

The logo for Mobile Filter, featuring a red swoosh above the text "Mobile Filter" in white.

# Mobile Filter

Version 5.0

## SurfControl Mobile Filter *Service Pack 2 Installation Guide*

Enterprise Threat Protection™

# NOTICES

---

Updates to the SurfControl documentation and software, as well as Support information are available at [www.SurfControl.com/support](http://www.SurfControl.com/support).

Copyright ©1998-2006 SurfControl plc. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior permission of the copyright owner.

SurfControl is a registered trademark and SurfControl and the SurfControl logo are trademarks of SurfControl plc. All other trademarks are property of their respective owners.

Version 5, printed December 2005.

# CONTENTS

---

Notices .....	i
Introduction .....	4
Upgrading the Server.....	5
Installing Mobile Filter Service Pack 2 .....	5
The Mobile Filter client.....	7
Upgrade each client individually .....	7
Using a Group Policy to silently upgrade or install clients .....	7
Using a Network Upgrade for clients .....	10
Installing new clients .....	11



# INTRODUCTION

---

This guide describes how to install SurfControl Mobile Filter Service Pack 2. It also explains how to install/upgrade clients to this service pack. Service Pack 2 enhances SurfControl Mobile Filter to give you:

- Secure LDAP communication between Mobile Filter and the domain controller.
- The ability to configure the port between the client and Mobile Filter server.
- Network installation of clients via group policy.
- The ability to make the client invisible to the user.
- Secure communication between the client and the server.
- Increased client deployment security.

# UPGRADING THE SERVER

Before you start to install Mobile Filter SP2 make sure that:

- SurfControl Mobile Filter server version 5.0.1 is already installed on the server on which you intend to install Mobile Filter SP2.
- All Mobile Filter servers are disconnected from the Mobile Filter database. This is to enable the database to be upgraded.

## INSTALLING MOBILE FILTER SERVICE PACK 2

### Procedure 1 Installing the service pack

Step	Action
1	Locate the Service Pack 2 executable file (setup.exe).
2	Double-click setup.exe to start the installation process.
<b>Wizard Starts</b>	
3	Navigate through the wizard clicking <b>Next</b> until you see the <b>Server Pass Phrase Configuration</b> screen.
<b>Enter the Pass-phrase</b>	
4	<p>In the Server Pass Phrase Configuration screen enter a Pass-Phrase and confirm it. You can change it at any time within the Mobile Administrator.</p> <p>In the event of a database failure and a new one having to be created, the pass-phrase enables the client to identify itself to the Mobile Filter server. The server can then accept the client and write its details to the new database without the client having to be reinstalled.</p> <p>For more information see 'Set Server Pass-phrase' in the Administrator Menus section of the Mobile Filter Administrator's Guide.</p>
	<div data-bbox="316 1304 922 1759" data-label="Image"> </div> <div data-bbox="979 1289 1406 1598" data-label="Caption"> <p><b>Figure 1</b> Server Pass-Phrase Configuration</p> <ul style="list-style-type: none"> <li>• <b>Enter Pass-Phrase</b> - Enter a pass-phrase.</li> <li>• <b>Confirm Pass-Phrase</b> - Re-enter the pass-phrase.</li> </ul> <p><b>Note:</b> <i>The Pass-phrase MUST be between 8 - 16 characters long.</i></p> </div>
5	Click <b>Next&gt;</b> to continue.

(Sheet 1 of 2)

Step	Action
<b>Set security</b>	
6	<p>This dialog enables you to use a secure SSL connection to your Active Directory server.</p> <p>To change this setting after upgrading, edit the <code>SecureConnection</code> registry setting. See 'Changing the security of Mobile Filter' in the Miscellaneous Tasks section of the Administrator's Guide.</p>
7	<div data-bbox="316 527 922 982" style="border: 1px solid gray; padding: 5px;"> </div> <div data-bbox="979 512 1406 810" style="margin-left: 20px;"> <p><b>Figure 2</b> Secure Active Directory Connection Configuration</p> <ul style="list-style-type: none"> <li>• <b>Non - Secure Connection</b> - To use a standard LDAP port to contact the Active Directory server.</li> <li>• <b>Secure Connection</b> - To use a secure SSL connection. This will be slower than an unsecure connection.</li> </ul> </div>
8	Click <b>Next&gt;</b> to Continue.
9	Click <b>Next&gt;</b> in the Ready to install screen to start the install.
<b>Finish</b>	
10	In the InstallShield Wizard Complete screen, click <b>Finish</b> .
(Sheet 2 of 2)	

