



# Admin Guide

This document provides comprehensive administrative guidance for GFI Archiver AI, explaining how to configure AI-powered email compliance scanning, generate automated rules, and analyze organizational email archives for regulatory risks.



**GFI** Software™

# Introduction

GFI MailEssentials AI is an advanced email security solution that uses AI to help organizations manage and secure their email communications. By automatically generating and updating email filtering rules, it protects against spam, phishing, malware, and data leaks—essentially the AI features help to create organization specific rules.

## Overview



### AI-Driven Automation

GFI MailEssentials AI asks targeted questions about your organization's structure, compliance needs, and data types.



### Tailored Rule Creation

It generates precise filtering rules for both incoming and outgoing emails, including blocking, redirection, or marking messages as needed.



### Privacy by Design

Only information necessary for rule generation is shared with AI, protected by strict access controls.

## Purpose

GFI MailEssentials AI bridges the gap between complex email security requirements and practical implementation by:

- ✓ Eliminating guesswork in security rule creation.
- ✓ Accelerating deployment from weeks to minutes.
- ✓ Ensuring compliance with industry-specific regulations.
- ✓ Reducing expertise barriers for organizations of all sizes.

Whether you're protecting healthcare data under HIPAA, financial information under SOX, or personal data under GDPR, GFI MailEssentials AI ensures your email security rules align precisely with your regulatory and business requirements.

## Benefits

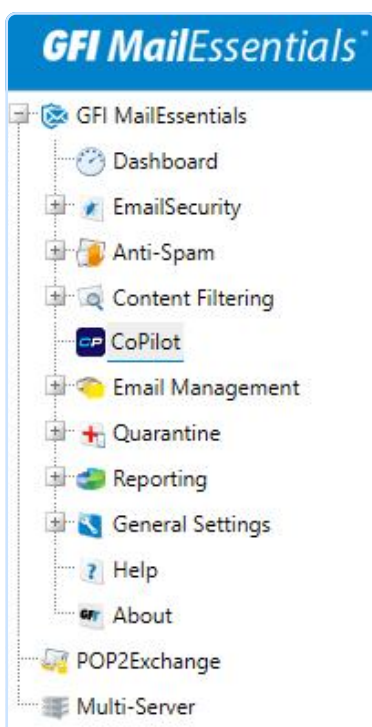
Benefits	Description
For IT Administrators	<ul style="list-style-type: none"> <li>80% faster rule deployment - Minutes instead of hours for security configuration</li> <li>Reduced false positives - AI-optimized rules minimize legitimate email blocking</li> <li>Compliance alignment - Rules created align to your regulatory requirements</li> </ul>
For Organizations	<ul style="list-style-type: none"> <li>Enhanced security posture - Comprehensive protection against evolving email threats</li> <li>Improved productivity - Clean inboxes and streamlined email workflows</li> <li>Cost optimization - Reduced IT overhead and faster time-to-protection</li> </ul>
For Compliance	<ul style="list-style-type: none"> <li>Automated regulatory mapping - Built-in knowledge of GDPR, HIPAA, SOX, and other regulations</li> <li>Audit-ready documentation - Complete rule justification and compliance tracking</li> <li>Risk reduction - Proactive data loss prevention aligned with industry standards</li> </ul>

## Getting started

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


### Step by step guide

1. On the menu on the left go to AI option:



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

CoPilot

 GFI MailEssentials CoPilot helps with creating appropriate filter rules.

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Follow the steps below to generate filter rules with CoPilot.

1. Click "Export rules" to download your current filter rules from GFI MailEssentials.

Export rules

2. Upload your current rules into GFI MailEssentials CoPilot and proceed with generating an updated ruleset.
3. Import new rules generated by CoPilot into GFI MailEssentials.

Choose File


No file chosen

Import rules

Note: You can view and manage imported rules in the 'Advanced Content Filtering' section under 'Content Filtering'.

