

GFI GUIDE

GFI MailEssentials AI CoPilot *Admin Guide*



GFI Software™

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.

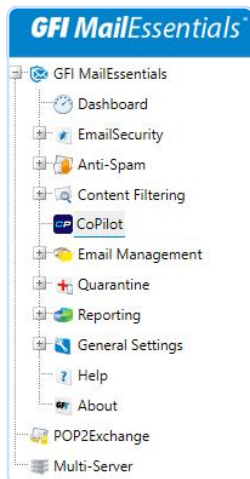
Getting started

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

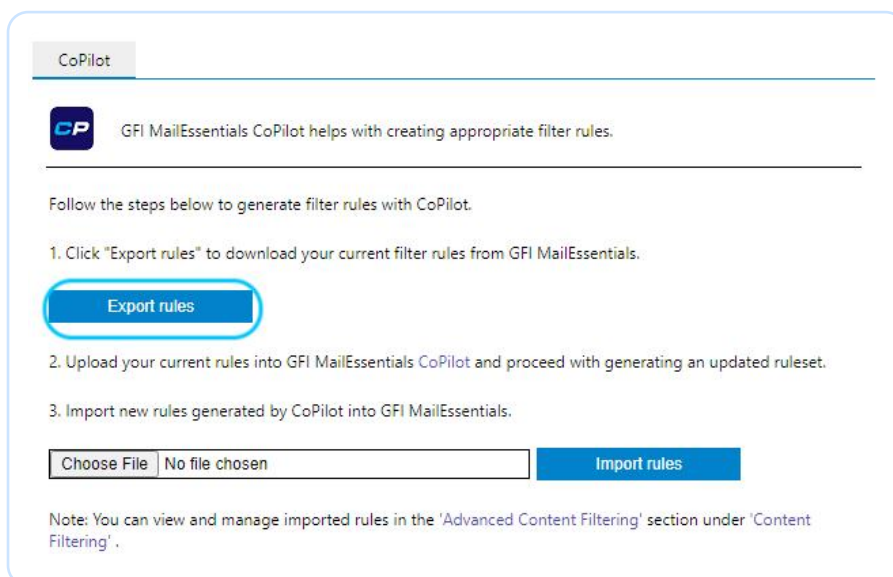
Step by step guide

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



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

CoPilot

 GFI MailEssentials CoPilot helps with creating appropriate filter rules.

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.

[Import rules](#)

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

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

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Sign in to your account

Username or email

Remember me

[Sign In](#)

Or sign in with



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

[Submit](#)

6 Fill out the information about your company.

What is your company about?

Company Description ⓘ

Enter a brief description of what your company does & what does it specialize in e.g., "We are a company that provides data analytics services to the healthcare industry"

Business Structure ⓘ

Select the business structure that best describes your company

Sectors ⓘ

Select all that apply (or type in your own)

Registered In ⓘ

Enter text e.g., USA

Customer Locations ⓘ

Enter text e.g., USA, Canada


Data Categories ⓘ

Select all that you possess (or type in your own)

Other Important Information ⓘ

Any information you want to emphasize e.g., "We want to be compliant with ISO, GDPR etc."

