Teramind Cloud

Deployment Guide

Ver 1.0 (21 NOV 2024)

TERAMIND

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Teramind Cloud Overview

Teramind Cloud is the easiest and quickest deployment option. With Teramind Cloud, you just install the Teramind Agent on the workstations, Windows servers, or terminal servers you want to monitor and see data on your dashboard immediately. This is a fully managed solution which means everything automatically scales to ensure speed and reliability. Teramind will also take care of the maintenance and updates, so your IT team doesn't have to.

Here's a summary of what Teramind Cloud comes with:

Architecture	Hybrid
Data Center	Redundant platform – hosted in a secure, Tier 3 data center (Oracle)
License	User-based
Server	No server or hardware to install
Updates	Automated – managed by Teramind
Storage	You will get 6 months of video recording storage and unlimited storage for meta-data.
Backups	Automated – managed by Teramind
Scalability	Unlimited – managed by Teramind
Support	24/7 follow-the-sun
Built-In Integrations	• SIEM & Project Management software • SSO • Active Directory

Benefits of Teramind Cloud

Here are some benefits you can expect if you choose to deploy Teramind Cloud:



No Licenses to Manage

Teramind Cloud is licensed based on a monthly or annual subscription. Pricing is calculated based on number of users and terminal servers. All the updates, patches, support, and maintenance are included in the subscription.



No Server or Hardware to Install

Teramind Cloud is a fully managed service. You do not need to install any server or appliance. All the server maintenance, scaling, storage, and backup are handled by Teramind for your complete peace of mind.



Deploy in Minutes

There is no server to deploy. All you need to do is install the Agent. Even this can be automated with remote batch installation and Active Directory integration. With Teramind Cloud, you can get started and running in minutes.



Save Time & Money

Avoid the cost and headache of maintaining your own infrastructure. Teramind Cloud is priced per user, so you can add licenses as you grow. You can also subscribe to a yearly plan to get additional discounts. Volume discount is available too.



Immediate Software Updates

All the updates are handled by Teramind. Security, patch management, and new features are made available to you as soon as they are released. You can also enable auto-updates for the Agent.



Easy Integration

Export data to SIEM, IDS/IPS, or Project Management systems. Active Directory integration and REST-based API open up the possibility for coordinated security orchestration.



Robust Security

Teramind Cloud comes with built-in security to ensure the privacy and protection of your data. All data are kept in AES-256 encrypted format and only secure connections are used to communicate between the users and our servers.

Additionally, Teramind is ISO/IEC 27001:2013 and SOC 2 Type I compliant. Which means we follow the highest standard in information security.

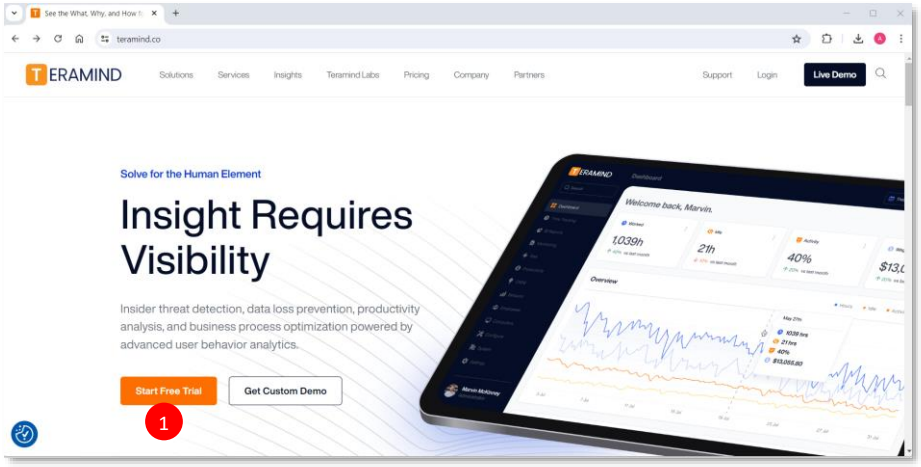


Tier-3 Data Centers

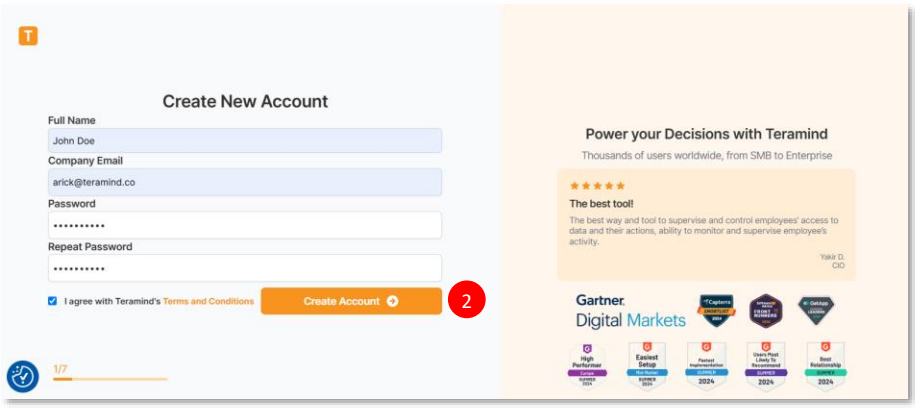
Teramind Cloud deployments are hosted on Tier-3 data centers where it's designed to meet even the strictest reliability requirements of regulated and mission-critical industries including finance, manufacturing, utilities, and government.

From a security and compliance perspective, the data centers are accredited for PCI, SOC 2, ISO, and other industry standards.

