



Internet

SurfControl Web Filter 5.0
Installation Guide

NOTICES

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- For the latest support information on SurfControl products, visit <http://www.surfcontrol.com/support>
- Read the Top Issues - This page has a quick list that covers the most common support issues with the SurfControl products. If your problem is here, you will have an immediate answer.
- Search our Knowledge Base - our new, constantly updated Knowledge Base contains articles, FAQs and glossary items to answer your questions about all SurfControl products.
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CONTENTS

| | |
|--|-----------|
| Notices | i |
| Comments on this Guide? | i |
| Technical Support | ii |
| SurfControl Sales | ii |
| Contents | iii |
| INTRODUCTION | 1 |
| Standalone Windows Edition | 2 |
| Pass-by filtering technology | 2 |
| System Requirements | 3 |
| INSTALLATION DECISIONS | 5 |
| Introduction | 6 |
| Network considerations | 7 |
| Hub versus switch | 7 |
| Network placement | 9 |
| Multiple NIC support | 12 |
| Installation considerations | 14 |
| Enable User Name Support | 14 |
| Install Virtual Control Agent | 15 |
| SurfControl Mobile Filter Administrator | 16 |
| SurfControl Web Filter Report Central | 16 |
| User Name Resolution | 17 |
| EUM | 18 |
| NetwareEUM | 20 |
| Database Considerations | 21 |
| MSDE Database | 22 |
| SQL Server | 23 |
| Database Authentication | 25 |
| Other Considerations | 26 |
| Content | 26 |
| E-mail notifications | 27 |
| Remote Administration | 28 |
| Privacy Edition considerations | 28 |
| INSTALLATION ORDER | 29 |
| Introduction | 30 |
| Installation procedures | 30 |
| Changes to the server | 31 |
| Allocating memory to the tempDB transaction log file | 51 |
| Remote Access to Report Central | 52 |
| System requirements for remote access | 52 |

Contents



Chapter 1

Introduction

Standalone Windows Edition
System Requirements

page 2

page 3

STANDALONE WINDOWS EDITION

SurfControl Web Filter for Windows:

- Utilizes pass-by technology (no latency).
- Provides for flexible deployment.
- Does not rely on existing network architecture.
- Filters all TCP-based protocols.
- Is transparent to the end-user.

PASS-BY FILTERING TECHNOLOGY

Protocol analyzers and network sniffers are examples of pass-by technology. Using pass-by technology, the software monitors the three-way handshake established by the source and destination hosts. If the connection violates a set of rules (like unacceptable destination, unauthorized IP source, etc.), the filtering software injects a packet into the network with all the required characteristics of the destination host. In other words, a packet from the filtering software appears to be from the destination host.

At the same time, the filtering software sends a packet to the destination host, mimicking the source host. At this point, the source and destination hosts believe they are in conversation with each other, when they are really communicating with the filtering software.

SYSTEM REQUIREMENTS

Table 1-1 gives the minimum and recommended specifications for installing SurfControl Web Filter and SurfControl Report Central:

Table 1-1 System Requirements

| Component | Minimum | Recommended |
|---|--|---------------------------------|
| Processor | Intel Pentium III | Intel Pentium IV |
| Memory | 512 MBytes RAM | 1 GByte RAM |
| Supported Operating Systems (with latest Service Packs) | Windows 2000 Server Windows 2000 Advanced Server Windows Server 2003 Standard Edition Windows Server 2003 Enterprise Edition | |
| Network | Up to three Network Interface Cards (NICs) in promiscuous mode. | |
| Databases (with latest Service Packs) | MSDE 2000 or MS SQL Server 7 or MS SQL Server 2000 Note: SurfControl recommends that you install MSDE or SQL Server before installing Web Filter. | |
| Disk Space | 1 GByte free | 5 GBytes free |
| Optional Netware user name support | If you plan to monitor users based on Netware user names, then you must install the Novell Netware Client (version 5.x) over IP on the Web Filter server prior to installing Web Filter. Active Directory (ADS) MS NT 4 Domain Controllers | |
| Optional Windows user name support | If you plan to monitor users based on Windows user names, then you must be using MS NT 4 or Active Directory domain controllers. | |
| Web browser | Microsoft Internet Explorer 5.0 | Microsoft Internet Explorer 6.0 |
| Applications | Adobe Acrobat Reader 6 for viewing reports in pdf format. | |

1

INTRODUCTION *System Requirements*



Chapter 2 Installation decisions

| | |
|-----------------------------|---------|
| Introduction | page 6 |
| Network considerations | page 7 |
| Multiple NIC support | page 12 |
| Installation considerations | page 14 |
| User Name Resolution | page 17 |
| Database Considerations | page 21 |
| Other Considerations | page 26 |

INTRODUCTION

This section discusses the decisions you must make before installing SurfControl Web Filter and is divided into the following sections:

Network Considerations

- How will you attach Web Filter to the network (hub or switch)?
- Where will you place the Web Filter server within the network?
- How many NICs does your installation require (1, 2 or 3)?

See “Network considerations” on page 7 for more details.

Installation considerations

- Do you want to enable user name support?
- Where do you want to install VCA?
- Do you want to install SurfControl Mobile Filter Administrator?
- Where do you want to install SurfControl Report Central?

See “Installation considerations” on page 14 for more details.



Warning: Without SurfControl Report Central you will be unable to run reports.

User name resolution

- How do you want Web Filter to handle user-name resolution?
- How do you want to monitor users (IP address, workstation name, EUM, NetwareEUM)?

See “User Name Resolution” on page 17 for more details.

Database options

- What database do you plan to use (MSDE or SQL)?
- How do you want Web Filter to connect to the database (Windows authentication or SQL authentication)?

See “Database Considerations” on page 21 for more details.

Other considerations

- Content information
- Which e-mail notifications should Web Filter send?
- What administrative privileges do you need to set up?

NETWORK CONSIDERATIONS

SurfControl Web Filter is modular in design, which allows maximum flexibility in network configuration. The location where you place the Web Filter server depends on your network's configuration.

Web Filter uses a sniffer engine to monitor Internet traffic. Therefore, the location of the Web Filter server is critical. Web Filter can only monitor and block the Internet traffic it can see. Routers, switches, and gateways may prevent Web Filter from seeing certain parts of your network. You must understand your network architecture before installing Web Filter.

HUB VERSUS SWITCH

Since Web Filter is based on pass-by filtering technology, you must place it in a location where it can “sniff” the protocols you want to filter. You must decide which method is best for your network configuration.

Hub

Since hubs broadcast data to all ports (see Figure 2-1), Web Filter is able to intercept the request and filter accordingly.:

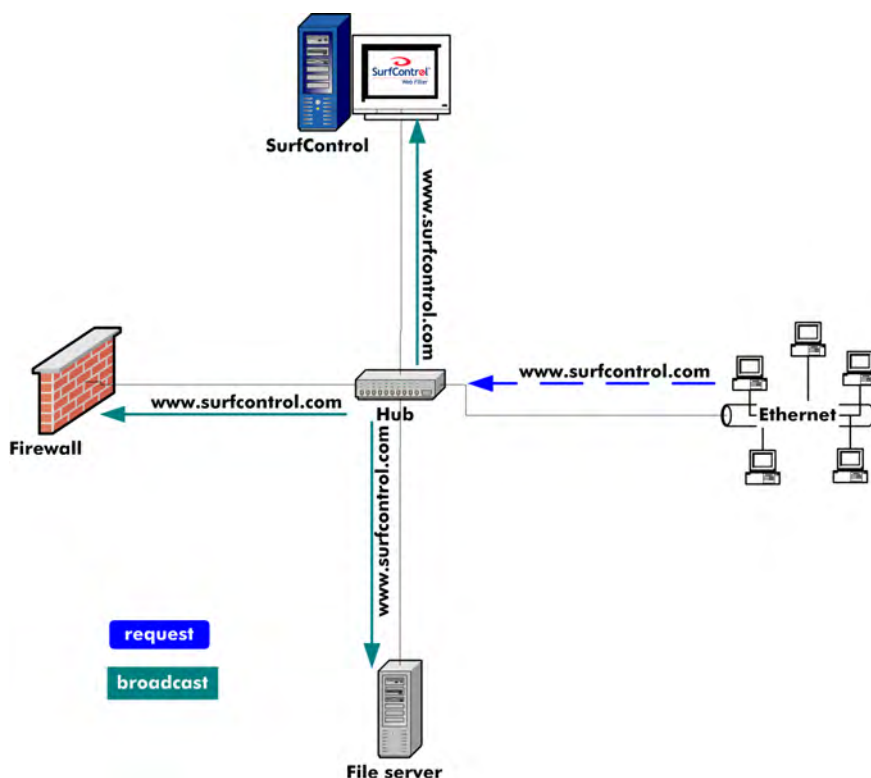


Figure 2-1 Web Filter connected to a hub

Switch

In order for Web Filter to see a request through a switch, span or mirror the port connecting the network to the Internet gateway to Web Filter's port. See Figure 2-2 for an example.:

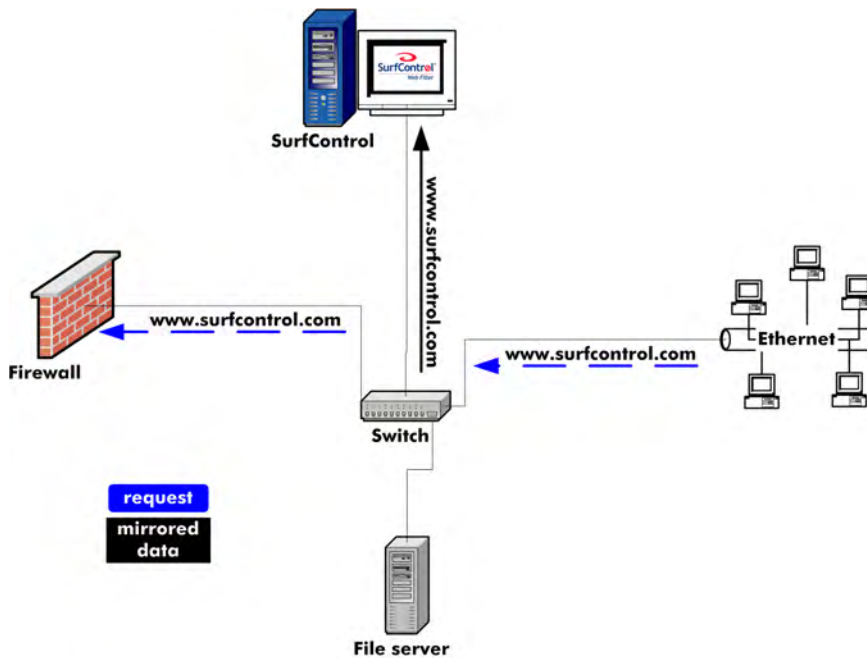


Figure 2-2 Web Filter connected to a Switch

If your switch is uni-directional and does not allow broadcasting and monitoring on the mirrored or spanned port, a second NIC is required. See “Multiple NIC support” on page 12 for more details.

For further information on configuring spanned ports, see the following Knowledge Base articles at

<http://kb.surfcontrol.com>:

- 1194 - About Installing SurfControl Web Filter on a Switch.
- 1201 - SurfControl Web Filter Is Installed on the Destination Port and Cannot Block Traffic.

You should also consult the documentation from the manufacturer of your switch for information on setting up spanned ports.

NETWORK PLACEMENT

SurfControl recommends installing Web Filter on a dedicated server. You should always place Web Filter in a location where it can see the traffic you want to monitor. In general, this is usually on the same switch or hub as the internal interface of your firewall.



Warning: In order to accurately monitor users, Web Filter should always be placed downstream of any proxy servers or caching devices.

Figure 2-3 shows Web Filter deployed in a small network:

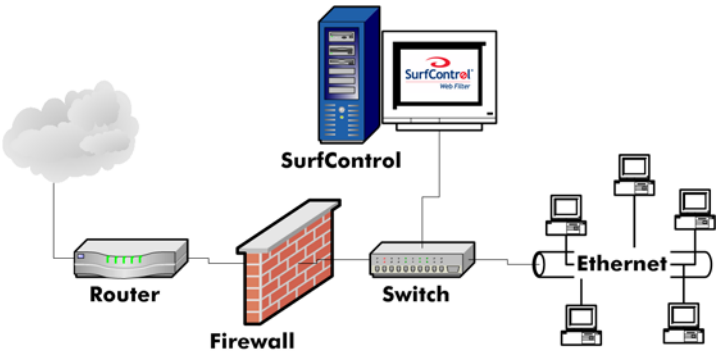


Figure 2-3 Web Filter in a single-segment network

Figure 2-4 shows a single Web Filter deployed in a larger network:

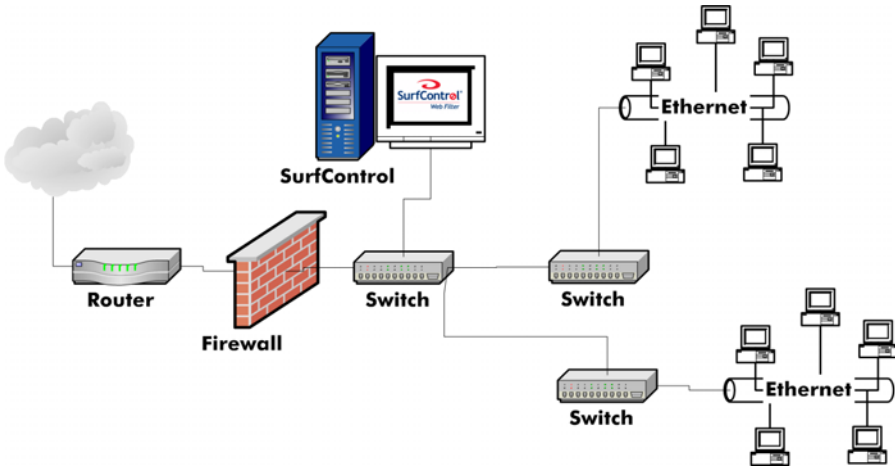


Figure 2-4 Web Filter in a multi-segment network

2 INSTALLATION DECISIONS

Network considerations

Larger networks may require multiple Web Filter servers to monitor and block Internet traffic. In these networks, you may choose to install two Web Filter servers at the firewall (Figure 2-5) or to install separate Web Filter servers for separate segments of the network (Figure 2-6):

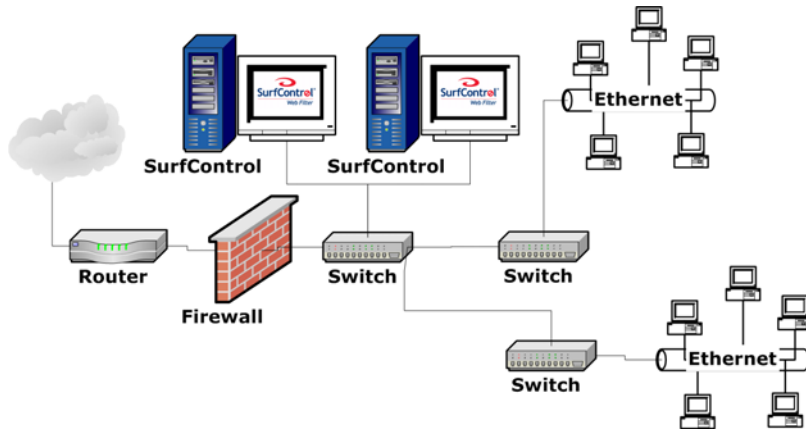


Figure 2-5 Multiple collectors at the firewall

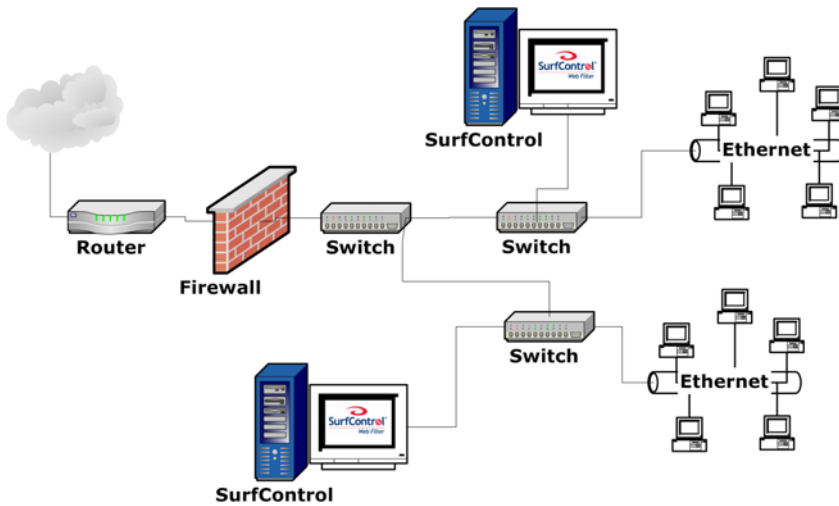


Figure 2-6 Multiple collectors for separate segments

Figure 2-7 shows Web Filter deployed in an enterprise network with multiple Internet gateways:

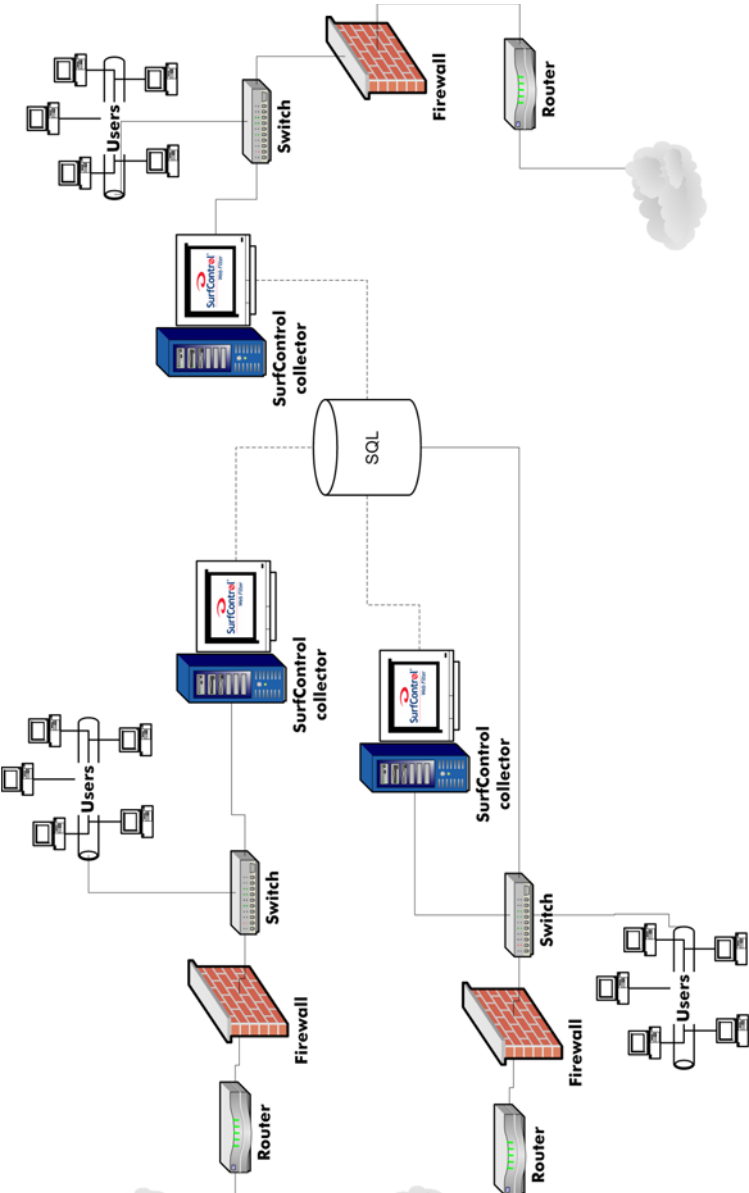


Figure 2-7 Web Filter in an Enterprise environment

MULTIPLE NIC SUPPORT

SurfControl Web Filter monitors Internet traffic by analyzing the data delivered from the spanned or mirrored port; Web Filter blocks traffic by inserting packets into the stream.

Switches support two methods of spanning: uni-directional and bi-directional. A switch that supports bi-directional spans allows the recipient server to receive and send data through the switch.

However, a switch that only supports uni-directional spans only allows the recipient server to receive data. Therefore, with a uni-directional span, Web Filter is unable to block Internet access.

Since some switches don't support bi-directional spans, Web Filter supports multiple NICs. In most cases, only two NICs are necessary: one to monitor, the other to block. Implementing Web Filter with multiple NICs resolves prior issues with switches that only supported one-way mirroring of a port.

You can configure Web Filter in one of the following ways:

- Single NIC (NIC1) configuration:
 - NIC1 monitors, blocks, and performs all TCP/IP related activity (i.e. database queries, database communication, DNS queries).
Configure this NIC to have an IP address.
During installation, bind Web Filter to this NIC.
 - This configuration requires a bi-directional span on the switch.
- Dual NIC (NIC1 and NIC2) configuration (option 1):
 - NIC1 monitors and blocks Internet traffic.
Do not configure this NIC to have an IP address.
During installation, bind Web Filter to this NIC.
 - NIC2 performs all other TCP/IP related activity (i.e. database queries, database communication, DNS queries).
Configure this NIC to have an IP address.
 - This configuration requires a bi-directional span on the switch.

- Dual NIC (NIC1 and NIC2) configuration (option 2):
 - NIC1 monitors Internet traffic.
Do not configure this NIC to have an IP address.
During installation, bind Web Filter to this NIC.
 - NIC2 blocks Internet traffic and performs all other TCP/IP related activity (i.e. database queries, database communication, DNS queries).
Configure this NIC to have an IP address.
 - This configuration requires a uni-directional span on the switch.
- Triple NIC (NIC1, NIC2, and NIC3) configuration:
 - NIC1 monitors Internet traffic.
Do not configure this NIC to have an IP address.
During installation, bind Web Filter to this NIC.
 - NIC2 blocks Internet traffic.
Do not configure this NIC to have an IP address.
 - NIC3 performs all other TCP/IP related activity (i.e. database queries, database communication, DNS queries).
Configure this NIC to have an IP address.
 - This configuration requires a uni-directional span on the switch.

INSTALLATION CONSIDERATIONS

During installation, you can set the following options for SurfControl Web Filter's basic behavior:

- Enable User name Support.
- Install Virtual Control Agent.
- Install SurfControl Mobile Filter Administrator. You must have the Mobile Filter server installed on your network for the Administrator to work properly.
- Install SurfControl Report Central.

ENABLE USER NAME SUPPORT

Web Filter monitors Internet usage based on user name, workstation name, or IP address. The Enable User Name Support option sets the monitoring method. By choosing Enable User Name Support, Web Filter attempts to resolve the MAC address into a user name by a NetBIOS query. If unchecked, Web Filter monitors traffic based on the workstation name or IP address.



Note: You must enable user name support if you plan to install EUM

The NetBIOS method of username resolution works well in small, flat networks where there are no routers between Web Filter and end-users.

NetBIOS is not practical in a routed environment and SurfControl recommends not using it for Web Filter in an environment with more than 250 users.

If you wish to use Web Filter to detect Windows NT user names, NetBIOS must be installed on all network clients. If you have users who log in to more than one workstation, SurfControl recommends you configure Web Filter to monitor the workstation name rather than the user name.

SurfControl recommends using Enterprise User Monitor (EUM) instead of the NetBIOS method. See “EUM” on page 18 for more details.

EUM solves the following issues with NetBIOS:

- NetBIOS on Windows NT only reports the first instance of a user login. EUM resolves this issue.
- If multiple users share a workstation, there may be a 600 second lapse in which the original user is monitored. This can be configured in the Web Filter Service Settings. See the “Advanced tab” section of the “Web Filter Service” chapter in the *Administrators Guide*.
- SurfControl recommends using the EUM instead of the NetBIOS method. See “EUM” on page 18 for more details.

INSTALL VIRTUAL CONTROL AGENT

The Virtual Control Agent (VCA) uses the latest neural network techniques to intelligently classify unknown or 'None' Web sites into one of 47 categories. The VCA categorizes English, German, French, Spanish and Dutch content focusing on non-business areas such as "adult," "gambling" and "sports." The VCA is targeted to identify non-business sites that affect productivity in the workplace.

SurfControl recommends installing VCA onto a single Web Filter computer within a multi installation environment, where the traffic volume is low.

Before installation, make sure the server where VCA is installed meets the minimum requirements for VCA as described in Table 2-1.

Table 2-1 Minimum Requirements for VCA

| Component | Minimum | Recommended |
|---|---|------------------|
| Processor | Intel Pentium III | Intel Pentium IV |
| Memory | 256 MBytes RAM | 1 GByte Ram |
| Supported Operating Systems (with Latest Service Packs) | Windows 2000 Server Windows 2000 Advanced Server Windows Server 2003 Standard Edition Windows Server 2003 Enterprise Edition | |
| Disk space | 1 GByte free | |

During installation, you can choose to install and register VCA or install it for a 30-day evaluation period.



Note: The service side of the VCA only functions for a registered version of the VCA. See Chapter 10 of the *Administrator's Guide* for more details on the VCA service.

SURFCONTROL MOBILE FILTER ADMINISTRATOR

SurfControl Mobile Filter enables you to extend your corporate Acceptable Use Policy beyond the walls of the office. With Mobile Filter you can manage the Internet use of travelling employees and employees working from home.

Mobile Filter uses a thin-client installed on a range of Internet enabled devices such as laptops and ties them into the corporate Internet usage policy.

If you want to manage the Mobile Filter server from the Web Filter server select the SurfControl Mobile Administrator option.



Warning: You must have SurfControl Mobile Filter server installed on your network for the Administrator to work properly.

For more details on Mobile Filter, consult the SurfControl Web Filter *Administrator's guide*.

SURFCONTROL WEB FILTER REPORT CENTRAL

To be able to produce reports on your company's Internet activity you need to install SurfControl Report Central. If you decide not to install Report Central as part of the Web Filter installation, you can do so later from the executable (setup.exe) in the following folder depending whether you have a product CD, or a Web site download:

- Product CD: webstd\English\Reporting Filter
- Web site download: English\Reporting



Note: Because SurfControl Report Central can contain confidential information on its database, you should install it in a secure environment.

USER NAME RESOLUTION

By default, SurfControl Web Filter resolves user names by issuing a NetBIOS query based on the MAC address. Web Filter includes the **Enterprise User Monitor (EUM)** utility for resolving user names in a routed network. In a NETWARE environment you also have the option to monitor Novell User Names.



Note: Web Filter supports three monitoring methods: user name, workstation name or IP address.

