



# E-mail Filter

Version 5.2.1

## SurfControl E-mail Filter for SMTP *Installation Guide*

Enterprise Threat Protection™



## NOTICES

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June 2006

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

## TECHNICAL SUPPORT

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You can find the following information on the Technical Support Web pages:

- Read the Top Issues – This page has a quick list that covers the most common support issues encountered with SurfControl products.
- Search our Knowledge Base – Our constantly updated Knowledge Base contains articles, FAQs and glossary items to answer your questions about all SurfControl products.  
<http://kb.surfcontrol.com>
- If your question or problem cannot be answered by the Top Issues or is not in the Knowledge Base, complete an Online Support Request Form.
- Telephone Support numbers – If you would like to speak with a Technical Support Representative, our excellent SurfControl Technical Support is just a phone call away.

## **SURFCONTROL SALES**

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For product and pricing information, or to place an order, contact SurfControl. To find your nearest SurfControl office, please visit our Website.

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## Chapter 1

## Introduction

About SurfControl E-mail Filter  
New Features in Version 5.2

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## ABOUT SURFCONTROL E-MAIL FILTER

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SurfControl E-mail Filter is a complete filtering solution that enables you to automatically and intelligently manage your organization's use of e-mail and enforce your Acceptable Use Policy. By managing e-mail traffic, you can significantly reduce the risks to productivity, network resources, legal liability and security.

## ABOUT THIS GUIDE

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This Guide outlines the basic processes for installing SurfControl E-mail Filter. To filter e-mail correctly, it is essential that you configure the product once you have installed it. For detailed guidance on how to configure E-mail Filter for the best results, see the *SurfControl E-mail Filter Administrator's Guide*.

If you are deploying E-mail Filter in a multi-server environment, you need to ensure that E-mail Filter is correctly positioned for your system configuration. See the *SurfControl E-mail Filter Deployment Guide* on the SurfControl Web site:

[http://www.surfcontrol.com/general/assets/whitepapers/deploy\\_sef.pdf](http://www.surfcontrol.com/general/assets/whitepapers/deploy_sef.pdf)

# NEW FEATURES IN VERSION 5.2

Table 1-1 describe the advancements in functionality that version 5.2 delivers.

**Table 1-1** New Features in Version 5.2

Feature	What it does
<b>Improved Security</b>	
Transport Layer Security (TLS)	Provides secure communications on the Internet by using cryptography. Authenticates the server, and prevents eavesdropping, tampering and message forgery between mail servers/Message Transfer Applications (MTAs).
<b>Spam Protection</b>	
Sender Policy Framework (SPF)	Targets e-mail spam. Fights return-path address forgeries and makes it easier to identify spoofs. Distinguishes authentic messages from forgeries before any message data is transmitted.
<b>Default Compliance Rules and Dictionaries</b>	
New compliance rules	There are now standard supplied rules to filter e-mails that contain credit card numbers, Social Security numbers and medical records.
New compliance dictionaries	There are now standard supplied dictionaries that you can use to filter e-mails that contain credit card numbers, Social Security numbers and medical records.
<b>E-mail Connection Management</b>	
E-mail Connection Management	You can add an extra layer of protection against unwanted e-mails by setting up E-mail Connection Management. This means you can automatically drop connections from untrustworthy sources and control incoming e-mail before e-mails are filtered.
<b>Web Threat Protection</b>	
Internet Threat Database	Protects against inappropriate and fraudulent Web links in e-mails. <i>Note: This has been re-branded from URL Category List.</i>
<b>General Maintenance</b>	
Improved dictionaries	Russian and Korean dictionaries have been added. There are also enhancements to existing dictionaries.
Remote installation	E-mail Filter can now be installed remotely by using a remote desktop or a Terminal Server.
Server configuration features re-branded	The 'Pre-screening' settings for server configuration in the Monitor have been renamed as 'E-mail Connection Management'.
eSMTP commands	A new dialog has been added in the Server Configuration console in the Monitor to enable you to enable and disable eSMTP commands.
VIA (Virtual Image Assistant) Licensing	VIA licensing now supports 1, 2 and 3 year licensing subscriptions.



# 1

## INTRODUCTION *New Features in Version 5.2*



## Chapter 2

## Pre-installation

In This Chapter	page 6
Minimum Requirements	page 6
Other Requirements	page 8
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## IN THIS CHAPTER

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This section contains information to help you install SurfControl E-mail Filter successfully.

This version of SurfControl E-mail Filter is for SMTP only.

## MINIMUM REQUIREMENTS

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During installation, the System Checker will check your system to see if it meets the minimum requirements for SurfControl E-mail Filter to be installed correctly. The minimum requirements are detailed in Table 2-1 to Table 2-2:

**Table 2-1** SurfControl E-mail Filter for SMTP

Processor	Intel Pentium III processor 600 MHz or higher
Memory	512 MB RAM minimum, 1024 MB recommended
Operating System	Windows 2000 Service Pack 4 Windows 2003 Enterprise Edition Service Pack 1 Windows 2003 R2 Enterprise Edition
Disk Space	200 MB Minimum Disk Space 500 MB is recommended.
Display	Super VGA (800 x 600) or higher resolution video adaptor and monitor
Web Browser	Microsoft Internet Explorer 5.0 or later
Networking	TCP/IP installed and configured with an Internet connection
DNS	Internal or External DNS configured
E-mail	E-mail system with SMTP gateway or MTA installed
MDAC	Microsoft Data Access Components MDAC 2.7 (Service Pack 2) or later
Database	Microsoft SQL Server 2000 or 2005  If this is not installed on your system, SurfControl E-mail Filter will automatically install MSDE 2000 Service Pack 3.  SQL Server is recommended for larger sites, as it handles large volumes of data more easily

**Table 2-2** SurfControl E-mail Filter for SMTP Admin Client

Processor	Intel Pentium III processor 600MHz or higher.
Operating System	Windows 2000 Service Pack 4 Windows 2003 Enterprise Edition Service Pack 1 Windows XP Service Pack 2
Display	Super VGA (800 x 600) or higher resolution video adaptor and monitor.
Web Browser	Microsoft Internet Explorer 5.0 or later.
MDAC	Microsoft Data Access Components MDAC 2.7 (Service Pack 2) or later.

## REPORT CENTRAL MINIMUM REQUIREMENTS

The computer where you are installing Report Central must meet the requirements listed in Table 2-3. The computer must be part of a network that meets the requirements listed in Table 2-4.

**Table 2-3** Report Central - basic requirements

Operating System	Windows 2000 Server Service Pack 4 Windows 2000 Advanced Server Service Pack 4 Windows Server 2003 Standard Edition Windows Server 2003 Enterprise Edition
Processor	Pentium III or higher
Memory	512 MB
Disk space	1 GB
Applications	Internet Explorer 5.0 or later Adobe Reader 6.0 or later to read reports in PDF format
Other	The recommended capacity of the SQL Server tempDB transaction log file is 15 MB. To allocate more disk space to this file, consult the <i>SRC for Web Filter Administrator's Guide</i> after you have installed Report Central.

**Table 2-4** Network requirements

Operating System	Windows 2000 Server Service Pack 4 Windows 2000 Advanced Server Service Pack 4 Windows Server 2003 Standard Edition Windows Server 2003 Enterprise Edition
Database	Microsoft MSDE or Microsoft SQL Server
Applications	SurfControl E-mail Filter 5.2 Internet Explorer 5.0 or later Adobe Reader 6.0 or later – to read reports in PDF format

## OTHER REQUIREMENTS

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Please note these requirements:

- None of the E-mail Filter components can be installed through a terminal server client.
- You must have full administrative rights to install E-mail Filter.
- You need the following information:
  - Your mail system's pre-registered domain name
  - The IP address or host name of your e-mail system's SMTP gateway or MTA.
  - The e-mail address of your e-mail system security administrator.
  - Your Activation Key as supplied by SurfControl.
  - The HTTP port number (default 80) to install and start the Administration Service.
  - The IP address of the relay host (for example your ISP) if you are not using MX records.

## INSTALLATION RECOMMENDATIONS

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SurfControl recommends that you install E-mail Filter on a dedicated server. To enable E-mail Filter to process e-mail immediately, do not use this server either as a mail server or a Web server.