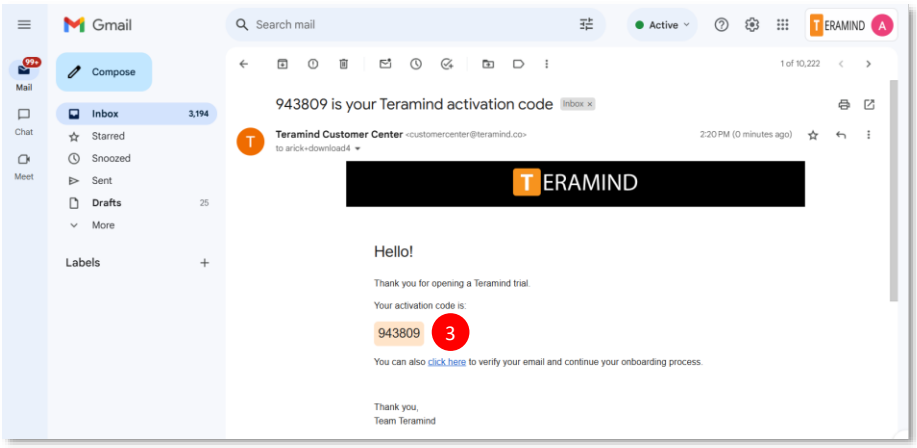
1 Signing Up for Teramind Cloud



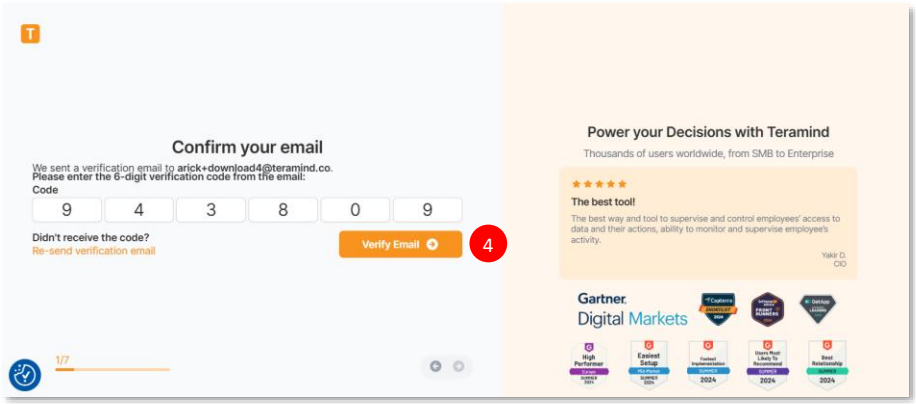
1. Go to www.termind.co and click the **Start Free Trial** button. You will be taken to the *Create New Account* screen:



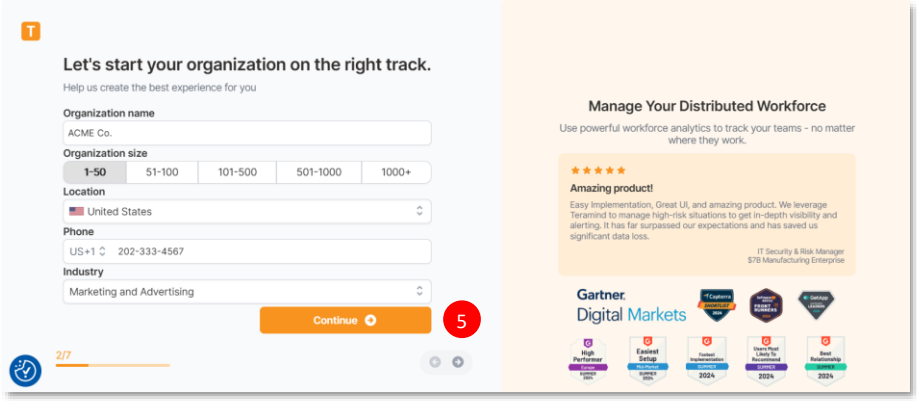
2. Enter your name, company email address, and password, and tick mark the terms and conditions. When ready, click the **Create Account** button. You will receive an email with a six-digit activation code:



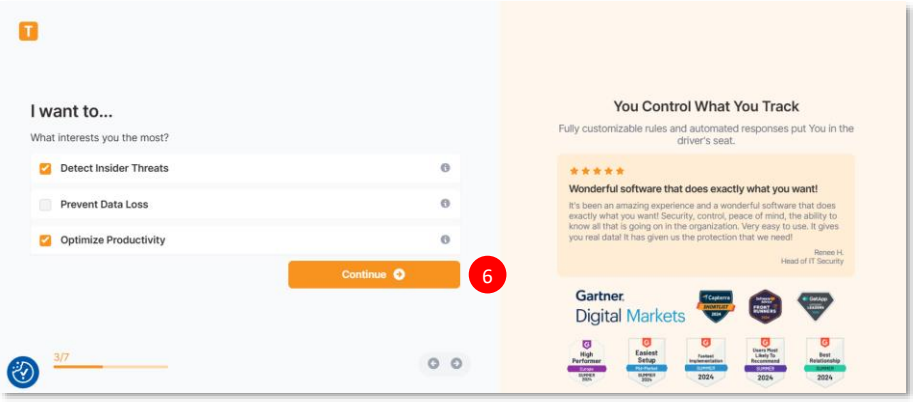
3. Copy the activation code.



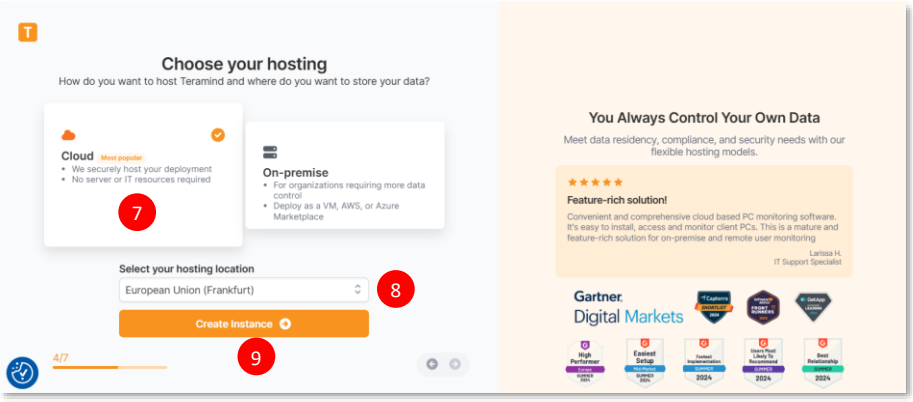
4. Enter the code in the *Confirm your email* screen and press the **Verify Email** button.



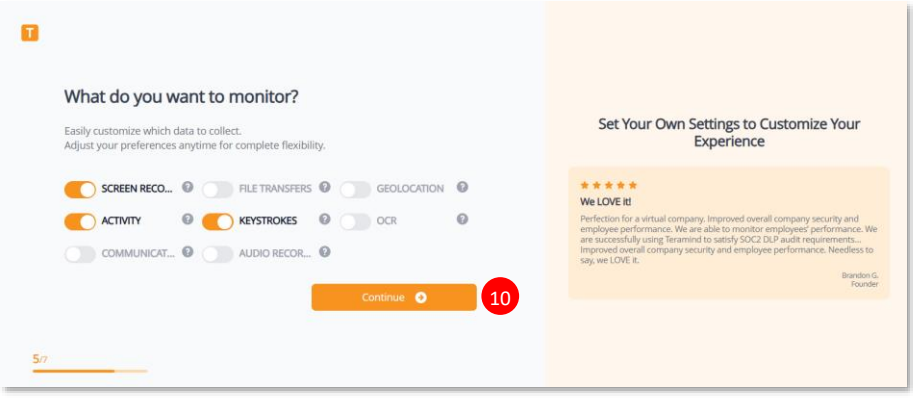
5. Fill out the form with your organization's details and then press the **Continue** button.



