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VSR Quick Install Guide

VSR 2.0

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1. Introduction

This document provides a quick overview of the steps required in accurately setting up the VSR appliance. For a more detailed setup guide, and advanced administrator options, please refer to the Administrator Guide.

The VSR installation is divided into 2 phases:

♦ **In-house:** Installation and initial setup of a clean VSR appliance. See Installation of a clean appliance / re-imaging an existing appliance for details.

♦ **At customer site:** Configuration of a pre installed VSR appliance.

NOTE: **Existing customers should note that VSR 2.0 supports Vital Security versions 9.0 and up.**

1.1 Installation of a Clean Appliance or Re-imaging an Existing Appliance

The following steps should be applied in both the installation of a clean appliance and the re-imaging of an existing one:

♦ **Installation:** A clean VSR appliance to be shipped to a reseller or SE. should be installed internally by Finjan.

♦ **Re-imaging:** Typically done by the reseller or SE in the event that a problem was discovered after shipment of the appliance. In this scenario, after installation is complete, the post installation procedures should be followed as if the appliance has just been received from Finjan.

1.1.1 To create a bootable DVD with VSR Version 2.0

1. Download the VSR 2.0 image (VSR Image) from the Finjan ftp site (approximately 3.16 GB) onto your computer.

2. Burn the image file to a DVD.

NOTE: **To burn an ISO file, ensure that your software includes an ISO burning option.**

1.1.2 To install this Release

1. Insert the VSR 2.0 DVD, and boot the server.

2. When prompted by the Windows console, partition the hard drive as follows:

3. Drive C:\ - 60GB

4. Drive D:\ - Remaining disk space.

5. When prompted to choose the file system type, select NTFS quick format.

6. Select to install Windows on the first partition (C Drive). It will now automatically install Windows and VSR 2.0.

7. When presented with a screen asking for Windows Installation CD2, simply click Cancel.

8. Activate the Windows License (click the keys icon in the system tray and follow the activation wizard.) There is no need to perform registration.

1.1.3 Post installation manual setup

1. Download the SP1-2 patch, extract the SP1-2 folder and run install_vsr_patch.cmd.

2. Download the SP2-2 patch, extract the SP2-2 folder and run install_vsr_patch.cmd.

3. If the VSR is used in a POC/Testing environment whereby an internal DB is used on an appliance other than the 5700 or 8700 (any appliance with a maximum of 2GB RAM), The SQL Server 2005 Enterprise Edition should be manually installed:

   a. Uninstall all SQL Server Express components using **Add or Remove Programs** in the Control Panel (**Start->Settings->Control Panel**).

   b. Run the POC script located at: C:\Install\finjan_poc.cmd

   > **NOTE:** **A manual setup of the SQL Server must be reported to Finjan Finance and licenses should be acquired if this system will be in use for longer than 3 months.**

4. If working with an internal DB (5700 and 8700 boxes or if the DB was manually installed as described in the previous section), install SQL Server 2005 SP3:

   a. On the VSR machine: Run **Start → All Programs → Microsoft SQL Server 2005 → Configuration Tools → SQL Server Configuration Manager**.

   b. Click SQL Server 2005 Services.

   c. Stop all the services listed (Click the Stop icon at the top toolbar for each option or right click and select **Stop**).

d. Run C:\Install\MS-SQL-2005-Enterprise\SQL_2005_ENTERPRISE_SP3\SQLServer2005SP3-KB955706-x86-ENU.exe

e. Follow the on-screen Installation Wizard. Leave all defaults. On the last screen, after the installation, uncheck the **Launch the User Provisioning** checkbox.

f. Start all the SQL Server services (that were stopped on step c).

g. Run Start → All Programs → Microsoft SQL Server 2005 → SQL Server Management Studio.

h. Connect to the database (leave default connection parameters).

i. Ensure that the title displayed states the SQL Server version is 9.0.4035.

5. Configure the required permissions for the VSR operation:

    a. Login to the Central Management Console (CMC), this can be done in one of the following ways:
        i. Locally on the VSR machine: **Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Central Management Console**
        ii. Remotely: http://<VSR Server>:8080/CmcApp

    Login credentials are: user: *administrator*, password: *finjan123*.

