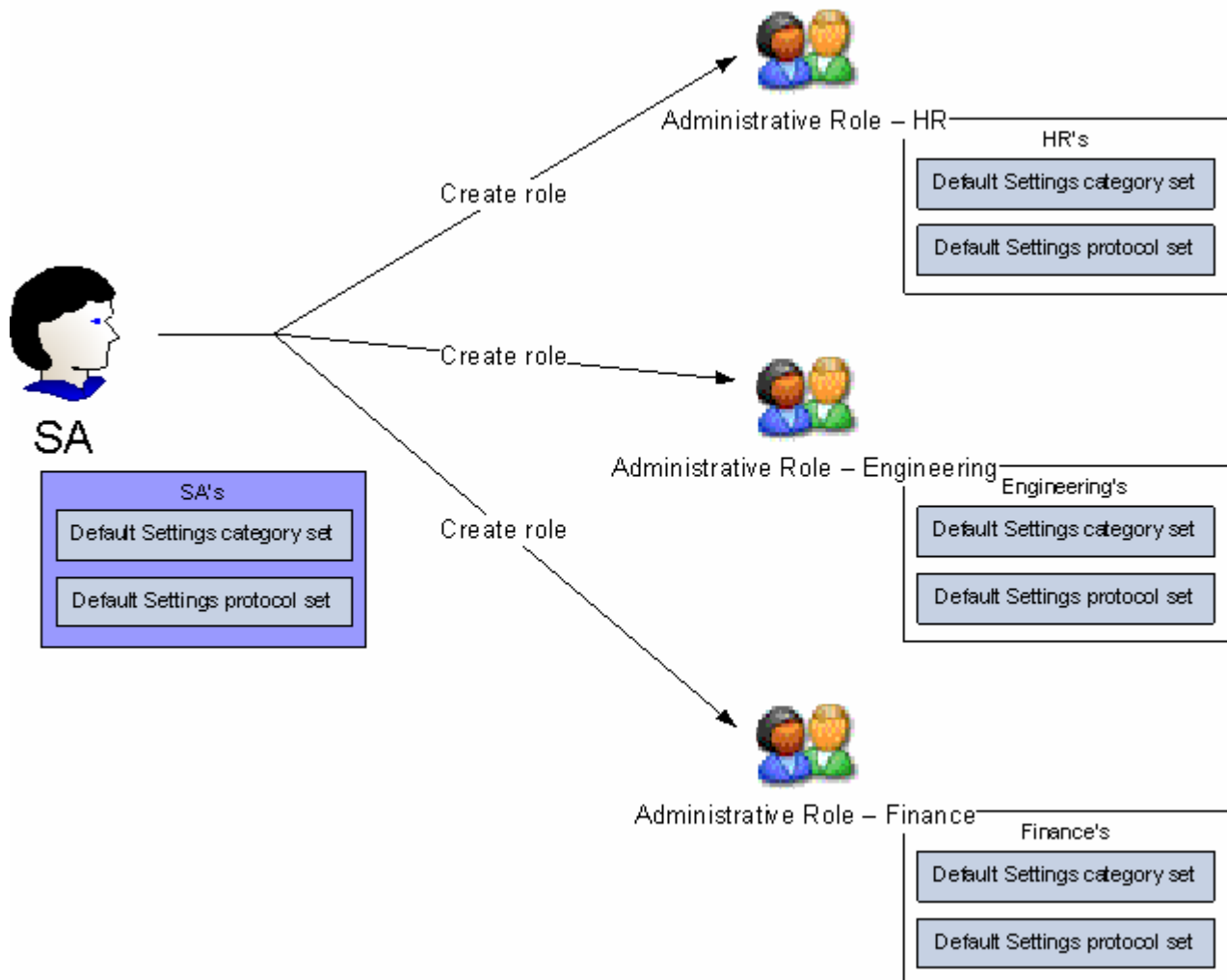
1. In the navigation tree, expand **Administration > Super Administrator**.
2. Next to **Managed Administrators**, click **Edit**.
3. Select the directory object to designate as the Super Administrator, and then click **Add**.
4. Click **OK**.

IV. Configure Default Filtering Settings

The **Default Settings** category set and **Default Settings** protocol set comprise the default filtering settings for all categories and protocols. These are copied and applied to any new role you create.

To ensure that the desired default settings are copied to all roles, the Super Administrator should verify (and edit if necessary) the **Default Settings** category set and **Default Settings** protocol set *before* creating new roles. These serve as the basis for policies managed and assigned by Delegated Administrators.

Delegated Administrators *can* modify settings, but may not need to. If necessary, Delegated Administrators can create new category sets and protocol sets based on the **Default Settings** category set and **Default Settings** protocol set.

