



Internet

**SurfControl Web Filter for  
Juniper Networks Security Devices**  
*Installation Guide*





## Notices

## NOTICES

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Was this guide helpful? E-mail us at [documentation@surfcontrol.com](mailto:documentation@surfcontrol.com) to suggest changes or make a correction.

April 2005

## TECHNICAL SUPPORT

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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.
- If your question or problem cannot be answered by the Top Issues or is not in the Knowledge Base, fill out an Online Support Request Form
- Telephone Support - If you would like to speak with a Technical Support Representative, our excellent SurfControl Technical Support is just a phone call away.

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## Chapter 1

## Introduction

SurfControl Web Filter  
System Requirements

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# SURFCONTROL WEB FILTER

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SurfControl Web Filter for Juniper Networks Security Devices:

- utilizes pass-through technology
- uses a proprietary SurfControl Content Filtering Protocol (SCFP) to communicate with the Juniper Networks Security Device.
- provides for flexible deployment.
- does not rely on existing network architecture.
- filters HTTP protocol only.
- is transparent to the end-user.

## PASS-THROUGH FILTERING TECHNOLOGY

Historically, pass-through technology was the first technology developed for Internet filtering. Filtering software is installed on a device at the choke point for all outbound and inbound traffic. The application works like customs: all packets are stopped and inspected before being allowed to enter the country. Only packets sent to an approved connection are allowed into the protected domain.

The inspection can be based on source or destination address, source or destination TCP ports, protocol, and others. Because this technology inspects every packet, you may see network latency. In most cases, the optimization of modern software and the availability of high performance hardware makes this latency negligible.

## SYSTEM REQUIREMENTS

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

**Table 1-1** System Requirements

	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	Ethernet card.	
Databases (with latest Service Packs)	MSDE 2000 or MS SQL Server 7 or MS SQL Server 2000 Note: SurfControl recommends that you have your MSDE or SQL server installed 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 to 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.	

## **SUPPORTED JUNIPER NETWORKS SECURITY DEVICES**

- NetScreen-5GT
- NetScreen-25
- NetScreen-50
- NetScreen-204
- NetScreen-208
- NetScreen-500
- NetScreen-5200
- NetScreen-5400



## Chapter 2 Installation decisions

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## INTRODUCTION

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

### Juniper Networks Security Device setup

- Juniper configuration pre Web Filter installation.
- Juniper configuration post Web Filter installation.

See “Juniper Device configuration” on page 7 for more details.

### Installation considerations

- Do you want to automatically monitor new users?
- 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 9 for more details.



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

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### 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 11 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 15 for more details.

### Other considerations

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

## JUNIPER DEVICE CONFIGURATION

Web Filter supports Juniper Networks Security Devices operating in any of its interface modes:

- Transparent Mode
- NAT mode
- Route Mode

SurfControl recommends performing some Juniper configuration before installing Web Filter and completing the configuration afterwards.



**Note:** For details on configuring your Juniper Networks Security Device, consult your Juniper Documentation.

## PRE WEB FILTER INSTALLATION CONFIGURATION

### Procedure 2-1: Enable URL Filtering Policy

Step	Action
1	From the Policies menu, select <b>Edit</b> from the <b>Configure</b> section of the <b>Trust to Untrust</b> Policy.
2	Select the <b>URL Filtering</b> checkbox.
3	Click <b>Apply</b> .

## POST WEB FILTER INSTALLATION CONFIGURATION

### Procedure 2-2: Enable Protocol

Step	Action
1	From the <b>Screening &gt; URL Filtering &gt; Protocol</b> menu, select <b>Protocol</b> .
2	Select the <b>Redirect to SurfControl</b> radio button.
3	Click <b>Apply</b> .
4	Select the <b>Websense/SurfControl</b> hyperlink at the top of the screen.
5	Make sure the <b>Enable URL Filtering</b> checkbox is selected.
6	From the Source Interface drop-down list, select <b>Default</b> .
7	Enter the IP address of the Web Filter server in the <b>Server Name</b> field.

(Sheet 1 of 2)

## Procedure 2-2: Enable Protocol (Continued)

Step	Action
8	Check the <b>Server Port</b> setting is 62252.
9	Check the <b>Communication Timeout</b> setting is 20 seconds.
10	Choose whether you want to <b>Block</b> or <b>Permit</b> all HTTP requests should the connection with the Web Filter server be lost.
11	Select <b>NetPartners WebSense/SurfControl</b> for the Blocked URL Message Type. See the <b>HTTP Deny Page</b> section of the <b>Rules Administrator</b> chapter of the <i>Administrator's Guide</i> for details of setting up a SurfControl Deny page.
12	Click <b>Apply</b> .

(Sheet 2 of 2)

## INSTALLATION CONSIDERATIONS

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

- Automatically Monitor New Users
- Enable User name Support
- Install Virtual Control Agent
- Install SurfControl Report Central

### AUTOMATICALLY MONITOR NEW USERS

Each time Web Filter detects a request from a workstation it hasn't seen before, it adds the workstation's data to the database and attempts to identify the real name of the workstation and the name of the user logged into that PC.

By choosing the Automatically Monitor New Users option during installation, Web Filter automatically monitors HTTP traffic for all users.

If unchecked, Web Filter builds a user list (for use in creating rules), but does not monitor any users.

### 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. For Juniper Networks Security Devices the Enterprise User Monitor (EUM) utility must be used. See "EUM" on page 12 for more details.



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

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## 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

	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.

## 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 on a secure environment.

## USER NAME RESOLUTION

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SurfControl Web Filter for Juniper Networks Security Devices resolves user names via the **Enterprise User Monitor (EUM)** utility. In a NETWARE environment you also have the option to monitor Novell User Names.

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 Workstation ID.
- 4 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.

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).

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.

see “Installing EUM” on page 38. for details on how to install EUM.

## 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.



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**Warning:** Web Filter does not support Novell 4.x. If you need to resolve Novell4.x users, authenticate all users on an NT or 2000 domain controller and use EUM to resolve the user names.

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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 41 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 15 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](http://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 full SQL installation on a dedicated SQL server.

## SQL SERVER

If you have a Microsoft SQL Server database 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 a SQL Server database, but have not installed it, complete the following tasks before 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.



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

- 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 SQL7.0 and SQL2000. 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

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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:

- 45 well-organized categories.
- over 8 million sites, including more than 1.5 billion web pages.
- international content, including 70 languages and over 200 countries.
- daily updates (more than 35,000 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.
- **Catch up mode notifications** - if Web Filter enters catch-up mode 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 that 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.
- start and stop the Web Filter Service.
- start and stop the Scheduler Service.
- access the Real-Time Monitor.
- set up scheduled events.

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 2000 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

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



## Chapter 3 Installation order

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## INTRODUCTION

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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 SQL7.0 or SQL2000 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 sections contains the following procedures:

- 1 Installing MSDE (optional). See Procedure 3-1:
- 2 Installing Web Filter. See Procedure 3-2:
- 3 Installing EUM (optional). See Procedure 3-3:
- 4 Installing NetwareEUM (optional). See Procedure 3-4:
- 5 Automatically loading NLM (optional). See Procedure 3-5:
- 6 Unloading NLM (optional). See Procedure 3-6:
- 7 Add Web Filter servers to NetWare EUM. See Procedure 3-7:
- 8 Ignored users in NetWare EUM. See Procedure 3-8:
- 9 Installing the Web Filter Administration client and VCA. See Procedure 3-9:
- 10 Serializing Web Filter. See Procedure 3-10:
- 11 Serializing the VCA. See Procedure 3-11:

You can cancel the installation of Web Filter at anytime 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:

- Web Filter 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)
  - SurfControl Content Filtering Protocol (SCFP)

### 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 <a href="http://www.surfcontrol.com">www.surfcontrol.com</a> from the <b>Downloads &gt; Free Trial of SurfControl &gt; Web Filter</b> 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.