> **NOTE:**   **If the administrator user password is changed, ensure that the new password is updated here as well.**

    b. Select **Applications** from the dropdown menu.

    c. Right click the **CMC** and select **Program Object Rights**.

    d. Verify that **Run scripts/binaries** is checked.

    e. Verify that **Schedule with the following operating system credentials** is checked.

    f. Enter Windows user credentials: Username: Administrator, Password: finjan.

    g. Click **Save & Close**.

> **NOTE:**   **If the administrator user password is changed, ensure that the new password is updated here as well.**

6. Schedule the runs of the required programs for the VSR operation:

    a. Select **Folders** from the dropdown menu.

    b. Double click the **Finjan** folder.

    c. Schedule the **Database Loader** program:
        i. Right click Database Loader and select **Schedule**.
        ii. In the left pane, select **Recurrence** under Schedule.
        iii. Select Hourly in the **Run object** dropdown menu.
        iv. Set Hour to 0 and Minute to 10.
        v. Click the Schedule button at the bottom.
        vi. The **History: Database Loader** window will automatically open.
        vii. Click the schedule line created (Status column value is recurring) and click the **Instance Details** icon (under the Manage menu).
        viii. Ensure the **Next Run Time** is set correctly (10 minutes from creation time).

If the **Next Run Time** is the same as the **Creation Time**, please refer to Troubleshooting at the end of this section.

    d. Schedule the **Upload Data** program:
       i. Right click Upload Data and select **Schedule**.
      ii. In the left pane, select **Recurrence** under Schedule.
     iii. Select Daily in the **Run object** dropdown menu.
     iv. Set Start Date/Time to 01:00 AM
      v. Click the Schedule button at the bottom.
     vi. The **History: Upload Data** window will automatically open.
    vii. Click on the schedule line created (Status column value is Recurring) and click on the **Instance details** icon (Under the Manage menu).
   viii. Ensure the **Next Run Time** is set correctly (to the next 1 AM

If the **Next Run Time** is the same as the Creation Time, please refer to Troubleshooting at the end of this section.

    e. Schedule the Daily Maintenance program:
       i. Right click Daily Maintenance and select Schedule.
      ii. In the left pane, select Recurrence under Schedule.
     iii. Select Daily in the Run object dropdown menu.
     iv. Set Start Date/Time to 02:00 AM
      v. Click the Schedule button at the bottom.
     vi. The History: Daily Maintenance window will automatically open.
    vii. Click on the schedule line created (Status column value is **Recurring**) and click on the Instance details icon (Under the Manage menu).
   viii. Ensure the **Next Run Time** is set correctly (to the next 2 AM).

If the **Next Run Time** is the same as the **Creation Time**, please refer to Troubleshooting at the end of this section.

    f. Schedule the Stop **Database Loader** program:
       i. Right click Stop Database Loader and select **Schedule**.
      ii. In the left pane, select Recurrence under Schedule.
     iii. Select Daily in the **Run object** dropdown menu.
     iv. Set Start Date/Time to 06:00 AM
      v. Click the Schedule button at the bottom.
     vi. The **History: Stop Database Loader** window will automatically open.
    vii. Click on the schedule line created (Status column value is Recurring) and click on the Instance details icon (Under the Manage menu).
   viii. Ensure the **Next Run Time** is set correctly (to the next 6 AM).

If the **Next Run Time** is the same as the **Creation Time**, please refer to Troubleshooting at the end of this section.

    g. Schedule the **Archive processed CSV** files program:
- i. Right click Archive processed CSV files and select **Schedule**.
- ii. In the left pane, select **Recurrence** under Schedule.
- iii. Select Hourly in the **Run object** dropdown menu.
- iv. Set Hour to 1 and Minute to 0.
- v. Click the Schedule button at the bottom.
- vi. The **History: Archive processed CSV** files window will automatically open.
- vii. Click on the schedule line created (Status column value is Recurring) and click on the **Instance details** icon (Under the Manage menu).
- viii. Ensure the **Next Run Time** is set correctly (to the next hour).

