Worry-Free™ Remote Manager™

for Small and Medium Business

Quick Start Guide

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Service Name and Version No.: Trend Micro™ Worry-Free™ Remote Manager 2.6

The user documentation for Trend Micro™ Worry-Free™ Remote Manager is intended to introduce the main features of the service. You should read it prior to using the service.

Detailed information about how to use specific features within the service are available in the online help, the Getting Started Guide for Resellers, and the Knowledge Base at the Trend Micro Web site.

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WFRM 2.5 Quick Start Guide

Introduction

This Quick Start Guide provides information for:

Installing the WFRM Agent on:

- Client Server Security (CS) versions 3.5 and 3.6
- Client Server Messaging Security (CSM) versions 3.5 and 3.6

Registering the following to the WFRM console:

- Worry-Free™ Business Security Services (WFBS-SVC) version 3.x
- Hosted Email Security version 1.x

Connecting the following to the WFRM console:

- Kaseya
- Autotask

What is Worry-Free Remote Manager?

Trend Micro™ Worry-Free™ Remote Manager (WFRM) enables you to monitor the health of multiple managed networks via multiple, managed products and services. Worry-Free Remote Manager allows reseller administrators to issue commands to manage critical aspects of network security.

WFRM is hosted on regional Trend Micro Data Center servers where resellers obtain an account. Resellers can use Worry-Free Remote Manager to establish customer accounts, monitor customer networks, and manage security using the WFRM console.

Worry-Free Remote Manager (WFRM) presently monitors the following products:

- Worry-Free Business Security Standard (WFBS-S) (formerly CS) versions 5.x, 6.x, 7.x
- Worry-Free Business Security Advanced (WFBS-A) (formerly CSM) versions 5.x, 6.x, 7.x
- Worry-Free Business Security Services (WFBS-SVC) version 3.x

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Note: CS/CSM WFBS(A) and WFBS-SVC are collectively referred to as WFBS(ALL)[1] where appropriate.

- Trend Micro™ Hosted Email Security version 1.x[2]

Note: CS/CSM WFBS(A), WFBS-SVC, and Hosted Email Security are collectively referred to as "managed products" and/or "managed services" in this document.

Worry-Free Remote Manager has a monitoring dashboard that allows resellers to look into the following aspects of network security:

- WFBS(ALL):
  - Virus, network virus, and spyware/grayware incidents
  - Spam and phishing incidents
  - Unauthorized computer changes
  - Outbreak situations
  - License and update status of security products
  - Disk usage on desktops, servers, and Exchange servers (CS/CSM WFBS(A) only)
  - Key security indicators
- Hosted Email Security:
  - Total Email Message Traffic
  - Accepted Email Message Size
  - Threat Summary
  - Top Spam Recipients
  - Top Virus Recipients

Note: For detailed information on Hosted Email Security and WFBS(ALL), see the documentation for those products.

Worry-Free Remote Manager offers a structured view of customer networks and allows resellers to issue commands and manage the following aspects of network security:

- Component updates and updates to the managed server
- Vulnerability assessment
- Damage cleanup
- Automatic outbreak response
- Firewall and real-time scan settings
- Manual scans

Worry-Free Remote Manager also supports comprehensive reporting features and allows resellers to subscribe individuals to automatically generated reports.

Before providing WFRM services …

Before providing this service to the customer, make sure that you have the customer's consent to perform the following remote management and monitoring activities:

- View the list of computers on the network
- View the following security information:
  - Threat detections

1. WFBS(A), WFBS(S), and WFBS-SVC are collectively referred to as WFBS(ALL) where appropriate.
2. InterScan Messaging Hosted Security was renamed to Hosted Email Security in WFRM 2.2 SP1.

  - Names (and the number) of infected computers
  - Names of infected files
  - Users that have received infected files or have known MS vulnerabilities
  - License and system information of managed servers
- Send email notifications to individuals within the customer's organization
- Perform the following actions:
  - Deploy security components
  - Start or stop manual scans
  - Start or stop Vulnerability Assessment
  - Start or stop Damage Cleanup Services
  - Start or stop Outbreak Prevention Services
  - Update the managed server
- Configure settings for the following items:
  - Outbreak Prevention Services
  - Real-time scan
  - Firewall
  - Location Awareness
  - Behavior Monitoring

Browser Requirements

- Connection to the Internet
- Internet Explorer™ 6.0, 7.0 and 8.0 with the latest service packs
- WFRM logon account information from Trend Micro

Prepare Your Browser

- Make sure Internet Explorer's security level for Trusted sites is set to medium or low. A more restrictive security level may prevent the console from displaying correctly.
- Make sure pop-up blockers on your Web browser have been disabled or set to allow pop-ups from the WFRM URL. Pop-up blockers can prevent some of the console's pop-up windows from opening.

Agent Installation for WFBS(A) 5.0/5.1

Go to the WFRM Web Console

Go to http://wfrm.trendmicro.com and choose the appropriate region.

Add the customer to WFRM

1. Log on to the WFRM Web console.
2. Click **Customers** (tab) >  **Add customer** (icon at top of left pane).
3. Fill in at least the required customer information and click **Next**.
4. Fill in at least the required contact information and click **Next**.
5. Click **Add Product/Service Now**.
6. Select the product to add and click **Next**.

7. WFRM presents you with the Globally Unique Identifier (GUID) for WFBS(A) 5.0/5.1. Save this for installing the Agent on WFBS-A.

What is an Agent GUID?

