WEBSENSE®
Email Security

Installation Guide

Report Central

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Contents

1 | System Requirements

Report Central works with Websense Email Security to generate reports about your organization's email use. Choose from a wide range of useful, pre-configured graphs and tables, or set up your own custom reports.

System requirements

The Report Central installation consists of two integrated parts: a server piece (Web application) and a client piece (Java applet). Both of these pieces are installed together on the Report Central server machine. Whenever a user accesses the Report Central Web application (from the server itself or from a remote machine), the client applet runs in the browser. On remote machines, this applet is downloaded when the browser accesses Report Central. Depending on the browser settings, the applet can be cached on the remote machine, allowing it to start quicker when run a second time.

The system requirements here are listed for the Report Central server machine and for client machines accessing the Report Central Web application. The browser and file viewer requirements apply to both machines, because both must support the client applet when accessing Report Central.

Server

The following requirements apply to the server machine on which Report Central is installed.

Item	Requirement
Operating System	Windows 2000 Server Service Pack 4
	Windows 2000 Advanced Server Service Pack 4
	Windows Server 2003 Standard Edition Service Pack 2
	Windows Server 2003 Enterprise Edition Service Pack 2
	Windows Server 2008 Enterprise Edition Service Pack 2
	Windows Server 2008 x64 Enterprise Edition Service Pack 2
Processor	Pentium III or higher
Memory	512 MB

Item	Requirement
Disk space	1 GB
Browser	Internet Explorer 5.0 or later
File viewer	Adobe Reader 6.0 or later to read reports in PDF format

Client

The following requirements apply to client machines accessing the Report Central Web application remotely.

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

Transaction log file

The size of the SQL Server transaction log file (**tempDB**) increases during the filtering process. A good practice is to allocate 25% of the capacity of the database to this log file after you have installed Report Central. See *Managing database disk space*, page 21 for details.

Server name syntax

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

Upgrade path and compatibility

You can upgrade to Report Central v2.7.2 from Report Central v2.6.1 and later.

Report Central v2.7.2 is compatible with the following versions of email security software:

- ◆ SurfControl E-mail Filter v5.5
- ◆ SurfControl E-mail Filter v6.0
- ◆ Websense Email Security v6.1
- ◆ Websense Email Security v7.0
- ◆ Websense Email Security v7.1
- ◆ Websense Email Security v7.2

Database support

Report Central supports the following databases:

- SQL Server 2000
- SQL Server 2005
- SQL Server 2005 Express
- SQL Server 2008

If the installer does not detect a supported database, it offers you the option of installing SQL Server 2005 Express.

2 | Pre-Installation Checklist

During the installation and configuration of Report Central, you provide connection information for servers and databases. Use the checklist below to record information you might need before you run the installer.

☐ **SQL Server logon**: Enter the logon password for the **sa** user.
Password _____

☐ **SQL Server account**: Enter SQL Server services account credentials with administrator rights to the local machine.
Domain\Computer name _____

User name _____

Password _____

☐ **Report Central administrator**: Enter the user name and password of the Report Central administrator.
User name _____

Password _____

☐ **Report Central service account**: If the Report Central database server is not installed on the local machine, you must provide the Windows domain\user name and password for the account on the remote machine.
Domain\User name _____

Password _____

☐ **Report Central database name**: During the configuration of Report Central, you are required to create a link between the Report Central database and the Websense Email Security database.
Display name for the Report Central database _____

Machine name or IP address of the Report Central server _____

Report Central database name _____

☐ **Authentication method**: Select the type of authentication for accessing the Report Central database (Windows or SQL Server). If you decide to use SQL Server authentication, provide logon information for an account that has administrative access to the Report Central database.
User name _____

Password _____

☐ **Database file locations**: If you do not use the default SQL Server file location, specify the correct paths for the data and log files.
Data File _____

Log File _____

☐ **Websense Email Security server identification**: Identify the Websense Email Security database to which the Report Central database must connect.
Display Name _____

Server Name _____

☐ **Websense Email Security server logon credentials**: Define logon credentials for the Websense Email Security database server.
User name _____

Password _____

☐ **Websense Email Security database name**: Identify the Websense Email Security database from which the Report Central database should retrieve data.
Websense Email Security database name _____

☐ **Archive Report Central database records**: If you elect to archive Report Central database records, provide a path and file name for this data.
Archive path and filename _____

3 | Installation

See the Websense Report Central *Administrator's Guide* for information on how to set up and run reports for Websense Email Security.