## DEDICATED SURFCONTROL E-MAIL FILTER INSTALLATION

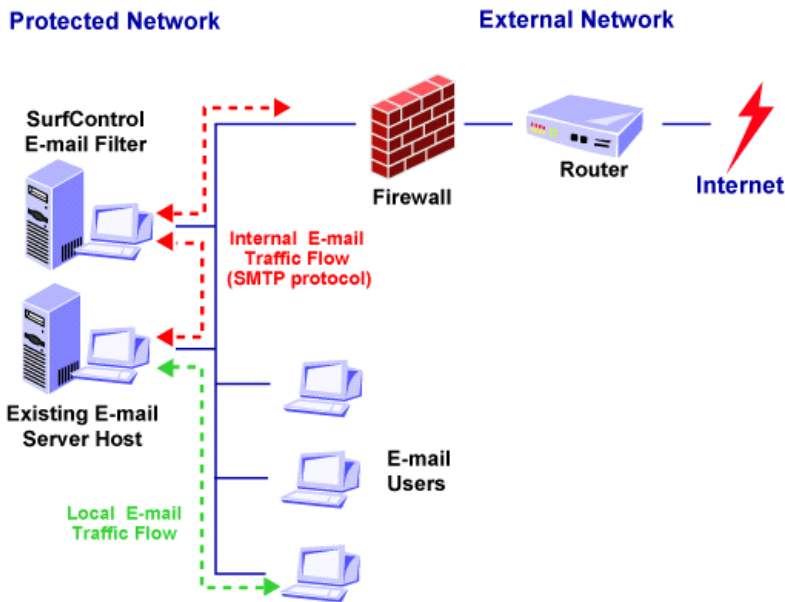


Figure 2-1 E-mail Filter on a dedicated server

### Outbound Connections

When using a dedicated server, you should:

- Direct any internal SMTP traffic on port 25 to the IP address of the E-mail Filter.
- Allow through the firewall only traffic that is sent from the E-mail Filter.

### Inbound Connections

To ensure that your system is correctly configured:

- On your SMTP Gateway, direct all e-mail to SurfControl E-mail Filter
- On your firewall, re-direct the existing inbound (Port 25) tunnel from your existing SMTP Gateway to SurfControl E-mail Filter.

### Relaying E-mail

In this installation, the existing mail server is configured to forward all e-mail to the SurfControl E-mail Filter. Changes to e-mail clients should not be required. Any POP clients using external e-mail servers should have their SMTP host set to SurfControl E-mail Filter.

Make sure your firewall allows SurfControl E-mail Filter to access sites outside the Internet with both Port 25 and Port 53 to support SMTP and DNS requests. You do not need to allow Port 53 if you have an internal DNS or are not using MX records.

## DEDICATED E-MAIL FILTER INSTALLATION USING A DEMILITARIZED ZONE (DMZ)

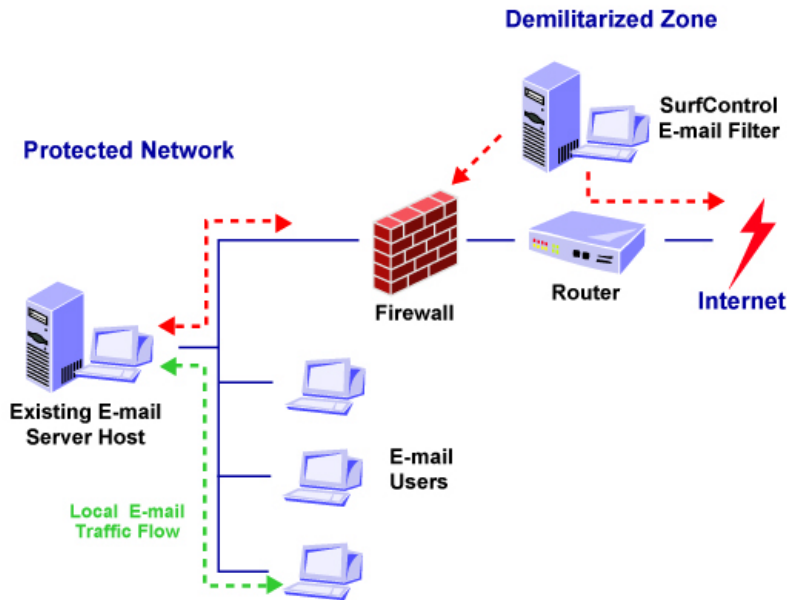


Figure 2-2 E-mail Filter with a DMZ

### Outbound Connections

The firewall has a tunnel configured for port 25 from the e-mail Host to the SurfControl E-mail server in the DMZ. A tunnel for port 25 is configured from the SurfControl E-mail server in the DMZ to the Internet.

### Inbound Connections

The firewall has the inbound port 25 tunnel configured to the SurfControl E-mail Filter server IP address (in the DMZ). A tunnel on port 25 from the SurfControl E-mail Filter server to the e-mail host is also configured.

### Relaying E-mails

The existing e-mail host is configured to relay all e-mail through SurfControl E-mail Filter. Changes to the e-mail Clients should not be required. Any POP Clients using external e-mail servers should have their SMTP host set to the SurfControl E-mail Filter server.

## E-MAIL FILTER INSTALLED ON A WINDOWS-BASED E-MAIL SERVER

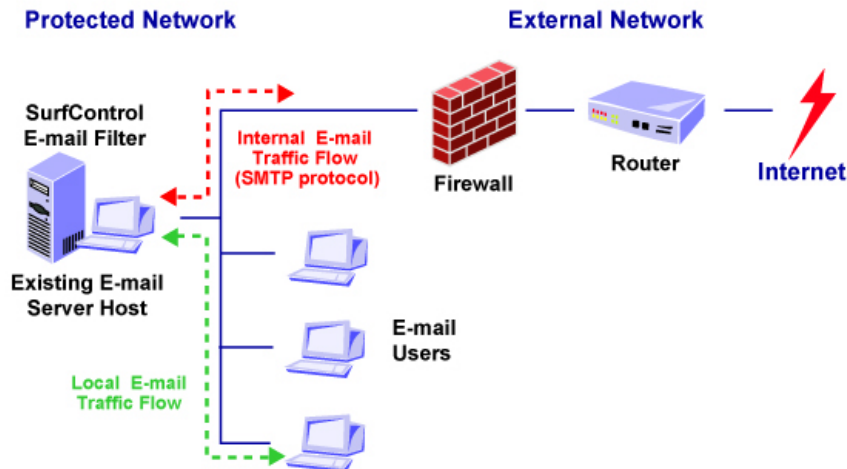


Figure 2-3 E-mail Filter on an existing mail server

### Outbound connections

The firewall is configured to only accept internal SMTP connections from the SurfControl E-mail Filter host. A tunnel for port 25 is configured from the SurfControl E-mail Filter server to the Internet.

### Inbound Connections

The firewall has the inbound port 25 tunnel configured to the SurfControl E-mail Filter server IP address. The existing e-mail host is configured to relay all e-mail to itself, through the SurfControl E-mail Filter server, on another port (for example, Port 26). Changes to the e-mail Clients should not be required.

### Relaying E-mails

Any POP clients using external e-mail servers should have their SMTP host set to the SurfControl E-mail Filter.

SurfControl do not recommended placing the existing e-mail server in the DMZ or Packet Switching Network, as this may be a data security risk. However, some POP configurations may require this configuration.



## INSTALLING ON WINDOWS 2000



**Warning:** If you are installing SurfControl E-mail Filter on an Exchange 2000 server, do not disable and stop the SMTP service.

When installing E-mail Filter on a Windows 2000 computer, you need to disable and stop services in the following circumstances:

- **Disable and stop the SMTP service before you install E-mail Filter** – The SMTP service uses port 25, which is the port that E-mail Filter uses. Therefore, you must disable and stop the SMTP service before you install E-mail Filter, otherwise E-mail Filter will not start.
- You can install E-mail Filter on any port, but you must first stop and disable any service using that port.
- Windows 2000 uses a Web publishing service on port 80. Unless you are using this service, SurfControl recommend that you disable this service.

In the following procedure, the SMTP service is disabled and stopped, but you can use this procedure to disable and stop any service. To disable and stop the SMTP service, follow Procedure 2-1:

### Procedure 2-1: Disable and stop the SMTP service

Step	Action
1	In the Windows Control Panel, select <b>Administrative Tools &gt; Services</b>
2	From the list of services, double-click the service: <b>Simple Mail Transport Protocol (SMTP)</b>
3	The properties dialog box is displayed. Click the <b>General</b> tab.
4	From the <b>Startup type:</b> drop-down list, select <b>Disabled</b> .
5	Click <b>Stop</b> .
6	Click <b>OK</b> .