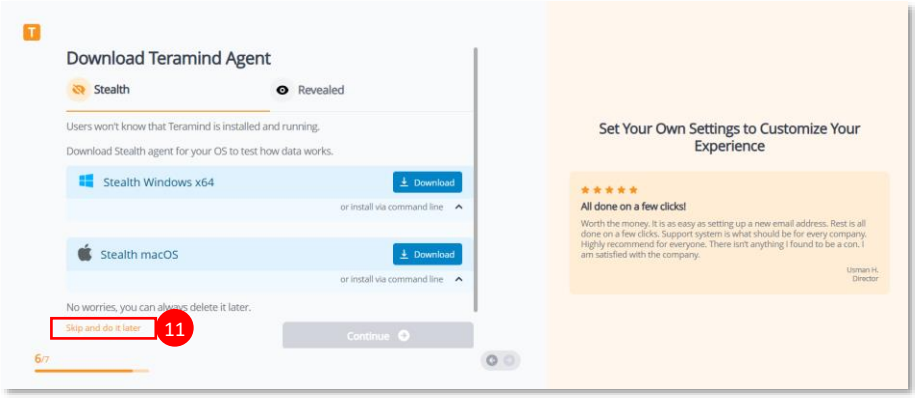
6. Select your use cases or how you want to use Teramind and press the **Continue** button.



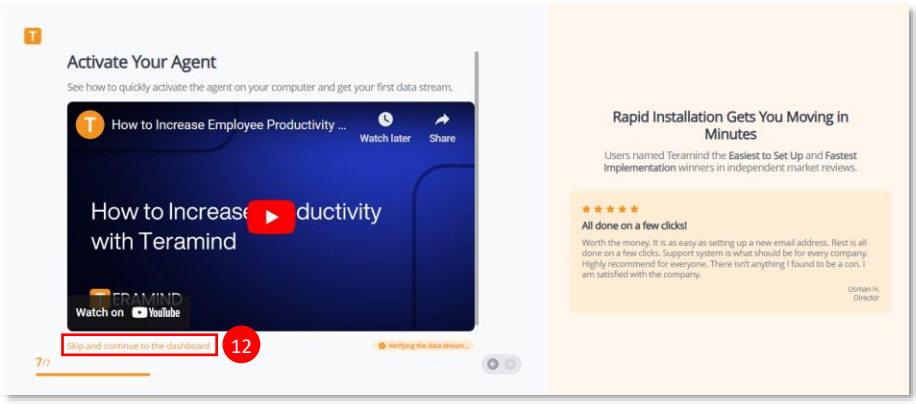
7. Select the **Cloud** option.
8. Select a region from the **Select your hosting location** drop-down menu. You can choose from the European Union or the USA data centers.
9. Click the **Create Instance** button. It will take a few seconds to prepare your instance. Once done, you will be taken to the *What do you want to monitor?* screen:



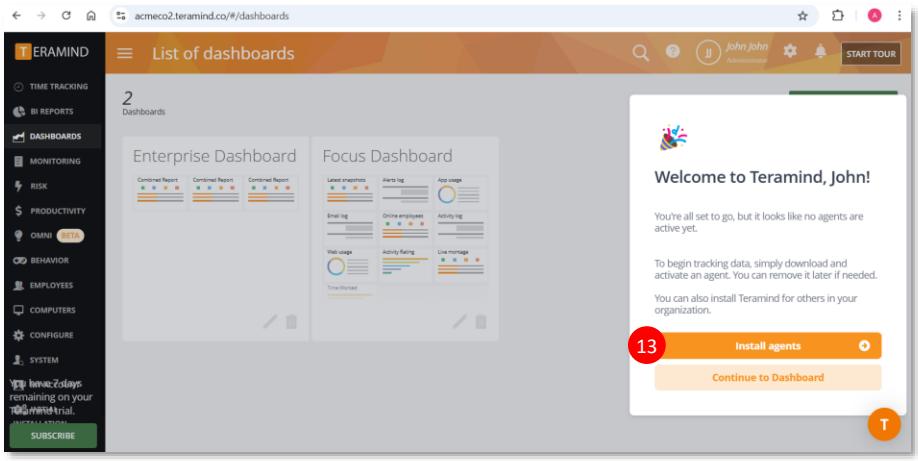
10. Select the types of data you want to collect and then press the **Continue** button. Note that you can change these options from the Monitoring Settings in the Dashboard later.



11. If you want, you can now download the Stealth or Revealed Agent and install it on the target computer(s). Or, you can click the **Skip and do it later** link to skip this step. For this guide, we will skip this for now. We show you how to install the Agent from the Dashboard in Step 2: Downloading and Installing the Agent section below.



12. Since we decided not to install the Agent at the moment, we can skip the *Activate Your Agent* screen. Click the **Skip and continue to the dashboard** link.



13. Click the **Install agents** button. This will take you to the *Download Agent* screen. Follow the instructions in the next section to continue.

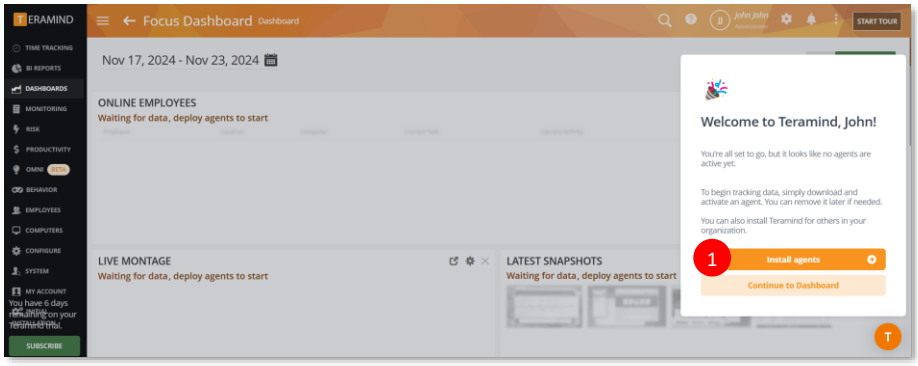


After the initial setup, you can access your Teramind Dashboard from the https://www.teramind.co/login link or your instance's direct URL (for example: `https://acmeco2.teramind.co/`).

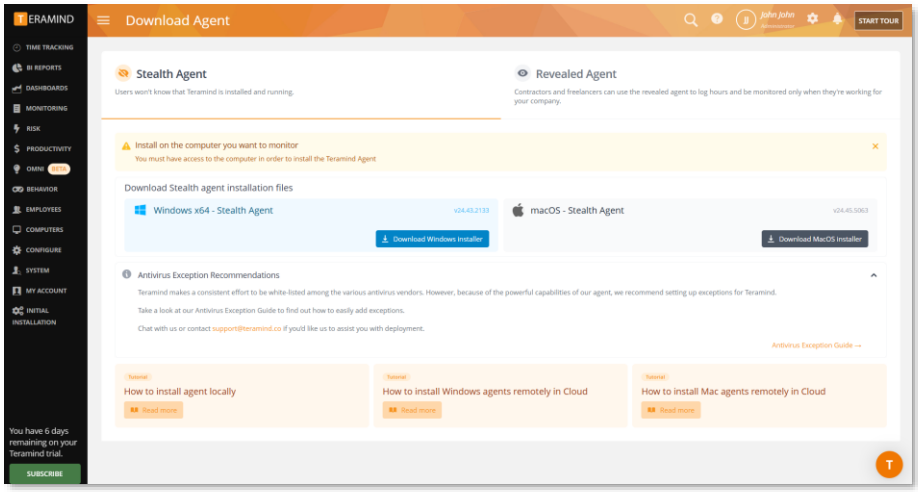
2 Downloading and Installing the Agent

For detailed instructions on downloading and installing the Agent check out the How to download and install the Teramind Agent article on the Knowledge Base.

