

Intro – Make Customer the WebEx presenter, Ask questions about how much they have set up already and what they want to see, Appliance setup inside their network (Inside Firewall)

1. Manually Give NS an IP address, plug in keyboard and monitor, “1” is Configure IP Address, 0 back out of the system
2. NetAuditor – Install NetAuditor on a Server or VM via **Utilities** section, When asked select **NO**, Create a Syslog Server, **Device Settings -> Logging** enable Syslog, enter IP, set TCP, and enable Timestamp. Ensure NA is collecting
3. LDAP – **Device Settings -> LDAP Sources [Add]** – Name, LDAP type, NetBIOS Domain, IP or Hostname, Login & Password for a guest account, Search Base terms (Ex. Dc=telemate, dc=net), Hostname – DNS Server(**Device Settings -> Network**), Windows NTLM (**Device Settings -> Advanced [Join]**)
4. Groups – Exempt and Public, **Add** a new group, YouTube|Schools, Block Override, Abuse Setting
5. Filter Settings -> Advanced, Enable Browser Protection
6. Group Policy – Save To, Grid, Safe Search, Categories
7. Updates -> Enable Automatic Update – Micro Updates – Every 10 Minutes
8. Overrides – Import/Export, Categories, Start/End time, Reference Depth, System Group
9. Users – LDAP populated
10. Managers – Security Levels
11. Utilities – Logon Agent, Remote Agent – Internal and External IP Addresses & Port 3001
12. Portals - Filter Settings -> Authentication, Zone based, LDAP vs NTLM, Mobile Compatible Portal w/ Pairing
13. Reporting – On the box reports, Search engine
14. Configure Reports – Frequency, Customization, Filters, Speed, Storage Size and Pruning
15. Security Manager – Sync from NetSpective, Tailor manager to see & run only what they want
16. Monitors – Add new line, Filtering, Alarm features, delivery
17. Follow Up with the Customer – Set a time to follow up with the customer and Email them your contact information, offering them to send you feedback and questions anytime.