GWAVA Inc.

Retain for Social Media

Installation Guide

Contents

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.
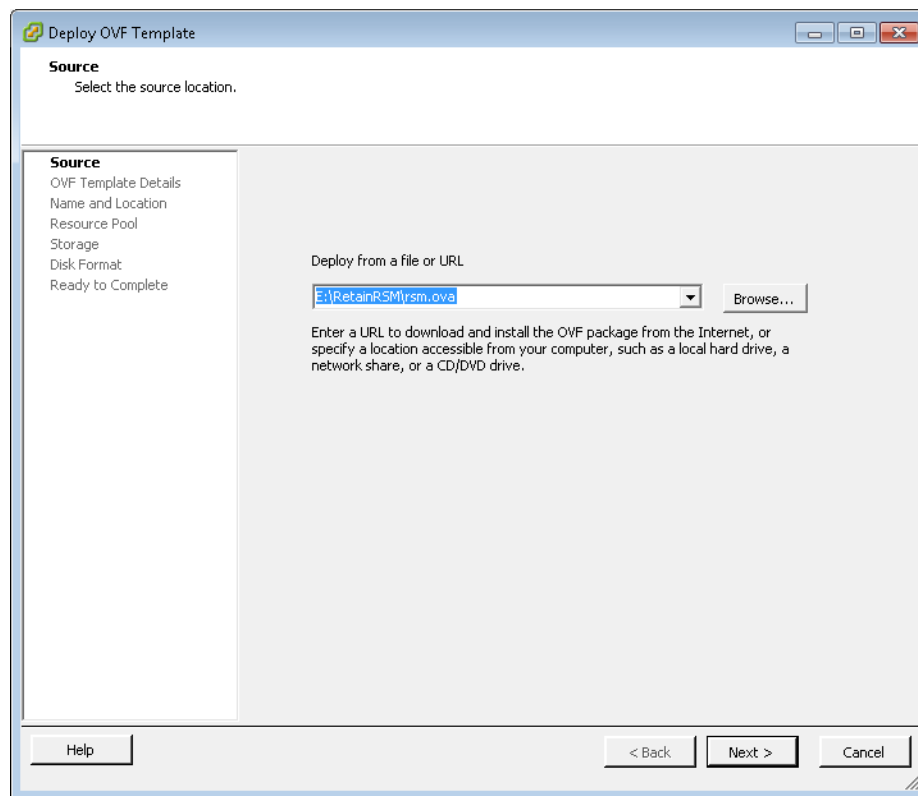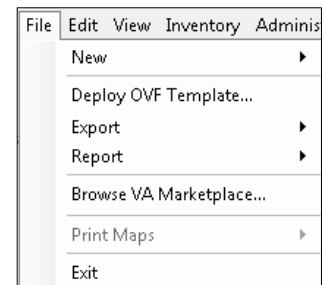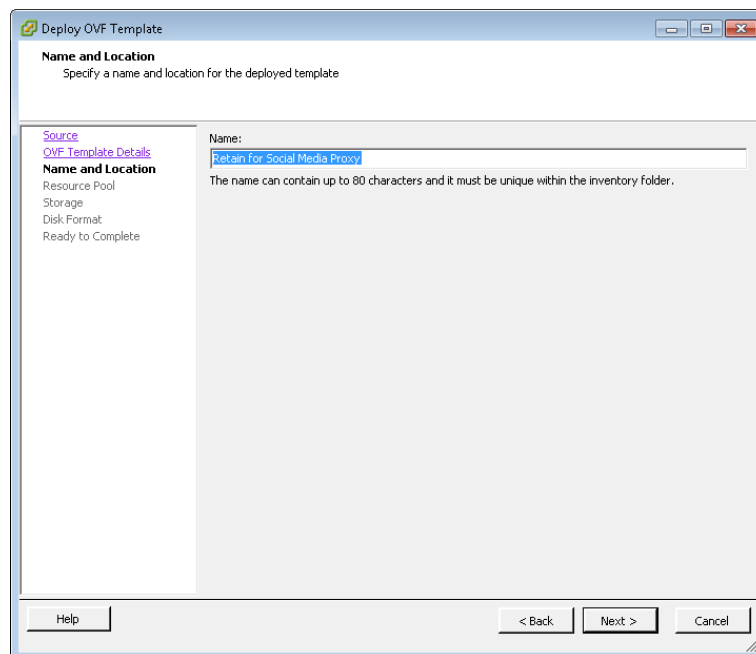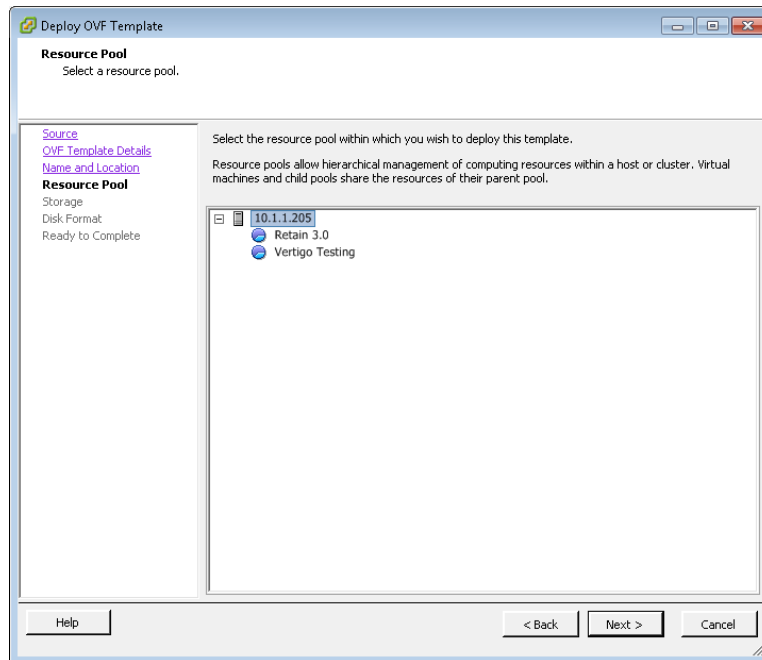
Follow the wizard.