To distinguish between WFRM Agents, Worry-Free Remote Manager assigns a globally unique identifier (GUID) to each Agent. Every time you add a managed server, WFRM generates a GUID for that managed server's Agent. At that point, no Agent program is using the GUID. The administrator who installs the Agent program on the managed server must input the GUID during installation to allow the Agent program to register to the console.

Example of a WFRM Agent GUID:

4F6F0F8697C9-A1FFCF63-D833-84D9-1C35

Install the Agent on WFBS(A) 5.0/5.1

The Agent installs on the managed server. To ensure that the Agent installation goes smoothly, prepare the following in advance:

- Agent GUID
- Agent installer - http://www.trendmicro.com/ftp/products/wfrm/WFRMAgentforCSM.exe

The managed server must meet the following requirements:

1. WFBS/WFBS-A 5.0 or 5.1
2. Active Internet connection
3. 50MB available hard disk space

To install the Agent:

1. Copy the Agent installation file (`WFRMAgentforCSM.exe`) to the managed server.
2. Open the installation file.
3. Select the installation language.
4. The **InstallShield Wizard Welcome** screen opens. Click **Next**.
5. The **License Agreement** screen opens. Read the license agreement carefully. If you disagree with the terms of the license agreement, click **Cancel** to exit the installation. If you agree with the terms, click **I accept the terms of the license agreement** and click **Next**.
6. Provide your name and the name of your company and click **Next**.
7. The Installation Location screen opens. To use the default location, click **Next**.
8. Provide the FQDN of the Worry-Free Remote Manager server that corresponds to your region in the **Server address** field.

   FQDN of Worry Free Remote Manager servers

   - **Asia Pacific:** `wfrm-apaca.trendmicro.com`
   - **Europe and the Middle East:** `wfrm-emeaa.trendmicro.com`
   - **Japan:** `wfrm-jpa.trendmicro.com`
   - **Latin America:** `wfrm-lara.trendmicro.com`
   - **North America:** `wfrm-usa.trendmicro.com`
9. Select a communication protocol and port:

   For HTTPS (recommended), use port 443. Enter the path and filename of the SSL certificate or click the Browse button to locate the SSL certificate (see the "Agent Installation Guide" or "GSG for Resellers" for more information on how to obtain the certificate). Click **Next** (Do not click User Authentication; it is not being used at this time).
10. If the managed server uses a proxy server to connect to the Internet, specify the necessary settings. Click **Next**.

11. Type the GUID. Click **Next**.
12. Review the installation settings and click **Next**.
13. Click **Finish** to close the wizard after installation completes.

Agent Pre-installation for WFBS-S/WFBS-A 6.0 and above

Before installing the agent, perform the following high-level steps:

1. Add the customer to WFRM.
2. Select the product and record the product GUID.

Go to the WFRM Web Console

Go to http://wfrm.trendmicro.com and choose the appropriate region.

Add the WFBS-S/WFBS-A customer to WFRM

1. Log on to the WFRM Web console.
2. Click **Customers** (tab) **>** **Add customer** (icon at top of left pane).
3. Fill in at least the required customer information and click **Next**.
4. Fill in at least the required contact information and click **Next**.
5. Click **Add Product/Service Now**.
6. Select the product to be added and click **Next**.
7. WFRM presents you with the Globally Unique Identifier (GUID) for WFBS-S/WFBS-A. Save this for installing the Agent on WFBS-S/WFBS-A.

What is an Agent GUID?

To distinguish between WFRM Agents, Worry-Free Remote Manager assigns a globally unique identifier (GUID) to each Agent. Every time you add a managed server, WFRM generates a GUID for that managed server's Agent. At that point, no Agent program is using the GUID. The administrator who installs the Agent program on the managed server must input the GUID during installation to allow the Agent program to register to the console.

Example of a WFRM Agent GUID:

4F6F0F8697C9-A1FFCF63-D833-84D9-1C35

Now you can install the WFRM agent. For installation procedures, refer to the WFBS Installation Guide. If the installation is successful and settings are correct, the Agent should automatically register to the Worry-Free Remote Manager server. The Agent should show as Online on the WFRM console.

Registering WFBS-SVC to WFRM

This section contains information for registering Worry-Free™ Business Security Services to the WFRM console.

Add the WFBS-SVC customer to WFRM

1. Log on to the WFRM Web console.
2. Click **Customers** (tab) **>** **Add customer** (icon at top of left pane).
3. Fill in at least the required customer information and click **Next**.

4. Fill in at least the required contact information and click **Next**.
5. Click **Add Product/Service Now**.
6. Select **Worry-Free™ Business Security Services** and click **Next**.
7. WFRM presents you with an Authorization Key. Save this for attaching WFBS-SVC to the WFRM console.

Enter the Authorization Key on WFBS-SVC

In order to manage Worry-Free Business Security Services from the WFRM console, a customer's WFBS-SVC account must register with WFRM by carrying out the following:

1. Log on to the customer's WFBS-SVC account.
2. Click **Administration > Worry-Free Remote Manager**.
3. Type the Authorization Key and click **Connect**.
4. You will be informed if the connection was successful.

Registering Hosted Email Security to WFRM

This section contains information for registering InsterScan Messaging Hosted Security to the WFRM console.

Add the Hosted Email Security customer to WFRM

1. Log on to the WFRM Web console.
2. Click **Customers** (tab) **>** **Add customer** (icon at top of left pane).
3. Fill in at least the required customer information and click **Next**.
4. Fill in at least the required contact information and click **Next**.
5. Click **Add Product/Service Now**.
6. Select **Hosted Email Security** and click **Next**.
7. WFRM presents you with an Authorization Key. Save this for attaching Hosted Email Security to the WFRM console.

