Installation Guide

Websense® TRITON® AP-DATA Gateway and Discover
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Installing the Management Server

In this topic:
- System requirements, page 1
- Preparing for installation, page 5
- Installation steps, page 9
- Installing on a virtual machine, page 23

This section describes how to install Websense® TRITON® AP-DATA on a management server. For instructions on installing TRITON AP-WEB and/or TRITON AP-EMAIL components alone or with TRITON AP-DATA, see the Deployment and Installation Center in the Websense Technical Library.

To install TRITON AP-DATA, you perform 2 basic steps.

1. Install the TRITON Infrastructure, page 11.
   This includes the TRITON Manager, settings database, and reporting database.

   This includes the policy engine, crawler, fingerprint repository, forensics repository, and endpoint server.

The system supports installations over Virtual Machines (VM), but Microsoft SQL Server must be present to support the incident and policy database. See Installing on a virtual machine, page 23 for details.

Once you’ve installed management components, you may choose to install TRITON AP-DATA agents on network servers or endpoint client machines. You can also install extra TRITON AP-DATA servers and crawlers for system scaling. See Installing TRITON AP-DATA Agents and Servers, page 31 for more information.

System requirements

The machine that hosts core management components for Websense security solutions is referred to as the TRITON management server.
Subscriptions

To install TRITON AP-DATA and the TRITON Manager, you must have a subscription to either TRITON AP DATA Gateway or TRITON AP-DATA Discover. To use the endpoint agent, you need a subscription to TRITON AP-ENDPOINT DLP as well.

Operating system requirements

The TRITON management server must be running on one of the following operating system environments:

- Windows Server 2008 (64-bit) Standard or Enterprise R2 or R2 SP1
- Windows Server 2012 (64-bit) Standard Edition
- Windows Server 2012 (64-bit) Standard Edition R2

Hardware requirements

The minimum hardware requirements for a TRITON management server vary depending on whether Microsoft SQL Server 2008 R2 Express (used only for evaluations or very small deployments) is installed on the machine.

Notes:

- TRITON AP-DATA allows for either local or remote installation of the forensics repository. If the repository is hosted remotely, deduct 90GB from the TRITON AP-DATA disk space requirements.
- If you choose to install TRITON AP-DATA on a drive other than the main Windows drive (typically C drive), it must have at least 4 GB free on the Windows partition to accommodate the TRITON installer.

With a remote (standard or enterprise) reporting database, the management server must meet the following hardware requirements for stand-alone TRITON AP-DATA installations.

<table>
<thead>
<tr>
<th>Server hardware</th>
<th>Recommended</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>8 CPU cores (2.5 GHz)</td>
<td>4 CPU cores (2.5 GHz)</td>
</tr>
<tr>
<td>Memory</td>
<td>12 GB</td>
<td>12 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>400 GB</td>
<td>140 GB</td>
</tr>
</tbody>
</table>

With local (express) reporting database, it must meet the following hardware:

<table>
<thead>
<tr>
<th>Server hardware</th>
<th>Recommended</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Memory</td>
<td>12 GB</td>
<td>12 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>400 GB</td>
<td>240 GB</td>
</tr>
</tbody>
</table>
Installing the Management Server

Browser requirements

Use any of the following browsers to access the TRITON Manager and Data Security manager.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Internet Explorer*</td>
<td>8, 9, 10, and 11</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>4.4 through 40</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>13 through 44</td>
</tr>
</tbody>
</table>

* Do not use Compatibility View.

Database requirements

Microsoft SQL Server is used to host the reporting database for TRITON AP-DATA and other Websense solutions.

- For evaluations and small deployments, the TRITON Unified Installer can be used to install Microsoft SQL Server 2008 R2 Express on the TRITON management server machine.
  
  Use only the version of SQL Server 2008 R2 Express included in the TRITON Unified Installer.

- Larger organizations are advised to use Microsoft SQL Server Standard or Enterprise. These SQL Server editions cannot reside on the TRITON management server.
  
  SQL Server clustering may be used with all supported standard and enterprise versions of Microsoft SQL Server for failover or high availability.

The supported database engines are:

- SQL Server 2008
  
  All editions except Web, Express, and Compact; all service packs, 32- and 64-bit, but not IA64.

- SQL Server 2008 R2 Express (installed by the TRITON Unified Installer)

- SQL Server 2008 R2
  
  All editions except Web and Compact; all service packs, 32- and 64-bit, but not IA64.

- SQL Server 2012
  
  Standard, Business Intelligence, and Enterprise editions

- SQL Server 2014
## Port requirements

The following ports must be kept open on the TRITON management server:

### Outbound

<table>
<thead>
<tr>
<th>Service</th>
<th>Port Range</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway, TRITON AP-EMAIL</td>
<td>17500-17515* and 17700-17715*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
</tbody>
</table>

### Inbound

<table>
<thead>
<tr>
<th>From</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON AP-ENDPOINT DLP</td>
<td>80</td>
<td>Configuration</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>17443*</td>
<td>Incidents</td>
</tr>
<tr>
<td>TRITON Manager</td>
<td>17447</td>
<td>Processing batch jobs such as scheduled tasks</td>
</tr>
<tr>
<td>TRITON Manager</td>
<td>17446</td>
<td>Translating messages into sender/receiver protocols</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>139</td>
<td>File sharing</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>443</td>
<td>Secure communication</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>445</td>
<td>File sharing</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>8453</td>
<td>User repository</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>8005</td>
<td>Tomcat server</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway, TRITON AP-EMAIL</td>
<td>17500-17515* and 17700-17715*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>TRITON AP-DATA Server, Protector, Web Content Gateway</td>
<td>9443*</td>
<td>Access user interface</td>
</tr>
</tbody>
</table>

* This port should be left open. It is not configurable.
** This range is necessary for load balancing.
*** Used when Web Content Gateway and Email Security Gateway are both installed.
Preparing for installation

Before installing TRITON AP-DATA, make sure that you have completed all of the preparations noted below.

Windows considerations

- Make sure all Microsoft updates have been applied. There should be no pending updates, especially any requiring a restart of the system.
- In addition to the space required by the Websense installer itself, further disk space is required on the Windows installation drive (typically C) to accommodate temporary files extracted as part of the installation process.
  
  For information on minimum disk space requirements, see Hardware requirements, page 2.
- TRITON AP-DATA requires the .NET Framework v4.5 for the installation of Office 365 components and more. If this version is not detected, the system installs it automatically with your permission.

Domain considerations

The servers running the TRITON AP-DATA software can be set as part of a domain or as a separate workgroup. If you have multiple servers or want to perform run commands on file servers in response to discovery, it is best practice to make the server or servers part of a domain.

Do not install TRITON AP-DATA on a domain controller machine, however.

Strict GPOs may interfere and affect system performance, and even cause the system to halt. Hence, when putting TRITON AP-DATA servers into a domain, it is advised to make them part of organizational units that don’t enforce strict GPOs.

Also, certain real-time antivirus scanning can downgrade system efficiency, but that can be relieved by excluding some directories from that scanning (see Antivirus, page 6). Please contact Websense Technical Support for more information on enhancing performance.

Domain Admin privileges

Websense components are typically distributed across multiple machines. Additionally, some components access network directory services or database servers. To perform the installation, it is a best practice to log on to the machine as a user with
domain admin privileges. Otherwise, components may not be able to properly access remote components or services.

**Important**

If you plan to install SQL Server 2008 R2 Express and will use it to store and maintain TRITON AP-WEB data, log on as a domain user to run the TRITON Unified Installer.

### Synchronizing clocks

If you are distributing Websense components across different machines in your network, synchronize the clocks on all machines where a Websense component is installed. It is a good practice to point the machines to the same Network Time Protocol server.

**Note**

If you are installing components that will work with a Websense V-Series appliance, you must synchronize the machine’s system time to the appliance’s system time.

### Antivirus

Disable any antivirus on the machine prior to installing Websense components. Be sure to re-enable antivirus after installation. Exclude the following Websense files from antivirus scans to avoid performance issues:

- The Websense installation folder, which is one of the following:
  - `*:\Program Files\Websense`
  - `*:\Program Files (x86)\Websense`
- `*:\Program Files\Microsoft SQL Server\*.*
- `C:\Documents and Settings\<user>\Local Settings\Temp\*.`
- `%WINDIR%\Temp\*.`
- The forensics repository (configurable; defaults to Websense folder)

### No underscores in FQDN

Do not install Websense components on a machine whose fully-qualified domain name (FQDN) contains an underscore. The use of an underscore character in an FQDN is inconsistent with Internet Engineering Task Force (IETF) standards.

**Note**

Further details of this limitation can be found in the IETF specifications RFC-952 and RFC-1123.
Installing the Management Server

Third-party components

The following third-party components are required to install Microsoft SQL Server 2008 R2 Express. Although the TRITON installer installs these components automatically if they are not found, it is a best practice to install the components before running TRITON Setup if you plan to use SQL Server Express.

- .NET Framework 3.5 SP1
  Because the installer requires .NET 2.0, both .NET 2.0 and 3.5 SP1 are required if you are installing SQL Server Express.
- Windows Installer 4.5
- Windows PowerShell 1.0
- PowerShell is available from Microsoft (www.microsoft.com).

SQL Server

If you are going to use SQL Server Standard or Enterprise in your Websense deployment, do the following before running TRITON Setup:

1. Install SQL Server according to Microsoft instructions. See Database requirements, page 3 for a list of supported versions.

   **Tip**
   If you plan to install the database in a custom folder, see these instructions. Starting with Microsoft SQL Server 2012, the database engine service must have access permissions for the folder where database files are stored.

2. Make sure SQL Server is running.
3. Make sure SQL Server Agent is running.

   **Note**
   If you are using SQL Server 2008 Express R2, SQL Service Broker is used instead of SQL Server Agent.

4. Obtain the SQL Server logon ID and password for a SQL Server Administrator, or for an account that has db_creator server role, SQLAgent role, and db_datareader in msdb. The account must have a sysadmin role. You need this logon ID and password when you install TRITON AP-DATA.
5. Restart the SQL Server machine after installation.
6. Make sure the TRITON management server can recognize and communicate with SQL Server.
7. Install the SQL Server client tools on the TRITON management server. Run the SQL Server installation program, and select Connectivity Only when asked what components to install.
8. Restart the machine after installing the connectivity option. See Microsoft SQL Server documentation for details.

**SQL Server user roles**

Microsoft SQL Server defines SQL Server Agent roles that govern accessibility of the job framework. The SQL Server Agent jobs are stored in the SQL Server msdb database.

The SQL user account must also have dbcreator fixed server role privilege.

Use Microsoft SQL Server Management Studio to grant the database user account the necessary permissions to successfully install the TRITON reporting database.

1. On the SQL Server machine, go to Start > Programs > Microsoft SQL Server 2008 or 2012 > Microsoft SQL Server Management Studio.
2. Log into SQL Server as a user with SQL sysadmin rights.
3. Select the Object Explorer tree, and then go to select Security > Logins.
4. Select the login account to be used during the installation.
5. Right-click the login account and select Properties for this user.
6. Select Server Roles, and then select dbcreator. Also select sysadmin.
7. Select User Mapping and do the following:
   a. Select msdb in database mapping.
   b. Grant membership to one of these roles:
      • SQLAgentUserRole
      • SQLAgentReader Role
      • SQLAgentOperator Role
      • db_datareader
   c. Select wbsn-data-security in database mapping and mark it as “db_owner”.
   d. Select wbsn-data-security-temp-archive in database mapping and mark it as “db_owner”.
   e. Click OK to save your changes.
8. Click OK to save your changes.

**Getting the Websense installer**

The TRITON installer is used to install or upgrade the TRITON management server, TRITON AP-DATA software, reporting components, and SQL Server 2008 R2 Express on supported Windows servers.

Download the installers from mywebsense.com.

- The TRITON installer executable is named WebsenseTRITON81xSetup.exe. Double-click it to start the installation process.
Installing the Management Server

If you have previously run this installer on a machine, and you selected the **Keep installation files** option, you can restart the installer without extracting all of the files a second time.

- Windows Server 2012: Go to the **Start** screen and click the **Websense TRITON Setup** icon.
- Windows Server 2008 R2: Go to **Start > All Programs > Websense > Websense TRITON Setup**.

Note that the files occupy approximately 3 GB of disk space.

**Installation steps**

Do the following to install TRITON AP-DATA on the management server.

1. *Launch the installer, page 9*
2. *Install the TRITON Infrastructure, page 11*
3. *Install TRITON AP-DATA management components, page 18*

**Launch the installer**

1. Log on to the installation machine with an account having **domain** and **local** administrator privileges.

   **Important**

   Do not change this account after installation. Be sure it’s a dedicated account that you want installed services to use when interacting with the operating system—the service account. If you must change the account, contact Websense Technical Support first.

2. Double-click the installer file, **WebsenseTRITON81xSetup.exe**, to launch the Websense TRITON Setup program.

   A progress dialog box appears, as files are extracted.
3. On the **Welcome** screen, click **Start**.

4. On the **Subscription Agreement** screen, select **I accept this agreement** and then click **Next**.

5. On the **Installation Type** screen, select **TRITON Manager** and then select **TRITON AP-DATA**. The TRITON Manager is also required for TRITON AP-ENDPOINT DLP.
6. You are asked if you want to use the Email Gateway virtual appliance to provide DLP for cloud-based email applications such as Microsoft Exchange Online. If so, select **Install Email Gateway virtual appliance on-premises management component**. At the end of the installation process, an Email Gateway installer will launch. Refer to Chapter 2 for instructions on setting up the appliance.

7. In the **Summary** screen, click **Next** to continue the installation. TRITON Infrastructure Setup launches.

### Install the TRITON Infrastructure

1. On the TRITON Infrastructure Setup **Welcome** screen, click **Next**.

2. On the **Installation Directory** screen, specify the location where you want TRITON Infrastructure to be installed and then click **Next**.

   **Important**
   The full installation path must use only ASCII characters. Do not use extended ASCII or double-byte characters.

   - To accept the default location (recommended), simply click **Next**.
   - To specify a different location, click **Browse**.

3. On the **SQL Server** screen, specify the location of your database engine and the type of authentication to use for the connection. Also specify whether to encrypt communication with the database.
Installing the Management Server

Select **Use existing SQL Server on this machine** if the Websense installer has already been used to install SQL Server 2008 R2 Express on this machine.

Select **Install SQL Server Express on this machine** to install SQL Server 2008 R2 Express on this machine.

When this option is selected, .NET 3.5 SP1, Powershell 1.0, and Windows Installer 4.5 are installed automatically if they are not found on the machine. These are required for SQL Server 2008 R2 Express.

A default database instance named `mssqlserver` is created, by default. If a database instance with the default name already exists on this machine, an instance named `TRITONSQL2K8R2X` is created instead.

If .NET 3.5 SP1 is not found on the machine, the installer needs access to windowsupdate.microsoft.com. If anything blocks this machine from accessing the site, SQL Server Express cannot be installed.

In some cases, you are prompted to reboot the machine after installing SQL Server Express. If you do, to restart the installer:

- Windows Server 2012: Go to the **Start** screen and click the **Websense TRITON Setup** icon.
- Windows Server 2008 R2: Go to **Start > All Programs > Websense > Websense TRITON Setup**.

Select **Use the SQL Server database installed on another machine** to specify the location and connection credentials for a database server located elsewhere in the network.

Enter the **Hostname or IP address** of the SQL Server machine, including the instance name, if any.

- If you are using a named instance, the instance must already exist.
• If you are using SQL Server clustering, enter the virtual IP address of the
cluster. Also provide the Port used to connect to the database (1433, by default).
See System requirements, page 1, to verify your version of SQL Server is
supported.

After selecting one of the above options, specify an authentication method and
account information:

  Select the Authentication method to use for database connections: SQL
  Server Authentication (to use a SQL Server account) or Windows
  Authentication (to use a Windows trusted connection).

  Next, provide the User Name or Account and its Password. This account
must be configured to have system administrator rights in SQL Server. For
TRITON AP-DATA, use an account with the sysadmin role. If you are using
SQL Server Express, sa (the default system administrator account) is
automatically specified (this is the default system administrator account).

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The system administrator account password cannot contain single or double quotes.</td>
</tr>
</tbody>
</table>

When you click Next, connection to the database engine is verified. If the
connection test is successful, the next installer screen appears.

If the test is unsuccessful, the following message appears:

Unable to connect to SQL
Make sure the SQL Server you specified is currently running. If it is running,
verify the access credentials you supplied.

Click OK to dismiss the message, verify the information you entered, and click
Next to try again.
4. On the **Server & Credentials** screen, select the IP address of this machine and specify network credentials to be used by the TRITON Manager.

- Select an **IP address** for this machine. If this machine has a single network interface card (NIC), only one address is listed. Use the IP address selected to access the TRITON Manager (via Web browser). Also specify this IP address to any Websense component that needs to connect to the TRITON management server.

If you chose to install SQL Server 2008 R2 Express, if you install TRITON AP-WEB or TRITON AP-EMAIL Log Server on another machine, specify this IP address for the database engine location.

- Specify the **Server or domain** of the user account to be used by TRITON Infrastructure and the TRITON Manager. The server/host name cannot exceed 15 characters.

- Specify the **User name** of the account to be used by the TRITON Manager.

- Enter the **Password** for the specified account.
5. On the **Administrator Account** screen, enter an email address and password for the default TRITON Manager administration account: **admin**. These are the credentials you will use to log onto the TRITON Manager, regardless of the products you own. The password must:

- Be at least 8 characters
- Contain upper case characters
- Contain lower case characters
- Contain numbers
- Contain non-alphanumeric characters

When you are finished, click **Next**.

System notification and password reset information is sent to the email address specified (once SMTP configuration is done; see next step).

It is a best practice to use a strong password as described on screen.
6. On the **Email Settings** screen, enter information about the SMTP server to be used for system notifications and then click **Next**. You can also configure these settings after installation in the TRITON Manager.

**Important**

If you do not configure an SMTP server now and you lose the **admin** account password (set on previous screen) before the setup is done in the TRITON Manager, the “Forgot my password” link on the logon page does not provide password recovery information. SMTP server configuration must be completed before password recovery email can be sent.

- **IP address or hostname**: IP address or host name of the SMTP server through which email alerts should be sent. In most cases, the default **Port** (25) should be used. If the specified SMTP server is configured to use a different port, enter it here.
- **Sender email address**: Originator email address appearing in notification email.
- **Sender name**: Optional descriptive name that can appear in notification email. This is can help recipients identify this as a notification email from the TRITON Manager.
7. On the **Pre-Installation Summary** screen, verify the information and then click **Next** to begin the installation.

