



Chaperon 2004/06
Installation for ISA 2004/06 Enterprise Edition

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1. Minimum System Requirements for Chaperon*

- Microsoft Windows Server 2000 or 2003.
- Microsoft Internet Security and Acceleration Server 2004 or 2006 Enterprise Edition.
 - **Note:** Chaperon must only be installed after ISA Server has been installed.
- 1.5GHz or higher CPU.
- 1.0GB of RAM.
- 450MB free hard disk space for setup file and installation.
- Enterprise Edition capability requires Chaperon build 196 or later for ISA 2004 or Chaperon build 200 or later for ISA 2006.

*Actual system requirements will vary based on your deployment configuration and expected load.

2. ISA Post Install, Chaperon Pre Install Checklist

- Ensure that Internet access is available from the ISA Server.
- The allow rule for users that are to be filtered by Chaperon should be present at the array level and not the enterprise level. If the allow rule is present at the enterprise level, it will be processed before Chaperon's deny rules that will be placed into the array level, and no filtering will occur.
- When using two NICs (highly recommended), only the external NIC should have a default gateway set.
- The Internal Network set configured in ISA during the initial install should only include address ranges that are present on your internal network. This can be checked and edited in the ISA management MMC under "Configuration > Networks > Networks (tab) > Internal".
- If you intend to use Chaperon's email notifications (recommended), the ISA server must have access to a mail server. An ISA rule that allows the "localhost" network to access the mail server or to access a network the mail server resides on will be needed.

3. Chaperon Installation

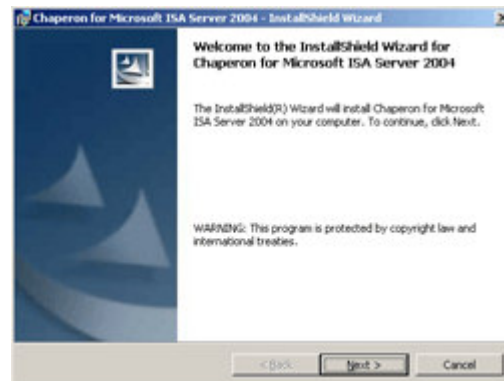
Chaperon can be installed on the following ISA server configurations:

- **Standalone CSS** – Chaperon will manage only the first array that was installed onto the CSS.
- **CSS/Array Member** – Chaperon will manage the array that the server is a member of.
- **Array Member** – Chaperon will manage the array that the server is a member of.

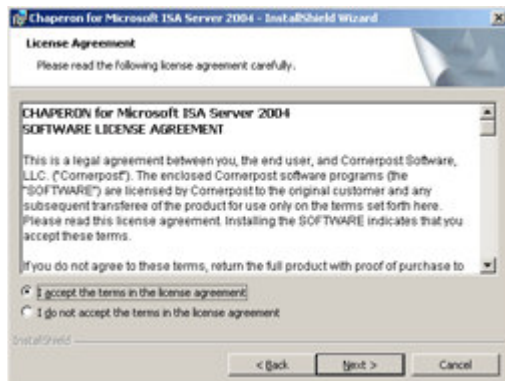
One Chaperon installation per array is all that is required to maintain filtering and monitoring for the array. Although it is not required, the filter maintenance tasks and monitoring tasks can be split between two coexisting Chaperons in a single Array. This is done by installing a second Chaperon onto an additional array member and setting one Chaperon to be the "Rules Engine Server" and the other as the "Activity Monitor Server" on the "Enterprise Settings" tab of the Chaperon Control Panel. These changes require a restart of Chaperon on both array members.

Using an Administrator account, download the Chaperon Installation onto the ISA server and double-click the setup to begin.

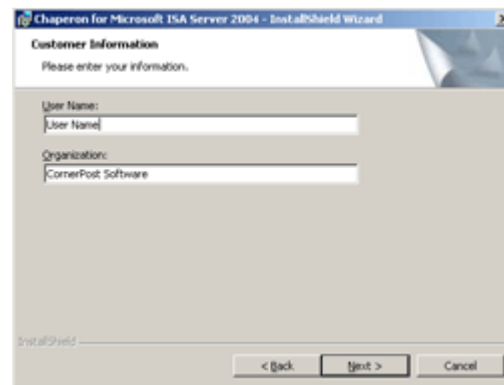
Click Next to proceed with the Installation.



