



Version 2.5

SurfControl Report Central *Starter Guide*



NOTICES

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November 2006

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CONTENTS

Notices.....	i
Comments on this Guide?.....	ii
Technical Support.....	iii
SurfControl Sales.....	iii
BEFORE YOU BEGIN	1
About Report Central.....	2
System Requirements	2
Transaction Log File	2
Installation Notes	3
Upgrade Paths	3
SQL Server 2005 Express	3
INSTALLING REPORT CENTRAL	5
Introduction.....	6
Report Central for Web Filter.....	6
Report Central for E-mail Filter.....	12
Report Central for Both Web Filter and E-mail Filter.....	16
Upgrading SRC.....	21
Authentication	24
Post-Installation Procedures.....	25
Pop-up blockers	25
Cookies	25
Managing Database Disk Space	25
SRC for E-mail Filter Reports – Linked Servers	26

Before You Begin

About Report Centralpage 2
System Requirements.....page 2

ABOUT REPORT CENTRAL

SurfControl Report Central works with SurfControl Web and E-mail Filter to generate reports on your organization's Internet and e-mail use. Choose from a wide range of useful pre-configured graphs and tables, or set up your own powerful, flexible, custom reports.

SYSTEM REQUIREMENTS

To install Report Central, your server needs to meet the requirements listed in [Table 1-1](#).

Table 1-1 Report Central - basic server requirements

Item	Requirement
Operating System	Windows 2000 Server Service Pack 4 Windows 2000 Advanced Server Service Pack 4 Windows Server 2003 Standard Edition Service Pack 1 Windows Server 2003 Enterprise Edition Service Pack 1
Processor	Pentium III or higher
Memory	512 MB
Disk space	1 GB

To run report central on a client computer, the client needs to meet the following requirements.

Table 1-2 Report Central - basic client requirements

Item	Requirement
Browser	Internet Explorer 5.0 or later
File viewer	Adobe Reader 6.0 or later to read reports in PDF format

TRANSACTION LOG FILE

The size of the SQL Server transaction log file (tempDB) increases during the filtering process. It is recommended that you allocate 25% of the capacity of the database to this log file after you have installed Report Central.

To allocate more disk space to this file, see [Managing Database Disk Space on page 25](#).

INSTALLATION NOTES

You should be aware of the following for SRC.

Server Name Syntax

If you have installed Microsoft security patch MS01 - 055 for Internet Explorer 5.5 or 6, the names of your servers or domains must use alphanumeric characters only. Characters such as the underscore (“_”) will cause the cookie to be blocked. See [Microsoft KB article 316112](#) for more details.

Removed Reports

For this release, the Detail report ‘Manually Categorized URL’ and the VCA report have been removed. If you are upgrading from a previous version of SRC, any existing reports that are based on these report templates will also be removed.

UPGRADE PATHS

You can upgrade the following versions of Report Central to version 2.5.

Table 1-3 Upgrade paths

Report Central for Web Filter	Report Central for E-mail Filter
2.0.0.15	1.5/2.0.1.10
2.0.2.2	2.0.2.2
2.0.3.6	2.0.3.6



Caution: SRC v2.5 only works with E-mail Filter v5.5 and Web Filter v5.5.

SQL SERVER 2005 EXPRESS

You can install SQL Server 2005 Express if SRC cannot detect an instance of MSDE, SQL Server 2000/2005/2005 Express. This is only available if you are upgrading to or installing a new SRC v2.5 for E-mail Filter v5.5.

1

BEFORE YOU BEGIN *System Requirements*

Installing Report Central

Introduction	page 6
Report Central for Web Filter	page 6
Report Central for E-mail Filter	page 12
Report Central for Both Web Filter and E-mail Filter	page 16
Upgrading SRC	page 21
Authentication	page 24
Post-Installation Procedures	page 25

INTRODUCTION

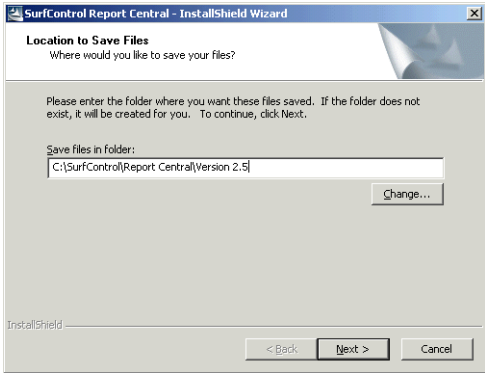
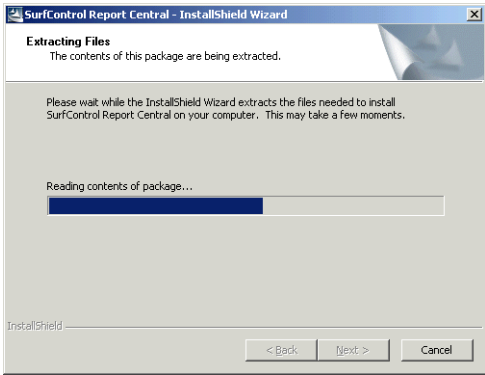
You can install SurfControl Report Central for either Web Filter, E-mail Filter, or both together. This chapter details each type of installation.

Please see the *SurfControl Report Central Administrator's Guide* for information on how to set up and run reports for both Web Filter and E-mail Filter.

REPORT CENTRAL FOR WEB FILTER

To install Report Central for SurfControl Web Filter, follow [Procedure 2-1](#).