# 3 INSTALLATION ORDER

## Introduction

Figure 1 shows the installation steps; this assumes that you have installed MSDE or SQL Server prior to Web Filter.

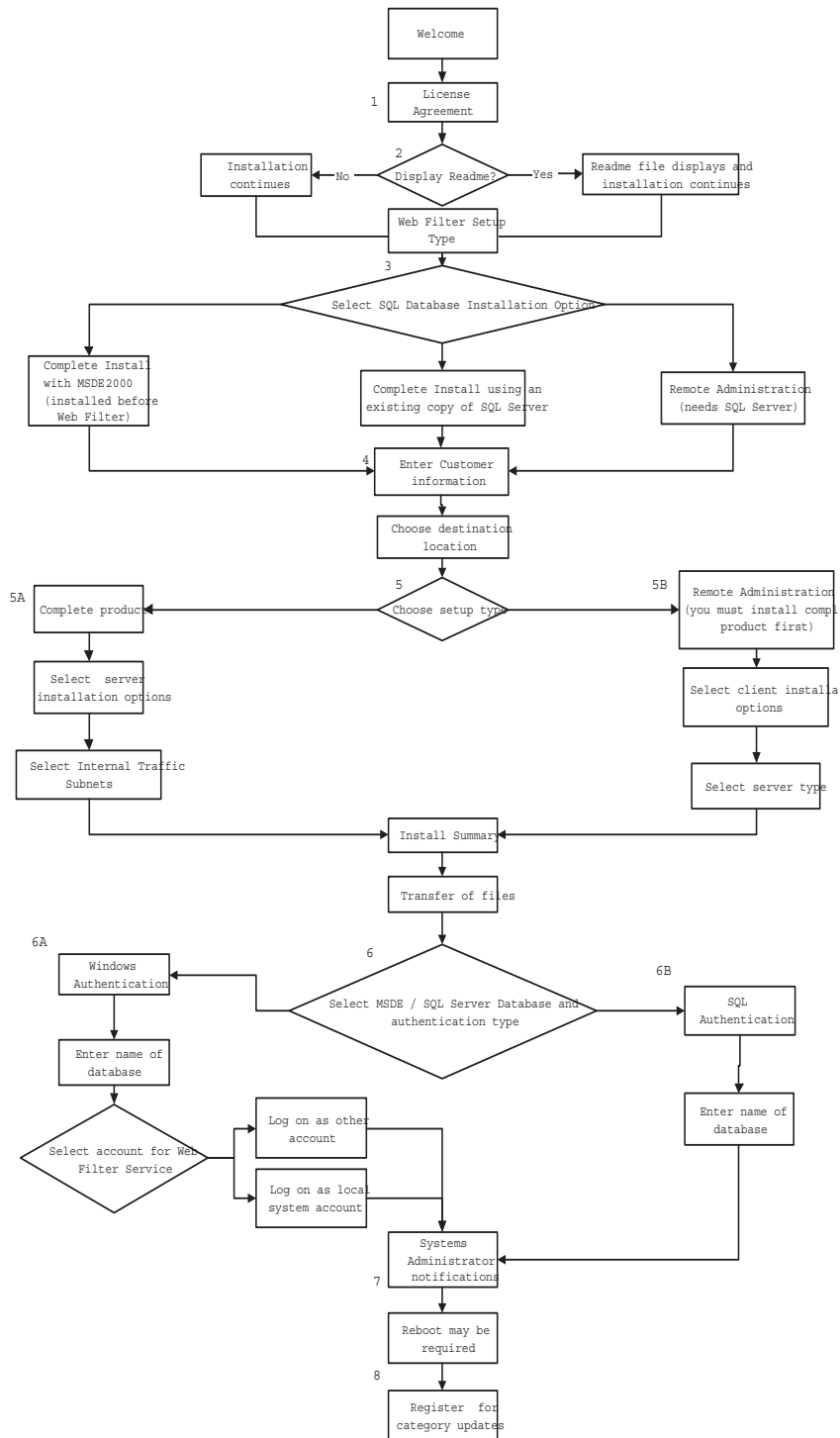
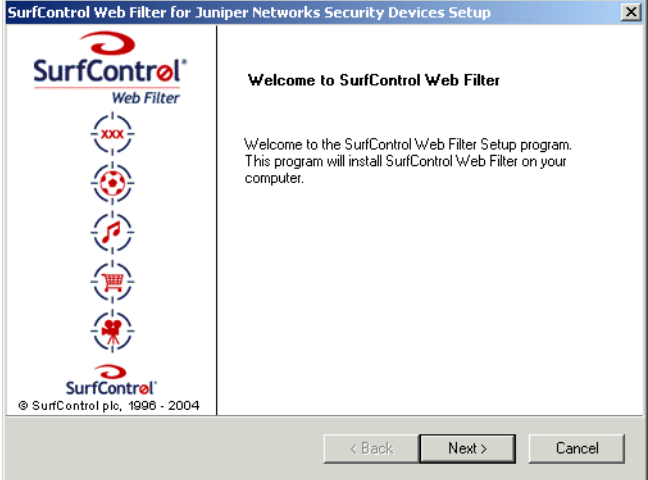
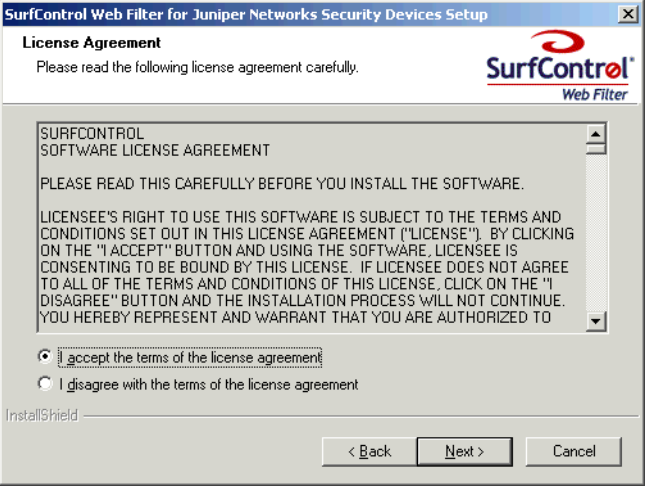
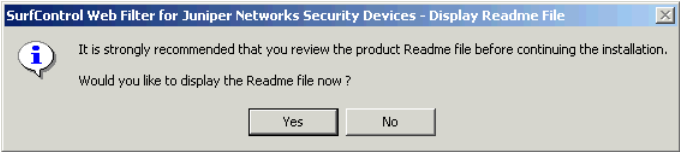


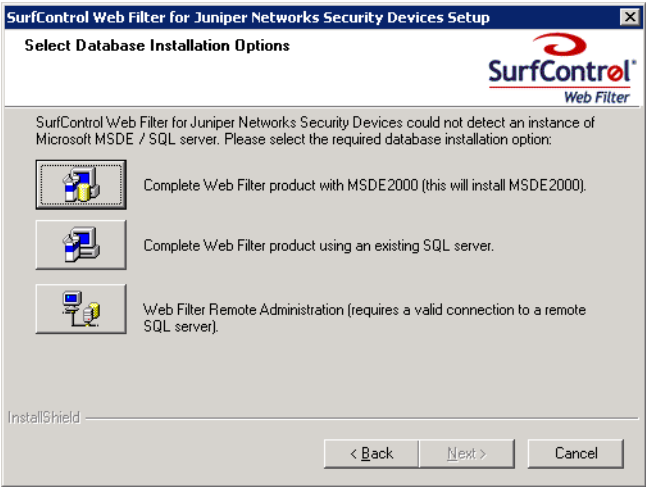

Figure 3-1 Installation flow

## Procedure 3-2: Installing SurfControl Web Filter

Step	Action	
1	Locate the downloaded SurfControl Web Filter executable file ( <code>setup.exe</code> )	
2	Double-click <code>setup.exe</code> to start the installation process.	
3	The InstallShield Wizard loads.	
<b>SurfControl Web Filter Setup</b>		
4	Welcome to SurfControl Web Filter	
5	Click <b>Next</b> to continue.	
<b>License Agreement</b>		
6	Read the License Agreement	
7	Do you agree to the terms? <ul style="list-style-type: none"> <li>• Yes, select <b>I accept...</b>Click <b>Next</b> to continue.</li> <li>• No, select <b>I disagree...</b>Click <b>Cancel</b> to exit the installation process.</li> </ul>	
<b>Display Readme File</b>		
8	SurfControl recommends you view the readme file. Click <b>Yes</b> to open the file. Click <b>No</b> to continue the install process.	