Enter the Authorization Key on Hosted Email Security

1. Log on to the customer's Hosted Email Security account.
2. Click **Administration > Remote Manager**.
3. Enter the Authorization Key and click **Connect**.
4. You will be informed if the connection was successful.

Verifying Agent-Server Connectivity

To verify the WFRM Agent has registered with the WFRM server:

1. Log on to the WFRM Web console.
2. Click **Customers** (tab) **> All Customers** (on the tree) **> All Agents** (right pane)
3. The tab lists the status of each Agent in the Status column.

You may now start managing the customer's managed servers from the WFRM console.

For more information on how to use WFRM, read the *Worry-Free Remote Manager Getting Started Guide for Resellers* or the *Online Help*.

Integrating Kaseya with WFRM

Kaseya Settings in WFRM

Add Kaseya email accounts and notification recipient to the WFRM console as follows:

1. Click **Administration > Account Information**.

   The Account Information tab appears.

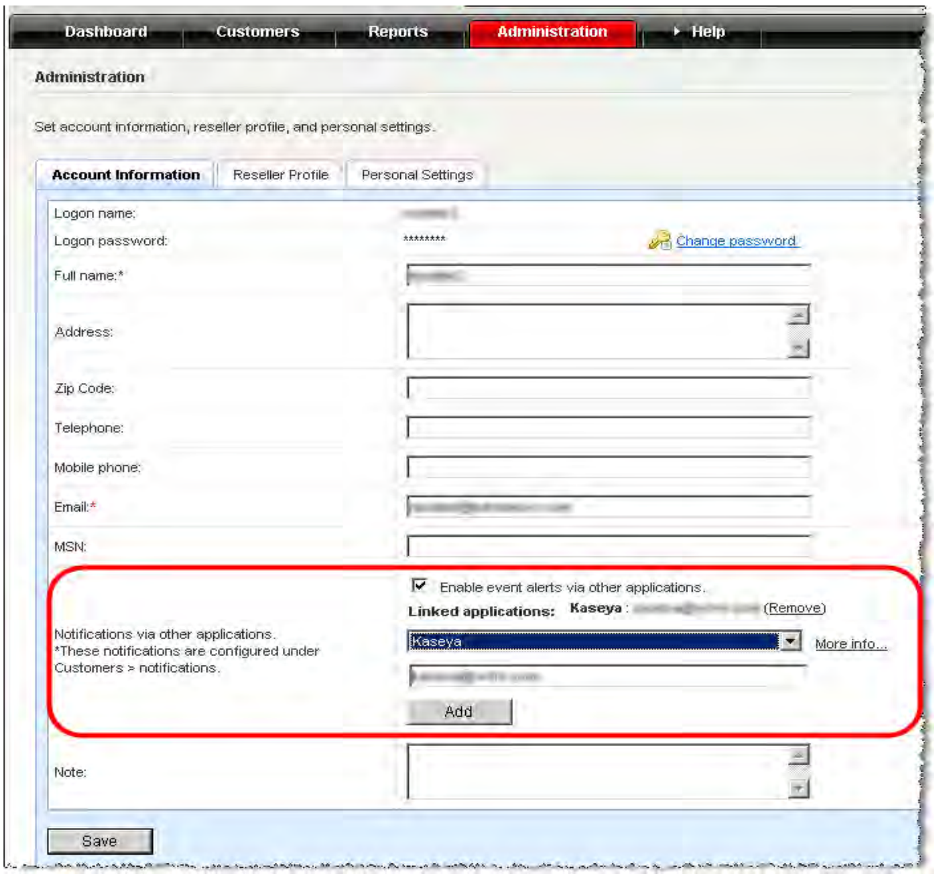

FIGURE 1-1. Account Information Notifications Group Box

2. Click **Enable event alerts via other applications** and select `Kaseya` from the **Linked applications** drop-down list.
3. Add the Kaseya user email and click **Add**.
4. Kaseya appears as a linked application. Click **Save**.

5. Add the notification recipient for the Kaseya user under **Customers > Notification > Notification Recipient (Edit)**.