After you have logged into the Dashboard for the first time, you will be shown a *Welcome* pop-up window:



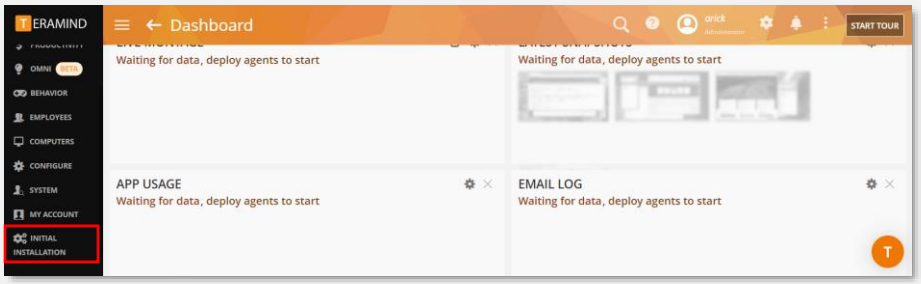
1. Click the **Install agents** button. You will be taken to the *Download Agent* screen:



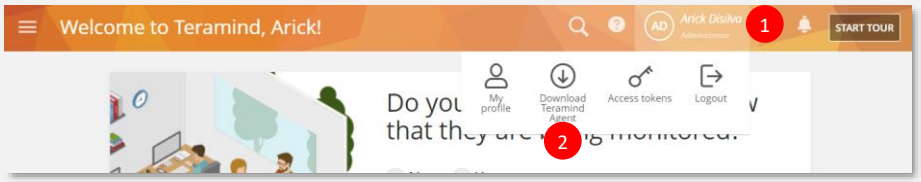
Teramind comes with two types of Agents: Stealth and Revealed. You can select which type of Agent you want to download from this screen. Follow the Stealth Agent or Revealed Agent section below for instructions.

Downloading the Agent Later

You can download the Agent anytime by clicking the **INITIAL INSTALLATION** menu:



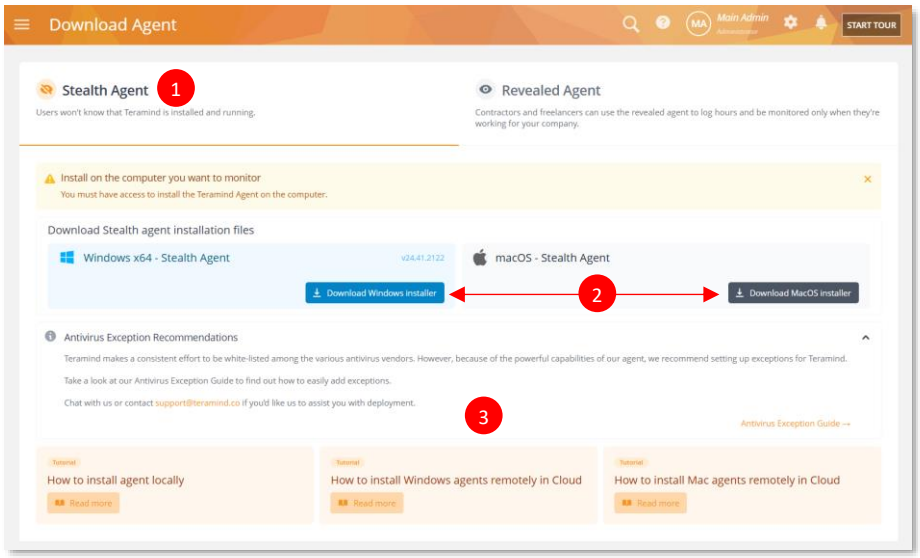
You can also access the installation screen from **User Menu** > **Download Teramind Agent**:



Stealth Agent

The Stealth Agent (also called the Hidden Agent or Silent Agent) tracks all the users on a computer. The computers tracked appear automatically on the Teramind Dashboard. Computer names must be unique. If you are trying to monitor multiple computers with the same computer name, only the first one will be monitored. The user's name will be taken directly from the computer. If multiple users are using the computer, they will each be added separately as employees. If a computer is renamed, Teramind will auto-update. The Stealth Agent is useful when you do not want your users to know that they are being monitored.

Downloading the Stealth Agent



1. Click the **Stealth Agent** tab from the *Download Agent* screen.

2. Click the **Download Windows installer** button or the **Download MacOS installer** button to download the installer.
3. Near the bottom of the screen, you will see links to the Antivirus Guide and other tutorials to help you with the deployment process.

If you are using an installation script or other automation, you can get the Agent download links from the Dashboard or through the API. This Knowledge Base article, How to Obtain the Agent Download Links (Cloud) shows you how.

Installing the Stealth Agent

Check out the following sections on How to download and install the Teramind Agent article on the Knowledge Base:

- Installing the Hidden Agent – Command Line (Windows/Cloud)
- Installing the Hidden Agent – Command Line (Mac/Cloud)

You can also remotely deploy the Agent. Check out the following article to learn how:

- Windows Remote Installation (Cloud)
- Mac Remote Installation (On-Premise and Cloud)