---

**Warning**
If you chose to install SQL Server Express, depending on whether certain Windows prerequisites are installed, your machine may be automatically restarted up to two times during the installation process. Restarts are not required if the prerequisites are already installed.

---

**Note**
When you click **Next**, if you chose to install SQL Server Express on this machine, it may take a couple minutes for the next screen to appear. Wait for the next screen, then see the next step below.

---

8. If you chose to install SQL Server Express, .NET Framework 3.5 SP1, PowerShell 1.0, and Windows Installer 4.5 will be installed if not already present. Wait for Windows to configure components.

   a. If the following message appears during this process, click **OK**:

   
   *Setup could not restart the machine. Possible causes are insufficient privileges, or an application rejected the restart. Please restart the machine manually and setup will restart.*

   b. Websense installer starts again. In the TRITON Infrastructure Setup **Welcome** screen, click **Next**.

   c. The **Ready to Resume EIP Infra installation** screen appears. Click **Next**.

---

**Note**
When you click **Next**, if you chose to install SQL Server it may take a couple minutes for the next screen to appear. Wait for the next screen, then see the next step below.

---

9. If you chose to install SQL Server Express on this machine, SQL Server 2008 R2 Setup is launched. Wait for it to complete.

   The Setup Support Files screen appears and then an Installation Progress screen appears. Wait for these screens to complete automatically. It is not necessary to click or select anything in these screens.

   Note that it may take approximately 10-15 minutes for the SQL Server 2008 R2 Express installation to complete.
10. Next, the **Installation** screen appears. Wait until all files have been installed. If the following message appears, check whether port 9443 is already in use on this machine:

```
Error 1920. Server 'Websense TRITON Central Access' (EIPManagerProxy) failed to start. Verify that you have sufficient privileges to start system services.
```

If port 9443 is in use, release it and then click **Retry** to continue installation.

11. On the **Installation Complete** screen, click **Finish**.

You are returned to the Installer Dashboard and, after a few seconds, the TRITON AP-WEB component installer launches.

**Install TRITON AP-DATA management components**

1. When the TRITON AP-DATA installer is launched, a **Welcome** screen appears. Click **Next** to begin TRITON AP-DATA installation.

```
Welcome to the TRITON AP-DATA 8.00.125 installation wizard. It will guide you through the process of installing TRITON AP-DATA components on this machine.

Click Next to begin.
```

**Note**

If any prerequisites are not found on this machine, the TRITON AP-DATA installer installs it.
2. On the Select Components screen, click Next to accept the default selections.

![Select Components Screen]

**Note**
If there is insufficient RAM on this machine for TRITON management server components, a message appears. Click OK to dismiss the message. You are allowed to proceed with the installation. However, it is a best practice to install only if you have sufficient RAM.

3. If prompted, click OK to indicate if services such as SMTP will be enabled. Required Windows components will be installed. You may need access to the operating system installation disc or image.

4. On the Fingerprinting Database screen, accept the default location or use the Browse button to specify a different location.
   Note that you can install the Fingerprinting database to a local path only.
5. If your SQL Server database is on a remote machine, you are prompted for the name of a temporary folder. This screen defines where the system should store temporary files during archive processing as well as system backup and restore. Archiving lets you manage the size of your incident database and optimize performance. Backup lets you safeguard your policies, forensics, configuration, data, fingerprints, encryption keys, and more.

Before proceeding, create a folder in a location that both the database and TRITON management server can access. (The folder must exist before you click Next.) On average, this folder will hold 10 GB of data, so choose a location that can accommodate this.
Installing the Management Server

On the **Temporary Folder Location** screen, complete the fields as follows:

- **Enable incident archiving and system backup**: Check this box if you plan to archive old or aging incidents and perform system backup or restore. This box does not appear when you run the installer in Modify mode and perform a disaster recovery restore operation.

- **From SQL Server**: Enter the path that the SQL Server should use to access the temporary folder. For best practice, it should be a remote UNC path, but local and shared network paths are supported. For example: `c:\folder` or `\10.2.1.1\folder`. Make sure the account used to run SQL has write access to this folder.

- **From TRITON management server**: Enter the UNC path and credentials the management server should use to access the temporary folder. For example: `\10.2.1.1\folder`. Enter a user name and password for a user who is authorized to access this location.

To grant this permission, issue the following T-SQL commands on the SQL Server instance:

```sql
USE master
GRANT BACKUP DATABASE TO <user>
GO
```

After installation of TRITON AP-DATA components, you can revoke this permission:

```sql
USE master
REVOKE BACKUP DATABASE TO <user>
GO
```
6. In the **Local Administrator** screen, create an account for the local administrator user on this server. Supply the user name and password to use to access this server during installation and operation. Use this same administrator wherever TRITON AP-DATA components are installed. The server/host name portion of the user name cannot exceed 15 characters. The password must:

- Be at least 8 characters
- Contain upper case characters
- Contain lower case characters
- Contain numbers
- Contain non-alphanumeric characters
7. In the **Installation Confirmation** screen, click **Install** to begin installation of TRITON AP-DATA components.

8. If the following message appears, click **Yes** to continue the installation:

   *TRITON AP-DATA needs port 80 free.*
   *In order to proceed with this installation, DSS will free up this port.*
   *Click Yes to proceed OR click No to preserve your settings.*

   Clicking **No** cancels the installation.
   A similar message for port 443 may appear. Click **Yes** to continue or **No** to cancel the installation.

9. The **Installation** progress screen appears. Wait for the installation to complete.

10. When the **Installation Complete** screen appears, click **Finish** to close the TRITON AP-DATA installer.

11. If no other TRITON Manager module is chosen for installation, you are returned to the Modify Installation dashboard. Installation is complete.
   Otherwise, you are returned to the Installer Dashboard and the next component installer is launched.

   For information on installing other TRITON AP-DATA components, such as the protector, mobile agent, or endpoint client, see *Installing TRITON AP-DATA Agents and Servers*, page 31.

### Installing on a virtual machine

TRITON AP-DATA supports installations on Virtual Machines (VM), but Microsoft SQL Server must be present to support the incident and policy database. See *System requirements*, page 1, for supported versions of SQL Server. If you are performing a clean install of TRITON AP-DATA, SQL Server 2008 R2 Express is included.
Installing the Management Server

If you have a subscription to TRITON AP-WEB, be sure to select both the TRITON AP-WEB and TRITON AP-DATA management modules when creating the TRITON management server VM.

If you have a subscription to TRITON AP-EMAIL, select both the TRITON AP-EMAIL and TRITON AP-DATA management modules when creating the TRITON management server VM.

The following VM platforms are supported. You can obtain them from the VMware site: www.vmware.com.

- VMware ESXi 3.5 update 2
- VMware ESXi 4 update 1
- VMware ESXi 5.0 and 5.1

---

**Note**

While downloading ESXi, a license key is generated and displayed on the download page. Make a note of this license key for use during installation.

---

Before installing Websense modules on a VM via ESXi, ensure that your VMware tools are up to date. All of your hardware must be compatible with VMware ESXi. In addition, ensure that the following hardware specifications are met:

<table>
<thead>
<tr>
<th>VMware Server</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>At least 4 cores 2.5 GHz (for example, 1 QuadXeon 2.5 GHz). 8 cores are required if you are installing the TRITON AP-WEB, TRITON AP-DATA, and TRITON AP-EMAIL managers</td>
</tr>
<tr>
<td>Disk</td>
<td>300 GB, 15 K RPM, RAID 10</td>
</tr>
<tr>
<td>Memory</td>
<td>8 GB (12 GB if you are installing the TRITON AP-WEB, TRITON AP-DATA, and TRITON AP-EMAIL managers)</td>
</tr>
<tr>
<td>NICs</td>
<td>2*1000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VMware Infrastructure Client</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>At least 500 MHz</td>
</tr>
<tr>
<td>Disk storage</td>
<td>150 MB free disk space required for basic installation.</td>
</tr>
<tr>
<td></td>
<td>An additional 55 MB free on the destination drive during installation</td>
</tr>
<tr>
<td></td>
<td>100 MB free on the drive containing the %temp% folder</td>
</tr>
<tr>
<td>Memory</td>
<td>512 MB</td>
</tr>
<tr>
<td>Networking</td>
<td>Gigabit Ethernet recommended</td>
</tr>
</tbody>
</table>
Installing the Management Server

Installing the ESXi platform

1. Download the version of ESXi that you want to use from [www.vmware.com](http://www.vmware.com).
2. Once the download is complete, burn the download file to a CD.
3. On the machine that will host your VMware server, insert the ESX Server CD into the CD drive.
4. Set the BIOS to boot from the CD.
5. Follow the instructions in the installer to complete the installation process.
6. When the installation has finished, remove the CD and reboot the host machine.

Customizing ESXi

We recommend that you customize the ESXi platform as follows:

- Assign a password to the root account.
- Set up a management IP address for the ESXi server.
  - By default the management IP address is dynamically obtained using DHCP. However, we recommend that you set up a static IP address.

To configure the ESXi platform:

1. Press **F2** to access the Customize System screen.
2. Select **Configure Password**, and enter a password for the root account.
3. To set up a static IP address, select the **Configure Management Network** menu.
4. Select **IP Configuration**, and on the screen that appears enter the following information:
   - Management IP address
   - Subnet mask
Installing the Management Server

- Default gateway
5. From the **Configure Management Network** menu, select **DNS Configuration**.
6. Configure static DNS information by entering the following:
   - Host name (fully qualified)
   - Primary and secondary DNS server addresses
7. Reboot the server.

**Installing the VMware Client**

---

**Note**
The VMware client for ESX 4i is called the vSphere Client. Although the instructions in this section refer to the VMware Infrastructure Client that is available with ESX 3.5i, all instructions also apply to the vSphere Client.

---

The VMware Infrastructure Client (VI Client) manages the ESXi platform. Install the client on a Windows machine with network access to the ESXi server.

1. On the machine where you intend to install the client, open a browser and access the ESXi server using HTTPS and the management IP address you entered in the previous section (for example, https://10.15.21.100). If you see an error page, accept the server certificate.
2. On the VMware ESX Server Welcome page, click the **Download VMware Infrastructure Client** link.
3. Download and run the client installation program.

**Installing the license and setting the time**

You received your license number as part of the ESXi download.

1. Start the VI Client by selecting **Start > Programs > VMware > VMware Infrastructure Client**.
2. Connect to your ESXi server using the IP address you set up during configuration. For user credentials, enter the user name **root** and the password that you set up for the root account.
3. On the **Configuration** tab, select **Licensed Features**.
4. To the right of the **License Source** label, click the **edit** link.

5. Select **Use Serial Number**, and enter your license number in the field provided. Then click **OK**.

6. On the **Configuration** tab, select **Time Configuration**.

7. Select **Properties**, and then set your server’s time. Click **OK** when done.

### Configuring an additional NIC

When setting up the ESXi server, you configured one NIC as the ESXi platform management interface. This NIC can also be used by the virtual machines. However, this setup requires an additional NIC, for redundancy and to perform load balancing.

To set up an additional NIC:

1. On the **Configuration** tab, select **Networking**.
When the system was started, the ESXi platform configured the server to have one virtual switch (vSwitch) using the management NIC. With this configuration, the Networking screen should look similar to the one below.

2. To add a new NIC to the virtual switch, select the Properties link.
3. In the Properties popup window, select the Network Adapters tab and click Add. The Add Adapter Wizard opens.

4. Select the adapter you want from the list, then click Next twice.
5. Click Finish to close the wizard, then close the Properties window.
Installing the Management Server

After adding the additional network adapter to the virtual switch, the network layout should look similar to the one below:

Creating the TRITON AP-DATA virtual machine

1. In the VI Client, select the Summary tab and then select New Virtual Machine. The New Virtual Machine Wizard opens.
2. Select Custom, and click Next.
3. Set the machine name to be TRITON management server, and click Next.
4. Select the only available datastore (datastore1), and click Next.
5. Select Microsoft Windows as the guest operating system, and set the version to Microsoft Windows Server 2008 R2 (64 bit).
6. Click Next.
7. Set the number of virtual processors according to the TRITON management server for your deployment, and click Next. See System requirements, page 1, for more information.
8. Set the virtual machine memory to a minimum of 8 GB, depending on your deployment, and click Next. See System requirements, page 1, for more information.
9. Accept the defaults on the Network page and the I/O Adapters page, clicking Next to continue.
10. Select Create a new virtual disk and click Next.
11. Set the disk capacity to 150 GB.
12. Click Next to progress through the Advanced Options page without changing the defaults.
13. Review your configuration and then click Finish.
Setting the CPU affinity

Once you have configured the virtual machine, set its dedicated CPUs as follows:

1. In the VI Client, select the virtual machine you just created from the tree on the left.
2. Select the Summary view, and click Edit Settings.
3. Select the Resources tab.
4. Select Advanced CPU.
5. In the Scheduling Affinity group, select Run on processor(s), then select processors zero and one.
6. Click OK.

Installing the operating system and VMware tools

Install the operating system on your virtual machine, and then reboot. We recommend that you also install the VMware tools before installing the TRITON management server. To do this:

1. Log on to the virtual machine.
2. From the VI Client, select Inventory > Virtual Machine > Install/Upgrade VMware Tools.
3. Follow the instructions on screen to install the tools.
4. Follow the instructions above to install the TRITON management server on your virtual machine.
Installing TRITON AP-DATA Agents and Servers

Once you’ve installed TRITON AP-DATA on the TRITON management server (as described in Installing the Management Server, page 1), you can install other TRITON AP-DATA components as needed. In larger deployments, you might install supplemental TRITON AP-DATA servers, crawlers, or policy engines. In some scenarios, you might install the TRITON AP-DATA protector and/or any number of TRITON AP-DATA agents such as the mobile agent for monitoring email being synchronized to mobile phones and tablets.

TRITON AP-DATA agents are installed on the relevant servers to enable the system to access the data necessary to analyze the traffic from these servers. TRITON AP-ENDPOINT DLP enables administrators to analyze content within a user’s working environment (PC, laptop, etc.) and block or monitor policy breaches.

Important
Before you install a TRITON AP-DATA component—for example, a supplemental server or agent—make sure that the TRITON infrastructure is already installed in your network along with the TRITON AP-DATA management components.

Do not install any TRITON AP-DATA component on a domain controller.

◆ Installing supplemental TRITON AP-DATA servers, page 32
◆ Installing TRITON AP-DATA agents, page 37
Installing supplemental TRITON AP-DATA servers

In this topic:

- Operating system requirements, page 32
- Hardware requirements, page 33
- Software requirements, page 33
- Hardware requirements, page 33
- Installation steps, page 35

Medium to large enterprises may require more than one TRITON AP-DATA server to perform content analysis efficiently. Having multiple TRITON AP-DATA servers allows your organization to grow, improves performance, and allows for custom load balancing.

Supplemental TRITON AP-DATA server installations include:

- A policy engine
- Secondary fingerprint repository (the primary is on the management server)
- Endpoint server
- Optical Character Recognition (OCR) server
- Crawler

Notes:

In production environments, do not install a TRITON AP-DATA server on a Microsoft Exchange, TMG, or print server. These systems require abundant resources.

Operating system requirements

Supplemental TRITON AP-DATA servers must be running on one of the following operating system environments:

- Windows Server 2008 (64-bit) Standard or Enterprise, R2 or R2 SP1
- Windows Server 2012 (64-bit) Standard Edition
- Windows Server 2012 (64-bit) Standard Edition R2
Virtualization systems

Like TRITON management servers, secondary TRITON AP-DATA servers are supported on Hyper-V over Windows Server 2008 R2 or Windows Server 2012.

Hardware requirements

Supplemental TRITON AP-DATA servers must meet the following hardware requirements.

<table>
<thead>
<tr>
<th>Server hardware</th>
<th>Minimum requirements</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>2 Dual-core Intel Xeon processors (2.0 GHz) or AMD equivalent</td>
<td>2 Quad-core Intel Xeon processors (2.0 GHz) or AMD equivalent</td>
</tr>
<tr>
<td>Memory</td>
<td>4 GB</td>
<td>8 GB</td>
</tr>
<tr>
<td>Hard drives</td>
<td>Four 72 GB</td>
<td>Four 146 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>72 GB</td>
<td>292 GB</td>
</tr>
<tr>
<td>Free space</td>
<td>70 GB</td>
<td>70 GB</td>
</tr>
<tr>
<td>Hardware RAID</td>
<td>1</td>
<td>1 + 0</td>
</tr>
<tr>
<td>NICs</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Software requirements

The following requirements apply to all TRITON AP-DATA servers:

- For optimized performance, verify that the operating system’s file cluster is set to 4096B. For more information, see the Websense knowledge article: “File System Performance Optimization.”
- Windows installation requirements:
  - Set the partition to 1 NTFS Partition. For more information, see the Websense knowledge-base article: “File System Performance Optimization.”
  - Regional Settings: should be set according to the primary location. If necessary, add supplemental language support and adjust the default language for non-Unicode programs.
  - Configure the network connection to have a static IP address.
  - The TRITON management server host name must not include an underscore sign. Internet Explorer does not support such URLs.
  - Short Directory Names and Short File Names must be enabled. (See [http://support.microsoft.com/kb/121007](http://support.microsoft.com/kb/121007).)
  - Create a local administrator to be used as a service account. If your deployment includes more than one TRITON AP-DATA server, use a domain account (preferred), or the use same local user name and password on each machine. Do not change the service account.
  - Be sure to set the system time accurately on the TRITON management server.
Antivirus

Exclude the following directories from antivirus scanning:

- The folder where TRITON AP-DATA was installed. By default, this is one of the following:
  - Program Files\Websense\*
  - Program Files (x86)\Websense\*.*
- *:\Inetpub\mailroot\*.* - (typically at the OS folder)
- *:\Inetpub\wwwroot\*.* - (typically at the OS folder)
- C:\Documents and Settings\<user>\Local Settings\Temp\*.*
- %WINDIR%\Temp\*.*
- The forensics repository (configurable; defaults to Websense folder)

Note

This document lists the default installation folders. You can configure the software to install to other locations.

The FP-Repository folder is usually located inside the installation folder.

Port requirements

The following ports must be kept open for supplemental TRITON AP-DATA servers:

### Outbound

<table>
<thead>
<tr>
<th>To</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management</td>
<td>17443</td>
<td>Incidents</td>
</tr>
<tr>
<td>server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRITON management</td>
<td>17500-</td>
<td>Consecutive ports that allow communication</td>
</tr>
<tr>
<td>server</td>
<td>17515*</td>
<td>with Websense agents and machines.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.