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.
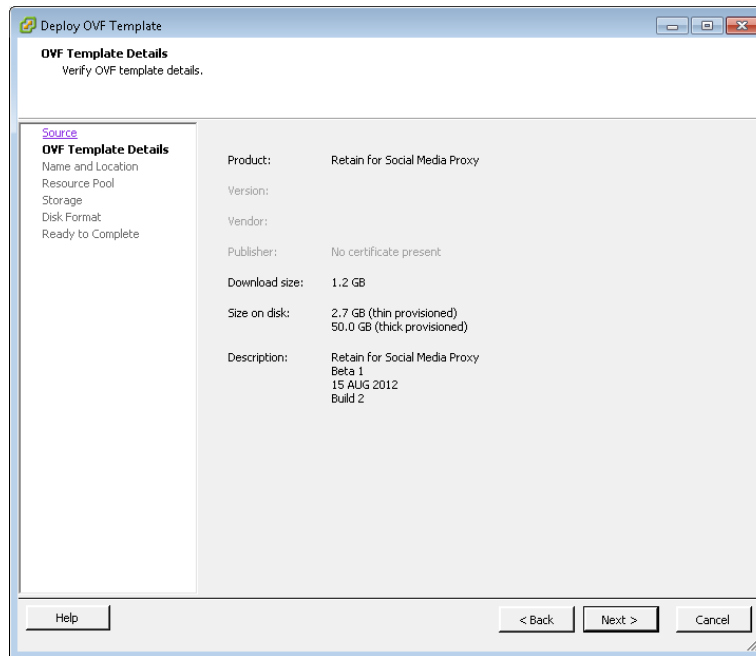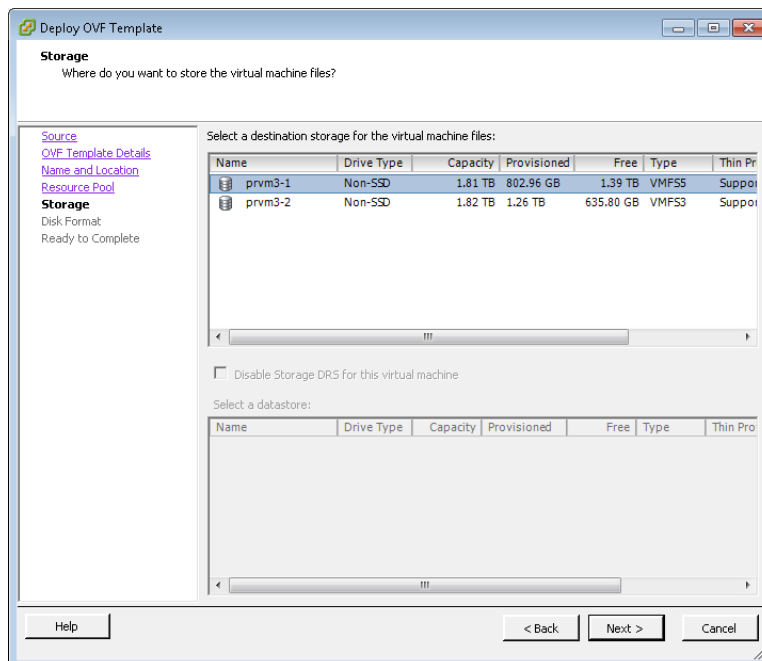