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

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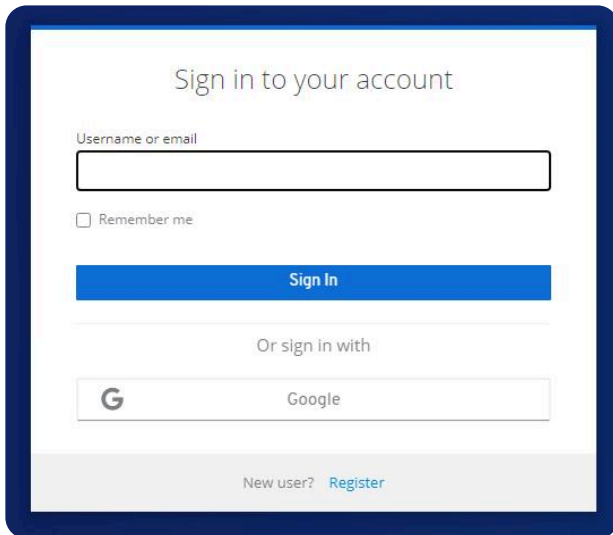
Choose File

No file chosen

Import rules

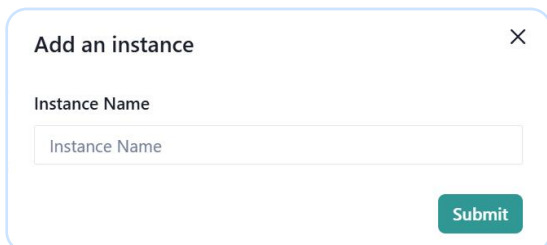
Note: You can view and manage imported rules in the 'Advanced Content Filtering' section under 'Content Filtering'.

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

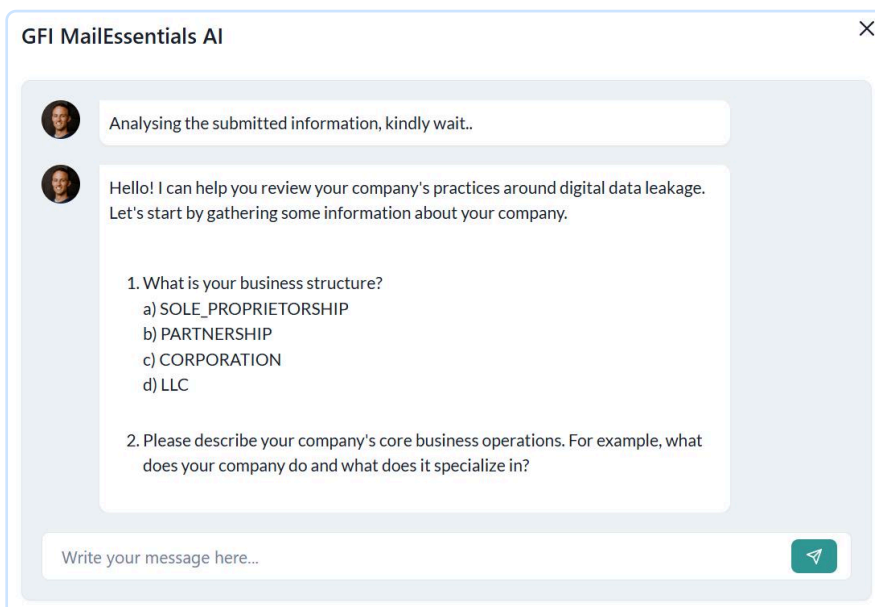
A screenshot of a web form titled "Sign in to your account". It features a text input field for "Username or email", a "Remember me" checkbox, a blue "Sign In" button, and a "Or sign in with" section containing a Google logo and a "Google" button. At the bottom, it says "New user? Register" with a link.

5. If this is the first time using GFI MailEssentials AI you will 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
- In Windows, select GFI Archiver and Register Appliance.

A screenshot of a "Add an instance" pop-up window. It has a close button (X) in the top right corner. Inside, there is a label "Instance Name" above a text input field containing the placeholder "Instance Name". A green "Submit" button is located at the bottom right.