### Inbound

<table>
<thead>
<tr>
<th>From</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management</td>
<td>8892</td>
<td>Syslog</td>
</tr>
<tr>
<td>server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRITON management</td>
<td>139</td>
<td>File sharing</td>
</tr>
<tr>
<td>server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRITON management</td>
<td>445</td>
<td>File sharing</td>
</tr>
<tr>
<td>server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRITON management</td>
<td>17500-</td>
<td>Consecutive ports that allow communication</td>
</tr>
<tr>
<td>server</td>
<td>17515</td>
<td>with Websense agents and machines.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.
Installing TRITON AP-DATA Agents and Servers

Installation steps

1. Download the Websense installer (WebsenseTRITON81xSetup.exe) from mywebsense.com.
2. Launch the installer on the machine where you want to install the supplemental server.
3. Accept the license agreement.
4. Select Custom.
5. Click the Install link for TRITON AP-DATA.
6. On the Welcome screen, click Next to begin the installation.
7. In the Destination Folder screen, specify the folder into which to install the server software.
   The default destination is C:\Program Files or Program Files (x86)\Websense\Data Security. If you have a larger drive, it is used instead. Large removable drives may be detected by the system as a local drive and used as the default. Do not install on removable media.

   Important
   The full installation path must use only ASCII characters. Do not use extended ASCII or double-byte characters.

   Note
   Regardless of what drive you specify, it must have a minimum of 4 GB of free disk space on the Windows partition for the TRITON installer.

9. The Fingerprinting Database screen appears. To choose a location other than the default shown, use the Browse button.
10. In the Server Access screen, select the IP address to identify this machine to other Websense components.
11. In the Register with the TRTION AP-DATA Server screen specify the location and log on credentials for the TRITON management server.
   FQDN is the fully-qualified domain name of a machine. The credentials should be for a TRITON AP-DATA administrator with System Modules permissions.
12. In the Local Administrator screen, supply a user name and password as instructed on-screen. The server/host name portion of the user name cannot exceed 15 characters.
13. If you installed a Lotus Notes client on this machine so you can perform fingerprinting and discovery on a Lotus Domino server, the Lotus Domino Connections screen appears.
If you plan to perform fingerprinting or discovery on your Domino server, complete the information on this page.

---

**Important**

Before you complete the information on this screen, make sure that you:

- Create at least one user account with administrator privileges for the Domino environment. (Read permissions are not sufficient.)
- Be sure that the Lotus Notes installation is done for “Anyone who uses this computer.”
- Connect to the Lotus Domino server from the Lotus Notes client.

a. On the **Lotus Domino Connections** page, select the check box labeled **Use this machine to scan Lotus Domino servers**.

b. In the **User ID file** field, browse to one of the authorized administrator users, then navigate to the user’s **user.id** file.

---

**Note**

Select a user that has permission to access all folders and Notes Storage Format (NSF) files of interest, otherwise certain items may not be scanned.

c. In the **Password** field, enter the password for the authorized administrator user.

14. In the **Installation Confirmation** screen, if all the information entered is correct, click the **Install** button to begin installation.

Installation may seem to take a long time. Unless a specific error or failure message appears, allow the installer to proceed.

If the following message appears, click **Yes** to continue the installation:

*TRITON AP-DATA needs port 80 free.*
*In order to proceed with this installation, TRITON AP-DATA will free up this port.*
*Click Yes to proceed OR click No to preserve your settings.*

Clicking **No** cancels the installation.

A similar message for port 443 may appear. Click **Yes** to continue or **No** to cancel the installation.

15. Once installation is complete, the **Installation Complete** screen appears to inform you that your installation is complete. Click **Finish**.

16. Log onto the Data Security manager and click **Deploy** to fully connect the supplemental server with the management server.
Installing TRITON AP-DATA agents

Below is a summary of the TRITION AP-DATA agents.

With the exception of the protector, mobile agent, and TRITON AP-ENDPOINT, TRITON AP-DATA agents are installed using the Custom option of the standard Websense installer.

Note that the various agents become available only when you are performing the installation on a required server. For example, the FCI agent is only shown as an option on machines with Microsoft FSRM installed.

Click the links to learn more about each agent, including where to deploy it, installation prerequisites, installation steps, special considerations, and best practices.

<table>
<thead>
<tr>
<th>Agent</th>
<th>Description</th>
<th>When to Use</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protector</td>
<td>The protector is a standard part of TRITON AP-DATA deployments. It is a physical or soft appliance with a policy engine and a fingerprint repository, and it supports analysis of SMTP, HTTP, FTP, plain text, and IM traffic that doesn't use SSL. For blocking HTTPS traffic, the protector can integrate with proxies using ICAP. See Protector, page 40 for more information.</td>
<td>Monitor/block: network email Monitor: HTTP, FTP, plain text, IM Monitor/block: HTTP via ICAP</td>
<td>On premises</td>
</tr>
<tr>
<td>Web Content Gateway</td>
<td>A Web Content Gateway module is included with TRITON AP-DATA Gateway. It provides DLP policy enforcement for the web channel, including decryption of SSL traffic. This core AP-DATA component permits the use of custom policies, fingerprinting, and more. It also makes use of the Websense URL category database to define DLP policies for the web channel. This gateway is available as a soft appliance. Web Content Gateway is also included in TRITON AP-WEB. In addition to the capabilities described above, this gateway provides URL filtering/category, content security, web policy enforcement, and more. AP-WEB can be a physical or soft appliance. See Web Content Gateway, page 51 for installation instructions.</td>
<td>Monitor/block: HTTP/S with SSL decryption</td>
<td>On premises</td>
</tr>
</tbody>
</table>
TRITON AP-DATA Agents and Servers

<table>
<thead>
<tr>
<th>Agent</th>
<th>Description</th>
<th>When to Use</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON AP-EMAIL</td>
<td>A TRITON AP-DATA policy engine is embedded in TRITON AP-EMAIL. No agent installation is required; however, the policy engine is not active until registered with a TRITON management server. See the Email Security Manager Help for registration instructions.</td>
<td>Monitor/block/quarantine/encrypt: Email traffic</td>
<td>On premises</td>
</tr>
<tr>
<td>Email Gateway for Microsoft Office 365</td>
<td>Email Gateway is a virtual appliance that, when deployed in a Microsoft Azure environment, allows outbound email from Exchange Online to be analyzed for data loss or theft. It is included in a TRITON AP-DATA Gateway subscription. See Email Gateway for Microsoft Office 365, page 68 for more information.</td>
<td>Monitor/block/quarantine/encrypt: Exchange Online email traffic</td>
<td>Microsoft Azure cloud</td>
</tr>
<tr>
<td>Mobile agent</td>
<td>The mobile agent monitors and blocks data downloaded to mobile devices that perform synchronization operations with the Exchange server. With the mobile agent, you can monitor and block data transmitted in email messages, calendar events, and tasks. It is on a Websense appliance, or you can install it on your own hardware. The mobile agent supports ActiveSync, which is a wireless communication protocol used to push resources, such as email, from applications to mobile devices. See Mobile agent, page 105 for more information.</td>
<td>Monitor/block: Exchange ActiveSync email</td>
<td>On premises</td>
</tr>
<tr>
<td>Crawler</td>
<td>The crawler is the name of the agent that performs discovery and fingerprinting scans. The crawler is installed automatically on the TRITON management server and other TRITON AP-DATA servers. If you want to improve scanning performance in high transaction volume environments, you can install it stand-alone on another server as well. See The crawler, page 127 for more information.</td>
<td>Discovery/Fingerprinting</td>
<td>On premises</td>
</tr>
</tbody>
</table>
### Installing TRITON AP-DATA Agents and Servers

<table>
<thead>
<tr>
<th>Agent</th>
<th>Description</th>
<th>When to Use</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCI agent</td>
<td>The FCI agent is installed on a Windows Server 2012 machine running Microsoft File Server Resource Manager (FSRM). It augments the data classification performed using Microsoft File Classification Infrastructure (FCI). See <em>FCI agent</em>, page 120 for more information.</td>
<td>Discovery</td>
<td>Microsoft File Server Resource Manager (FSRM)</td>
</tr>
<tr>
<td>Endpoint agent</td>
<td>The endpoint agent, TRITON AP-ENDPOINT DLP, monitors all data activity on endpoint machines and reports on data at rest on those machines. With the endpoint agent, you can monitor application operations such as cut, copy, paste, and print screen and block users for copying files, or even parts of files, to endpoint devices such as thumb drives, CD/DVD burners, and Android phones. The endpoint agent can also monitor or block print operations as well as outbound web posts and email messages. See <em>Installing and Deploying TRITON AP-ENDPOINT Clients</em> for more information.</td>
<td>Monitor/block: email, printing, application control, LAN control, HTTP/S, removable media</td>
<td>Endpoint devices</td>
</tr>
</tbody>
</table>

### Important

TRITON AP-DATA agents and machines with a policy engine (such as a TRITON AP-DATA Server or Web Content Gateway appliance) must have direct connection to the TRITON management server. When deployed in a DMZ or behind a firewall, the relevant ports must be allowed.
Protector

In this topic:
- When to use the protector, page 40
- Deploying the protector, page 41
- Hardware requirements, page 42
- Port requirements, page 43
- Installing the protector software, page 44
- Configuring the protector, page 51

The protector is a component of TRITON AP-DATA that can monitor and report on web traffic in your organization and act as an MTA to monitor, block, quarantine, and encrypt email traffic.

If desired, you can combine the protector MTA with TRITON AP-DATA Email Gateway for Microsoft Office 365 to offer a combination of on-premises and cloud data protection. Or you can use TRITON AP-EMAIL as your MTA instead.

If you want enforcement over the HTTP/HTTPS channel, you can integrate the protector with a third-party proxy that supports ICAP, or implement the Web Content Gateway instead.

When to use the protector

The protector works in tandem with a TRITON AP-DATA server. The TRITON AP-DATA server provides advanced analysis capabilities, while the protector intercepts network traffic and either monitors or blocks it, depending on the channel. The protector supports analysis of SMTP, HTTP, FTP, plain text, IM traffic (e.g., Yahoo, MSN, and file transfer). It can monitor or block email traffic, but only monitor web traffic. Blocking web traffic requires integration with a third-party proxy that supports ICAP.

The protector fits into your existing network with minimum configuration and necessitates no network infrastructure changes.

If you want to monitor SMTP traffic, the protector is your best choice. You configure a span port to be connected to the protector. This span contains your SMTP traffic.

If you want email blocking capabilities, you can use the protector’s explicit MTA mode or TRITON AP-EMAIL.

We do not recommend that you use both options for the same traffic, although some companies prefer monitoring one point and enforcing policies on another, due to differences in network traffic content and load.

If you want to monitor HTTP traffic, you can use the protector to do so, or you can integrate TRITON AP-DATA with TRITON AP-WEB or another Web proxy.
If you want to monitor FTP, plain text, or IM traffic, you should use the protector. Note that the protector cannot block traffic on these channels. You can block FTP using TRITON AP-WEB (as a DLP agent) or other Web proxy that buffers FTP and supports ICAP.

**Deploying the protector**

Most data loss detection devices can be connected off the network, enabling them to sniff network traffic and monitor breaches. This monitoring method is useful because it does not interfere with traffic; however, it also does not enable the loss-prevention system to prevent (block) data losses—only to note and report them.

The following table depicts the available modes for each channel:

<table>
<thead>
<tr>
<th>Topology Service</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTTP</td>
<td>Monitoring</td>
</tr>
<tr>
<td>SMTP</td>
<td>Monitoring passive</td>
</tr>
<tr>
<td></td>
<td>Mail Transfer Agent (MTA)</td>
</tr>
<tr>
<td>All Others</td>
<td>Monitoring</td>
</tr>
<tr>
<td>ICAP</td>
<td>Monitoring</td>
</tr>
<tr>
<td></td>
<td>Blocking</td>
</tr>
</tbody>
</table>

The protector is connected off the network via the SPAN/mirror port of a switch, which enables the protector to sniff traffic and receive a copy for monitoring purposes, or via a SPAN/mirror device. Traffic is monitored and analyzed, but cannot be blocked. Note that the protector can also be connected to a TAP device.

The following diagram depicts the Websense device connected to the network via a mirror port on a switch, transparently monitoring network traffic.

* Connect the protector to the mirror port of a switch on your network’s path.
- Connect the protector to the TRITON AP-DATA server.

## Hardware requirements

The protector is a soft appliance. If you are using your own hardware, it must meet the following hardware requirements:

<table>
<thead>
<tr>
<th>Protector</th>
<th>Minimum requirements</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>2 Dual-core Intel Xeon processors (2.0 GHz) or AMD equivalent</td>
<td>2 Quad-core Intel Xeon processors (2.0 GHz) or AMD equivalent</td>
</tr>
<tr>
<td>Memory</td>
<td>2 GB</td>
<td>4 GB</td>
</tr>
<tr>
<td>Hard drives</td>
<td>2 - 72 GB</td>
<td>4 - 146 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>70 GB</td>
<td>292 GB</td>
</tr>
<tr>
<td>Hardware RAID</td>
<td>1</td>
<td>1 + 0</td>
</tr>
<tr>
<td>NICs</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
Port requirements

The following ports must be kept open for the protector:

**Outbound**

<table>
<thead>
<tr>
<th>To</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON AP-DATA Server</td>
<td>17500-17515*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>TRITON management server</td>
<td>80</td>
<td>Fingerprint sync</td>
</tr>
<tr>
<td>TRITON management server</td>
<td>17443</td>
<td>Syslog, forensics, incidents, mobile status</td>
</tr>
<tr>
<td>Next hop MTA</td>
<td>25**</td>
<td>SMTP</td>
</tr>
<tr>
<td>TRITON AP-WEB</td>
<td>56992</td>
<td>Linking Service</td>
</tr>
<tr>
<td>Other</td>
<td>UDP 123</td>
<td>Inbound/outbound NTPD (available on the appliance yet disabled by default)</td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.
** Explicit MTA

**Inbound**

<table>
<thead>
<tr>
<th>From</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management server</td>
<td>17500-17515*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>Anywhere (including the Data Security manager)</td>
<td>22</td>
<td>SSH access</td>
</tr>
<tr>
<td>TRITON AP-DATA Server</td>
<td>17500-17515*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>Explicit MTA</td>
<td>25**</td>
<td>SMTP</td>
</tr>
<tr>
<td>Explicit MTA</td>
<td>10025*</td>
<td>SMTP, mail analysis</td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.
** Explicit MTA

If you are connecting third-party software such as a Web proxy through ICAP, the ICAP client should keep the following ports open:

**Outbound**

<table>
<thead>
<tr>
<th>To</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protector</td>
<td>1344</td>
<td>Receiving ICAP traffic</td>
</tr>
</tbody>
</table>
Installing the protector software

Installing the TRITON AP-DATA protector comprises 3 basic steps:

1. Configuring the network, page 44
2. Installation steps, page 44

Protector installations include:

- A policy engine
- ICAP client - for integration with third-party solutions that support ICAP, such as some Web proxies.
- Secondary fingerprint repository (the primary is on the TRITON management server)

Configuring the network

The following preparatory steps must be taken for the protector to be integrated into your network.

Make sure that firewalls or other access control devices on your network do not block ports used by the protector to communicate with the TRITON AP-DATA server (see Protector, page 40).

When installing the protector device in the network, both incoming and outgoing traffic (in the monitored segment) must be visible.

In some cases, incoming traffic from the Internet and outgoing traffic to the Internet are on separate links. In this case, the mirror port must be configured to send traffic from both links to the protector. The protector needs to have access to the TRITON management server and vice versa.

Installation steps

You access the installation wizard for your protector through a command line interpreter (CLI).

To install the protector, do the following:

1. If you have purchased a Websense TRITON AP-DATA Appliance, follow the instructions on its quick start poster to rack, cable, and power on the appliance. Note that at least one of the P1, P2, and N interfaces must be configured for monitor mode, although it doesn’t matter which one.

If you are using your own hardware:
a. Use either a direct terminal or connect via serial port to access the command line. For serial port connection, configure your terminal application, such as HyperTerminal or TeraTerm, as follows:
   • 19200 baud
   • 8 data bits
   • no parity
   • 1 stop bit
   • no flow control

b. The protector software is provided on an ISO image. Download the image, WebsenseDataProtectorMobile81x.iso, from MyWebsense and burn it to a CD.

c. Place the CD in the protector’s CD drive and restart the machine.

d. An installer page appears. If you are using a regular keyboard and screen, type kvm and press Enter. If you are using a serial console, press Enter. The machine is automatically restarted.

2. You’re prompted to enter a user name and password. Enter admin for both.

   When the protector CLI opens for the first time, logging in as admin automatically opens the installation wizard. On subsequent attempts, type “wizard” at the command prompt to access the wizard.

3. You have the option to install the Websense protector software or mobile agent software. Type P for Protector.

4. Follow the instructions given by the wizard to configure basic settings.

   When the wizard requires data entry, it prompts you. In some cases, a default setting is provided (shown within brackets [ ]). If the default setting is acceptable, press <Enter> to keep the default value.

**STEP 1: Accept license agreement**

Each time the installation wizard opens, the end-user license agreement appears. Use the page-down/ scroll /space keys to read/scroll to the end of the agreement. Carefully
read the license agreement, and when prompted, type yes to accept the license agreement.

WEBSENSE
SUBSCRIPTION AGREEMENT

THE PRODUCTS ARE PROVIDED ONLY ON THE CONDITION THAT SUBSCRIBER AGREES TO THE TERMS AND CONDITIONS IN THIS SUBSCRIPTION AGREEMENT AND THE MATERIALS REFERENCED IN EXHIBIT "A" ("AGREEMENT") BETWEEN SUBSCRIBER AND WEBSENSE. BY ACCEPTING THIS AGREEMENT OR BY USING THE PRODUCTS, SUBSCRIBER ACKNOWLEDGES IT HAS READ, UNDERSTANDS, AND AGREES TO BE BOUND BY THIS AGREEMENT.

1. Definitions.
"Affiliate" means an entity controlling, controlled by, or under common control with Subscriber, where control is established by a majority ownership (greater than fifty percent (50%)) in or over an entity; provided, however, that the term "Affiliate" shall not include an entity which is a direct competitor of Websense.

"Databases" means proprietary database(s) of URL addresses, email addresses, Malware, applications and other valuable information.

"Database Updates" means changes to the content of the Databases.

"Documentation" means the Product installation instructions, user manuals, setup posters, release notes, and operating instructions prepared by Websense, in any form or medium, as may be updated from time to time by Websense and made generally available to Subscriber.

