

GWAVA Inc.

# Retain for Social Media

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## Installation Guide

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### Intended Audience

This guide is intended for system administrators and network administrators.

## Retain for Social Media Overview

Retain for Social Media installs to a virtual machine and fits into an existing network between the local network and the internet connection. Retain for Social Media works with or as a proxy to gather all social media communication to Facebook and Twitter, providing an interface by which Retain can archive social media interaction from the network. The proxy can either be setup as a hidden or silent proxy, or users may be created which require authentication to gain access. If a current proxy is being used in the network system, Retain for Social Media (RSM) can utilize ICAP to integrate seamlessly into the current network setup and this is the recommended setup.

## **System Requirements**

Functioning VMWare ESXi 5 server with sufficient free resources for user load. The distribution of Retain for Social Media (RSM) is through an OVF image. The OVF image is set with the minimum system requirements. Further configuration must be completed after OVF deployment.

### **Minimum requirements (default)**

This system is the recommended system for Retain for Social Media (note: this will vary depending on the number of users of the system. (Default load assumes around 100 users.):

- RAM: 4Gb virtual
- Storage: 50GB virtual drive
- Network: 2x virtual Ethernet adaptors

### **Additional Requirements (additional users)**

- Additional resources will be required for more users. As a rule of thumb, for every 100 users, an additional 1GB of RAM and 50GB of storage should be allocated. An extra CPU core should also be added per 200 users.

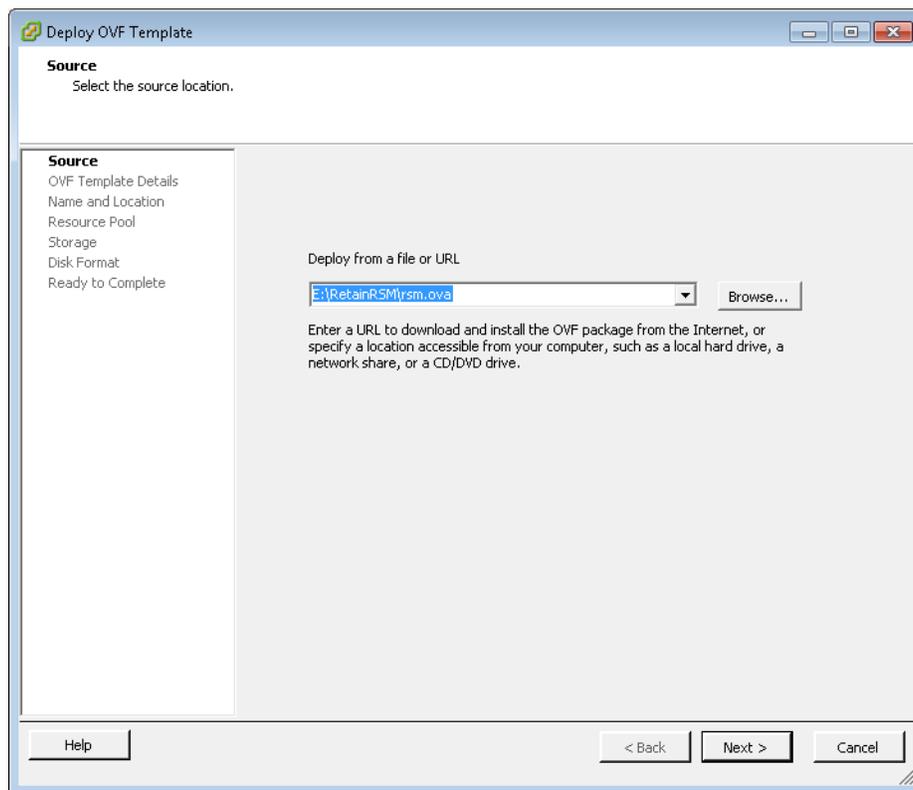
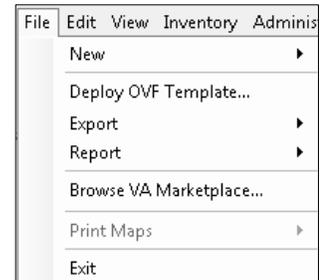
### **Supported Resource Levels:**

- Additional virtual memory, the maximum memory supported is 32GB
- Additional virtual storage, up to 2TB is supported
- Additional virtual ethernet adaptors
- Additional virtual CPU's, up to 8

## Install

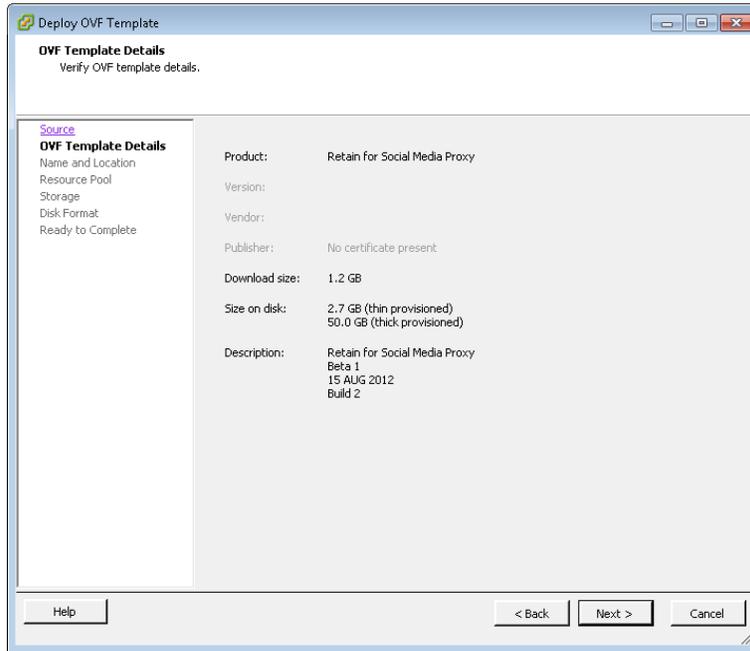
Retain for Social Media is distributed as an .OVA file for quick implementation in the VMware ESXi 5 server.

To install Retain for Social Media (RSM) server, log in to the VMware ESXi server and select 'Deploy OVF Template'. Browse to the location of the RSM .OVA file and open it to begin the wizard.