6. Fill out the information about your company.

A screenshot of the "GFI MailEssentials AI" chat interface. The window title is "GFI MailEssentials AI" with a close button (X). The chat area shows a system message: "Analysing the submitted information, kindly wait..". Below it, a GFI AI avatar says: "Hello! I can help you review your company's practices around digital data leakage. Let's start by gathering some information about your company." The chat contains two numbered questions: "1. What is your business structure?" with options a) SOLE\_PROPRIETORSHIP, b) PARTNERSHIP, c) CORPORATION, and d) LLC; and "2. Please describe your company's core business operations. For example, what does your company do and what does it specialize in?". At the bottom is a text input field with the placeholder "Write your message here..." and a green send button with a paper plane icon.

Field	Description
Company description	We are a company that specializes in providing innovative cybersecurity solutions to businesses across various industries.
Business structure	Our business operates as a limited liability company (LLC), allowing us to offer flexible services while protecting our assets.
Registered In	We are registered in the United States, where we conduct all our business operations.
Customer locations	Our customers are primarily located in North America and Europe, ensuring a broad market reach.
Data Categories	We handle sensitive data including personal identification information, financial records, and health data.
Other important information	We prioritize compliance with industry standards such as ISO 27001 and GDPR to ensure data protection and privacy.

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

7. This triggers the AI processing after which you will be shown your company details, and allowed to update any missing or wrong information.

Company details

What is your company about?

Update Company Details

Delete Instance

Company logo

Help your team recognize your brand by uploading your logo.

Upload Logo

Company name

GFI MailEssentials

Company Description ⓘ

A medium-sized healthcare insurance firm specializing in healthcare insurance.

Business Structure ⓘ

PARTNERSHIP

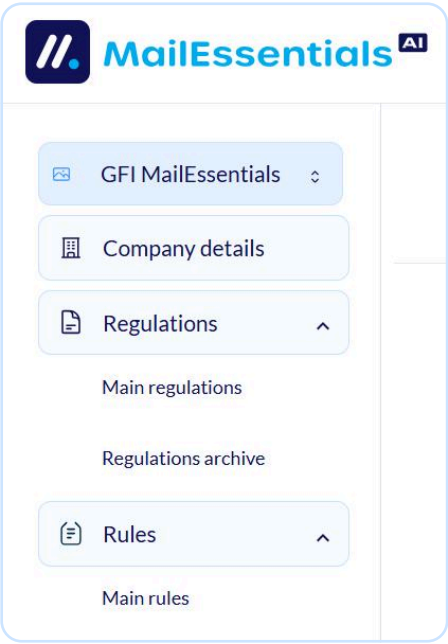
8. Scrolling to the bottom of this screen allows you to upload your existing rules.

Existing rules (optional) ⓘ

Drag and drop, or [choose file](#) to upload.



- When the creation is complete, and you click on the side button under Regulations - Main Regulations.



- The above action reveals applicable regulations to your organization, and potential regulations, and buttons to allow you to generate rules.

### Regulations

The company is primarily subject to EU regulations due to its operations in the UK and EU. Directive 2013/40/EU is applicable as it addresses digital data security within the EU. Other regulations like the Luxembourg Act and Czech Cyber Security Act may be relevant if the company expands operations to those specific countries. The Austrian Telecommunications Act is not applicable as there are no operations in Austria.

Regenerate Rules

Regenerate Rules Fresh

Add custom regulation

#	Regulation name	Type	Country	Country group	Applied
1	<div> <div></div> <div>EU GDPR (General Data Protection Regulation)</div> </div>	Applicable	European Union	Europe	<div> <div></div> <div>Yes</div> <div></div> </div>
2	<div> <div></div> <div>EU - ePrivacy Directive 2002 58 EC</div> </div>	Applicable	European Union	Europe	<div> <div></div> <div>Yes</div> <div></div> </div>
3	<div> <div></div> <div>EudraLex - The Rules Governing Medicinal Products in the European Union</div> </div>	Applicable	European Union	Europe	<div> <div></div> <div>Yes</div> <div></div> </div>

- You can choose applicable regulations by toggling the button under "Applied" by default it is set to "Yes".
- You can add "Add Custom regulations".
- You can Regenerate Rules.

