

Teramind on AWS

Deployment Guide

Ver 7.4 (11 APR 2024)



Table of Contents

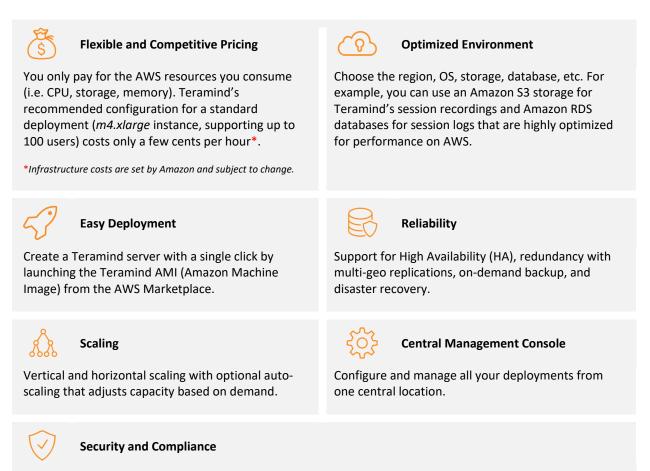
Teramind on AWS Overview2
Benefits of Deploying Teramind on AWS2
Primary Server Requirements
Database Server Requirements 4
OCR Server Requirements
Storage Requirements
Agent Requirements
Prerequisites
Creating an AWS Instance9
Creating an RDS Database
Adding an S3 Storage
Finishing the Deployment
Setting up the OCR (optional)
Installing the Teramind Agent
Firewall & Proxy Considerations
Antivirus Considerations
Additional Configurations
Changing the License Key
Updating the Server
Setting Up the Active Directory / LDAP Integration33
SMTP Email
SSL Certificate
Architecture
Technical Specifications
Installation Support and Troubleshooting

Teramind on AWS Overview

All Teramind solutions are available to deploy on Amazon's distributed, highly scalable, and reliable Amazon Web Services (AWS) platform as a Private Cloud option. This deployment guide will help you discover what you can expect from your Teramind on AWS deployment and provide you with installation prerequisites, step-by-step instructions, technical and support information.

Benefits of Deploying Teramind on AWS

If you prefer on-premise deployments but unwilling to incur the cost and hassle of an in-house infrastructure or you want to move to the Cloud but have been concerned about compliance, security or have made the transition and already host on AWS, then Teramind on AWS is the right choice for you. With our AWS Private Cloud hosting option, enjoy the benefits of both worlds: cost and scalability comparable to a Cloud deployment and security and flexibility similar to an On-Premise solution. Here are some infrastructure benefits you can expect if you choose to deploy Teramind on AWS:



Firewall, encryption at rest, SSL encryption, VLAN, SSH tunnels, 2FA, IP whitelisting, and encrypted disks allowing for easy regulatory compliance for HIPAA, GDPR, PCI DSS, and more make it ideal for Teramind customers in government, healthcare, finance, and other regulated industries.

Primary Server Requirements

Deployments for under 1,000 concurrent users can be hosted on one all-inclusive server, in most cases. EC2 instance(s) should be provisioned based on the expected number of concurrent monitored sessions, according to the following table:

Concurrent Users*	Server Requirements	EC2 Instance Type
Up to 100	1 Teramind Master Server (VM)	• m4.xlarge
Up to 500	1 Teramind Master Server (VM)	• m4.2xlarge
Up to 1, 000	1 Teramind Master Server (VM)	• m4.4xlarge
	1 Teramind Master Server (VM)	• m4.4xlarge
Larger deployments: 1,000 or more concurrent users	1 Teramind App Server (VM) per 1,000 concurrent users	• m4.4xlarge
	1 Teramind BI Server (VM)	• m4.4xlarge

*The requirements are applicable for a typical user who works on a single computer with Full HD (1920x1080) screen resolution, doing regular office work. If the users have multiple screens, higher-resolution screens, or have an unusual work pattern (e.g., watching many videos) then the requirements will be higher.

Database Server Requirements

Concurrent Users*	Server Type	CPU/RAM/Disk
		• CPU: 2 vCPU
Up to 100	db.t3.medium	• RAM: 4 GB
		• Disk: 100 GB**
		• CPU: 4 vCPU
Up to 500	db.t3.xlarge	• RAM: 16 GB
		• Disk: 500 GB**
		• CPU: 8 vCPU
Up to 1, 000	db.t3.2xlarge	• RAM: 32 GB
		• Disk: 1 TB**
Larger deployments:		 CPU: 16 vCPU
1,000 or more concurrent users	db.m4.4xlarge or more	• RAM: 64 GB
1,000 of more concurrent users		 Disk: 1 TB or more**

*The requirements are applicable for a typical user who works on a single computer with Full HD (1920x1080) screen resolution, doing regular office work. If the users have multiple screens, higher-resolution screens, or have an unusual work pattern (e.g., watching many videos) then the requirements will be higher.

** Disk size is estimated for 1 year of average usage and may vary depending on monitored data, monitoring profiles, etc.

OCR Server Requirements



You need to set up at least one OCR Database Node and one Mining Node for the OCR features to work.

No of Users*	Server Requirements	EC2 Instance Type
Less than 200 users	1 OCR Database Node	• m4.xlarge
	1 OCR Mining Node	• m4.4xlarge
Larger deployments of 200 or	1 OCR Database Node	m4.xlargeDisk: 100 GB
more users	1 OCR Mining Node per 200 users	• m4.4xlarge
		• Disk: 24 GB

*The requirements are applicable for a typical user who works on a single computer with Full HD (1920x1080) screen resolution, doing regular office work. If the users have multiple screens, higher-resolution screens, or have an unusual work pattern (e.g., watching many videos) then the requirements will be higher.

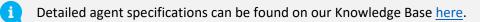
You will need to adjust the disk size as you add or remove video recordings over time. See the <u>Storage Requirements</u> section below for more information.