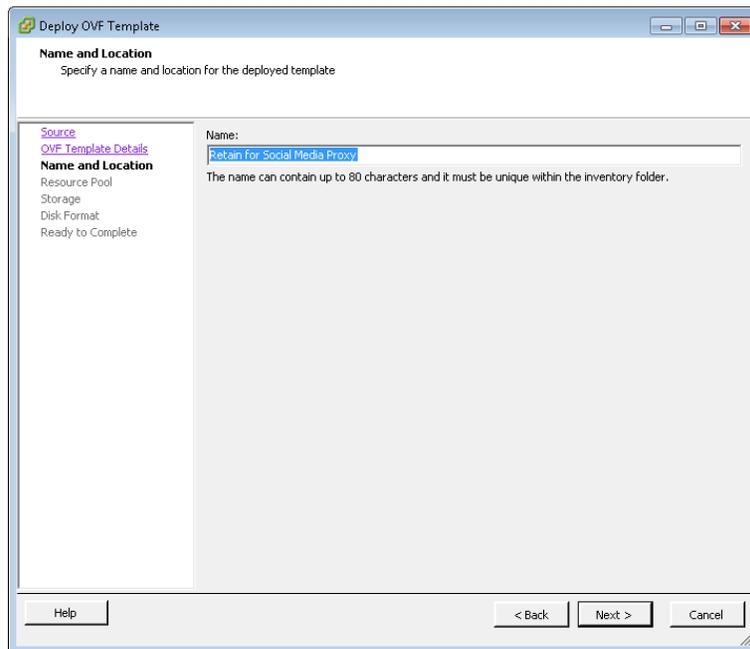


Follow the wizard.

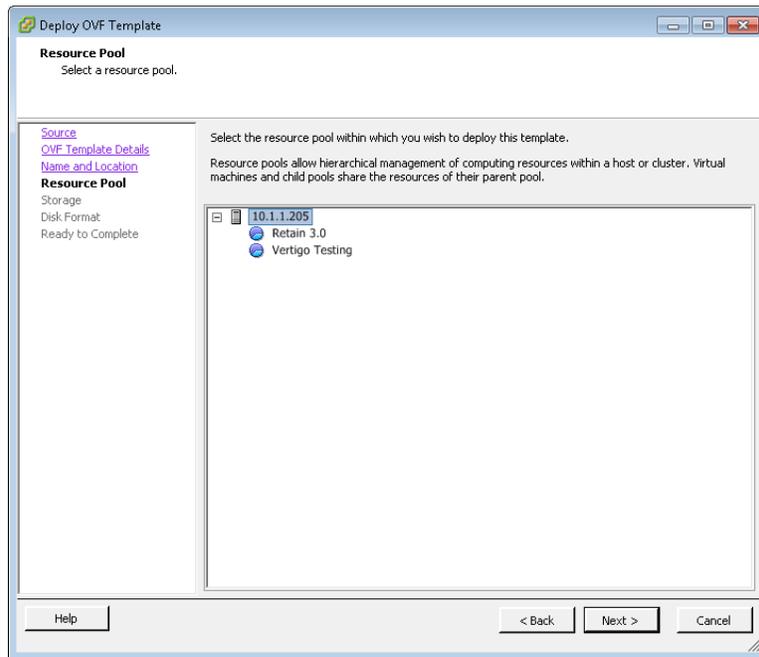
The default settings of the OVF template are generously set for the space needed, and not all will be required at first. Select 'Next' to continue.



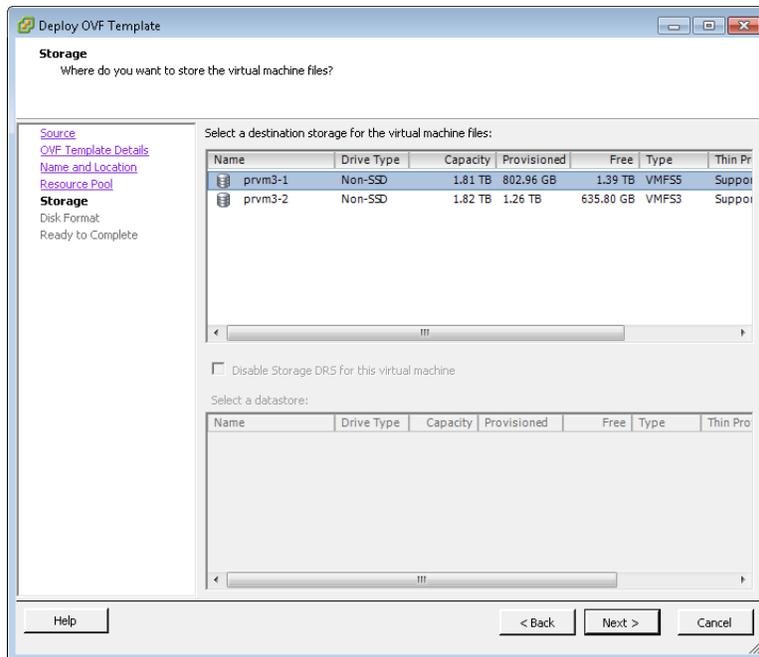
The name of the RSM appliance can be changed at will. Name the RSM deployment as desired and select 'Next'.



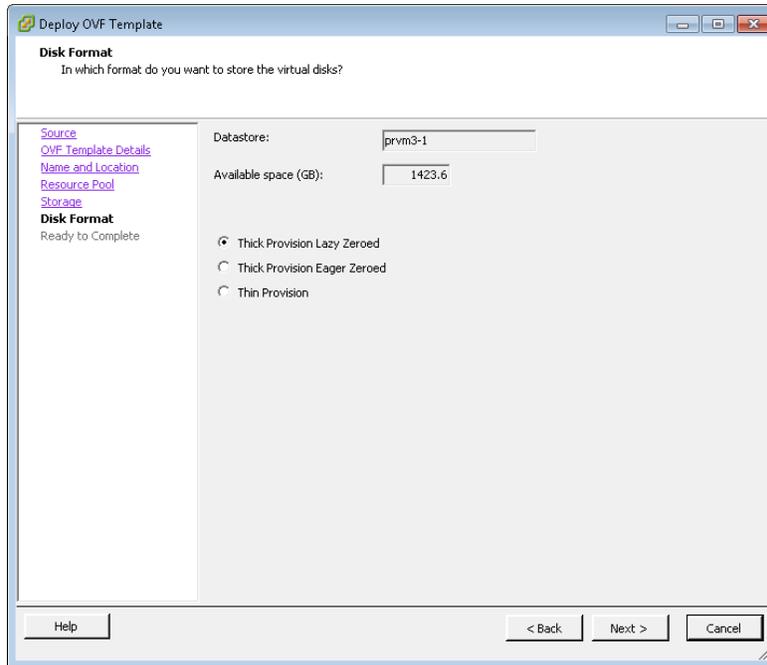
Select the location where the RSM is to be located in the ESXi deployment, and select 'Next'.