The name of the RSM appliance can be changed at will. Name the RSM deployment as desired and select 'Next'.

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'
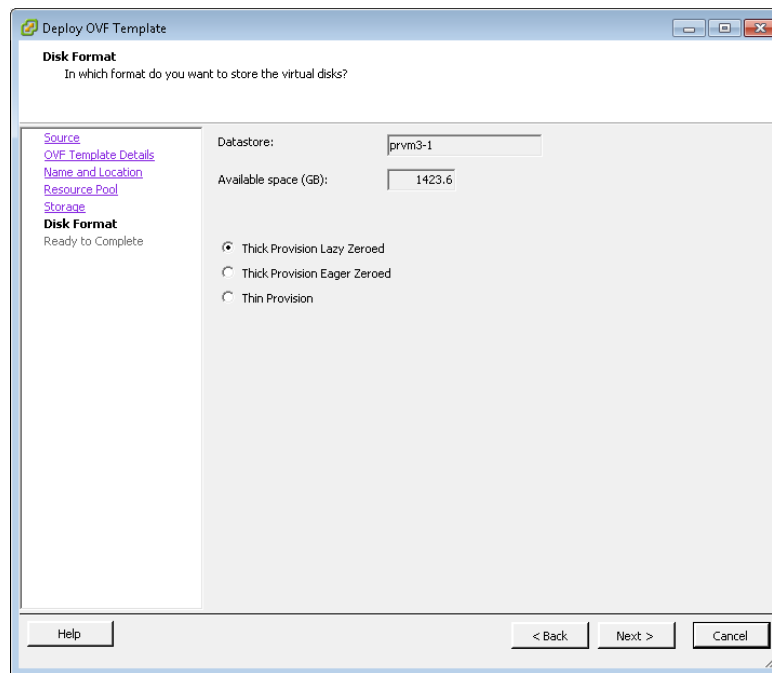

The overview displays settings. Ensure they are correct before moving on. Review the settings to ensure they are correct, then select 'Finish' to initiate the deployment.