## THE MOBILE FILTER CLIENT

---

When you have installed the Service Pack, SurfControl recommends that you upgrade all of your existing clients to enable them to make use of the new functionality that has been introduced. If you choose not to upgrade your clients, they will continue to function correctly, but the visibility setting will be disabled and the pass-phrase functionality will be unavailable. New clients will automatically pick up these benefits when they are installed. There are three ways to upgrade or install clients:

- Upgrade or install each client individually.
- Use a group policy to silently upgrade or install clients the next time the devices boot up.
- Upgrade or install clients via a network upgrade.

### UPGRADE EACH CLIENT INDIVIDUALLY

If you do not have the mechanism for rolling out updates automatically you will need to upgrade each client individually. You can also inform users of available updates so that they can uninstall the client themselves. This installation can be started from a web page or by directing users to a directory containing the upgrade executable files. For direct installation, or for installing via a web page the upgrade interface is the same:

#### Procedure 2 Client upgrade

Step	Action
1	When the upgrade, starts the user will see the Welcome screen followed by the License Agreement.
2	Once they have accepted the license and clicked <b>Next</b> a Ready to install screen will show a status bar indicating how the upgrade is progressing. No dialogs that require any input from the user will be seen.
3	Once the <b>Finish</b> screen appears the user will need to reboot their device to finish the upgrade.

### USING A GROUP POLICY TO SILENTLY UPGRADE OR INSTALL CLIENTS

You can now upgrade or install the clients of SurfControl Mobile Filter remotely without the user's interaction via Active Directory and Group Policy. After the administrator deploys the software, it is available for installation the next time the client computer reboots. To configure group policies you must have a domain running Active Directory. Any computers that you intend to manage must be members of this domain, and be seen within Active Directory Users and Computers. To use Remote Install you need to:

- Create an MST file.
- Create a group policy.

The following instructions assume that you are familiar with Active Directory and using the Microsoft Group Policy Manager to apply policies to machines or groups of machines.

## Before you start

To install clients onto Windows XP you need to apply a policy setting that turns off fast network startup. If you don't do this each client will need to re-boot twice before software installation policy changes will be applied to it. To turn off Fast Logon Optimization, you can enable the following policy setting:

**Computer Configuration\Administrative Templates\System\Logon\ Always wait for the network at computer startup and logon.**

For more information on the issues of Fast Logon Optimization see the Microsoft KB article:<http://support.microsoft.com/kb/q305293/>

## Step 1 - Create an MST file

Before you can configure a group policy software installation, it is necessary to create an .mst file that contains the configuration options relevant to your environment. The minimum amount of information required within the .mst file for a client installation are the name (or IP address) of the Mobile filter server and the un-installation password. If required, the following items can also be entered:

- **Client description** - this will be the same for each client installed using the group policy
- **Port** - The port over which communication between the client and the server can be specified. IIS must be configured to support communication over the selected port
- **Secure communications** - You can choose to have secure (https) communication between the client and the server. IIS must have a certificate installed to allow SSL and the clients must all trust the issuing certificate authority.

### Procedure 3 Creating an MST file

Step	Action
1	Place the Mobile Filter Client install files in a directory that is shared with all computers in Active Directory. This folder must allow read access for all domain computers.
2	Navigate to the Tools directory of your Mobile Filter server and locate the <code>scgenmst.vbs</code> file.
3	<p>Copy and run this script from the Active Directory server where you are hosting the mobile filter.msi (this is the mobile filter.msi that you copied as the source file):</p> <ul style="list-style-type: none"> <li>• <b>source</b> - the source msi file: enter the name "mobile filter.msi".</li> <li>• <b>destination</b> - the destination mst file: enter a name for this file.</li> <li>• <b>/server:&lt;name&gt;</b> - the Mobile Filter server name (or IP address).</li> <li>• <b>/passwd:&lt;password&gt;</b> - the client password.</li> </ul> <p>You can also enter the following values if required:</p> <ul style="list-style-type: none"> <li>• <b>/descr:&lt;description&gt;</b> - enter a description of the client. This description will be seen in the Mobile Filter Administrator.</li> <li>• <b>/port:&lt;port&gt;</b> - enter a port number if you do not intend to use port 80, which is the default.</li> <li>• <b>/secure</b> - use a secure connection.</li> <li>• <b>/dump</b> - show the settings on screen that will be added to the MST file.</li> </ul>

### Example command line

The following is an example of a command line with the necessary values entered:

```
cscript scgenmst.vbs "mobile filter.msi" customer.mst /server:mfserver /passwd:abc123
```

The transform file can also be used along with the MSI to set a machine group policy to install the client. See the Windows group policy documentation for more details.