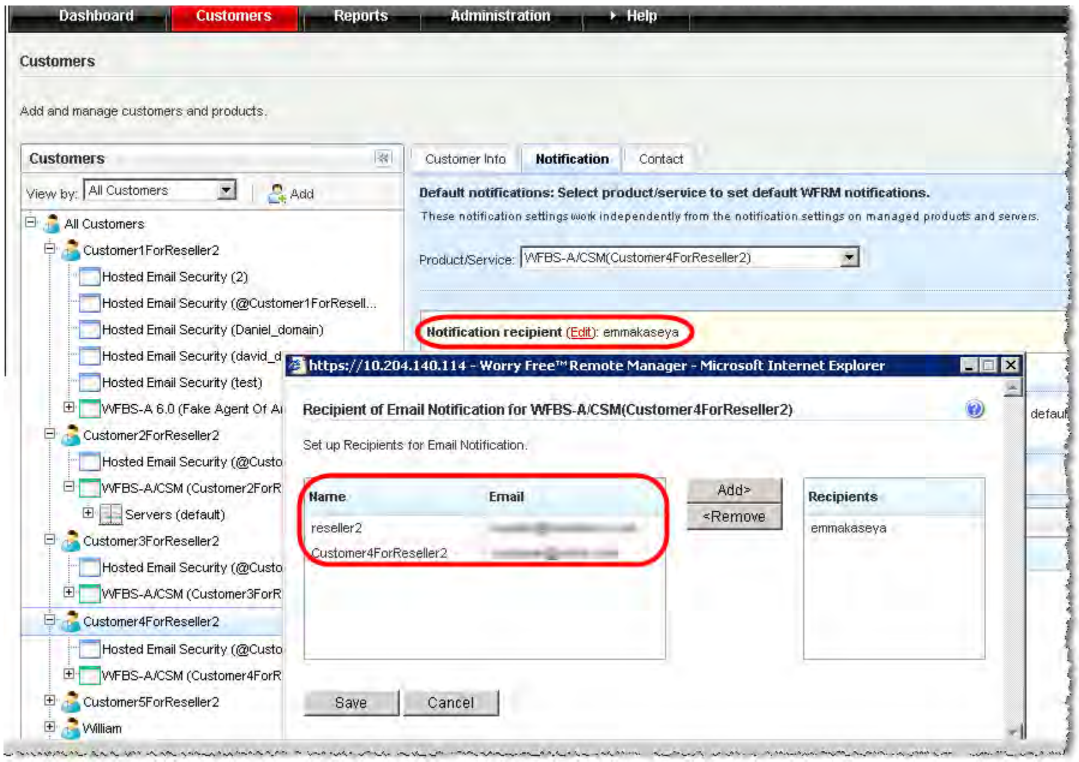

FIGURE 1-2. Customers > Notification > Notification Recipient Screen

Settings in Kaseya

1. In Kaseya, add the following fields to the ticketing system in order to show WFRM notifications.

TABLE 1-1. Kaseya ticketing fields

FIELD NAME	PURPOSE
TM_CreateTime	Event generation time
TM_ProductName	Product name
TM_AgentGUID	RM agent GUID
TM_CustomerName	Customer/Company name
TM_EventName	Event name
TM_MSAName	Exchange server name (only affects the Exchange Server Shutdown event)
TM_ServerName	CSM/WFBS server name (affect all events except Exchange Server Shutdown)

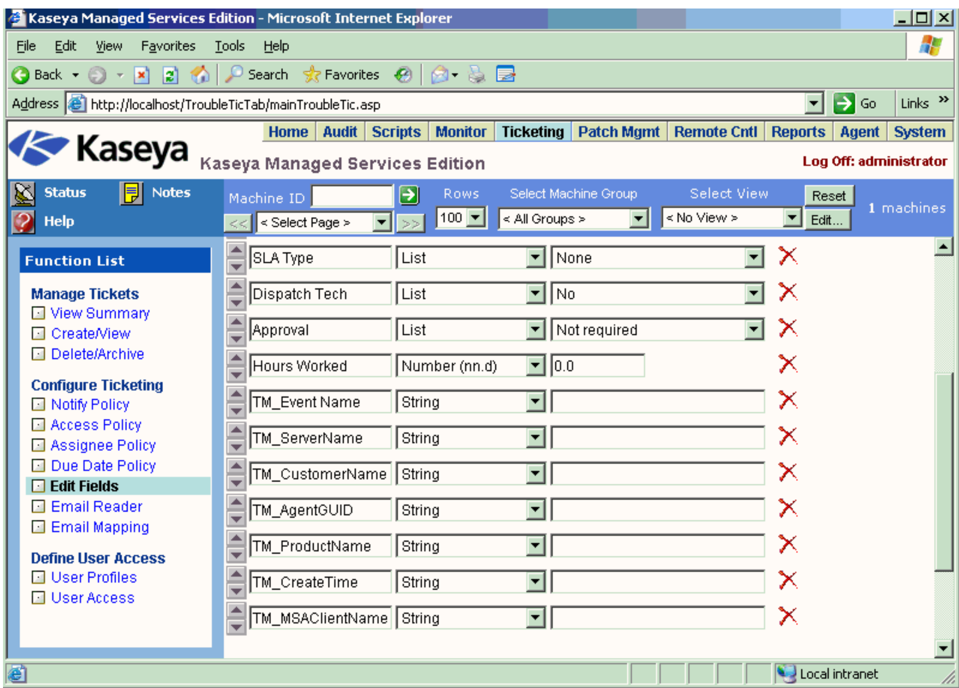

FIGURE 1-3. Kaseya Ticketing Fields

2. Ensure that the email setting is correct as on the following screen:

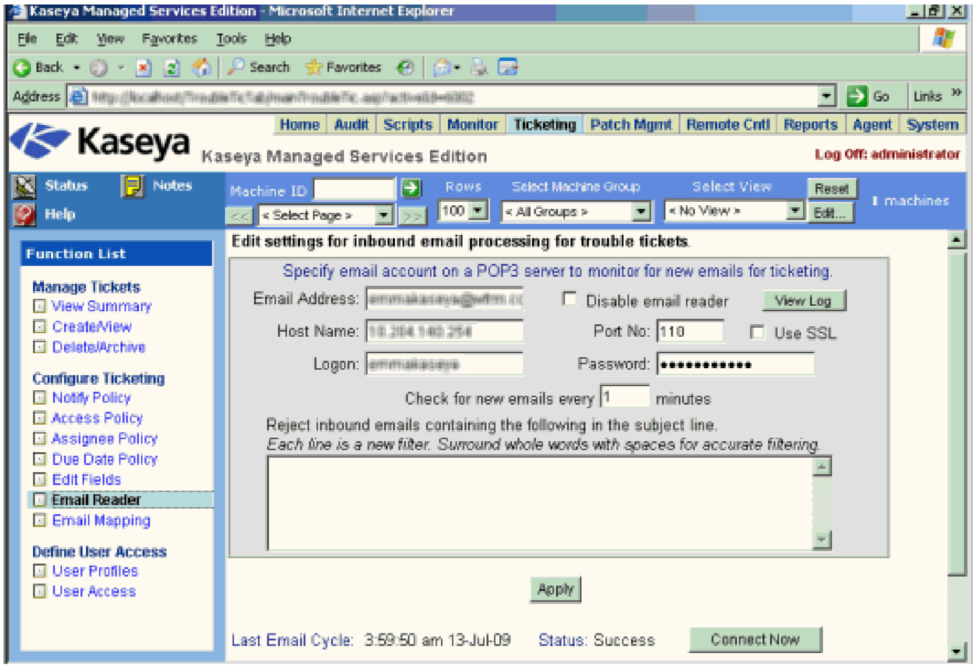

FIGURE 1-4. Kaseya Email Settings

When an event is triggered, Kaseya will receive the ticket as on the following screen:

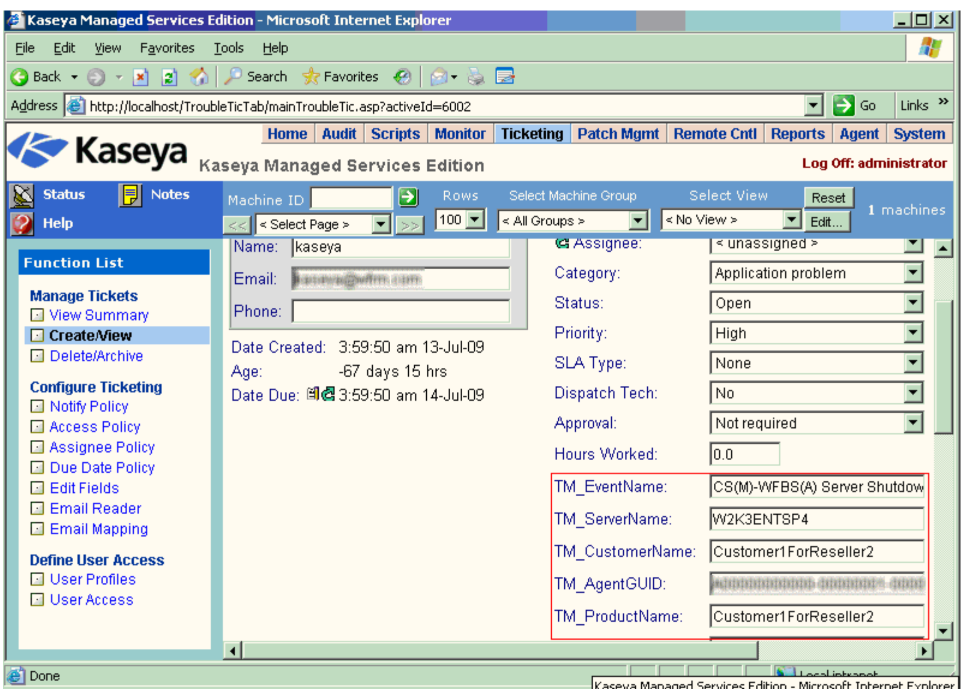

FIGURE 1-5. Kaseya Event Ticket

Integrating Autotask with WFRM

Autotask Settings in WFRM

Add Autotask authentication to the WFRM console as follows:

1. Click the **Administration > Account Information** tab.

   The Account Information tab appears.