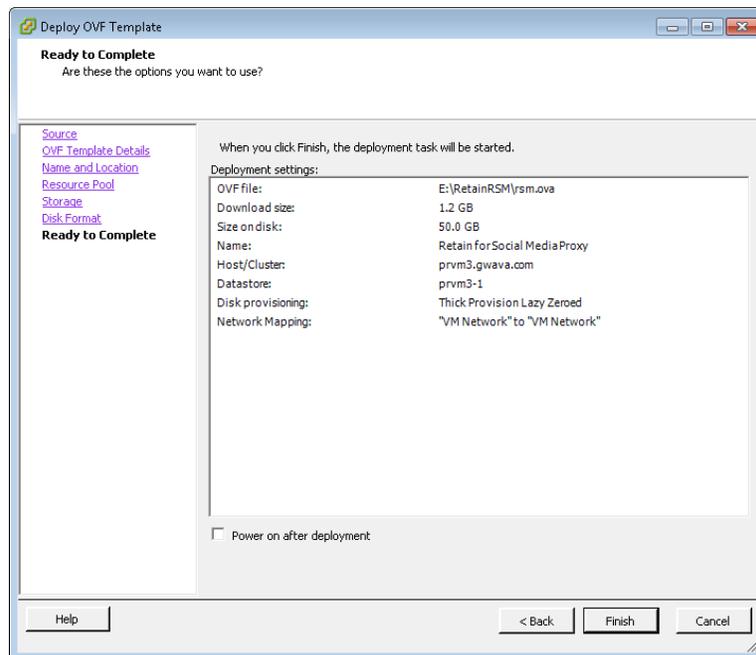
Select the disk which will house the virtual machine and select 'Next'.



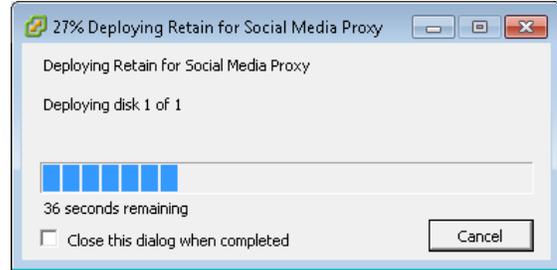
It is recommended that RSM is deployed as a “Thin Provision”, as not all of the storage resources reserved for the deployment will be required for normal use. Select ‘Thin Provision’, unless the local implementation of the ESXi server requires otherwise, and select ‘Next’



The overview displays settings. Ensure they are correct before moving on. Review the settings to ensure they are correct, then select ‘Finish’ to initiate the deployment.



Wait for the RSM appliance to be created. The process may take several minutes depending on the speed of the network connection and the ESXi server.



When the deployment is completed, click 'Close' and then return to the ESXi console. Select the RSM machine and start it up.



The RSM appliance will take several minutes to setup and start. Once the machine has completed the startup, you will see this page on the console:

```
The configuration is done via the web interface. using the
passwords initially provided or configured.

In order to change the LAN IP press Ctrl-Alt-Ins and follow the
prompts.

The current primary LAN IP configuration is:
Local IPs: 169.1.2.3/24
Internet IPs: 192.168.1.120
Site key: gwava-qa-brice
Serial: VM564D4DEA58101FAB5067C32338A6
Release: Perseus (28.0-dev)
Brand: GWAVA
Platform: Software
Software: 30

a-brice.safenetbox.biz !
```

RSM will attempt to gain an IP address via DHCP, but if DHCP is not available, then the IP address will require manual configuration. Press Control+Alt+Insert to begin the configuration and follow the prompts. The prompts to change settings will be displayed in the box at the bottom of the console. If an IP address is displayed, configuration should be completed through the web UI at that address.

The box will display scrolling information, usually the connection address to the RSM appliance from the web.

## Initial Configuration

To connect to the web UI for RSM, simply put the IP address of the server into a browser.

ie. `http://<server_IP>`

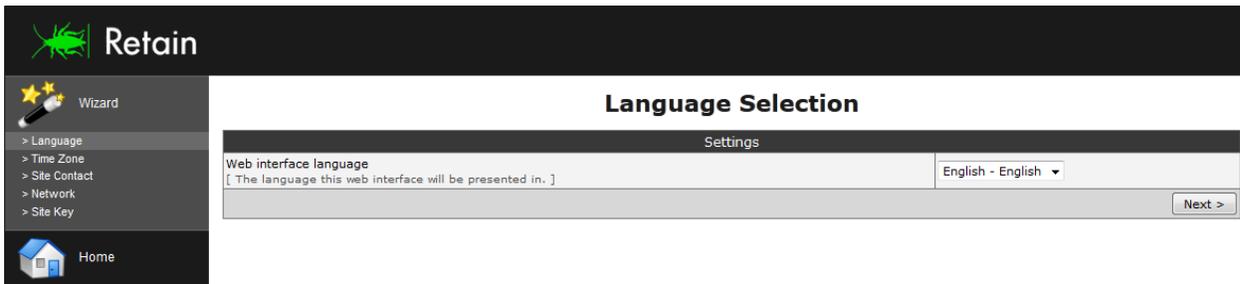
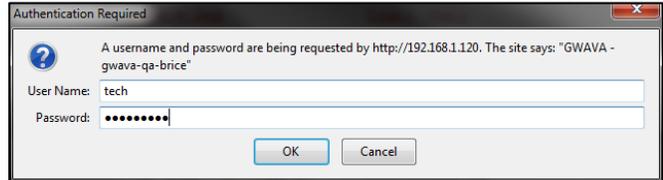
On connection, a login will be required. The default login for the RSM is:

User: tech

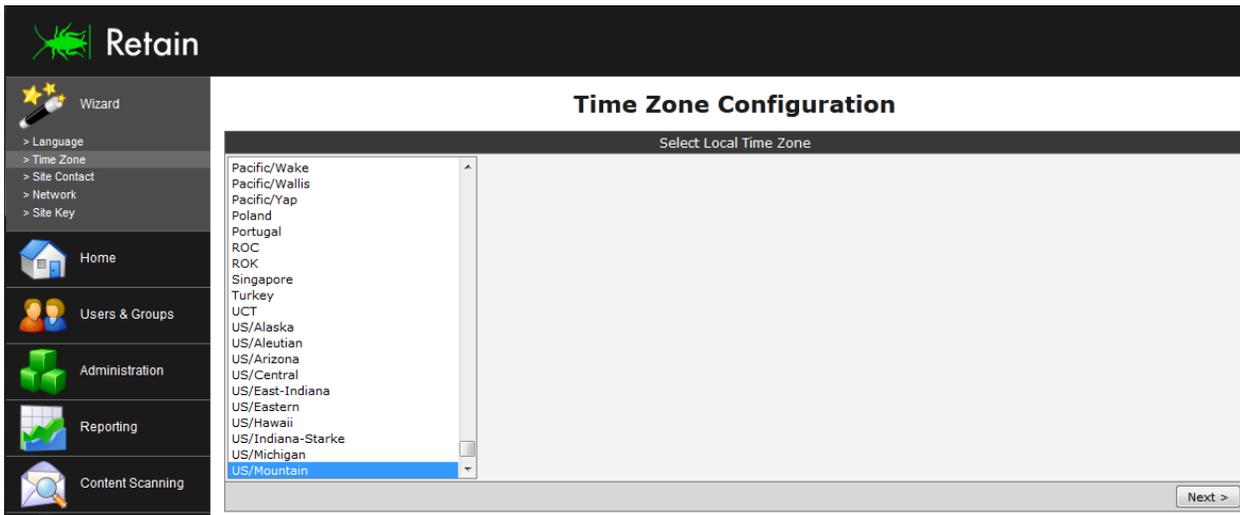
Password: retain

Once you have logged-into RSM, open the wizard from the link, or click on 'Wizard' from the top of the left hand menu to begin configuration.

Select the language and click 'Next'.



Then select the time zone of the RSM server and click 'Next' to continue.



The Site Contact information must be filled-out to ensure proper function. All sections must be filled out to continue.



**Wizard**

- > Language
- > Time Zone
- > Site Contact
- > Network
- > Site Key

**Home**

**Users & Groups**

**Administration**

**Reporting**

**Content Scanning**

**Workstation Agent**

**Internet Auth**

**Configuration**

User: tech [\[logout\]](#)  
 Site Key: gwava-qa-james  
 Site: GWAVA James

## Site Contact Information

Alert Emails

<b>Alert email address(es)</b> <small>[ Important warnings and alerts relating to various functions of the Retain for Social Media. Emails such as update notifications and email delivery problems will be sent to this address. More than one address can be entered, separated by a comma ]</small>	<input type="text" value="bob@gwava.com"/>
<b>Link status alert address(es)</b> <small>[ When the internet link goes up or down, an alert will be sent to the email address provided. More than one address can be entered, separated by a comma ]</small>	<input type="text" value="bob@gwava.com"/>

Site Contact Information

<b>Organisation</b>	<input type="text" value="GWAVA"/>
<b>Type of Organisation</b> <small>[ The industry which best describes the organisation where the Retain for Social Media is installed ]</small>	<input type="text" value="Technology"/>
<b>Site contact (full name)</b> <small>[ The name of a person on site that can be contacted in the case where urgent local action is required. The GWAVA partner will generally be contacted in the first instance ]</small>	<input type="text" value="GWAVA Man"/>
<b>Position/Authority</b> <small>[ The position/authority of the above contact person within the organisation. ]</small>	<input type="text" value="Sitting"/>
<b>Phone number</b> <small>[ A phone number for the above contact person at the site where the Retain for Social Media is installed. e.g. +61 7 3123 4567 ]</small>	<input type="text" value="1800-go-gwava"/>
<b>Mobile phone number for critical SMS alerts</b> <small>[ A phone number for sending critical SMS alerts concerning problems or service interruptions of the Retain for Social Media or the services it provides. e.g. +61 4 0123 4567 ]</small>	<input type="text"/>
<b>Site address</b> <small>[ The Street Address of the site where the Retain for Social Media is physically installed. This is used to ensure accurate delivery of replacement units and service requirements. It also assists GWAVA in planning and management as outlined in the End User Terms ]</small>	<input type="text" value="Address Line 1"/> 100 Alexis Nihon e.g. Level 1/888 Brunswick Street  <input type="text" value="Address Line 2"/> Suite 500 (optional)  <input type="text" value="Suburb / City"/> Montreal e.g. New Farm  State <input type="text" value="QC"/> Postcode/Zip <input type="text" value="H4M 2P1"/> e.g. Queensland e.g. 4005  Country <input type="text" value="Canada"/> e.g. Australia
<b>Email address</b> <small>[ An email address for the above contact person at the site where the Retain for Social Media is installed. ]</small>	<input type="text" value="bob@gwava.com"/>

Technical Contact Information

<b>Same as site contact information</b> <small>[ Use the site contact details given above for the technical contact details. ]</small>	<input checked="" type="checkbox"/>
<b>Organisation</b> <small>[ The organisation of the technical contact ]</small>	<input type="text" value="GWAVA"/>
<b>Technical contact (full name)</b> <small>[ The name of a person that can be contacted for technical enquiries. This person will generally be contacted first for non-urgent enquiries. ]</small>	<input type="text" value="GWAVA Man"/>
<b>Position/Authority</b> <small>[ The position/authority of the technical contact within the above organisation ]</small>	<input type="text" value="Sitting"/>
<b>Phone number</b> <small>[ A phone number for the above technical contact e.g. +61 7 3123 4567 ]</small>	<input type="text" value="1800-go-gwava"/>
<b>Address</b> <small>[ The street address of the technical contact ]</small>	<input type="text" value="Address Line 1"/> 100 Alexis Nihon e.g. Level 1/888 Brunswick Street  <input type="text" value="Address Line 2"/> Suite 500 (optional)  <input type="text" value="Suburb / City"/> Montreal e.g. New Farm  State <input type="text" value="QC"/> Postcode/Zip <input type="text" value="H4M 2P1"/> e.g. Queensland e.g. 4005  Country <input type="text" value="Canada"/> e.g. Australia
<b>Email address</b> <small>[ A contact email address for the technical contact ]</small>	<input type="text" value="bob@gwava.com"/>

[Next >](#)

If the technical contact information is the same as the site information, simply checking the 'Same as site contact information' box will automatically copy the information for you.