If the **Next Run Time** is the same as the **Creation Time**, please refer to Troubleshooting at the end of this section

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NOTE: **These schedule settings are optimized for organizations with less activity during nighttime hours. Please consult Finjan support regarding the recommended settings for a different activity profile.**

Troubleshooting

If the **Next Run Time** of the scheduled program is the same as the Creation Time, it indicates the program could not be run. To solve this issue:

a. Select "Servers" on the dropdown menu of the CMC. If all are running, please contact Finjan Support.

b. If not all servers are running: Open the Central Configuration Manager (**Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Central Configuration Manager**) on the VSR machine and restart the "Server Intelligence Agent" service.

c. Re-login to the CMC and check the servers' status again. Allow a few minutes and then refresh the servers view. If not all servers are running, please contact Finjan Support.

7. Upload all available reports to the VSR:

    a. Download the archive containing all supported reports for this version [here](#).

    b. Extract the archive to a folder of your choice accessible from the VSR machine.

    c. Run the Publishing Wizard: Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Publishing Wizard and follow the on screen instructions. For details, please refer to the Publishing Reports guide

8. Follow this step only if you are configuring an appliance to work with an internal DB (5700 or 8700 boxes):

    a. Set the SQL Server DB to accept connections using both SQL authentication and Windows Authentication:
      i. Start the SQL Management Studio and connect to the database.
      ii. Right click root item (SQL Server Name/IP) in the object explorer and select **properties**.
      iii. Select the **Security Tab**
      iv. Under **Server authentication** check the option **SQL Server** and **Windows Authentication Mode** and
      v. Click **OK** to save and exit.
      vi. Restart the SQL Server service.

1.2 Setup of an installed VSR appliance (shipped from Finjan) by the SE or Reseller

The following steps should be done at the customer site on a new appliance received directly from Finjan or an existing re-imaged appliance:

1.2.1 External Database configuration (5070 or 8070 boxes)

Follow this section only if you are configuring an appliance intended to work with an external DB (5070 or 8070 boxes) and then continue setting up your system according to the "VSR Configuration" section below.

If you are working with an internal DB (5700 or 8700 boxes), skip this section and continue directly to the "VSR Configuration" section below.

NOTE: **In all items of this section, if the default DB queue name was not changed, entering the IP is sufficient (full IP\queue name is not required)**

1. Set the SQL Server DB to accept connections using both SQL Authentication and Windows Authentication:
    a. Start the **SQL Management Studio** and connect to the database.
    b. Right click **SQL Server IP** in the object explorer and select **properties**.
    c. Select the **Security Tab**.

d. Under Server authentication check the **SQL Server** and **Windows Authentication Mode** option.

2. Make a copy of create_database.sql located on the VSR machine under C:\install\Finjan.

3. Open the copy for editing using **SQL Management Studio** and change the FILENAME parameter in the Create database and log on commands, to point to the directory where you wish to store your data. Please note that this directory should already exist.
Run the updated script file on your external SQL Server and verify that it completes successfully. Note that this script also creates a user: finjansys, with password: finjanpw on the database, with permissions to the newly created VitalSecurity database.

4. Run the script update_database.sql included in the **SP1-2 patch directory** on the external DB and verify that it completes successfully.

5. Run the script update_database.sql included in the **SP2-2 patch directory** on the external DB and verify that it completes successfully.

6. Verify that you are able to open a connection to the database machine from the VSR machine (using the sqlcmd tool or SQL Management Studio).

7. Configure the ODBC on your machine to access the external database:
   a. Open **Control Panel → Administrative Tools → Data Sources (ODBC)**
   b. Select VitalSecurity and click **Configure** (in the User DSN tab).
   c. Set the server to your external database IP\queue name and click **Next**.
   d. Select SQL Server authentication and insert the Username *finjansys* and Password *finjanpw.*
   e. Click **Next** and then **Finish**.
   f. Test your connection by clicking Test Data Source. 'TESTS COMPLETED SUCCESSFULLY!' Message should appear.
   g. Repeat steps b-f for the System DSN tab.

