McAfee ePolicy Orchestrator (McAfee ePO)
McAfee Security Quickstart Scope Definition Guidelines

McAfee® ePolicy Orchestrator® (McAfee ePO™) is a key component of the McAfee Security Management Platform and the only enterprise-class software to provide unified management of endpoint, network, and data security. With end-to-end visibility and powerful automations that slash incident response times, McAfee ePO software dramatically strengthens protection and drives down the cost and complexity of managing risk and security. Get the appropriate service type below to ensure it is implemented and configured fast, cost-effectively, and securely.

New Installation: 1 X MD-QS-SMB-4HR*
A McAfee Subject Matter Expert (SME) will remotely set up and configure your new McAfee ePO server based on McAfee best practices.
• Review server and software requirements
• Install McAfee ePO and applicable patches
• Check-in applicable extensions
• Configure base features:
  – Master repository schedule
  – Email server configuration
  – User accounts (up to five)*
  – Distributed repositories (up to two)*
  – Agent handlers (up to one)*
  – Active Directory (AD) integration for system tree population (up to one AD server)*
  – Custom dashboards (up to one)*
  – Client update task (up to two)*
• Configure base McAfee agent policy settings:
  – Super agents (up to two)*
  – ASCII and policy enforcement intervals
  – Custom repository lists (up to two)*
• Deploy the McAfee agent to endpoints (up to 25)*
• Deploy rogue system detection (RSD) sensor (up to one)*

Upgrading: 1 X MD-QS-SMB-4HR*
The McAfee SME will perform the following tasks:
• Review server and software requirements
• Backup the existing McAfee ePO server and database
• Install new version of McAfee ePO and applicable patches
• Validate all migrated policies and settings
• Verify base features configurations:
  – Distributed repositories (up to two)*
  – Agent handlers (up to one)*
  – AD integration for system tree population (up to one AD server)*
  – Custom dashboards (up to one)*
• Confirm RSD sensor (up to one)* operations
• Demonstrate McAfee VirusScan® Enterprise reports using McAfee ePO queries

Optimization: 1 X MD-QS-SMB-4HR*
The McAfee SME will perform the following tasks:
• Configure base features:
  – Master repository schedule
  – Email server configuration
  – User accounts and permissions
  – Distributed repositories
  – Agent handlers
  – AD integration for system tree population
  – Custom dashboards
  – Client update task
  – Custom queries
• Create tasks within ePO:
  – Server tasks
  – Client tasks
• Deploy the McAfee agent to endpoints
  – Installation
  – Deployment
• Policy creation and policy assignment
• Logical organization of the system tree

Knowledge Transfer: 1 X MD-QS-SMB-4HR*
The McAfee SME will perform the following tasks:
• Explain how the McAfee ePO user interface functions
• Explain base features
  – Master repository
  – User accounts and permissions
  – Distributed repositories
  – Agent handlers
  – AD integration for system tree population
  – Custom dashboards and custom queries
• Explain server tasks
  – Update master repository
  – Replication task
  – AD sync
  – Explain client tasks
  – Deployment tasks
  – Daily .DAT and engine updates
• Explain the McAfee agent
  – Installation
  – Deployment
• Explain policy creation and policy assignment
• Troubleshooting techniques
## Session Prerequisites—Client Responsibilities

- Customer provides server that meets McAfee recommended hardware requirements to host McAfee ePO and SQL Express; if total endpoint count is less than 1,000. (The SQL Express version that ships with McAfee ePO has a database size limit of 4.0 GB. If expected database size is larger than 4.0 GB, a separate SQL server will be required.)
- Customer provides server that meets McAfee recommended hardware requirements to host an agent handler (if applicable)
- If endpoint count is greater than 1,000, customer must provide a separate server to host McAfee ePO supported version of SQL
- Customer is required to provide any versions of SQL not included with McAfee ePO if needed (non-express versions)
- If a network-based SQL server is being used, customer must provide administrative-level access to the server
- Domain account with local administrative rights to each system to deploy the McAfee agent from McAfee ePO
- To deploy the McAfee agent from McAfee ePO, all target endpoints must have any local firewalls disabled or configured to allow Microsoft Windows file sharing access enabled from the McAfee ePO server
- If super agent distributed repositories are to be utilized, customer must identify the endpoints to be used
- If non-super agent distributed repositories are to be utilized (FTP, HTTP, UNC), customer is responsible for configuring and provisioning these servers
- Customer must use their McAfee grant number to download all required McAfee software. Having the McAfee SME do this at the start of a session might prevent all scope items from being delivered.
- Upgrading—if customer is upgrading from McAfee ePO 3.x, the SQL server hosting the McAfee ePO database must meet the newest McAfee ePO SQL version requirements. If an upgrade is needed, customer is responsible for performing this upgrade or it can be done by the McAfee SME; additional sessions will have to be purchased.
- Perform necessary backups
- Indicate if there are any outstanding service requests/trouble tickets opened with McAfee Technical Support

*Configurations and deployments exceeding these numbers will require additional sessions. Each remote session lasts up to four hours.

For more information about McAfee® Security Quickstart, email quickstart_support@mcafee.com, or visit www.mcafeequickstart.com.