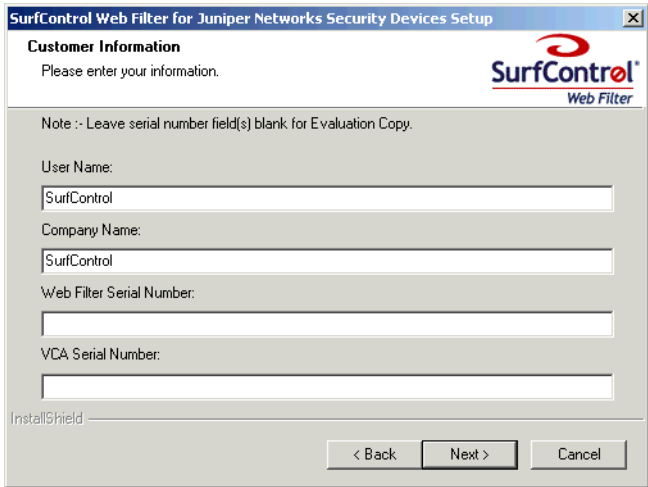
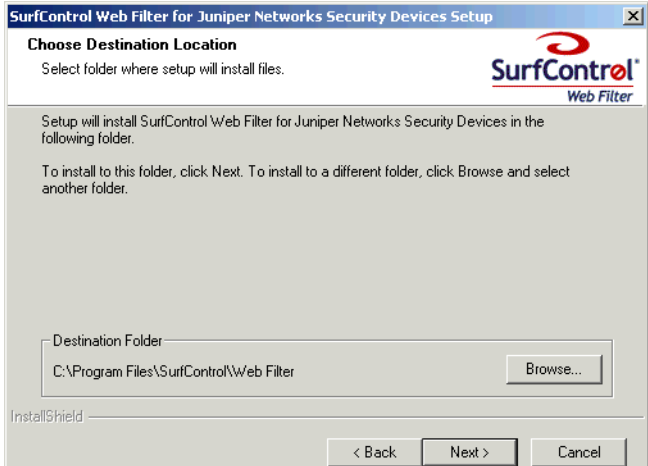
(Sheet 1 of 11)

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

		Action
		<b>Select Database Installation Options</b>
9	<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"> <li>• Install the complete product which will also install MSDE2000.</li> <li>• Install the complete product using an existing SQL Server database.</li> <li>• Install the Remote Administration version of Web Filter.</li> </ul> <p><b>Note:</b> <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>	
10	Click <b>Next</b> to continue.	
		<b>Setup Type</b>
11	<p>You 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>	
12	Click <b>Next</b> to Continue.	

(Sheet 2 of 11)

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

Action	
<b>Customer Information</b>	
13	Enter a name into the User Name field.
14	Enter your company's name in the Company Name field.
15	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.
16	Click <b>Next</b> to continue.
	
<b>Choose Destination Location</b>	
17	<p>Select the folder where setup will install files. The default is:</p> <p><b>C:\Program Files\SurfControl\Web Filter.</b></p> <p>Choose another location by selecting <b>Browse</b> and navigating to a different location.</p>
18	Click <b>Next</b> to continue.
	

(Sheet 3 of 11)

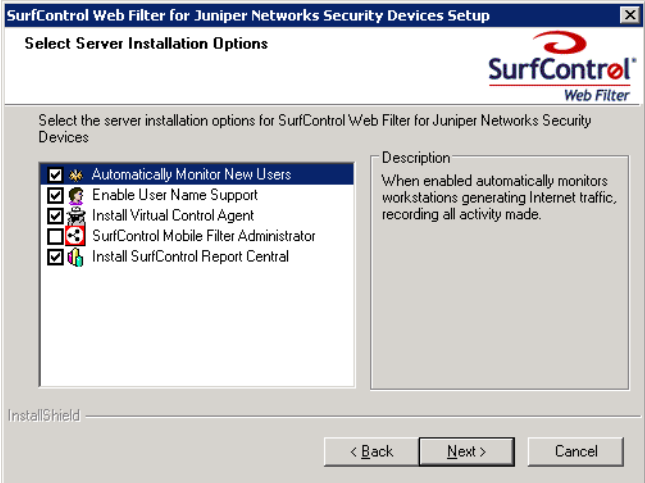
## Procedure 3-2: Installing SurfControl Web Filter (Continued)

Action	
<b>Setup Type</b>	
19	Select <b>Complete Product</b> .
20	Click <b>Next</b> to continue.

The screenshot shows a Windows-style dialog box titled "SurfControl Web Filter for Juniper Networks Security Devices Setup". The main heading is "Setup Type". Below this, there is a list box with two items: "Complete Product" (which is selected and highlighted in blue) and "Remote Administration". To the right of the list box is a "Description" area containing the text: "Installs the complete Web Filter product to allow the implementation and administration of your Internet Acceptable Use Policy." At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner of the dialog area.

(Sheet 4 of 11)

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

Step	Action	
<b>Select Server Installation Options</b>		
21	If you want Web Filter to automatically monitor new users (recommended), select <b>Automatically Monitor New Users</b> .	
22	If you want Web Filter to attempt to resolve user names based on the requesting IP address, select <b>Enable User Name Support</b> .	
23	If you want to install VCA onto the Web Filter server, select <b>Install Virtual Control Agent</b> . <i>Note: SurfControl recommends installing VCA onto a different computer than the Web Filter server.</i>	
24	Select <b>SurfControl Mobile Filter Administrator</b> , if you want to be able to manage the Mobile Filter server from this computer. <i>Note: you must have the SurfControl Mobile Filter server installed on your network for the Administrator to work correctly.</i>	
25	If you want to install SurfControl Report Central, select <b>Install SurfControl Web Filter Report Central</b> . The installation of Report Central will start automatically after Web Filter has installed.	
26	Click <b>Next</b> to continue.	