To install Report Central for Websense Email Security:

1. Navigate to the directory to which you extracted the Websense Email Security installation files (typically, C:\Websense).

2. Run the Report Central executable (**RC_v272_0.exe**) to open the Installation Wizard.

3. Select a destination folder for the extracted installation files.

    The InstallShield Wizard extracts the files and prepares the setup.

    > ✓ **Note**
    > If some files already exist on your system, an "Overwrite Protection" pop-up message appears.

4. Follow the onscreen instructions through the subscription agreement.

5. When prompted, select an installation location for Report Central or accept the default (C:\Program Files), and then click **Next**.
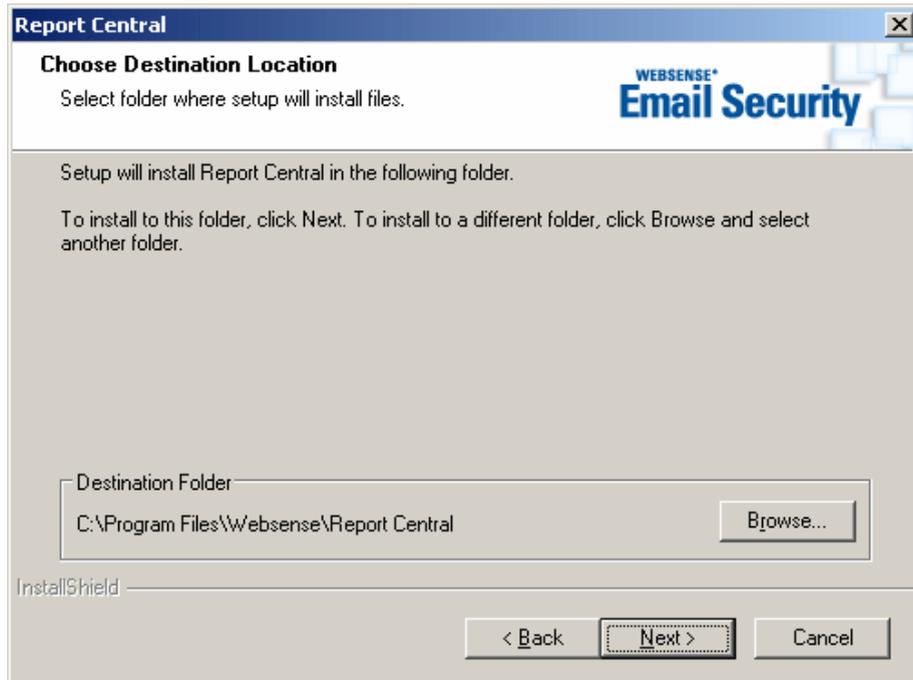

If the installer does not detect a local SQL Server, the Select Database Installation Options screen appears (Step 6). If a supported database is detected, the installer prompts you to create a user name and password for a Report Central administrator (Step 8).

6. If SQL Server is not detected, select one of the following installation options:

    ■ **Install Report Central using SQL 2005 Express**: This selection installs SQL Server 2005 Express on your machine before installing Report Central.

    ■ **Install Report Central and use an existing SQL Server**. This selection installs Report Central only and uses your existing SQL Server. You are asked to identify this SQL Server during the post-installation configuration procedures on page 21. Proceed to Step 8.