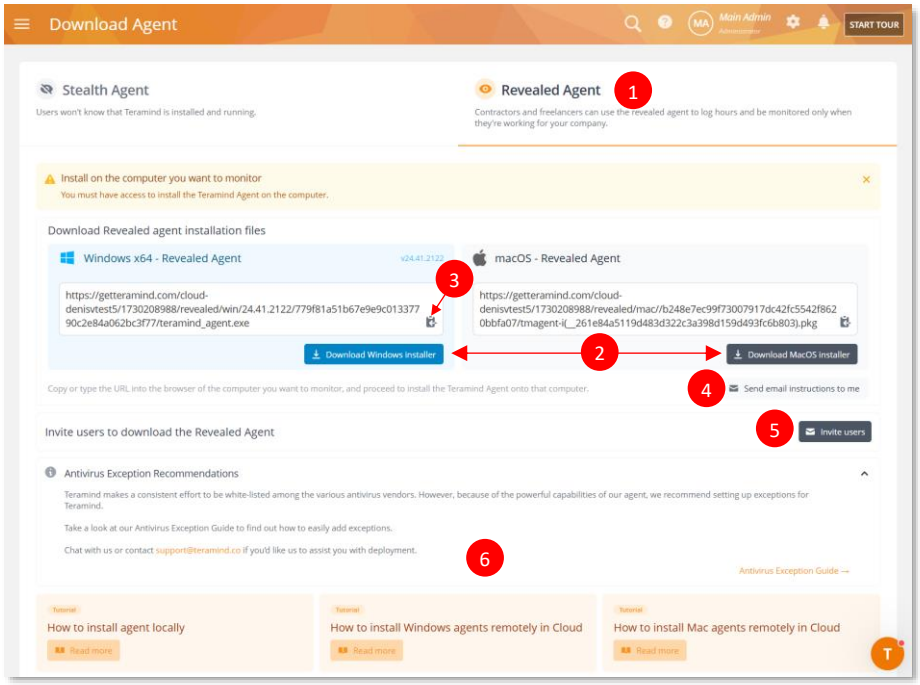
Protecting the Stealth Agent

You can optionally install the Stealth Agent in a protected mode. Installing the Agent in protected mode will prevent it from tampering or further hiding it from the user. To learn more about how to install the Stealth Agent in protected mode, check out the How to protect your Agent installation from tampering article on the Knowledge Base.

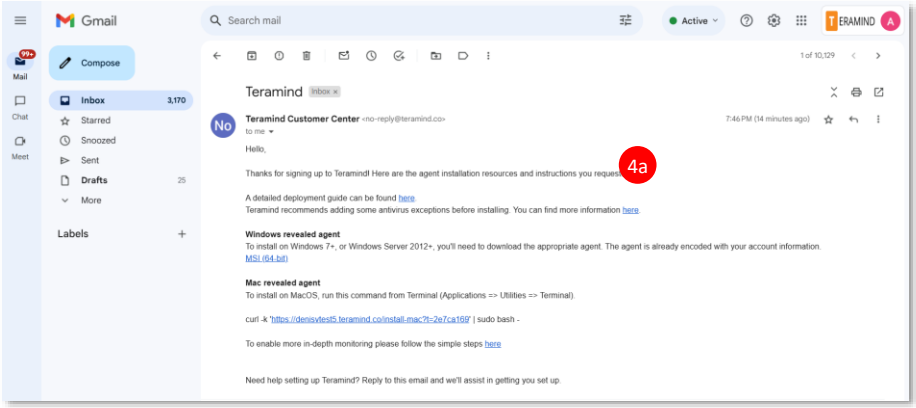
Revealed Agent

The Revealed Agent tracks users and computers but only when the user is logged in on the Agent. When a user launches a Revealed Agent, they have to log in using an account created in the Teramind Dashboard by an administrator. All the activities tracked will be linked to this account. Since the hours they work are clearly defined by the clock-in and clock-out times from the Revealed Teramind Agent, the payroll can be calculated, and tasks can be assigned to the users. This Agent is the perfect choice for monitoring contractors, vendors, and freelancers or when you want to let your employees choose how and when they are to be monitored.

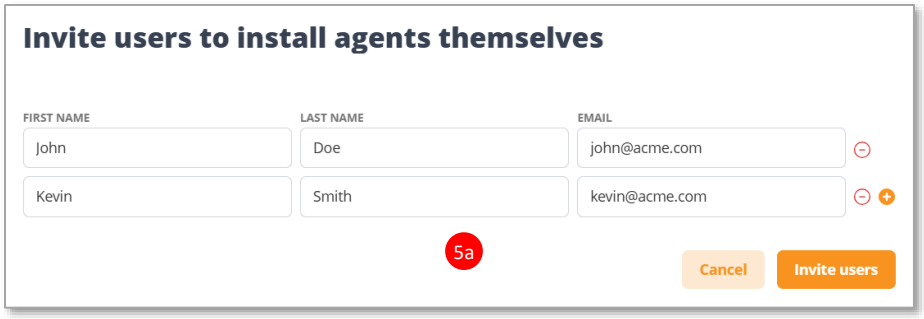
Downloading the Revealed Agent



1. Click the **Revealed Agent** tab from the *Download Agent* screen.
2. Click the **Download Windows installer** button or the **Download MacOS installer** button to download the installer.
3. You can also click the small **Copy** icon to copy the URL into the clipboard, open it in your browser, save the installer file on a USB stick, and take it to the target computer(s). The same installer can be used to install the Revealed Agent on multiple computers.
4. Click the **Send email instructions to me** link to get the instructions and download links to your email.
   a) The email will look like this:

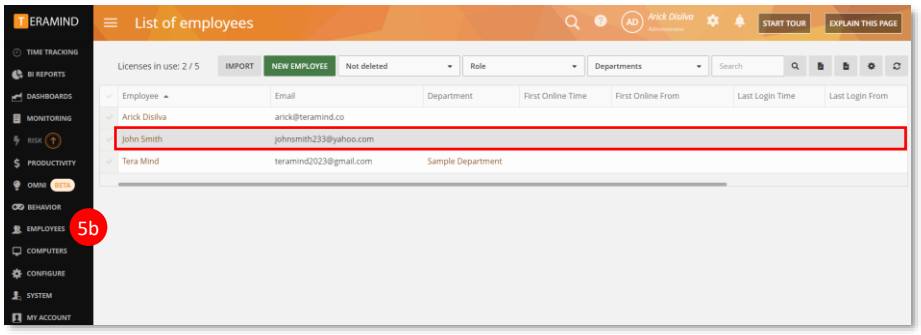


5. Click the **Invite users** option to create new employees and send invitations to their email addresses to install the Agent.
   a) When you click the **Invite user** button a new window will pop up:



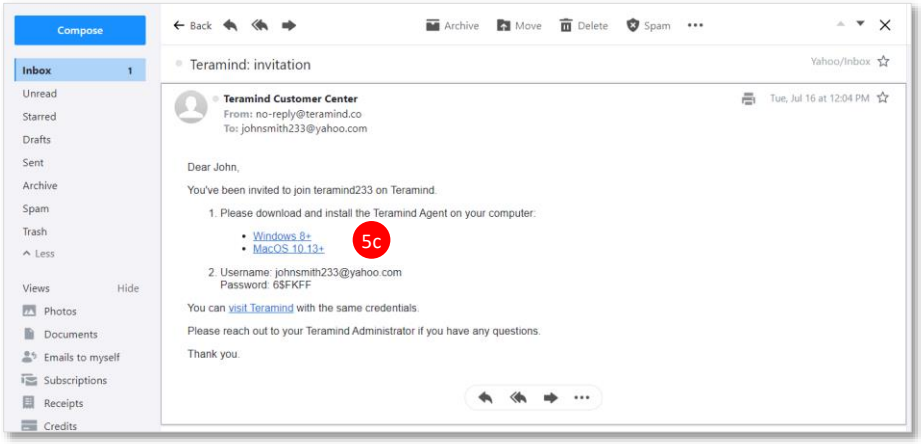
Enter the *FIRST NAME*, *LAST NAME,* and *EMAIL* address of an employee. You can add/remove employees by clicking the small **Plus** or **Minus** button next to a row. When done, click the **Invite users** button. Note that if you enter the email address of an existing employee, it will fail with the message "*Email is already in use*".

b) When you click the **Invite users** button, the user will be created and added to the employee list:



For more information about the *Employees* screen, check out the Employees section on the User Guide.

c) The user will receive an email with the invitation:



The user can click the Windows or macOS download link to download and install the Agent on their computer. The user can click the Windows or macOS download link to download

and install the Agent on their computer. The user can use the *Username* and *Password* included in the email to log into the Revealed Agent and if allowed, log into the Dashboard.