8. Set the database location for the Database Loader process:
   a. Login to the Central Management Console (CMC). this can be done in one of the following ways:
      i. Locally on the VSR machine**: Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Central Management Console**.
      ii. Remotely: http://<VSR Server>:8080/CmcApp

   Login credentials are: user: *administrator*, password: *finjan123*

   b. Select **Folders** from the dropdown menu.
   c. Double click the **Finjan** folder.
   d. Right click **Database Loader** and select **Properties**.

e. Expand the **Default Settings** in the left pane, and select **Program Parameters**.

f. Edit the **Arguments** field and set -db_location=IP\queue name (instead of –db.location=.), ensure the -pswd field has the correct password (if no changes to the password were made, it remains -pswd=finjanpw)

g. Reschedule the **Database Loader** program (in History view,delete the previous schedule and create a new one, using new defaults

9. Select all reports (repeat this step for every folder in use), right click and select **Database Configuration**.

10. Enter the database user and password.

11. Ensure that the "Use same database logon as when report is run" radio button is checked.

12. Click **Update**.

> ✎ **NOTE:** Please note that this procedure must be repeated for every new report added in the future.

13. Set DB password to configure the **Data Connector** for the BusinessView from the DB (required only if the password has been modified):

a. On the VSR machine, open the Business Object Viewer: **Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Business View Manager.**

b. Log in using the following credentials: System: *localhost,* Username: *administrator*, Password: *finjan123*, Authentication: *Enterprise.*

c. Click **Cancel** on the Welcome screen.

d. Click the view menu and select **Repository Explorer**.

e. Double click **GetUsersDC**.

f. Edit the password field in the Property Browser and **Save** (Ctrl+S).

14. Restart the VSR:

Open the Central Configuration Manager (**Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Central Configuration Manager**) on the VSR machine and restart the "Server Intelligence Agent" service.

1.2.2   VSR Configuration (all appliances):

1. Configure the time zone to be used by the Reporter (for scheduling reports):

    a. Login to the Central Management Console (CMC), this can be done in one of the following ways:

        i. Locally on the VSR machine: Start → All Programs → Crystal Reports Server 2008 → Crystal Reports Server 2008 → Central Management Console

        ii. Remotely: http://<VSR Server>:8080/CmcApp

Login credentials are: user: ***administrator***, password: ***finjan123***

    b. Click the **Preferences** link at the top right of the screen.

    c. Set the time zone.

2. If Browse Habits reports are not required, we recommend modifying the Database Loader process properties for improved performance. To modify the Database Loader properties:

    a. Select **Folders**.

    b. Double click the **Finjan** folder

    c. Right click the **Database Loader** and select **Properties**.

    d. Edit the **Program Parameters** under the **Default Settings** link in the left pane, and remove the "-create" flag at the end of the **Arguments** field.

3. Configure the Vital Security Log Server to send the data to the VSR machine:

    a. Log in to Vital Security

    b. Navigate to **Administration → System Settings → Finjan Devices**.

    c. Expand the IP node of the Log Server, expand the Log Server node, click **Log Properties**.

    d. Click **Log Archiving** tab.

    e. Edit the Log Archiving Location to connect to the VSR machine: Use one of the following connection methods:

- **Using Samba:**

        i. Set the archive location to //<VSR_SERVER_IP>/incoming

        ii. Set the user to <VSR machine workgroup>/archive, the default workgroup after the installation is NONE.

        iii. Set password to finjan.

        iv. Select Extended Format in the Archiving Format.

- **Using SFTP:**

        i. Set the archive location to <VSR_SERVER_IP>/cygdrive/c/share/incoming/

        ii. Set the user to archive

        iii. Set password to finjan.

        iv. Select Extended Format in the Archiving Format.

4. Configure the Vital Security **Default Logging Policy** to log all information to the archive (now sending the data to the VSR machine):

   a. Check the default logging policy under **Policies → Default Policy Settings**.

   b. Navigate to **Policies → Logging**.

   c. Duplicate the Default logging policy and name it **Default logging policy for VSR**.

   d. Edit all rules in **Default logging policy for VSR** and check "Archive" in addition to the existing logging targets they already have set.

   e. Right click **Default logging policy for VSR** and select **New Rule**.

   f. Set the name to **Log all to archive** and ensure only **Archive** is checked (uncheck Log).

   g. Click **Save**.

   h. Go to **Policies → Default Logging Policy**

   i. Click **Edit**

   j. Set the **Default Logging Policy for VSR** as the default logging policy.

   k. Repeat steps d-g for all logging policies in use.

1.2.3   VSR License

VSR arrives pre-installed with an evaluation license valid for 60 days from installation day.

Note that once the VSR is purchased, the end customer should receive a link to obtain the permanent license key. Please contact Finjan Finance for details.