

**InstaGate®**  
Internet Security Appliance

# SmartReports SoftPak

Part Number: IG-SR-092502

[www.esoft.com](http://www.esoft.com)

**eSoft™**

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# InstaGate SoftPak SmartReports

SmartReports is a SoftPak designed to deliver concise and flexible reports, making it simple for network administrators to analyze and understand how email, Web access, and bandwidth are being used. SmartReports data can help companies determine what is excessive or inappropriate Internet use, providing the opportunity to establish acceptable Internet usage policies, improve employee productivity, and increase bandwidth efficiency.

## Installing and Running SmartReports

When you subscribe to SmartReports through SoftPak Director, the installation files are downloaded to your InstaGate file server and placed in the following directory:

```
\\<HostName>\Admin\SoftPaks\SmartReports
```

(where <HostName> refers to your InstaGate's *Host Name*, specified in the administrative interface's *System>Local Options* page)

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**Note** To access the <HostName>\Admin folder, your Windows username and password (the username and password you enter when you first boot your computer) must be the same as your InstaGate account name and password. For example, if your InstaGate account name is *john* and your password is *password*, you must be logged into Windows with the username *john* and the password *password*. Your account name must also be designated as an InstaGate local system administrator in the administrative interface's *System>Administrator Settings* page.

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SmartReports runs on the Microsoft Windows family of operating systems. To install SmartReports:

1. Start Windows and ensure no other programs are running.
2. Select *Run* from the *Start* menu.

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3. Enter the following information in the dialog box:

`\\<HostName>\Admin\SoftPaks\SmartReports\SmartReports.exe`

4. Follow the installation instructions on the screen.
5. To launch SmartReports, select *SmartReports* from the *eSoft* program group in the Windows *Start* menu.

## Upgrading SmartReports

If you are upgrading from a previous version of SmartReports, the first time you run the program a prompt appears asking if you want to import your previous settings. Click *Yes* to automatically import all of your SmartReports data sources and reports. User accounts are not automatically imported, but can be manually converted using Microsoft Excel.

User accounts from previous versions of SmartReports are stored in the SmartReports installation directory in a file named *webusrs.xls*. These accounts must be copied from *webusrs.xls* and pasted in the file *accounts.xls*. Because account data is stored differently in the current version of SmartReports, you cannot simply rename *webusrs.xls*.

Finally, you can manually remove the *SmartReports* program group from your Windows *Start* menu, as the current version of SmartReports is located in the *eSoft* program group.

## Configuring SmartReports

The first time you run SmartReports, the Data Source Wizard is automatically launched. The Data Source Wizard allows you to specify the location of your InstaGate log files.

To configure SmartReports:

1. Select *SmartReports* from the *eSoft* program group in the Windows *Start* menu.
2. To run reports on both email and Web traffic, select *eSoft InstaGate* from the device list and click *Next*.
3. Read the instructions on how to access your InstaGate log files and click *Next*.
4. Specify the path of your InstaGate email log files. The default is:

`\\<HostName>\Admin\Logs\Mail.`

5. Specify the path of your InstaGate Web log files. The default is:

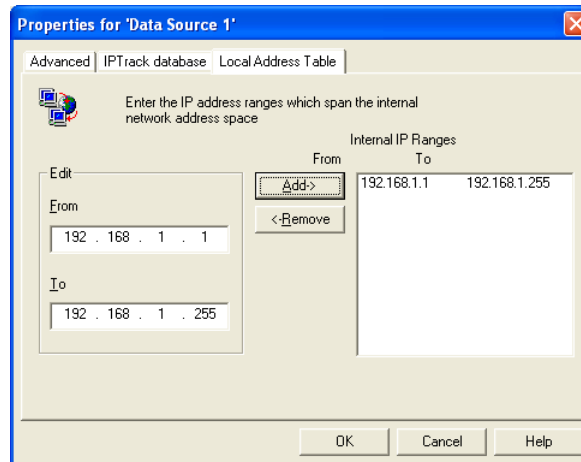
`\\<HostName>\Admin\Logs\WebProxy.`

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6. Click *Next*.
  7. InstaGate retains its system logs for one week. To import all the logs for the past week, select *Import all data*. To import the logs for specific days in the past week, select *Import a selection based on a date range*, and specify the date range.
  8. Click *Next*.
  9. Click *Finish*.
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**Note** You can modify the settings specified in the Data Source Wizard at any time by selecting the data source icon and choosing the menu item *Properties*.

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10. Right-click the data source icon (*Data Source 1*) and select *Advanced Properties*.
11. Select the *Local Address Table* tab.



12. Type in the range of internal IP addresses that are used on your network. The default is:  
**192 . 168 . 1 . 1 to 192 . 168 . 1 . 255.**  
Use the *Add* button to build up a list of IP Address ranges. Click the *Remove* button to remove an IP range from the list.
13. Click *OK*.

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## Creating a Report

To generate a report:

1. Click the *Report Definitions* icon in the *Views* panel.
2. Double-click the *Add New Report Definition* icon and complete the Add Report Definition Wizard. For a detailed description of each of the report settings, refer to the online help.
3. Right-click on the report you wish to run in the Report Definitions window, and select either *Run > To Screen* or *Run > To Output*.