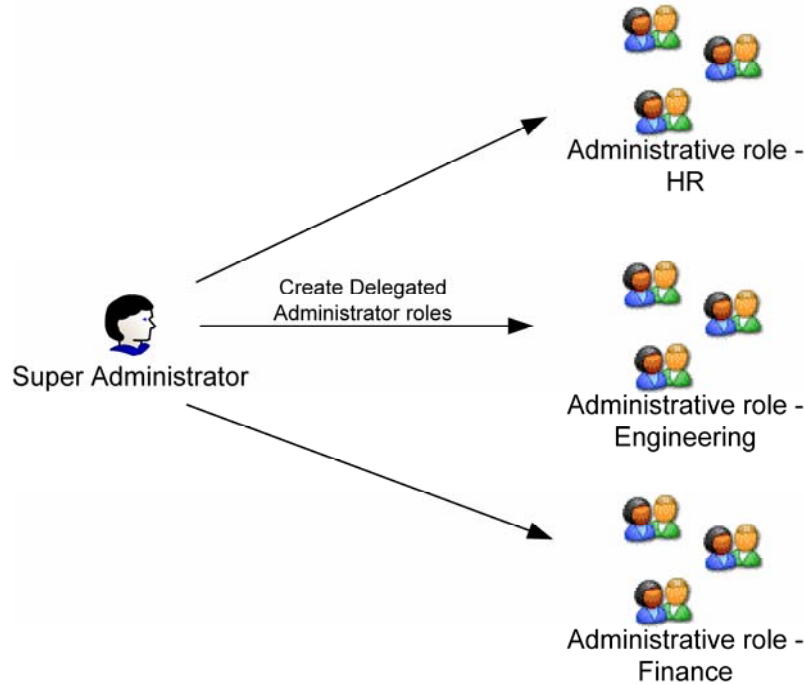


For example, your organization always sets quota time for *Sports*, *Shopping*, and *Travel* sites. You log on as the Super Administrator and edit the **Default Settings** category set so those categories are limited by quota. When you create a new role, the quota limit you just configured is carried over to that role.

WARNING: Changing the values in the Super Administrator role's **Default Settings** category set and **Default Settings** protocol set *after* creating roles will *not* propagate the changes to the new roles.

V. Populate Administrative Roles

As the Super Administrator, you create administrative roles, and then designate Delegated Administrators according to those roles. The Delegated Administrators for each role are assigned a set of clients (users, groups and workstations) to manage.



Do the following while logged on as a Super Administrator.

1. Create Delegated Administrator roles: Right-click in the Websense Manager navigation tree, and choose **Add New Role**.
2. Designate Delegated Administrators: Select the role you just created. Next to **Managed Administrators** in the content pane, click **Edit**.
 - Checking **Policy** enables the selected administrator to edit filtering policies governing this role.
 - Checking **Reporting** enables this administrator to run internet usage reports.
3. Add clients for this Delegated Administrator to manage: In the navigation tree, select the role to which to add clients. Next to **Managed Clients** in the content pane, click **Edit**.

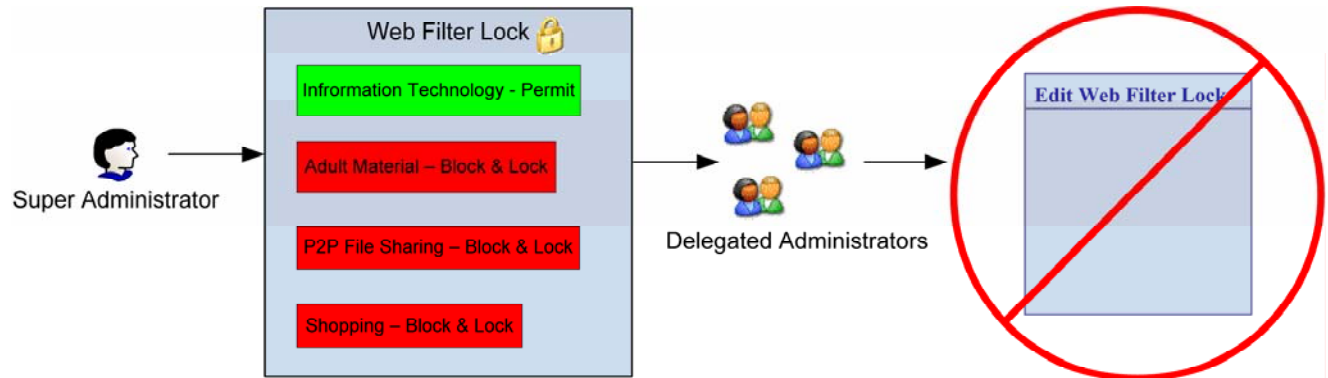
VI. Configure the Web Filter Lock

The Super Administrator can restrict which filtering settings Delegated Administrators can modify via the **Web Filter Lock**. The Super Administrator sets certain categories and protocols to be **Blocked & Locked**.

Delegated Administrators are prevented from granting their Managed Clients access to **Blocked & Locked** categories and protocols.

Super Administrators and their Managed Clients are the only ones *not* restricted by the Web Filter Lock.

To access the Web Filter Lock, expand **Filter Definitions** in the Websense Manager navigation tree.



For detailed information on Delegated Administration and Delegated Reporting, see the *Websense Enterprise Administrator's Guide*, *Websense Enterprise Reporting Administrator's Guide*, or your online Help.

Product documentation is available from:

<http://www.websense.com/global/en/SupportAndKB/ProductDocumentation/?Section=All>