Storage Requirements

	The Teramind virtual appliance comes with a primary volume of 50 GB by default. This volume contains the Teramind server application and database. The size of this volume can be increased at a later point in time.
Primary Storage	1 Teramind requires the primary volume to be on SSD or equivalently fast storage for deployments above 500 users.
	BI Classifications needs about 5GB of disk space plus additional disk space equivalent to about 20% of your current DB size. So for example, if you have a database of 100GB the BI deployment will need 20GB+5GB = 25GB space. Check out this KB article to learn how to update your BI classifications.
Storage for Screen Recordings	The simplest way to add scalable storage is to use AWS S3 Storage. For instruction on how to do so, check out <u>this step</u> . S3 Storage is mandatory if you have a multi-server
	deployment (a deployment that has more than one Teramind App Server).

Agent Requirements

Supported Platforms	 Microsoft Windows 8 and up (64-bit) Microsoft Windows Server 2012 and up macOS 13 (Sonoma), macOS 12 (Monterey), macOS 11 (Big Sur), macOS 10.15 (Catalina) and macOS 10.14 (Mojave) * * At the moment, Teramind on Mac has limited functionalities. check out what features are currently supported <u>here</u>.
Sessions	 Stand-alone workstation / server Terminal server (RDS) * Application / Session server Citrix VMware Horizon * Ideally, terminal servers should have a maximum of about 30 users or less depending on the number of screens and monitoring settings. Otherwise, you may have a performance impact.
Load	Approximately 30 MB - 50 MB memory and 1-3% CPU utilization, depending on user activity
Visibility	Hidden or revealed desktop agents available
Deployment	 Silent MSI Deployment via Group Policy or SCCM Dashboard-based silent remote installer
Bandwidth	Approximately 10 kbps upstream depending on user activity level & number of screens
Offline Storage	Teramind features offline recording on the Silent/Hidden Agent (Windows). This means that in case of network downtime, the agent will save all data locally, and continue to enforce the policies and rules. Once the connection is re-established, the agent will upload the data to the server at a throttled pace. The offline storage buffer is configurable in monitoring settings and takes approximately 1GB per 160 hours of work time.



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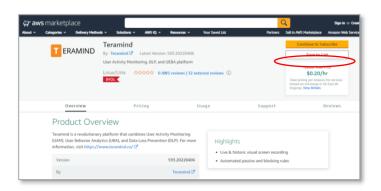
Prerequisites

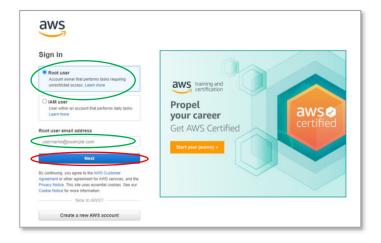
To get started, you will need:

- An AWS account
- Your Teramind license key, available from Teramind Self-Hosted portal at: <u>https://www.teramind.co/portal</u>
- An SSH client like Putty if you are using Windows



Creating an AWS Instance





Step 1-1

Visit:

https://www.teramind.co/deployment/aws and click the **Check out Teramind on Amazon Marketplace** button. which will take you to the *Overview* tab on Teramind's deployment page on AWS.

Once there, click the **Continue to Subscribe** button on the top-right corner.

Step 1-2

If you are not signed in to you AWS account already, you will be asked to sign in.

Note that you will need a Root user account to be able to follow the steps on this guide.

Enter the root user email address and click the **Next** button.

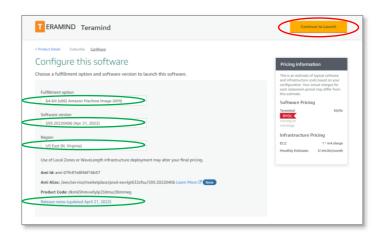
On the next sceen, enter the password (and complete any CAPTCHA challenge) to sign in.



Step 1-3

On the *Subscribe* tab, you will be shown the Teramind terms and conditions and the offer effective data/expiration information.

Click the **Continue to Configuration** button on the top-right corner.



T ERAMIND Te	ramind
< Product Detail Subscribe	Configure Launch
Launch this se	oftware
Review the launch configu	ration details and follow the instructions to launch this software.
Configuration details	
Fulfillment option	64-bit (x86) Amazon Machine Image (AMI)
	Teramind running on m4.xlarge
Software version	593.20220406
Region	US East (N. Virginia)
Usage instructions	
	_
Choose Action	
Launch through EC2	Choose this action to launch your configuration through the
Launch unough EC2	Amazon EC2 console.
	Launch

Amazon EC2 allows you to create virtual machines, or instances, that run on the AWS Cloud. Quickly get started by

Ι

Step 1-4

On the *Configure* tab, you can choose the **Fulfillment Method**, **Software Version**, and the **Region**. Be sure to select a region closest to you for better performance.

You can click the **Release notes** link at the bottom to see the release notes for the selected Software Version.

On the right, you will see the pricing information.

Click the **Continue to Launch** button when done.

Step 1-5

On the *Launch* tab, click the *Choose Action* pull-down menu and select Launch through EC2 option.

Click the **Launch** button. This will take you to the *Launch an instance* screen.

Step 1-6

Add additional tags

On the Launch an instance screen, under Name and tags, enter a name for your instance. For example, TeramindInstance.

EC2 > Instances > Launch an instance

Launch an instance Info

following the simple steps below.

Name and tags

TeramindInstance

Name

Instance type		
m4.xlarge		Compare instance types

Key p	air (login) Info				
You can the insta		ly connect to your instance.	Ensure that you have access	to the select	ed key pair before you launch
Key pair n	ame - required				\frown
Select					Create new key pair

Create key	pair	×
Key pairs allow	w you to connect to your instance secu	irely.
	e of the key pair below. When prompt e location on your computer. You will i <u>m more [</u>]	
Key pair name	2	
mynewpairke	ey2	
The name can inc	clude upto 255 ASCII characters. It can't incl	lude leading or trailing spaces.
Key pair type RSA		
O ED25519	ed private and public key pair crypted private and public key pair (Not sup	ported for Windows instances)
O ED25519	crypted private and public key pair (Not sup	ported for Windows instances)
C ED25519 ED25519 end	crypted private and public key pair (Not sup e format	ported for Windows instances)
ED25519 ED25519 end Private key file .pem	crypted private and public key pair (Not sup e format OpenSSH	ported for Windows instances)

Step 1-7

Select an instance under the *Instance type* section. For example, m4.xlarge with 4 vCPU and 16 GB memory.

For recommended instances, check out the <u>Primary Server Requirements</u> section on this guide.