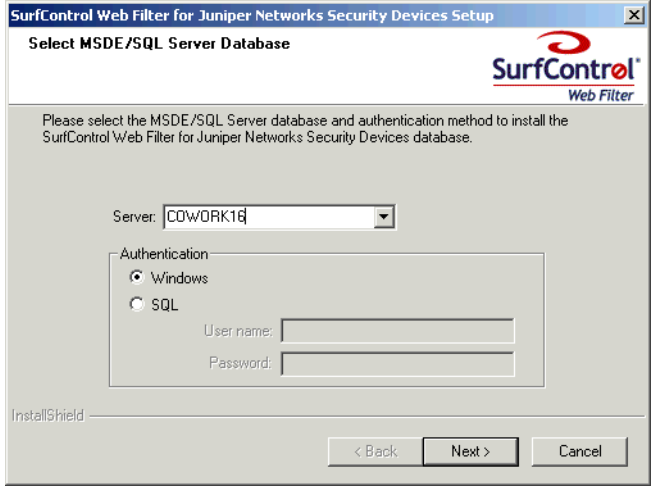
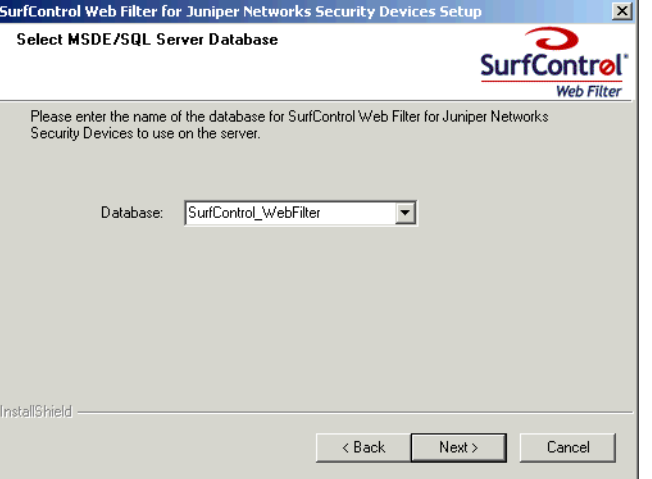
(Sheet 5 of 11)

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

Action		
<b>Start Copying Files</b>		
27	Review your settings before starting the installation.	
28	Click <b>Next</b> to continue.	
<b>Setup Status</b>		
29	Web Filter Setup is performing the requested operations.	

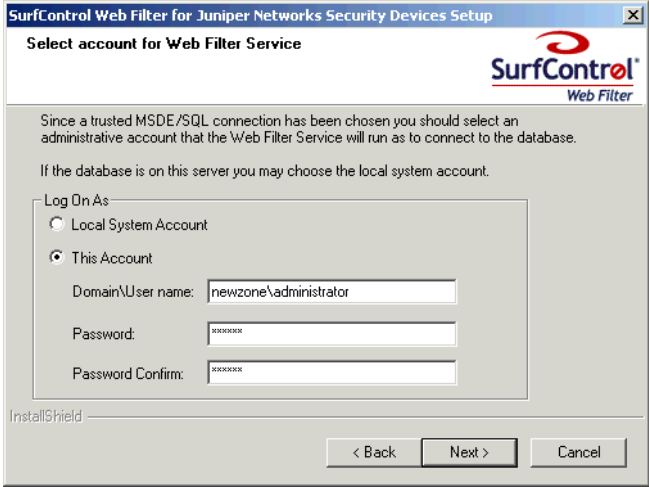
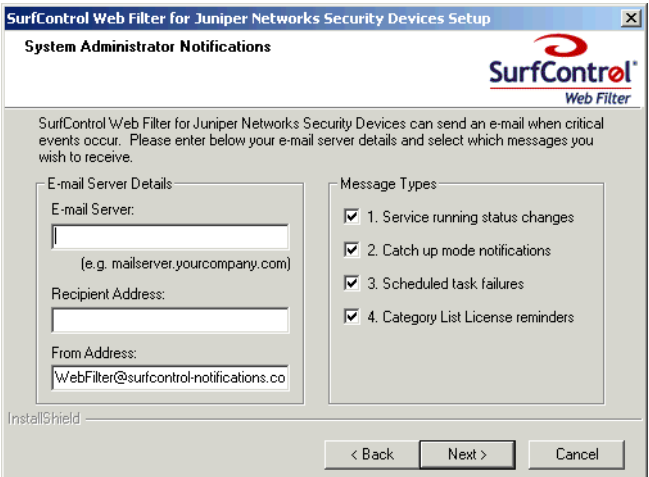
(Sheet 6 of 11)

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

Step	Action	
<b>Select MSDE/SQL Server Database</b>		
30	From the drop-down list, select the server where the SQL database is running. You can also enter the name or IP address of a server here.	
31	Select the Authentication method. <b>Note:</b> <i>SurfControl recommends using Windows authentication.</i>  <b>Note:</b> <i>If you choose Windows authentication, both the Web Filter server and the SQL server must be members of the same domain.</i>	
32	Click <b>Next</b> to continue.	
<b>Select MSDE/SQL Server Database</b>		
33	Choose the database you want to create. <b>Note:</b> <i>In most cases, you should use the default database (SurfControl_WebFilter); you can enter a new name, if necessary.</i>	
34	Click <b>Next</b> to continue.	
35	Did you choose Windows Authentication in Step 28? If yes, go to Step 36. If no, go to step 38.	

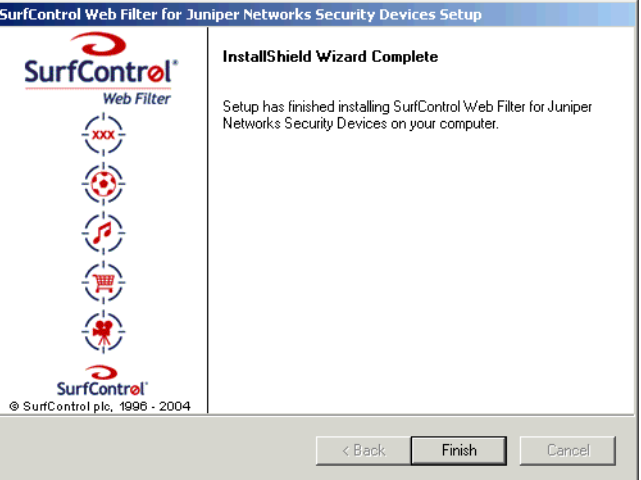

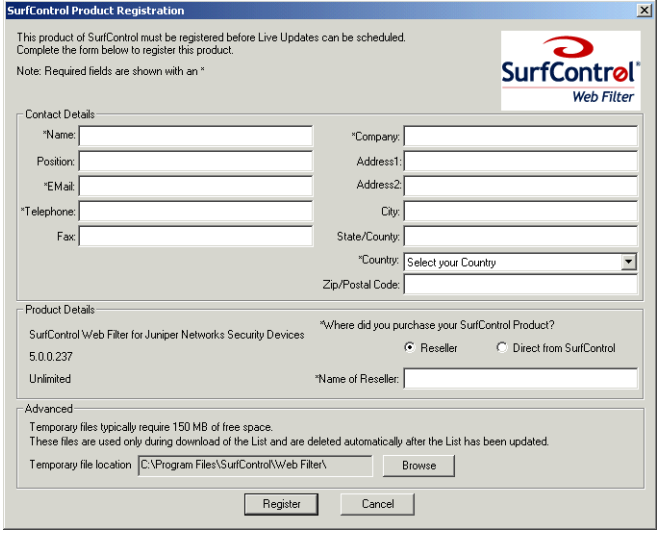
(Sheet 7 of 11)