SurfControl recommends monitoring by user because:

- Monitoring by workstation name only identifies the machine requesting the data, not the user who originated the request.
- Monitoring by user names is more convenient in a workplace where employees share or swap machines frequently.
- Monitoring by user names allows you to filter users based on NT Users and Groups.
- Monitoring by user name makes it easier to track users that frequently login to multiple machines.

Web Filter places data on the Monitor with the following precedence:

- 1 User name resolved with NetwareEUM.
- 2 User name resolved with EUM.
- 3 User name based on NetBIOS query.
- 4 Workstation ID.
- 5 IP address.

EUM

By accessing Windows NT and Windows 2000/2003 security auditing data to resolve user names, EUM gives Web Filter for NT/2000 the ability to monitor traffic on a routed network by user name. EUM provides Web Filter with continuous, accurate reporting of logon activity by user name.



Note: SurfControl recommends using EUM for user name resolution.

For example, when jsmith attempts to access <http://www.cnn.com>, Web Filter sees jsmith's IP address in the HTTP request. EUM provides the missing link by receiving data from the domain controllers regarding jsmith's identity.

EUM on Windows 2000/2003 domain controllers

The EUM agent installs onto Windows 2000/2003 domain controllers as a dll (ScSubAuth.dll).

When EUM is installed onto a Windows 2000/2003 server, Web Filter uses Microsoft's Sub-Authentication to resolve user names. After installing EUM on a Windows 2000/2003 domain controller, you must reboot the domain controller.

EUM on Windows NT domain controllers

Web Filter installs the EUM User Agent (UA) onto Windows NT domain controllers as a service (SurfControl User Agent service; ScUserAgent.exe). During EUM installation, Web Filter configures NT domain controllers to record Successful Logons to the security log (event 528). If you make changes to this audit policy and disable event 528 logs (Successful Logon), EUM will no longer operate properly.

Confirm that event 528 logs are enabled by performing the following:

- 1 From the Web Filter server, Start Programs Administrative Tools User Manager for Domains.
- 2 From the menu, select Policies Audit. Confirm that **Audit these Events** is checked.
- 3 Ensure security logs are set to overwrite as needed. Do not manually clear the security logs.

Before installation

Prior to installing the EUM UA onto an NT domain controller, ensure the trust relationships are set up for multiple domain environments (in this case, Web Filter is Trusted, all other domains are Trusting).

Installing EUM

Install EUM from the Web Filter server. During installation, Web Filter installs the EUM UA onto each domain controller. Before installing EUM, ensure the following:

- The Web Filter server must have a static IP address.
- The installer must be logged into the Web Filter server as a user with domain administration rights.
- In order for a successful automatic installation, Web Filter must be able to see the domains that require EUM. Make sure Web Filter is located in the appropriate domain.
 - In a two-way trusted environment, the Web Filter server can be located in any domain.
 - If a one-way model is in use, the Web Filter server should be located in the master domain (this allows Web Filter to see all other domains).
- For Windows NT domain controllers, make sure the security logs of all domain controllers are set to overwrite events as needed.
- By default, EUM uses port 61695 to communicate with the Web Filter server. Perform the following steps to change the port:
 - 1 Add the following key to the SurfControl registry:
`HKEY_LOCAL_MACHINE\SOFTWARE\JSB\SurfControlScout\UserAgentPort`
 - 2 Add the key as a DWORD, specify a decimal value (default is 61695).
 - 3 Stop and start the Web Filter service.
 - 4 Update the scua.ini file on the domain controllers to reflect the port changes.
- SurfControl recommends installing EUM when there are few or no users on the network or when a forced logoff can be scheduled.
- During installation, you'll be prompted to specify specific user accounts that UA should ignore; you should only use the ignore option for accounts similar to SMS or service accounts (i.e., backup.exe, anti-virus updates, servers, etc.).



Warning: Ignoring valid user accounts will result in mis-identification.

NETWAREEUM

Web Filter also provides the ability to monitor users by their Novell Netware user name. The Novell version of EUM is called NetwareEUM. NetwareEUM works in the same way as EUM. Web Filter installs a User Agent onto each Novell NDS Tree Server.



Warning: Web Filter does not support Novell 4.x. If you need to resolve Novell 4.x users, authenticate all users on an NT or 2000 domain controller and use EUM to resolve the user names.

Before installing NetwareEUM, ensure the following:

- Before installing Web Filter, install Netware's Client 32 (as Preferred TCP/IP Protocol) onto the server.
- Network must be using Novell 5 or 6 over IP.
- The Web Filter server must have a static IP address. You need to manually edit the `scua.ini` file to add the host name or IP address and port number of any Web Filter servers. See "Add Web Filter Servers to NetWare EUM" on page 44 for more details.
- By default, NetwareEUM uses port 61696 to communicate with the Web Filter server. Perform the following steps to change the port:
 - 1 Add the following key to the registry:
`HKEY_LOCAL_MACHINE\SOFTWARE\JSB\SurfControlScout\ NWUserAgentPort`
 - 2 Add the key as a DWORD, specify a decimal value (default is 61696).
 - 3 Stop and start the Web Filter service.
- SurfControl recommends installing NetwareEUM when there are few or no users on the network or when a forced logoff can be scheduled.

Ignoring Users in NetWare EUM

Users such as administrative groups, other NetWare servers or users using ZENworks need to be ignored by the NetWare server where Web Filter is installed. This requires the `scua.ini` file to be edited.

Ignoring other NetWare servers can prevent caching problems, especially when setting the Logging level to 2. See "Logging levels" on page 21 for more details.

Logging levels

A log file `surflog.txt` will be created and stored in the same directory as the `scua.ini` and `nweum.nlm` files. This holds details of various events. In a default installation this is located in:

`C:\Program Files\SurfControl\Web Filter\NetWare`

In the `scua.ini` file you can set the logging level for events to be stored in this file. The levels are as in Table 2-2. The default logging level is 1:

Table 2-2 Logging Levels

| Value | Logging detail |
|-------|--|
| 0 | No logging. |
| 1 | Important events - Startup, Shutdown, Errors, connection with Web Filter installations, connection failures, disconnections. |
| 2 | Login events such as Ignored Users. |
| 3 | Combination of levels 1 and 2. |

DATABASE CONSIDERATIONS

Web Filter ships with Microsoft SQL Server 2000 Desktop Engine (MSDE 2000), but can also create the data structure in a fully-licensed version of Microsoft SQL 7.0 or SQL 2000. If you plan to use a fully-licensed version of SQL, make sure the software is installed and running before attempting to install Web Filter.

Using a fully-licensed version of SQL (rather than MSDE) allows more flexibility and the ability to fine-tune database performance. Web Filter performs extremely well in either case.

Web Filter connects to the database using a fully-qualified connection string. This string contains all the details required to connect to a database including database type, name of the server, user id, password, and database name. Using a connection string does not require the creation of DSNs. Therefore, any Web Filter client or server on the network can access the database without creating a link through the ODBC.

MSDE DATABASE

If you are not using a SQL Server database, you need to install MSDE. SurfControl recommends you install MSDE before installing Web Filter.



Warning: Microsoft states the maximum size of an MSDE database is 2 GBytes.

MSDE allows a seamless upgrade to a SQL database in the future. You can access MSDE data tables using the Windows OSQL utility from the command prompt. For more details about the OSQL utility, visit www.microsoft.com.

If you install MSDE onto the Web Filter server, make sure the server meets the minimum resources listed in Table 2-3:

Table 2-3 MSDE minimum requirements on Web Filter server

| # Users | Computer Specification |
|------------|--|
| <500 | Intel Pentium IV, 2 GBytes RAM, 1.2 GHz processor, 10 GBytes hard drive. |
| 500 - 1000 | Intel Pentium IV, 3 GBytes RAM, 1.4 GHz processor, 20 GBytes hard drive. |
| >1000 | SurfControl recommends a dedicated SQL Server installation. |

SQL SERVER

If you have a Microsoft SQL Server on your network, you should plan to create the database on that server (you can create and configure the database during the installation process).



Note: SurfControl recommends installing SQL Server on a dedicated server.

If you plan to use SQL Server, but have not installed it, complete the following tasks before installing Web Filter:



Warning: Install SQL Server with the default settings of case insensitivity, including Dictionary Order. Choosing case sensitivity may cause problems when installing Web Filter.

- 1 Install the SQL Server Client Connectivity Pack onto the server where you install Web Filter.
- 2 Install SQL Server on the designated server; this can be the same machine as the Web Filter server.
- 3 Make sure your server has the minimum resources listed in Table 2-4:

Table 2-4 SQL Server minimum requirements on Web Filter server

| # Users | Computer Specification |
|-------------|--|
| <500 | Intel Pentium IV, 2 GBytes RAM, 1.2 GHz processor, 10 GBytes hard drive. |
| 500 - 1000 | Intel Pentium IV, 3 GBytes RAM, 1.4 GHz processor, 20 GBytes hard drive. |
| 1000 - 5000 | Intel Pentium IV, 5 GBytes RAM, 1.4 GHz processor, 40 GBytes hard drive. |
| >5000 | Intel Pentium IV, 7 GBytes RAM, 1.8 GHz processor, 60 GBytes hard drive. |

- 4 Configure SQL Server to limit memory and processors when running both Web Filter and SQL Server on the same computer.
 - There should only be one database owner (db_owner) per database.
 - If you need to have multiple user accounts with database access, the other users should only have db_datareader and db_datawriter permissions.