Step 1-8

Click the **Create new key pair** link under the *Key pair (login)* section. This will pop up a *Create key pair* window.

Step 1-9

On the *Create new key pair* pop-up window, Enter a name for the key pair. For example, mynewpairkey2.

Make sure **RSA** is selected under the *Key* pair type and **.pem** is selected for the *Private key file format*.

Click the **Create key pair** button then save the file in a secure location. You will need it in <u>Step 4</u> to connect to your instance.

/PC - required Info			
vpc-da0bbea1 172.31.0.0/16	(default	;) 🔻 🤇	3
Subnet Info			
No preference		• (Create new subnet
Auto-assign public IP Info			
Enable		•	
irewall (security groups)			
A security group is a set of firewall rules that constance.			
security group is a set of firewall rules that co	entrol the traffic for your instance. Add rules to Select existin		
A security group is a set of firewall rules that constance.			
a security group is a set of firewall rules that constance.		g security g	

Step 1-10

Click the **Edit** button next to the Network settings section.

Then choose the **Select existing security group** option under *Firewall (security groups)*.

Finally, choose the **open-all** security group from the *Common security groups* list.

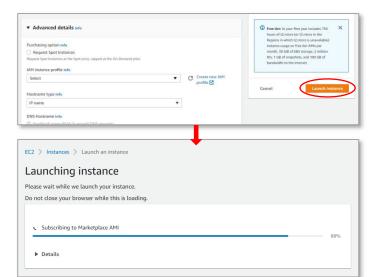
Configure storage Info	Advance
Currently no volumes details are specified and therefore the insettings Add new volume	stance will launch with the template default volume
0 x File systems	Edi
Configure storage Info	Advance
\frown	EBS volume Remove
	EBS volume Remove
	EBS volume Remove

Step 1-11

Click the **Add new volume** button under the *Configure storage* section. This will add a new stroage and let you enter options for it.

Enter a storage size in Giga Byte, for example 100 and select the type of volume, e.g., gp3.

For recommended storage configurations, check out the <u>Storage Requirements</u> section on this guide.



Step 1-12

If you want, you can configure Advanced details such as request a spot instance, change host name type, set auto-recovery option, etc. However, for this example, we do not need to change any of the advanced settings.

Click the **Launch instance** button. This will launch the instance and show a progress screen with the message, *"Subscribing to Markeplace AMI"*. Do not close your browser while the operation is taking place.

Step 1-13

Once the *Succes* screen is shown, click the **View all instances** button. This will take you to a window with a list of your instances.

New EC2 Experience X	Instances (1) Indu	_					C
EC2 Dashboard	Q Search Teramindlestance X	Clear filters					
EC2 Global View Events	Name	Ÿ	Instance ID	Instance state 🛛 🕫	Instance type 🔍	Status check	Alarm status
Tags	Teramindinstance		i-0c7644ef60597f7cd	@ Running @Q	m4.starge	2/2 checks passed	No alarms +
Limits	4						
Instances							
Instances new							

Step 1-14

On the *Instances* screen, you can enter your instance name in the **Search** box to narrow down the list.

Wait and pay attention to the **Instance state** and **Status check** columns. When the *Instance state* column says "Running" and the *Status check* column shows all the "checks passed", it means your instance is ready for use.

Note: you can click the **Refresh** C button on the top to refresh the page and see the latest status.

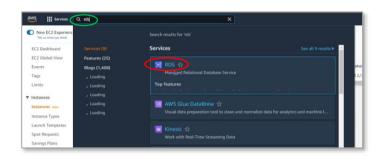




Creating an RDS Database

External databases are not mandatory in Teramind. However, you may want to use them to improve the scalability of your platform. External databases are also highly recommended for deployments over 100 concurrent users.

This section of the guide will show you how to create an AWS RDS database to be used with Teramind. If you already know how to do it, you can skip this section.

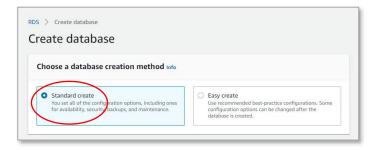


Step 2-1

From your *EC2 Management Console* page, on the top *Search* box, type **RDS**.

Select the **RDS** (Managed Relational Database Service) from the list of services. You will be taken to the *RDS Management Console* page.

WS III Services Q	Search for serv	ikes, features, blogs, dacs, and more	[Alt+5]			۵	4	N. Vieginia •	Teramind in
Amazon RDS	×	RDS > Databases							
Dashboard Databases		Databases	Group resources	Modify	Actions V	Resto	re from S	3 Create data	hase
Query Editor		Q. Filter by databases						< 1	۲
Performance insights Snapshots		DB identifier	▲ Role V	Engine $ au$	Region & AZ V	Size	Ŧ	Maintenance V	VPC
Automated backups Reserved instances		O database-1	Instance	PostgreSQL	us-east-1f	db.m6	g large	none	vpc-dal
Proxies								_	
Subnet groups									
Parameter groups									



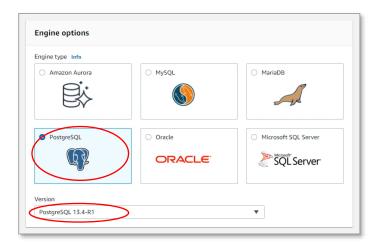
Step 2-2

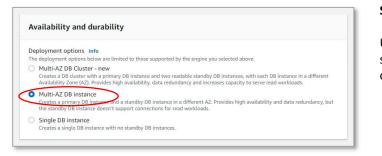
On the *RDS Management Console* page, select **Databases** from the left-hand sidebar.

Then, click the **Create database** button on the top-right corner of the screen.

Step 2-3

On the *Create database* screen, select **Standard create** under the *Choose a database creation method*.





DB instance identif			
b b motorice recent	B instance. The name must be unique across al	l DB instances owned by your AWS ac	count in the current AWS
Region.			
database-2			
	er is case-insensitive, but is stored as all lower First character must be a letter. Can't contain tr		
 Credentials Set 	ngs		
Master username	ifo		
Type a login ID for the	master user of your DB instance.		
postgres			
1 to 16 alphanumeric	naracters. First character must be a letter.		
Auto generate	password		
Amazon RDS can	enerate a password for you, or you can specify	your own password.	
Master password	fo		
$\langle \rangle$			
Constraints: At least 8 (at sign).	rintable ASCII characters. Can't contain any of	the following: / (slash), '(single quote), "(double quote) and @
Confirm password	nfo		

Select **PostgreSQL** under the *Engine options* section.