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

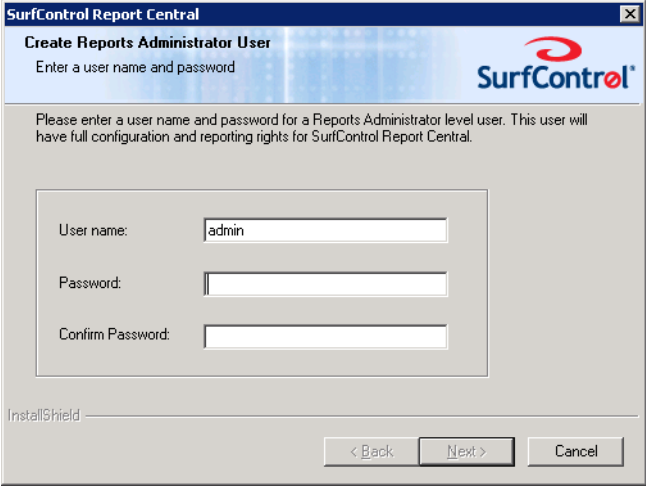
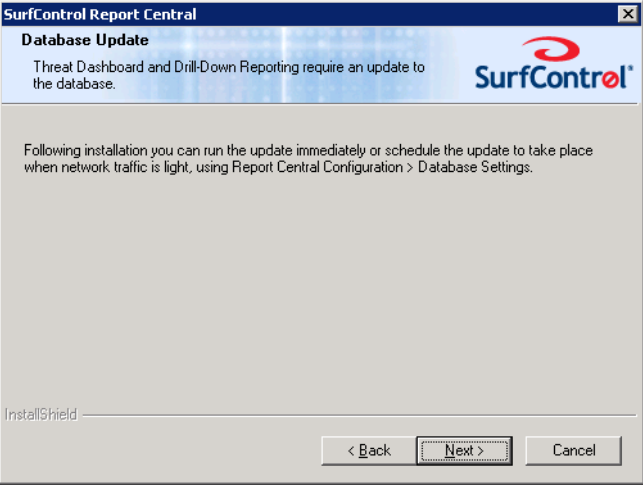
Step	Action	
<h3>Select account for Web Filter Service</h3>		
36	Choose the account you want to Web Filter to use when connecting to the database.  If the database is stored on the Web Filter server, you can use the Local System Account to connect to the database.  If the database is stored on a remote server, you should use a domain account to connect to the database.	
37	Click <b>Next</b> to continue.	
<h3>System Administrator Notifications</h3>		
38	Enter the e-mail server name or IP address.	
39	Enter the recipient's e-mail address.	
40	Enter the 'from' e-mail address (using the default address supplied is suitable).	
41	Choose the types of notification you want to receive.	
42	Click <b>Next</b> to continue.  <b>Note:</b> 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.	

(Sheet 8 of 11)

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

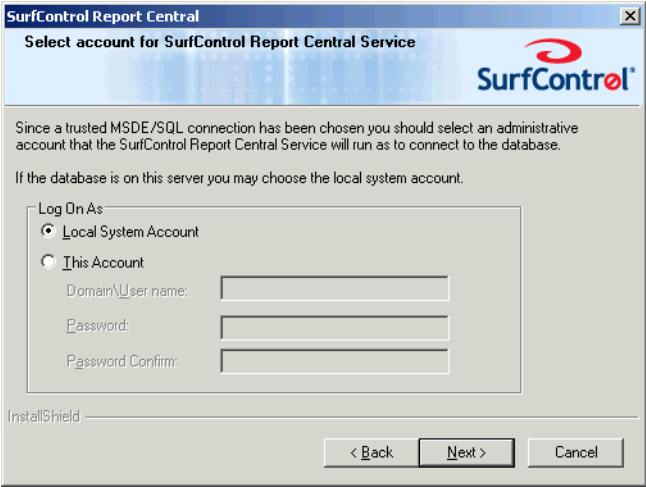
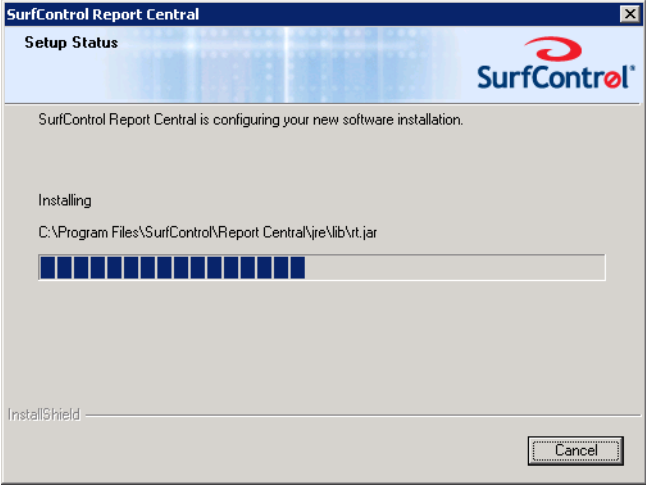
Step	Action	
<p><b>InstallShield Wizard Complete</b></p>		
43	<p>Click <b>Finish</b>. You may be asked to perform a reboot of your computer. Select <b>Reboot now</b>.</p>	
<p><b>Information</b></p>		
44	<p>Following the reboot, you will now be asked to complete your registration details for URL Category List Updates.</p>	
45	<p>Click <b>OK</b>.</p>	
<p><b>SurfControl Product Registration</b></p>		
46	<p>Complete the form. The fields marked * must be completed.</p>	
47	<p>Click <b>Register</b>.</p> <p>This registers your software with SurfControl and creates a scheduled event for automatically updating the URL Category List.</p>	
48	<p>You have successfully installed SurfControl Web Filter.</p>	
<p><b>SurfControl Report Central installation</b></p>		
<p>(Sheet 9 of 11)</p>		

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

Step	Action	
49	The installation of Report Central will now start.	
<b>SurfControl Report Central Report Administrator setup</b>		
50	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 <b>User name</b> and a <b>Password</b> , which you need to confirm.	
51	Click <b>Next</b> to continue.	
<b>Report Central Database update</b>		
52	For Report Central to give accurate results, its database needs to be updated before reports are run. You can perform this from the <b>Configuration &gt; Database Connection &gt; Update Tasks</b> tab from Report Central.	
53	Click <b>Next</b> to continue.	
54	Did you choose Windows Authentication to connect to a SQL Server database?  If Yes go to Step 55.  If No go to Step 57.	



(Sheet 10 of 11)

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

Action	
<b>Select Account for SurfControl Report Central Service</b>	
55	Choose the domain account you want Report Central to use when connecting to the remote SQL Server database when using Windows Authentication.
56	Click <b>Next</b> to continue.
	
<b>Setup Status</b>	
57	Report Central is performing the requested operations. <b>Note:</b> <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>
	
58	You have successfully installed SurfControl Web Filter and Report Central.

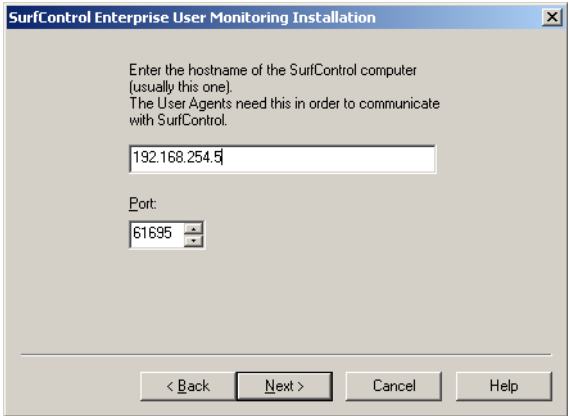
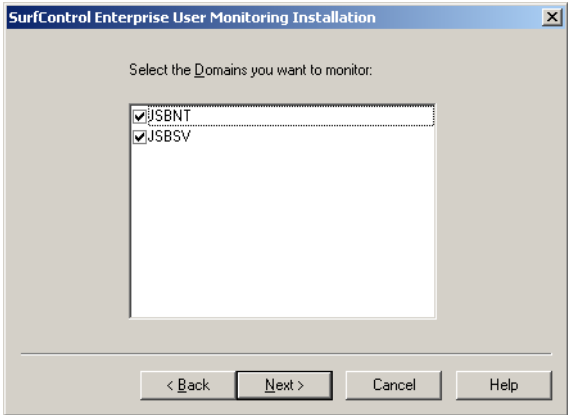
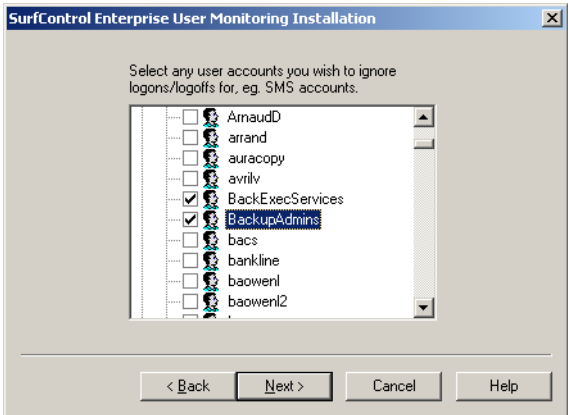
(Sheet 11 of 11)

