CLEARSWIFT
ADAPTIVE CYBER PROTECTION

Clearswift Information Governance Server Installation & Getting Started Guide

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Contents

About this guide

The Clearswift Information Governance (IG Server) enables your organisation to identify important information, and monitor and control the flow of this information within your organisational boundary and beyond.

The IG Server, along with other Clearswift products, provides the basis for the Clearswift *Information Governance Platform* (IG platform). Collectively, the IG platform allows you to register, control, and track content. The IG platform comprises the following:

- The Information Governance Server

- One or more Clearswift SECURE (Web, Email, Exchange, or ICAP) Gateways

This guide provides information on how to install your IG Server onto a virtual or physical machine.

This guide does not provide instructions on installing a Clearswift SECURE Gateway. You should consult documentation provided with your Gateway product for information on Gateway installation.

1.1 Who is this guide for?

This guide is provided for the administrator who is tasked with installing an IG Server. Some steps of this installation procedure are performed from a Linux command line, and it is assumed that the person who installs this software has some experience of Linux administration.

1. Before installing

This section includes considerations you need to make before installing your Clearswift Information Governance Server.

1.1 Types of installation and hardware prerequisites

You can install your IG Server on:

- A dedicated physical server

- A VMware vSphere or ESX/ESXi machine

Storage requirements will depend on the number of users registering items on the IG Server and general Gateway udage. In addition to storage requirements, you should ensure that a minimum of 32 GB of RAM is available and, if you are using a virtual machine, 2 vCPU.

The table below provides guidance on some typical scenarios and the amount of disk space required.

Scenario	Approximate disk space consumed
Registration of 500,000 average sized documents (10,000 words per document).	40 GB
Storage of 1 year's worth of tracking data from an Email Gateway for a company of 500 users	7.5 GB
Storage of 1 year's worth of tracking data from an Email Gateway for a company of 5000 users	68 GB
Storage of 1 year's worth of tracking data from a Web Gateway for a company of 500 users	76 GB
Storage of 1 year's worth of tracking data from a Web Gateway for a company of 5000 users	7.5 TB
Storage of 7 years worth of tracking data from a Web Gateway for a company of 5000 users	52.5 TB

Depending on your organization's requirements these numbers might differ, and you should consider data retention periods and archiving processes when determining hardware resources.

Browser support

The following browsers and versions are supported:

- Internet Explorer 9 and 10

- Mozilla Firefox 10,17, and 24

- Google Chrome 18

1.1.1 Online and offline installation

You can install your IG Server in online or offline mode. Installing online is the easiest and most efficient method but requires Internet connectivity.

If you need to install offline please contact Clearswift Support.

2. Installing

Installation of your IG Server is a two step process. You need to:

1. Install Ubuntu Server

2. Install Clearswift IG Server

The installation process uses a Clearswift 'pre-seed' file that provides default disk partition and other configuration settings. The pre-seed file is hosted at the Clearswift repository and needs to be specified as part of the boot options when installing Ubuntu.

> To complete your IG Server installation, you need a valid Clearswift IG Server license key.
> You do not need a license key to install Ubuntu Server.

2.1 Install Ubuntu server

Before installing Ubuntu server you need to:

- Download Ubuntu 12.04.03 Server ISO. If you are hosting your IG Server on a physical machine you will need to burn the ISO to a CD.

- Have access to the Internet if you are installing in online mode, and be able to resolve *repo.clearswift.net*. If you need to allow access through a firewall, the static IP address is **46.51.174.180**.

To install Ubuntu server:

1. If you are installing on a physical server, insert the CD into the drive and power-on the server.

    If you are installing on a VM, either insert the CD into the drive or make the ISO file available to the VM, and configure the installation media option accordingly.

    The Ubuntu splash screen is displayed.

2. Display the Boot Options. To do this, press **F6** followed by the **Esc** key.

    The Boot Options are displayed.

3. Edit the **file** parameter. If you are in offline mode, enter the location of the pre-seed file. If you are in online mode, replace the **file** parameter with the following:

    ```
    url=http://repo.clearswift.net/igp/server.seed
    ```
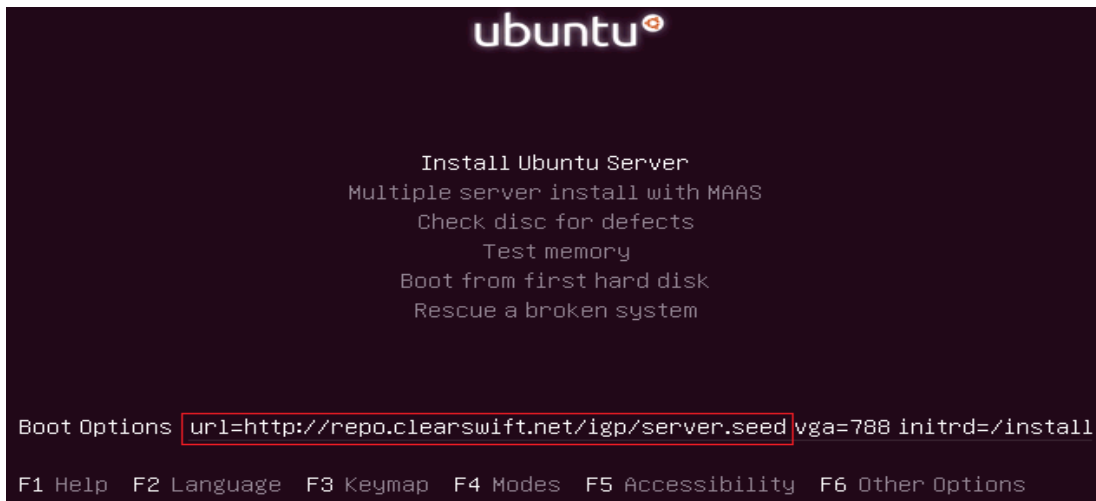
4. Press **Enter**

    The installation will begin.

During installation you will be prompted to supply the following:

- Language

- Location

- Keyboard layout

- Time zone

- Hostname proxy server (optional)

Network configuration

The installation will attempt network configuration using a DHCP IP address by default. If there is no DHCP server available or if you want to configure a static IP address, take the following steps when the **Configure the network** dialog is displayed during the installation process:

1. Use the Tab key to select **Go Back**.

2. Select **Configure network manually** and complete the on-screen instructions.

Disk partitioning and formatting

The installation process will allocate disk partitioning and formatting with an assumption of a single disk configuration. Details of the allocation are displayed to screen and require acceptance before the installation proceeds.

> If you are using a single disk configuration, we recommend that you accept the default partitioning values.
>
> If you are using a multiple disk configuration or are unsure about the default configuration, please contact Clearswift Support.

After the installation is complete, your server will reboot and display the GRUB menu. Select the Ubuntu non-recovery mode option. A terminal window with a log in prompt will be displayed.

> The installation will create a user account of:
>
> - user: **cs-admin**
>
> - password: **password**
>
> We strongly recommend that you change this password after the Ubuntu and IG Server installation process has completed.

After the Ubuntu installation has completed you should perform a full Ubuntu upgrade and server reboot to ensure that your base Ubuntu installation is up to date.

To do this, from the command line type the following:

```
sudo apt-get update
```

```
sudo apt-get dist-upgrade
```

```
sudo reboot
```

A list of update packages is displayed as they are retrieved.

2.2 Install IG server

The following steps describe how you install your IG Server.

> If you are using a VM for your installation, we recommend that you take a snapshot before installing your IG Server

To install your IG Server:

1. From the Ubuntu command line, type the following:

   ```
   sudo apt-get install ig-server
   ```

   Progress of the installation is displayed on the screen

2. When the installation is complete, reboot your server. From the command line, type the following:

   ```
   sudo reboot
   ```

   The server will reboot and display the GRUB menu. Select the Ubuntu non-recovery mode option. A terminal window with a log in prompt will be displayed.

3. Log in using the **cs-admin** account.

   The Clearswift Server Console is displayed.

4. Select **View System Status** and make a note of the **IP address**.

5. Change the **cs-admin** password.

   Select **Configure System** > **Reset Administrator Password** and follow the prompts to change the password.

   > ⚠️ Do not forget the cs-admin password as console and command-line access require it. Consider recording it in a secure place in accordance with your organization's policy.

2.2.1 Complete IG Server installation

To complete the installation, you need to provide a valid Clearswift IG Server license key and configure IG Server settings from the IG Server Installation wizard.

> Before you start the installation wizard, you need to make sure the following firewall ports are open to allow IG Server to domain controller communication:
>
> - 3268
>
> - 3269 if using SSL

To start the installation wizard:

1. Open a web browser and go to the IP address as noted from **View System Status**.

   ```
   https://<ip address>
   ```

   The welcome page for the IG Server wizard is displayed.

2. Start the wizard. Provide your IG Server license key and apply configuration settings as appropriate for your installation. Settings can be changed after the installation process is complete from the IG Server Administrator user interface.

3. Click **Finish** to complete the installation wizard.

Your IG Server installation is now complete.

2.2.2 After installation

Log in to the IG Server Administrator user interface, click **Help** on the toolbar, and read *First Steps* in the *Get Started* section. This topic describes key features of your IG Server and directs you to help on configuring Gateway to IG Server communication and working with Gateway rules to discover and report on matches with registered content.