

# GFI MailEssentials AI CoPilot Admin Guide





# Introduction

## Background

GFI MailEssentials AI uses rules to manage and secure email traffic within an organization. These rules allow administrators to set specific criteria for how incoming and outgoing emails are handled, addressing needs like spam filtering, content scrutiny, and attachment control. The system supports different rule types for various security and management tasks, enabling actions such as email blocking, redirection, or marking based on the rules' conditions. Administrators have the flexibility to prioritize these rules to ensure the most critical ones are applied first, improving email processing efficiency. This straightforward, rule-based approach helps prevent spam, malware, and potential data breaches, contributing to a safer email environment.

## **Overview**

GFI MailEssentials AI provides the feature to create rules to filter content based on different criteria, however, administrators must understand which rules to create based on their organization's data management needs. CoPilot assists by posing targeted questions to identify the necessary rule types for data protection. Only the necessary information for guidance is shared with the AI and is protected by Access Controls. This ensures that each organization can only access its own information.

## Purpose

GFI MailEssentials AI CoPilot transforms email security by seamlessly integrating AI-driven insights with comprehensive protection capabilities. Utilizing GenAI technology, it empowers administrators to create specific content filtering rules that align with their organization's unique requirements. This automation simplifies the intricate process of configuring security measures, ensuring a robust email defense with minimal manual oversight. CoPilot's approach not only streamlines the protection workflow but also provides adaptable security solutions that evolve according to each business's specific needs, maintaining a secure email environment with ease.

## **Benefits**

- **Customized Security Policies:** It offers administrators the ability to tailor content filtering rules specifically for their organization, providing a level of customization that ensures security measures are directly aligned with unique business needs and risks.
- Efficiency in Security Management: Automating the complex task of rule setting not only saves time but also reduces the need for extensive manual intervention. This allows IT teams to focus on other critical aspects of cybersecurity, improving overall productivity and security posture.

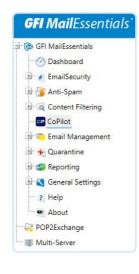
# **Getting started**

Follow the next steps to configure and use the CoPilot feature in GFI MailEssentials AI.

## Step by step guide

GFI MailEssentials AI uses rules to manage and secure email traffic within an organization. These rules allow administrators to set specific criteria for how incoming and outgoing emails are handled, addressing needs like spam filtering, content scrutiny, and attachment control. The system supports different rule types for various security and management tasks, enabling actions such as email blocking, redirection, or marking based on the rules' conditions. Administrators have the flexibility to prioritize these rules to ensure the most critical ones are applied first, improving email processing efficiency. This straightforward, rule-based approach helps prevent spam, malware, and potential data breaches, contributing to a safer email environment.

1 On the menu on the left go to the CoPilot option.



2 To start Click on "Export rules" to download your current filter rules from GFI MailEssentials AI

CP	GFI MailEssentials Co	Pilot helps with crea	ting appropriate f	lter rules.	
Follow th	ne steps below to gene	rate filter <mark>rul</mark> es with	CoPilot.		
1. Clic <mark>k</mark> "	Export <mark>rules</mark> " to downl	oad your c <mark>u</mark> rrent <mark>f</mark> ilte	er rules from GFI N	lailEssentials.	
	Export rules				
2 <mark>. U</mark> ploa	d your current <mark>rul</mark> es int	o GFI Ma <mark>il</mark> Essentials	CoPilot and proce	ed with generatin	g an updated ruleset.
3 <mark>. I</mark> mpor	t new rules generated	by CoPilot into G <mark>F</mark> I N	AailEssentials.		
Choos	e File No file chosen	6		Import rule	IS