7. If you selected SQL Server 2005 Express to install, provide the following information when prompted by the SQL Server installer:

    ■ SQL Server **sa** password: This password cannot be blank.
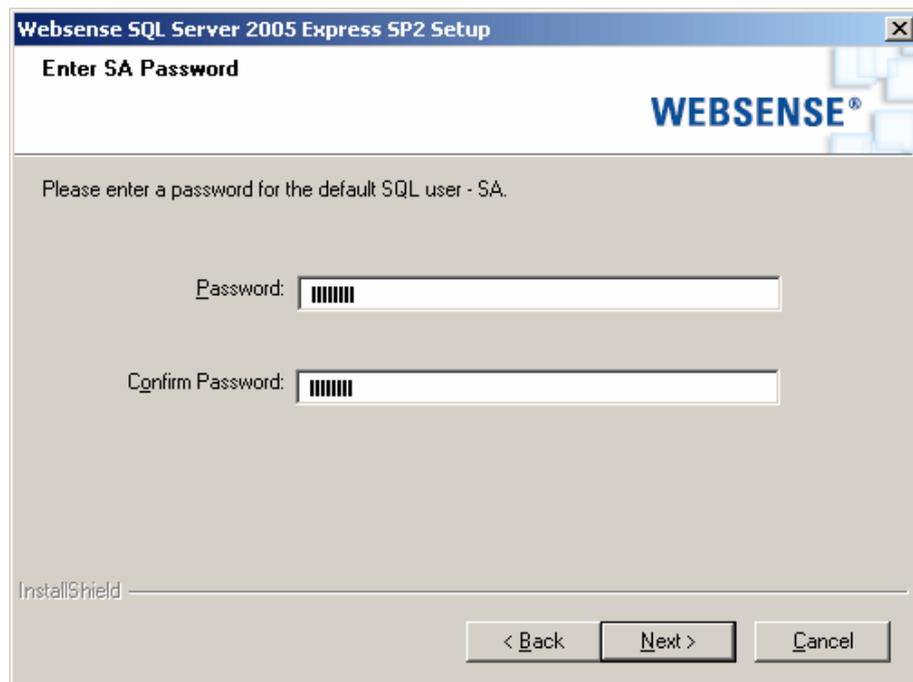
    ■ SQL Server account: Provide logon credentials with administrator rights to the local machine for the SQL Server services.

        • **Domain\Computer name**
        • **User name**
        • **Password**
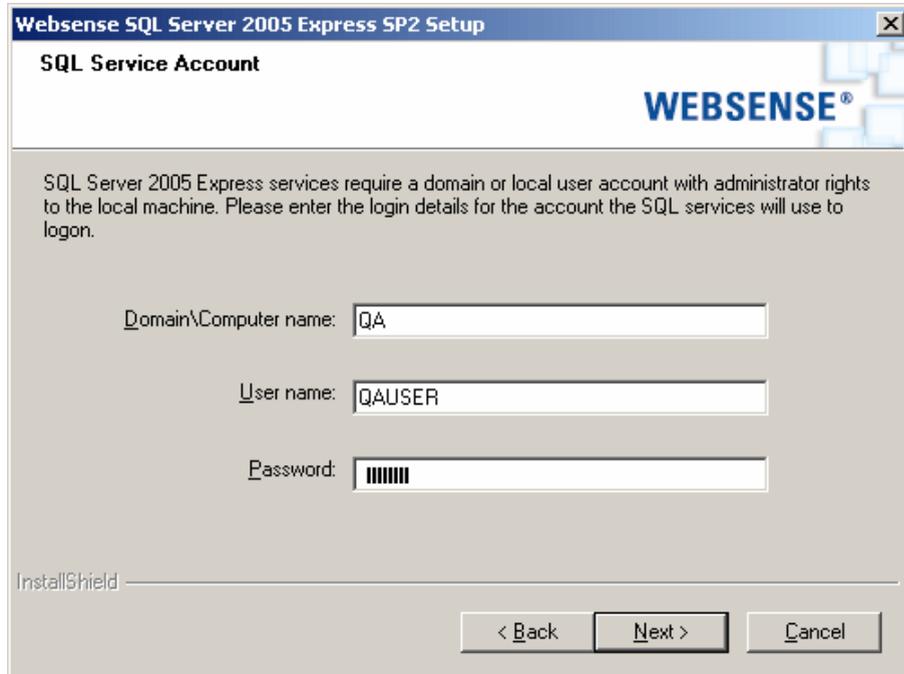
When the SQL Server 2005 Express installation is finished, the Report Central installation continues.