Procedure 2-1 Installing Report Central for Web Filter

Step	Action	
1	Run the Report Central executable (example, SRC_v2501.exe) to open the Installation Wizard.	
2	Select the folder in which to save the installation files. Either: <ul style="list-style-type: none"> Click Next to save to the default folder displayed, or Enter or change to a different folder, and then click Next. 	
3	The InstallShield Wizard extracts files and prepares the setup. Note: If some files already exist on your system, an 'Overwrite Protection' pop-up message is displayed.	

(Sheet 1 of 6)

Procedure 2-1 Installing Report Central for Web Filter (Continued)

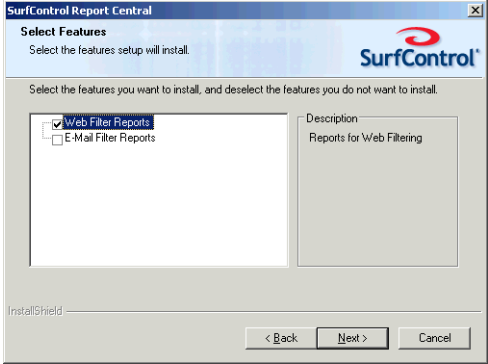
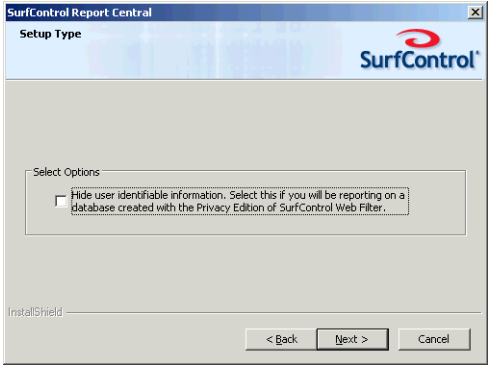
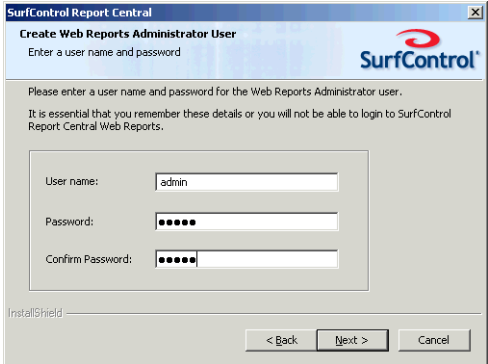
Step	Action	
4	The Welcome screen is displayed. Click Next .	
5	The License Agreement screen is displayed. If you accept the terms of the agreement, select I accept the terms of the license agreement .	
6	Click Next .	
7	The Choose Destination Location screen is displayed. To accept the default destination for the Report Central files, click Next . Alternatively, browse to the location where you want the files to be installed.	
8	Click Next .	

(Sheet 2 of 6)

2

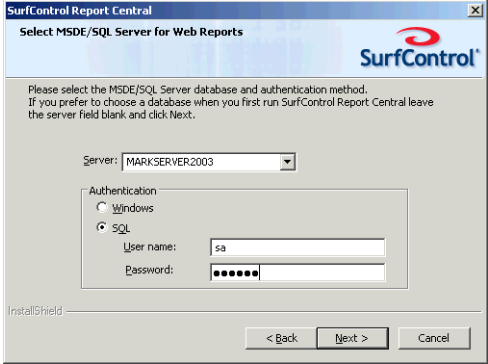
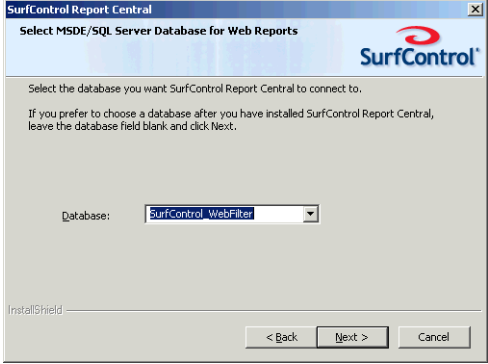
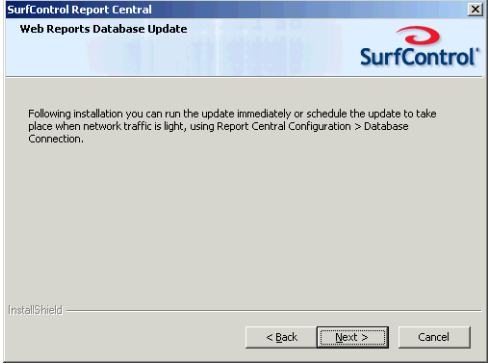
INSTALLING REPORT CENTRAL Report Central for Web Filter

Procedure 2-1 Installing Report Central for Web Filter (Continued)

Step	Action	
9	The Select Features screen is displayed. To install Web Filter reports, you need to clear the E-mail Filter Reports check box, and then click Next .	
10	The Setup Type screen is displayed. If you are reporting on a database created with the Privacy Edition of SurfControl Web Filter, you can select this option so that user information is not shown in reports.	
11	Click Next	
12	Create an account for the user who will be administrating Report Central. Enter a username and password, then confirm the password. Note: These details are needed the first time an administrator logs on to Report Central.	
13	Click Next .	