After reading the license agreement, if you accept, check the box stating that you accept the terms within the license agreement and click Next.



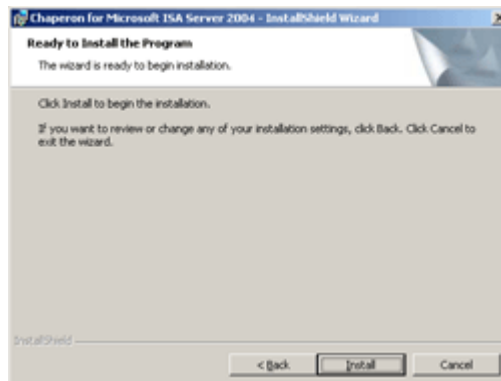
Enter a user name and organization name, and click Next.



Choose to perform a complete setup and click Next.



Setup is now ready to begin. Click Install to begin the installation.



Setup will prepare Chaperon to function with the ISA server during the initialization process.

Notes:

- If this is not the first Chaperon instance being installed in the particular array, you will be prompted if initialization should occur. If this is the case, select "No" to skip this process. Only the first Chaperon installed per array is required to perform the initialization.
- This process can take several minutes to complete and should not be interrupted.

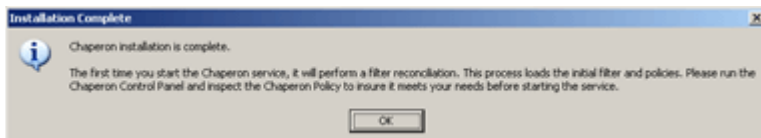


Chaperon will now prompt to download the full filter. Click Yes to begin the download.

If the download fails, ensure that the ISA server has a rule that allows the "localhost" network http access to the "external" network and that any upstream firewalls allow outbound http.



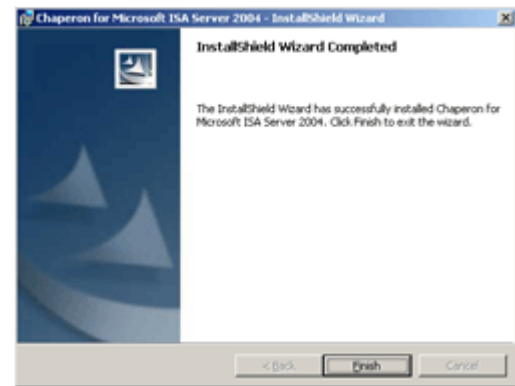
In order for Chaperon to function properly with Enterprise Edition ISA, the steps outlined in the message shown left must be completed. Instructions for completing these steps follow in the Chaperon Service Configuration section. Click OK to continue.



Chaperon installation is now complete. Click OK.

Click Finish to exit the installer.

Continue to section 4 to complete the Chaperon service configuration. Chaperon will not function until those steps are performed.

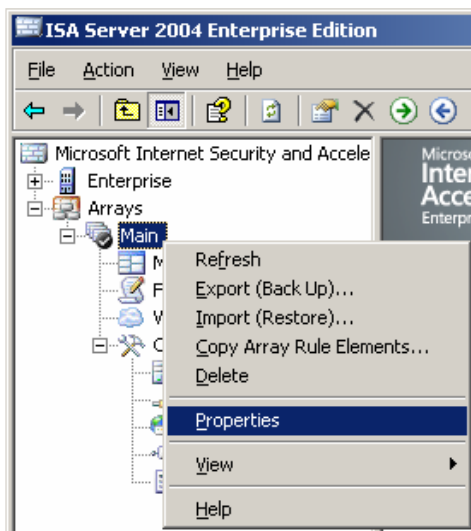


4. Chaperon Service Configuration

In order for Chaperon to function on an Enterprise ISA 2004, specific ISA Server and service configurations must be completed first. If these steps are not completed, Chaperon will not function.