Upload Existing Rules (Optional) ⓘ



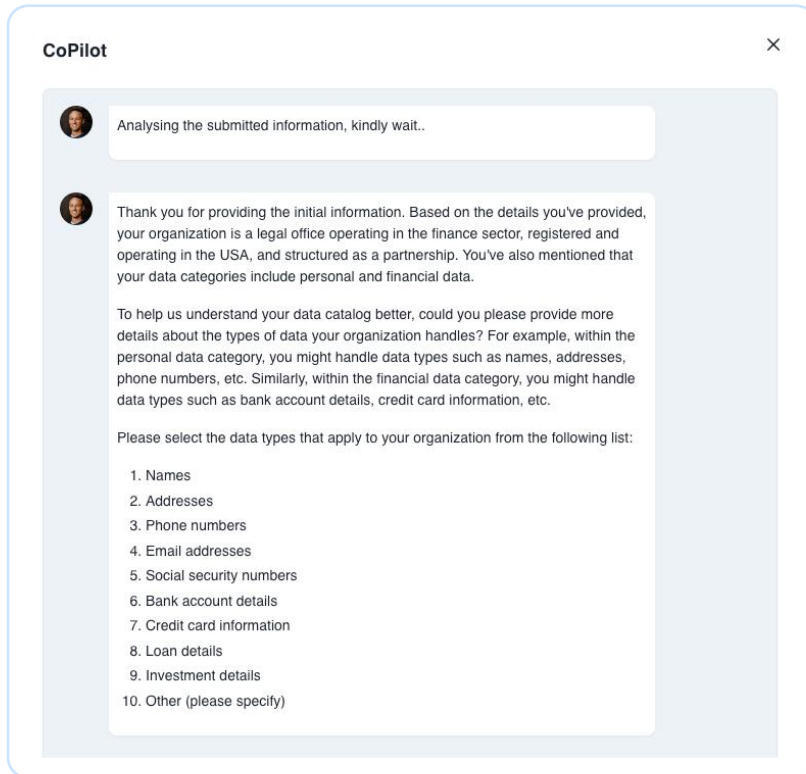
Upload rules

[Submit](#)

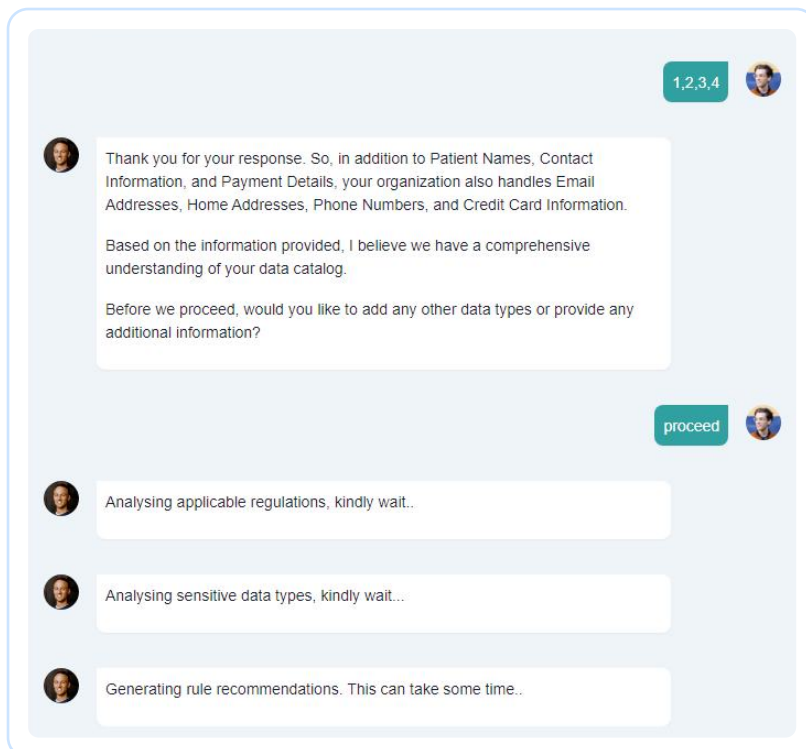
Field	Description
Company description	Enter a brief description of what your company does and what it specializes in. for example "We are a company that provides data analytics services to the healthcare industry".
Business structure	Select the business structure that best describes your company.
Registered 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.

- 7 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).



- 8 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)



- 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.

Rules ● Generated Rules ● Imported 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.

#	RULE NAME	TYPE	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	🔗 U.S. Bank Account Number Rule	●	🔘	-
5	🔗 U.S. ITIN	●	🔘	-
6	🔗 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.

CoPilot

CP GFI MailEssentials CoPilot helps with creating appropriate filter rules.

Follow the steps below to generate filter rules with CoPilot.