Network configuration will vary depending on the different network settings which exist at the current site, consult the Network Administrator for information.

Local Link	
IP Address	169.1.2.3
Netmask	255.255.255.0
DHCP enabled?	<input type="checkbox"/>
DHCP Start address	192.168.0.100
DHCP End address	192.168.0.200

Internet Link	
Type of Internet Link	Ethernet
IP Address	192.168.1.120
Netmask	255.255.255.0
Gateway	192.168.1.1

The Internet Address should be correctly configured and the different types or protocols for the internet address may be selected. Please consult support to receive specific information related to implementation in the current network. Different networks settings cannot be adequately described here and custom implementation advice may be required.

**Important**

When you make changes to the Retain for Social Media configuration, they will not take effect until you "Apply Changes".

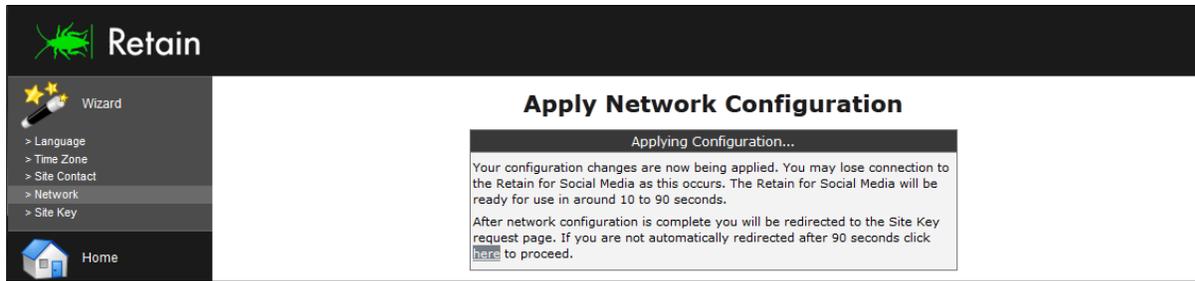
This will take around 10 to 90 seconds depending on the configuration changes made.

[Apply Changes](#)

When the Network settings are satisfactory, select the 'Apply Changes' button to adjust the network settings as specified.

RSM will reinitiate the network settings as configured and setup default services, this may take several minutes depending on system resources. The system will redirect you to the new address with the specified link and connect. If it does not, reconnect to the RSM appliance with the specified address.

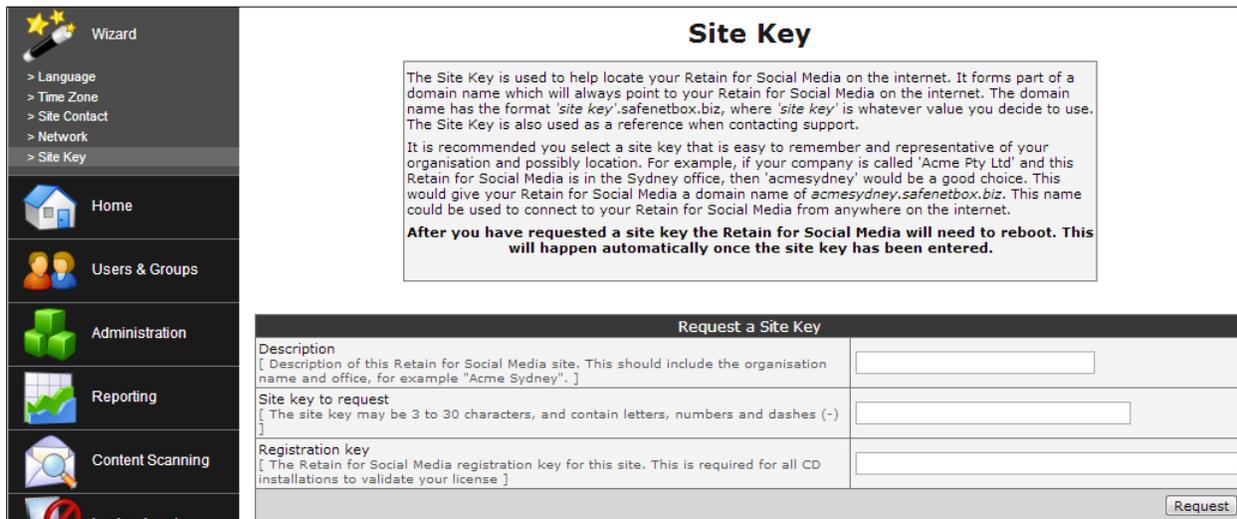
If the network settings have been modified, after applying changes the admin must re-login at the new address and restart the wizard. Previously set changes and settings will be preserved.



The Description simply describes the implementation of the RSM Gateway.

The Site Key helps identify the RSM Gateway and is part of the external access URL. The format used is '<site key>.safenetbox.biz'. A site key which is distinct as belonging to the business or organization should be used in the site key request. For example; a request for a site key of 'retainmontreal' will result in an access URL of retainmontreal.safenetbox.biz. If the requested site key is already in use then the wizard will reply with a note saying so and a new site key should be requested.

The Registration key is the license for the RSM Gateway, and was sent on purchase of Retain for Social Media.



Once the wizard is complete, check to confirm that the Content Scanning is enabled for the licensed social media formats. Select the "Content Scanning" link from the left; it should display Retain for Social Media web content scanning enabled 'YES', as shown below.