- Check out the Using the Revealed Agent article on the Knowledge Base to learn how a user can use it.
- Your can turn on the *User can login to Teramind Dashboard* option under the Employees > Account Info tab to let a regular user log into the Dashboard and access their information.

6. Near the bottom of the screen, you will see links to the Antivirus Guide and other tutorials to help you with the deployment process.

If you are using an installation script or other automation, you can get the Agent download links from the Dashboard or through the API. This Knowledge Base article, How to Obtain the Agent Download Links (Cloud) shows you how.

Installing the Revealed Agent

Check out the following sections on How to download and install the Teramind Agent article on the Knowledge Base:

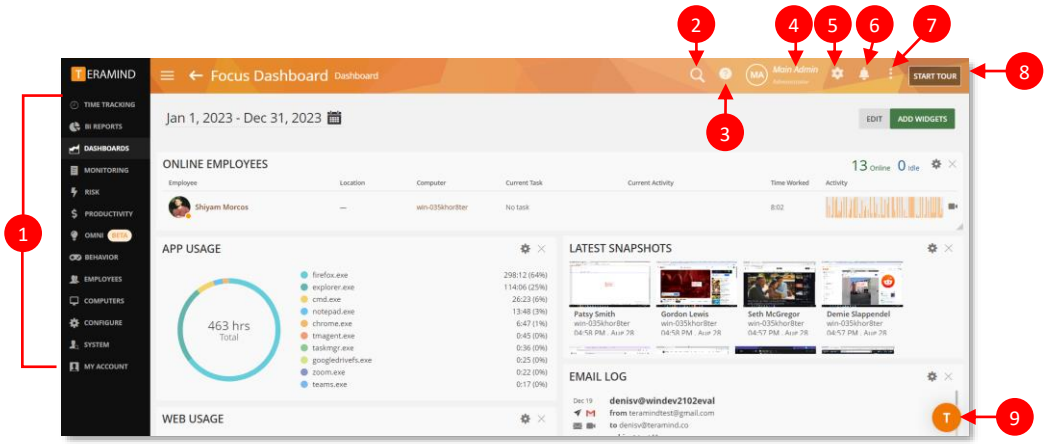
- Installing the Revealed Agent (Windows)
- Installing the Revealed Agent (Mac)

Using the Revealed Agent

Check out the How to use the Revealed Agent article on the Knowledge Base.

3 Using the Teramind Dashboard

As soon as the Agent is installed, you will see data showing up on the Dashboard. At this point, you are ready to use Teramind. Here are the main elements of the Dashboard interface:



1. Main Menu

The Main menu consists of the following items:

- *Time Tracking*: This menu offers you several time and task management features. You can create and manage tasks and timesheets, and track costs by employees or tasks. Employees can also access the web-based *Tracker* from this menu to clock in their time without installing the Teramind Agent. For more information, check out the Time Tracking section of the User Guide.
- *BI Reports*: This menu provides you access to the built-in reports for the monitored channels (e.g., app & web activities, emails, file events, etc.) and analytics (e.g., productivity, behavior alerts, etc.). The report comes with powerful tools such as filters, widgets, etc. that simplify the visualization and analysis of complex data. You can also create custom reports by cloning any of the built-in reports. For more information, check out the BI Reports section of the User Guide.
- *Dashboards*: Allows you to access the built-in dashboards or your own custom dashboards. You can add widgets and customize the dashboards to view data important to you. For more information, check out the Dashboards section of the User Guide.
- *Monitoring*: Allows you to view user activity reports for all the system objects (i.e. Websites, Apps, Emails, Networks) tracked by Teramind. For more information, check out the Monitoring Reports section of the User Guide.
- *Risk*: The Risk report allows you to conduct an organization-wide risk assessment. The report shows the top risky users, rules, and objects (applications and websites). The report also lets you plot risk trends by department, severity, number of violations, tags (tags are used to identify a rule), etc. For more information, check out the Risk section of the User Guide.

- *Productivity*: The Productivity report lets you track employee productivity and performance. It shows productive, unproductive/active/idle time, and how much you are spending on employee wages/salary. For more information, check out the Productivity section of the User Guide.
- *OMNI*: OMNI provides a snapshot view of the most critical insights and incidents about your organization. It's an oversight tool that will help business owners and managers keep an eye on the organization's productivity and security without digging through detailed reports. For more information, check out the OMNI section of the User Guide.
- *Behavior*: The Behavior menu consists of the Policies and Alerts sub-menus. With these features, you can create behavior policies and rules to detect any unproductive, harmful, or dangerous activity, and view all the rule violation alerts. For more information, check out the Behavior section of the User Guide.
- *Employees*: The Employees screen is where all your employees and other users are listed. You can see when a user logged in, which computer they logged in from, their status, and if they are currently being monitored. From this screen, you can also perform actions such as add/import/delete/restore employees, lock/unlock their computers, etc. For more information, check out the Employees section of the User Guide.
- *Computers*: The Computers screen shows all the computers you have added to Teramind, when they were last seen, online counts, current online users/agents, IP addresses, operation systems, and what versions of the Teramind Agent they are using. From this screen, you can also perform actions such as enable/disable monitoring for selected computers, delete/restore, update agents, etc. For more information, check out the Computers section of the User Guide.
- *Configure*: This menu allows you to manage schedules, departments, shared lists, and access control policies. For more information, check out the Configure section of the User Guide.
- *System*: The system menu allows you to find missing users/computers, view the system log, and download previously exported reports. For more information, check out the System section of the User Guide.
- *My Account*: This screen allows you to change your subscription, create a support PIN to request support, and view your Teramind Server details. For more information, check out the My Account section of the User Guide.

2. **Search**

   By clicking the Search  icon, you can search for an employee or computer from anywhere on the Dashboard using the global search feature. For more information, check out the Search section of the User Guide.

3. **Help**

   Click the Help  icon to access help and support resources. It also lets you access the Teramind Wishlist Portal (Feature Request) and the Teramind Academy (Training & Certifications).

4. **User Menu**

By clicking the user's name on top of the Dashboard, you can access the User Menu. It lets you configure the currently logged-in user's profile, download the Agent, manage access tokens for Teramind API, and log out the current user. For more information, check out the User Menu section of the User Guide.