Reasons to install SQL Server onto a dedicated server

Web Filter supports SQL 7.0 and SQL 2000. Use a fully-licensed version of SQL Server on a dedicated server if your company:

- Plans to store large amounts of data (i.e. you have a large number of users, high Internet activity, or need to retain data for an extended period of time).
- Requires Web Filter to write data to a database that is not resident on the Web Filter server.
- Requires more than one Web Filter server (collector) to consolidate data in a single database.
- Plans to store Web Filter, SurfControl IM Filter, and SurfControl E-mail Filter data on the same SQL installation.

Considerations for large environments

Make sure your dedicated SQL server has the minimum resources listed in Table 2-5:

Table 2-5 SQL server minimum requirements for large environments

| # Users | Computer Specification |
|-------------|---|
| <500 | Intel Pentium IV, 1 GByte RAM, 1.2 GHz processor, 10 GBytes hard drive |
| 500 - 1000 | Intel Pentium IV, 2 GBytes RAM, 1.4 GHz processor, 20 GBytes hard drive |
| 1000 - 5000 | Intel Pentium IV, 4 GByte RAM, 1.4 GHz processor, 40 GBytes hard drive |
| >5000 | Intel Pentium IV, 6 GByte RAM, 1.8 GHz processor, 60 GBytes hard drive |

DATABASE AUTHENTICATION

Web Filter supports both Windows authentication and SQL authentication.

SurfControl recommends Windows authentication due to ease of use. With SQL authentication if a password is changed, any configured connections would have to be re-established. With Windows authentication they would still work. This is also in line with Microsoft's security recommendations.

Windows authentication

If you choose to use Windows authentication, make sure domain rights are correctly configured between the Web Filter server and the SQL server. The Web Filter installer account requires SQL Server database creator rights.

SQL authentication

If you choose to use SQL authentication, you will need to create a SQL Server login specifically for Web Filter. This login is required for creating the database and should be used for all Web Filter database activities.

If you choose to connect to the SQL database using SQL authentication, make sure the SQL server is configured to support SQL Server and Windows NT authentication.

OTHER CONSIDERATIONS

This section contains general information that you should be aware of when installing SurfControl Web Filter.

CONTENT

SurfControl's URL Category List is the premier category database in the filtering industry and provides the most accurate, current, and relevant content listing available. The URL Category List includes:

- 47 well-organized categories.
- Over 9 million sites, including more than 1.7 billion web pages.
- International content, including 70 languages and over 200 countries.
- Daily updates (more than 45,000 new sites a week).

The URL Category List is stored in an encrypted, size-optimized file called `SurfControl Categories.csf`. Incremental updates (up to 60 MB) are stored in an encrypted file called `SurfControl Categories.cdb`. With Web Filter, you can manually categorize sites; these are added to the `SurfControl Manual Categories.cdb` file. VCA categorized sites are added to the `SurfControl VCA Categories.cdb` file. Web Filter checks the categorization files in the following order:

- 1 Manually-categorized sites (`Manual Categories.cdb` file)
- 2 Incremental updates (`SurfControl Categories.cdb`)
- 3 URL Category List (`SurfControl Categories.csf`)
- 4 VCA categorized sites (`SurfControl VCA Categories.cdb`)

E-MAIL NOTIFICATIONS

Web Filter includes the ability to automatically notify the system administrator when any of the following events occur:

- **Service running status change** -if the status of any of the Web Filter services changes (i.e., from Running to Stopped). This is an optional notification.
- **Network overload notifications** - if Web Filter enters network overload due to the volume of Internet traffic received. This is an optional notification.
- **Scheduled task failures** - if a scheduled task fails to run. This is an optional notification.
- **URL Category List license reminders** - if the URL Category List license is close to expiring. This is an optional notification.
- **URL Category List update not performed** - if no update has been performed for a week (seven days) a reminder will be sent.
- **Unregistered product reminders** - if you haven't registered the product. This is a default reminder and will be sent if you choose to enable the feature (by identifying a mail server and recipient).

If you decide to enable this feature, you will need to know the IP address of your mail server and will need to identify an administrator who will receive the notifications.

If you choose not to enable this feature, then Web Filter will not send notifications for any of the events listed above.

REMOTE ADMINISTRATION

System administrators can remotely administer Web Filter by installing the Remote Administration Client. From the client installation you can:

- View monitored traffic.
- Create and edit rules.
- Run reports.
- Start and stop the Web Filter Service.
- Start and stop the Scheduler Service.
- Access the Real-Time Monitor.
- Set up scheduled events.

You can also install the SurfControl Mobile Filter Administrator.

Before installation, make sure the administrator computer meets the minimum requirements listed in Table 2-6:

Table 2-6 Remote Administration Client minimum requirements

| | Minimum | Recommended |
|---|--|--------------------------|
| Processor | Intel Pentium III | Intel Pentium IV |
| Memory | 256 MBytes RAM | 512 MBytes RAM |
| Supported Operating Systems (with latest Service Packs) | Windows 2000 Professional or Server Windows Advanced Server Windows XP Windows Server 2003 Standard Edition Windows Server 2003 Enterprise Edition | |
| Network | Ethernet card | |
| Disk Space | 5 GBytes free | |
| Web browser | MS Internet Explorer 5.0 | MS Internet Explorer 6.0 |

PRIVACY EDITION CONSIDERATIONS

You can only upgrade from the previous Privacy edition (4.2.0.6) to version 5.0. You cannot upgrade from any standard version of Web Filter to the Privacy edition.

For details on the Privacy Edition features, see Chapter 5 - Privacy Edition in the *Administrator's Guide*.



Chapter 3 Installation order

| | |
|---|---------|
| Introduction | page 30 |
| Installation procedures | page 30 |
| Changes to the server | page 31 |
| Installing MSDE (optional) | page 31 |
| Installing SurfControl Web Filter | page 32 |
| NIC Configuration | page 40 |
| Installing EUM | page 41 |
| Installing EUM on NetWare | page 43 |
| Automatically loading the NetWare EUM | page 44 |
| Unloading the NetWare EUM | page 44 |
| Installing the Web Filter Administration client | page 46 |
| Serializing SurfControl Web Filter | page 50 |
| Serializing the VCA | page 50 |
| Allocate more memory to tempDB Log File | page 51 |
| Remote Access to Report Central | page 52 |
| Distributing the remote access shortcut | page 52 |

INTRODUCTION

SurfControl recommends installing in the following order:

- 1 If you plan to monitor Netware user names, install the Netware client onto the Web Filter server.
- 2 If you are using MSDE 2000 as your database, SurfControl recommends installing MSDE prior to installing Web Filter.
- 3 If you are using SQL 7.0 or SQL 2000 as your database, install the SQL client onto the Web Filter server.
- 4 Install the complete product onto the Web Filter server.
- 5 If you plan to monitor Windows users by user name, install EUM onto all domain controllers.
- 6 If you plan to monitor Netware user names, install NetwareEUM onto all NDS servers.
- 7 Install the Remote Administration software and VCA, if required.

INSTALLATION PROCEDURES


This section contains the following procedures:

- 1 Installing MSDE (optional) - Procedure 3-1.
- 2 Installing Web Filter - Procedure 3-2.
- 3 Configuring Web Filter for multiple NICs - Procedure 3-3.
- 4 Installing EUM (optional) - Procedure 3-4.
- 5 Installing NetwareEUM (optional) - Procedure 3-5.
- 6 Automatically loading NLM (optional) - Procedure 3-6.
- 7 Unloading NLM (optional) - Procedure 3-7:
- 8 Adding Web Filter Servers to NetWare EUM (optional) - Procedure 3-8.
- 9 Ignored users in NetWare EUM (optional) - Procedure 3-9.
- 10 Installing the Web Filter Administration client - Procedure 3-10.
- 11 Serializing Web Filter - Procedure 3-11.
- 12 Serializing the VCA - Procedure 3-12.
- 13 Allocating more memory to tempDB Log File for Report Central (optional) - Procedure 3-13.
- 14 Distributing the remote access shortcut for Report Central - Procedure 3-14.


You can cancel the installation of Web Filter at any time by clicking **Cancel**. You will have to re-start the installation process if you decide to install again at a later date.

CHANGES TO THE SERVER

Installing Web Filter makes the following changes to your server:

- Places an icon in the system tray at startup .

From this icon, you can start, stop and configure the Web Filter service, and the Scheduler service. You can also serialize the product.



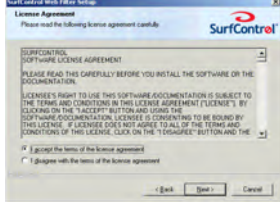
If the Web Filter Service has been stopped the icon is grayed out .

