

**Clearswift Information Governance Server
Installation & Getting Started Guide
Version 2.0.0**

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1. About this guide

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

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

The IGP comprises the following:

- The Information Governance Server
- One or more Clearswift SECURE Gateways (Web, Email, Exchange, or ICAP)

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.

We recommend that you read through this guide before installing your IG Server.

2. Before installing

This section includes considerations you need to make before installing your IG Server.

2.1 Types of installation and hardware prerequisites

You can install your IG Server on:

- A dedicated physical server
- A VMware system, such as vSphere or ESXi

Storage requirements depend on the number of users registering items on the IG Server and general Gateway usage. 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, a minimum 2 vCPU. 2 vCPU is the minimum recommended, but 4 vCPU is preferable, and for larger systems, 8 vCPU with dual processors.

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 a Clearswift Secure Email or Exchange Gateway for a company of 500 users	7.5 GB
Storage of 1 year's worth of tracking data from a Clearswift Secure Email or Exchange Gateway for a company of 5000 users	68 GB
Storage of 1 year's worth of tracking data from a Clearswift Secure Web or ICAP Gateway for a company of 500 users	76 GB
Storage of 1 year's worth of tracking data from a Clearswift Secure Web or ICAP Gateway for a company of 5000 users	7.5 TB
Storage of 7 year's worth of tracking data from a Clearswift Secure Web or ICAP 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.

2.1.1 Browser support

The following browsers and versions are supported:

- Internet Explorer IE11 (Windows 7, Windows 8)
- Mozilla Firefox - latest

- Google Chrome - latest
- Microsoft Edge (Windows 10)
- Apple Safari 12.0.3

3. Installing

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

1. Install Red Hat Enterprise Linux 7.x.
2. Install Clearswift IG Server.



You need Internet access to install the IG Server. To complete your IG Server installation, you need a valid Clearswift IG Server license key.

You do not need a license key to install Red Hat Enterprise Linux 7.x. However, the computer must be on a network with a DHCP server in order to download the `kickstart.cfg` file for installation.

We recommend that before you start the installation process, you fill in the form in [Appendix B: Installation settings form](#). This will speed up your installation and ensure you have all the correct details to hand before you begin.

3.1 Install Red Hat Enterprise Linux 7.x Server

The following steps guide you through the process of installing the Red Hat Server that will host your IG Server software.

1. Download the latest Red Hat Enterprise Linux 7.x Server ISO from the Red Hat web site: <https://access.redhat.com/downloads>.
2. Boot your server from the ISO to display the main installation menu.
3. Select **Test this media & install Red Hat Enterprise Linux 7.x**.
4. Press **TAB** and add the following path to the kickstart file boot options:

```
inst.ks=http://repo.clearswift.net/rhel7/igp/kickstart.cfg
```
5. Press **ENTER** to continue with the installation wizard.
6. At the Red Hat splash screen, enter the language you want to use for the installation wizard.
7. From the Installation Summary screen, configure the following:
 - Date and Time
 - Keyboard
 - System Language
 - Network & Host Name
8. Click **Begin Installation**.

9. While the server is installing, click **User Creation** to create a new user account with administrator privileges.



Ensure that you create the administrator account at this time, as you won't have the opportunity to do it at a later stage. If you don't create an administrator account at this point, you will need to start the process again in order to do so.

10. Allow the installation to continue until it has completed.



If there is only one configured system administrator and the unsuccessful login attempt limit is exceeded, the system administrator account will be locked.

If this occurs, the only solution available is to force a reboot of the system, which will unlock the account.

Clearswift recommends that you create a second system administrator account, which can be used to recover the locked account instead. See [Appendix C: Administrator accounts](#) for more information.

3.2 Install the Information Governance Server (IG Server)

You are now ready to install the IG Server software using the steps below.

1. Log in to the server using the administrative account you created.
2. Update the server:

```
sudo yum update
```
3. Install the IG Server software:

```
sudo yum install cs-igp
```
4. Reboot the system for the changes to take effect:

```
sudo reboot
```

3.2.1 Complete IG Server installation

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



Before you start the installation wizard, you need to make sure



that the following firewall ports are open to allow the domain controller to accept requests from the IG Server:

- 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.



If you are installing behind a proxy, please refer to [Appendix A: Using a proxy](#).



As part of your IG Server configuration, you have to supply directory server account credentials. It is possible to lock all users out of the IG Server Administrator user interface if the account expires or there is a password change.

What can I do?

You should create a service account for this purpose and set password expiry to **disabled**.

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

3.2.2 After IG Server installation

Log in to the IG Server Administrator user interface and click **Help** on the toolbar.