8. Create a user name and password for the Report Central administrator.

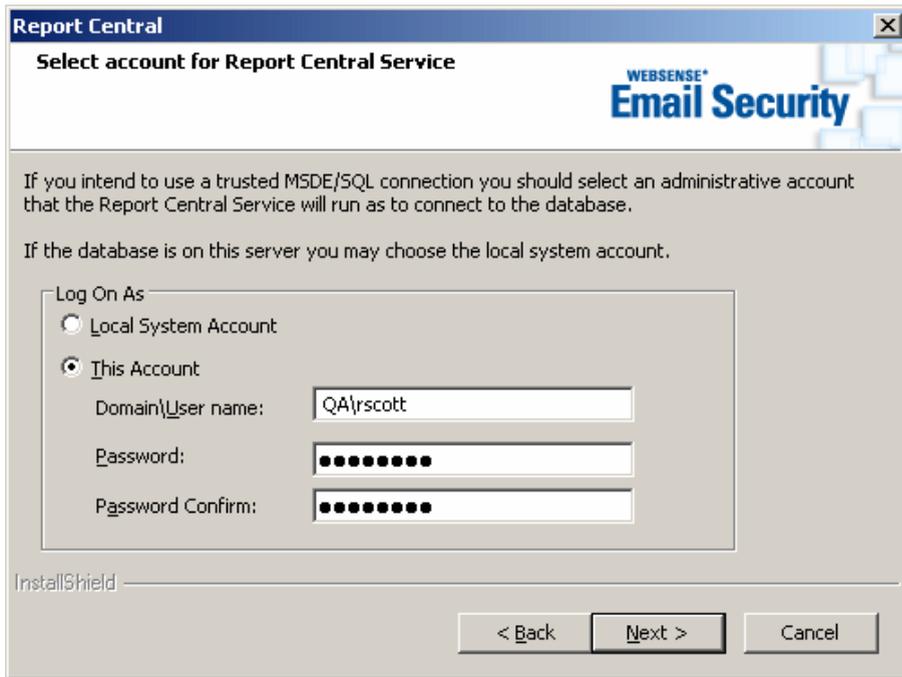> **✓ Note**
>
> Record this information for use later during the initial Report Central logon.

9. Click **Next** to continue.

10. Select an account type for the Report Central service.

- **Local System Account:** Select this account if the Report Central database is (or will be) on the local server.
- **This Account:** Enter a valid Windows domain\user name and password for a database server located on another machine.

> ✓ **Note**
> The remote account must be part of the Local Administrator group on the local computer.

11. Click **Next** to continue.
12. Click **Install** to begin copying the Report Central files.
13. When the installation is complete, click **Finish**.

Upgrading Report Central

It is not necessary to back up any files prior to upgrading Report Central. The upgrade process performs the following tasks:

- Removes the old E-mail Filter directory
- Creates a new Websense installation directory
- Moves saved reports to an archive folder in the new installation directory
- Retains archive and delete settings

◆ Preserves mail settings

◆ Saves user account information

◆ Retains database connection information

To upgrade from an earlier version of Report Central:

1. Navigate to the directory to which you extracted the Websense Email Security installation files (typically, C:\Websense).

2. Run the Report Central executable **RC_v272_0.exe** to open the Installation Wizard.

3. Select a destination folder for the installation files, and then click **Next**.

   The InstallShield Wizard extracts the files and prepares the setup.

   > ✔ **Note**
   >
   > If some files already exist on your system, an Overwrite Protection pop-up message appears.

4. When the upgrade is complete, select to restart the machine, and then click **Finish**.

Authentication

Your selection of a Report Central service account during installation can affect the type of database authentication you select in the post-installation configuration procedures. Windows authentication is not supported if SQL Server is installed on a remote machine *and* you selected **Local System Account** for your Report Central service.

Local system account

If you selected **Local System Account** for the Report Central service during installation, you have the following options when configuring authentication for the Report Central database.

SQL Server Location	SQL Server Authentication	Windows Authentication
Local	Yes	Yes (*1)
Remote	Yes	No

*1–Default installation. Local system account must have system administrator access rights to the SQL Server. You set system administrator rights in the user profile by selecting "sysadmin".

Specified account

If you selected **This Account** for the Report Central service during installation and specified a user name and password, you have the following options when configuring authentication for the Report Central database.

> ✓ **Note**
> The user account specified for the Report Central service must have administrator rights on the Report Central server.