(Sheet 3 of 6)

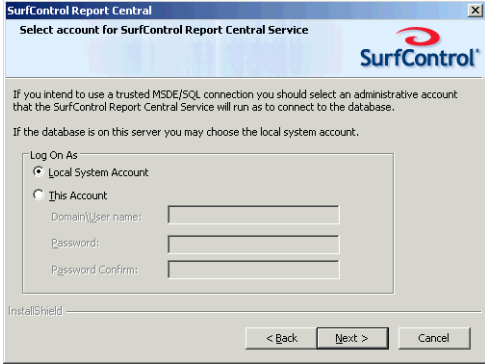
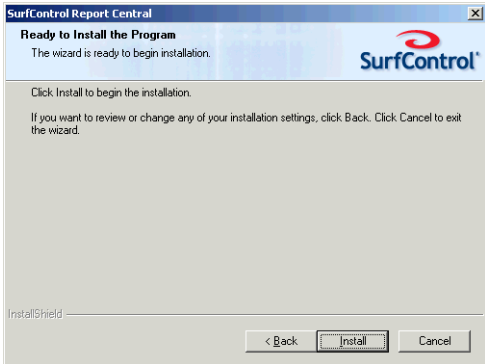
Procedure 2-1 Installing Report Central for Web Filter (Continued)

Step	Action	
14	<p>Specify the server that contains the MSDE/SQL database that you want to report on.</p> <p>Select the authentication method that the server uses. Select one of the following:</p> <ul style="list-style-type: none"> Windows authentication SQL authentication. <p>If the server uses SQL authentication, enter the user name and password.</p> <p>For details of SRC service account/SQL database authentication combinations, see Authentication on page 24.</p>	
15	Click Next .	
16	Select the database from the drop-down list box. In a default Web Filter installation using Windows authentication, this will be <code>SurfControl_WebFilter</code>	
17	Click Next .	
18	<p>You will then be reminded to schedule a database update when you have finished installing Report Central.</p> <p>Report Central needs to update the database to enable Drill-Down Reporting and the Threat Dashboard to work.</p> <p>See the <i>SurfControl Report Central for Web Filter Administrator's Guide</i> for information on how to schedule a database update.</p> <p>Click Next.</p>	

(Sheet 4 of 6)

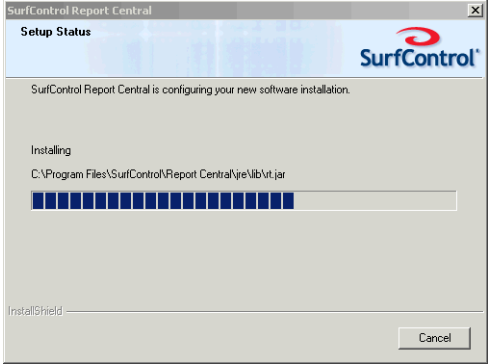

2 INSTALLING REPORT CENTRAL Report Central for Web Filter

Procedure 2-1 Installing Report Central for Web Filter (Continued)

Step	Action	
19	<p>Select an account for the Report Central service:</p> <ul style="list-style-type: none"> If the database is on the local server, you can select Local System Account. If the database is on a remote server, the Local System Account option is unavailable. For the This Account option, enter a valid Windows user name and password for the server where the database is hosted. <p>Note: The remote account must be part of the Local Administrator group on the local computer.</p> <p>For details of SRC service account/SQL database authentication combinations, see Authentication on page 24.</p>	
20	Click Next .	
21	Click Install to begin copying the Report Central files.	

(Sheet 5 of 6)

Procedure 2-1 Installing Report Central for Web Filter (Continued)

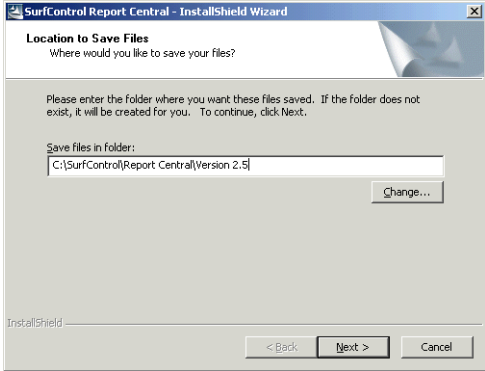
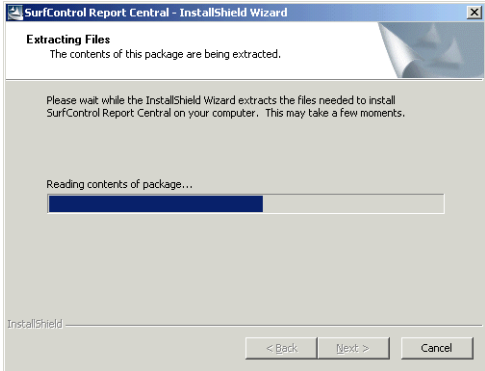

Step	Action	
22	<p>A Setup Status screen shows the progress of the installation. Click Next.</p>	
23	<p>When the installation has completed, click Finish.</p>	

(Sheet 6 of 6)

REPORT CENTRAL FOR E-MAIL FILTER

To install Report Central for SurfControl E-mail Filter, follow [Procedure 2-2](#):

Procedure 2-2 Installing Report Central for E-mail Filter

Step	Action	
1	Run the Report Central executable (example, SRC_v2501.exe) to open the Installation Wizard.	
2	Select the folder in which to save the installation files. Either: <ul style="list-style-type: none"> Click Next to save to the default folder displayed, or Enter or change to a different folder, and then click Next. 	
3	The InstallShield Wizard extracts files and prepares the setup. Note: If some files already exist on your system, an 'Overwrite Protection' pop-up message is displayed.	
4	The Welcome screen is displayed. Click Next .	