Select the latest *Version* for the database. For example, **PostgreSQL 13.4-R1**.

Step 2-5

Under the Availability and durability section, select the **Multi-AZ DB instance** option.

Step 2-6

Under the Settings section, type a name in the DB instance identifier field. For example, database-2. Assign a Master user name such as postgres.

Enter a Master password and confirm it.

Remember or take note of the username and password as you will need them in <u>Step</u>

<u>4</u>.

Scroll down until you reach the *DB instance class* section.

DB instance (class Info					
Standard	l classes (includ	es m classes)	\geq			
Memory	optimized class	es (includes r and	l x classes)			
Burstable	e classes (includ	les t classes)				
db.m6g.lar	ge			-		
2 vCPUs 8	GiB RAM Net	work: 4,750 Mbps		•		

Under the *DB instance class* section, select the **Standard classes** option.

For recommended DB instances, check out the <u>Database Server Requirements</u> section on this guide.

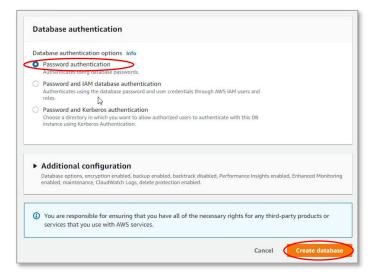
Step 2-8

For this example's purposes, you can keep the default settings as is under the *Storage* section.

For recommended storage configurations, check out the <u>Database Server</u> <u>Requirements</u> section and for general storage guidelines, check out the <u>Storage</u> <u>Requirements</u> section on this guide.

Storage type Info	
Provisioned IOPS SSD (io1) Flexibility in provisioning I/O	
Allocated storage	
100	GiB
Minimum: 100 GiB. Maximum: 65,536 GiB	
Provisioned IOPS Info	
3000	IOPS
Minimum: 1,000 IOPS. Maximum: 256,000 IOPS	
Storage autoscaling Info Provides dynamic scaling support for your database's storage based on your application's needs. Enable storage autoscaling Enabling this feature will allow the storage to increase once the specified threshold is exceeded.	
exceeded. Maximum storage threshold Info	
Charges will apply when your database autoscales to the specified threshold	

Connectivity		C
Virtual private cloud (VPC) VPC that defines the virtual netw	info orking environment for this DB instance.	
Default VPC (vpc-da0bbea		
Only VPCs with a corresponding I	DB subnet group are listed.	
 After a database is cr 	eated, you can't change its VPC.	
Subnet group Info DB subnet group that defines wh	ch subnets and IP ranges the DB instance can use in the VPC you selected.	
default	•	
Amazon EC2 instances and d	evices outside the VPC can connect to your database. Choose one or more V	PC security groups that
Amazon EC2 instances and d specify which EC2 instances a No	evices outside the VPC can connect to your database. Choose one or more V ind devices inside the VPC can connect to the database. P address to the database. Only Amazon EC2 instances and devices inside th	
Amazon EC2 instances and d specify which EC2 instances a No RDS will not assign a public I your database. VPC security group Choose a VPC security group to a	and devices inside the VPC can connect to the database.	e VPC can connect to
Amazon EC2 instances and d specify which EC2 instances a No RDS will not assign a public I your database. VPC security group Choose a VPC security group to a	Ind devices inside the VPC can connect to the database. P address to the database. Only Amazon EC2 instances and devices inside the low access to your database. Ensure that the security group rules allow the C Create new	e VPC can connect to
Amazon EC2 instances and d specify which EC2 instances of No RDS will not assign a public I your database. VPC security group Choose a VPC security group to a incoming traffic. Choose existing Choose existing VPC securi	Ind devices inside the VPC can connect to the database. P address to the database. Only Amazon EC2 instances and devices inside th low access to your database. Ensure that the security group rules allow the ty groups Create new VPC security group	e VPC can connect to
Amazon EC2 instances and d specify which EC2 instances of No RDS will not assign a public I your database. VPC security group Choose a VPC security group to a incoming traffic. Choose existing Choose existing VPC securi	Ind devices inside the VPC can connect to the database. P address to the database. Only Amazon EC2 instances and devices inside th low access to your database. Ensure that the security group rules allow the y groups Create new Create new VPC security group	e VPC can connect to
specify which EC2 instances i No RDS will not assign a public I your database. VPC security group Choose a VPC security group to a incoming traffic. Choose existing Choose existing Choose existing Choose existing VPC security groups	Ind devices inside the VPC can connect to the database. P address to the database. Only Amazon EC2 instances and devices inside th low access to your database. Ensure that the security group rules allow the ty group: Create new Create new VPC security group	e VPC can connect to



Under the *Connectivity* section, you can configure various connectivity options according to your needs.

For this tutorial's purposes we will use the following settings:

Select **Default VPC** for the *Virtual private cloud* (*VPC*) option.

Select Yes for the Public access option.

Select **Choose existing** for the *VPC security group* option.

Under the *Existing VPC security groups*, select the **default** and **open-all** options.

Step 2-10

Under the Database authentication section, select **Password authentication** for the Database authentication options.

Under the Additional configurations section, you can specify additional options such as encryption, backup, enhanced monitoring, etc. For this tutorial's purposes, we will keep them to their default settings.

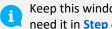
Under the *Estimated monthly costs* section, you will be able to see the cost breakdown for your database.

Once ready, click the **Create database** button at the bottom to create the database. It might take a few minutes for the database to be ready.

mazon RDS ×	Creating database of Your database might	database-2 it take a few minutes to laurich						
shboard statues	ND5 > Databases							
utry Editor	Databases					Group resource	(g) ···	dity Action
eformance insights vapohots	Q. Filter by dat					and the second	181	
tomated backups	CL CHILD IN AN							
served instances	E 08	identifier	Rale V	Engine V	Bagino & AZ $=$	Size V	Status v	CPU
Daries.	O da	tabase-1	Instance	PostgrafiQL	us-east-1f	th relig large	O Available	1 1.00%
				PostgraSQL	45-8202-1f	db.m6g.large	O Available	1 3.81%

On the *Databases* screen, wait and pay attention to the Status column. When the Status column says, "Available", it means your database is ready for use.