Current Settings	
Retain for Social Media web content scanning enabled	YES
Retain for Social Media instant messaging client scanning enabled	NOT INSTALLED

If the setting is not enabled, select the 'General' link under Content Scanning to enter the "General Settings" configuration page.

On the General Settings page, check the 'Retain for Social Media Settings' section and ensure that the Social Media modules are both enabled with a 'yes' selection. If they are not, change them to 'yes' and select 'Update'.

General Settings	
Content Scanning Administrator Email Address [ This address is substituted for the \$admin token in alert emails ]	postmaster@gwava-qa-master.safenetbox.biz
Type of Organisation [ The industry which best describes the organisation where the Retain for Social Media is installed. This is used to determine which set of suggested rules is installed. ]	Technology
Add suggested rules, policies and reports [ Adds a set of Content Scanning rules, URL Filtering policies, and reports which are recommended by GWAVA. These rules and policies will be disabled by default, and those which are relevant must be manually enabled. ]	<a href="#">Add suggested settings</a>
<a href="#">Update</a>	
Retain for Social Media Settings	
Enable Retain for Social Media scanning of web content? [ Retain for Social Media provides the ability to scan communication from websites such as Facebook or Twitter. This option will enable or disable this ability. [Recommended: yes] ]	yes
Retain for Social Media custom server URLs [ URLs of custom servers running Retain for Social Media-supported services. ]	<a href="#">Edit...</a>
Archival mode [ What Retain for Social Media content will be archived for external processing. Attachments include file uploads and webmail attachments on supported sites. Note: attachments larger than 100 MB will never be archived. ]	Text and Attachments
Maximum Retain for Social Media records age [ Retain for Social Media records older than this value (in days) are automatically deleted. This applies to both Retain for Social Media Events and Moderation Queue / Moderation History data. At most 300000 records will be kept, regardless of age. There are approximately 0 events being stored locally. ]	182
<a href="#">Purge old Retain for Social Media records</a> <a href="#">Update</a>	

Once the settings have been confirmed, RSM is ready. Further configuration for different network setups is completed under the 'Configuration' section. General settings are displayed below. Please consult Retain Support on further configuration.

General settings in the Web Proxy Configuration are displayed below.

By default, a transparent proxy is set, with Direct Proxy mode enabled as direct and HTTPS for all traffic. The RSM is set to utilize the HTTP port 8080. The port and memory settings are subject to implementation and may change, but note the setting changes.

Settings	
<b>Enable transparent proxy</b> [ The Retain for Social Media can automatically proxy all traffic going to the internet. In "transparent" mode all outbound traffic on port 80 will be intercepted and cached (requires no client configuration). Traffic will only be recorded against the user if Internet Authentication is being used. This must be turned on for Web Filtering or URL Filtering, or port 80 should be firewalled off in the LAN to Internet Firewall. <i>[Recommended: yes]</i> ]	yes ▾
<b>Transparent proxy exclusions</b> [ Remote and local hosts or networks to exclude from the transparent web proxy ]	<a href="#">Edit...</a>
<b>HTTPS inspection</b> [ The Retain for Social Media can intercept and inspect all transparent and/or direct proxied HTTPS traffic. With this option enabled URL filtering policies will be matched against HTTPS traffic. Proxied hosts require a site specific CA certificate installed in their browser to suppress certificate validation warnings. This site's unique CA certificate is available <a href="#">here</a> ]	Enabled for all traffic ▾
<b>HTTPS inspection exclusions</b> [ Remote and local hosts or networks to exclude from HTTPS inspection ]	<a href="#">Edit...</a>
<b>Direct proxy mode</b> [ When on, the direct proxy serves a http proxy on the Retain for Social Media's internal interface. Optionally, either Retain for Social Media authentication can be used, or NTLM authentication can be used. NTLM Authentication requires that this Retain for Social Media join the Active Directory Server ]	Direct ▾
<b>HTTP proxy interface port</b> [ This setting selects the TCP port that the HTTP proxy interface runs on. <i>[Default: 8080]</i> ]	8080
<b>Proxy auto-configuration exclusions</b> [ Domains or networks to exclude from the direct proxy when using a proxy.pac or wpad.dat file to automatically configure web proxy settings. ]	<a href="#">Edit...</a>
<b>Direct proxy authentication whitelist</b> [ Remote hosts that don't need to authenticate in order for direct proxy clients to access them ]	<a href="#">Edit...</a>
<b>Maximum proxy disk cache size</b> [ Approximate maximum amount of cached web data that will be stored by the Retain for Social Media web proxy. Use this setting to control the amount of storage space used by the cache. Set to 0 to disable the cache. ]	1 GB
<b>Maximum cached object size</b> [ The maximum object size that Retain for Social Media web proxy will hold in its cache. Objects bigger than this value will not be cached. <i>[Recommended: 10MB]</i> ]	10 MB
<b>Configure Apple and large object cache</b> [ Configure alternative cache for large objects, including updates from Apple ]	<a href="#">Edit...</a>
<b>Upstream web proxy host</b> [ When you wish the Retain for Social Media to forward all proxied web requests to an upstream web proxy, specify the host and port here. e.g. "proxy.example.com:8080" ]	
<b>Upstream proxy username</b> [ If the upstream proxy server requires authentication to access it, it can be configured here ]	
<b>Upstream proxy password</b> [ The password for the upstream proxy server ]	
<b>CONNECT Proxy Configuration</b> [ Upstream (non-HTTP) outbound proxy configuration ]	<a href="#">Edit...</a>
<b>Record full URL in proxy logs</b> [ By default the Retain for Social Media will not record and GET parameters from urls in the proxy logs, if enabled, the full url including all information after the ? mark will be retained. <i>[Recommended: no]</i> ]	no ▾
<b>Provide proxy on internet interface</b> [ If enabled the Retain for Social Media firewall will not restrict access to the proxy to hosts on the LAN and any machine that can contact the Retain for Social Media will be able to use the proxy. This is only suitable where the Retain for Social Media is not internet accessible and is a potential security risk. <i>[Recommended: no]</i> ]	yes ▾ <b>Warning: Allowing the internet to access the web proxy is a security risk.</b>

[Update](#)

RSM Installation is now complete. To archive data from the RSM, Retain Server needs to be configured with the Social Media module and a worker to connect to and archive data from RSM. See the General Admin guide for module information.