(Sheet 1 of 4)

Procedure 2-2 Installing Report Central for E-mail Filter (Continued)

Step	Action	
5	The License Agreement screen is displayed. If you accept the terms of the agreement, select I accept the terms of the license agreement.	
6	Click Next.	
7	The Choose Destination Location screen is displayed. To accept the default destination for the Report Central files, click Next. Alternatively, browse to the location where you want the files to be installed. Click Next.	
8	The Select Features screen is displayed. To install E-mail Filter reports, you need to clear the Web Filter Reports check box, and then click Next.	

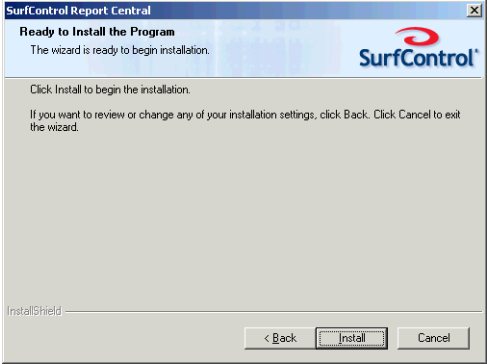
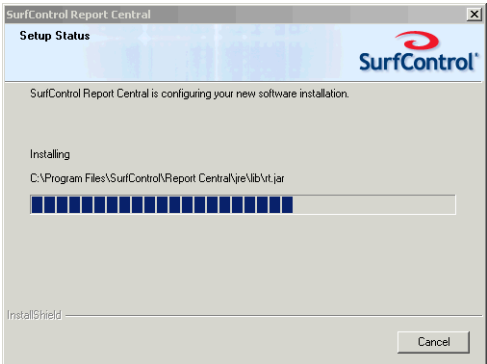

(Sheet 2 of 4)

Procedure 2-2 Installing Report Central for E-mail Filter (Continued)

Step	Action	
9	<p>If no local SQL Server is detected, the Select Database Installation Options screen is displayed. Select to either:</p> <ul style="list-style-type: none"> Install SQL 2005 Express, and then install Report Central using this database server, or Install Report Central using an existing SQL Server. <p>Note: You only need a local database server if you are using Report Central for E-mail Filter.</p>	
10	<p>Create an account for the user who will be administrating Report Central. Enter a username and password, then confirm the password.</p> <p>Note: These details are needed the first time an administrator logs on to Report Central.</p>	
11	Click Next .	
12	<p>Select an account for the Report Central service:</p> <ul style="list-style-type: none"> If the SRC database is on the local server, you can select Local System Account. If the SRC database is on a remote server, the Local System Account option is unavailable. For the This Account option, enter a valid Windows user name and password for the server where the database is hosted. <p>Note: The remote account must be part of the Local Administrator group on the local computer.</p>	
13	Click Next .	

(Sheet 3 of 4)

Procedure 2-2 Installing Report Central for E-mail Filter (Continued)

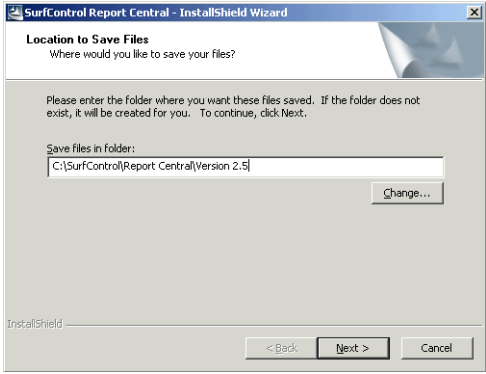
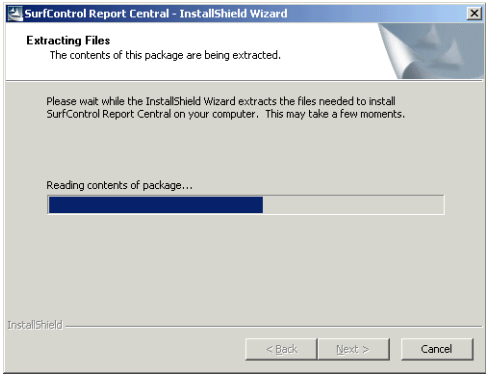

Step	Action	
14	Click Install to begin copying the Report Central files.	
15	A Setup Status screen shows the progress of the installation. Click Next .	
16	When the installation has completed, click Finish .	

(Sheet 4 of 4)