In a Web Filter Administration client installation the gray icon is placed in the system tray, to indicate that the service is not running locally.
- Adds Web Filter executables to the Start menu (**Programs > SurfControl Web Filter**).
- Adds necessary registry entries.
- Creates the SurfControl_WebFilter database.
- Adds the following services:
 - Web Filter service
 - Scheduler service
 - Remote Administration service
 - Audit Logger service
 - Virtual Control Agent service (if selected during installation)

Procedure 3-1: Installing MSDE (optional)

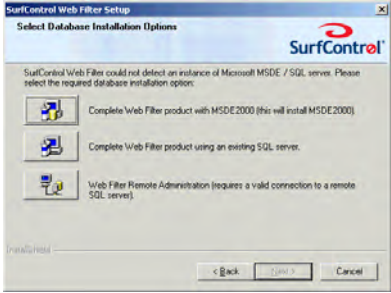

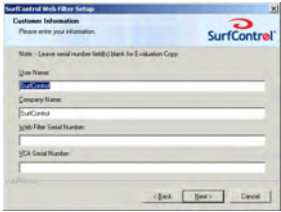
| Step | Action |
|------|---|
| 1 | If you plan to use an MSDE database, SurfControl recommends installing MSDE prior to performing the Web Filter installation. You can download our recommended version of MSDE at www.surfcontrol.com from the Downloads > Free Trial of SurfControl > Web Filter menu. You will need to register first to access this download. |
| 2 | Locate the downloaded file (<code>setup.exe</code>). |
| 3 | Double-click <code>setup.exe</code> to start the installation process. |
| 4 | If you are using SQL authentication and have chosen to set a Systems Administrator (SA) password, enter the password when prompted. |
| 5 | You will need to restart the server before installing SurfControl Web Filter. |

Procedure 3-2: Installing SurfControl Web Filter

| Step | Action | |
|--|---|--|
| 1 | Locate the downloaded SurfControl Web Filter executable file (setup.exe). | |
| 2 | Double-click setup.exe to start the installation process. | |
| 3 | The InstallShield Wizard loads. | |
| 4 | Click Next to continue. | |
| SurfControl Web Filter Setup screen | | |
| 5 | Welcome to SurfControl Web Filter. |  |
| 6 | Click Next to continue. | |
| Important Installation Information screen | | |
| 7 | Prior to starting the installation, you should have determined the appropriate network configuration for Web Filter. |  |
| 8 | Click Next to continue. | |
| License Agreement screen | | |
| 9 | Read the License Agreement. |  |
| 10 | Do you agree to the terms? <ul style="list-style-type: none"> Yes, select I accept...Click Next to continue. No, select I disagree...Click Cancel to exit the installation process. | |

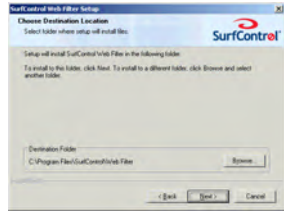


(Sheet 1 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|---|---|--|
| Select Database Installation Options | | |
| 11 | <p>If you did not install MSDE prior to Web Filter, you can now choose your database options. You can either:</p> <ul style="list-style-type: none"> • Install the complete product which will also install MSDE 2000. • Install the complete product using an existing SQL Server database. • Install the Remote Administration version of Web Filter. <p>Note: <i>If you choose to install the complete product with MSDE, you will need to re-boot your computer as part of this process.</i></p> |  |
| 12 | Click Next to continue. | |
| Setup Type | | |
| 13 | <p>Select the version of Web Filter you want to install: The options are:</p> <ul style="list-style-type: none"> • SurfControl Web Filter • SurfControl Mobile Filter <p>You also have the option to install a version of Web Filter that meets legislation in some European countries that forbids user browsing details to be viewed without express management and union permission. Select this option if you wish to use this version of Web Filter. For more details see Chapter 5 - Privacy Edition of the <i>Administrator's Guide</i>.</p> |  |
| 14 | Click Next to Continue. | |
| Customer Information screen | | |
| 15 | Enter a name in the User Name field. | |
| 16 | Enter your company's name in the Company Name field. | |
| 17 | Enter the Serial Number for Web Filter and VCA, if available. If you are evaluating the product, leave these blank. You have 30 days to evaluate the product. | |
| 18 | Click Next to continue. |  |




(Sheet 2 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|--|--|---|
| Choose Destination Location screen | | |
| 19 | Select the folder where setup will install files. The default is: C:\Program Files\SurfControl\Web Filter. Choose another location by selecting Browse and navigating to a different location. |  |
| 20 | Click Next to continue. | |
| Setup Type screen | | |
| 21 | Select Complete Product . |  |
| 22 | Click Next to continue. | |
| Select Server Installation Options screen | | |
| 23 | If you want Web Filter to attempt to resolve user names based on the requesting IP address, select Enable User Name Support . |  |
| 24 | If you want to install VCA onto the Web Filter server, select Install Virtual Control Agent . Note: <i>SurfControl recommends installing VCA onto a different computer than the Web Filter server.</i> | |
| 25 | Select SurfControl Mobile Filter Administrator , if you want to be able to manage the Mobile Filter server from this computer. Note: <i>you must have the SurfControl Mobile Filter server installed on your network for the Administrator to work correctly.</i> | |
| 26 | If you want to install SurfControl Report Central, select SurfControl Web Filter Report Central . The installation of Report Central will start automatically after Web Filter has installed. | |
| 27 | Click Next to continue. | |
| 28 | Does the server have multiple NIC's installed? If yes, go to step 29. If no, the Select Internal Traffic Subnets screen will appear. | |




(Sheet 3 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|---|--|--|
| Select MSDE/SQL Server screen | | |
| 38 | From the drop-down list, choose the server where the SQL database is running. You can also enter the name of a server here. |  |
| 39 | Select the Authentication method. Note: <i>SurfControl recommends using Windows authentication.</i> Note: <i>If you choose Windows authentication, both the Web Filter server and the SQL server must be members of the same domain.</i> | |
| 40 | Click Next to continue. | |
| Select MSDE/SQL Server Database screen | | |
| 41 | Choose the database you want to create. Note: <i>In most cases, you should use the default database (SurfControl_WebFilter); you can enter a new name, if necessary.</i> |  |
| 42 | Click Next to continue. | |
| 43 | Did you choose Windows Authentication to connect to a remote SQL Server database? If Yes go to Step 40 If No go to Step 42 | |
| Select Account for Web Filter Service | | |
| 44 | Choose the domain account you want Web Filter to use when connecting to the remote SQL Server database when using Windows Authentication. |  |
| 45 | Click Next to continue. | |


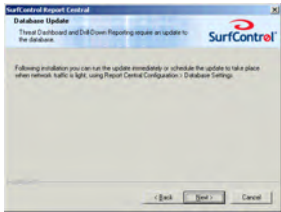

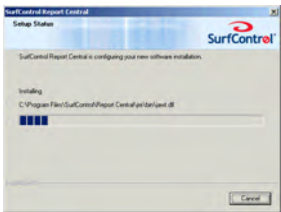
(Sheet 5 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|--|--|--|
| System Administrator Notifications screen | | |
| 46 | Enter the E-mail Server name or IP address. |  |
| 47 | Enter the Recipient Address . | |
| 48 | Enter the From Address (using the default address supplied is suitable). | |
| 49 | Choose the types of notification you want to receive. | |
| 50 | Click Next to continue. Note: <i>You can change these settings following installation from the Web Filter Service Settings. See the Web Filter Service chapter of the Administrator's Guide for more details.</i> | |
| SurfControl Report Central installation | | |
| 51 | The installation of Report Central will now start. | |
| Create Reports Administrator User | | |
| 52 | You need to set up an initial Report Administrator level user for Report Central. This user can then add other users and configure Report Central to suit your organization. Enter a User name and a Password , which you need to confirm. |  |
| 53 | Click Next to continue. | |
| Select MSDE/SQL Server screen | | |
| 54 | From the drop-down list, choose the server where the SQL database is running. You can also enter the name of a server here. |  |
| 55 | Select the Authentication method. Note: <i>SurfControl recommends using Windows authentication.</i> Note: <i>If you choose Windows authentication, both the Web Filter server and the SQL server must be members of the same domain.</i> | |
| 56 | Click Next to Continue. | |



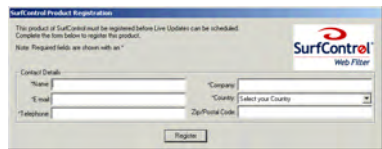
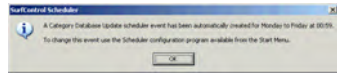
(Sheet 6 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|--|---|--|
| Select MSDE/SQL Server Database screen | | |
| 57 | Choose the database you want to connect to. Note: <i>The default database is SurfControl_WebFilter.</i> |  |
| 58 | Click Next to continue. | |
| Report Central Database update | | |
| 59 | For Report Central to give accurate results, its database needs to be updated before reports are run. You need to perform this from the Configuration > Database Connections > Update Tasks tab from Report Central. |  |
| 60 | Click Next to continue. | |
| 61 | Did you choose Windows Authentication to connect to a SQL Server database? If Yes go to Step 62. If No go to Step 64. | |
| Select Account for SurfControl Report Central Service | | |
| 62 | Choose the domain account you want Report Central to use when connecting to the remote SQL Server database when using Windows Authentication. |  |
| 63 | Click Next to continue. | |
| Setup Status | | |
| 64 | Report Central is performing the requested operations. Note: <i>When you log on to Report Central for the first time, you will be prompted to download the appropriate Java Runtime Environment, if it is not already installed on your computer.</i> |  |