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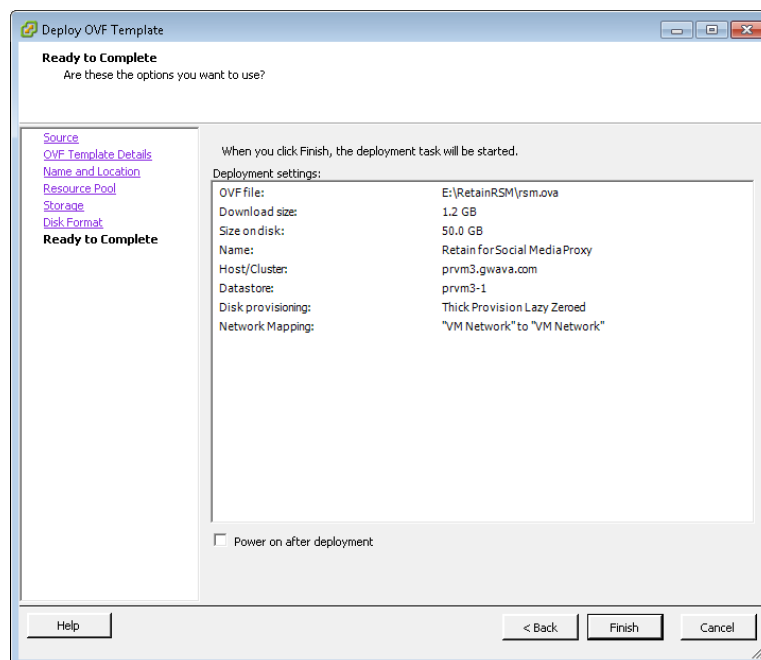
Wait for the RSM appliance to be created. The process may take several minutes depending on the speed of the network connection and the ESXi server.
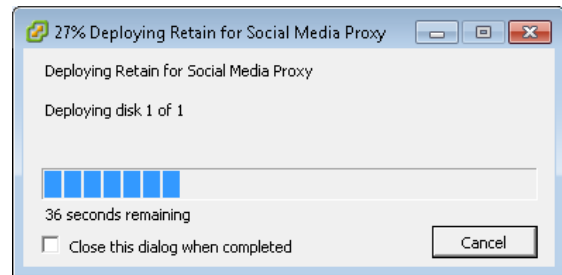
When the deployment is completed, click 'Close' and then return to the ESXi console. Select the RSM machine and start it up.
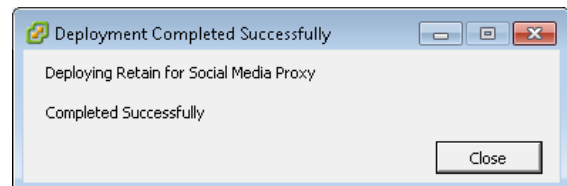
The RSM appliance will take several minutes to setup and start. Once the machine has completed the startup, you will see this page on the console:

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.
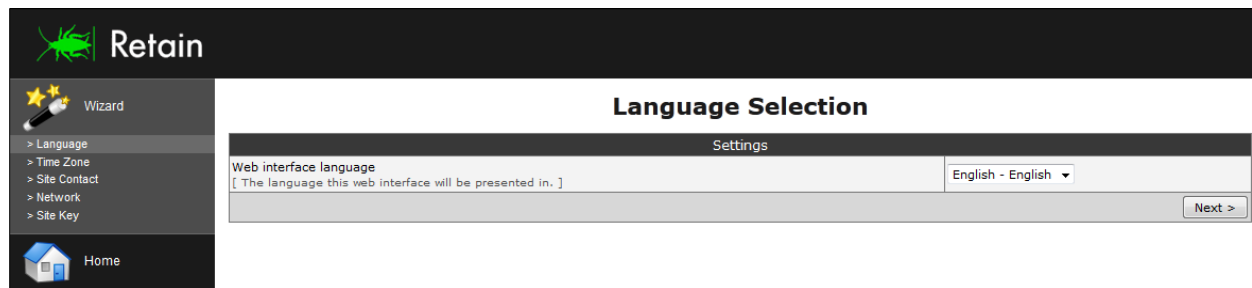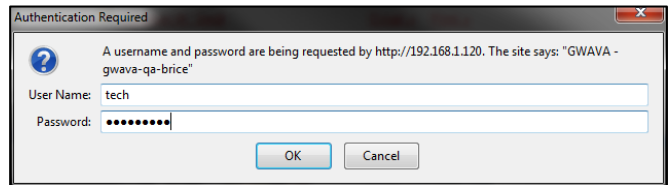
Ie. http://<server_IP>