The screenshot shows the 'Simple Mail Transport Protocol (SMTP) Properties' dialog box with the 'General' tab selected. The 'Service name' is SMTPSVC, 'Display name' is Simple Mail Transport Protocol (SMTP), and 'Description' is Transports electronic mail across the network. The 'Path to executable' is C:\WINNT\System32\inetnls\inetinfo.exe. The 'Startup type' dropdown is set to 'Disabled', and the 'Service status' is 'Disabled'. Buttons for Start, Stop, Pause, Resume, OK, Cancel, and Apply are visible at the bottom.



## Chapter 3

## Installation

<b>In This Chapter</b>	<b>page 14</b>
<b>Installation Options</b>	<b>page 14</b>
<b>Configuration After Installation</b>	<b>page 14</b>
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<b>Installing the Administration Client</b>	<b>page 28</b>
<b>Installing SurfControl Report Central</b>	<b>page 32</b>

## IN THIS CHAPTER

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This chapter describes the installation options, and explains how to install each one.

## INSTALLATION OPTIONS

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You can install the following components for SurfControl E-mail Filter:

- E-mail Filter Server – A complete installation of all components.
- Administration Client only – To install only specific components of E-mail Filter for remote monitoring and/or administration of the E-mail Filter server.

The Administration Client is part of a standard installation. You can only install this separately if you select a custom installation.

- SurfControl Report Central – To install the SurfControl reporting tool. For more details of this tool, see the *SurfControl Report Central Installation Guide* and the *SurfControl Report Central Administrator's Guide*.

Throughout the installation process you can click:

- **Next** to go to the next part of the process.
- **Back** to go back to the previous screen.
- **Cancel** to abort an installation.

## CONFIGURATION AFTER INSTALLATION

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For details of how you can configure E-mail Filter after installation, see the *SurfControl E-mail Filter Administrator's Guide*.

# INSTALLING E-MAIL FILTER



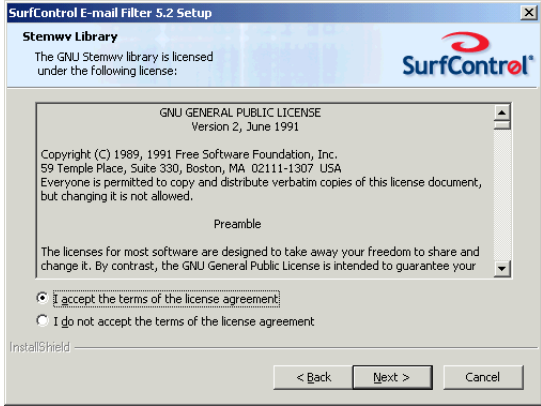
Note: This procedure assumes that you are installing all components of E-mail Filter for the first time, not upgrading from a previously installed version. Please see the README for details of upgrades.

For a complete installation of all the E-mail Filter components, follow Procedure 3-1:

Procedure 3-1: Installing E-mail Filter Server		
Step	Action	
1	<p>Select the folder in which to save the installation files. Either:</p> <ul style="list-style-type: none"> <li>Click <b>Next</b> to save to the default folder displayed, or</li> <li>Enter or change to a different folder, and then click <b>Next</b>.</li> </ul>	
2	<p>The InstallShield Wizard extracts files and prepares the setup.</p> <p><b>Note:</b> <i>If some files already exist on your system, an 'Overwrite Protection' pop-up message is displayed.</i></p>	

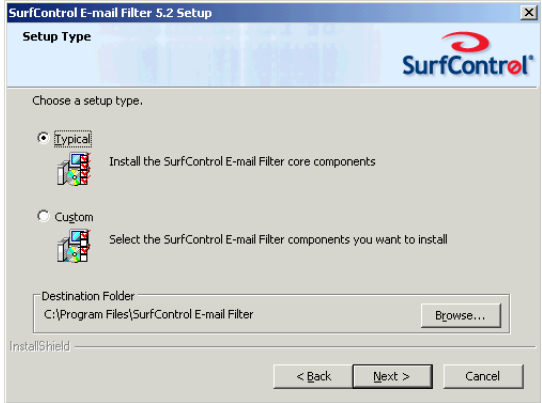
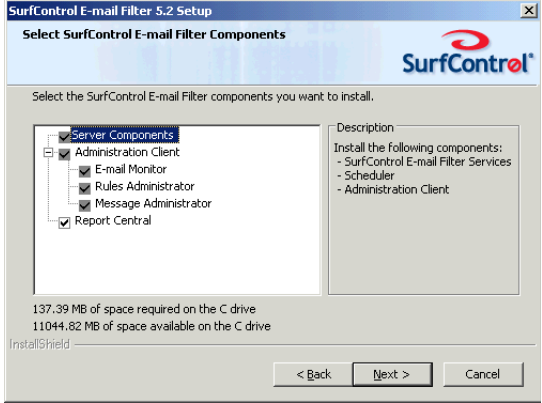
(Sheet 1 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
3	<p>The Setup Welcome screen is displayed. You can open either:</p> <ul style="list-style-type: none"> <li><b>Readme</b> – Contains details of enhancements and bug fixes for this release.</li> <li><b>Getting Started Guide</b> – This Installation Guide in PDF.</li> </ul> <p>Click <b>Next</b>.</p>	
<h3>SurfControl License Agreement</h3>		
4	<p>If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b>.</p>	
5	<p>Click <b>Next</b>.</p>	
<h3>GNU License Agreement</h3>		
6	<p>If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b>.</p>	
7	<p>Click <b>Next</b>.</p>	

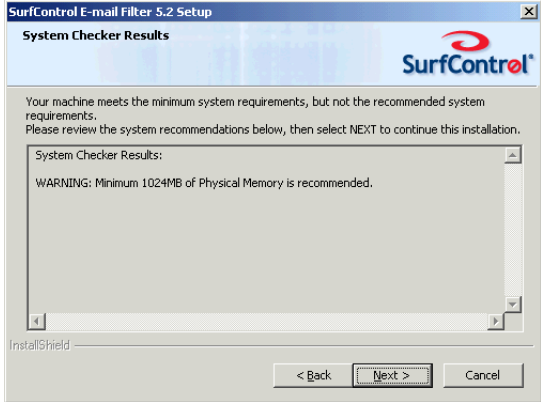
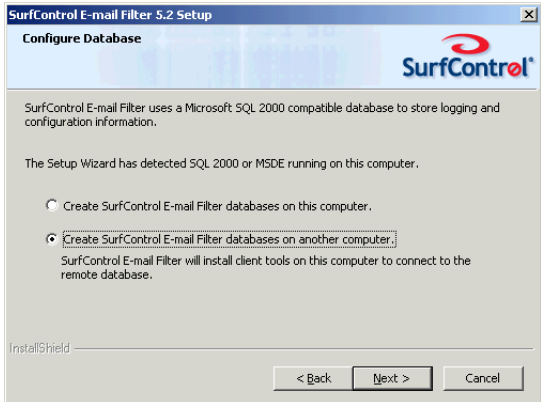
(Sheet 2 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
<p><b>Setup Type</b></p>		
<p>8</p>	<p>You can either select a typical or custom installation:</p> <ul style="list-style-type: none"> <li>• <b>Typical</b> – Installs all the core components of E-mail Filter.</li> <li>• <b>Custom</b> – Enables you to install only the components you need.</li> </ul> <p>Example: If you do not want to install the Administration Client.</p> <p>Click <b>Next</b>.</p>	
<p><b>Select Components</b></p>		
<p>9</p>	<p>The component selection screen is displayed.</p> <ul style="list-style-type: none"> <li>• If you have selected a 'Typical' installation, all of the check boxes are selected. You can only clear the Report Central check box.</li> <li>• If you have selected a 'Custom' installation, you can select or clear any of the check boxes.</li> </ul> <p>Click <b>Next</b>.</p> <p>Your system is checked for its suitability against minimum and recommended requirements.</p>	