(Sheet 7 of 8)

Procedure 3-2: Installing SurfControl Web Filter (Continued)

| Step | Action | |
|--|--|--|
| InstallShield Wizard Complete | | |
| 65 | The installation of Web Filter is complete. |  |
| 66 | Click Finish . | |
| Information | | |
| 67 | You are now asked to complete your registration details for URL Category List updates. Click OK to continue. |  |
| SurfControl Product Registration Screen | | |
| 68 | Complete the fields in the form. |  |
| 69 | Click Register . | |
| SurfControl Scheduler | | |
| 70 | You will see a dialog box informing you that a scheduled event has been created for your URL Category List updates. |  |

(Sheet 8 of 8)

Procedure 3-3: NIC Configuration

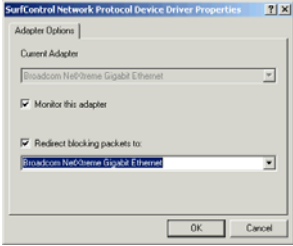
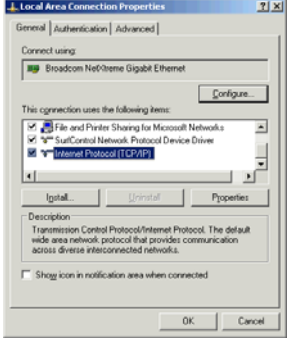
| Step | Action |
|------|--------|
|------|--------|

Single NIC configuration

| | | |
|---|--|--|
| 1 | Open the Properties dialog box for the Monitoring and Blocking NIC from your Network Connections (the one you bound to the Web Filter service in Procedure 2, Step 24.) | |
| 2 | Make sure all necessary components are checked (including the Internet Protocol and SurfControl Network Protocol Device Driver). Note: <i>the properties of the SurfControl Network Protocol Device Driver will only be available on those servers that have:</i> <ul style="list-style-type: none"> - 2 or more NICs - and the driver is bound to 2 NICs | |
| 3 | Open the Property dialog box for the SurfControl Network Protocol Device Driver. | |
| 4 | Make sure Monitor this adapter is selected; this indicates that this NIC is responsible for monitoring. | |
| 5 | Make sure Redirect blocking packets to is not selected; this indicates that the Monitor NIC is also responsible for blocking. | |
| 6 | Click OK to continue. | |
| 7 | Click OK to continue. | |
| Configure multiple NICs to monitor and block | | |
| 8 | Open the Properties dialog box for the Monitoring NIC (this is the NIC you bound to the Web Filter service). | |
| 9 | Clear all components (including Internet Protocol), except the SurfControl Network Protocol Device Driver. | |

(Sheet 1 of 2)

Procedure 3-3: NIC Configuration (Continued)

| Step | Action | |
|------|--|---|
| 10 | Open the Property dialog box for the SurfControl Network Protocol Device Driver. |  |
| 11 | Make sure Monitor this adapter is selected; this indicates that this NIC is responsible for monitoring. | |
| 12 | Make sure Redirect blocking packets to is selected and choose the blocking NIC from the drop-down list box. | |
| 13 | Click OK to continue. | |
| 14 | Click OK again to continue. | |
| 15 | Open the properties dialog box for the Blocking NIC. |  |
| 16 | Make sure Internet Protocol is selected. This NIC is also responsible for blocking, for performing all DNS queries, for transferring data to the database, and for receiving EUM data. | |
| 17 | Click OK to continue. | |



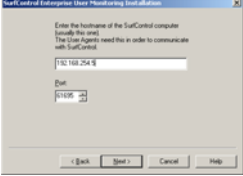
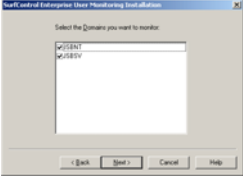
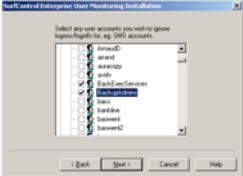
(Sheet 2 of 2)

Procedure 3-4: Installing EUM

| Step | Action |
|------|---|
| 1 | Make sure that the Web Filter server has a static IP address. |
| 2 | Make sure you have administrative privileges on all domain controllers where the User Agent will be installed. |
| 3 | Make sure the Web Filter server is located in the correct domain. |
| 4 | Make sure the firewall or router allows traffic through the provisioned port (default is 61695). |
| 5 | For Windows NT domain controllers, make sure the security logs of the domain controllers are set to overwrite events, as needed. |
| 6 | Try to perform this procedure when there are few or no users on the network, or when a forced logoff can be scheduled. This ensure the fastest, most accurate detection of users. |

(Sheet 1 of 3)

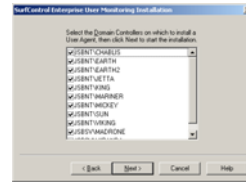
Procedure 3-4: Installing EUM (Continued)

| Step | Action | |
|---|--|---|
| Begin Installation | | |
| 7 | From the Start menu, launch EUM installation (Start > Programs > SurfControl Web Filter > Enterprise User Monitoring > Install Enterprise User Monitoring). |  |
| SurfControl Enterprise User Monitoring Installation screen | | |
| 8 | Click Next to start the installation. |  |
| Hostname screen | | |
| 9 | Enter the IP address of the Web Filter server. Note: <i>SurfControl recommends entering the IP address instead of the hostname.</i> |  |
| 10 | Enter the port the User Agent and the Web Filter service should use to communicate (the default is 61695). | |
| 11 | Click Next to continue. | |
| Domain List screen | | |
| 12 | Select the domains you want to receive user data from. |  |
| 13 | Click Next to continue. | |
| Ignore User Accounts screen | | |
| 14 | Select the user accounts whose logon/logoffs do not need to be reported, i.e. Systems Management Server (SMS) and antivirus accounts. |  |
| 15 | Click Next to continue. | |

(Sheet 2 of 3)

Procedure 3-4: Installing EUM (Continued)

| Step | Action |
|---|---|
| Select Domain Controllers screen | |
| 16 | <p>Select the domain controllers whose user's logon/logoff activity Web Filter needs to monitor (this identifies the domain controllers where the UA will be installed).</p> <p>Note: <i>Failure to install EUM on all domain controllers can compromise the accuracy of user name resolution. If a domain controller is authenticating users, but not passing that data to Web Filter, user activity may be recorded under another user name.</i></p> |
| 17 | Click Next to continue. |
| 18 | Installation onto Microsoft Windows 2000 domain controllers requires a reboot; SurfControl recommends performing a manual reboot. |
| 19 | You have successfully installed Enterprise User Monitoring. |
| (Sheet 3 of 3) | |



Procedure 3-5: Installing EUM on NetWare

| Step | Action |
|------|---|
| 1 | Ensure Novell Client 32 was installed on the Web Filter server prior to Web Filter installation. |
| 2 | From the Web Filter server, log on to the Novell server with administrative rights. |
| 3 | <p>Go to the SYS volume and create a directory (for example, nweum).</p> <p>Note: <i>When creating the directory, use DOS8.3 naming conventions.</i></p> |
| 4 | Under this directory, copy the files nweum.nlm and scua.ini from the Web Filter server (in a default installation they are located in C:\Program Files\SurfControl\Web Filter\Netware)to the Novell server. |
| 5 | <p>From the Netware Server console, load the NLM by typing:</p> <pre>Load sys:\nweum\nweum.nlm</pre> <p>and pressing enter</p> <p>Note: <i>The system will not allow you to load the NLM if a copy is already running.</i></p> |

Procedure 3-6: Automatically loading the NetWare EUM

| Step | Action |
|------|--|
| 1 | To automatically load the NetWare EUM every time the server is rebooted edit the <code>sys:\system\autoexec.ncf</code> file. |
| 2 | You can edit this file using any text editor from the workstation or from the Netware Server by typing: <code>Load edit sys:\system\autoexec.ncf</code> |
| 3 | Add the following line at the end of the file: <code>load sys:\nweum\nweum.nlm</code> |
| 4 | Save the file. |

Procedure 3-7: Unloading the NetWare EUM

| Step | Action |
|------|---|
| 1 | From the Netware Server console, type: <code>unload nweum.nlm</code> |