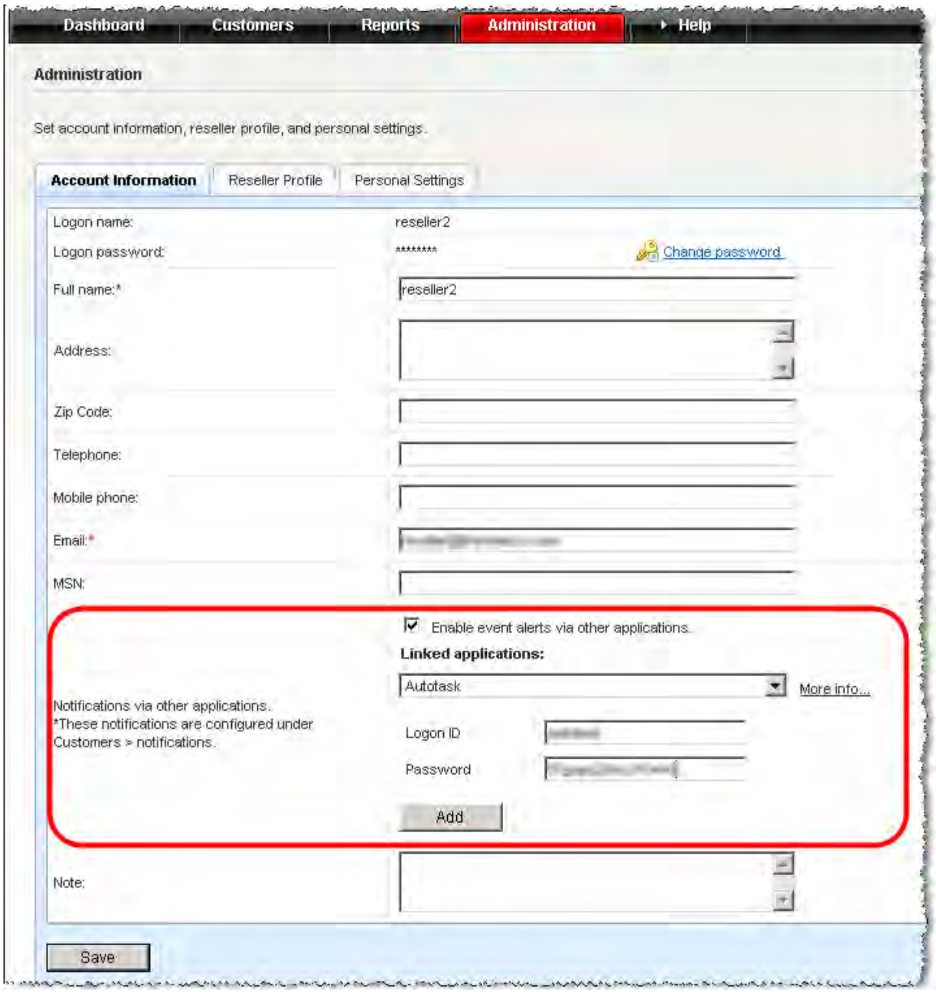

FIGURE 1-6. Account Information > Notifications via other applications

2. Click **Enable event alerts via other applications** and select `Autotask` from the **Linked applications** drop-down list.
3. Add the Autotask logon credentials and click **Add**.

Note: Find the Autotask account ID and password on the AutoTask UI (**Admin > AutotaskExtend > Tools > Add Ticket E-mail Service**).

   Autotask appears as a linked application.

4. Click **Save**.
5. Ensure that Autotask is added to the list of recipients on C**ustomers > Notification> Notification Recipient**.

6. Click **Customers > All Customers**.

   The All Customers tab appears with customer information and unique IDs.

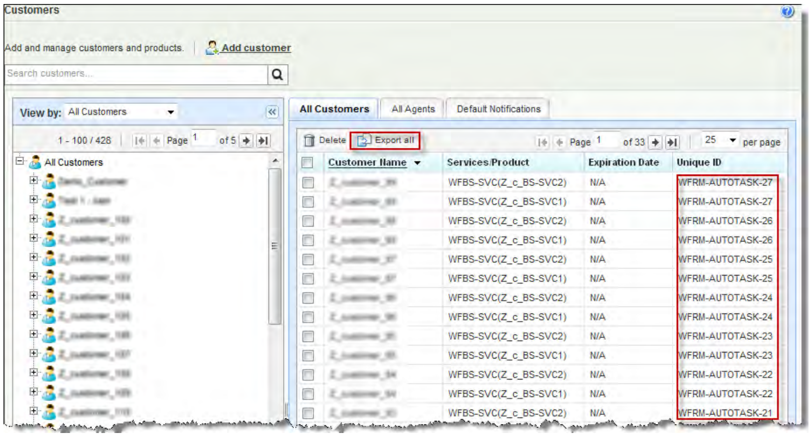

FIGURE 1-7. Customers> All Customers Tab with Unique IDs

7. Click **Export** to download the customer unique IDs.

   The File Download screen appears asking if you want to save the `Exported-Customer-UniqueID.xls` file.

8. Save the export file. You will enter the unique ID in the Autotask Trend Micro Site ID field later.

Note: If you did not select E**nable event alerts via other applications** on the **Administration > Account Information** screen, the unique ID does not display on this page.

Settings in Autotask

1. In Autotask, add the following fields to the ticketing system in order to show WFRM notifications (**Admin > Service Desk > Issue and Sub-Issue Types > Managed Services Alert**).

TABLE 1-2. Autotask ticketing fields

FIELD NAME	PURPOSE
Trend Micro Threat Events	Managed services alerts for WFRM notification. There are four default event categories.
Trend Micro System Events	
Trend Micro License Events	
Trend Micro Other Events	

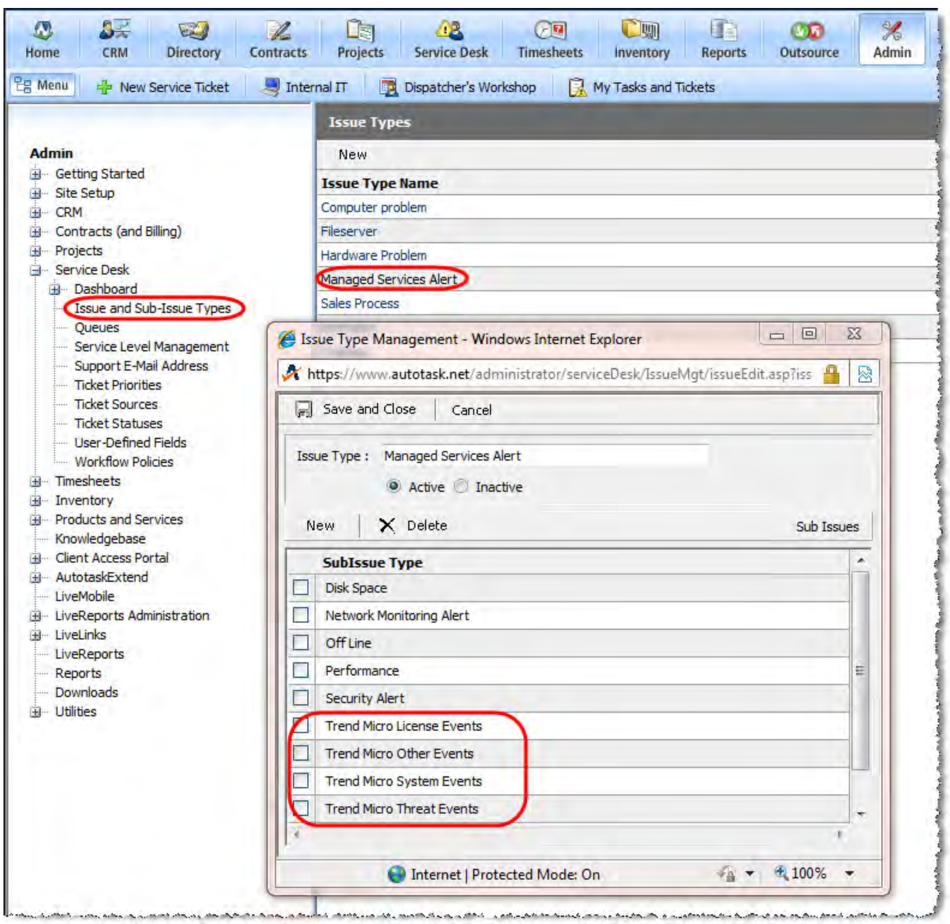

FIGURE 1-8. Trend Micro Sub-issue Types

2. Ensure that the email setting is correct as on the following screen (**Admin > AutotaskExtend > Tools > Add Ticket E-mail Service**):