3 Access the GFI MailEssentials AI CoPilot from the link provided.

CP	GFI MailEssentials CoPilot h	elps with creating ap	prop <mark>riate filter rul</mark> es		
Follow t	he steps below to generate fi	lter rules with CoPilot	t.		
1. Click	"Export rules" to download yo	our c <mark>u</mark> rrent <mark>f</mark> ilter rules	from GFI MailEssen	tials.	
	Export rules				
2. Uploa	ad your current rules into GFI I	MailEssentials CoPilo	t and proceed with	generating an update	ed ruleset.
3. Impo	rt new rules generated by CoF	Pilot into G <mark>FI Mail</mark> Esse	entials.		
Choos	e File No file chosen		in the second se	nport rules	

4 Sign into AppManager or Register if you don't have an account.

Ū	Software <sup>-</sup>
S	ign in to your account
Username or ema	a
Remember me	
	Sign In
	Or sign in with
G	Google
	New user? Register

- 5 If this is the first time using GFI MailEssentials AI CoPilot you need to add an instance:
  - Either directly on the pop-up or go to the upper right corner and click on the "Add instance" button.
  - Start by adding the "Instance Name".
  - Click on "Submit".

Add an instance	
Instance Name	
Instance Name	
	Submit



6 Fill out the information about your company.

Company Description ③		
	ur company does & what does it specialize in e.g., "We ar as services to the healthcare industry"	e a
Business Structure ⑦		
Select the business structure that be	est describes your company	~
Sectors ③		
Select all that apply (or type in your	rown)	~
Registered In ③	Customer Locations ③	
Enter text e.g., USA	Enter text e.g., USA, Canada	
Data Categories ③		
Select all that you posses (or type in	n your own)	~
Other Important Information ③		
Any information you want to empha	size e.g., "We want to be compliant with ISO, GDPR etc.	
Upload Existing Rules (Optional) ③		
	ß	
	Upload rules	

Field	Description
Company description	Enter a brief description of what your company does and what it specializes in. for example "We are a company that provides data analytics services to the healthcare industry".
Business structure	Select the business structure that best describes your company.
Registered In	Type in the country where your business is registered in.
Customer locations	Type the country or list of countries where your customers are located.
Data Categories	Select the categories of data that you possess or type in your own category, in case it is not found on the list.
Other important information	Add any important information you want to emphasize, for example, compliance with ISO, GDPR, HIPAA, etc.
Upload your existing rules	Here you can upload the rules you exported on Step 2 of this guide.

When you are done filling out the information click on the Submit button at the bottom.



Afterwards the CoPilot will load and it will continue asking for more information. Please note that the questions may vary depending on the information filled out on the previous step. Continue answering the questions as requested. (Image below added for reference only).

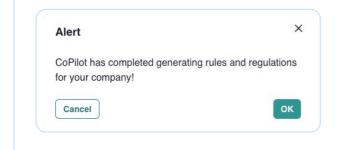
CoPilo	t	×
۲	Analysing the submitted information, kindly wait	
•	Thank you for providing the initial information. Based on the details you've provided, your organization is a legal office operating in the finance sector, registered and operating in the USA, and structured as a partnership. You've also mentioned that your data categories include personal and financial data.	
	To help us understand your data catalog better, could you please provide more details about the types of data your organization handles? For example, within the personal data category, you might handle data types such as names, addresses, phone numbers, etc. Similarly, within the financial data category, you might handle data types such as bank account details, credit card information, etc.	
	Please select the data types that apply to your organization from the following list:	
	1. Names	
	2. Addresses	
	3. Phone numbers	
	4. Email addresses	
	5. Social security numbers	
	6. Bank account details	
	7. Credit card information	
	8. Loan details	
	9. Investment details	
	10. Other (please specify)	

Once you have completed the questionnaire CoPilot will take a few minutes to generate the content filtering rules that apply to your specific organization and the data types that you are managing from your customers. (Image below added for reference only, actual questions may vary)

		1,2,3,4	
•	Thank you for your response. So, in addition to Patient Names, Contact Information, and Payment Details, your organization also handles Email Addresses, Home Addresses, Phone Numbers, and Credit Card Information. Based on the information provided, I believe we have a comprehensive understanding of your data catalog. Before we proceed, would you like to add any other data types or provide any additional information?		
		proceed	
•	Analysing applicable regulations, kindly wait		
0	Analysing sensitive data types, kindly wait		
0	Generating rule recommendations. This can take some time		

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9 When the creation is complete, you will see an alert pop-up. Click on OK to continue.