We recommend that you read:

- [First Steps](#) in the Get started section.
- [Known issues](#)

Appendix A: Using a proxy

Configuring a proxy post-installation

The following steps describe how you can configure your IG Server to work behind a proxy.

1. Install Red Hat Enterprise Linux 7.x by following the steps in section 3.1 of this **Installation & Getting Started Guide**.
2. After Red Hat Enterprise Linux 7.x is installed, log on to the terminal using the administrator account you created in section 3.1 step 9 and run the following command:

```
sudo vi /etc/environment
```

3. Add or edit the following four lines:

```
http_proxy=http://<proxy server address>:<proxy server  
port>/  
https_proxy=https://<proxy server address>:<proxy server  
port>/  
HTTP_PROXY=http://<proxy server address>:<proxy server  
port>/  
HTTPS_PROXY=https://<proxy server address>:<proxy server  
port>/
```



If you are working through an authenticating proxy, you must provide the local proxy in the following format:

```
http://<username>:<password>@<proxy server  
address>:<proxy server port>/
```

4. Restart network services by running the following command:

```
sudo systemctl restart network
```

5. Install the IG Server by following the steps in section 3.2 of this **Installation & Getting Started Guide**.

Appendix B: Installation settings form

Before you start the installation process, it is recommended that you complete the following form.

Items required for initial installation of the Red Hat operating system

Network details:

	Value
Server hostname and/or IPv4 address	
Network mask	
Gateway IPv4 address	
DNS Server hostname and/or IPv4 address	

System administrator details:

	Value
System administrator name	
System administrator password	
Recovery system administrator name	
Recovery system administrator password	

Items required in the browser wizard

IG Server license details:

	Value
Company Name	
License key	
Serial number	

Directory Server details:

	Value
Directory Server hostname and/or IPv4 address	

Fully Qualified Domain Name (FQDN)	
NetBIOS domain name	
Directory Server communications service account name	
Directory Server communications service account password	

Mail Server:

	Value
The name or address of the corporate mail server that the IG Server uses to send emails	
The email address the IG Server uses as the 'sent from' address when sending emails	

Administration:

	Value
The domain user who will be the system administrator	
The password for the domain user who will be the system administrator	

Appendix C: Administrator accounts

The Linux Pluggable Authentication Modules (PAM) rules, which are applied by the security profile during installation, lock a user account after making several incorrect password entry attempts.

If there is only one configured system administrator and the limit is exceeded, the system administrator account will be locked. Clearswift recommends that you create a second system administrator account that can recover locked accounts.

To create additional administrator accounts, follow the steps below:

1. Log in as a user with administrator permissions:

```
sudo su
```

2. Create the new user and add it to a group of users with administrator privileges:

```
useradd --groups wheel <username>
```

3. Set the password for the new user:

```
passwd <username>
```

4. If an account requires unlocking, it is possible to log in with this new account and use the *faillock* utility to recover the locked account.

If you want to check the authentication failure records use the following command:

```
sudo faillock --user <username>
```



If you want to reset the authentication failure records use the following command:

```
sudo faillock --user <username> --reset
```

Appendix D: Troubleshooting

The installation hangs before the Red Hat splash screen is displayed

This error occurs if the Red Hat Enterprise Linux 7.x installer cannot download the `kickstart.cfg` file from <http://repo.clearswift.net/rhel7/igp/>. First check that the server is on the same network as a DHCP server, and can access the internet. If it is and the installation still hangs, we recommend that you download the `kickstart.cfg` file to a web server on your local network that your Red Hat Enterprise Linux 7.x installer can access.

Please ensure that you maintain the Linux line ending format for the installer to process the file. Clearswift recommends you follow the steps:

1. Open a browser with access to the Internet and navigate to <http://repo.clearswift.net/rhel7/igp/>.
2. Right click on the `kickstart.cfg` link and select **Save link/target as...**
3. Save the file as `kickstart.cfg` and then copy it to a web server on your local network.
4. Check that you can access the file in a browser. Example:
<http://mylocal.server/path/to/kickstart.cfg>
5. Return to section 3.1 ([Install Red Hat Enterprise Linux 7.x Server](#)) and begin the install process again. Enter the new location of the `kickstart.cfg` file when you edit the file parameter.

Error setting up base repository

On some systems, particularly when using VMware, the installation wizard reports **"Error setting up base repository"**.

This is a known Red Hat issue (<https://access.redhat.com/solutions/976603>). Click the warning triangle, then click **Done** on the installation media selection page.

Failed to validate license

This error can occur when you are running the IG Server installation wizard.

If no previous errors have occurred until now, this error might be the result of a missing HTTPS proxy or firewall configuration. We recommend you carefully perform the steps listed in [Configuring a proxy post-installation](#) above.