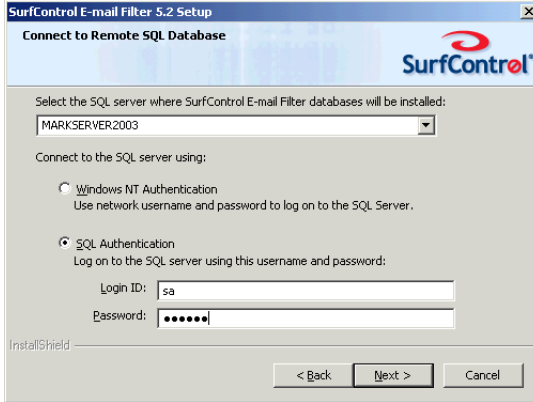
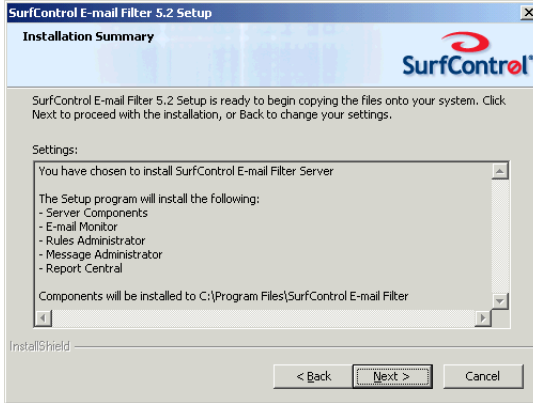
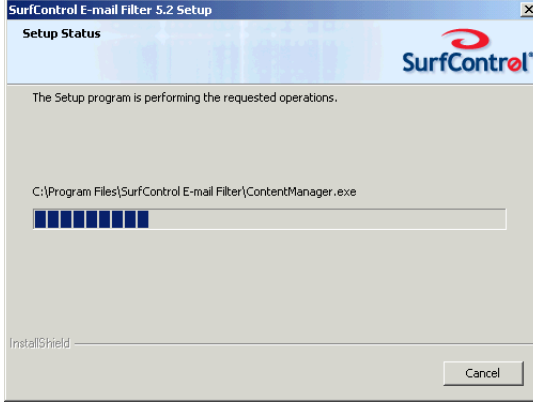
(Sheet 3 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
<b>Results Checker</b>		
10	<p>The results of the system check are displayed.</p> <p>If your system does not meet the minimum requirements, one of these messages is displayed:</p> <ul style="list-style-type: none"> <li>• <b>Error</b> – A required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level will cause this message.</li> <li>• <b>Warning</b> – A warning is displayed if you do not have enough memory or disk space, but the installation is not stopped.</li> <li>• <b>Install</b> – A component, such as an MDAC component, has not been detected and will be installed as part of the process. As part of this process you may be instructed to reboot.</li> </ul> <p>Please see “Minimum Requirements” on page 6.</p> <p>If your system meets the minimum requirements, you can continue; it does not need to meet the recommended requirements.</p> <p>Click <b>Next</b>.</p>	
11	<p>E-mail Filter uses a relational database to store rules, system configuration and dictionaries.</p> <ul style="list-style-type: none"> <li>• If you do not have SQL Server installed, the installation program automatically downloads MSDE from the SurfControl server. Follow the on-screen instructions.</li> <li>• If you have SQL Server installed, the <b>Configure Database</b> screen is displayed. You can create databases on either this computer or on a remote computer.</li> </ul> <p>Click <b>Next</b>.</p>	

(Sheet 4 of 13)

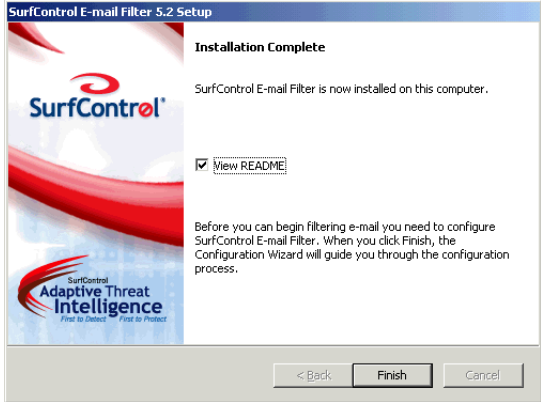

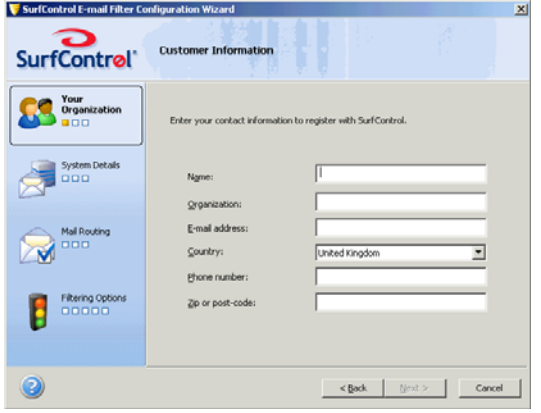
Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
12	<p>If you have selected to create databases on a remote computer, a screen enables you to specify whether you want to connect to the remote SQL server using NT or SQL authentication.</p> <p>If you select SQL authentication, enter the login ID and password.</p> <p><b>Make sure the SQL Server is running in mixed mode.</b></p> <p>Click <b>Next</b>.</p>	
13	<p>A summary screen displays your selections and the installation location of the components.</p> <p>Click <b>Next</b>.</p>	
14	<p>A progress bar shows the status of the setup.</p>	

(Sheet 5 of 13)

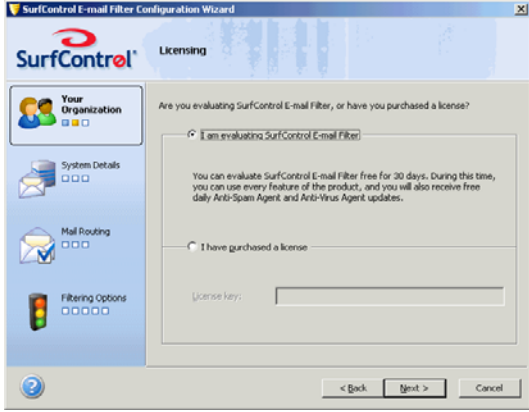
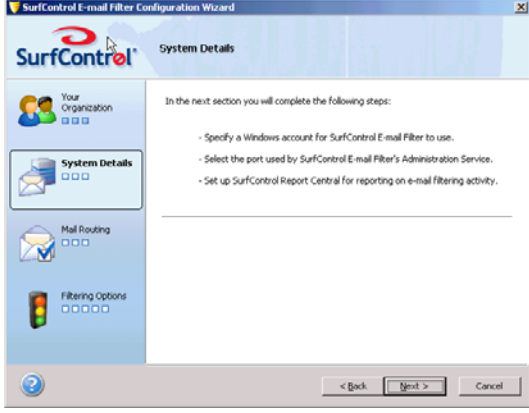



## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
15	An installation complete screen is displayed. Select or clear the check box to view the README file.	
16	Click <b>Finish</b> .	
17	<p>The Configuration wizard welcome screen opens, which explains the configuration steps.</p> <p><b>Note:</b> <i>Stages 3 and 4 are not available if you are using an existing configuration database.</i></p> <p>The configuration screens contain useful graphics that show exactly where you are in the configuration process.</p> <p>Click <b>Next</b>.</p>	
18	<p>In the <b>Customer Information</b> screen, enter your details, and then click <b>Next</b>.</p> <p><b>Note:</b> <i>The Next button is not active until you have entered all your details.</i></p>	

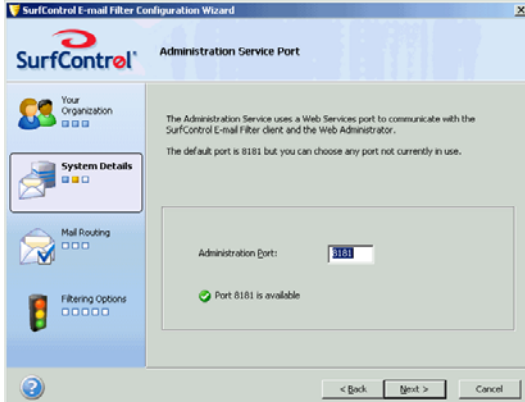
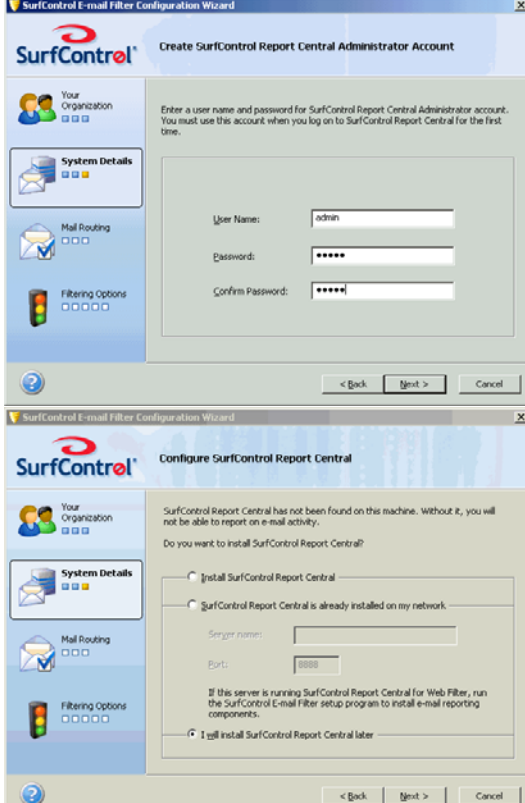
(Sheet 6 of 13)

### Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
19	<p>In the <b>Licensing</b> screen, you can select to either:</p> <ul style="list-style-type: none"> <li>• evaluate E-mail Filter, or</li> <li>• activate E-mail Filter using the license that you have bought.</li> </ul> <p>If you have bought a license, select the option <b>I have purchased a license</b>, and then enter the license keys in this screen and the next.</p>	
20	<p>Click <b>Next</b>.</p>	
21	<p>The <b>System Details</b> screen describes the details that you have to enter in this section. Click <b>Next</b>.</p>	
22	<p>Enter the details of your Windows user account. If your login details are incorrect, a pop-up message asks you to enter your details again. Click <b>Next</b>.</p>	

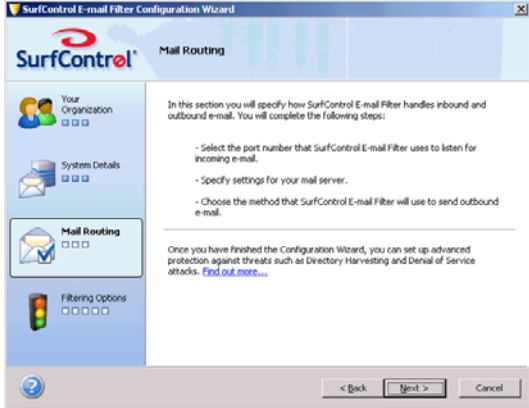
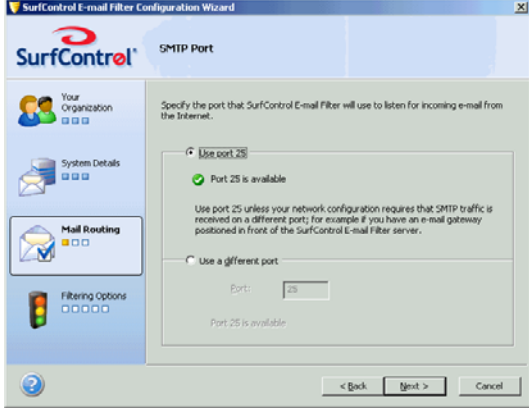
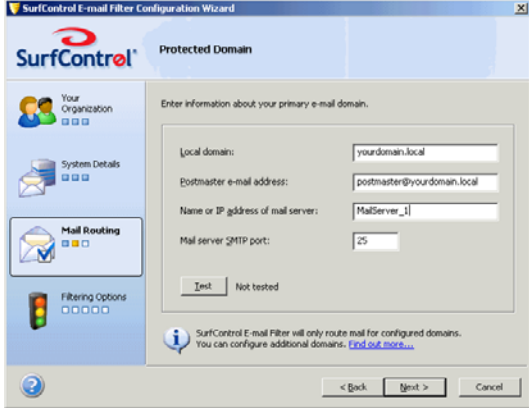
(Sheet 7 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
23	<p>If you have selected to install the E-mail Filter Administration client, enter a Web services port that the E-mail Filter Administration client should use to communicate with the E-mail Filter client and the Web Administrator.</p> <p>Default = 8181</p> <p>Click <b>Next</b>.</p>	
24	<p>If you have selected to install SurfControl Report Central, enter the user name and password that will be required to log on to this component.</p> <p>If you have not selected to install SurfControl Report Central, this screen has extra options to install now or later.</p> <p>Click <b>Next</b>.</p> <p>For more information of how to install SurfControl Report Central, see the <i>SurfControl Report Central Installation Guide</i>.</p>	

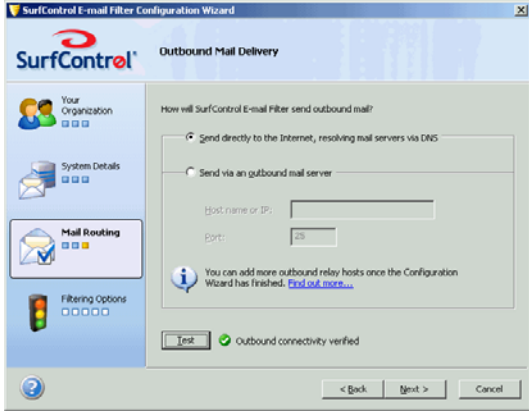
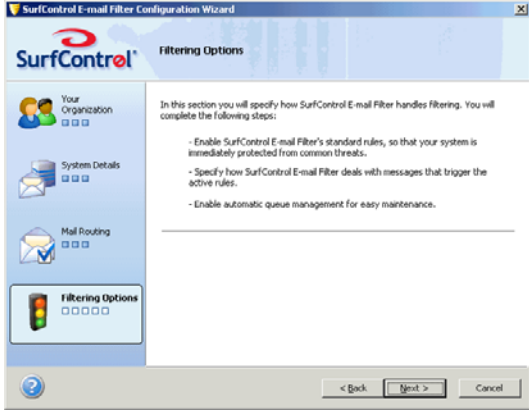
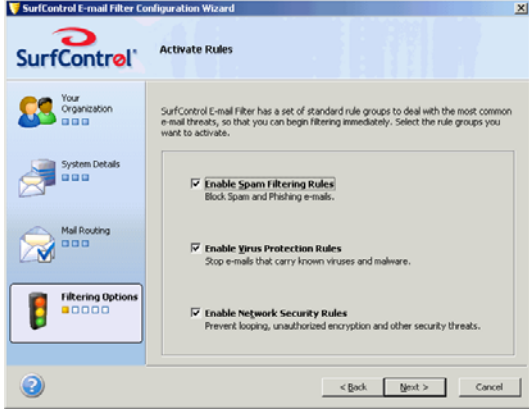
(Sheet 8 of 13)

### Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
25	<p>The <b>Mail Routing</b> screen describes the details that you have to enter in this section.</p> <p>Click <b>Next</b>.</p> <p>For more information about how to set up advanced threat protection, see the <i>SurfControl E-mail Filter System Administrator's Guide</i>.</p>	
26	<p>E-mail Filter uses the SMTP port that receives your e-mail traffic from the Internet.</p> <p>Select either:</p> <ul style="list-style-type: none"> <li>port 25, which is the default, or</li> <li>a different port; enter the port number.</li> </ul> <p>Click <b>Next</b>.</p>	
27	<p>Enter the information about your primary e-mail domain.</p> <p>If you are unsure about the validity of the details, click <b>Test</b> to test the connection.</p> <p>Click <b>Next</b>.</p> <p>For more information about how to configure additional domains, see the <i>SurfControl E-mail Filter System Administrator's Guide</i>.</p>	

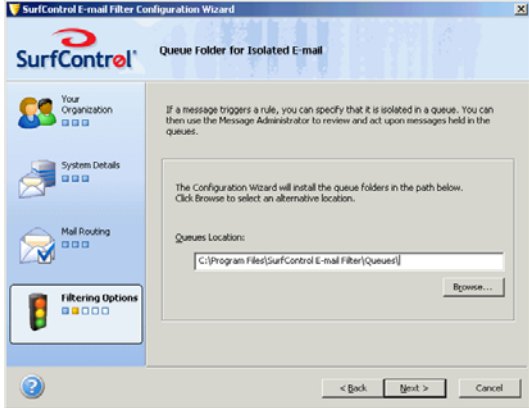
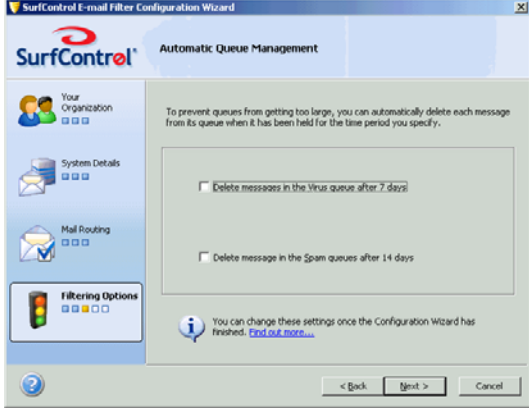
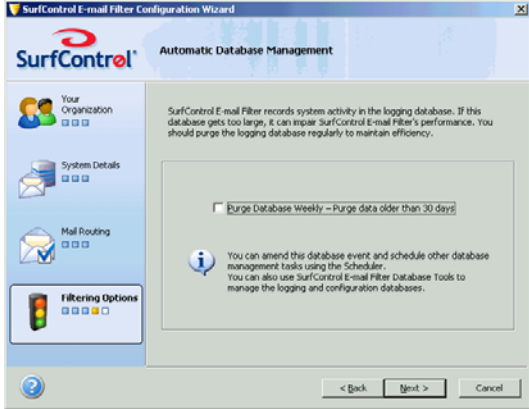
(Sheet 9 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
28	<p>Select how E-mail Filter will send outbound e-mails:</p> <ul style="list-style-type: none"> <li>Send directly to the Internet, resolving mail servers by using DNS.</li> <li>Send through an outbound mail server. Enter the host name or IP address, and the port number.</li> </ul> <p>If you are unsure about the validity of the details, click <b>Test</b> to test the connection.</p> <p>Click <b>Next</b>.</p> <p>For more information about how to add outbound relay hosts, see the <i>SurfControl E-mail Filter System Administrator's Guide</i>.</p>	
29	<p>The <b>Filtering Options</b> screen describes the details that you have to enter in this section.</p> <p>Click <b>Next</b>.</p>	
30	<p>To enable you to start filtering your e-mail immediately, E-mail Filter is supplied with standard rule groups that deal with the most common e-mail threats. All of these groups are selected by default.</p> <p>To remove filtering using a rule group, clear the relevant check box.</p>	