## Procedure 3-3: 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.	
<b>Begin Installation</b>		
7	From the Start menu, launch EUM installation ( <b>Start &gt; Programs &gt; SurfControl Web Filter &gt; Enterprise User Monitoring &gt; Install Enterprise User Monitoring</b> ).	
<b>Installation screen</b>		
8	Click <b>Next</b> to start the installation.	

(Sheet 1 of 3)

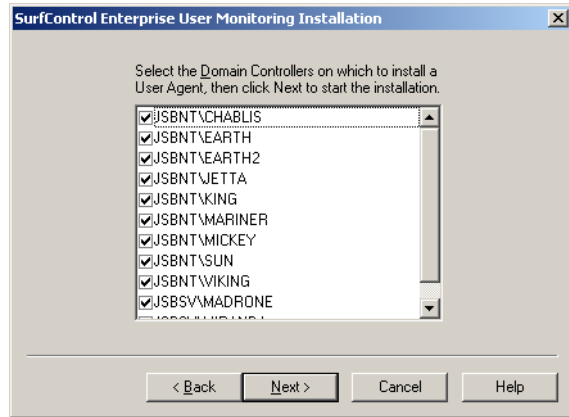
### Procedure 3-3: Installing EUM (Continued)

Step	Action	
<b>Hostname screen</b>		
9	Enter the IP address of the Web Filter server. <b>Note:</b> <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 <b>Next</b> to continue.	
<b>Domain List screen</b>		
12	Select the domains you want to receive user data from.	
13	Click <b>Next</b> to continue.	
<b>Ignore User Accounts screen</b>		
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 <b>Next</b> to continue.	

(Sheet 2 of 3)

## Procedure 3-3: Installing EUM (Continued)

Step	Action
<b>Select Domain Controllers screen</b>	
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><b>Note:</b> <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 <b>Next</b> 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.



## Procedure 3-4: 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><b>Note:</b> <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 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><b>Note:</b> <i>The system will not allow you to load the NLM if a copy is already running.</i></p>

### Procedure 3-5: 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 3-6: Unloading the NetWare EUM

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


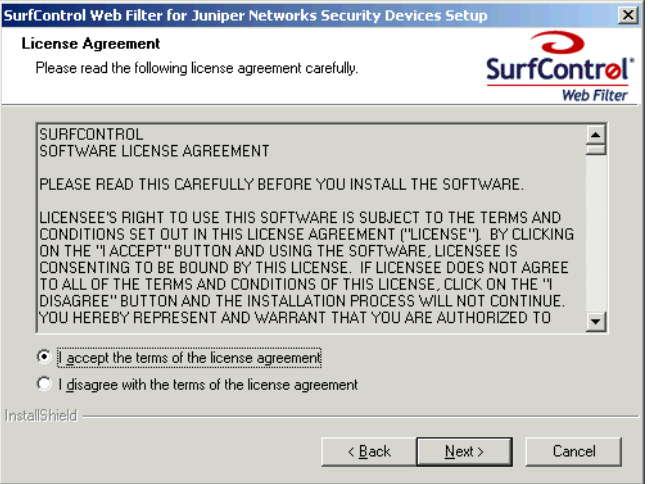
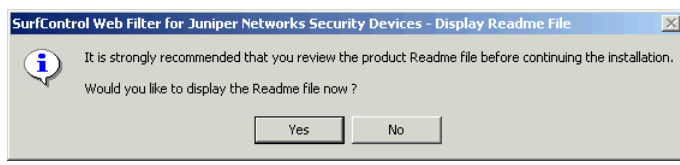
### Procedure 3-7: Add Web Filter Servers to NetWare EUM

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> <b>Note:</b> <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 3-8: Ignored users in NetWare EUM**

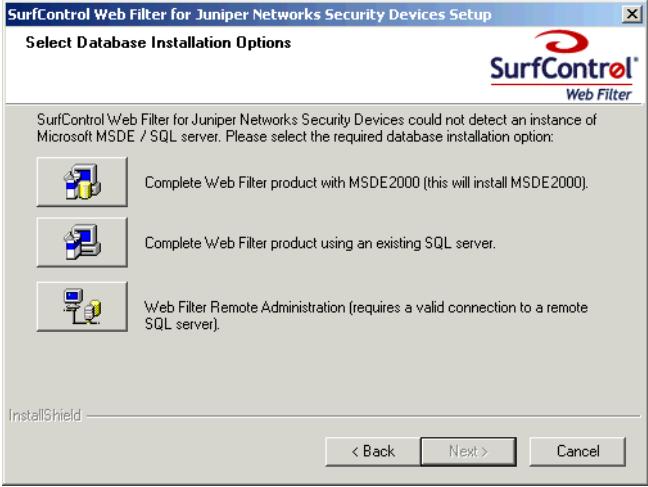
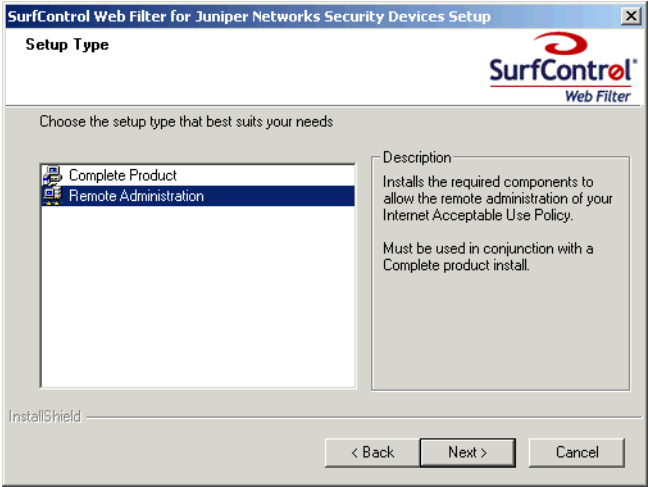
Step	Action
1	Unload the Netware EUM as in Procedure 7.
2	<p>Edit the [Ignored Users] section of the <code>squa.ini</code> file. The format for adding ignored users is as follows:</p> <pre>unique_user_key=fully_qualified_username_in_the_NDS_tree</pre> <p>For example:</p> <pre>user1=admin.NW_5_1_SURF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

### Procedure 3-9: Installing the Web Filter Administration client

¶	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.	
<b>SurfControl Web Filter Setup screen</b>		
4	Welcome to SurfControl Web Filter.	
5	Click <b>Next</b> to continue.	
<b>License Agreement screen</b>		
6	Read the License Agreement.	
7	Do you agree to the terms? <ul style="list-style-type: none"> <li>• Yes, select <b>I accept...</b>Click <b>Next</b> to continue.</li> <li>• No, select <b>I disagree...</b>Click <b>Cancel</b> to exit the installation process.</li> </ul>	
<b>Display Readme File</b>		
8	SurfControl recommends you view the readme file. Click <b>Yes</b> to open the file. Click <b>Next</b> to continue after viewing the readme.	