5. **Settings**

   By clicking the Settings icon, you can access the monitoring, integrations, and system settings options. For more information, check out the Monitoring Settings, Integrations, and Settings sections of the User Guide.

6. **Notifications**

   Clicking the Notifications icon will show you the status of recent notifications such as login failures, monitoring issues, etc. For more information, check out the Notifications Report section of the User Guide.

7. **Page Options**

   When the Page Options icon is available (not all reports support this option), you can click it to save the currently displayed screen or print it.

8. **Start Tour**

   Teramind has an interactive guided tour showcasing various use cases. You can use this feature to learn how to utilize several of the Teramind features and capabilities. For more information, check out the Guided Tour section of the User Guide.

9. **Chat Support**

   Click the T icon to access the 24x7 chat support. For more information, check out the My Account > Support section of the User Guide.

4 Additional Configurations

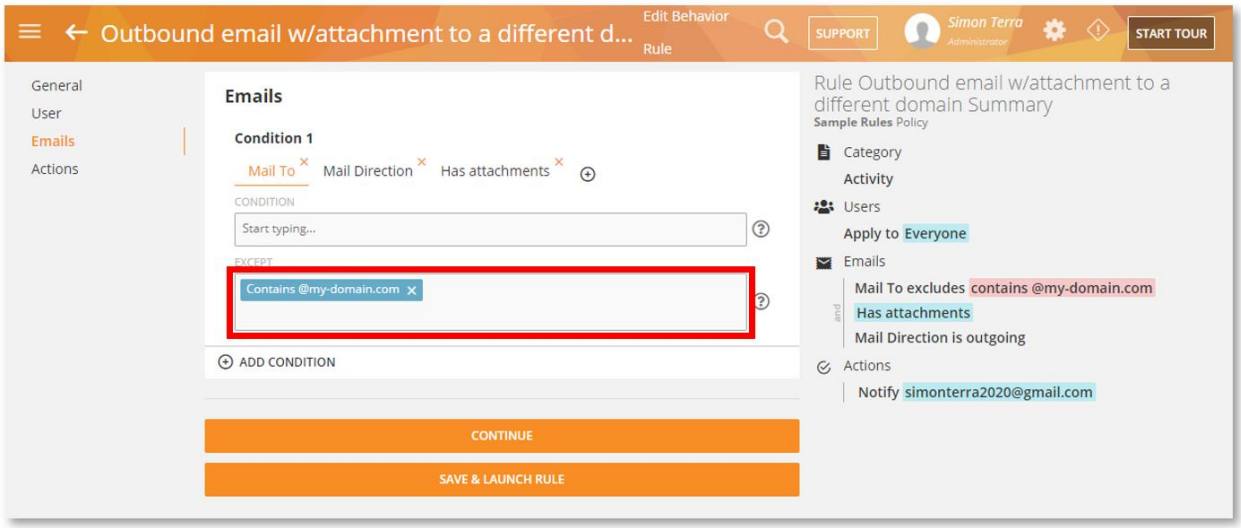
Each customer has their own requirements and use cases, That's the reason, we don't usually provide a standard workflow. Here are some recommendations that might be helpful for you:

1. Add the employees and computers you would like to monitor (if they are using a Revealed Agent).

2. Set up any departments/groups if you need them. This will make it easier to create monitoring profiles or generate reports by department.

3. Adjust the monitoring settings according to your organization's requirements. For example, you can turn video capture on/off, exclude apps/websites you don't want to monitor, etc.

4. Modify any sample policies and rules that came with the package according to your needs. For example, you might see a sample rule named '*Outbound email w/attachment to a different domain*'. You obviously would want to change the *Mail To* condition of the rule to correspond to your company's domain:



If you don't need a rule, just turn it off or delete it. You can learn more about policies and rules in our Rules Guide. We also have many sample rules included in the Rules Guide.

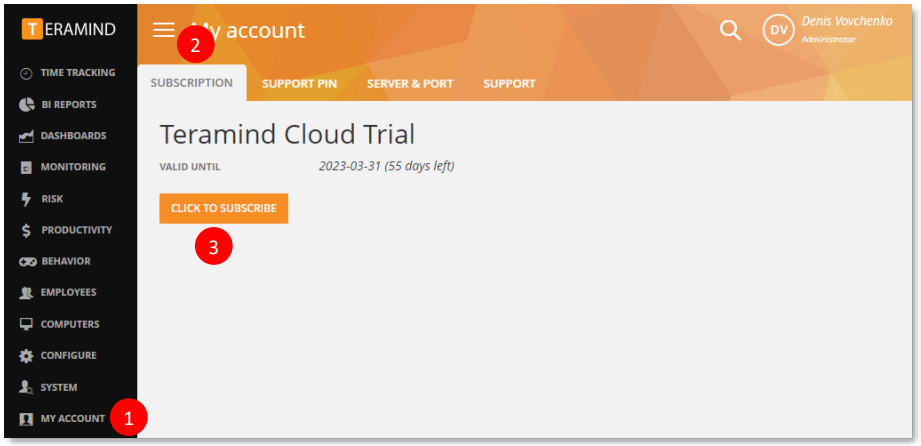
5. Create productivity profiles so that you get an accurate result on the productivity reports.