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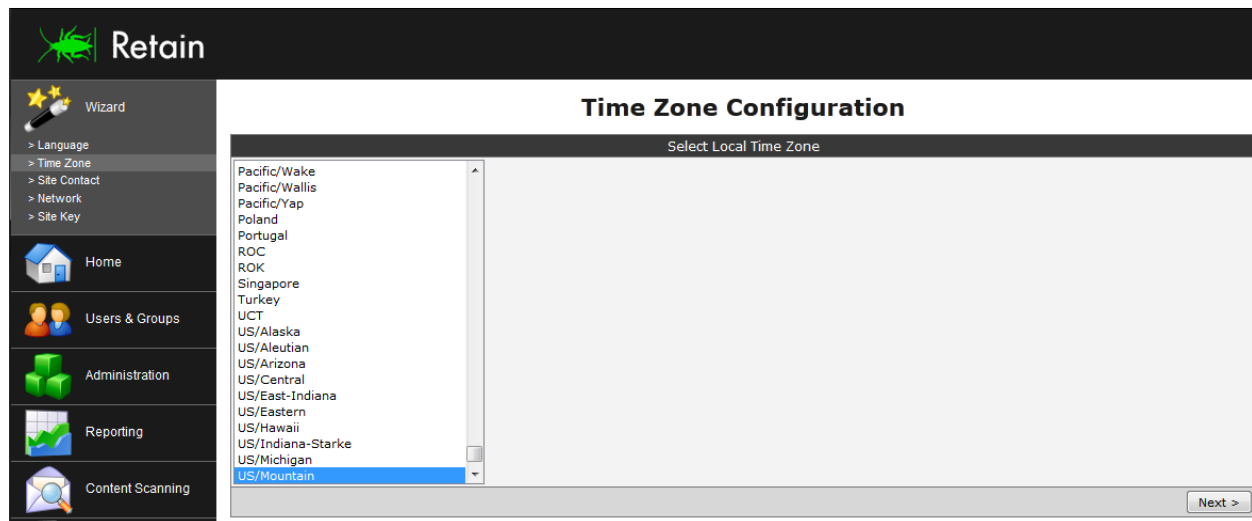
User: tech

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.

Site Contact Information

Alert Emails

Alert email address(es) [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]	bob@gwava.com
Link status alert address(es) [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]	bob@gwava.com

Site Contact Information

Organisation	GWAVA
Type of Organisation [The industry which best describes the organisation where the Retain for Social Media is installed]	Technology
Site contact (full name) [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]	GWAVA Man
Position/Authority [The position/authority of the above contact person within the organisation.]	Sitting
Phone number [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]	1800-go-gwava
Mobile phone number for critical SMS alerts [A phone number for sending critical SMS alerts concerning problems or serivvce interruptions of the Retain for Social Media or the services it provides. e.g. +61 4 0123 4567]	
Site address [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]	**Address Line 1** 100 Alexis Nihon e.g. Level 1/888 Brunswick Street **Address Line 2** Suite 500 (optional) **Suburb / City** Montreal e.g. New Farm **State** QC **Postcode/Zip** H4M 2P1 e.g. Queensland e.g. 4005 **Country** Canada e.g. Australia
Email address [An email address for the above contact person at the site where the Retain for Social Media is installed.]	bob@gwava.com

Technical Contact Information

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

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.