"Error" means a material failure of the Product to conform to the Documentation, which is reported by Subscriber and replicable by Websense.

---More---[Z] [Press space to continue, 'q' to quit.]

STEP 2: Select the hardware to install and confirm hardware requirements

The system checks to see if your hardware meets the following requirements:

- 2 GB RAM
- 4 CPU
- CPU with more than 2MB of cache
- CPU speed of 8000 bogomips
- Partition "/opt/websense/data" should have at least 45 GB

If your requirements are substandard, you’re asked if you want to continue.
STEP 3: Set administrator password

1. Type in and confirm a new password for the “admin” account. For security reasons, it is best practice to change the default password.

   Step 3/8: Administrator Password
   Choose a new password or passphrase for the "admin" user.
   A valid password should be at least 7 characters in length.
   It should contain at least 2 of the following classes:
   One digit
   One symbol
   One capital letter
   One lowercase letter

   If you begin the password with a capital letter or end it with a digit, these characters do not count as one of the classes.

   Enter a new "admin" password (Press [Enter] to leave it unchanged): _

2. Type in and confirm a new Root (“root”) Password (mandatory). The root account provides full access to the device and should be used carefully.

   Re-enter the password:
   Choose a new password or passphrase for the "root" user.
   A valid password should be at least 7 characters in length.
   It should contain at least 2 of the following classes:
   One digit
   One symbol
   One capital letter
   One lowercase letter

   If you begin the password with a capital letter or end it with a digit, these characters do not count as one of the classes.

   Enter a new "root" password: _

STEP 4: Set the NIC for management server and SSH connections

A list of available network interfaces (NICs) appears. In this step, choose the NIC for use by the TRITON management server, SSH connections, and logging onto the protector (eth0 by default). All other NICs will be used for intercepting traffic.

To help you identify which NIC to use, the wizard can simulate traffic for 0-60 seconds and cause LEDs to blink on that port. This does not work for all hardware and drivers.

1. Enter a number 0-60 to indicate how long (in seconds) you’d like traffic simulated or press Enter to skip this step.
2. When prompted, choose the NIC index number of the management NIC or accept the default interface.

3. Type the IP address of the NIC you’ve chosen. The default is 192.168.1.1.

4. Type the IP prefix of this NIC. This is the subnet mask in abbreviated format (number of bits in the subnet mask). The default is 24 (255.255.255.0).

5. Type a broadcast address for the NIC. The installation wizard will provide a calculated value, which is normally the desired one.

6. Type the IP address of the default gateway to be used to access the network. If the IP address of the TRITON AP-DATA server is not on the same subnet as the protector, a default gateway is required to tell the protector how to communicate with the TRITON AP-DATA server.
STEP 5: Define the host name and domain name

1. Type the host name to be used to identify this protector. The host name should be unique.

   ![Step 5/9: Hostname and Domain](image)

   Enter Hostname [protector-21108]: CM-Protector-Lilach
   Enter new Domain Name (Press [Enter] to skip this stage): _

2. Optionally, type the domain name of the network into which the protector was added. The domain name set here will be used by the TRITON AP-DATA server when defining the protector’s parameters.

STEP 6: Define the domain name server

Optionally, type the IP address of the domain name server (DNS) that will service this protector. A DNS will allow access to other network resources using their names instead of their IP addresses.

   ![Step 6/9: Domain Name Servers (DNS)](image)

   No DNS servers defined
   Enter the IP address of the DNS server to add. (Press [Enter] to skip this stage): 10.8.19.2
   The following DNS server(s) are currently defined:
   10.8.19.2
   Enter the IP address of the DNS server to add. (Press [Enter] to leave current settings or type 'Delete' to delete it.): _

STEP 7: Set the date, time and time zone

1. Type the current time zone (to view a list of all timezones, type list).
2. Type the current date in the following format: dd-mmm-yyyy.
3. Type the current time in the following format: HH:MM:SS. Note that this is a 24-hour clock.

STEP 8: Register with a TRITON AP-DATA Server

In this step, a secure channel will be created connecting the protector to a TRITON AP-DATA Server. This can be the TRITON management server or a supplemental server, depending on your set up.

1. Type the IP address or FQDN of the TRITON AP-DATA Server. Note that this must be the IP address identified when you installed the server machine. It cannot be a secondary IP address.

2. Type the user name and password for a TRITON AP-DATA administrator that has privileges to manage system modules.

Final step: Verification

In the TRITON AP-DATA module of TRITON Manager, verify that the Websense Protector is no longer pending and that the icon displays its active status. Refresh the browser.

Click Deploy.
In the protector command-line interface, the following appears:

The protector is now ready to be configured.

**Configuring the protector**

To begin monitoring the network for sensitive information loss, you must perform some configuration in the Data Security manager user interface.

In the TRITON console, click the Data tab and then navigate to **Settings > Deployment > System Modules** and double-click the installed protector.

- Define the channels that the Websense Protector will monitor.
- Supply additional configuration parameters needed by the TRITON AP-DATA Server to define policies for unauthorized traffic.

When you are done, make sure the protector does not have the status Disabled or Pending. You can view its status by looking at the System Modules page.

For more configuration information, see [Configuring the Protector](#) in the Data Security Manager Help system.

**Web Content Gateway**

A Web Content Gateway module is included with TRITON AP-DATA Gateway. It provides DLP policy enforcement for the web channel, including decryption of SSL traffic, user authentication, and content inspection using the DLP policy engine.
This core AP-DATA component permits the use of custom policies, fingerprinting, and more. It is available as a soft appliance, and does not use the Web module of the TRITON Manager.

Web Content Gateway is also included in TRITON AP-WEB. In addition to SSL decryption, this gateway provides URL filtering/category, content security, web policy enforcement, and more. AP-WEB can be a physical or soft appliance.

This section describes how to install the core AP-DATA Web Content Gateway component. For instructions on setting up AP-WEB, see the TRITON AP-WEB Installation Guide.

Note that Web Content Gateway is inactive until registered with a TRITON management server.

**Preparing your operating system for Content Gateway**

Content Gateway supports Red Hat Linux 6 series, 64-bit, Basic Server and the corresponding CentOS version.

Special steps must be taken to install and configure such versions to work with Content Gateway v8.1.x.

---

**Warning**

Content Gateway is supported on Red Hat Enterprise Linux 6, Basic Server (no GUI) and is **not** supported on RHEL 6 with a GUI.

---

**biosdevname**

Red Hat Enterprise Linux 6, update 1 introduced **biosdevname**, but biosdevname is not supported by Content Gateway Version 8.1.x. It must be disabled.

What is biosdevname? The Red Hat Enterprise Linux update 6.1 release notes state:

... biosdevname [is an] optional convention for naming network interfaces. biosdevname assigns names to network interfaces based on their physical location. ... biosdevname is disabled by default, except for a limited set of Dell systems.

biosdevname is designed to replace the older, inconsistent “eth#” naming scheme. The new standard will be very helpful when it is fully adopted, however it is not yet fully adopted.
The presence of a single Ethernet device absent the SMIBIOS Slot # and biosdevname field causes the Red Hat Enterprise Linux 6.x installer and ‘udev’ to fall back to the preferred eth# device naming for all interfaces.

**Important**

To ensure interface name consistency among hardware platforms and Red Hat Enterprise Linux 6.4 and higher, Content Gateway Version 8.1.x requires “eth#” names. If any non-“eth#” names exist, the Content Gateway installer exits and provides a link to instructions for modifying system startup files.

Upgrading from Red Hat Enterprise Linux 6.0 to 6.4 and higher poses no risk. There was no biosdevname support in Update 6.0 and device names are not altered by the upgrade to 6.4 or higher.

**Disabling biosdevname**

If while installing Content Gateway, the installer finds non-eth# interface names, the installer quits and provides a link to instructions for modifying system startup files.

There are 2 ways to disable biosdevname:

1. During operating system installation.
2. Post-operating system installation through modification of several system files and other activities.

The easiest way to disable biosdevname is to do it during operating system installation. This is the recommend method.
Disabling biosdevname during operating system installation:
When the installer starts, press [TAB] and alter the boot line to add “biosdevname=0” as follows:

![Image of installer interface](image)

Proceed through the rest of the installer as usual.

**Disabling biosdevname after operating system installation:**

Log on to the operating system and verify that non-eth# names are present.

```bash
ifconfig -a
```

If only “eth#” and “lo” names are present, you are done. No other actions are required.
If there are names like “emb#” or “p#p#” perform the following steps.

1. Log in as root.
2. `cd /etc/sysconfig/network-scripts`
3. Rename all “ifcfg-<ifname>” files except “ifcfg-lo” so that they are named “ifcfg-eth#”.
   a. Start by renaming “ifcfg-em1” to “ifcfg-eth0” and continue with the rest of the “ifcfg-em#” files.
   b. When the above are done, rename the “ifcfg-p#p#” files.

If there are multiple “ifcfg-p#p1” interfaces, rename all of them in the order of the lowest “ifcfg-p#” first. For example, if the initial set of interfaces presented by “`ifconfig -a`” is:
em1 em2 em3 em4 p1p1 p1p2 p2p1 p2p2
  em1 -> eth0
  em2 -> eth1
  em3 -> eth2
  em4 -> eth3
  p1p1 -> eth4
  p1p2 -> eth5
Installing TRITON AP-DATA Agents and Servers

1. Make the “ifcfg-eth#” files linear so that if you have 6 interfaces you have eth0 through eth5.

4. Edit all the ifcfg-eth# files.
   a. Update the DEVICE= sections to refer to the new name: “eth#”
   b. Update the NAME= sections to refer to the new name: “System eth#”

5. Remove the old udev device mapping file if it exists:
   rm -f /etc/udev/rules.d/70-persistent-net.rules

6. Modify the “grub.conf” file to disable biosdevname for the kernel you boot.
   a. Edit /boot/grub/grub.conf
   b. Add the following to the end of your “kernel /vmlinuz” line:
      biosdevname=0

7. Reboot.

8. Reconfigure the interfaces as required.

Prepare for installation

1. Make sure that the server you intend to use meets or exceeds the requirements listed in the “Content Gateway” section of “Requirements for web protection solutions” in System requirements for this version.

2. Configure a hostname for the Content Gateway machine and also configure DNS name resolution. Complete these steps on the machine on which you will install Content Gateway.
   a. Configure a hostname for the machine that is 15 characters or less:
      hostname <hostname>
   b. Update the HOSTNAME entry in the /etc/sysconfig/network file to include the new hostname assigned in the previous step:
      HOSTNAME=<hostname>
   c. Specify the IP address to associate with the hostname in the /etc/hosts file. This should be static and not served by DHCP.
      The proxy uses this IP address in features such as transparent authentication and hierarchical caching. This must be the first line in the file. Do not delete the second and third lines (the ones that begin with “127.0.0.1” and “::1”, respectively).
      xxx.xxx.xxx.xxx   <FQDN>   <hostname>
      127.0.0.1 localhost.localdomain localhost
      ::1 localhost6.localdomain6 localhost6
      <FQDN> is the fully-qualified domain name of this machine (for example: myhost.example.com). <hostname> is the same name specified in Step a. Do not reverse the order of the FQDN and hostname.
d. Configure DNS in the `/etc/resolv.conf` file.

```plaintext
search <subdomain1>.<top-level domain> <subdomain2>.<top-level domain> <subdomain3>.<top-level domain>
nameserver xxx.xxx.xxx.xxx
nameserver xxx.xxx.xxx.xxx
```

This example demonstrates that more than one domain can be listed on the search line. Listing several domains may have an impact on performance, because each domain is searched until a match is found. Also, this example shows a primary and secondary nameserver being specified.

e. Gather this information:
   - Default gateway (or other routing information)
   - List of your company’s DNS servers and their IP addresses
   - DNS domains to search, such as internal domain names. Include any legacy domain names that your company might have.
   - List of additional firewall ports to open beyond SSH (22) and the proxy ports (8080-8090).

3. For Websense Content Gateway to operate as a caching proxy, it must have access to at least one raw disk. Otherwise, Content Gateway will function as a proxy only.

To create a raw disk for the proxy cache when all disks have a mounted file system:

---

**Note**

This procedure is necessary only if you want to use a disk already mounted to a file system as a cache disk for Content Gateway. Perform this procedure **before** installing Content Gateway.

---

**Warning**

Do not use an LVM (Logical Volume Manager) volume as a cache disk.

---

**Warning**

The Content Gateway installer will irretrievably clear the contents of cache disks.

---

a. Enter the following command to examine which file systems are mounted on the disk you want to use for the proxy cache:

```bash
df -k
```

b. Open the file `/etc/fstab` and comment out or delete the file system entries for the disk.

c. Save and close the file.
d. Enter the following command for each file system you want to unmount:

```bash
umount <file_system>
```

When the Content Gateway installer prompts you for a cache disk, select the raw disk you created.

---

**Note**

It is possible to add cache disks after Content Gateway is installed. For instructions, see the Content Gateway Manager Help.

---

4. If you plan to deploy multiple, clustered instances of Content Gateway:

- Find the name of the network interface you want to use for cluster communication. This must be a dedicated interface.

- Find or define a multicast group IP address.

  If a multicast group IP address has not already been defined, enter the following at a command line to define the multicast route:

  ```bash
  route add <multicast.group address>/32 dev <interface_name>
  ```

  Here, `<interface_name>` is the name of the interface used for cluster communication. For example:

  ```bash
  route add 224.0.1.37/32 dev eth1
  ```

5. It is recommended that the Content Gateway host machine have Internet connectivity before starting the installation procedure. The software will install without Internet connectivity, but analytic database updates cannot be performed until Internet connectivity is available.

6. Download the `WebsenseCG81xSetup_Lnx.tar.gz` installer tar archive from mywebsense.com to a temporary directory on the machine that will host Content Gateway.

   To unpack the tar archives, use the command:

   ```bash
   tar -xvzf WebsenseCG81xSetup_Lnx.tar.gz
   ```

7. Consider the following security issues prior to installing Content Gateway:

- Physical access to the system can be a security risk. Unauthorized users could gain access to the file system, and under more extreme circumstances, examine traffic passing through Content Gateway. It is strongly recommended that the Content Gateway server be locked in an IT closet and that a BIOS password be enabled.

- Ensure that root permissions are restricted to a select few persons. This important restriction helps preclude unauthorized access to the Websense Content Gateway file system.
Installing TRITON AP-DATA Agents and Servers

- For a list of default ports, see the Web tab of the TRITON Ports spreadsheet. They must be open to support the full set of Web Content Gateway features.

  ![Note]
  
  If you customized any ports that Websense software uses for communication, replace the default port with the custom port you implemented.

- If your server is running the Linux IPTables firewall, you must configure the rules in a way that enables Content Gateway to operate effectively. See IPTables for Content Gateway.

8. Content Gateway can be used as an explicit or transparent proxy. For setup considerations for each option, see the Content Gateway explicit and transparent proxy deployments.

Install Content Gateway

1. Disable any currently running firewall on this machine for the duration of Content Gateway installation. Bring the firewall back up after installation is complete, opening ports used by Content Gateway.

  ![Important]
  
  If SELinux is enabled, set it to permissive or disable it before installing Content Gateway. Do not install or run Content Gateway with SELinux enabled.

2. Make sure you have root permissions:

   `su root`

3. In the directory where you unpacked the tar archive, begin the installation, and respond to the prompts to configure the application.

   `./wcg_install.sh`

   The installer installs Content Gateway in /opt/WCG. It is installed as root.

  ![Note]
  
  Up to the configuration summary, you can quit the installer by pressing Ctrl-C. If you choose to continue the installation past the configuration summary and you want to quit, do not use Ctrl-C. Instead, allow the installation to complete and then uninstall it.

  If you want to change your answer to any of the installer prompts, you will be given a chance to start over at the first prompt once you reach the configuration summary; you do not have to quit the installer.
4. If your server does not meet the minimum hardware requirements or is missing required operating system packages, you will receive error or warning messages. For example:

```
Error: Websense Content Gateway v8.1.x on x86_64 requires several packages that are not present on your system.
Please install the following packages: <list of packages>
If you are connected to a yum repository you can install these packages with the following command:
yum install <list of packages>
See the Websense Technical Library (www.websense.com/library) for information about the software requirements for x86_64 installation.
```

Install the missing packages and again start the Content Gateway installer.

Here is an example of a system resource warning:

```
Warning: Websense Content Gateway requires at least 6 gigabytes of RAM.
Do you wish to continue [y/n]?
```

Enter **n** to end the installation and return to the system prompt.
Enter **y** to continue the installation. If you choose to run Content Gateway after receiving this warning, performance may be affected.

5. Read the subscription agreement. At the prompt, enter **y** to continue installation or **n** to cancel installation.

```
Do you accept the above agreement [y/n]? y
```

6. Enter and confirm a password for the Content Gateway Manager administrator account:

```
Enter the administrator password for the Websense Content Gateway management interface.
Username: admin
Password:> (note: cursor will not move as you type)
Confirm password:> 
```

This account enables you to log on to the management interface for Content Gateway (the Content Gateway manager). The default username is **admin**.
To create a strong password (required), use 8 to 15 characters, with at least 1 each of the following: upper case letter, lower case letter, number, special character.

**Important**
The password cannot contain the following characters:

- space
- $ (dollar symbol)
- : (colon)
- ' (backtick; typically shares a key with tilde, ~)
- \ (backslash)
- “ (double-quote)

**Note**
As you type a password, it may seem that nothing is happening—the cursor will not move nor will masked characters be shown—but the characters are being accepted. After typing a password, press **Enter**. Then repeat to confirm it.

7. Enter an email address where Content Gateway can send alarm messages:

   Websense Content Gateway requires an email address for alarm notification.
   Enter an email address using @ notation: [] >
   Be sure to use @ notation (for example, user@example.com). Do not enter more than 64 characters for this address.

8. When prompted, select ‘2’ to **configure the Content Gateway as a component of TRITON AP-DATA Gateway** (without TRITON AP-WEB).

9. When prompted:

   Enter Data Security Manager Server IP: [] >
   This is the IP address of the TRITON management server. Use dot notation (i.e., xxx.xxx.xxx.xxx). The address must be IPv4.

10. Review default Content Gateway ports:

    Websense Content Gateway uses 8 ports on your server:
    Port Assignments:
---

1. WebSense Content Gateway Proxy Port 8080
2. Web Interface Port 8081
3. Auto config port 8083
4. Process manager port 8084
5. Logging server port 8085
6. Clustering port 8086
7. Reliable service port 8087
8. Multicast port 8088

Enter the port assignment you would like to change:

1-8 - specific port changes
X - no change
H - help

[X] >

Change a port assignment if it will conflict with another application or process on the machine. Otherwise, leave the default assignments in place.