10 At this point the initial set of rules has been created. More rules can be added at any point.

iese a	re the initial set of rules based on our conversation, but you can add more by clicking the "Add a new Rule" button above.		Generated R	ules • Imported R
#	RULE NAME	түре	ENABLED	ACTION
1	⑦ ☑ CONTENT POLICY: Block Visa, MasterCard, American Express Credit Card Number Content	•		
2	⑦ E <sup>*</sup> DEA Number Rule	•		
3	⑦ ☑ Medicare Beneficiary Identifier (MBI) Card	•		
4	⑦ Ľ <sup>*</sup> U.S. Bank Account Number Rule	•		
5	⑦ Ľ <sup>8</sup> U.S. ITIN	•		
6	⑦ CONTENT POLICY: Block US Social Security Number Content			Apply edits

- **11** The next step is to Export and Apply the rules, you can do this by clicking on the button on the upper right hand corner "Export & Apply Rules". This will initiate the download of the export-rules.xml file containing the rules definition.
- 12 At this point you can navigate back to the GFI MailEssentials AI console and import the file. The message "Processing complete" will appear.

GFI	MailEssentials CoPilot helps with	n creating appropriate <mark>f</mark> il	er rules.	
ollow the step	s below to generate filter rules	with CoPilot.		
I. Click "Export	rules" to download your currer	nt <mark>filter rules from GFI M</mark>	ailEssentials.	
Export	rules			
2. Upload your	current rules into GFI MailEsser	ntials CoPilot and procee	d with generating an update	ed ruleset.
3. Import new	rules generated by CoPilot into	GFI MailEssentials.		
Choose File	export-rules.xml		Import rules	



13 To verify that the rules were imported successfully you can navigate to Content Filtering > AdvancedContent Filtering

GFI MailEssentials	Advanced Content Filtering					
<ul> <li>ImailSecurity</li> <li>ImailSecurity</li> <li>ImailSecurity</li> </ul>	Configure advanced filtering settings					
Content Filtering	Use this filter to block emails with sp string comparisons.	pecific keyword combinations th	rough the use o	f regular e	xpressic	ons or
- 🚅 Decompression Engine	Remove Selected	Enable Selected Dis	able Selected		Add R	ule
Advanced Content Filtering						
CoPilot	C Rule		Status	Priority		
🕮 🥎 Email Management	CONTENT POLICY: Block Vis Credit Card Number Conten	a, MasterCard, American Express t	Disabled	0	+	+
a Guarantine	CONTENT POLICY: Block US	Social Security Number Content	Disabled	1	+	+
In S General Settings	DEA Number Rule		Enabled	2	+	+
Help	<ul> <li>Medicare Beneficiary Identifi</li> </ul>	er (MBI) card	Enabled	3	+	+
About	U.S. Bank Account Number F	lule	Enabled	4	+	+
	U.S. ITIN		Enabled	5		

14 From here you can perform the usual actions on the rules like enable/disable/remove or adjust the priority.

## **Dashboard views**

### Regulations

On this screen you can see the list of regulations that apply to your specific organization based only on the digital data provided. If there is another regulation not taking into account already that may apply to you click on the "Add Regulation" button to have CoPilot include it. Additionally at the bottom of the list you will find the "Potential Regulations" section with an additional list of regulations that you can apply if they pertain to your location or organization.