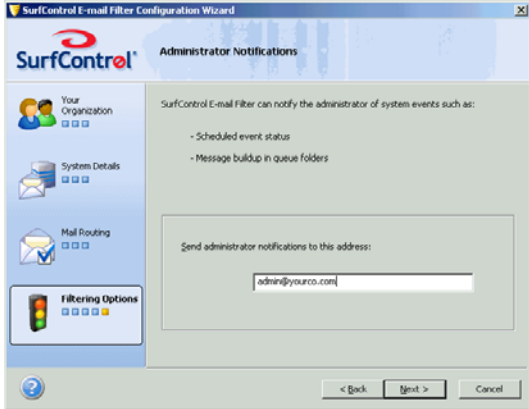
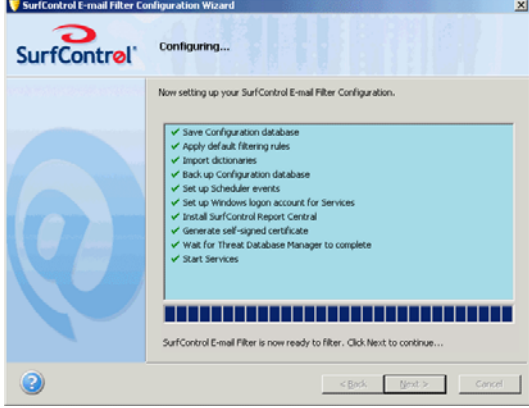
(Sheet 10 of 13)

### Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
31	<p>If an e-mail triggers a rule, you can isolate the e-mail in a queue folder.</p> <p>Either:</p> <ul style="list-style-type: none"> <li>Click <b>Next</b> to use the default folder displayed, or</li> <li>Enter or browse to a folder, and then click <b>Next</b>.</li> </ul>	
32	<p>To prevent queues becoming too large, you can select to delete e-mails from specific queues after a specific time period.</p> <p>For more information on queue management, see the <i>SurfControl E-mail Filter System Administrator's Guide</i>.</p> <p>click <b>Next</b>.</p>	
33	<p>To prevent the logging database becoming too large and to maintain performance, you can select to purge this database regularly.</p> <p>For more information on database management, see the <i>SurfControl E-mail Filter System Administrator's Guide</i>.</p> <p>Click <b>Next</b>.</p>	


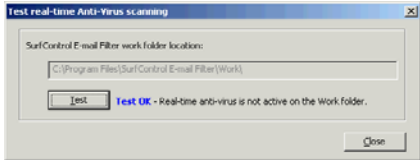

(Sheet 11 of 13)

## Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
34	<p>To enable the system administrator to receive e-mail notifications of system events, enter an e-mail address.</p> <p>Click <b>Next</b>.</p>	
35	<p>The Configuration Wizard is now ready to configure the tasks displayed in the list with the details you specified.</p> <p><b>Note:</b> <i>If you do not want the configuration process to continue, click Cancel. The Configuration Wizard will save your settings up to this point so that you can run the wizard another time.</i></p> <p>Click <b>Start</b> to proceed with the configuration process. The screen displays the progress of the configuration.</p> <p>If an event fails, do one of the following:</p> <ul style="list-style-type: none"> <li>• Click <b>Back</b>, and then amend the relevant details.</li> <li>• Click <b>Retry</b> to retry the configuration of the event without amending any details.</li> <li>• Click <b>Skip</b> to miss out the configuration of the current event and continue the configuration of the next events.</li> </ul>	

(Sheet 12 of 13)

### Procedure 3-1: Installing E-mail Filter Server (Continued)

Step	Action	
36	<p>To enable real-time anti-virus scanning that protects your system against threats, your anti-virus product must not scan the E-mail Filter work folder.</p> <p>To check if your folder will be scanned, click <b>Check Folders</b>.</p>	
37	<p>In the dialog box that is displayed, click <b>Test</b>.</p>	
38	<p>If <b>Test OK</b> is displayed, click <b>Close</b>.</p> <p><b>Note:</b> <i>If the test fails, SurfControl recommends that you exclude all E-mail Filter directories from real-time anti-virus scanning.</i></p>	
39	<p>Click <b>OK</b>.</p>	
40	<p>A Configuration Complete screen is displayed. Click <b>Finish</b>.</p>	

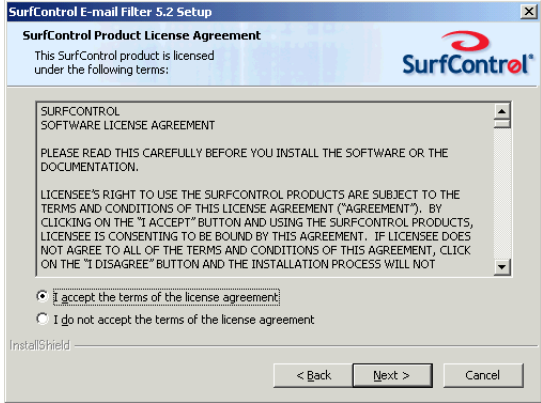
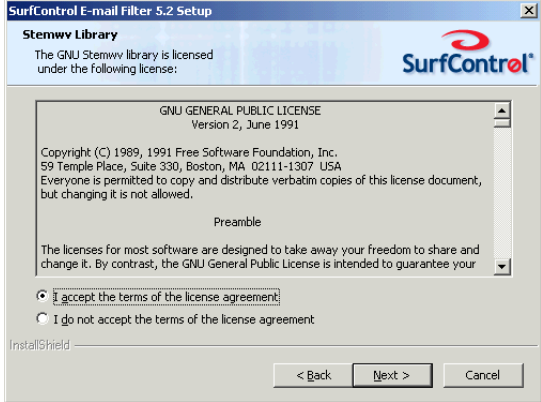
(Sheet 13 of 13)



## INSTALLING THE ADMINISTRATION CLIENT

To install selected E-mail Filter components for use through remote administration, follow Procedure 3-2:

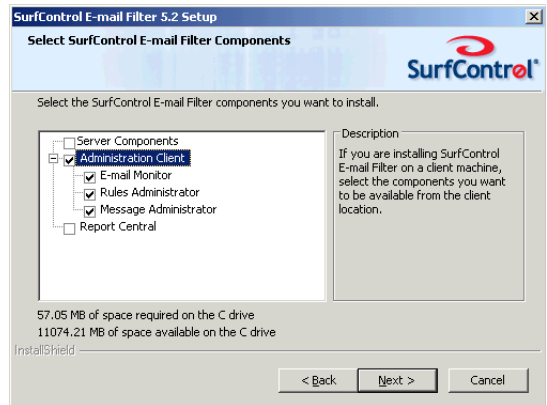
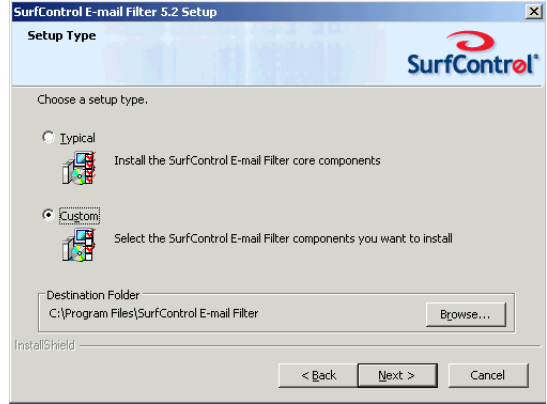
### Procedure 3-2: Installing the Administration Client

Step	Action	
1	From the Welcome screen, click <b>Next</b> .	
<b>SurfControl License Agreement</b>		
2	If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b> .	
3	Click <b>Next</b> .	
<b>GNU License Agreement</b>		
4	If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b> .	
5	Click <b>Next</b> .	