If you do not want to use these ports for Content Gateway, or if the installation program indicates that a port conflict exists, make any necessary changes. Any new port numbers you assign must be between 1025 and 65535, inclusive.

11. For clustering, at least two network interfaces are required. If your machine has only one, the following prompt appears:

Websense Content Gateway requires at least 2 interfaces to support clustering. Only one active network interface is detected on this system.

Press Enter to continue installation and skip to Step 13.

12. If two or more network interfaces are found on this machine, you are asked whether this instance of Content Gateway should be part of a cluster:

Websense Content Gateway Clustering Information

1 - Select '1' to configure Websense Content Gateway for management clustering. The nodes in the cluster will share configuration/management information automatically.

2 - Select '2' to operate this Websense Content Gateway as a single node.

Enter the cluster type for this Websense Content Gateway installation:

[2] >

If you do not want this instance of Content Gateway to be part of a cluster, enter 2.

If you select 1, provide information about the cluster:

Enter the name of this Websense Content Gateway cluster.

> <cluster_name>

Note: All members of a cluster must use the same cluster name.

Enter a network interface for cluster communication.
Available interfaces:
<interface, e.g., eth0>
<interface, e.g., eth1>

Enter the cluster network interface:
>

Enter a multicast group address for cluster <cluster_name>. Address must be between 224.0.1.27 - 224.0.1.254: [default IP address] >

13. For Content Gateway to act as a web cache, a raw disk must be present on this machine. If no raw disk is detected, the following prompt appears:

No disks are detected for cache.
Websense Content Gateway will operate in PROXY_ONLY mode.
Content Gateway will operate as a proxy only and will not cache web pages. Press Enter to continue the installation and skip Step 15.

14. If a raw disk is detected, you can enable the web cache feature of Content Gateway:

Note
If you choose to not enable raw disk cache now, cache disks may be added after Content Gateway has been installed. For instructions, see Content Gateway Manager Help.

Would you like to enable raw disk cache [y/n]? y
a. Select available disks from the list. Selected disks become dedicated cache disks and cannot be used for any other purpose. Cache disks must be raw. Aggregate disk cache size should not exceed 147 GB.
Select available disk resources to use for the cache. Remember that space used for the cache cannot be used for any other purpose.
Here are the available drives
(1) /dev/sdb 146778685440 0x0
Note: The above drive is only an example.

Warning
Although it might be listed as available, do not use an LVM (Logical Volume Manager) volume as a cache disk.

b. Indicate if you want to add or remove disks individually or as a group.
Choose one of the following options:
'A' - Add disk(s) to cache
'R' - Remove disk(s) from cache
'S' - Add all available disks to cache
'U' - Remove all disks from cache
Installing TRITON AP-DATA Agents and Servers

c. Specify which disk or disks to use for the cache.

Enter number to add item, press 'F' when finished:

[F] > 1

Item '1' is selected

[F] >

d. Your selections are confirmed. Note the “x” before the name of the disk.

Here is the current selection

[X] (1) /dev/sdb 146778685440 0x0

e. Continue based on your choice in Step b, pressing X when you have finished configuring cache disks.

Choose one of the following options:

'A' - Add disk(s) to cache
'R' - Remove disk(s) from cache
'S' - Add all available disks to cache
'U' - Remove all disks from cache
'X' - Done with selection, continue Websense Content Gateway installation.

Option: > X

15. A configuration summary appears, showing your answers to the installer prompts (note: summary below is an example):

If you want to make changes, enter n to restart the installation process at the first prompt. To continue and install Content Gateway configured as shown, enter y.

---

**Important**

If you enter y to proceed but you decide you want to cancel the installation, do not attempt to quit the installer by pressing Ctrl-C. Allow the installation to complete. Then uninstall it.
16. Wait for the installation to complete.

17. When installation is complete, reboot the Content Gateway server.

18. When the reboot is complete, check Content Gateway status with:
   
   ```
   /opt/WCG/WCGAdmin status
   ```

   All services should be running. These include Content Cop, Websense Content Gateway, and Content Gateway Manager.

**Installer gives NetworkManager or avahi-daemon error**

When Red Hat Enterprise Linux 6 is installed with a GUI, the Content Gateway installer recognizes systems running NetworkManager or avahi-daemon processes and emits an error similar to:

```
Error: The avahi-daemon service is enabled on this system and must be disabled before Websense Content Gateway v8.1.x can be installed.
Please disable the avahi-daemon service with the following commands and restart the Websense Content Gateway installation.

chkconfig --levels 2345 avahi-daemon off
service avahi-daemon stop
```

To continue, the conflicting NetworkManager and avahi-daemon processes must be stopped.

1. To disable the avahi-daemon service:
   
   ```
   chkconfig --levels 2345 avahi-daemon off
   service avahi-daemon stop
   ```

2. To restart the installer:
   
   ```
   ./wcg_install.sh
   ```

**Configuring Web Content Gateway**

After you’ve installed Content Gateway, do the following to configure it.

**Enter subscription key**

Open the Content Gateway Manager, navigate to **Configure > Subscription**, and enter your subscription key. Restart the Content Gateway machine by navigating to **Configure > My Proxy > Basic > Restart**.

Note that Web Content Gateway requires direct Internet access for the license to be activated.

**Register Content Gateway with TRITON AP-DATA**

Content Gateway must be registered with the TRITON management server to operate. Before registering it:
Installing TRITON AP-DATA Agents and Servers

1. Synchronize the date and time on the Content Gateway and TRITON management server machines to within a few minutes.
2. If Content Gateway is deployed as a transparent proxy, ensure that traffic to and from the communication interface (“C” on a V-Series appliance) is not subject to transparent routing. If it is, the registration process will be intercepted by the transparent routing and will not complete properly.
3. Make sure that the IPv4 address of the eth0 NIC on the Content Gateway machine is available (not required if Content Gateway is located on a V-Series appliance). This is the NIC used by the TRITON management server during the registration process.
   After registration, the IP address can move to another network interface.
4. Verify connectivity between Content Gateway and the TRITON management server.

To register Content Gateway, open Content Gateway Manager:

1. On the Configure > My Proxy > Basic > General page, in the Networking section confirm that Web DLP > Integrated on-box is enabled.
2. Restart Content Gateway as prompted.
3. Go to Configure > Security > Web DLP and enter the IP address of the management server.
4. Enter a user name and password for a Data module administrator with Deploy Settings privileges.
5. Click Register.
6. Restart Content Gateway again by navigating to Configure > My Proxy > Basic > Restart.

After Content Gateway has registered with TRITON AP-DATA, in Content Gateway Manager go to Configure > Security > Web DLP and set the following options:

1. Analyze FTP Uploads: Enable this option to send FTP uploads to Web DLP components for analysis and policy enforcement.
2. Analyze Secure Content: Enable this option to send decrypted HTTPS posts to Web DLP components for analysis and policy enforcement. SSL Manager must be enabled on Content Gateway.
3. Click Apply and restart Content Gateway.

Configure the Content Gateway policy engine

When Content Gateway is registered with the TRITON management server, a Content Gateway module appears on the System Modules page of the Data Security manager.

By default, this agent is configured to monitor web traffic, not block it, and for a default violation message to appear when an incident is triggered. If this is acceptable, you do not need to make changes to the Content Gateway configuration. Simply deploy the new settings.

If you want to block web traffic that breaches policy and customize the violation message, do the following:
1. In the Data Security manager, go to the Settings > Deployment > System Modules page.

2. Select the Web Content Gateway module in the tree view (click the module name itself, not the plus sign next to it).
   It will be listed as AP-WEB Server on <FQDN> (<PE_version>), where <FQDN> is the fully-qualified domain name of the Content Gateway machine and <PE_version> is the version of the Content Gateway policy engine.

3. Select the HTTP/HTTPS tab and configure the blocking behavior you want.
   Select Help > Explain This Page for instructions for each option.

4. Select the FTP tab and configure the blocking behavior you want.
   Select Help > Explain This Page for instructions for each option.

5. Click Save to save your changes.

6. Click Deploy to deploy your settings.

---

**Important**
Even if you do not change the default configuration, you must click Deploy to finalize your Content Gateway deployment process.

---

**Set Up Content Gateway**

- Log onto Content Gateway Manager and run a basic test (Getting Started)
- If there are multiple instances of Content Gateway, consider configuring a managed cluster.
- Configure protocols to proxy in addition to HTTP: HTTP (SSL Manager), FTP
- Complete your explicit or transparent proxy deployment
  - Content Gateway explicit and transparent proxy deployments
  - In Content Gateway Manager Help: Explicit proxy, Transparent proxy
- If proxy user authentication will be used, configure user authentication.
- If you enabled content caching during installation, configure content caching.

After the base configuration has been tested, consider these additional activities:

- In explicit proxy deployments, customize the PAC file
- In transparent proxy deployments, use ARM dynamic and static bypass, or use router ACL lists to bypass Content Gateway (see your router documentation).

---

**Email Gateway for Microsoft Office 365**

Email Gateway for Microsoft Office 365 is a virtual appliance that, when deployed in a Microsoft Azure environment, allows outbound email from Exchange Online to be analyzed for data loss or theft. Email containing sensitive data can be permitted, quarantined, or encrypted. Sensitive attachments can also be dropped.
Email Gateway is a hybrid component of TRITON AP-DATA that enables analysis of email in cloud platforms with management performed on-premises. It is part of the network email channel.

Email Gateway analyzes only outbound traffic, regardless of whether you select Inbound or Internal on the destination page of your policy. It does not support OCR analysis.

Please note that you cannot manage both TRITON AP-EMAIL and Email Gateway for Microsoft Office 365 components on the same TRITON management server. However, you can scan local Exchange email or inbound Exchange Online email using the on-premises protector appliance and also use the Email Gateway virtual appliance to scan outbound email from Exchange Online.

Email Gateway for Microsoft Office 365 can be deployed in 2 ways:

1. Relaying through Exchange Online

![Routing DLP scanned email through Exchange Online](image)

2. Between the sender and the Websense cloud service, where malicious content scanning can be performed before the messages reaches the recipient. (Requires a subscription to Websense TRITON AP-EMAIL with the Cloud module.)
Routing traffic through the cloud service removes the risk of your Microsoft Azure account being blocked when outbound email traffic is blacklisted.

![Diagram](image)

**Figure 2** Routing DLP scanned email through a cloud email security service

### Requirements

- A Microsoft Azure account (activated)
- An Azure VM with at least 4 cores and 7 GB of memory (A3 standard)
- A Windows Server 2008 or Windows Server 2012 Standard Edition R2 machine that conforms to the management server requirements listed [here](#)
- A SQL Server database machine for configuration data
- Microsoft Exchange Online

Once the requirements are met, do the following to deploy Email Gateway in the Azure cloud:

1. Configure a Virtual Network and Virtual Private Network (VPN), page 71
2. Upload the TRITON AP-DATA Email Gateway image file to Azure, page 77
3. Create a Email Gateway VM in Azure, page 82
4. Configure the Email Gateway VM, page 89
5. Install TRITON management components for the virtual appliance, page 91
6. Configure the appliance in the TRITON Manager, page 97
7. Configure mail flow in Exchange Online, page 99

For an at-a-glance view of the process, see the [AP-DATA Email Gateway Setup Guide](#).
Configure a Virtual Network and Virtual Private Network (VPN)

2. Click Networks and then New to create a new virtual network.
3. Click **Custom Create**.

4. Enter a name for the virtual network you are creating, choose a location, then click >. Location refers to the physical location (region) where you want your resources (VMs) to reside. Choose the location closest to you. It will be used for all the other components such as the storage space and the VM.
5. Enter the name and IP address of your DNS server if you want to connect one to the VPN, then select **Configure a point-to-site VPN** and click >. Leave DNS servers blank if you do not plan to use one.

For instructions on creating site-to-site VPNs, see this Microsoft article.

6. Configure the VPN client’s IP range. Include a starting IP and address count. It cannot be the IP range that you are using for your on-premises components or you will have a routing issue on your management server and SQL servers. For
example, if your on-premises servers are using 10.x.x.x, use 192.168.x.x or 172.16.x.x as the starting IP for this virtual network. You do not need to create more than one address space. Click > when done.
7. Specify the address range that you want to use for your virtual network. The VM that you create in Azure will be allocated an IP from this VPN’s range. Click **Add Gateway Subnet** to create a subnet for the gateway (required). Click the check mark when done.

For best practice use a 29-bit subnet mask. This ensures that your IP address pool has 6 addresses and helps ensure a speedy recovery in case of disconnection.

---

**Note**

None of the virtual IP addresses should be on same subnet as the local management server IP. Keeping them on separate subnets prevents problems with the automatic VPN connection script that you will be using later in this procedure.
8. Select the network you just created from the resulting list then click **Create Gateway** to create the gateway. This can take 15-30 minutes.

9. Create security certificates to authenticate VPN clients. For instructions, see [this Microsoft article](#). You need to:
   a. Generate a self-signed root certificate
   b. Upload the root certificate file to the Azure Portal
   c. Generate a client certificate
   d. Export and install the client certificate
10. Download the 32- or 64-bit client VPN package to a local machine and install it.

11. Open the VPN client software and click **Connect** to connect the client to the virtual network.

12. Run `ipconfig` on the VPN client’s command line to find the IP address assigned to it.

13. If your TRITON management server will use a remote SQL database, be sure to place the database on this same VPN network. Install the VPN client software on the remote SQL Server machine as well and connect it to the VPN. Note its client IP address as well.

**Status check**

Now you have created your virtual network and connected your VPN clients to the VPN.

---

**Upload the TRITON AP-DATA Email Gateway image file to Azure**


2. Download and unzip the gateway image file, `TRITON-AP-DATA-Email-Gateway-8.1.0.7z`. (It can take more than an hour to download.)

4. Do one of the following to connect to the Azure cloud:
   Option 1: Add an Azure account
   a. Open the Azure PowerShell console.
   b. Type:
      ```powershell
      Add-AzureAccount
      ```
   c. In the sign-in window, type the username and password of your work or school account.
   d. Azure authenticates and saves the credential information, and then closes the window.
   Option 2: Use a certificate
   e. Open the Azure PowerShell console.
   f. Type:
      ```powershell
      Get-AzurePublishSettingsFile
      ```
   g. A browser window opens and prompts you to download a `.publishsettings` file. It contains information and a certificate for your Microsoft Azure subscription.
   h. Save the `.publishsettings` file.
   i. Type:
      ```powershell
      Import-AzurePublishSettingsFile <PathToFile>
      ```
      Where `<PathToFile>` is the full path to the `.publishsettings` file.

5. If you don’t already have one, create a storage account on Azure (such as “https://ownstorage01.blob.core.chinacloudapi.cn/uploadimage01”)
a. In the Azure Portal, click **Storage** in the left navigation pane, and then click **New**.

![Azure Storage](image)

b. Click **Data Services > Storage > Quick Create** and then enter a URL for the storage account. Azure is a cloud service, so all services you create for it are available online. Enter **storage** if you want the URL to be `https://storage.*.core.windows.net`. Choose the location that you used when you created your virtual network.
Click **Create Storage Account** when done.

c. Click the storage URL, then click **Containers** and **Add**.
d. Enter a name for the new storage container and indicate the type of access you want for it. Choose private if you want only authenticated and registered users to have access to it.

![New container dialog box](image)

6. In the PowerShell console, run a command like the following to upload the Email Gateway virtual hard disk (VHD) that you acquired from Websense to the storage location. This can take 1-2 hours.

```
Add-AzureVhd -Destination "https://ownstorage01.blob.core.chinacloudapi.cn/uploadimage01/Websense-Email-Gateway.vhd" -LocalFilePath "C:\VHD\Disk\TRITON-AP-DATA-Email_Gateway-8.1.0.vhd"
```

This command format is like:

```
Add-AzureVhd -Destination "<StorageURL>/<YourImagesFolder>/<AzureVHDName>" -LocalFilePath "<PathToWebsenseVHDFile>"
```

The parameters:
- C:\VHD\Disk\TRITON-AP-DATA-Email-Gateway-8.1.0.vhd - path to the virtual hard disk that you downloaded from websense.com.
- https://ownstorage01.blob.core.chinacloudapi.cn/uploadimage01/ - URL of the storage account that you created on Azure.
- Websense-Email-Gateway.vhd - a name for the virtual hard disk on Azure.

It can take a few hours to upload the file.

**Status check**

You have:

1. Created your virtual network.
2. Connected your VPN clients to the VPN.
3. Created a storage container in Azure.
4. Uploaded the Websense image file to it.
Create a Email Gateway VM in Azure

1. In the Azure Portal, click **Storage > uploadimage01** to see details about the new storage container.

2. Create a virtual machine image from the virtual hard disk you just uploaded:
a. Click **Virtual Machines > Images** and then click **Create**.

![Virtual Machines](image1.png)

b. Enter a name and description for the VM image. For VHD URL, select the URL of the Email Gateway image file (.vhd) you just uploaded. From Operating System Family, select **Linux**. Also select the box, **I have run waagent - deprovision the virtual machine.**

![Create an image from a VHD](image2.png)
c. Click Open.

3. Create a virtual machine from the virtual machine image you just created:
   a. Click Virtual Machines and then click New.
b. Click **Compute > Virtual Machine > From Gallery**.

c. Click **My Images** and then choose an image and click >.
d. Complete the fields as prompted and then click >. For enterprise use, it is best practice to select a minimum size of 4 cores and 7 GB of memory (A3 standard). The A3 setting handles up to 75 email messages per second and uses 4.2 GB memory. For new user name, enter a user who will be able to log onto the VM.

4. Configure the VM networking. Select the DNS name, region, and virtual network subnet that you used when you created the virtual network. Also select a cloud service and, for load balancing, an availability set. Click > when done.

5. Ensure that SSH port 22 is listed for your endpoints. Azure endpoints (distinct from TRITON DLP endpoints) map public IP addresses and ports to the private IP address and port of the VM in the cloud service. The
private port is the port that the service is listening on the local computer. The public port is the port that the service is listening on externally. In some cases this is the same port, which is the case for PowerShell.

Port 22 must be open to configure or log onto the VM.

a. Select Endpoints from the top menu (Dashboard, Monitor, Endpoints, Configure). SSH port 22 should be listed. If it is not, click Add to add it and then click ->.
b. Select **Add a stand-alone endpoint**. (For load balancing multiple VMs, select **Add an endpoint to an existing load-balanced set**. See *Scalability and load balancing*, page 102 for details.)