Pregulations	Company Data & Regulations
Rules     Rules (Need	Please note that these regulations are based only on the digital data you have provided. If you have any additional information that may affect the regulations that apply to you, please click on "Add Regulation" button below.
Attention)	Applicable Regulations Add Regulation
	# REGULATION NAME
	1 O Cybersecurity for Networked Medical Devices Containing Off-the-Shelf (OTS) Software - FDA
	2 O e-CFR - Identity Theft Rules
	3 () HIPAA/HITECH
	4 O Privacy of Consumer Financial and Health Information Regulation, NAIC MDL-672, Q2 2017
	5 O Criminal Justice Information Services (CJIS) Security Policy
	6 O Connecticut General Statutes - General Provisions for state contractors who receive confidential information
	7 Ohio - Security Breach Notification
	8      Nevada Chapter 603A - Security and Privacy of Personal Information
	9 ③ New York City Administrative Code - Security Breach Notification
	10 ③ California - Education Code-EDC, Title 3, Division 14, Part 65, Chapter 2.5- Social Media Privacy
	11   New Jersey Security Breach Disclosure

Once a regulation is added CoPilot will analyze what additional rules need to be added, if required, that pertain to the specific regulation (Image below added for reference only, output can vary).

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## **Rules**

Here you will find the initial set of rules either generated by CoPilot or Imported. You are able to see the status of the rule (enabled/disabled) and take any action if needed, for example applying recommendations made by CoPilot on imported rules.

PRegulations	Rules			
<b>()</b> Rules	These are the initial set of rules based on our conversation, but you can add more by clicking the "Add a new Rule" button above.	•	Generated Rules	Imported Rules
Rules (Need Attention)	# RULE NAME	ТҮРЕ	ENABLED	ACTIONS
	1 💿 🗹 CONTENT POLICY: Block Visa, MasterCard, American Express Credit Card Number Content	•		-
	2 💿 🗹 DEA Number Rule	•		-
	3 💿 🗹 Medicare Beneficiary Identifier (MBI) Card	•		-
	4 () C U.S./U.K. Passport Number Rule	•		-
	5 ③ 🗗 U.S. ITIN	•		-
	6 ③ C CONTENT POLICY: Block US Social Security Number Content	•		O Apply edits

## **Rules (Need Attention)**

On this screen you will see a list of the rules that require additional information in order to complete the setup. Click on the "Provide Details" button and CoPilot will ask for the details that are needed.

	Bulas	that need your attention		
Rules	Please g	c that need your attention go through the rules below and provide the required information to e the setup.	Generate	d Rules • Imported Rules
Rules (Need Attention)	#	RULE NAME	ТҮРЕ	ACTIONS
	1	⑦ I Appointment Details	•	Provide Details
	2	⑦ I Patient Medical Records	•	Provide Details
	3	⑦ ☑ U.S. Drivers License Number	· · · · · · · · · · · · · · · · · · ·	Provide Details





- **Provide feedback:** You can use the Upvote or Downvote buttons to provide feedback on the GFI MailEssentials AI CoPilot.
- Update Company Details: This option can be used to add/modify information about your company that was added in the initial configuration.
- Add a new rule: After the initial assessment, this option can be used if you want CoPilot to help you generate a new rule based on another specific need you have for filtering email content.
- Upload rules: This option allows you to import new rules exported from GFI MailEssentials AI.
- Export & Apply Rules: This will initiate the download of the export-rules.xml file containing the rules definition.



- Add instance: Here you can create a new instance to run a separate analysis for another organization/company that needs to comply with a different set of regulations or for which you have a separate set of rules.
- **Start fresh:** Use this option if you want to start from scratch. Please note that confirming this option will delete all your progress and all the data on your instance.

## Data handling and processing privacy

The GFI MailEssentials AI Copilot is committed to protecting user privacy through strict data privacy measures. It processes only the data that users have explicitly supplied or predefined through configuration rules. This data is deleted after a predefined period, adhering to data minimization and privacy by design principles. Focusing solely on the necessary information for its operations, the Copilot avoids collecting or processing excess data, thus safeguarding user privacy and enhancing trust in its data handling practices.

By using GFI MailEssentials AI Copilot (limited to data submitted to CoPilot), you acknowledge that your data will be transmitted to OpenAI and Anthropic, subject to their data retention policies, but not used to train their models. Refer to the **OpenAI Privacy Policy** and **Anthropic Privacy Policy** for more details. No email data will ever be uploaded or handled by GFI MailEssentials CoPilot.