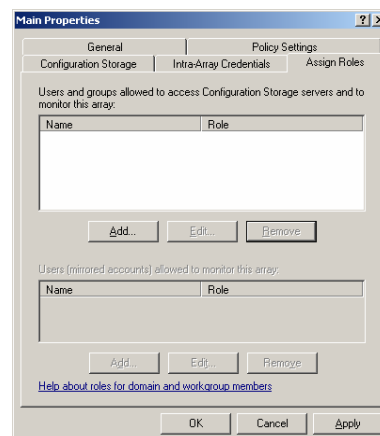
Note: In the following examples, the username created for Chaperon to use is **MainArrayAdmin**, the domain being used is **EnterpriseTest**, the array is named **Main**, and the server name is **Member-One**.

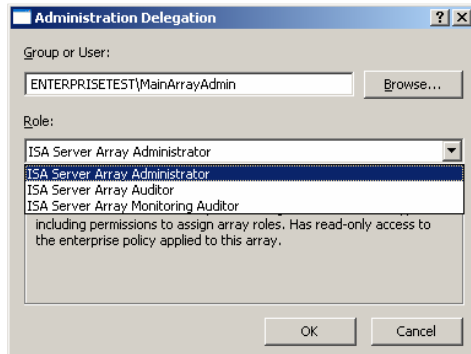
Within Active Directory Users and Computers, create a new account specifically for Chaperon to use. This user does not have to be added into any additional groups.



Within the ISA Server Enterprise Edition MMC, expand Arrays and right-click the Array that Chaperon is to manage, and then click Properties.

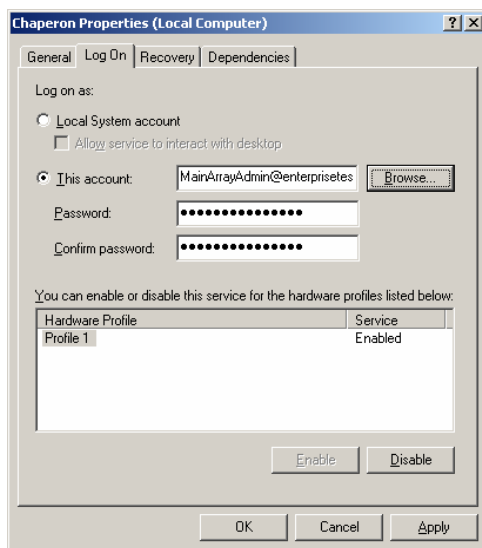
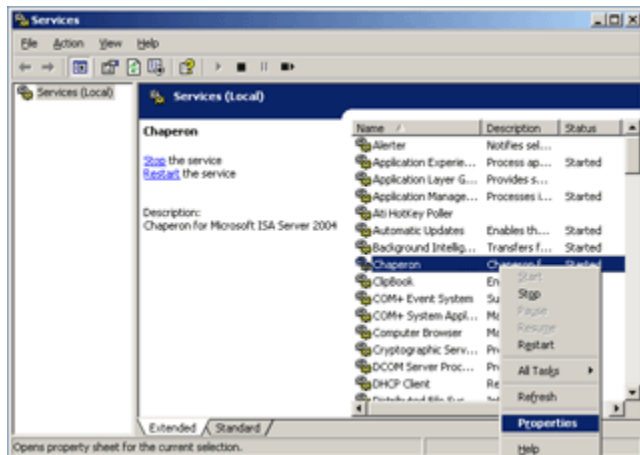
Click the Assign Roles tab, and then click the Add button.





By typing the username or using the browse button, enter the user that was newly created for Chaperon to use. In the Role section, select “ISA Server Array Administrator”. Click OK to close the add window then click Apply on the Administration Delegation Properties window. The Apply/Cancel bar should appear in the ISA MMC, click Apply for ISA to commit the changes.

Open the Services MMC by clicking “Start > Run” and typing “services.msc”. Locate the Chaperon service, followed by right-clicking it and selecting properties.