Note: you can click the **Refresh** C button on the top to refresh the page and see the latest status.



Keep this window open as you will need it in <u>Step 4</u>.



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Adding an S3 Storage

Teramind does not need external storage. However, Teramind can utilize a file storage system for screen and audio recordings, captured attachments, printer documents, and metadata such as user images. AWS S3 is an efficient, secure, scalable, and redundant solution to store objects like these. The S3 storage will improve the scalability of your platform and is recommended for deployments of over 100 concurrent monitored users.

For more information, check out the <u>Storage Requirements</u> section of this guide.

To use the AWS S3 storage, you will need to attach an Identity and Access Management or IAM profile to your storage instance. IAM enables you to manage access to your AWS services and resources securely. Using IAM, you can create and manage AWS users and groups and control user permissions.

This guide will show you how to create an IAM profile and attach it to your S3 instance. If you already know how to create one, you can skip this section.

New BC2 Experience ×	Instances (1/1) who			C Conner	Instance state	Action A D Litte	di limitate es	1000
Mardage dat	(g)====					Correct		> 0
EC2 Dashboard	Teramedrotance X Cear filters					View datails		
EC2 Global View	Contraction of the second seco		11210000		Australity Zone V	Manage instance store	- 14	
Eserves		Andrease state 7 instance type 7	Statut check	Alarys status	Austrativity Zone V	Austance settings		4
Tage	Tereredivatives >0x70Heb020977xd	Quantif and seconds	@ 2/1 theory parase	no starra 🕈	10-0817-18	Networking		.199
LAGEL					Charge security proops	Security		
Indakou					for minipar pressed	Amonger and templates		
Induced me				 	Notify UAM rule	Honitor and troublesho	et (* 1	
Bislance Spins								
Lawsch Templates								
Spot Requests								
Savings Rans								
Reserved Instances 🐜	Instance: j-0c264af60592f2cd (Teramindinstance)		-				-	8 ×
Reserved Instances 🐜	Instance: i-0c7664af60597f7cd (TeramindInstance)		-)	e ×
Reserved Instances	Salact on instance above							e ×
Reserved Instances	and the second se							o ×
Reserved Instances	Salact on instance above							0 ×
Respond Instances Dedicated Instances Capacity Reservations Images AMIn	Salact on inspece above <u>Setable</u> Security Nativecking Storage Status ched		-	h	ogte Pol affirman		2	0 ×
Reserved Instances 🐜	Selact on-instance above Telefon Security Networking Sociage Status check Telefon Security Networking Sociage Status check Telefon Security Sela	is Hasiboting Tays	-		opte Pvd Addresses		,	0 ×
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If you choose No IAM Role, any IAM role that is currently attached to the instance will be removed. Are you sure you want to remove from the selected instance?

Step 3-1

Go to the **Instances** screen from your EC2 *Management Console*. Make sure the instance you want to use is selected.

Click the **Actions** button near the top-right corner. From the pull-down menu, select **Security > Modify IAM role**.

Step 3-2

On the *Modify IAM role* screen, click the **Create new IAM role** link.

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Step 3-3

On the *Roles* screen, click the **Create role** button.

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Step 3-4

Select the default **AWS service** option under the *Trusted entity type* section.

Select the **EC2** option under *Use case* section.

Click the **Next** button to continue.

Step 3-5

From the list of permission policies, select the one named 'AmazonS3FullAccess' (you can type in the Search field to quickly locate it from the list of permission policies).

Click the Next button to continue.

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	No tags associated with the resource.

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Step 3-6

Under the *Role details* section, enter a *Role name*, e.g., teramindinstanceiam.

On this screen, you can also add a decription for the role, select trusted entities, add tags, etc. But for this example, we will not need any of those.

Scroll down to the bottom and click the **Create role** button.

Step 3-7

Go back to the **Instances** screen from your EC2 Management Console. Make sure the instance you want to use is selected.

Click the **Actions** button near the top-right corner. From the pull-down menu, select **Security > Modify IAM role**.

Step 3-8

On the *Modify IAM Role* screen, click the **Choose IAM role** field and type or select the IAM role you created in the previous steps (teramindinstanceiam).

Click the **Save** button to attach the IAM role to your instance.



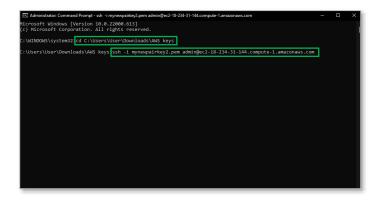
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Finishing the Deployment

As the last step of the server deployment process, you will need to assign the external database and storage to your master instance, setup the Teramind Server using the SSH and finally, configure your account settings on the Teramind Dashboard.

After you finish the deployment, you should update your server and apply any latest patch. Check out this article on our Knowledge Base: <u>How to update the Teramind Server and BI</u> <u>Classification (On-Premise / Private Cloud deployment)</u>.

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Step 4-1

Go back to the *Instances* window you left open in <u>Step 1-14</u>.

Select the master instance you created (e.g., **TeramindInstance**). Copy or write down the **Public IPv4 DNS** address for the instance you created (e.g., ec2-18-234-31-144.compute-

1.amazonaws.com).

Step 4-2

Launch an SSH session. If you are on Windows, you can use a tool like Putty or a similar utility for the SSH. Make sure you have administrative access.

Change to the folder/directory where you donwloaded the key pair file in in <u>Step 1-9</u> by using the CD command. For example, cd

c:\Users\User\Downloads\AWS keys

Type: ssh -i <pem file> admin@<DNS>

Where cpem file> is name of the key
pair file you downloaded in Step 1-9 (e.g.,
mynewpairkey2).

<DNS> is the Public IPv4 DNS address you copied in the previous step (e.g., ec2-18-234-31-144.compute-1.amazonaws.com).

Press Enter.

Step 4-3

Once the server is ready, you will see this message, 'Welcome to Teramind!'. Under the message you will be given options to assign roles for the nodes/hosts, beginning with the Master role.

Enter a **name** at the *Role (master)* prompt or just press Enter to keep the default name.

Step 4-4

At the Use external database (yes/NO) type yes and press Enter.