(Sheet 1 of 6)

## Procedure 3-9: Installing the Web Filter Administration client

Action	
<b>Select Database Installation Options</b>	
9	Select the <b>Web Filter Remote Administration</b> (requires a valid connection to a remote SQL server).
0	Click <b>Next</b> to continue.
	
<b>Setup Type</b>	
1	Select <b>Remote Administration</b> .
2	Click <b>Next</b> to continue.
	

(Sheet 2 of 6)

## Procedure 3-9: Installing the Web Filter Administration client

### 6 Action

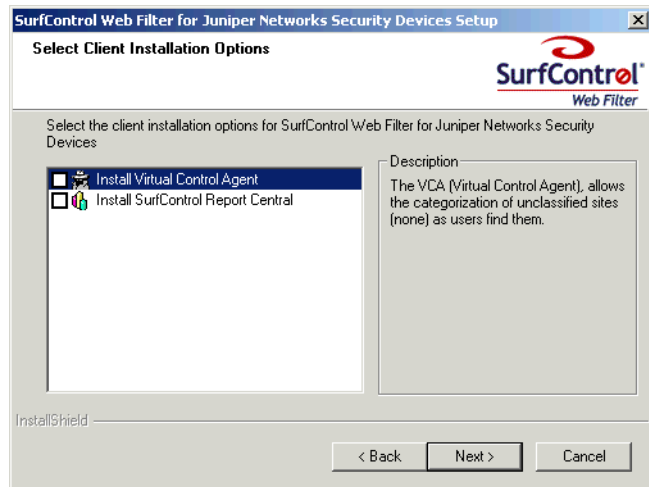
#### Select Client Installation Options

**3** If you want to install VCA onto the Web Filter server, select Install Virtual Control Agent.

**Note:** *SurfControl recommends installing VCA onto a different computer than the Web Filter server*

**4** If you want to install SurfControl Report Central, select **Install SurfControl Web Filter Report Central**. The installation of Report Central will start automatically after the remote client has installed.

**5** Click **Next** to continue.



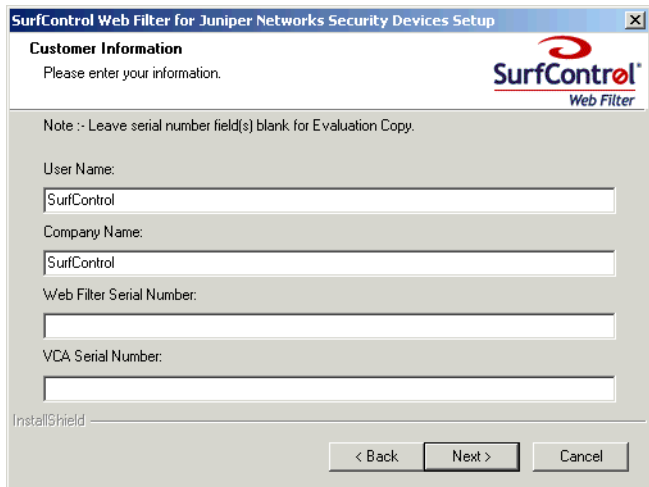
#### Customer Information

**6** Enter a name into the User Name field.

**7** Enter your company's name into the Company Name Field.

**8** Enter the Serial Number for Web Filter and VCA, if available. If evaluating, leave these blank. You have 30 days to evaluate the product.

**9** Click **Next** to continue.



(Sheet 3 of 6)

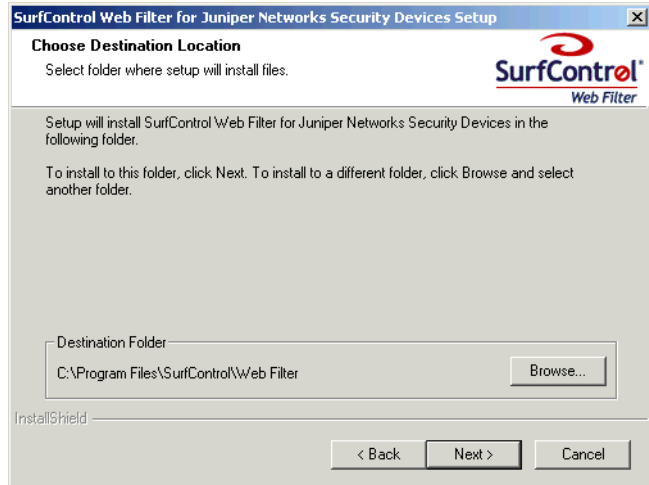
## Procedure 3-9: Installing the Web Filter Administration client

### 6 Action

#### Choose Destination Location

0 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.

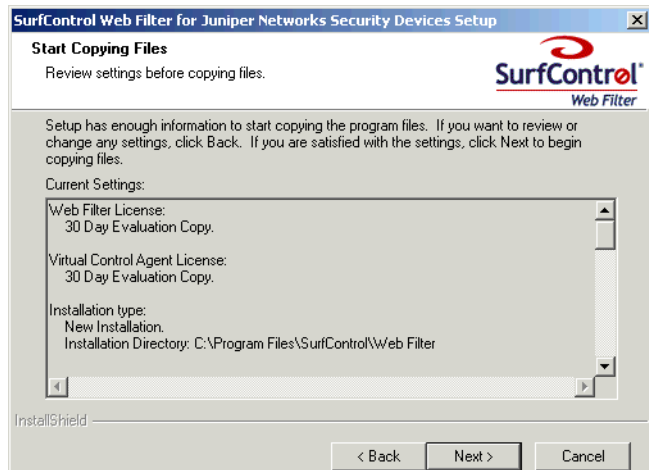
2 Click **Next** to continue.



#### Start Copying Files

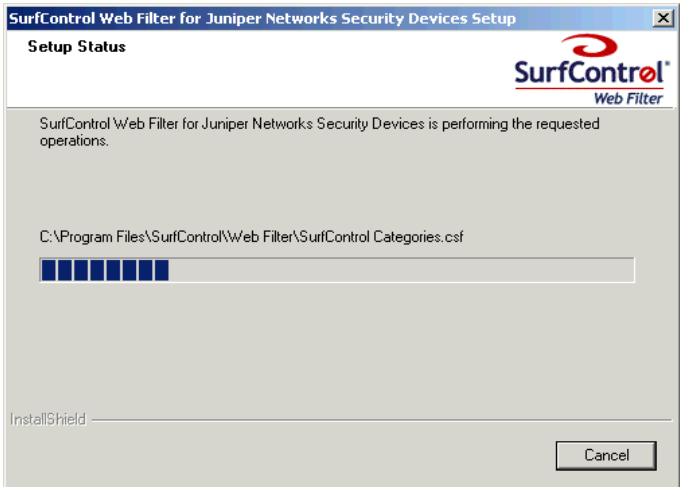
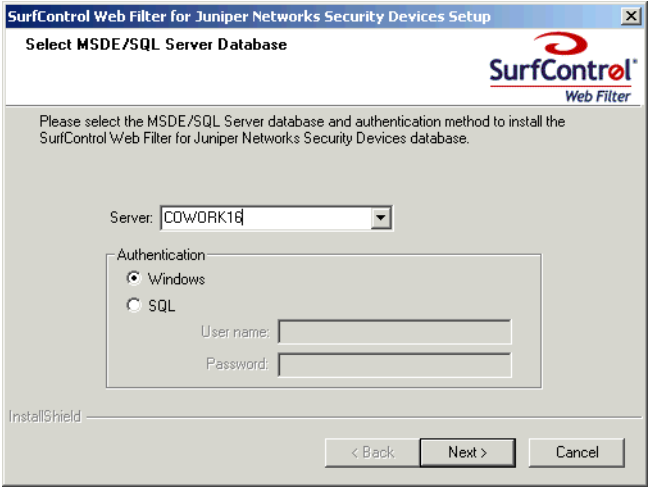
2 Review your settings before starting the installation.