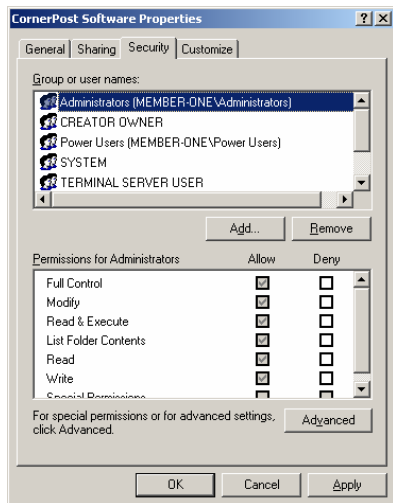


On the Log On tab, check the “This account” button. Enter or browse for the username that was created for Chaperon, then enter and confirm the password. Click Apply followed by OK.

Right click on the start button and click Explore to open a windows explorer.

Expand “Program Files” and locate the “CornerPost Software” directory. Right-click the directory and select Properties.

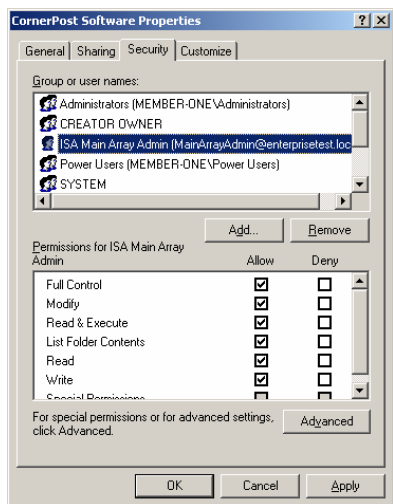
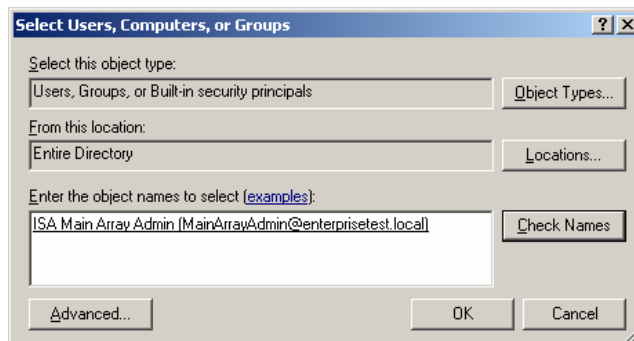




Chaperon's new user account must now be set to have full control of all Chaperon files. Click the Security tab, then click Add.

Add the account created for Chaperon into the box and click OK.

Ensure that the correct domain or that "Entire Directory" is selected for a location; otherwise the user will not be found.



Chaperon's user account will now be listed in the box. Select that username, and then check the "Allow" box labeled "Full Control".

Click OK.

All of the necessary steps have been completed in order for Chaperon to function properly. Continue to section 5 for important information that should be noted before the Chaperon service is started for the first time.

5. Important Post Chaperon Installation Information

- The Chaperon service is set to start automatically at boot, but will not be started when installation is complete.

- When the Chaperon service is started for the very first time, it begins performing its initial filter load that creates the filtering objects and policy rules in the ISA server.
- The initial filter load is only needed once, and can take hours depending on the speed of the machine. On average, a machine with a 2.4Ghz CPU and 1 GB of RAM will take around 1.5 hours to complete the initial filter load.
- There will be no filtering in any way until the initial filter load is completed.
- **It's extremely important that the load process not be interrupted in any way** by making changes to Chaperon or ISA, or by rebooting the server. If the process is interrupted, the filter load may have to be restarted from the beginning, or at worst, **it could cause issues requiring reinstallation of both ISA and Chaperon**. Start the Chaperon service only when the server will have a few hours to run uninterrupted. Keep in mind that since the service is set to automatic that **Chaperon will start if the server is rebooted**.
- Once the load completes, Chaperon will have a basic filtering policy in place that will filter all users. During the filter load, the "Rules Engine" section on the Chaperon Control Panel will state "Active – Reconcile". Once the load has completed, the "Rules Engine" section will state "Idle".
- Refer to the Chaperon configuration manual, or to "Help > Chaperon Help" in the Chaperon Control Panel for configuration information.

Activity Monitor	Active - Monitoring
Last Monitor Event	3/6/2006 10:55:45 AM
Rules Engine	Idle
Last Filter Update	3/6/2006 6:24:21 AM
Next Filter Update	<not scheduled>
Queued Operation	<none>

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