![Add Endpoint](image)

- **ADD ENDPOINT**
  
  Add an endpoint to a virtual machine
  
  Traffic coming to this endpoint will be sent to the virtual machine.
  
  **ADD A STAND-ALONE ENDPOINT**
  
  **ADD AN ENDPOINT TO AN EXISTING LOAD-BALANCED SET**
  
  (None)

  ![Specify Endpoint Details](image)

  - **ADD ENDPOINT**
  
  Specify the details of the endpoint
  
  **NAME**
  
  SSH
  
  **PROTOCOL**
  
  TCP
  
  **PUBLIC PORT**
  
  22
  
  **PRIVATE PORT**
  
  22

  ![Create Load-Balanced Set](image)

  - **CREATE A LOAD-BALANCED SET**
  
  You can enable direct server return for Remote Desktop, Windows PowerShell Remoting, or SSH endpoints.

  ![Enable Direct Server Return](image)

  - **ENABLE DIRECT SERVER RETURN**
6. A final screen appears:

7. To view information about the virtual machine you just created, select Virtual Machines, then click your VM name. Make note of the SSH details. You will need them to log onto the VM.

8. Optionally, attach more disks to the virtual machine.
   a. In the virtual machine, select Attach> Attach empty disk.
   b. Attach two disks. The first disk size can be 50 GB and the second disk size can be 100 GB.

<table>
<thead>
<tr>
<th>Status check</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have now:</td>
</tr>
<tr>
<td>1. Created your virtual network.</td>
</tr>
<tr>
<td>2. Connected your VPN clients to the VPN.</td>
</tr>
<tr>
<td>3. Created a storage container in Azure.</td>
</tr>
<tr>
<td>4. Uploaded the Websense image file to it.</td>
</tr>
<tr>
<td>5. Created a VM image from the VHD file.</td>
</tr>
<tr>
<td>6. Created an Azure virtual machine from the VM image.</td>
</tr>
<tr>
<td>7. Created an endpoint on the VM and opened its SSH port.</td>
</tr>
</tbody>
</table>

Configure the Email Gateway VM

1. Log onto the Email Gateway VM as root user.
   a. Log on to the VM as described in Logging onto the virtual machine, page 102.
   b. Add a root user to the VM. (Type “sudo passwd root” and enter a password when prompted.)
c. Type “su -” followed by your root password.

2. If you attached additional disks to the VM in step 14, partition and format the disks.
   a. Use the fdisk tool to create partitions ‘/dev/sdc1’ and ‘/dev/sdd1’ by executing command ‘fdisk /dev/sdc’ and ‘fdisk /dev/sdd’.
   b. Format the two disks using command ‘mkfs.ext4 -i 4096 /dev/sdc1’ and ‘mkfs.ext4 -i 4096 /dev/sdd1’.
   c. Modify the /etc/fstab file by adding the following two lines at the end of the file:
      
      ```
      /dev/sdc1  /var/log       ext4  defaults  1 2
      /dev/sdd1  /var/spool/postfix ext4  defaults  1 3
      ```

3. Start the email protection service on the VM.
   a. Launch the Email Gateway wizard `email_va_config.py` from the VM’s root folder.
   b. Accept the subscription agreement.
   c. Select the option **Stop/Start Email Protection Service** and click **Configure**.
   d. Click **Start** to start the service.

4. Configure the timezone on your virtual appliance by doing the following.
   a. Enter:
      ```
      rm –rf /etc/localtime
      ```
   b. Locate your timezone under `/usr/share/zoneinfo` and then link it using the `ln` command. For example:
      ```
      ln –s /usr/share/zoneinfo/Asia/Shanghai /etc/localtime
      ```
5. Close SSH port 22 on your endpoints for security purposes. Open SMTP port 25 so you can send email through the VM. This is done from the Azure portal as shown in step 11 above.

**Status check**

You have now:

1. Created your virtual network.
2. Connected your VPN clients to the VPN.
3. Created a storage container in Azure.
4. Uploaded the Websense image file to it.
5. Created a VM image from the VHD file.
6. Created an Azure virtual machine from the VM image.
7. Created an endpoint on the VM and opened its SSH port.
8. Logged onto and configured the VM for email protection.

**Install TRITON management components for the virtual appliance**

1. Follow the instructions for installing TRITON AP-DATA on the management server in Chapter 1 of this guide.

**Note**

If you have already installed TRITON AP-DATA v8.1 or if you are upgrading to v8.1 from an earlier version, run the installer and use the Modify Installation page to install TRITON AP-DATA Email Gateway for Microsoft Office 365. Next to TRITON AP-EMAIL, click Install, and then select **TRITON AP-DATA Email Gateway** on a subsequent screen.
2. After selecting the TRITON AP-DATA component, you are asked whether you want to deploy Email Gateway in a cloud infrastructure service like Azure. Select **Install Email Gateway virtual appliance on-premises management component**.

3. Complete the TRITON AP-DATA installation as described in Chapter 1.
4. The Email Gateway installer launches automatically. Use this installer to install the necessary email components on the manager. On the remaining screens, enter only IP addresses from the Azure network. Don’t enter the IPs of any on-premises components.
5. Click **Next** on the Welcome screen.

6. Enter the IP address and port of the SQL database to use for storing management data. This is the VPN client IP assigned to the remote database when you added it to your Azure VPN network.
   Include the username and password for the database account.
7. Enter a location for the database files or accept the default value.

8. On the Email Appliance page, enter the IP address or host name of the VM you created when deploying the appliance in Azure and then click Next.
9. Specify where to install the software.

![Image of installation folder dialog box]

10. Click Install.

![Image of pre-installation summary dialog box]

11. Connect the TRITON management server to the Azure VPN network by doing the following.
b. Download the connection script file, `p2s_vpn_connect.ps1`, and place it in the `Email Security\p2s_vpn\` directory where your Websense software is installed—by default, `C:\Program Files (x86)\Websense\Email Security\p2s_vpn`—and overwrite the file that is there already.

c. In a command-line editor on the TRITON management server, open the VPN connection script.

d. Edit the following parameters. By default, each parameter is empty.
   - `$vpnName` - virtual network name
   - `$vpnNet` - VPN network IP (server side)
   - `$vpnNetmask` - VPN subnet mask (server side)
   - `$vpnClientIP` - VPN client’s IP address

   Each entry should be on a separate line. Entries should be surrounded in quotation marks.

   Use the following format:
   
   ```
   <parameter> = "<value>"
   ```

   Example:

   ```
   # Please modify the following section as needed for your configuration.
   #============================================================================
   
   # Path for the log file
   #============================================================================
   $LogPath = "C:\p2s_reconnect.log"
   
   # The following configuration is related to the virtual network that you created in Azure.
   
   # Name of virtual network
   #============================================================================
   $vpnName = "myexample001"
   
   # The VPN network IP and subnet mask (server side)
   #============================================================================
   $vpnNet = "192.168.0.0"
   $vpnNetmask = "255.255.255.0"
   
   # The VPN client IP (Windows side IP)
   #============================================================================
   $vpnClientIP = "172.16.0.2"
   ```
The default log path is c:\vpn_reconnect.log. You can edit this as well if desired.

The default user directory path is C:\Users\Administrator\AppData\Roaming\. The administrator named here must be the same as the one who installed the Azure VPN client. Edit Administrator as needed.

Save the file when done.

e. Run the revised script from PowerShell. This connects the management server to the VPN network and keeps them connected at all times.

```
Important
If the management server is restarted for any reason, you must re-run this script. For best practice, add the script to the Windows Task Scheduler so that it runs on startup. For instructions, see this knowledgebase article.
```

f. If your system is using a remote database, copy the script onto the database machine and run it there as well.

```
Status check
You have now:

1. Created your virtual network.
2. Connected your VPN clients to the VPN.
3. Created a storage container in Azure.
4. Uploaded the Websense image file to it.
5. Created a VM image from the VHD file.
6. Created an Azure virtual machine from the VM image.
7. Created an endpoint on the VM and opened its SSH port.
8. Logged onto and configured the VM for email protection.
9. Installed Email Gateway components on the TRITON management server.
10. Connected the TRITON management server and SQL server to the Azure VPN network.
```

Configure the appliance in the TRITON Manager

**Email Gateway manager steps**

Some initial configuration settings are important for TRITON AP-DATA Email Gateway operation. Perform the following activities after you install Email Gateway management components:

1. Log onto the TRITON Manager and select the Email tab.
2. Enter a fully qualified domain name (FQDN) on the **Settings > General > System Settings** page. See [Entering the fully qualified domain name](#) for information.

3. Identify the domains that you want protected and create domain-based routes for your protected domains. See [Protected Domain group](#) for information about protected domains, and [Configuring delivery routes](#) for instructions on domain-based routes.

If you are routing traffic through the Websense cloud email service, enter the SMTP server IP address instead of the recipient domain. This is your customer-specific DNS record for the cloud email service. You can find it by navigating to **Email > Settings > Service IP Addresses** in the Cloud TRITON Manager. Your unique DNS records for inbound and outbound mail are shown under MX Record DNS Entries. Enter the outbound record as your SMTP server IP. For example, cust81-s.out.mailcontrol.com.

The port number to use for the cloud service is 25.

4. Specify an email address to which you want system notification messages sent. This address is typically an administrator address. See [Setting system notification email addresses](#) for details.

5. Register the AP-DATA Email Gateway with the TRITON AP-DATA module. See [Registering with TRITON AP-DATA](#) for more information.

6. Data loss protection policies are enabled by default so no action is needed in this regard. To manage DLP policies, navigate to **Main > Policy Management > DLP Policies > Manage Policies**.

Click **Help** on any of the TRITON Manager pages for help about the page. See the [Email Security Gateway Help](#) for complete information about the Email Module.

**Data Security manager steps**

1. Select the TRITON Manager Data tab.

2. Add the network email destination to policies that should be used for this appliance.

3. Click **Deploy**. No other configuration steps are required.

An Email Gateway module is shown on the System Modules page, as well as System Health and System Logs.

If you want to edit the display name or description for the appliance, you can do so on the System Modules page. If desired, you can balance the load on the gateway by selecting **System Modules > Load Balancing** and then editing the Email Gateway.
Refer to the Data Security Manager Help for more information.

### Status check

You have now:

1. Created your virtual network.
2. Connected your VPN clients to the VPN.
3. Created a storage container in Azure.
4. Uploaded the Websense image file to it.
5. Created a VM image from the VHD file.
6. Created an Azure virtual machine from the VM image.
7. Created an endpoint on the VM and opened its SSH port.
8. Logged onto and configured the VM for email protection.
9. Installed Email Gateway components on the TRITON management server.
10. Connected the TRITON management server and SQL server to the Azure VPN network.
11. Configured the gateway in TRITON Manager.

### Configure mail flow in Exchange Online

Now you must configure Exchange Online to transfer email to the virtual appliance in Azure.

2. Select Mail Flow from the left navigation panel.
3. Create a connector.
   a. Click Connectors on the top, and then click the plus sign (+) to add a new connector.
   b. In the From field, select Office 365, and in the To field, select Your organization’s email server.
   c. Click Next.
   d. Enter a name and description for the connector. (This a new name being assigned to the Email Gateway appliance.)
   e. Click Next.
   f. For When do you want to use this connector, select Only when I have a transport rule set up that redirects messages to this connector.
   g. Click Next.
h. Click the plus sign (+) on the **How do you want to route email messages** page, and enter the IP address or FQDN for the TRITON AP-DATA Email Gateway virtual machine in Azure. If you are using a load balancer in Azure in front of the gateways, enter the FQDN of the virtual IP.

i. Click **Next**.

j. Select **Always use TLS to secure the connection**.

k. Click **Next** to view a summary screen, then click **Next** again.

l. Click + to validate the connector, and then enter a test email address. The system validates the new connector and sends a test email.

m. Save the connection.

4. Create rules that forward traffic to the gateway.

   a. Select **Rules** on the top of the page and then click + to create a new rule.

   b. Assign a name to the rule.

   c. For **Apply this rule if**, select **Apply to all messages**.

   d. Under **Do the following**, indicate the action to take when the condition is met—in this case, **Use the following connector**. Select the connector you just created.

   e. Under **Except if**, select **Sender’s IP address is in range** and enter the IP address for the TRITON AP-DATA Email Gateway virtual machine in Azure. If you are using a load balancer in Azure in front of the gateways, enter the virtual IP.
f. Select **Stop processing more rules** and accept the remaining defaults.

g. Save the rule.

5. Create a second connector.
   a. Click **Connectors** on the top, and then click the plus sign (+) to add a new connector.
   b. This time, in the From field, select **Your organization’s email server** and in the To field, select **Office 365**.
   c. Click **Next**.
   d. Enter a name and description for the connector.
   e. Click **Next**.
   f. On the **How should Office 365 identify email from your email server** page, select 1 of 2 options:
      ○ For best practice, select **By verifying that the subject name on the certificate** and enter the CN of a signed certificate purchased through a vendor like Godaddy or Digicert.
      ○ Alternately, select **By verifying that the IP address of the sending server**, and enter the FQDN of the TRITON AP-DATA Email Gateway virtual machine.
   g. Click **Next** to view a summary screen.
   h. Save the connection.

6. Make sure none of the public static IPs used by the TRITON AP-DATA Email Gateway VMs is listed in SpamHaus and thus blocked by Office 365, likely in the Policy Block List (PBL).
   a. Go to [http://www.spamhaus.org/lookup.lasso](http://www.spamhaus.org/lookup.lasso) and enter each IP.
   b. If any is listed, follow the instructions to remove it.
Installing TRITON AP-DATA Agents and Servers

For more information, read https://www.spamhaus.org/faq/section/Spamhaus%20PBL.

<table>
<thead>
<tr>
<th>Status check</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are ready to go. You have:</td>
</tr>
<tr>
<td>1. Created your virtual network.</td>
</tr>
<tr>
<td>2. Connected your VPN clients to the VPN.</td>
</tr>
<tr>
<td>3. Created a storage container in Azure.</td>
</tr>
<tr>
<td>4. Uploaded the Websense image file to it.</td>
</tr>
<tr>
<td>5. Created a VM image from the VHD file.</td>
</tr>
<tr>
<td>6. Created an Azure virtual machine from the VM image.</td>
</tr>
<tr>
<td>7. Created an endpoint on the VM and opened its SSH port.</td>
</tr>
<tr>
<td>8. Logged onto and configured the VM for email protection.</td>
</tr>
<tr>
<td>9. Installed Email Gateway components on the TRITON management server.</td>
</tr>
<tr>
<td>10. Connected the TRITON management server and SQL server to the Azure VPN network.</td>
</tr>
<tr>
<td>11. Configured the gateway in TRITON Manager.</td>
</tr>
<tr>
<td>12. Configured mail flow to the gateway in Exchange Online.</td>
</tr>
</tbody>
</table>

Logging onto the virtual machine

To access the virtual machine on Azure from a local machine, use an SSH client such as PuTTY or OpenSSH.

1. For Windows, launch PuTTY.
2. Enter the hostname or IP address of the Email Gateway VM as well as the port number. You can find these on the Azure management dashboard, Quick Glance section.
3. Select SSH for the connection type.
4. Click Open to open a connection with the VM.
5. Log onto the VM using the account you specified when creating it.
6. If you have trouble logging on, make sure that port 22 is open and that it is not blocked by your IT organization.

Scalability and load balancing

Depending on your traffic volume and number of mailboxes, you may want to have multiple Email Gateway virtual machines running in the Azure cloud.

All VMs should be connected to the same TRITON management server. Because clustering is not supported by Azure, you must configure each VM separately.
To distribute traffic between VMs, use Azure’s Load Balancer as shown below. You cannot distribute the load between policy engines in the Data Security manager at this time.

**Procedure**

1. In the Azure Portal, assign all virtual machines the same cloud service and cloud service DNS name. Note that services support no more than 50 VMs at a time.

2. Click **Virtual Machines** in the left pane, select one of the virtual machines that will be in the load-balanced set and click **Endpoints** to configure load balancing. Delete port 25 if it is listed for the endpoint (leave other ports in tact), then select **Create a load-balanced set**.
3. On the Configure the load-balanced set page, type a name for the load-balanced set and then assign the values for probe behavior of the Azure Load Balancer. The Load Balancer uses probes to determine if the virtual machines in the load-balanced set are available to receive incoming traffic.

4. Click the check mark to create the load-balanced endpoint. You will see Yes in the Load-balanced set name column of the Endpoints page for the virtual machine.

5. For other virtual machines, select Add an endpoint to an existing load-balanced set, and then select the set you created earlier.

6. Connect the VMs to the TRITON management server. (You’ve already connected the primary VM to the TRITON management server using the VPN connection script.)
   a. In the TRITON Manager, select the Email tab.
   b. Select Settings > General > Email Appliances. Your primary VM is listed.
   c. Click Add and enter the private IP of the second Email Gateway VM.
   d. On the top right corner, select the second VM from the Appliance field and configure it exactly like the first one.
   e. Select Settings > Data Loss Protection and configure the VM as needed.
   f. Register the second VM to the TRITON AP-DATA module like you registered the first.
   g. Repeat for each VM.
   h. Select the Data tab and click Deploy. You can view all of the VMs in the Data Security manager’s System Modules list.

**Restarting load-balanced VMs**

When a VM is shut down, its IP address is de-allocated. When you restart it, it’s assigned the first address available in the VPN’s IP range.

If there is only one Email Gateway VM on the Azure network, it is allocated the same IP, because there are no other VMs.
But when you have 2 or more VMs running in Azure, you have to restart them in the correct order in order for them to receive the same IPs.

If you don’t, the TRITON manager will not be able to connect to the VMs, deploy new rules to them, or get statistics, etc.

To prevent this issue, it is best practice to configure static IPs for load-balanced VMs. You can assign the IP at the time the VM is created, or you can update an existing VM. You can use PowerShell to assign the IP.

Static IPs should be selected the pool of IP addresses available in your virtual network.

For more information, refer to the MSDN site, Static IP, Reserved IP and Instance Level IP in Azure.

Mobile agent

In this topic:

- Deploying the mobile agent, page 105
- Hardware requirements, page 107
- Installing the mobile agent software, page 108
- Configuring the mobile agent, page 118
- Configuring a mobile DLP policy, page 120

The mobile agent is a Linux-based appliance that lets you secure the type of email content that is synchronized to users’ mobile devices when they connect to the network. This includes content in email messages, calendar events, and tasks.

The mobile agent analyzes content when users synchronize their mobile devices to your organization’s Exchange server. If content or data being pushed to their device breaches the organization’s mobile DLP policy, it is quarantined or permitted accordingly.