11. Click on Main Rules to reveal the rules that have been created:

Rules

These are the initial set of rules based on our conversation, but you can add more by clicking the 'Add custom rule' button below.

Search rules...

Upload ruleAdd custom rule

#	Rule name	Importance	Type	Direction	Applied
1	Austria Identity Card	High	Generated	Direction	<div><div></div>Yes</div>
2	Austria Passport Number	High	Generated	Direction	<div><div></div>Yes</div>
3	Austria Social Security Number	High	Generated	Direction	<div><div></div>Yes</div>
4	Belgium National Number Rule	High	Generated	Direction	<div><div></div>Yes</div>
5	Credit Card Number Detection Rule	High	Generated	Direction	<div><div></div>Yes</div>
6	Croatia Personal Identification (OIB) Number	High	Generated	Direction	<div><div></div>Yes</div>
7	Cyprus Passport Number	High	Generated	Direction	<div><div></div>Yes</div>
8	Cyprus Tax Identification Number	High	Generated	Direction	<div><div></div>Yes</div>

- You can choose rules you want applicable by toggling the button under "Applied" by default it is set to "Yes".
- You are able to "Add custom rule".
- Upload and Export Rules.

12. To export the rules as an XML file for use within the GFI MailEssentials console click Export rules.

GM

GFI MailEssentials

VALID

A medium-sized healthcare insurance firm specializing in healthcare insurance.

Update info

Export rules

6 Applicable regulations

16 Potential regulations

66 Generated rules

Rules downloaded on: Never

Last regulation discovery: 6/19/2025

Rules

These are the initial set of rules based on our conversation, but you can add more by clicking the 'Add custom rule' button below.

Search rules...


All Rules

Upload ruleUpload emailRenew RulesAdd custom rule



13. Navigate back to the GFI MailEssentials AI console and import the Xml file. The message "Processing complete" will appear once done.

CoPilot



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Import rules


Note: You can view and manage imported rules in the 'Advanced Content Filtering' section under 'Content Filtering'.

14. To verify that the rules were imported successfully you can navigate to Content Filtering > Advanced Content Filtering.

GFI MailEssentials

- Dashboard
- EmailSecurity
- Anti-Spam
- Content Filtering
  - Keyword Filtering
  - Attachment Filtering
  - Decompression Engine
  - Advanced Content Filtering
- CoPilot
- Email Management
- Quarantine
- Reporting
- General Settings
- Help
- About
- POP2Exchange
- Multi-Server

Advanced Content Filtering



Configure advanced filtering settings

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Use this filter to block emails with specific keyword combinations through the use of regular expressions or string comparisons.

Remove Selected

Enable Selected

Disable Selected

Add Rule...

<input type="checkbox"/>	Rule	Status	Priority		
<input type="checkbox"/>	CONTENT POLICY: Block Visa, MasterCard, American Express Credit Card Number Content	Disabled	0	↑	↓
<input type="checkbox"/>	CONTENT POLICY: Block US Social Security Number Content	Disabled	1	↑	↓
<input type="checkbox"/>	DEA Number Rule	Enabled	2	↑	↓
<input type="checkbox"/>	Medicare Beneficiary Identifier (MBI) card	Enabled	3	↑	↓
<input type="checkbox"/>	U.S. Bank Account Number Rule	Enabled	4	↑	↓
<input type="checkbox"/>	U.S. ITIN	Enabled	5	↑	↓

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

## Data Handling and Processing Privacy

The GFI MailEssentials AI 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 AI avoids collecting or processing excess data, thus safeguarding user privacy and enhancing trust in its data handling practices.

By using GFI MailEssentials AI 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.

**Important:** No email data will ever be uploaded or handled by GFI MailEssentials AI.