REPORT CENTRAL FOR BOTH WEB FILTER AND E-MAIL FILTER

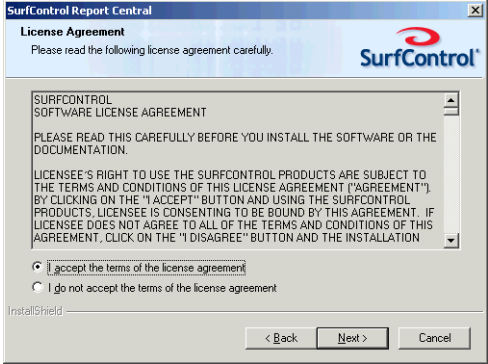
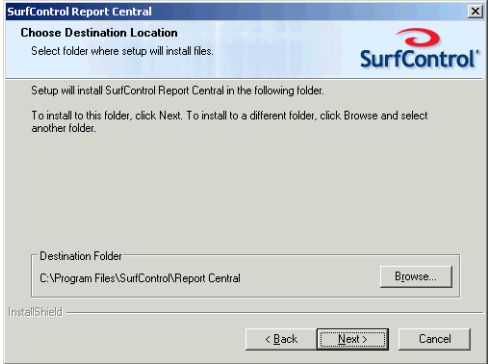
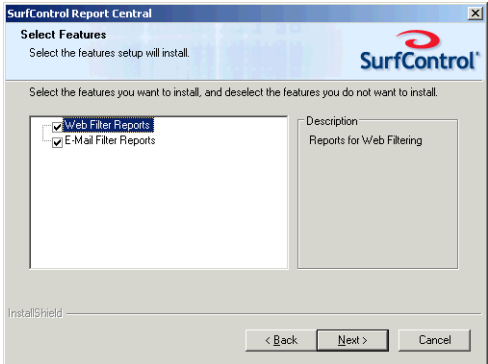
To install SurfControl Report Central for both Web Filter and E-mail Filter at the same time, follow [Procedure 2-3](#)

Procedure 2-3 Installing Report Central for Web and E-mail Filter

Step	Action	
1	Run the Report Central executable (example, SRC_v2501.exe) to open the Installation Wizard.	
2	Select the folder in which to save the installation files. Either: <ul style="list-style-type: none"> Click Next to save to the default folder displayed, or Enter or change to a different folder, and then click Next. 	
3	The InstallShield Wizard extracts files and prepares the setup. Note: If some files already exist on your system, an 'Overwrite Protection' pop-up message is displayed.	
4	The Welcome screen is displayed. Click Next .	

(Sheet 1 of 5)

Procedure 2-3 Installing Report Central for Web and E-mail Filter (Continued)

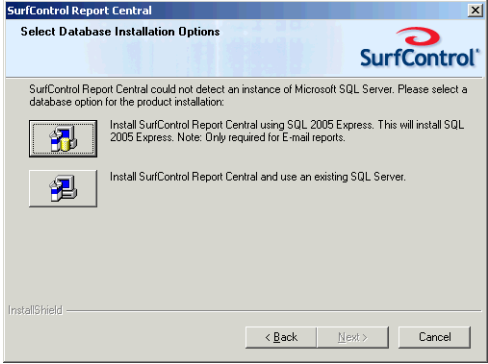
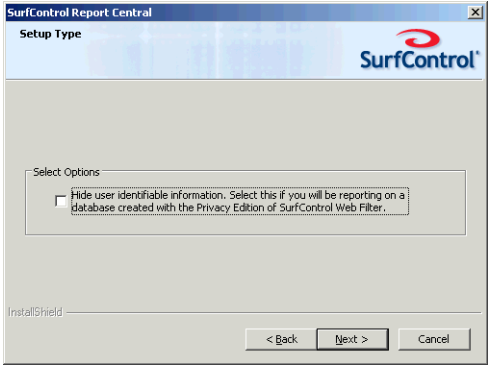
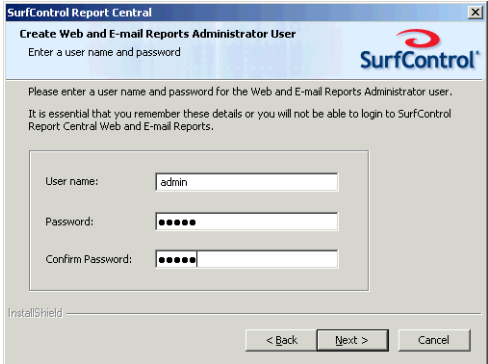
Step	Action	
5	The License Agreement screen is displayed. If you accept the terms of the agreement, select I accept the terms of the license agreement.	
6	Click Next.	
7	The Choose Destination Location screen is displayed. To accept the default destination for the Report Central files, click Next. Alternatively, browse to the location where you want the files to be installed. Click Next.	
8	The Select Features screen is displayed. To install both Web Filter reports and E-mail Filter reports, click Next.	

(Sheet 2 of 5)

2

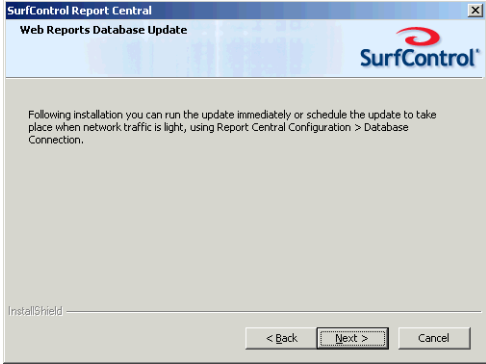
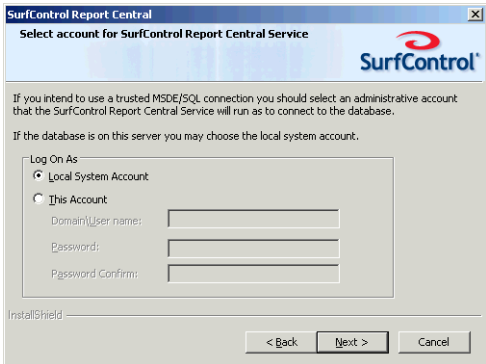
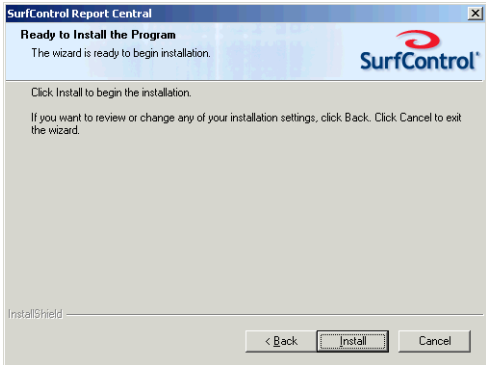
INSTALLING REPORT CENTRAL Report Central for Both Web Filter and E-mail Filter