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.
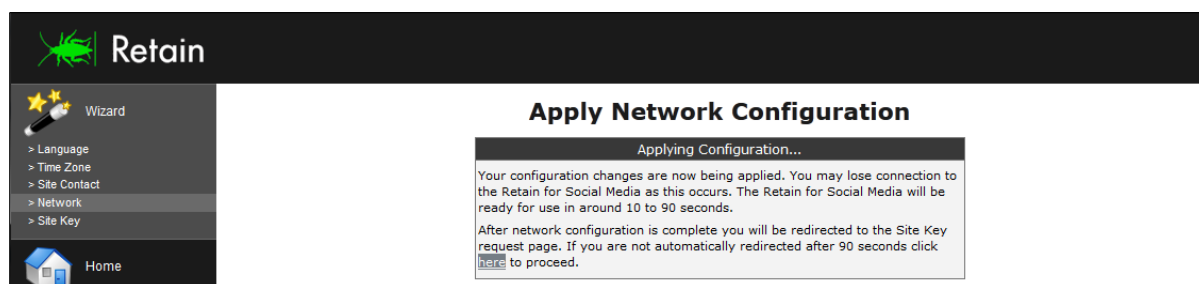
The Description simply describes the implementation of the RSM Gateway.

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.

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'.

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.

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.

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

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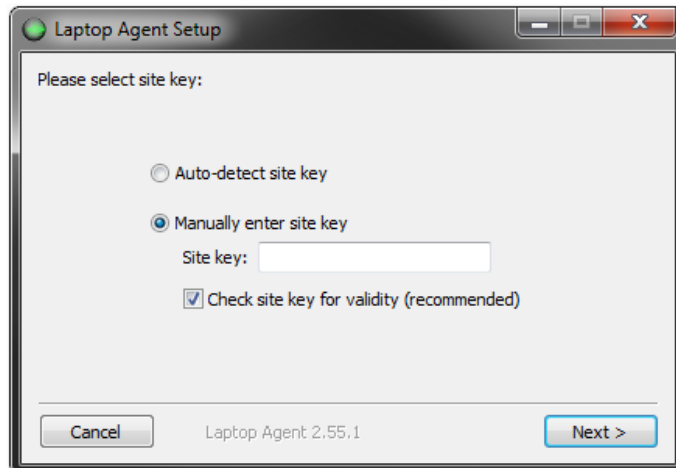
To ensure that the RSM Gateway is ready and can be contacted correctly, leave the 'check site key for validity' option checked.

The Site key is displayed on the appliance console and on the bottom left of the web administration page.
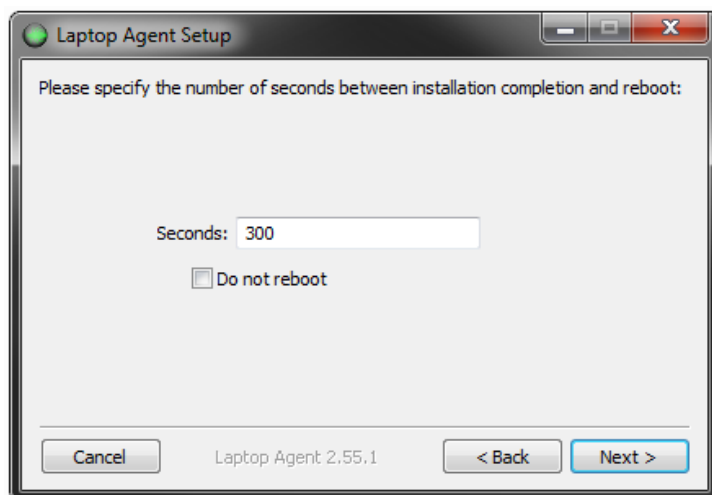
The Workstation agent requires a system restart to finalize the installation and initialize the connection in the network settings of the host computer. Set the desired time after installation completion and system reboot, or disable the reboot. Minimum setting is 60 seconds.