To begin RSM data capture, all workstations and devices must be configured to utilize the RSM Gateway as a proxy. See below for configuration options.

## Browser and Workstation Configuration

Though RSM installation is complete, RSM cannot archive social media communications unless internet traffic is routed through the proxy. There are a few options for accomplishing this task:

- Corporate network proxy integration
- RSM manual proxy setup
- Workstation Agent

Integrating with a **corporate proxy** is one of the best ways to seamlessly implement the RSM Gateway into the current network system. This process may not be simple and implementation is varied, depending on individual corporate policy and network setup. To accommodate different situations, the RSM Gateway is quite flexible in network setup and options. Configuration should be accomplished by the Network Administrator. Where needed, GWAVA Retain Support should be consulted for information on configuring the RSM Gateway with the existing network system.

A **manual proxy** is a configured proxy set for each workstation. The proxy must be accepted with a security certification for each browser configured. To set the proxy, manually configure the proxy settings for each desired browser, and then install the security certificate to quiet the warnings from the browsers. To install the security certificate, browse to:

`http://<RSM-gateway-IP_Address>/noauth/cacert`

...and accept the certificate. This will complete the proxy configuration for the utilized browser.

The **Workstation agent** is the simplest option to ensure social media data capture on any installed workstation. The laptop client installs to any workstation, running either Windows or Mac OS X, and connects to the RSM Gateway as a proxy, regardless of whether the workstation is internal or external to the network. The Agent will not prohibit internet access if the RSM Gateway is unavailable, but will deliver the social media data to the RSM Gateway when it can connect. Making copies for mass distribution independent of the RSM Gateway can easily be accomplished; however, it is important to note that the workstation agent is hard coded to only communicate with the parent gateway. The workstation agent for any network must be obtained, at least initially, from the local RSM Gateway. The Workstation agent may be distributed via Zen Works or Microsoft SMS.

Installing the agent is a simple process of obtaining the install file, and then distributing or installing the agent across the network. No work or configuration of the agent is completed past install on individual workstations. All workstation agent configuration is located on the *Workstation agent | General* page in the RSM web interface. As shown below.

## Workstation agent Install

To obtain the install file for the workstation agent, open the RSM Gateway web interface and select the Workstation agent | General page, and scroll to the bottom of the page if necessary. This page also contains all configuration options for the Workstation agents connected to the system. All displayed settings are default.

The screenshot shows the Retain web interface. The left sidebar contains navigation options: Wizard, Home, Users & Groups, Administration, Reporting, Content Scanning, Workstation Agent (highlighted with a red arrow), Internet Auth, and Configuration. The Workstation Agent menu is expanded to show 'General' and 'Apply'. The main content area is titled 'General Settings' and contains a 'Settings' table with the following rows:

Settings	
Password for uninstallation... [ Click to set the password that will be required in order to uninstall the Workstation Agent. Note that clicking on this link will take you to a page which shows the password in plain text. ]	<a href="#">Edit...</a>
Perform HTTPS inspection? [ If yes, the Workstation Agent will intercept and inspect all HTTPS traffic to apply URL Filtering and Content Scanning policies ]	yes ▾
HTTPS inspection exclusions [ Remote and local hosts or networks to exclude from HTTPS inspection ]	<a href="#">Edit...</a>
Perform double HTTP inspection? [ If yes, the Retain for Social Media will inspect HTTP traffic that has already been inspected by the Workstation Agent. ]	no ▾
Perform double HTTPS inspection? [ If yes, the Retain for Social Media will inspect HTTPS traffic that has already been inspected by the Workstation Agent. This setting has no effect if HTTPS inspection is disabled on the Retain for Social Media. Recommended: no ]	no ▾
Force login? [ If yes, installations of the Workstation Agent will force the last user to login to create a new Internet Auth session. If a session already existed it will be replaced. Recommended: yes ]	yes ▾
Update Workstation Agent's automatically? [ If yes, installations of the Workstation Agent will update themselves automatically. Recommended: yes ]	yes ▾
Group inclusions [ Tick all groups that should be using the Workstation Agent. An alert will be sent if any users logged into these groups use the internet without the Workstation Agent installed. ]	<input type="checkbox"/> Admin <input type="checkbox"/> Default Group
IP exclusions [ IP addresses or ranges that are not required to use the Workstation Agent. Enter one item per line. ]	

At the bottom of the page, there is a 'Download' button (indicated by a red arrow) and a list of download links:

- Download the Workstation Agent for Windows (32 bit and 64 bit) [here](#).
- Download the Workstation Agent for Mac OS X [here](#).
- Download the uninstaller for the Workstation Agent for Mac OS X [here](#).

The links to the different versions are located at the bottom of the page. The Mac OS X agent requires a separate uninstaller.

The screenshot shows the 'Download' section of the Retain web interface. It contains the following links:

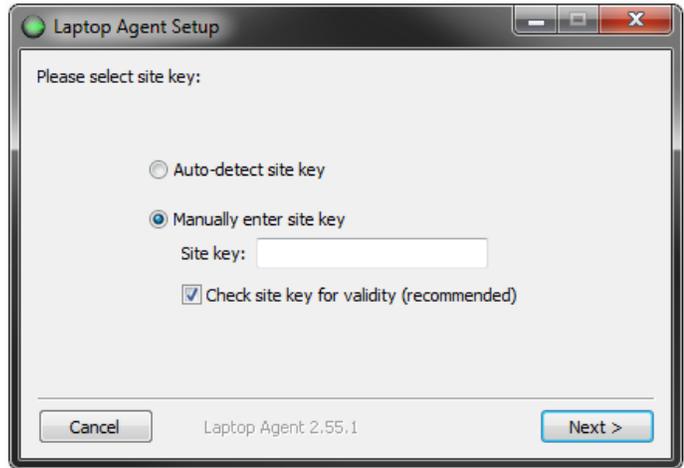
- Download the Laptop Agent for Windows (32 bit and 64 bit) [here](#).
- Download the Laptop Agent for Mac OS X [here](#).
- Download the uninstaller for the Laptop Agent for Mac OS X [here](#).