Procedure 2-3 Installing Report Central for Web and E-mail Filter (Continued)

Step	Action	
9	<p>If no local SQL Server is detected, the Select Database Installation Options screen is displayed. Select to either:</p> <ul style="list-style-type: none"> Install SQL 2005 Express, and then install Report Central using this database server, or Install Report Central using an existing SQL Server. <p>Note: You only need a local database server if you are using Report Central for E-mail Filter.</p>	
10	<p>The Setup Type screen is displayed. If you are reporting on a database created the with the Privacy Edition of SurfControl Web Filter, you can select this option so that user information is not shown in reports.</p>	
11	Click Next	
12	<p>Create an account for the user who will be administrating Report Central. Enter a username and password, then confirm the password.</p> <p>Note: These details are needed the first time an administrator logs on to Report Central.</p>	
13	Click Next .	

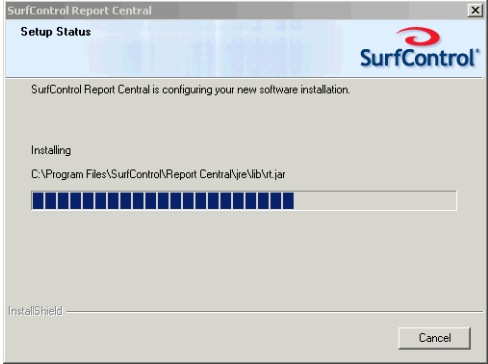
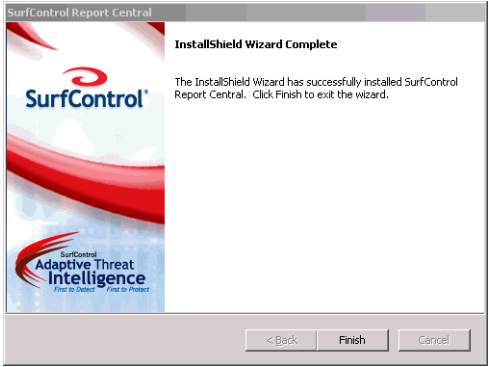
(Sheet 3 of 5)

Procedure 2-3 Installing Report Central for Web and E-mail Filter (Continued)

Step	Action	
14	<p>You will then be reminded to schedule a database update for Web Reports when you have finished installing Report Central.</p> <p>Report Central needs to update the database to enable Drill-Down Reporting and the Threat Dashboard to work.</p> <p>See the <i>SurfControl Report Central for Web Filter Administrator's Guide</i> for information on how to schedule a database update.</p> <p>Click Next.</p>	
15	<p>Select an account for the Report Central service:</p> <ul style="list-style-type: none"> • If the SRC database is on the local server, you can select Local System Account. • If the SRC database is on a remote server, the Local System Account option is unavailable. For the This Account option, enter a valid Windows user name and password for the server where the database is hosted. <p>Note: The remote account must be part of the Local Administrator group on the local computer.</p> <p>For details of SRC service account/SQL database authentication combinations, see Authentication on page 24.</p>	
16	<p>Click Next.</p>	
17	<p>Click Install to begin copying the Report Central files.</p>	

(Sheet 4 of 5)

Procedure 2-3 Installing Report Central for Web and E-mail Filter (Continued)

Step	Action	
18	A Setup Status screen shows the progress of the installation. Click Next .	
19	When the installation has completed, click Finish .	

(Sheet 5 of 5)

Database Connections

To change the account for the SRC service, or configure an SRC Web Filter or E-mail Filter database connection after installation, see the *SurfControl Report Central Administrator's Guide*, chapter 'Configuration', section 'Databases'.

UPGRADING SRC

To upgrade from an earlier version of SRC, follow [Procedure 2-4](#)

Procedure 2-4 Upgrading from an earlier version of SRC

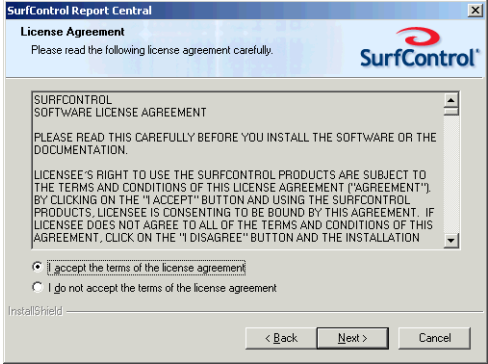
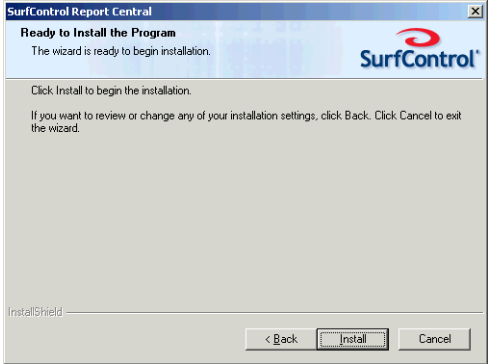
Step	Action	
1	Run the Report Central executable (example, SRC_v2501.exe) to open the Installation Wizard.	
2	Select the folder in which to save the installation files. Either: <ul style="list-style-type: none"> Click Next to save to the default folder displayed, or Enter or change to a different folder, and then click Next. 	
3	The InstallShield Wizard extracts files and prepares the setup. Note: If some files already exist on your system, an 'Overwrite Protection' pop-up message is displayed.	
4	The Welcome screen is displayed. Click Next .	