(Sheet 1 of 4)

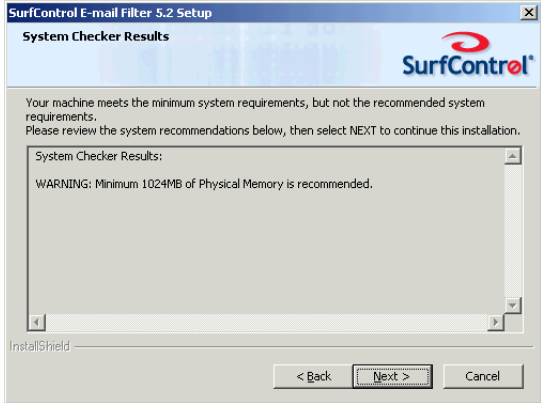
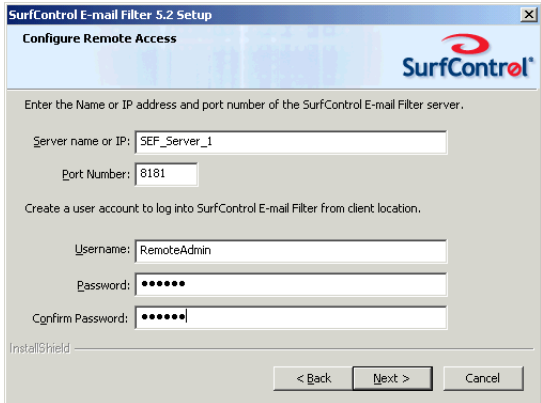
## Procedure 3-2: Installing the Administration Client (Continued)

Step	Action
<b>Setup Type</b>	
6	Select <b>Custom</b> . This enables you to install only the components you need.
7	Click <b>Next</b> .
<b>Select Components</b>	
8	Select <b>Administration Client</b> . All of the subcomponents are selected. Clear any of the subcomponents that are not needed.
9	Click <b>Next</b> .



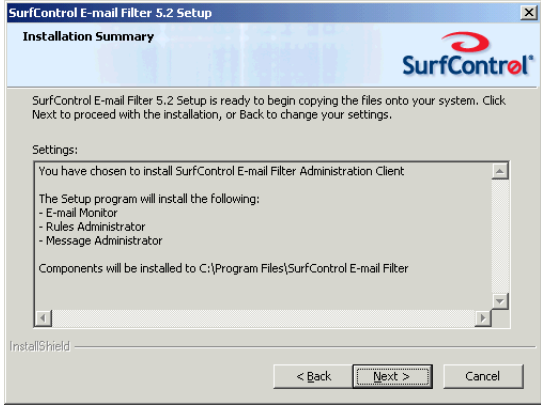
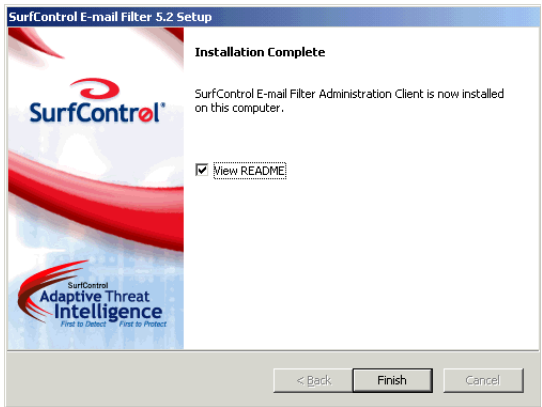
(Sheet 2 of 4)

## Procedure 3-2: Installing the Administration Client (Continued)

Step	Action	
<b>Results Checker</b>		
10	<p>The results of the system check are displayed.</p> <p>If your system does not meet the minimum requirements, one of these messages is displayed:</p> <ul style="list-style-type: none"> <li><b>Error</b> – A required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level will cause this message.</li> <li><b>Warning</b> – A warning is displayed if you do not have enough memory or disk space, but the installation is not stopped.</li> <li><b>Install</b> – A component, such as an MDAC component, has not been detected and will be installed as part of the process. As part of this process you may be instructed to reboot.</li> </ul> <p>Please see “Minimum Requirements” on page 6.</p> <p>If your system meets the minimum requirements, you can continue; it does not need to meet the recommended requirements.</p> <p>Click <b>Next</b>.</p>	
<b>Configure Remote Access</b>		
11	<p>Enter the details of your E-mail Filter server:</p> <ul style="list-style-type: none"> <li>Server name or IP address</li> <li>Port number</li> <li>User name</li> <li>Password.</li> </ul> <p>These details enable users on this computer to log on to the E-mail Filter server and use the selected E-mail Filter administration tools.</p>	
12	Click <b>Next</b> .	

(Sheet 3 of 4)

## Procedure 3-2: Installing the Administration Client (Continued)

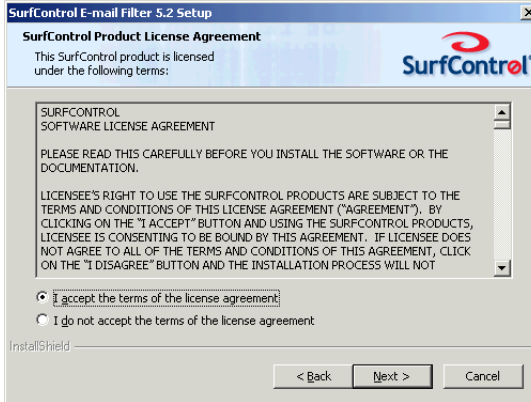
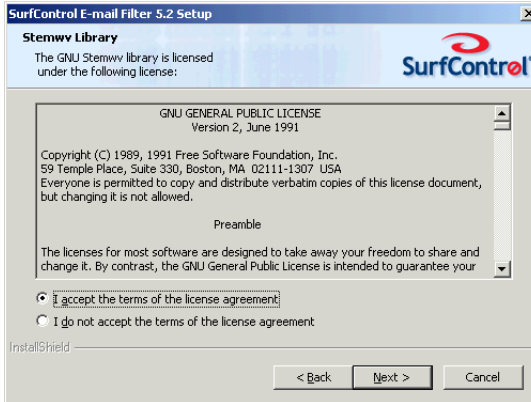
Step	Action	
<b>Installation Summary</b>		
13	<p>A summary of your options is displayed.</p> <p><b>Note:</b> <i>By default, the components will be installed in the folder C:\Program Files\SurfControl E-mail Filter.</i></p> <p>If the options are correct, click <b>Next</b>.</p> <p>If you need to change any details, click <b>Back</b>.</p>	
14	Click <b>Next</b> .	
<b>Finish</b>		
15	<p>An Installation Complete screen is displayed.</p> <p>Click <b>Finish</b>.</p> <p>You can select to view the README file.</p>	
16	Click <b>Finish</b> .	

(Sheet 4 of 4)

## INSTALLING SURFCONTROL REPORT CENTRAL

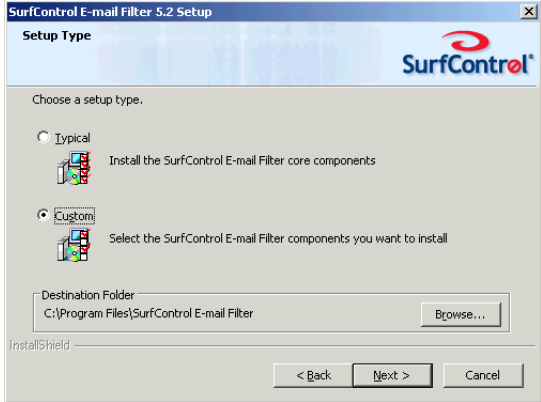
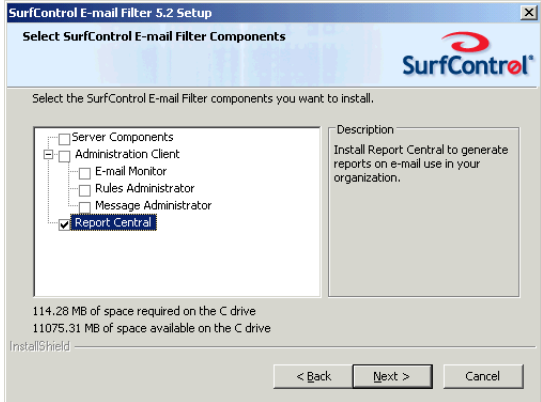


To install Report Central, SurfControl's reporting tool, follow Procedure 3-3:

### Procedure 3-3: Installing SurfControl Report Central

Step	Action
1	<p>SurfControl recommends that you install the following components before you install SurfControl Report Central:</p> <ul style="list-style-type: none"> <li>• Java 2 SDK 1.4.2</li> <li>• Tomcat Web Server.</li> </ul> <p><b>Note:</b> <i>Because SurfControl Report Central can contain confidential information on its database, you should install it on a secure environment.</i></p>
2	From the E-mail Filter welcome screen, click <b>Next</b> .
<b>SurfControl License Agreement</b>	
3	<p>If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b>, and then click <b>Next</b>.</p> 
<b>GNU License Agreement</b>	
4	<p>If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b>, and then click <b>Next</b>.</p> 

(Sheet 1 of 6)

**Procedure 3-3: Installing SurfControl Report Central (Continued)**

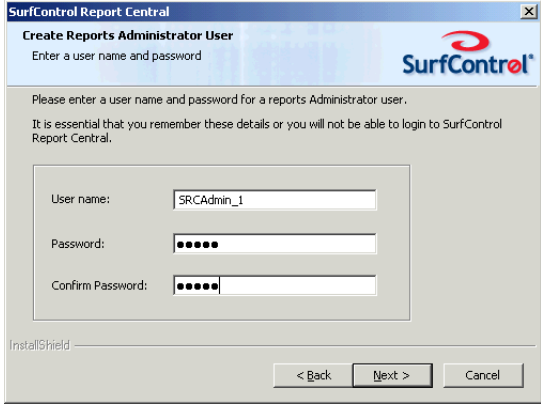
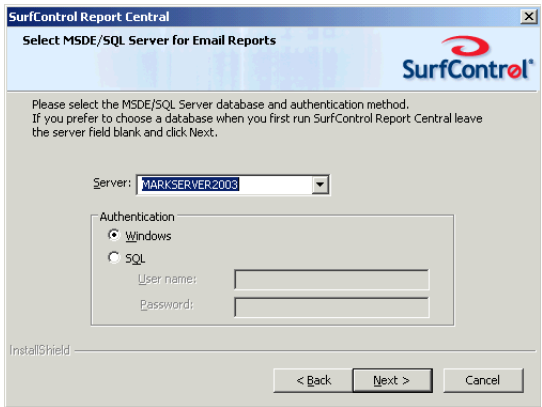
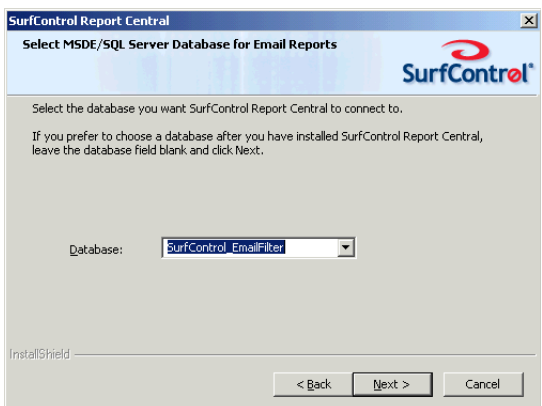
Step	Action	
<b>Setup Type</b>		
5	Select <b>Custom</b> . This enables you to install only the components you need.	
<b>Select Components</b>		
6	Select <b>Report Central</b> , and then click <b>Next</b> .	
7	<b>SurfControl Report Central Welcome Screen</b>	
8	Click <b>Next</b> .	

### Procedure 3-3: Installing SurfControl Report Central (Continued)

Step	Action	
9	<b>SurfControl Report Central License Agreement</b>	
10	If you accept the terms of the license agreement, select <b>I accept the terms of the license agreement</b> , and then click <b>Next</b> .	
11	<b>Choose Location of Files</b>	
12	By default, the installation program installs Report Central files in:  C:\Program Files\SurfControl\Report Central  You can either: <ul style="list-style-type: none"> <li>Click <b>Next</b> to select the default location.</li> <li>Browse to a different location, and then click <b>Next</b>.</li> </ul>	
13	<b>Select Features</b>	
14	You can select to install features that enable you to create reports for Web Filter and/or E-mail Filter.  Select <b>E-mail Filter Reports</b> , and then click <b>Next</b> .	

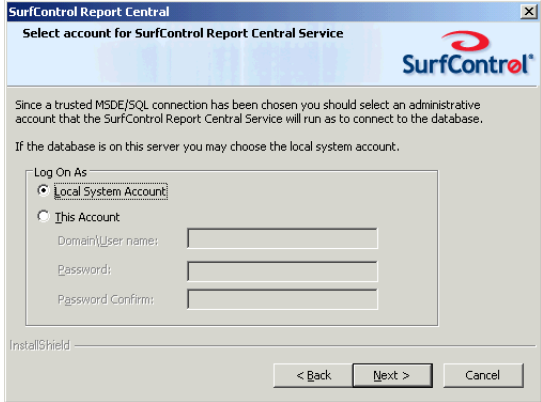
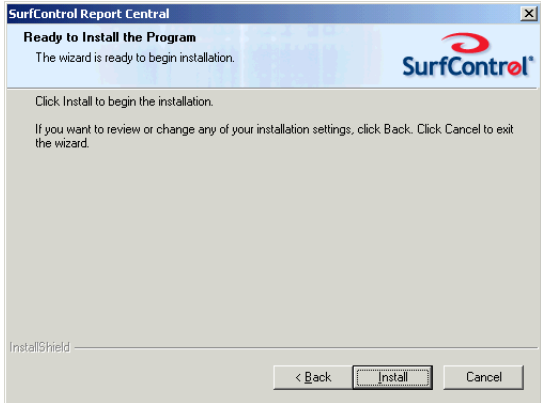
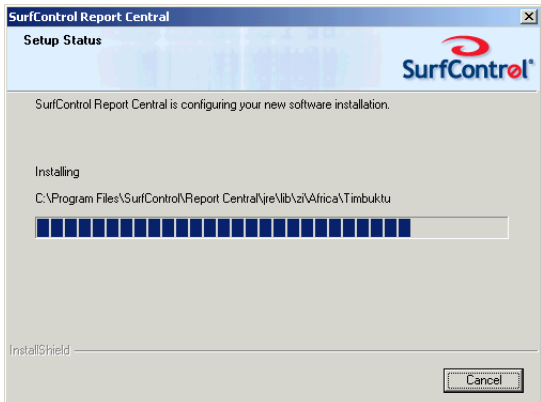
(Sheet 3 of 6)

**Procedure 3-3: Installing SurfControl Report Central (Continued)**

Step	Action	
15	<b>Create Report Central Administration User</b>	
16	Enter a user name and password for the first Reports Central Administrator.  These details are needed the first time an administrator logs on to Report Central.	
<b>Select an MSDE/SQL Server</b>		
17	Enter or select the name of the server that contains the SQL database.	
18	Select the authentication method that Report Central will use to connect to the server. If you select SQL authentication, enter the user name and password of an account with administrator access to the server.	
19	Click <b>Next</b> .	
<b>Select an MSDE/SQL Server Database</b>		
20	From the drop-down list, select the SurfControl E-mail Filter database that you want Report Central to connect to.	
21	Click <b>Next</b> .	




## Procedure 3-3: Installing SurfControl Report Central (Continued)

Step	Action	
<b>Selecting an Account for the SurfControl Report Service</b>		
22	<p>If you selected a trusted MSDE/SQL connection, you will be asked to specify an account that Report Central will use to connect to the database.</p> <p>You can either:</p> <ul style="list-style-type: none"> <li>Use the local system account</li> <li>Use the account details you specify. Select <b>This Account</b> and enter the authentication details of the account you want to use.</li> </ul>	
23	Click <b>Next</b> to continue.	
<b>Ready to Install</b>		
24	<p>Report Central is ready to install.</p> <p>This is the last point at which you can click <b>Back</b> to change any details, or click <b>Cancel</b> to cancel the installation.</p> <p>To continue with the installation, click <b>Install</b>.</p>	
<b>Setup Status</b>		
25	A progress bar shows the status of the setup.	

(Sheet 5 of 6)

### Procedure 3-3: Installing SurfControl Report Central (Continued)

Step	Action	
<b>Installation Complete</b>		
26	<p>The Installation Complete screen is displayed.</p> <p>You must restart your computer before you can use Report Central.</p> <p>For more information about how to use Report Central see the <i>SurfControl E-mail Filter Administrator's Guide</i>.</p> <p>Click <b>Finish</b>.</p>	

(Sheet 6 of 6)

# 3

## INSTALLATION

### *Installing SurfControl Report Central*