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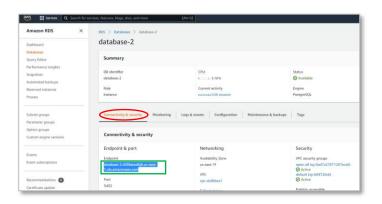
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to Teramind!



Step 4-5

Go back to the Databases window you left open in Step 2-11.

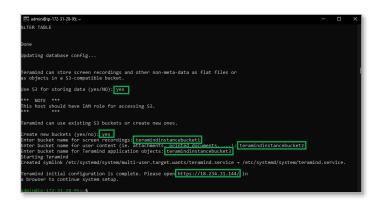
Click the name of the database you created (e.g., database-2). This will take you to the selected database's page.

Step 4-6

On the database's page, click the Connectivity & security tab.

Copy the hostname under Endpoint (e.g., database-2-c039aeodbjlt.useast-1.rds.amazonaws.com)





Step 4-7

Go back to the SSH windows.

When prompted, paste the **Database IP or hostname** you copied in the previous step.

At the following prompts, enter the **Database username** and **Database password** you created in <u>Step 2-6</u>.

Step 4-8

After Teramind has finished the database initializations, it will show the prompt, *Use S3 for storing data?*. Enter **Yes**.

Enter **Yes** at the *Create new buckets?* prompt.

Then you will be prompted to enter names for three buckets: one for screen recordings, one for user content i.e. attachments or printer docs, and the third one for application objects. Give unique names to each bucket (e.g., teramindinstancebucket1.

teramindinstancebucket2, and teramindinstancebucket3).

Please see the **S3 Bucket Naming Requirements** below for information on rules related to the naming of the buckets.

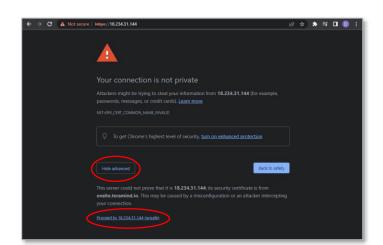
Once you have entered the bucket Teramind will set up the servers. Finally, you will be provided with a **link** to your dashboard (e.g.,

https://18.234.31.144/). Click the link or enter it on your browser to continue.

S3 Bucket Naming Requirements

The S3 buckets must have a name that conforms with the naming requirements for non-US Standard regions. Amazon S3 defines a bucket name as a series of one or more labels, separated by periods, that must adhere to the following rules:

- The bucket name can be between 3 and 63 characters long and can contain only lower-case characters, numbers, periods, and dashes.
- Each label in the bucket name must start with a lowercase letter or number.
- The bucket name cannot contain underscores, end with a dash, have consecutive periods, or use dashes adjacent to periods.
- The bucket name cannot be formatted as an IP address, i.e. 198.51.100.24.



Step 4-9

When you open the Teramind Server link in the browser, you may be displayed a warning message. This is because you are using an HTTPS connection without an SSL certificate. Most browsers will allow you to continue with an override action.

If you are using Google Chrome, click the **ADVANCED** link on the page and select the **Proceed to...** option.



Step 4-10

When you enter the Teramind Dashboard for the first time, you will see the *End-User License Agreement* screen.

Scroll down and click the Accept & Continue button.



Lets secure your Teramind installation

We'll create an Administrator's account using your email address and a password that you select.

Step 4-11

On the *Welcome to Teramind* screen, select your language and timezone and click **CONTINUE**.

Step 4-12

On the *Lets secure your Teramind installation* screen, enter an email and a password for your Admin account.

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Licenses	Your trial license key:	3			
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Teramind DLP On-Premise	S00 Endpoints 2 Terminal servers	Trial license	2021-05-21	2021-09-30	
Teramind DLP On-Premise	25 Endpoints 2 Terminal servers	Trial license	2020-09-18		<u>Mey</u>
Teramind DLP On-Premise	25 Endpoints 2 Terminal servers	Trial license	2020-05-23	2020-05-06 Expired	

Step 4-13

Open a new browser tab and go to: <u>https://www.teramind.co/portal</u>. Login with the admin email and password.

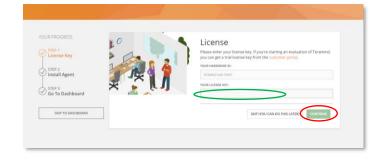
Click the Licenses tab.

From the list of licenses, click the **Key** link under the *Actions* column. A pop-up will display the license key.

Copy the license key or write it down.

Step 4-14

Go back to your Teramind Dashboard. Enter the license key and click the **CONTINUE** button.



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-	C License Key	Install agents those has no ware to read wrents on a	our endpoints
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Step 4-15

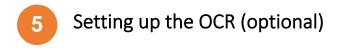
At this stage, you can install the Teramind agent and start monitoring the targeted computer(s). Or, you can do it later.

To install the agent, click one of the options under *Install agents*. If you need help installing the agent, check out <u>this article</u> on our Knowledge Base. You can also watch this short video: <u>Downloading and</u> <u>Installing Teramind's Hidden Agent</u>

To install the agent at a later time, click the **SKIP TO DASHBOARD** button.

ĺ

You are done setting up your Teramind Server. If you want to use the OCR feature, continue to the <u>Step 5</u> below.



If you want to use the OCR feature, you will need to set up two nodes in addition to a master node.

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Step 5-1

Create the *master* VM as usual.

Then, create two additional VMs. The first node will store the OCR videos. In Teramind, we will refer to it as *teracv*. The second node is for the OCR database. In Teramind, we will refer to it as *elastic*.

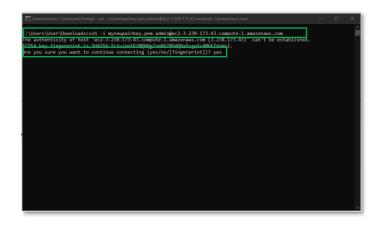
Make sure all the nodes are in the same **Security Group**.

For more information on the OCR server requirements, check out the <u>OCR Server Requirements</u> section on this guide.

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Step 5-2

From your AWS portal's *Instances* page, copy the **Public IPv4 DNS** address for the *teracv* instance.



Step 5-3

Launch an SSH session. If you are on Windows, you can use a tool like Putty or a similar utility for the SSH. Make sure you have administrative access.