## Step 2 - Create a group policy

To use the following procedure you need to download and install the Group Policy Management console from the Microsoft website at: <http://www.microsoft.com/downloads>

### Procedure 4 Creating a group policy

Step	Action
1	Select <b>Administrative Tools &gt; Active Directory Users and Computers</b> from the Start menu.
<b>Create an Organizational Unit</b>	
2	If you wish to add devices to an existing organizational unit go straight to step 7. If you need to create a new one then follow steps 3-6.
3	In the <b>Active Directory Users and Computers</b> window, right-click your Active Directory.
4	Select <b>New &gt; Organizational Unit</b> .
5	Enter a name into the <b>New Object - Organizational Unit</b> dialog and click <b>OK</b> .
6	The new object will appear in the domain tree. Select the <b>Computers</b> node to see all available computers (devices) in the right-hand pane.
7	Drag the devices that you want to install the Mobile Filter client on to into the new organizational unit that you have just created.
<b>Create Group Policy Object</b>	
8	Right-click on the new organizational unit and select <b>Properties</b> .
9	Select the <b>Group Policy</b> tab, then click <b>Open</b> . This opens your organizational structure within the Group Policy Management console. <i>Note: If you did not download and install this software you will not see the option to open this program. You will need to close the Active Directory Users and Computers window and reopen it after you have installed the program, if you do it now.</i>
10	In the Group Policy Management window right-click the organizational unit that you have just created and select <b>Create and link a GPO from here</b> .
11	In the dialog that follows enter a name for the Group Policy Object. This name is then shown beneath both the organizational unit and the group policy object.
12	Right-click the new group policy object and select <b>Edit...</b>
13	The policy for Mobile Filter must always be applied to computers, not users. Expand <b>Computer Configuration</b> then expand <b>Software Settings</b> .

Step	Action
14	Right-click Software Installation and select <b>New &gt; Package</b> .
15	In the Explorer dialog, enter a UNC path to the .MSI installer file that you created in Procedure 4. Click <b>Open</b> . <i>Note: If you want to browse to the file rather than enter a UNC path, you must navigate via My Network Neighbourhood, otherwise the computers in your domain will not be able to access the .MSI installer file.</i>
16	In the <b>Deploy Software</b> dialog box select the <b>Advanced</b> option, then click <b>OK</b> .
17	You will now see the SurfControl Mobile Filter Properties dialog. Select the Modifications tab, then click <b>Add</b> .
18	Navigate to the transform file (MST) using a UNC path then click <b>Open</b> .
19	Click <b>OK</b> .
20	The software package is listed under Software Installations ready for deployment. You can double-click the package to edit it at any time.



**Note:** It is not possible to uninstall clients via Group Policy. This must always be done on an individual basis.

## USING A NETWORK UPGRADE FOR CLIENTS

When you have installed Service Pack 2, use the client Upgrade Details dialog to inform your client of the upgrade and, if necessary, force them to upgrade.

### Procedure 5 Configuring the server for network upgrades

Step	Action
1	Download the upgrade, then copy it into a shared folder.
2	Select <b>Client Upgrade Details</b> from the <b>Configure</b> menu in the Mobile Filter Administrator.
3	In the <b>Client Upgrade</b> dialog, select the client type that you want to apply upgrades to. The 'Client Type:' pane contains a list of clients that have registered with the Mobile Filter server during a client installation. If no clients have registered with the server, this list is empty.
4	Select the 'Upgrade is Available' check box.