6. Change the account type or role for your users (optional).

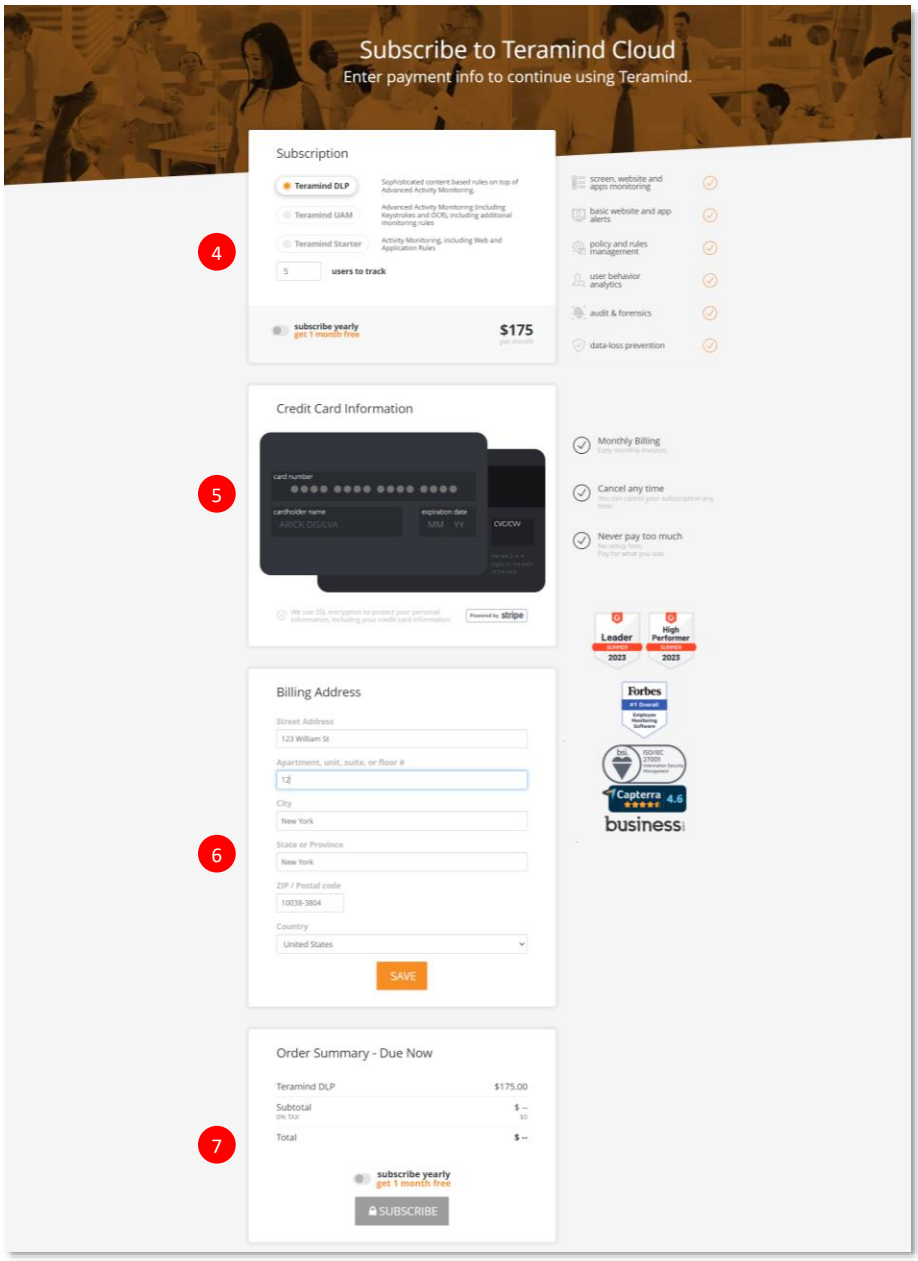
7. Set up schedules if you have hourly employees/contractors etc.

5 Moving from a Trial to a Paid Subscription

You can subscribe to the Teramind paid version from the **MY ACCOUNT** > **SUBSCRIBE** tab:

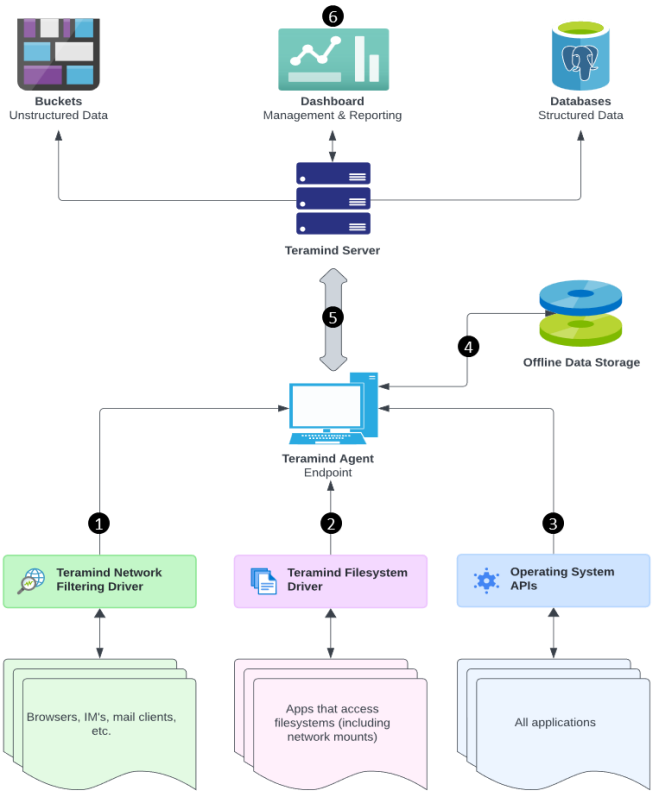


1. Click the **MY ACCOUNT** menu.
2. Select the **SUBSCRIPTION** tab.
3. Click the **CLICK TO SUBSCRIBE** button. It will take you to the *Subscribe to Teramind Cloud* (checkout) screen:



4. Under the *Subscription* section, choose a product type (e.g., Teramind DLP), and enter the number of users to track. You can choose the **subscribe yearly** option for the listed discount.
5. Under the *Credit Card Information*, enter your credit card details.
6. Under the *Billing Address* section, enter your billing address that matches your credit card and click the **SAVE** button.
7. Under the *Order Summary*, review the due amount, and press the **SUBSCRIBE** button.

Architecture



1	Using the network filtering driver (proxy) Teramind Agent is able to analyze all network traffic on the machine. The Agent detects high-level events (emails sent, webpages visited, instance messages, etc.), fetches all meta-information from underlying raw network traffic, and creates monitoring events.
2	Using the filesystem filter driver, Teramind Agent is able to oversee and analyze all file-level operations happening on the computer. The Agent detects high-level events (file created, copied, etc.), fetches all metadata, and creates monitoring events.
3	The Agent uses other OS APIs to oversee application behavior and user activities on the system and generate monitoring events.
4	When there is no direct connection to the server, The Agent stores generated monitoring events in an offline data store. Once the connection is re-established, the Agent reads stored events and pushes them to the server.
5	The Agent streams generated events to the server. Various protocols/ports are used: • Port 443 – HTTPS • Tenant-dependent port - TLS - proprietary protocol (port 10000 in on-premise deployments) • A dynamic range of UDP ports for audio transfer (optional) The Agent also receives configurations, monitoring settings, behavior policies & rules from the server and enforces them to the endpoint.
6	A web-based Dashboard allows admins and privileged users to configure the system and Agent settings, create behavior policies and rules, etc., and view reports.

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 here.*
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	Stealth or revealed desktop agents available
Deployment	• Silent MSI • Deployment via Group Policy or SCCM • Deployment via Microsoft InTune, JAMF, etc.
Bandwidth	Approximately 10 kbps upstream depending on user activity level & number of screens
Offline Storage	Teramind features offline recording on the Stealth Agent (Windows). This means that in case of network downtime, the agent will save all data locally, and continue to enforce the policy. 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. For normal office work with low screen activity, the storage requirements will be up to 1 GB per 8 hours of workday, per user. For more information about storage, check out this article.



Detailed Agent specifications can be found on our Knowledge Base here.

Installation Support and Troubleshooting

If you encounter any issues deploying Teramind Cloud, check out the Troubleshooting and How-To section on the Teramind Knowledge Base. You can also reach our support team via chat/email:

Chat	Click the T icon near the bottom-right corner of the Teramind Dashboard or from the Teramind website: https://teramind.co/
Email	support@teramind.co