Type:
ssh -i "<pem file>"
admin@<DNS>

Where <pem file> is the full path of the key pair file you downloaded when creating the *teracv* VM.

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	Instance ID	Moniforing Tags I-0ar033a2969ccb124	Usage In	structions					Public DNS (IPv4)	ec2-54-210-113-175.co	mpute-1 amazonavis	com
			Usage In	rstructions					Public DNS (IPv4) IPv4 Public IP	ec2-54-210-113-175.co	mpute-1 amazonavis	.com
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	Instance 10 Instance state	i-0ar033a2969ccb124 running	Usage In	structions					IPv4 Public IP IPv6 IPs Private DNS	54.210.113.175 - b-172-31-26-179.4c2.h		.com
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📧 OpenSSH SSH client		
Are you sure you want to continue connecting (yes/no/[fingerpint])? yes Marning: Permanently added "ec3-328-173,63; compute-1.amazonas.com,J.238.173.43' (ECDSA) to the list of Linux 1p-172-31-51-124 4.9.0-15-ama64 #1 509 Debian 4.9.258-1 (2021-03-08) x86_54	known	í
The programs included with the Debian GNU/Linux system are free software; the exact distribution terms for each program are described in the individual Files in Jurs/Amerides//YcopryEgNt.		
Debian GNU/Linux comes with ABSOLUTELY NO WARRANTY, to the extent permitted by applicable law.		
Welcome to Teramind!		
*** Basic Server Configuration ***		
Please select the role for this host. For single-node deployments (without OCR) you just need one 'master' node.		
Available roles: master - main deployment node which contains the web management interface terasrv - opplication server that processes agent connections teracr - OCR (session mining) server node labatic - OCR (session mining) datapase node		
ole (master): teracv inter master address: 172.31.59.151		

				Q 500									
instances (5) into											C	Connect Inst
Q, Filter inst													
search: Test,	X Clear filters												
Name	~	Instance ID	Instance state	v Instance	type v	Status check	Alarm statu		Availabil V	Public IPv4 DNS	Ŧ	Public IPv6 v	Security group ra
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<*DNS*> is the Public IPv4 DNS you copied in the previous step (*Step 5-2*).

If prompted to confirm the connection, enter yes.

Press **Enter**. The server will be ready in a few minutes.

Step 5-4

On the AWS portal's *Instances* page, select the *master* instance.

At the bottom of the screen, you will notice a *Description* panel is shown.

Copy or write down the Private IP address from the *Description* panel.

Step 5-5

Go back to the command prompt window.

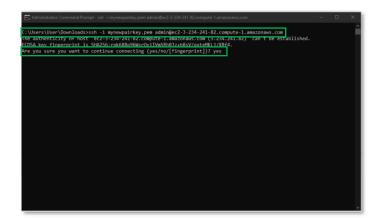
When asked, enter teracv at the *Role* (*Master*) prompt.

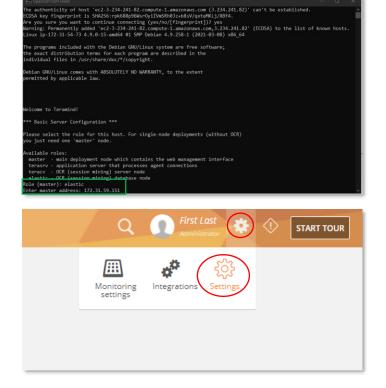
Paste the Private IP address you copied in the previous step (*Step 5-3*).

It will take a few minutes for Teramind to set up the *teracv* node.

Step 5-6

From your AWS portal's *Instances* page, copy the **Public IPv4 DNS** address for the *elastic* instance.





Step 5-7

Launch an SSH session. If you are on Windows, you can use a tool like Putty or a similar utility for the SSH. Make sure you have administrative access.

Type:
ssh -i "<pem file>"
admin@<DNS>

Where <pem file> is the full path of the key pair file you downloaded when creating the *elastic* VM.

<*DNS*> is the Public IPv4 DNS address you copied in the previous step (*Step 5-6*).

If prompted to confirm the connection, enter yes.

Press **Enter**. The server will be ready in a few minutes.

Step 5-8

When asked, enter elastic at the *Role* (*Master*) prompt.

Paste the Private IP address of the master node you copied in *Step 5-4*.

It will take a few minutes for Teramind to set up the *elastic* node.

Step 5-9

We will now need to approve the two nodes on the Teramind Dashboard.

Login to your Teramind Dashboard on the master server.

Click the **Cog Wheel** icon near the top-right corner of the dashboard and select **Settings** from the pull-down menu.

	≡ Settings				
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на: 910000ститу 1929 ванилов	Alem Login screen Security	? Teramind can be depto cluster, and what their t	yed as a cluster of servers to handle a large num onnect and want to join this cluster. Configuratio unclear should be	ther of users. Since this is the master node, in which nodes you want to accept into the	
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		Nodes (P ADDRESS 172,31,51,124	nori il Sicreen mining database node	Orter O bytes fitter, O bytes lotar	APPROVE PORKET
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Step 5-10

From the *Settings* screen, click the **Server** management tab.

Turn on the ENABLE MULTI-NODE DEPLOYMENT option under the Security settings section.

Under the *Nodes* section, you will notice the *Screen mining database node* and the *Screen mining node*.

Approve both nodes by clicking the **APPROVE** buttons.

You are now all setup for the OCR.



Installing the Teramind Agent

Teramind Agent can be installed both locally and remotely. Check out this article to learn how to download and install the agent: <u>How to download and install the Teramind Agent</u>.

Firewall & Proxy Considerations

In most cases, you should not have to change any settings to get Teramind to work. By default, the Teramind Agents communicate with the Teramind server on two ports: 443, and 10000.

The Teramind management interface is entirely web-driven and runs over HTTPS (port 443). This means that most proxies will allow the traffic through, provided you properly installed your SSL certificates.

For live and recorded screen playback, as well as live session listing, Teramind uses Websockets. Although Websockets operates as HTTPS over port 443, some older proxies may not recognize this protocol. In either case, if you are experiencing trouble accessing your Teramind dashboard, try to disable your proxy temporarily to isolate the cause.

Also note that, if the audio recording is enabled, Teramind Agent will connect to the server on a random UDP port in the range 1000-65535 to send the audio recordings. Make sure UDP ports in that range are enabled and open from the endpoint to the server.