Download the appropriate file to the desired workstation(s)

Run the setup file on different computers as desired.

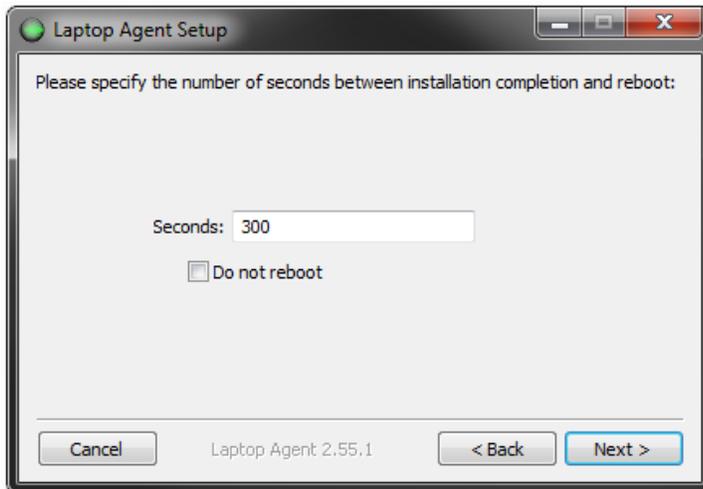
The Auto-detect site key option depends on many different network variables, and due to different variables, RSM Gateway network location, firewall, and NAT settings, the Auto-detect may not function.

It is best practice to manually enter the site key for the RSM Gateway.



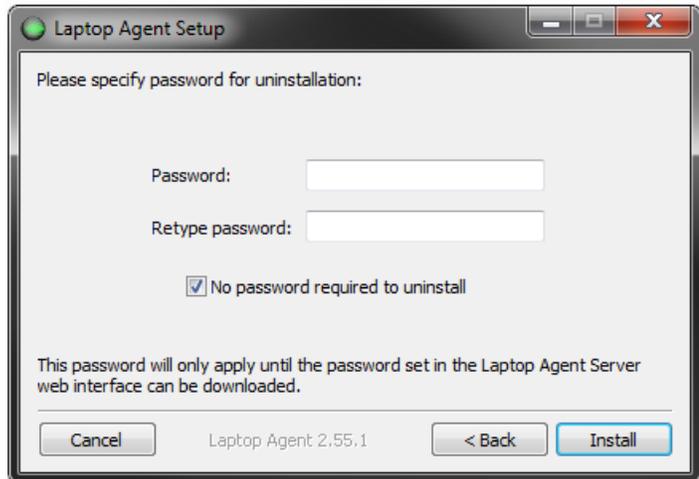
To ensure that the RSM Gateway is ready and can be contacted correctly, leave the 'check site key for validity' option checked.

The Site key is displayed on the appliance console and on the bottom left of the web administration page.

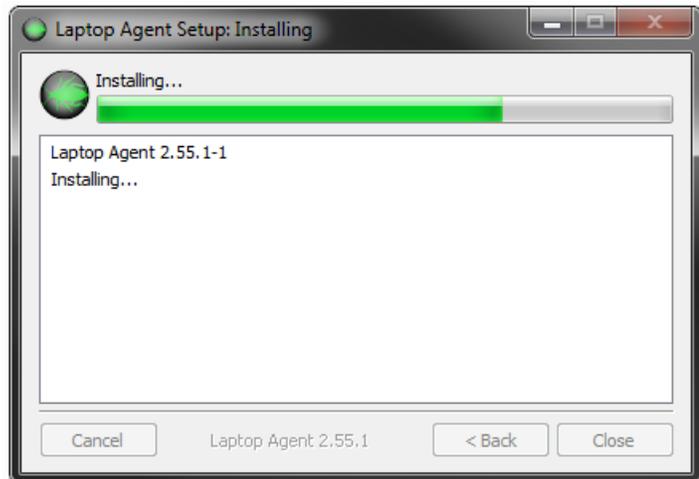


The Workstation agent requires a system restart to finalize the installation and initialize the connection in the network settings of the host computer. Set the desired time after installation completion and system reboot, or disable the reboot. Minimum setting is 60 seconds.

Requiring a password for uninstallation is an option to ensure the agent remains installed on the host computer, if corporate policy requires. The password specifically input here will be required for uninstallation ONLY if agent does not connect to the RSM Gateway. Once the agent connects to the RSM Gateway, the password specified in the Workstation agent configuration settings will be required to perform uninstallation. This password is only required if the host system never connects to the RSM Gateway.

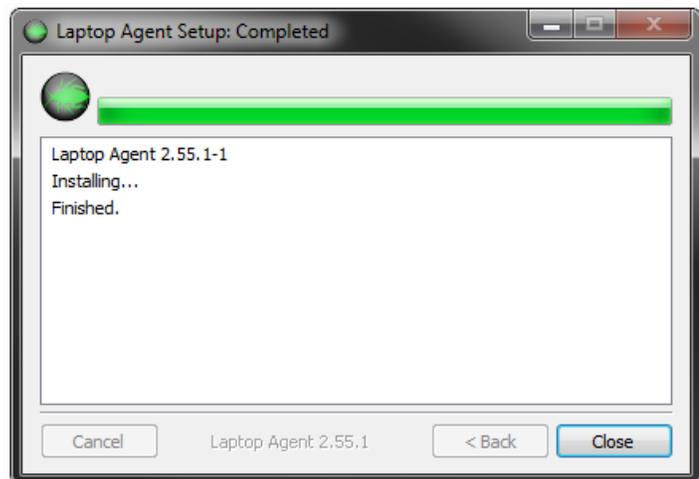


If the agent is installed without any requirement for a password to uninstall, then the system may uninstall the agent without any password, until the host system is restarted and the workstation agent connects to the RSM Gateway. Once communication has occurred, then the workstation agent will utilize the settings configured in the RSM Gateway.



Once the 'Install' button is selected, the install will begin.

Once the install has been completed, click 'close' to begin the countdown to reboot, if selected.



All configuration of the Workstation agent(s) connected to the RSM Gateway is completed through the RSM web console, on the Workstation agent | General page.

The only indication that the agent is active on a workstation is an icon in the system tray. The icon in the system tray is only a notification; there is no active interface or menu connected to the icon.