2 Click **Next** to continue.



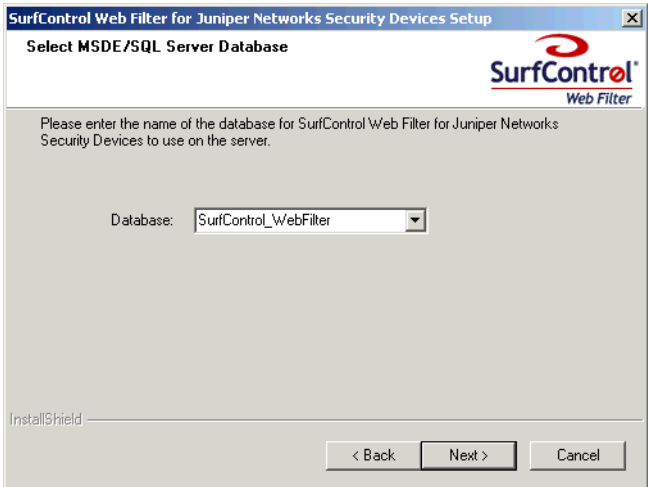
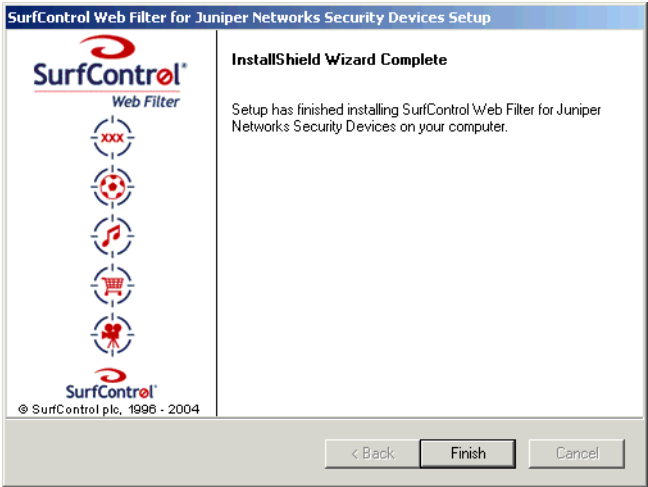
(Sheet 4 of 6)

### Procedure 3-9: Installing the Web Filter Administration client

Action	
<b>Setup Status</b>	
4	Web Filter is performing the requested operations.
	
<b>Select MSDE/SQL Server Database</b>	
2	Choose the server where the existing database is located.
3	Select the Authentication method. <i>Note: SurfControl recommends using Windows authentication. If you choose Windows Authentication, both the Web Filter server and the SQL server must be members of the same domain.</i>
2	Click Next to continue.
	


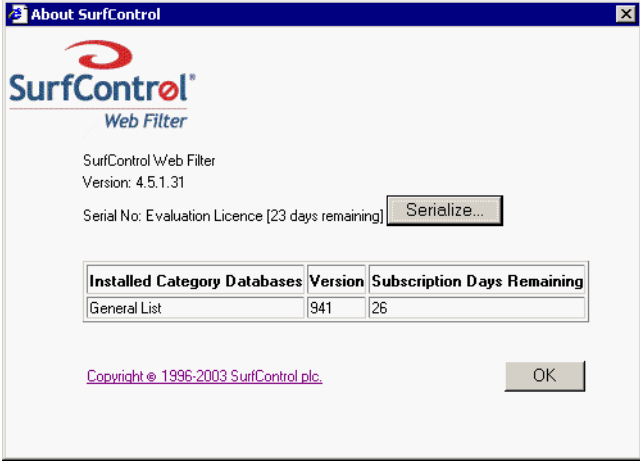
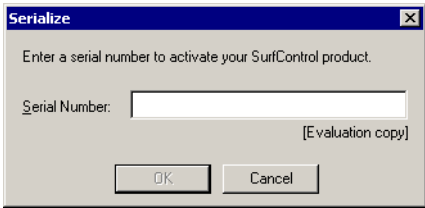
(Sheet 5 of 6)

### Procedure 3-9: Installing the Web Filter Administration client


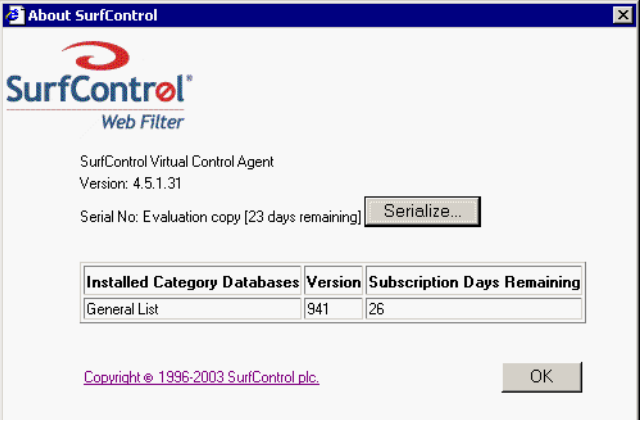
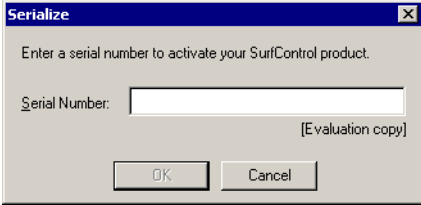
Action	
<b>Select MSDE/SQL Server Database</b>	
8	Choose an existing database that you want to access.
9	Click <b>Next</b> to continue.
	
<b>InstallShield Wizard Complete</b>	
8	Click <b>Finish</b> .
	
3	You have successfully installed SurfControl Web Filter Administration client.

(Sheet 6 of 6)

### Procedure 3-10: Serializing SurfControl Web Filter

Step	Action							
1	From the status area of the task bar, right-click the Web Filter icon  and select <b>About</b> .	 <table border="1"> <thead> <tr> <th>Installed Category Databases</th> <th>Version</th> <th>Subscription Days Remaining</th> </tr> </thead> <tbody> <tr> <td>General List</td> <td>941</td> <td>26</td> </tr> </tbody> </table>	Installed Category Databases	Version	Subscription Days Remaining	General List	941	26
Installed Category Databases	Version		Subscription Days Remaining					
General List	941	26						
2	Click <b>Serialize</b> .							
3	Enter your serial number.							
4	Click <b>OK</b> to continue.							
5	You have successfully serialized SurfControl Web Filter.							

### Procedure 3-11: Serializing the VCA

Step	Action	
1	From the Start menu, launch VCA ( <b>Start &gt; Programs &gt; SurfControl Web Filter &gt; Virtual Control Agent</b> ).	
2	From anywhere on the title bar, right-click and select <b>About SurfControl Virtual Control Agent...</b>	
3	Click <b>Serialize</b> .	
4	Enter the serial number.	
5	Click <b>OK</b> 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 3-12:

### Procedure 3-12: Allocate more memory to tempDB Log File

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

## REMOTE ACCESS

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 16.

### 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

	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 3-13.

#### Procedure 3-13: Distributing the remote access shortcut

Step	Action
1	From the Start menu navigate to <b>Programs &gt; SurfControl Report Central</b> .
2	Right-click on <b>Web Filter 5.0 Reports</b> or <b>Web Filter 5.0 Reports - Secure Connection</b> (if you want to use Report Central via HTTPS) and select <b>Send To</b> from the menu.
3	Select <b>Mail Recipient</b> .
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.