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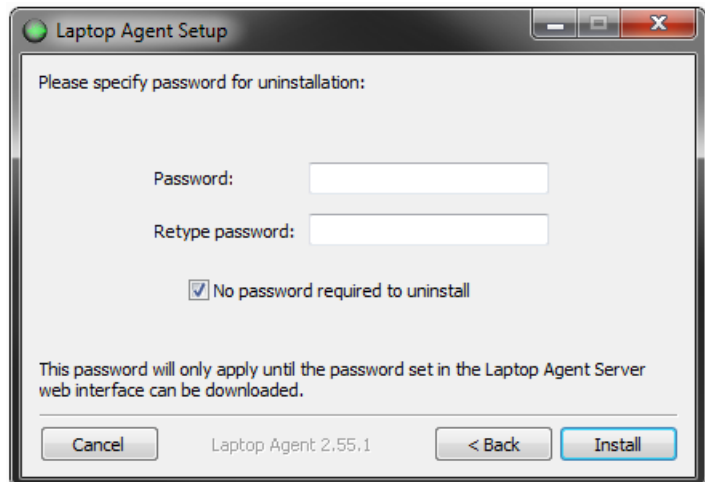
If the agent is installed without any requirement for a password to uninstall, then the system may uninstall the agent without any password, until the host system is restarted and the workstation agent connects to the RSM Gateway. Once communication has occurred, then the workstation agent will utilize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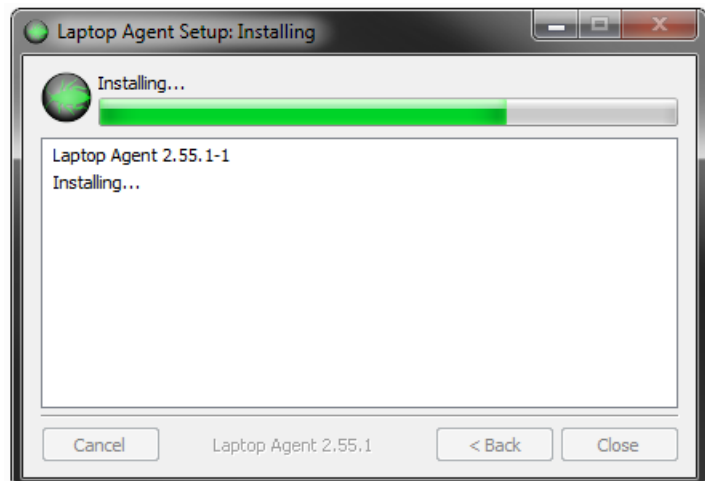
Once the 'Install' button is selected, the install will begin.

Once the install has been completed, click 'close' to begin the countdown to reboot, if selected.
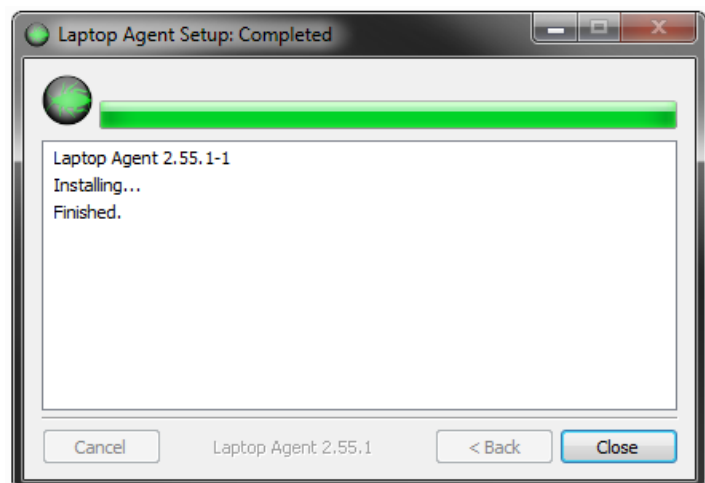
All configuration of the Workstation agent(s) connected to the RSM Gateway is completed through the RSM web console, on the Workstation agent | General page.

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.