SQL Server Location	SQL Server Authentication	Windows Authentication
Local	Yes	Yes
Remote	Yes	Yes

Post-installation procedures

Before opening Report Central, perform the following configuration procedures:

◆ Configure your browser to allow pop-ups and cookies from the Report Central server.

◆ Allocate database disk space for the **tempDB** file.

◆ Assign links between the Report Central server, the Report Central database server, and the Websense Email Security database server.

Pop-up blockers

Configure your pop-up blocker to allow pop-ups from the Report Central server. For example, if you are using Internet Explorer 6.0 and later:

1. Select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.
2. Enter the URL of the Report Central server.
3. Click **Add**, and then click **Close**.

Cookies

Set your browser to allow cookies from the Report Central server. For example, if you are using Internet Explorer 6.0 and later:

1. Select **Tools** > **Internet Options**.
2. In the Internet Options screen select the Privacy tab, and then click **Sites**.

3. Enter the URL of the Report Central server.

4. Click **Allow**.

Managing database disk space

Make sure that the SQL Server **tempDB** transaction log has enough disk space to execute Report Central queries when generating reports.

To allocate more disk space:

1. Launch SQL Server Enterprise Manager.

2. Select **TempDB** from the database list.

3. Right-click **TempDB**, and then select **Properties** from the shortcut menu.

   The TempDB dialog box is displayed.

4. Select the **Transaction Log** tab.

5. Under **Space Allocated (MB)**, set the value to a minimum of 25% of your database size.

6. Click **OK**.

Linking database servers

Report Central copies data from a Websense Email Security database into a Report Central database to increase reporting performance and reduce the load on the Websense Email Security database. To enable this transfer, you create a link between the Report Central database server and the Websense Email Security database server. This enables an automated update process that is secure and easy to manage.

The linking procedure accomplishes the following:

◆ Creates a new Report Central database or registers an existing Report Central database

◆ Links the Report Central database to the Websense Email Security database for updates

◆ Creates a scheduled update task to automate the process of updating the Report Central database

◆ Configures Report Central database maintenance tasks, such as purging and updating

> **Important**
>
> Ensure that the Report Central server has direct access to the Websense Email Security Database server for validation checking (user name and password), and to check if the Websense Email Security server contains a valid Websense Email Security database. If Report Central does not have direct access, the link fails.

When you log on to Report Central for the first time, the Post Install Configuration welcome screen appears, describing the required setup tasks.
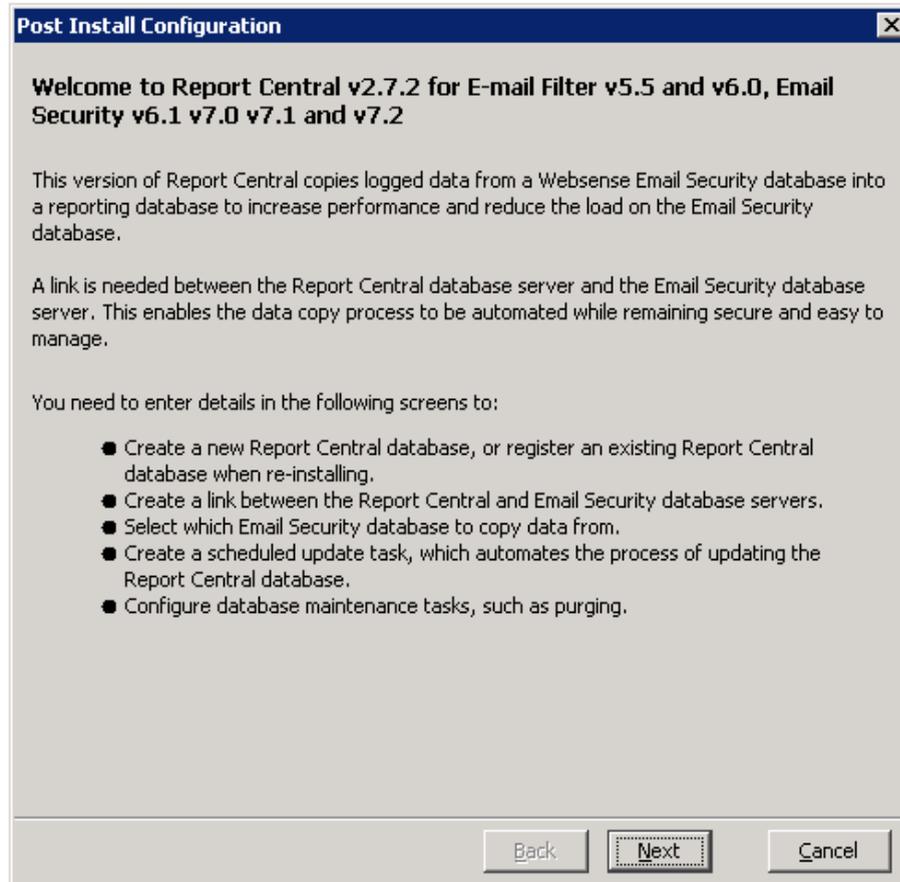
To create a new Report Central database with a link to a Websense Email Security database:

1. Click **Next** in the opening screen to begin.
2. Select one of the following options from the next configuration screen.
   - **Create a new Report Central database**
   - **Register an existing Report Central database**

   This database stores data extracted from Websense Email Security databases.
3. Click **Next**.
4. Identify the Report Central database server.
   - **Display Name**: Name of the Report Central database. This is shown in the main Database Connection screen in Report Central.
   - **Server Name**: Machine name or IP address of the Report Central server.

> ✔ **Note**
> If SQL Server is on a nonstandard port or is an instance on a nonstandard port, enter the IP address and port number in the **Server Name** field in the following format:
>
> ```
> <ip>:port#
> ```
> For example:
>
> ```
> 10.227.4.2:1444
> ```

- **Database Name**: Name of the Report Central database to which you are connecting.

1. Select an **Authentication** method for the Report Central server database.
   - **Windows**: Recommended authentication method.

   > ❗ **Important**
   > Windows authentication is not supported if SQL Server is installed on a remote machine *and* you selected **Local System Account** for your Report Central service.

- **SQL**: Enter the user name and password of a SQL Server account with SQL Server administrative rights.

2. Provide location information for SQL Server files.

   - **Default SQL Server file locations**: Select this if the files were installed in the default SQL Server location.

   - **Use these specific file locations:** Enter a preferred path for the **Data File** and **Log File**. Use this selection if you are creating a new Report Central database.

3. To use a secure connection for the Report Central database, select **Use SSL Connection if available**.

4. Click **Next** to continue.

5. Provide connection specifics for the Websense Email Security database server containing the data to be copied.

- Server identification: **Display Name** and **Server Name** of the Websense Email Security database server. If this server is installed locally, these values are displayed. If this server is installed remotely, enter the appropriate values.

- Login details:
  - **Use current login details**: Uses the same authentication that you specified for the RC database on the previous screen

- **Use specific login details**: Names a different SQL Server user for the Websense Email Security database than was specified on the previous screen

6. Click **Next** to continue.

7. In the screen that appears, identify the Websense Email Security database from which the Report Central database is to retrieve data, and then define the frequency of the update.

The default start time is 01:01 (24-hour clock). At this time, the Scheduler starts the database update.

> ✔ **Note**
> It is good practice to run the Report Central database update when network traffic is light; however, Websense Email Security reports can be run regularly during the day. It is important to run this update so that drill-down reports show accurate information.

8. Click **Next** to continue.

9. In the screen that appears, you can configure database archiving, scheduling, and purging.

- **Archive Database**: Enter the path to the archive folder.
- **Purge Database**: Database purge options are:
  - **Purge all**
  - **Save today's data**
  - **Save data from the last <n> days**
- **Enable Scheduling**: Create a schedule for archiving and purging your database. The scheduler runs the archiving function first.

  The default start time is 01:01 (24-hour clock). At this time, the scheduler starts the database maintenance tasks. It is good practice to run database maintenance when network traffic is light.

  > **Important**
  >
  > Make sure you do *not* schedule database archive or purge tasks to run at the same time as the Report Central database update.

10. Click **Finish**.

See the Websense Report Central *Administrator's Guide* for details on configuring databases from within Report Central.

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