The mobile agent is included with TRITON AP-EMAIL, TRITON AP-ENDPOINT, and TRITON AP-DATA Gateway.

Deploying the mobile agent

In your network, the appliance connects to the TRITON management server and to your Microsoft Exchange server to provide this function. DLP analysis is done on the appliance or on other TRITON AP-DATA servers (rather than on the management server) to optimize performance and balance the load.

Outside your DMZ, the mobile agent connects to any Microsoft ActiveSync-compatible mobile device over 3G and wireless networks, such as i-pads, Android
mobile phones, and i-phones. (ActiveSync is a wireless communication protocol used to push resources, such as email, from applications to mobile devices.)

Unlike the protector, the mobile agent appliance acts as a reverse proxy, because it retrieves resources, such as email, from the Exchange server on behalf of the mobile device.

The following diagram illustrates the system architecture of a typical mobile agent deployment. Depending on your network and security requirements, you can also go through an edge device that acts as a reverse proxy to the mobile agent.

For system requirements, see *Hardware requirements*, page 107.

For the default port numbers used by the mobile agent, see *Hardware requirements*, page 107. If you have a security policy in place, exclude these ports from that policy.
so the mobile agent can operate properly. You can lock down or harden your security systems once these ports are open.

Deploying the TRITON AP-DATA mobile agent comprises the following basic steps:

1. *Installing the mobile agent software*, page 108
2. *Configuring the mobile agent*, page 118
3. *Configuring a mobile DLP policy*, page 120

Mobile agent installations include:
- A policy engine
- Secondary fingerprint repository (the primary is on the management server)

## Hardware requirements

The mobile agent is a soft appliance. If you are using your own hardware, it must meet the following hardware requirements:

<table>
<thead>
<tr>
<th>Mobile Agent</th>
<th>Minimum requirements</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>4 core processors (for example, Single quad or two dual core processors), 2.0 GHz Intel Xeon or AMD equivalents</td>
<td>4 core processors (for example, Single quad or two dual core processors), 2.0 GHz Intel Xeon or AMD equivalents</td>
</tr>
<tr>
<td>Memory</td>
<td>8 GB</td>
<td>8 GB</td>
</tr>
<tr>
<td>Hard drives</td>
<td>2 - 72 GB</td>
<td>4 - 146 GB</td>
</tr>
<tr>
<td>Disk space</td>
<td>70 GB</td>
<td>292 GB</td>
</tr>
<tr>
<td>Hardware RAID</td>
<td>1</td>
<td>1 + 0</td>
</tr>
<tr>
<td>NICs</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

## Port requirements

The following ports must be kept open for the mobile agent:

### Outbound

<table>
<thead>
<tr>
<th>To</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management server</td>
<td>17443</td>
<td>Syslog, forensics, incidents, mobile status</td>
</tr>
<tr>
<td>TRITON management server</td>
<td>80</td>
<td>Fingerprint sync</td>
</tr>
<tr>
<td>TRITON management server Server</td>
<td>17500-17515*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>Microsoft Exchange Server</td>
<td>80/443</td>
<td>ActiveSync (user defined using the Data Security manager)</td>
</tr>
</tbody>
</table>
Installing TRITON AP-DATA Agents and Servers

Installing the mobile agent software

The mobile agent must be installed on hardware that meets the requirements described in *Hardware requirements, page 107*. Websense appliances meet these requirements, or you can host the agent on your own Linux-based hardware.

<table>
<thead>
<tr>
<th>TRITON AP-WEB</th>
<th>56992</th>
<th>Linking Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>UDP</td>
<td>Inbound/</td>
</tr>
<tr>
<td></td>
<td>123</td>
<td>outbound NTPD</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(available on</td>
</tr>
<tr>
<td></td>
<td></td>
<td>the appliance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>yet disabled by</td>
</tr>
<tr>
<td></td>
<td></td>
<td>default)</td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.

**Inbound**

<table>
<thead>
<tr>
<th>From</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management server</td>
<td>5820</td>
<td>Settings deployment</td>
</tr>
<tr>
<td>Mobile Devices</td>
<td>80/443</td>
<td>ActiveSync (user defined using the Data Security manager)</td>
</tr>
<tr>
<td>TRITON management server</td>
<td>8892</td>
<td>Management</td>
</tr>
<tr>
<td>TRITON management server</td>
<td>17500-17515*</td>
<td>Consecutive ports that allow communication with Websense agents and machines.</td>
</tr>
<tr>
<td>Anywhere (including the Mobile agent)</td>
<td>22</td>
<td>SSH access</td>
</tr>
<tr>
<td>TRITON AP-DATA Server</td>
<td>5443</td>
<td>Release quarantined messages</td>
</tr>
</tbody>
</table>

* This range is necessary for load balancing.

**Note**

For best performance, make sure that the mobile agent is located in close proximity to the back-end server.

You access the installation wizard for your mobile agent through a putty Command Line Interface (CLI).

To install the mobile agent, do the following:

1. If you have purchased the Websense TRITON AP-DATA Appliance, follow the instructions on its quick start poster to rack, cable, and power on the appliance.

   If you are using your own hardware:

   a. Use either a direct terminal or connect via serial port to access the command line. For serial port connection, configure your terminal application, such as HyperTerminal or TeraTerm, as follows:

      • 19200 baud
      • 8 data bits
      • no parity
• 1 stop bit
• no flow control

b. The mobile agent software is provided on an ISO image. Download the image, WebsenseDataProtectorMobile81x.iso, from MyWebsense and burn it to a CD.

c. Place the CD in the protector’s CD drive and restart the machine.

d. An installer page appears. If you are using a regular keyboard and screen, type **kvm** and press **Enter**. If you are using a serial console, press **Enter**. The machine is automatically restarted.

2. A welcome screen appears:

![Websense Welcome Screen](image)

3. You’re prompted to enter a user name and password. Enter **root** for user name and **admin** for password.

![Ubuntu Login Screen](image)
5. You have the option to install the Websense protector software or mobile agent software. Type M for Mobile agent.

6. Follow the instructions given by the wizard to configure basic settings. When the wizard requires data entry, it prompts you. In some cases, a default setting is provided:

- Capital letter: Shows the default value, such as Yes/no for a yes/No prompt.
- Square brackets ([ ]): Shows the current value and is usually followed by text, such as: Press [Enter] to leave as is.

If the default setting is acceptable, press <Enter> to keep the default value.

**STEP 1: Accept license agreement**

Each time the installation wizard opens, the end-user license agreement appears. Use the page-down/scroll/space keys to read/scroll to the end of the agreement.

Carefully read the license agreement and when prompted, type yes to accept the license agreement.
STEP 2: Set administrator password

Type in and confirm a new password for the “admin” account. For security reasons, it is best practice to change the default password.

![Step 2/8: Administrator Password]

**Important**

A valid password should be at least 7 characters in length. It should contain at least 2 of the following classes:

- One digit
- One symbol
- One capital letter
- One lowercase letter

If you begin the password with a capital letter or end it with a digit, these characters do not count as one of these classes.

The Operating System (OS) prompts you to change (refresh) your password every 90 days.
**STEP 3: Set root password**

Type in and confirm a new password for the root user. The root account provides full access to the device and should be used carefully.

![Root Password Step](image)

---

**Important**

A valid password should be at least 7 characters in length. It should contain at least 2 of the following classes:

- One digit
- One symbol
- One capital letter
- One lowercase letter

If you begin the password with a capital letter or end it with a digit, these characters do not count as one of these classes.

---

**STEP 4: Network configuration**

1. Select the network interface (NIC) from the list of available NICs (eth0 by default), or for advanced configuration, type c.

![Network Configuration Step](image)
2. To configure your NIC, choose the NIC index number from the list of NICs that display on the wizard.

```
Step 4:0: Network Configuration
~~~~~~~~~~~~~ Network interfaces configuration ~~~~~~~~~~~~~
Available network interfaces:
(0) eth0 : 192.168.1.1/255.255.255.0
(1) eth1 : Not configured
(2) eth2 : Not configured
(8-2) - Enter the index of the entry above to modify it or delete it
[Enter] - Finish setting up the network interfaces and continue to the routing setup:
```

3. To configure the NIC that you selected, do one of the following:
   a. Type e to configure the NIC that you selected. You are prompted to define details for the NIC, such as IP address, network address, and gateway (only for the first NIC that you define). You do not need to specify the gateway for subsequent NICs that you want to define.
   b. Type a to change the current NIC alias address setup.
   c. Type b for LEDs to blink on that port.
   d. Type Enter to exit and continue setting other NICs, if required.

```
Configuring Network interface eth0:...
Device: Advanced Micro Devices (AMD) 79c970 (Pcmcia0 LANCE)
eth0: 192.168.1.1/255.255.255.0
(c) - Edit or delete current eth0 setup
(a) - Change current eth0 aliases setup
(b) - Blink eth0 associated LED for easy identification
[Enter] Exit eth0 configuration
```

4. To define the properties for the NIC:
   a. Type the IP address.
   b. Type the network prefix. This is the subnet mask in abbreviated format (number of bits in the subnet mask). The default is 255.255.255.0 for eth0.
```
Configuring eth0:
Please enter the eth0 IP address or type (d) to delete current configuration (10.212.16.10):
Please enter the NETMASK (255.255.0.0): 
```
   c. If prompted, type the IP address for the default gateway to be used to access the network. This configuration is only for the first NIC that you configured.
d. After you have configured your NIC, you can redefine it (change the IP address, network prefix, or gateway) or remove it (type e, then d) if necessary.

```
Configuring Network interface eth0...
Device: Intel Corporation, 82546GB Gigabit Ethernet Controller

eth0 : 192.168.1.1/255.255.255.0

(e) - Edit or delete current eth0 setup
(a) - Change current eth0 aliases setup
(b) - Flash eth0 associated LED for easy identification
[Enter] - Exit eth0 configuration
```

**Note**
If you type **Enter**, a list of available NICs display, allowing you to define other NICs.

e. Type a NIC index number to configure another NIC (or reconfigure the same NIC), or type Enter to finish setting up the NICs and continue to the routing setup.

```
Step 4/5: Network Configuration
------------- Network interfaces configuration -------------
Available network interfaces:
(0)  eth0 : 192.168.1.1/255.255.255.0
(1)  eth1 : Not configured
(2)  eth2 : Not configured
(3)  eth3 : Not configured
(4)  eth4 : Not configured
(5)  eth5 : Not configured

(0-5) - Enter the index of the entry above to modify it or delete it
[Enter] - Finish setting up the network interfaces and continue to the routing setup:
```

f. Type one of the following options:
- Enter: Accept the routing configuration.
- Index: Modify or delete a routing entry index.
- a: Add a routing entry.