Step	Action
	<div data-bbox="304 348 818 680" style="border: 1px solid gray; padding: 5px;"> </div> <div data-bbox="858 331 1396 714" style="margin-left: 20px;"> <p><b>Figure 3</b> License Upgrade Details</p> <ul style="list-style-type: none"> <li>• <b>Upgrade is Available</b> - if this is selected then an upgrade is available.</li> <li>• <b>Version number supplied in new client installer:</b> - the version of the upgrade.</li> <li>• <b>Web address of new client install</b> - the address of the web page that will lead the user to the installation.</li> <li>• <b>Test</b> - tests that the link works.</li> <li>• <b>Clients must upgrade</b> - Forces clients to upgrade</li> </ul> </div>
5	Enter the version number of the <b>NEW</b> client.
6	<p>If you have set up a web page for clients to upgrade from, type the URL to this page in the '<b>Web address of new client install:</b>' text box. The user will be directed to this site to upgrade. If no URL is entered then the user will be advised that there is an upgrade but they will have to contact their Systems Administrator for the update.</p> <p><i>Note: There are tools available for IIS servers that may prevent the downloading of client upgrades. Examples of these tools include the IIS Lock Down Tool Wizard (iislockd.exe) and URLScan, these will need to be disabled.</i></p>
7	Click <b>Test</b> to ensure that the link works. Your clients must be able to access the upgrade site remotely for the upgrading process to work.

 **Note:** You can select 'Clients must upgrade' to force your clients to upgrade before they can access the Internet.

## INSTALLING NEW CLIENTS

Procedure 6 describes the client installation process. This is what you will see if you manually install a new client onto a device:

### Procedure 6 Install process for the client

Step	Action
1	Start the Mobile Filter client installation from your chosen location.
2	When you see the Welcome screen click <b>Next</b> to continue with the install.
3	<p>If you select 'I Accept the terms in the license agreement' and click <b>Next</b> then you will see the Setup type dialog. Select a Setup Type:</p> <ul style="list-style-type: none"> <li>• <b>Complete</b> - a default installation and the recommended way to install the client.</li> <li>• <b>Custom</b> - enables you to specify the location to install to.</li> </ul>

Step	Action
4	Click <b>Next</b> to see the Server Details dialog.
5	<p>The Server Details dialog tells the client which Mobile Filter server to connect to for categorization requests, and whether to make this a secure connection or not. The various options available in this dialog include:</p> <ul style="list-style-type: none"> <li>• Leave the 'Use a secure connection...' check-box deselected and the Connection Port at <b>Automatic</b> - this will make an unsecure connection over the default port 80.</li> <li>• Leave the 'Use a secure connection...' check-box deselected and select <b>Custom</b> in the Connection Port section - this will make a unsecure connection over the port that you enter into the Port field.</li> <li>• Select the 'Use a secure connection...' check-box and select <b>Automatic</b> in the Connection Port section - this will make a secure connection over port 443.</li> <li>• Select the 'Use a secure connection...' check-box and select <b>Custom</b> in the Connection Port section - this will make a secure connection over the port that you enter into the Port field.</li> </ul> <p><b>Note:</b> For a secure connection the Fully Qualified Domain Name needs to be entered.</p>
	<div data-bbox="304 821 847 1234" data-label="Image"> </div> <div data-bbox="900 804 1310 831" data-label="Caption"> <p><b>Figure 4</b> The Server Details dialog</p> </div> <ul style="list-style-type: none"> <li>• <b>Server:</b> - the name of the Mobile Server.</li> <li>• <b>Use a secure connection when communicating with the server</b> - select to use a secure connection.</li> <li>• <b>Automatic</b> - port 80 will be used for an insecure connection, port 443 for a secure connection.</li> <li>• <b>Custom</b> - specify your own port.</li> </ul>
6	Click <b>Next</b> .
7	The next dialog you will see is the Security Information dialog where you can enter a password for this client. The password will be required when you try to uninstall the client, and will be visible within the Mobile Filter Administrator.
	<div data-bbox="304 1430 847 1843" data-label="Image"> </div> <div data-bbox="900 1419 1390 1446" data-label="Caption"> <p><b>Figure 5</b> The Security Information dialog</p> </div> <ul style="list-style-type: none"> <li>• <b>Enter Password</b> - enter a password for this client.</li> <li>• <b>Re-enter Password</b> - confirm the password.</li> </ul>

## *The Mobile Filter client*

Step	Action
8	Click <b>Next&gt;</b> .
9	The next dialog is the Client Description dialog. The client description appears within the Mobile Filter Administrator and enables the administrator to identify the client. Click <b>Next&gt;</b> and progress through the installation to the <b>Finish</b> .