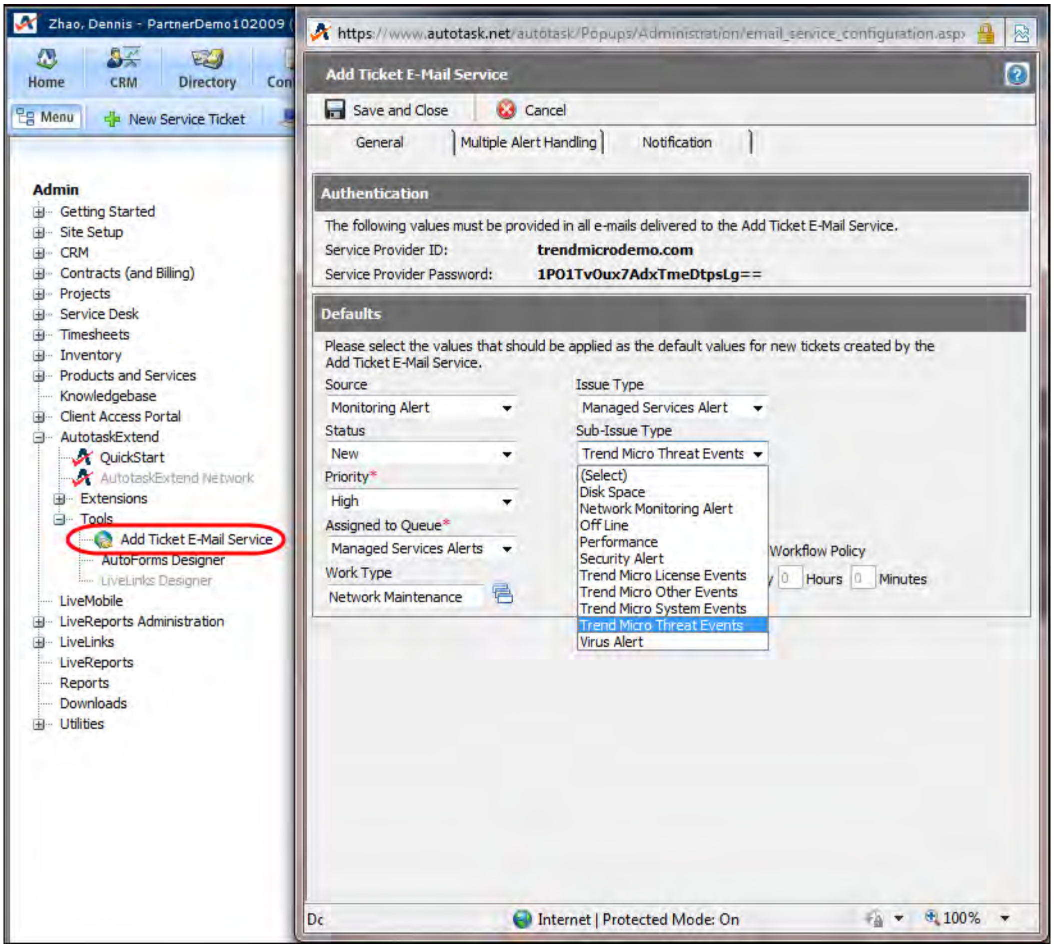

FIGURE 1-9. Ticket Email Service Settings

3. Create the Trend Micro Site ID field as on the following screen (**Admin > Site Setup > User-Defined Fields**):

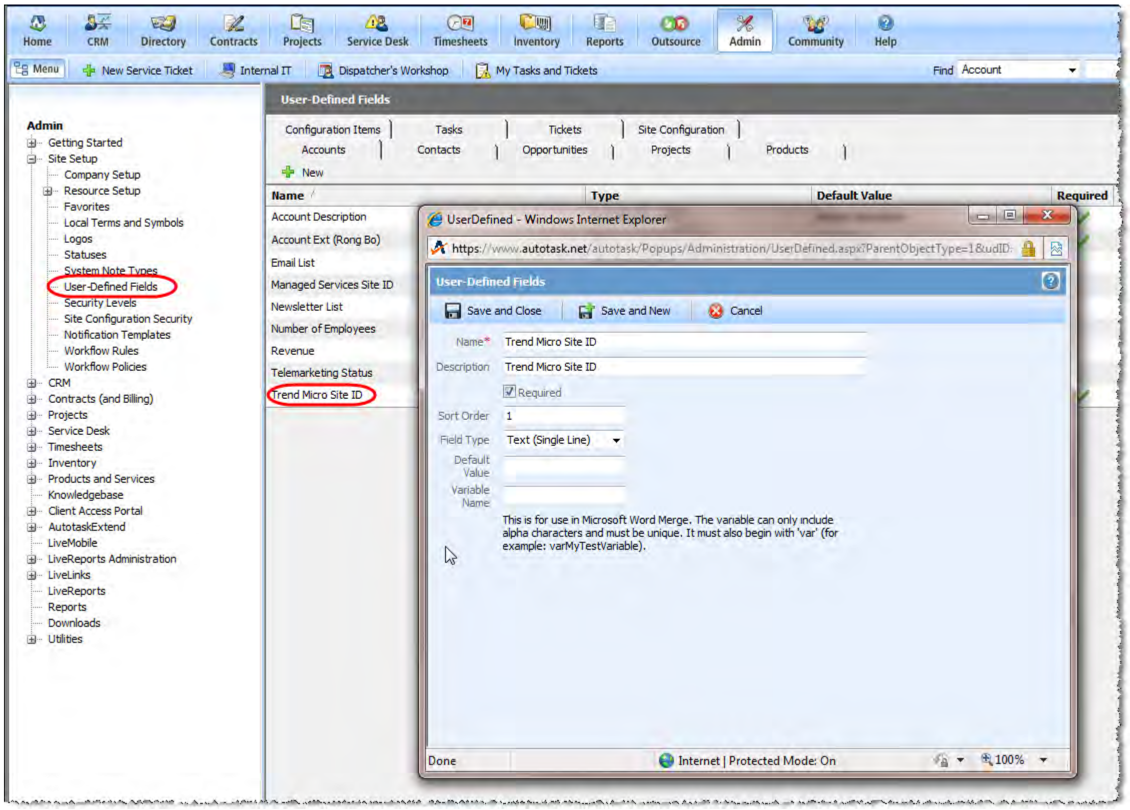

FIGURE 1-10. Trend Micro Site ID Definition

4. Input the WFRM unique ID in the new Trend Micro Site ID field as on the following screen (C**RM > Accounts > select Account > edit Account**).

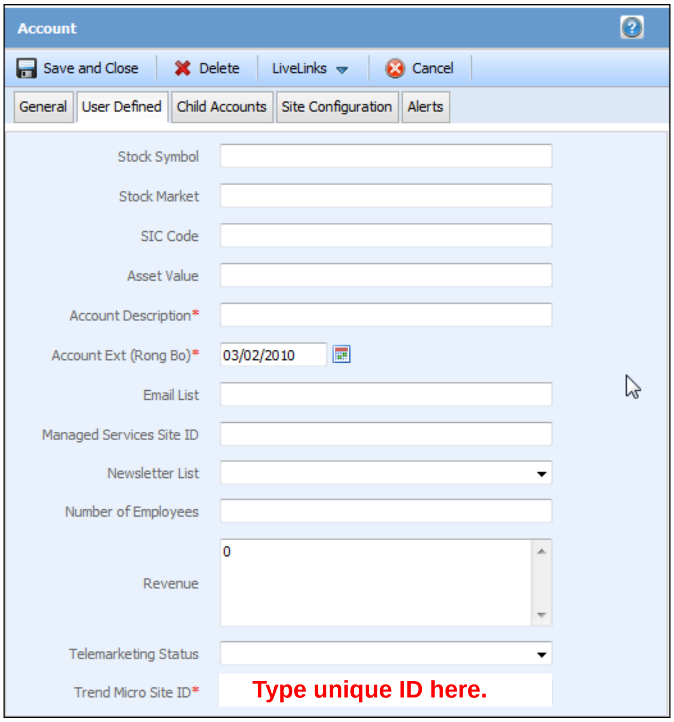