(Sheet 1 of 3)

2 INSTALLING REPORT CENTRAL

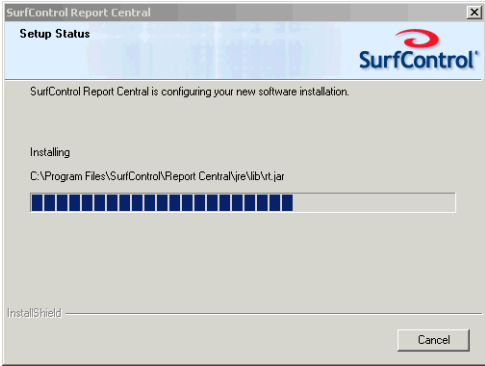
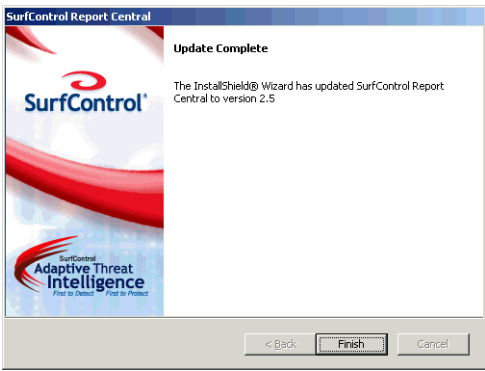
Upgrading SRC

Procedure 2-4 Upgrading from an earlier version of SRC (Continued)

Step	Action	
5	The License Agreement screen is displayed. If you accept the terms of the agreement, select I accept the terms of the license agreement .	
6	Click Next .	
7	Click Install to begin copying the Report Central files.	

(Sheet 2 of 3)

Procedure 2-4 Upgrading from an earlier version of SRC (Continued)

Step	Action	
8	A Setup Status screen shows the progress of the installation. Click Next .	
9	When the installation has completed, click Finish .	

(Sheet 3 of 3)

AUTHENTICATION

The selection of an SRC service account and SQL database authentication must be considered together. [Table 2-1](#) details the possible combinations and required access rights when using SRC service accounts (Local System Account or This Account options), and Windows or SQL database authentication.

Table 2-1 SRC service account/SQL database combinations

		Database Authentication		
		SQL	Windows	
Service Account	Local System Account	SQL Local	Yes	Yes (*2)
		SQL Remote	Yes	No
	This Account - Specified User (*1)	SQL Local	Yes	Yes (*3)
		SQL Remote	Yes	Yes (*3)

*1 – The user specified for the service must have been granted administrator rights on the SRC server.

*2 – This assumes that the local system account has access rights to the SQL server. This is the default installation.

*3 – The user specified for the service must have been granted access rights to the SQL server.

POST-INSTALLATION PROCEDURES

Before opening SurfControl Report Central (SRC), you need to configure your browser to allow pop-ups and cookies from the SRC server, and you need to allocate database disk space for the tempDB file. Also, for SRC for E-mail Filter reports, you need to assign links between the SRC server, the SRC Database server and the E-mail Filter Database server.

POP-UP BLOCKERS

You need to configure your pop-up blocker to allow pop-ups from the Report Central server. If you are using Internet Explorer 6.0:

- 1 Select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.
- 2 Enter the URL of the SRC server
- 3 Click **Add**.

COOKIES

You need to set your browser to allow cookies from the Report Central server. If you are using Internet Explorer 6.0:

- 1 Select **Tools > Internet Options > Privacy tab > Sites**.
- 2 Enter the URL of the SRC server.
- 3 Click **Allow**.

MANAGING DATABASE DISK SPACE

When generating reports, SQL Server can fail to execute SRC queries if the SQL Server tempDB transaction log does not have enough disk space allocated to it. To allocate more disk space, follow [Procedure 2-5](#).

Procedure 2-5 Allocating disk space to the TempDB transaction log file

Step	Action
1	Launch SQL Server Enterprise Manager.
2	Select TempDB from the database list.
3	Right-click TempDB, and then select Properties from the shortcut menu. The TempDB dialog box is displayed.
4	Select the Transaction Log tab.
5	Under Space Allocated (MB) , set the value to a minimum of 25% of your database size.
6	Click OK .

SRC FOR E-MAIL FILTER REPORTS – LINKED SERVERS

When you log in to SRC for E-mail Filter for the first time, the Post Install Configuration welcome screen is displayed. This describes the purpose of the post-installation configuration procedure.

This version of SRC copies data from an E-mail Filter database into an SRC database to increase reporting performance and reduce the load on the E-mail Filter database. To copy the data, you need to create a link between the SRC database server and the E-mail Filter database server. This enables the update process to be automated while remaining secure and easy to manage.

You need to enter details in the following screens to:

- Create a new SRC database, or register an existing SRC database.
- Set up a linked server to copy data from the E-mail Filter database.
- Create a scheduled update task, which automates the process of updating the SRC database.
- Configure SRC database maintenance tasks, such as purging and updating.