```
Step 4/5: Network Configuration
------------- Routing table configuration -------------
(0): default 192.168.1.254
(0) - Index of entry above - Modify or delete an entry
(a) - Add a new route entry
[Enter] - Exit routing configuration
```

---

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g. To store these network definitions, type Y.

Note

If the IP address of the TRITON AP-DATA server is not on the same subnet as the one specified for the mobile management NIC, a gateway is required to tell the mobile agent how to communicate with the TRITON AP-DATA server.

Note

After you finish routing the configuration, you are prompted to store the network configuration.

- If you type n, the network configuration is not saved, and you are prompted to configure the network again.
- If you type y, the details for the network configuration are saved and the network service is reloaded with the new parameters. The new parameters, such as IP address, network prefix, and gateway for the NIC display on the wizard.

5. Type the index number of the Management NIC you have chosen, or type c to define the network parameters. This NIC can be used for other purposes, such as SSH connections, access points for mobile devices, and Exchange communications.
**STEP 5: Define the host name**

1. Type the Fully Qualified Domain Name (FQDN) for the mobile appliance.

2. Type the name to use for the default security certificate in the Subject field. This can be used to secure the connections between mobile devices and the mobile agent using the default certificate. The default certificate is a self-signed certificate automatically generated by Websense.

**STEP 6: Define the domain name server**

Optionally, in the wizard, type the IP address of the Domain Name Server (DNS) that will service this mobile agent. A DNS will allow access to other network resources using their names instead of their IP addresses.

**Important**

Type the IP address of the DNS server if you identify the back-end Exchange server by its host name (using the TRITON AP-DATA GUI) instead of by its IP address.

**STEP 7: Set the date, time, and time zone**

1. Type the current time zone (to view a list of all time zones, type `list`).
2. Type the current date in the following format: `dd-mm-yyyy`. 
3. Type the current time in the following format: HH:MM:SS. Note that this is a 24-hour clock.

![Step 7/8: Date and Time](image)

**STEP 8: Register with a TRITON AP-DATA Server**

In this step, a secure channel will be created connecting the mobile agent to a TRITON AP-DATA Server. This can be the TRITON management server or a supplemental server, depending on your set up.

1. Type the IP address or FQDN of the TRITON AP-DATA Server. Note that this must be the IP address identified when you installed the server machine. It cannot be a secondary IP address.

![Step 8/8: Register with a TRITON AP-DATA Server](image)

2. Type the user name and password for a TRITON AP-DATA administrator that has privileges to manage system modules.

3. Type Enter to exit the wizard. A message displays stating that the configuration was successful.

![The configuration wizard has completed successfully.](image)
Step 9: Reboot the mobile agent appliance

For best practice, reboot the mobile agent appliance. You can reboot later if desired. This completes the IPv6 disabling process that the wizard starts.

Final step: Verification

In the TRITON AP-DATA module of TRITON Manager, verify that the Websense mobile agent is no longer pending and that the icon displays its active status. Refresh the browser.

Click Deploy.

The mobile agent is now ready to be configured. See Configuring the mobile agent, page 118 for instructions.

---

Note

If you reboot, make sure that the mobile agent appliance is on before you configure the mobile agent.

---

Configuring the mobile agent

1. Log on to the Data Security manager.
2. Navigate to Settings > Deployment > System Modules.
3. Verify that the mobile agent is available on the System Modules page.
5. Click the Connection tab, then define the connections: Exchange and Mobile Devices. For more information, see the Data Security Manager Help.
   a. For Exchange Connection, supply the domain and name or IP address of the Exchange server. Ensure a port number is specified.
      • If you select the Use secure connection (SSL) check box, the port number defaults to 443.
      • If you do not select the Use secure connection (SSL) check box, the port number defaults to 80.

---

Important

If the Exchange server is specified by name, make sure local resolving is properly configured to resolve this name. In addition, if an edge-like device is used, ensure there are no loops through the device.
b. For Mobile Devices Connection, supply the following information: IP address of the mobile agent and port number. To use all IP addresses, select All IP addresses from the IP address drop-down list.

![Note]
The IP address of the mobile agent was defined during the installation of the mobile device, when configuring the network settings.

6. Optionally, if you secure connections between mobile devices and the mobile agent, you can use one of 2 certificate options:
   - Self-signed certificate (default option)
     - A self-signed certificate is signed by Websense.
   - Custom certificate
     - A custom certificate is officially signed by a Certificate Authority (CA).
     a. Click Browse to locate and upload your public certificate.
     b. Click Browse to locate and upload your private key.
     c. Optionally, select the Add chained certificate check box, and click Browse to locate and upload your chained certificate.

   For more information, see the Data Security Manager Help.

7. Click the Analysis tab and then select a mode: Blocking or Monitoring. Click the Analysis tab, then configure the Mode.

![Note]
When you select Blocking mode, it is best practice to:

   - Select the Allow on fail option (the default option is Block on fail). Selecting Allow on fail enables failed messages to be received on the mobile device. If you do not select Allow on fail, these messages will be dropped and are not tracked nor released.
   - Define the sender’s email address, outgoing mail server, and port to Notify Users of Breach. To do so, navigate to Settings > General > Alerts > Email Properties.

   For more information, see the Data Security Manager Help.

8. Navigate to Main > Policy Management > Resources > Notifications and select the mobile policy violation template. Add sender details, then use the Outgoing mail server field to define a next hop relay for outbound mail. If you do not, the mobile agent may not send block notifications.

9. Click Deploy.
Wait for the agent to fully deploy. This may take a few minutes.

**Tip**
You can also configure the mobile agent for high-availability. High-availability enables mobile devices to run seamlessly and continuously in the event of a system outage (such as hardware or software failure).

For more information about configuring the mobile agent for high-availability, refer to the document Mobile DLP agent using cluster solutions.

## Configuring a mobile DLP policy

To begin analysis, configure the mobile DLP policy or create a custom policy. To configure the mobile DLP policy, navigate to Main > Policy Management > DLP Policies > Mobile DLP Policy. See the Data Security Manager Help for more configuration information.

To create a custom policy, navigate to Main > Policy Management > DLP Policies > Add Custom Policy. Select Mobile Email on the Destination tab for each rule to support Mobile events.

## FCI agent

In this topic:
- Operating system requirements, page 121
- Port requirements, page 121
- Installing the FCI agent, page 123

The TRITON AP-DATA FCI agent augments the data classification performed using Microsoft File Classification Infrastructure (FCI) on Windows Server 2012 machines.

Working in tandem with the Microsoft File Server Resource Manager (FSRM), the agent analyzes data and applies data discovery policies to it, tagging the data when a match is detected. This allows administrators to identify data such as personally identifiable information (PII) or protected health information (PHI) so they can control access to it, perform remediation on it, and more.

**Note**
The system cannot inspect the content of encrypted files. It can, however, identify encrypted files and tag those if configured to do so. FCI tags remain after decryption and encryption.
The FSRM and TRITON AP-DATA systems are in constant communication. Data is passed from the FSRM according to a schedule configured in the FSRM and passed back by TRITON AP-DATA after analysis. You do not schedule a discovery task in the Data Security manager.

Here is the typical data flow:

1. According to the FSRM schedule, the FCI agent delivers the relevant files to a policy engine in the TRITON AP-DATA system. This could be the management server, supplemental server, or other module.
2. The policy engine processes it and returns classification results.
3. The agent checks the results against an FCI rule/policy map and triggers the relevant FCI rules.
4. The FCI system attaches a property and value to the file as appropriate. Any change in FCI properties or FCI rules causes a rescan of the relevant files, as does any change in the data discovery policies or mapping. If there is a file classification failure, the file is rescanned on the next run.
5. The agent contacts the TRITON management server periodically and checks to see if there is new data to retrieve.

Operating system requirements


Port requirements

The following ports must be kept open for the FCI agent:

<table>
<thead>
<tr>
<th>Outbound</th>
<th>To</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Before you begin

If you have not done so already, perform the following steps before you work with the TRITON AP-DATA FCI agent:

1. Install the Microsoft File Server Resource Manager (FSRM) role on a Windows Server 2012 machine.
2. Define file classification properties in the FSRM.
3. Build classification rules that define how to apply these properties to existing files.
   - You can use existing properties and rules with TRITON AP-DATA, or you can create properties and rules for the sole purpose of working with TRITON AP-DATA.
   - If you want the rule to classify data on the fly, select Continuous Classification in the classifier scheduler.
   - If you want the rule to reclassify files when they or classification rules change, select Re-evaluate existing property values. You can overwrite the existing value if desired.
   - If you plan to associate multiple TRITON AP-DATA discovery policies with the rule and you have defined a multi-value classification properties, select the evaluation type Aggregate the values for best results.
4. Configure and enable the TRITON AP-DATA discovery policies of interest.

See your Microsoft documentation for instructions on steps 1-3. See Creating a discovery policy for instructions on step 4.

Example

You are interested in locating and classifying protected credit card information in your network.

In the FSRM, you name a property “PCI” and assign it the values High, Medium, Low, and None to indicate possible severity levels.

You name a rule “PCI_High”, assign it the property PCI, and specify the value High.
You name a rule “PCI_Med” and specify the value Medium.
You name a rule “PCI_Low” and specify the value Low.

In TRITON AP-DATA, you map the rule PCI_High with the predefined discovery policy, PCI DSS.

When the data supplied by the FSRM matches the discovery policy with a certain threshold (say 50 credit card numbers), the system triggers the FCI rule, which assigns the data the property and value prescribed in the rule (in this case PCI and High).

The FSRM system acts on the trigger as configured, such as setting permissions that keep files with sensitive data private or moving business critical files to the fastest servers.

Installing the FCI agent

1. Download the Websense installer, WebsenseTRITONAP-DATAAgents81x- x64.msi, from mywebsense.com.
2. Launch the installer on a Windows Server 2012 machine with the File Server Resource Manager (FSRM) installed.
3. Accept the license agreement.
4. Select Custom.
5. Click the Install link for TRITON AP-DATA.
6. On the Welcome screen, click Next to begin the installation.
7. In the Destination Folder screen, specify the folder into which to install the agent.
   - The default destination is C:\Program Files (x86)\Websense\Data Security (32-bit). If you have a larger drive, it is used instead. Large removable drives may be detected by the system as a local drive and used as the default. Do not install on removable media.

   ! Important
   - The full installation path must use only ASCII characters.
   - Do not use extended ASCII or double-byte characters.

   ✔ Note
   - Regardless of what drive you specify, you must have a minimum of 0.5 GB of free disk space on the C: drive.
   - This is because the system installs components into the Windows “inetpub” folder on C:.

8. On the Select Components screen, select FCI agent and then Entire feature will be installed on local hard drive. If this option is not shown, you do not have FSRM properly installed on the machine. FSRM is required.
9. In the **Server Access** screen, select the IP address to identify this machine to other Websense components.

10. In the **Register with the TRITON AP-DATA Server** screen specify the path and log on credentials for the TRITON AP-DATA server to which this agent will connect. This could be the TRITON management server or a secondary TRITON AP-DATA server.

    FQDN is the fully-qualified domain name of a machine.

11. In the **Installation Confirmation** screen, if all the information entered is correct, click the **Install** button to begin installation.

    Installation may seem to take a long time. Unless a specific error or failure message appears, allow the installer to proceed.

12. Once installation is complete, the **Installation Complete** screen appears to inform you that your installation is complete.

13. Click **Finish**.

**Configuring the FCI agent**

To prepare for file classification:

1. Log onto the Data Security manager.
2. Enable relevant discovery policies.
3. Enable and configure FCI agent in System Modules.

   a. Navigate to **Settings > Deployment > System Modules**, and then click the FCI agent module.

   b. Enable the module and add a description if desired.

4. Map FCI rules to discovery policies.

   a. Select **Main > Policy Management > Discovery Policies**.

   b. Select **Map Microsoft FCI Rules**.

   c. See [Data Security Manager Help](#) for instructions on completing the map.

5. Deploy settings.

    Because classification is controlled in the FSRM, there is no task to schedule in the Data Security manager. You can view breaches in the Discovery Incident report.
Integration agent

The integration agent allows third-party products to send data to TRITON AP-DATA for analysis.

Third parties can package the integration agent inside their own installer using simple, 'industry standard' methods that are completely transparent to end users.

When the third-party product is installed on a users system, it needs to register the integration agent with the TRITON management server. This can be done transparently through the installation process or using a command-line utility.

The integration agent works on Windows Server, 64-bit machines.

The system treats third-party products that use the integration agent as it does any other agent.

It supports all relevant views and capabilities, including:

- Incident Management and Reporting
- Quarantine and Release of emails
- Traffic log view
- Load balancing capabilities

For information on configuring the integration agent, see “Configuring the integration agent” in the Data Security Manager Help system.

Installing the integration agent

Installed components

When you embed the integration agent in your product installer, 3 TRITON AP-DATA components are installed on the end-user machine:

- PEInterface.dll - A DLL that interacts with the TRITON AP-DATA policy engine on the management server.
- ConnectorsAPIClient.exe - Client software that connects the API in the third-party product with TRITON AP-DATA.
- registerAgent.bat (or .vbs) - A script that performs registration with the TRITON management server.
Installation package format

On Windows, the installation package for the integration agent is provided as an MSI file. The MSI installation wizard presents 4 interactive dialogs:

- Installation-dir - installation directory.
- Registered Channels - The DLP channels to use: HTTP, SMTP, Printer, Discovery.
- Local IP Address - which of the static IP addresses currently assigned to the machine should be used for registration.
- TRITON management server details - IP address or host name, user name, password.

Registering the integration agent

Every instance of the integration agent needs to be registered after being installed. (This is a one time operation.) In other words, every time the third-party product is installed on an end-user machine, that instance of the agent needs to be registered.

The registration operation can be done during the installation by the installer, or using a command-line utility provided with the agent.

The command-line utility should receive the following input arguments:

- Protocols - a non-empty list of supported protocols (out of HTTP, SMTP, Printer, Discovery).
- TRITON management server details - IP address or host name, user name, password.
- Local IP Address (optional) - In case this is not supplied, use any of the static addresses of the machine, and print it to the standard output.
- Search IP Address (optional) - used for re-registration after IP change. In case this is not supplied, use the address in the registerAgent.conf file. If that file does not exist, use the given local IP address.

A successful operation registers the machine with the TRITON management server as having the desired protocols and generates certificate files in the same directory that the tool is located. The tool also stores a configuration file (registerAgent.conf) with the IP address used for registration.

On failure, the script returns a meaningful exit code and prints an error message to standard output.

Using the TRITON AP-DATA API

Third parties that subscribe to the integration agent use a C-based API to send data to TRITON AP-DATA for analysis and receive dispositions in return.

The API can be used to configure analysis operations on a transaction-by-transaction basis on the following variables:
Installing TRITON AP-DATA Agents and Servers

- Channel/Protocol - Upon installation the third-party product can declare its ability to intercept various protocols, and assign each transaction to a protocol.
- Blocking/Monitoring mode - each transaction can work in a different mode.
- Timeout - can be different per transaction.

For documentation on the TRITON AP-DATA API, consult with your Websense Sales representative.

The crawler

In this topic:

- Operating system requirements, page 127
- Port requirements, page 127
- Installing the crawler agent, page 128

The crawler is the name of the discovery and fingerprinting agent. It is selected by default when you install the TRITON management server or supplemental TRITON AP-DATA servers.

You can deploy additional crawlers in your network if you desire. When you set up a fingerprint task, you indicate which crawler should perform the scan. Websense recommends that you use the crawler that is located closest to the data you are scanning.

You can view the status of your crawlers in the Data Security manager user interface. Go to Settings > Deployment > System Modules, select the crawler and click Edit.

Operating system requirements

Crawler machines must be running on one of the following operating system environments:

- Windows Server 2008 (64-bit) Standard or Enterprise R2 or R2 SP1
- Windows Server 2012 Standard Edition (64-bit)

Port requirements

The following ports must be kept open for the crawler:

<table>
<thead>
<tr>
<th>Outbound</th>
<th>Port</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRITON management server</td>
<td>443</td>
<td>Secure communication</td>
</tr>
</tbody>
</table>
Installing TRITON AP-DATA Agents and Servers

Installing the crawler agent

1. Download the Websense installer (WebsenseTRITON81xSetup.exe) from mywebsense.com.
2. Launch the installer.
3. Accept the license agreement.
4. Select Custom.
5. Click the Install link for TRITON AP-DATA.
6. On the Welcome screen, click Next to begin the installation.
7. In the Destination Folder screen, specify the folder into which to install the agent.
   The default destination is C:\Program Files or Program Files (x86)\Websense\Data Security. If you have a larger drive, it is used instead. Large removable drives may be detected by the system as a local drive and used as the default. Do not install on removable media.

   ! Important
   The full installation path must use only ASCII characters. Do not use extended ASCII or double-byte characters.

   ✓ Note
   Regardless of what drive you specify, you must have a minimum of 0.5 GB of free disk space on the C: drive.

8. On the Select Components screen, select Crawler agent and then Entire feature will be installed on local hard drive. If this is a stand-alone installation, deselect all other options, including TRITON AP-DATA Server.
9. In the Server Access screen, select the IP address to identify this machine to other Websense components.
   The following message may appear:
TRITON AP-DATA Discovery Agent works with a specific version of WinPcap.
The installation has detected that your WinPcap version is <version>
In order to proceed with this installation, WinPcap version 4.0.0.1040 needs to be installed and will replace yours.
Click Yes to proceed or Click No to preserve your WinPcap version and deselect the Discovery Agent Feature to continue with the installation.

“Discovery Agent” refers to the crawler agent. The particular version of WinPcap mentioned in this message must be in place to install Crawler Agent. Note that after installation of the crawler agent you can install a different version of WinPcap. The crawler agent should continue to work properly.

10. In the Register with the TRITON AP-DATA Server screen specify the path and log on credentials for the TRITON AP-DATA server to which this agent will connect. This could be the TRITON management server or a secondary TRITON AP-DATA server.

FQDN is the fully-qualified domain name of a machine.

11. In the Local Administrator screen, enter a user name and password as instructed on-screen. The server/host name portion of the user name cannot exceed 15 characters.

12. If you installed a Lotus Notes client on this machine so you can perform fingerprinting and discovery on a Lotus Domino server, the Lotus Domino Connections screen appears.

If you plan to perform fingerprinting or discovery on your Domino server, complete the information on this page.

---

**Important**

Before you complete the information on this screen, make sure that you:

- Create at least one user account with administrator privileges for the Domino environment. (Read permissions are not sufficient.)
- Be sure that the Lotus Notes installation is done for “Anyone who uses this computer.”
- Connect to the Lotus Domino server from the Lotus Notes client.

a. On the Lotus Domino Connections page, select the check box labeled Use this machine to scan Lotus Domino servers.
b. In the **User ID** file field, browse to one of the authorized administrator users, then navigate to the user’s **user.id** file.

![Note](image)

**Note**
Select a user that has permission to access all folders and Notes Storage Format (NSF) files of interest, otherwise certain items may not be scanned.

c. In the **Password** field, enter the password for the authorized administrator user.

13. In the **Installation Confirmation** screen, if all the information entered is correct, click the **Install** button to begin installation.

Installation may seem to take a long time. Unless a specific error or failure message appears, allow the installer to proceed.

If the following message appears, click **Yes** to continue the installation:

*TRITON AP-DATA needs port 80 free.*
*In order to proceed with this installation, DSS will free up this port.*
*Click Yes to proceed OR click No to preserve your settings.*

Clicking **No** cancels the installation.

A similar message for port 443 may appear. Click **Yes** to continue or **No** to cancel the installation.

14. Once installation is complete, the **Installation Complete** screen appears to inform you that your installation is complete. Click **Finish**.

15. Once installation is complete, the **Installation Successful** screen appears to inform you that your installation is complete.

For information on configure the crawler, see “Configuring the crawler” in the Data Security Manager Help system.

**Troubleshooting TRITON AP-DATA agent installation**

**In this topic:**

- *Initial registration fails*, page 131
- *Deploy settings fails*, page 131
- *Subscription errors*, page 132
- . page 132

Though the installation and deployment of agents is normally a series of clear-cut steps, occasionally, some problems can arise. Below are how to resolve common problem scenarios.
Installing TRITON AP-DATA Agents and Servers

Initial registration fails

- Make sure you can ping the TRITON AP-DATA agents by IP and by host name from the TRITON Management Server.
  - On Windows, run the following command (in a Command Prompt) to check for block ports:
    ```
    netstat 1 -na | find "SYN"
    ```
    Each line displayed in response to the command is a blocked port. This command is one-way. Run it on both the agent machine and the TRITON Management Server.
- Check logs on the TRITON Management Server (and remote policy engines).
  - `%dss_home%/logs/mgmtd.log`
  - `%dss_home%/tomcat/logs/dlp/dlp-all.log`
- Check logs on the protector. These reside in the /opt/websense/neti/log directory. In particular, check:
  - `/opt/websense/neti/log/registration.log`
- Make sure no duplicate certificates are installed on the agents’ servers; if there are duplications, delete all of them and re-register the agent. Also, make sure the system date/time of the agent machine and the TRITON Management Server are the same. The following certificates are expected:
  - Certificate > My User Account > Trusted Root Certification Authorities > Certificates > ws-ilp-ca
  - Certificates > Computer > Personal Certificates > <servername>(issued by ws-ilp-ca)
  - Certificates > Computer > Trusted Root Certification Authorities > Certificates > ws-ilp-ca
- Make sure the FQDN value of the agent states the full server name for the agent’s server.
  - Protector — if domain name is configured, the FQDN is: protectorname.domain.name
  - Agents and TRITON AP-DATA server — check “My Computer” properties and copy the computer name value from there.

Deploy settings fails

- Make sure you can ping the agents by IP and by host name from the TRITON Management Server.
- Check logs on the TRITON Management Server (and remote policy engines).
  - `%dss_home%/tomcat/logs/dlp/dlp-all.log`
  - `%dss_home%/tomcat/logs/dlp/deployment-trace.log`
- Check the plat.log on the protector.
Subscription errors

- Restart the Websense TRITON - Data Security service on the TRITON Management Server.
- Check `%dss_home%/tomcat/logs/dlp/dlp-all.log`. 
Adding, Modifying, or Removing Components

In this topic:

- Adding or modifying TRITON AP-DATA components, page 31
- Recreating TRITON AP-DATA certificates, page 32
- Repairing TRITON AP-DATA components, page 32
- Changing the TRITON AP-DATA service account, page 33

This chapter contains instructions for adding, modifying, or removing TRITON AP-DATA components.

Adding or modifying TRITON AP-DATA components

1. Start the Websense installer:
   - If you chose to keep installation files after the initial installation, go to Start > All Programs > Websense > Websense TRITON Setup to start the installer without having to re-extract files.
   - Otherwise, double-click the installer executable.
2. In Modify Installation dashboard, click the Modify link for TRITON AP-DATA.
3. From the installation wizard, select Modify.
   This enables you to review the TRITON AP-DATA installation screens, making modifications to settings—with the exception of username—as necessary.

   To add components, select them on the Select Components screen.
   Also, refer to the following sections for the most common TRITON AP-DATA modify procedures:
   - Recreating TRITON AP-DATA certificates, page 32
   - Repairing TRITON AP-DATA components, page 32
   - Changing the TRITON AP-DATA service account, page 33
Recreating TRITON AP-DATA certificates

From the Modify menu, you can also re-certify the server. This is not recommended except in extreme security breaches. When you recreate security certificates, you must re-register all agents and servers (see Re-registering TRITON AP-DATA components, for instructions), and repeat the Reestablish Connection process for each agent and server.

You must also reinstall all endpoints, or they will not be able to communicate with the servers. Uninstall the existing endpoint software, create a new endpoint package using the package-building tool (you cannot use your existing package), and use SMS or a similar mechanism to install the new package on these endpoints. See Installing and Deploying Websense Endpoint Clients for more information on uninstalling endpoints.

In the initial authentication, the TRITON management server trades certificates with the other servers and endpoints in the network.

To re-run the security communication between TRITON AP-DATA components:

1. If you have not done so already, start the Websense installer:
   - If you chose to keep installation files the last time you ran the installer, go to Start > All Programs > Websense > Websense TRITON Setup. This is starts the installer without having to re-extract files.
   - Double-click the installer executable.
2. In Modify Installation dashboard, click the Modify link for TRITON AP-DATA.
3. From the installation wizard, select Modify.
5. Complete the installation wizard as prompted.

Repairing TRITON AP-DATA components

6. If you have not done so already, start the Websense installer:
   - If you chose to keep installation files the last time you ran the installer, go to Start > All Programs > Websense > Websense TRITON Setup. This is starts the installer without having to re-extract files.
   - Double-click the installer executable.
7. In Modify Installation dashboard, click the Modify link for TRITON AP-DATA.
8. From the installation wizard, select Repair.
9. Complete the installation wizard as prompted.

This restores the installation configuration to its last successful state. This can be used to recover from various corruption scenarios, such as binary files getting deleted, registries getting corrupted, etc.
Adding, Modifying, or Removing Components

Changing the TRITON AP-DATA service account

Do not change the TRITON Infrastructure or TRITON AP-DATA service accounts. Doing so can cause the system to behave in unexpected ways. For example, services may not be able to start and encryption keys may not work.

Removing TRITON AP-DATA components

TRITON AP-DATA components must be removed all at once. You cannot select particular components on a machine for removal.

Warning

TRITON AP-EMAIL requires TRITON AP-DATA to be installed. If you are using TRITON AP-EMAIL, do not uninstall TRITON AP-DATA or TRITON AP-EMAIL will quit working.

Do not uninstall the TRITON infrastructure before removing TRITON AP-DATA.

For instructions on removing a TRITON AP-ENDPOINT, see Uninstalling endpoint software.

To remove TRITON AP-DATA components:

1. Start the Websense installer:
   - If you chose to keep installation files after the initial installation, go to Start > All Programs > Websense > Websense TRITON Setup to start the installer without having to re-extract files.
   - Otherwise, double-click the installer executable.
2. In Modify Installation dashboard, click the Modify link for TRITON AP-DATA.
3. At the Welcome screen, click Remove.
4. At the TRITON AP-DATA Uninstall screen, click Uninstall.

   Important
   This removes all TRITON AP-DATA components from this machine.

The Installation screen appears, showing removal progress.

5. At the Uninstallation Complete screen, click Finish.
6. You are returned to the Modify Installation dashboard.