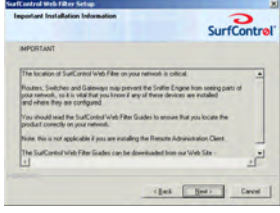

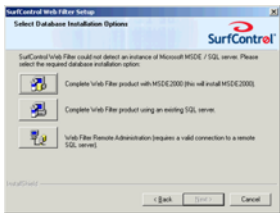
Procedure 3-8: Add Web Filter Servers to NetWare EUM

| Step | Action |
|------|--|
| 1 | Unload the Netware EUM as in Procedure 7. |
| 2 | Add the following details to the <code>surfcontrol_services</code> section of the <code>scua.ini</code> file The format should be: <code>machine_name_or_IP_Address=Port number</code> Note: <i>the default port number is 61696. 61695 is used by Win 2000/2003 EUM architecture.</i> |
| 3 | Save the <code>scua.ini</code> file. |
| 4 | Re-load the NetWare EUM as in Procedure 5. |

Procedure 3-9: Ignored users in NetWare EUM

| Step | Action |
|------|--|
| 1 | Unload the Netware EUM as in Procedure 7. |
| 2 | <p>Edit the [Ignored Users] section of the <code>scua.ini</code> file. The format for adding ignored users is as follows:</p> <pre>unique_user_key=fully_qualified_username_in_the_NDS_tree</pre> <p>For example:</p> <pre>user1=admin.NW_5_1_SURF user2=tester.accounting.NW_5_1_SURF</pre> |
| 3 | Save the <code>scua.ini</code> file. |
| 4 | Re-load the NetWare EUM as in Procedure 5. |

Procedure 3-10: Installing the Web Filter Administration client

| Step | Action | |
|---|---|--|
| 1 | Locate the downloaded SurfControl Web Filter file (setup.exe). | |
| 2 | Double-click setup.exe to start the installation process. | |
| 3 | The InstallShield Wizard loads. | |
| SurfControl Web Filter Setup screen | | |
| 4 | Welcome to SurfControl Web Filter. |  |
| 5 | Click Next to continue. | |
| Important Information screen | | |
| 6 | Click Next to continue. |  |
| License Agreement screen | | |
| 7 | Read the License Agreement. |  |
| 8 | Do you agree to the terms? <ul style="list-style-type: none"> Yes, select I accept...Click Next to continue. No, select I disagree...Click Cancel to exit the installation process. | |
| Select Database Installation Options | | |
| 9 | Select Web Filter Remote Administration . |  |

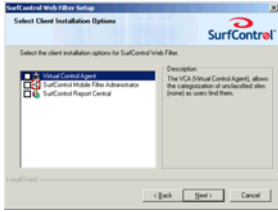
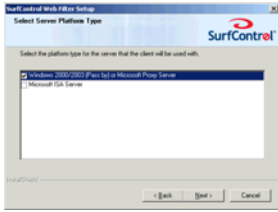


(Sheet 1 of 4)

Procedure 3-10: Installing the Web Filter Administration client

| Step | Action | |
|---|--|--|
| Setup Type | | |
| 10 | <p>Select the version of Web Filter you want to install: the options are:</p> <ul style="list-style-type: none"> SurfControl Web Filter SurfControl Mobile Filter <p>Note: <i>You need to have a fully licensed or evaluation copy within it's 30 day limit to install SurfControl Mobile Filter.</i></p> <p>You also have the option to install a version of Web Filter that meets legislation in some European countries that forbids user browsing details to be viewed without express management and union permission. Select this option if you wish to use this version of Web Filter. For more details see Chapter 5 - Privacy Edition of the <i>Administrator's Guide</i>.</p> | |
| 11 | Click Next to Continue. | |
| Customer Information screen | | |
| 12 | Enter a name into the User Name field. | |
| 13 | Enter your company's name into the Company Name Field. | |
| 14 | Enter the Serial Number for Web Filter and VCA, if available. If evaluating, leave these blank. You have 30 days to evaluate the product. | |
| 15 | Click Next to continue. | |
| Choose Destination Location screen | | |
| 16 | <p>Select the folder where Setup will install files. The default is:</p> <p>C:\Program Files\SurfControl\Web Filter.</p> <p>Choose another location by selecting Browse and navigating to a different location.</p> | |
| 17 | Click Next to continue. | |
| Setup Type screen | | |
| 18 | Select Remote Administration . | |
| 19 | Click Next to continue. | |


(Sheet 2 of 4)

Procedure 3-10: Installing the Web Filter Administration client

| Step | Action | |
|--|--|--|
| Select Client Installation Options screen | | |
| 20 | If you want to install VCA onto the Web Filter server, select Install Virtual Control Agent . Note: <i>SurfControl recommends installing VCA onto a different computer than the Web Filter server</i> |  |
| 21 | Select SurfControl Mobile Filter Administrator , if you want to be able to manage the Mobile Filter server from this computer. Note: <i>You must have the SurfControl Mobile Filter server installed on your network for the Administrator to work correctly.</i> | |
| 22 | If you want to install SurfControl Report Central, select Install SurfControl Web Filter Report Central . The installation of Report Central will start automatically after Web Filter has installed. | |
| 23 | Click Next to continue. | |
| Select Server Platform Type screen | | |
| 24 | Select Windows 2000/2003 (Pass by) or Microsoft Proxy Server . |  |
| 25 | Click Next to continue. | |
| Start Copying Files screen | | |
| 26 | Review your settings before starting the installation. |  |
| 27 | Click Next to continue. | |
| Setup Status screen | | |
| 28 | Web Filter is performing the requested operations. |  |
| 29 | | |




(Sheet 3 of 4)

Procedure 3-10: Installing the Web Filter Administration client




| Step | Action |
|--|---|
| InstallShield Wizard Complete screen | |
| 30 | Click Finish . |
|  | |
| 31 | You have successfully installed SurfControl Web Filter Administration client. |

(Sheet 4 of 4)

Procedure 3-11: Serializing SurfControl Web Filter

| Step | Action | |
|------|---|---|
| 1 | From the status area of the task bar, right-click the Web Filter icon  and select About . |  |
| 2 | Click Serialize . | |
| 3 | Enter your serial number. |  |
| 4 | Click OK to continue. | |
| 5 | You have successfully serialized SurfControl Web Filter. | |

Procedure 3-12: Serializing the VCA

| Step | Action | |
|------|--|---|
| 1 | From the Start menu, launch VCA (Start > Programs > SurfControl Web Filter > Virtual Control Agent). |  |
| 2 | From anywhere on the title bar, right-click and select About SurfControl Virtual Control Agent.... | |
| 3 | Click Serialize . |  |
| 4 | Enter the serial number. |  |
| 5 | Click OK to continue. | |
| 6 | You have successfully serialized the VCA. | |

ALLOCATING MEMORY TO THE TEMPDB TRANSACTION LOG FILE

When generating reports, SQL Server can run out of memory if the SQL Server tempDB transaction log does not have enough memory allocated to it. To allocate more memory, follow Procedure 3-13:

Procedure 3-13: Allocate more memory to tempDB Log File

| Step | Action |
|------|---|
| 1 | Launch SQL Server Enterprise Manager. |
| 2 | Select tempDB from the database list. |
| 3 | Right-click on tempDB and select Properties from the shortcut menu. The tempDB properties dialog box will display. |
| 4 | Select the Transaction Log tab. |
| 5 | Under Space Allocated (MB) enter a value of 15 or above. |
| 6 | Click OK to close the dialog box. |

REMOTE ACCESS TO REPORT CENTRAL

Users who do not have SurfControl Report Central installed can generate reports via remote access, without installing any software on their computers. You can give users remote access to Report Central by distributing the hyperlink as shown in Procedure 3-14.

SYSTEM REQUIREMENTS FOR REMOTE ACCESS

If a user wants to access Report Central remotely, their computer must meet the following system requirements.

Table 3-1 System Requirements for Remote Access

| Component | Minimum | Recommended |
|------------------------|--|-----------------------|
| Supported Web browsers | Internet Explorer 5.0 | Internet Explorer 6.0 |
| Applications | Adobe Reader 6.0 or later to read reports in PDF format. | |

To distribute the remote access shortcut, follow procedure Procedure 3-14:

| Procedure 3-14: Distributing the remote access shortcut | |
|---|--|
| Step | Action |
| 1 | From the Start menu navigate to Programs > SurfControl Report Central . |
| 2 | Right-click on Web Filter 5.0 Reports or Web Filter 5.0 Reports - Secure Connection (if you want to use Report Central via HTTPS) and select Send To from the menu. |
| 3 | Select Mail Recipient . |
| 4 | Your e-mail program (e.g. Microsoft Outlook) will open a new message. The body of the message will contain a link to Report Central. |
| 5 | Enter the e-mail addresses of the users you want to receive the link, and send the e-mail. |
| 6 | To use Report Central, users must have the Java Runtime Environment installed on their computer. If they do not have this component, they will be prompted to install it the first time they try to log on to Report Central. They should accept any requests to download and install files, and choose the Typical install option when asked. |
| 7 | Although you can send the remote access shortcut to many users at once, it is better to send it to one user at a time, along with their user name and password. see "Setting up Users" on page 118. of the Administrator's Guide for more details. |

You will need to re-send the remote access shortcut if you edit any of the following settings on the computer where Report Central is installed:

- IP address of host computer.
- Tomcat Web Server Port Number.