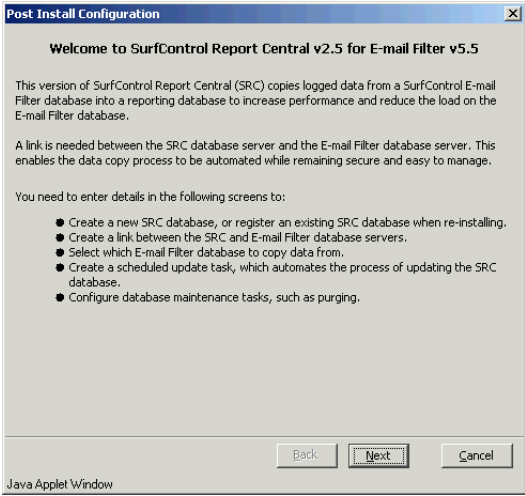
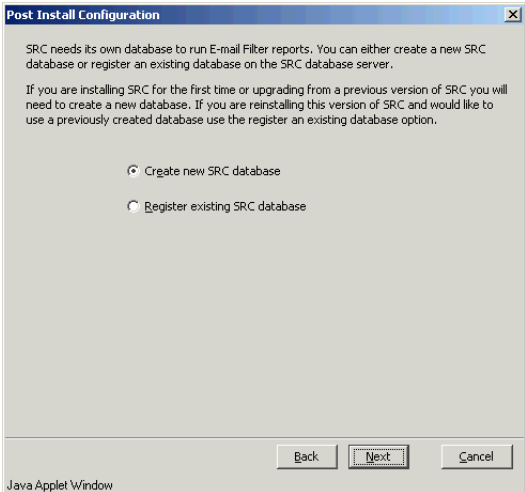
During this procedure, SRC detects the settings of the current E-mail Filter database server. You need to enter the details of a valid E-mail Filter database on this server to create a link between the E-mail Filter database and the SRC database. This link enables the database update and purge tasks to work.



Caution: Initially, you must ensure that the SRC server has direct access to the E-mail Filter Database server for validation checking (user name, password), and to check if the E-mail Filter server contains a valid E-mail Filter database. If the SRC does not have direct access, the link will fail.

The following procedure is for creating a new SRC database with a link to an E-mail Filter database.

Procedure 2-6 SRC for E-mail Filter – Creating a new linked database

Step	Action	
1	<p>The first screen informs you of why you need to create a new SRC database and the details that you will need to supply.</p>	
2	<p>In the first Post Install Configuration screen, select to:</p> <ul style="list-style-type: none"> • Create a new SRC database, or • Register an existing SRC database. <p>This database will be used to contain and order the relevant reporting data that is extracted from one or more E-mail Filter databases.</p>	
3	<p>Click Next</p>	

Procedure 2-6 SRC for E-mail Filter – Creating a new linked database

Step	Action	
4	Enter the following information: <ul style="list-style-type: none"> • A Display Name for the SRC database – This is shown in the main Database Connection screen in SRC. • The Server Name – The name or IP address of the SRC server. • Database Name – The name of the SRC database that you are connecting to. 	
5	Select the Authentication method for the SRC server. Note: SurfControl recommends that you use Windows authentication. If you choose SQL authentication, enter the user name and password of an account with administrator access to the SRC database. Note: A local or remote account must be part of the Local Administrator group on the local computer.	
6	Select to use default SQL Server file locations, or enter your preferred file locations for the Data file and Log file.	
7	If you want your SRC database to use a secure connection, select Use SSL Connection if available .	
8	This screen is for the details of the current E-mail Filter server that contains the data to be copied. <ul style="list-style-type: none"> • If E-mail Filter is installed locally, you are asked to check the details that are displayed automatically in the Display Name: and Server Name: fields. • If E-mail Filter is not installed locally, you are asked to enter the details in the Display Name: and Server Name: fields. Login details: <ul style="list-style-type: none"> • Use current – Select this if you are using the SRC database server login details specified in the previous screen. • Use specific – Select this if you are using the specific E-mail Filter database server login details. 	
9	Click Next	

Procedure 2-6 SRC for E-mail Filter – Creating a new linked database

Step	Action
10	In the following screens, you can schedule the timing of automatic SRC database updates, and the scheduling of archive and purge tasks for the SRC database.
11	<p>Database updates</p> <p>Select:</p> <ul style="list-style-type: none"> • The E-mail Filter database that the SRC database will retrieve data from. • The frequency of the update. <p>Default start time = 01:01 (24 hr clock)</p> <p>At this time, the Scheduler starts the database update.</p> <p>Note: SurfControl recommend that the SRC database update is run when network traffic is light. However, for E-mail Filter reports it can be run regularly during the day.</p> <p>It is important that this update is run for the drill-down reports to show accurate information.</p>
12	<p>Schedule database archive and purge tasks</p> <p>Use this tab to schedule regular archiving and/or purging of the SRC database.</p> <p>Archive Database – Enter the path to the archive folder.</p> <p>Purge Database – Select the data to purge or save.</p> <p>Schedule Settings – To schedule the updates that are needed for drill-down reporting.</p> <p>Enable Scheduling – If you select this check box, all other options become available.</p> <p>Scheduler Time Settings</p> <p>Default start time = 01:01 (24 hr clock)</p> <p>At this time, the Scheduler starts the database maintenance tasks.</p> <p>SurfControl recommend that the database maintenance is run when network traffic is light.</p>

See the *SurfControl Report Central Administrator's Guide*, section 'Databases - E-mail Filter' for details of configuring databases from within SRC.

2 INSTALLING REPORT CENTRAL *Post-Installation Procedures*