

## Getting Started Guide for SurfPass v5

The same software is installed on the server computer, administration computer and clients. This is the server address configuration parameter (localhost or IP address of the server) that determines the role. If a previous version SurfPass is already installed, you must uninstall it before installing version 5.

### Installing the server

- The computer must be running Windows 7, 2008 R2, Vista, 2008, 2003, XP. This is not necessarily a "true" server in the Windows server meaning.
- The framework. Net 3.5 must be installed (if not error when downloading lists). Link at the download page SurfPass or by optional Windows updates. Build in Windows 7 / 2008 R2 but not activated by default in 2008 R2.
- The server computer may be the same as the administration computer or a client.
- SurfPass is compatible with servers TSE / Citrix.
- TCP ports 3050 and 5030 must be open on this computer.
- A static IP address is preferable to a DHCP address.
- The server address should be left as "localhost". This is the only computer to have the server address "localhost".

### Installation of the administration computer

- The computer must be running Windows 7, 2008 R2, Vista, 2008, 2003, XP.
- The framework. Net 3.5 must be installed (if not error when launching the administration console). Link at the download page SurfPass or by optional Windows updates. Build in Windows 7 / 2008 R2 but not activated by default in 2008 R2.
- The administration computer may be the same as the server or a client.

### Installation of the clients

- The computer must be running Windows 7, 2008 R2, Vista, 2008, 2003, XP.
- A static IP address is preferable to a DHCP address.
- The only parameter to specify during the setup is the server's IP address, instead of "localhost".
- The deployment of clients can be done automatically by GPO (see the user manual).

### First use of the administration console

Start menu / All Programs / Cogilab / SurfPass5 / SPAdmin from the Windows session used for the installation of SurfPass. The login is "admin" and password "Cogilab". By default all passwords in the administration are "cogilab".

### General structure of the administration

- Whenever a form is changed, press the green button «Apply» at the top to save the changes.
- Users belong to groups of users whose rights are defined by a user profile. Same thing for the computers.
- The computer profile is active when the computer is idle; there is no SurfPass user connected. Otherwise, the profile of the user currently logged applies. The user profiles and computers profiles are mutually exclusive, only one is active at a time, including the filtering rules.
- The settings in the "Global" tab are shared by the entire system. For example, if a filtering list is disabled in Global / Filtering lists / Lists editing, it will also be disabled in all profiles that use it, even if the related rules are

still active.

- The filtering rules, filtering lists, lists of authorized applications and automatic starts appearing on a white background when they are activated and on a gray background when they are disabled.

### **Manual or automatic users identification**

By default, SurfPass synchronizes its accounts with those of Windows users, as well as with local accounts, which is adapted for example to businesses and schools because it avoids a second identification in SurfPass. For computers use for public access, a manual identification is sometimes preferable: in this case, you must go on the tab "Computers profiles" / "generic" / "General" tab and then disable "Identification with Winlogon", and activate the display option "Always show identification box in idle." Save the changes by pressing the green button «Apply» at the top.

### **Changing the filtering level**

Each user profile has a tab "filtering", containing a field "level of content analysis filtering". The default level of 5/10 corresponds to a child of 12 years. Rise to 7-8 for young children or lower to 1-3 for adults. This change is to be done for each user profile in used.

### **Filtering by blacklist or whitelist**

By default the filtering operates in blacklist mode: everything is permitted except what is expressly prohibited by rules of simple addresses or addresses lists. To get the operation in whitelist mode (all is prohibited except what is explicitly permitted), go to the tab "Filtering" of the corresponding user profile and uncheck the first check box: "All connections are allowed (except for rules)" and confirm with the button «Apply». Then add authorization rules.

### **Filtering video sites, social networking...**

For sites like YouTube or Dailymotion, simply activate the audio-video or filehosting lists. Facebook and Myspace are in the social\_networks list. Enabling or disabling of a list is in the tab "Global" / "Filtering lists" / "Lists editing". It is advisable to not display the blocking with rules using the audio-video and filehosting lists, otherwise any valid web page containing for example a video will display a blocking popup.

### **Internet access through a proxy**

If browsers use a Web proxy server, it must be declared in SurfPass: Computers profiles / generic / Proxy tab, then button "Add". Otherwise filtering and log will not be effective. If the SurfPass server downloads lists through a proxy, it must be declared in Global / Filtering lists / Download proxy.

### **Enter the serial numbers**

Except for evaluation period, serial numbers must be entered within 30 days after the installation:

- Cases of a site license: Tab "Global" / "General". Save the change with «Apply».
- Cases of per computer licenses: Tab "Computers": selection of the computer on the left, enter the serial number in the form on the right, save the change with «Apply». Serial numbers must be distinct for each computer.

### **Changing default passwords**

By default, all passwords are "cogilab". For security issue, a change is required for:

- Admin account
- Credit account
- The users accounts test, test1 and test2 which may be deleted.