FIGURE 1-11. Account Trend Micro Site ID Field

Note: This is the unique ID exported from WFRM. See *Autotask Settings in WFRM* on page 1-11

When an event is triggered, Autotask will receive the ticket as on the following screen:

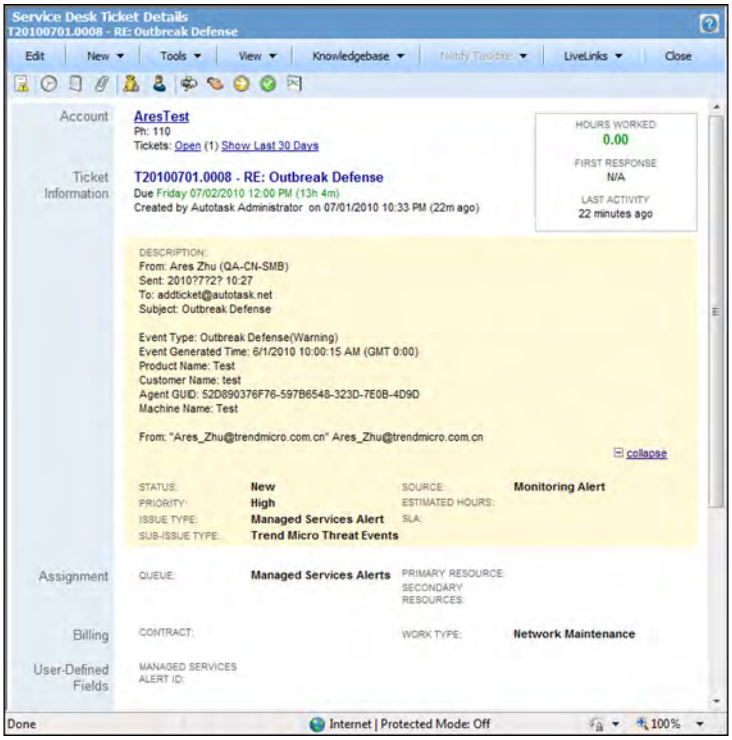

FIGURE 1-12. Autotask Ticket Details

Contacting Support

For support contact information (telephone and email address), visit the following site:

http://www.trendmicro.com/support/WFRM