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

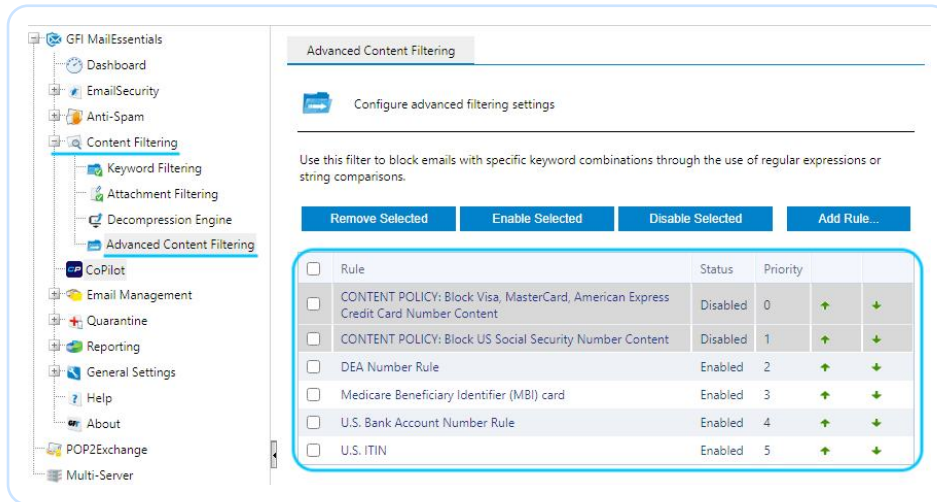
Export rules

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 export-rules.xml **Import rules**

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

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

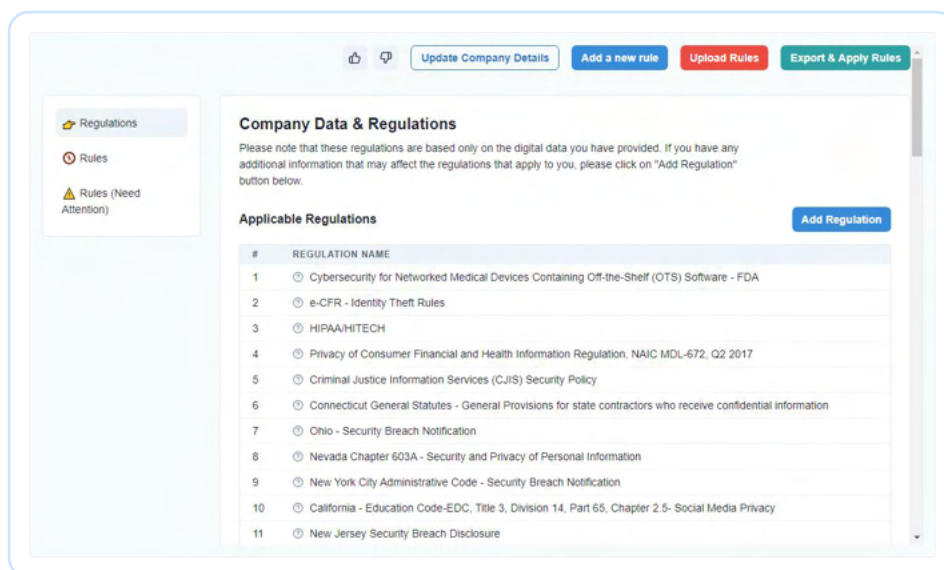


- 14 From here you can perform the usual actions on the rules like enable/disable/remove or adjust the priority.

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.



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).

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.

The screenshot shows the 'Rules' management page. At the top, there are navigation buttons: 'Update Company Details', 'Add a new rule', 'Upload Rules', and 'Export & Apply Rules'. On the left, a sidebar contains 'Regulations', 'Rules', and 'Rules (Need Attention)'. The main content area is titled 'Rules' and includes a legend for 'Generated Rules' (orange dot) and 'Imported Rules' (blue dot). Below the legend is a table with the following data:

#	RULE NAME	TYPE	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	🔗 U.S./U.K. Passport Number Rule	●	🔴	-
5	🔗 U.S. ITIN	●	🔴	-
6	🔗 CONTENT POLICY: Block US Social Security Number Content	●	🔴	🔗 Apply edits

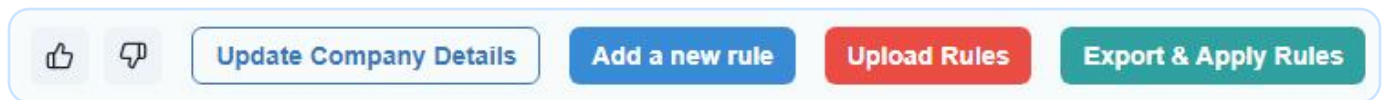
Rules (Need Attention)

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.

The screenshot shows the 'Rules that need your attention' page. It features the same navigation and sidebar as the previous screenshot. The main content area is titled 'Rules that need your attention' and includes a legend for 'Generated Rules' (orange dot) and 'Imported Rules' (blue dot). Below the legend is a table with the following data:

#	RULE NAME	TYPE	ACTIONS
1	🔗 Appointment Details	●	Provide Details
2	🔗 Patient Medical Records	●	Provide Details
3	🔗 U.S. Drivers License Number	●	Provide Details

Other actions



- **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.