If you encounter any issues with your firewall or proxy, check out this troubleshooting article for help: <u>Firewall and proxy issues</u>.

Antivirus Considerations

Teramind Agent and its drivers come digitally signed with an extended validation certificate. We've made every effort to coordinate our signature with the major antivirus vendors, and as a result, Teramind should work normally with the vast majority of antivirus software.



If you encounter any issues, check out the Antivirus Configuration Guide for help.

Additional Configurations

Once you have installed Teramind successfully, you can configure other aspects of the server, agent and other settings entirely from the web-based dashboard.

		The Administro Administrator	ator 🔅	\Diamond	START TOUR
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Current activity		Time worked	Activity	Online	0 Idle 🌣 🗙

Once you have installed To access the configuration settings, hover over the **Cog icon** icon the top-right corner of the dashboard, and click **Settings**.

The Settings screen will open.

Here are a few key settings you should configure. For additional information, check out the <u>Settings</u> section on the Teramind User Guide.

Changing the License Key

If for any reason, you want to change the license key (for example, when upgrading from a trial to a paid account), you can do that from the **Settings** > **About** tab.

Check out this article for help: <u>How to change the license key (On-Premise / Private Cloud Deployment).</u>

Updating the Server

Teramind regularly releases server updates for the On-Premise deployment on our Self-Hosted Portal and the virtual machine images may not always contain the latest server updates. These updates may contain bug fixes, security patches and new features. To keep your deployment up-to-date, we recommend that you update your server regularly. To update your server, download the latest server image from the Self-Hosted Portal at <u>www.teramind.co/portal</u>. Under the Download > Teramind Update section. Download the platform update file (with a TMU extension) by clicking the download icon.

Once you have downloaded the file, you can upload it to the dashboard under Settings > About tab.

Check out this article for help: <u>How to update the Teramind Server and BI Classification (On-Premise</u> <u>deployment)</u>.

Setting Up the Active Directory / LDAP Integration

Though not mandatory, Teramind can be integrated with Active Directory to import your users, computers, groups, attributes and other important meta-data. The LDAP attributes can then be used to create user/computer accounts and filter BI Reports.

You can configure Active Directory from the **Settings** > **Active Directory** tab.

Check out the <u>Settings > Active Directory</u> section on the Teramind User Guide to learn how to setup an Active Directory / LDAP integration.

SMTP Email

Configuring the SMTP settings is necessary for the Teramind server to be able to send outbound emails such as the daily digest emails sent to administrators, scheduled reports, low storage notifications, license alerts, and password recovery emails.

You can configure the SMTP from the Settings > SMTP tab.

Check out this article for help: <u>SMTP Configurations (On-Premise)</u>.

SSL Certificate

Teramind strongly recommends proper configuration of SSL in order to avoid browser warnings and restrictions. Some browsers will not allow WebSocket communications if the certificates are invalid. This may prevent you from watching live screens or screen recordings.

Configuring the SMTP settings is also necessary for the Teramind server to be able to send outbound emails such as the daily digest emails sent to administrators, scheduled reports, low storage notifications, license alerts, and password recovery emails.

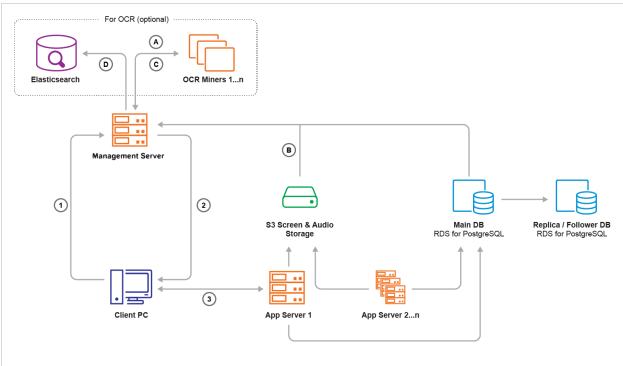
You can upload your SSL certificate from the Settings > SSL tab.

Check out the <u>Settings > SSL</u> section on the Teramind User Guide for more information. You can also create your own SSL certificates for use with your on-premise deployments.

To learn how to generate such self-signed certificates, check out this article.

To learn how to use a third-party certificate, check out this article.

Architecture



Legends:

- 1. Teramind Agent asks Management Server for an Application Server IP and port
- 2. Management Server responds
- 3. Teramind Agent connects to the assigned Application Server
- A. OCR Miner talks to the Management Server and asks for a record to process
- **B.** Management Server fetches a screen file from the S3 Screen & Audio Storage and sends it to the OCR Miner Node
- C. Once OCR is done, the OCR Miner sends results as text to the Management Server
- D. Management Server writes the OCR result text to Elasticsearch

The **Management Server** serves the admin dashboard, load balances agents, and provides data to the OCR Miner Nodes. Teramind Agent connects to an **Application Server** via an always-on, TLS-encrypted connection, using our own protocol based on Google Protocol Buffers. **OCR Miners** are stateless and work with spot instances.

Technical Specifications

Regions / Data Centers	Teramind on AWS is available on the following data centers/regions (subject to change). We recommend you choose a region closest to you for faster service and lower latency: US East (N. Virginia) US East (Ohio) US West (N. California) US West (Oregon) Canada (Central) EU (Frankfurt) EU (Ireland) EU (Ireland) EU (London) EU (Paris) Asia Pacific (Singapore) Asia Pacific (Sydney) Asia Pacific (Seoul) Asia Pacific (Tokyo) Asia Pacific (Mumbai) South America (São Paulo)
OS	64-bit Linux/Unix, Debian 12 AMI.
Databases	EBS volume by default. Optionally S3, RDS/Postgres can be used as screen/audio recording storage.
Instances	Teramind supports various EC2 instances types (m4, t2, t3, m3, etc.) for different sizes (micro, large, extra large, etc.). Please check out the <u>Primary</u> <u>Server Requirements</u> section for more information.
License	BYOL (bring your own Teramind license). Click <u>here</u> to try or subscribe to Teramind on-prem/private cloud.

Installation Support and Troubleshooting

Chat	From your Teramind Dashboard or our website: <u>https://teramind.co/</u>
Email	support@teramind.co