If you select to run to screen, the report is generated and shown on screen.

The output methods used for reports (Disk, Printer, Mail, FTP) are created by selecting the *Outputs* icon in the *Views* panel. When you generate a report definition you choose an existing output to use with the report.

## Tracking Dynamic IP Addresses

SmartReports includes a utility named *IPTrack*. IPTrack maps IP addresses assigned by a DHCP server to machine names so you can identify user requests without using proxy authentication.

## Installing IPTrack

You can install IPTrack on clients running Windows NT 4.0, Windows 2000 or Windows XP.

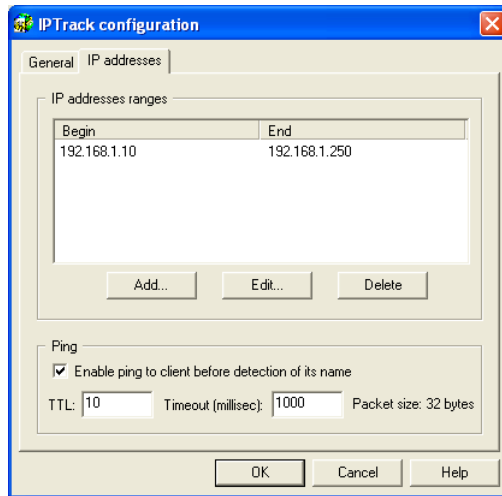
To install IPTrack:

1. Select *Run* from the Windows *Start* menu.
2. Enter the following information in the dialog box:  
`C:\Program Files\SmartReports\IPTrackInstall.exe`
3. Follow the installation instructions on the screen.

## Configuring IPTrack

To configure IPTrack:

1. Select *IPTrack Configuration* from the *eSoft* program group in the Windows *Start* menu.
2. Select the *IP addresses* tab.

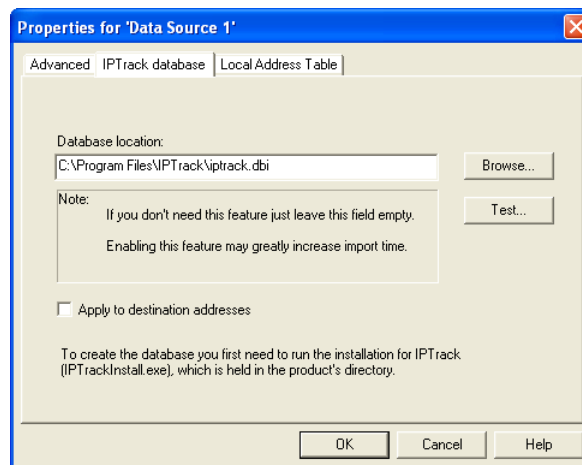


3. Click the *Add* button and type in the range of addresses used by your LAN or DHCP server.
4. Click *OK* to save the configuration.

## Configuring SmartReports to Access the IPTrack Database

To configure SmartReports to access the IPTrack database:

1. Right-click the data source icon (*Data Source 1*) and select *Advanced Properties*.
2. Select the *IPTrack database* tab.



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3. Enter the following information in the *Database location* field:

**C:\Program Files\IPTrack\iptrack.dbi**

4. Click *OK*.

## Registering SmartReports

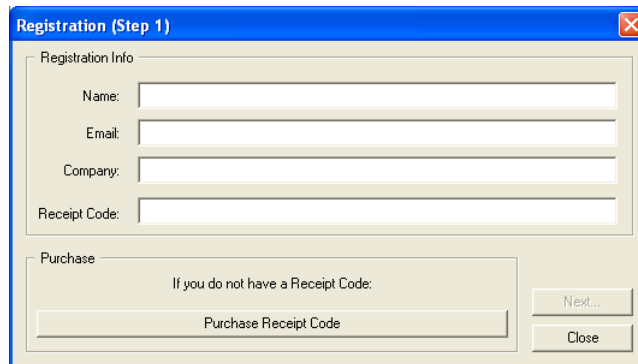
SmartReports can be purchased through InstaGate's SoftPak Director Catalog. After purchasing SmartReports, complete the following steps to register the product:

1. Select *Register* from the *Help* menu.
2. Click *Purchase Receipt Code*.
3. A registration form is opened in Notepad. Enter your InstaGate serial number in the registration form and email it to:

**smartreports.registration@esoft.com**

Upon receiving your request, eSoft will email you a Receipt Code within one business day.

4. Select *Register* again from the *Help* menu.



The image shows a Windows-style dialog box titled "Registration (Step 1)". It has a blue title bar with a close button (X) in the top right corner. The dialog is divided into two sections. The top section, "Registration Info", contains four text input fields labeled "Name:", "Email:", "Company:", and "Receipt Code:". The bottom section, "Purchase", contains a text area with the text "If you do not have a Receipt Code:" and a "Purchase Receipt Code" button. To the right of this section are two buttons: "Next..." and "Close".

5. Complete the following fields in the Registration dialog box:
  - **Name:**
  - **Email:**
  - **Company:**
  - **Receipt Code:** (provided by eSoft)
6. Click *Next*.
7. Click *Register Online* to complete the registration process.