

Teramind NextGen

On-Premises Deployment Guide

Ver 1.0 (3 August 2026)

TERAMIND

Quick Start & Deployment Overview

There are 4 key steps to deploying Teramind On-Premises. Steps 2 to 4 are identical no matter which virtualization platform you choose. Click a link to jump to its instructions section:

1 **Setting Up a Virtual Machine (VM)**	This is done on your VMware / Hyper-V / Nutanix environment - either through their client or web interface. Separate instructions are provided for each platform: • Option 1: VMware ESXi 6.7 • Option 2: VMware vSphere • Option 3: Hyper-V • Option 4: Nutanix AHV - OVA Method • Option 5: Nutanix AHV - Unpacked OVA Method
2 **Setting Up the IP, Network and Machine Role(s)**	The instructions are similar for all environments. This is done on a Console interface on the VM. • Setting Up the IP, Network and Machine Role(s)
3 **Setting Up the Account and Finish the Deployment**	This is done from the Teramind Dashboard. • Setting Up the Account and Finishing Deployment
4 **Installing the Teramind Agent**	The Agent can be downloaded from the Teramind Dashboard. • Installing the Teramind Agent

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Teramind On-Premises Overview

Teramind is the world's leading platform for employee monitoring, insider threat detection, data loss prevention and workforce productivity optimization solutions. All Teramind solutions can be deployed On-Premises. This deployment guide will help you discover what you can expect from your Teramind On-Premises deployment and provide you with installation prerequisites, step-by-step instructions, technical, and support information.

Architecture	Self-contained, Linux-based VM
Data Center	Deploy in your own server or a compatible data center
License	User-based. More information on licensing can be found here on our Knowledge Base.
Server	Managed by you, VHD provided by Teramind
Updates	Periodic, single file, uploaded to the dashboard
Backups	Managed by you
Scalability	Horizontally scalable, from 1 to 200,000+ concurrent sessions.
Support	Installation assistance, 24/7 follow-the-sun, enterprise SLA
Additional Options	• Manual/remote/silent agent install options • Active Directory/Group Policy support • SIEM & Project Management software integrations

Benefits of Deploying Teramind On-Premises

Here are some benefits you can expect if you choose to deploy Teramind On-Premises:



Full Control of Your Environment

Use your own infrastructure and only pay for resources you consume (i.e. CPU, storage, memory). Full control of your environment means you can achieve the SLA you need.



Flexible Storage

Choose how much storage you want to be allocated for OCR, user data, and application metadata. The nodes will communicate with the master nodes and each other automatically making storage management easier.



Flexible Deployment Options

Deploy the entire Teramind server with a single OVA/VHD. Support for VMware ESXi, Hyper-V and Nutanix gives you the freedom to deploy Teramind on many environments.



Control Your Own Backup

Control how often and when backups are taken. Teramind On-Premises supports both on-demand and scheduled backups.



Easy Updates

Single file model for security, patch management, and feature deployment. One-click deployment from the dashboard makes it easy to keep your server running smoothly.



Integration

Export data to SIEM, IDS/IPS, and other threat analytics systems via syslog. Active Directory/ integration and REST-based API open up the possibility for coordinated security orchestration.



Security and Compliance

You control all aspects of security and compliance including firewall, SSL, VLAN, SSH tunnels, 2FA, IP whitelisting on your firewall, etc. Your security measures, combined with Teramind's built-in support for HIPAA, GDPR, PCI DSS, and other compliance-specific policy and rules, makes Teramind On-Premises ideal for 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. CPU and system memory should be provisioned based on the expected number of concurrent monitored sessions, according to the following table:

Concurrent Users*	Server Requirements	CPU/RAM Requirements
Up to 100	1 Teramind Master Server (VM)	• CPU: 4 cores • RAM: 16 GB
Up to 500	1 Teramind Master Server (VM)	• CPU: 8 cores • RAM: 16 GB
Up to 1, 000	1 Teramind Master Server (VM)	• CPU: 16 cores • RAM: 24 GB
1001 to 10,000	1 Teramind Master Server (VM)	• CPU: 16 cores • RAM: 32 GB
	1 Teramind App Server (VM) per 1,000 concurrent users	• CPU: 16 cores • RAM: 24 GB
	1 Teramind BI Server (VM)	• CPU: 16 cores • RAM: 32 GB

For deployments over 10,000 concurrent users, please contact us.

**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.*

OCR Server Requirements

Measurements of the workstation and user profiles should be completed during the Proof of Value (POV) to allow the Teramind Solution Engineering team to perform an accurate sizing.

Storage Requirements

Primary Storage	The Teramind virtual appliance comes with a primary volume of 100 GB. This volume contains the Teramind server application and database. The size of this volume can be increased at a later point in time. Teramind requires the primary volume to be on SSD or equivalently fast storage for deployments above 500 users. The BI Classification package requires up to **5 GB** of free disk space, plus approximately **350 MB per 1 million unique URLs** classified in your environment over time. During the update, you will need 2× the current package size for temporary backups. For example, if your existing Teracat database is 4 GB and you have 6 million additional classified URLs (~2 GB), you will need approximately (4 + 2) × 2 = **12 GB** of free disk space to complete the update. Check out this KB article in our Knowledge Base to learn how to update your BI classifications.
Storage for Screen Recordings	The simplest way to add storage is from your hypervisor, by simply adding a second volume. If you use Hyper-V, this volume should be a VHDX file (not VHD). Once adding a second volume, additional steps outlined in this article can be followed to finish provisioning a recording volume. You can also use a NAS or any filesystem over NFS. You can check this article for help. A NAS over NFS is mandatory if you have a multi-server deployment (a deployment that has one or more Teramind App Servers). For help with setting up a NAS check out this article in our Knowledge Base. The size of this second volume can be estimated based on the number of sessions that will be recorded. For normal office work with low screen activity, the storage requirements will be up to 1 GB per 8 hours of workday, per user. This can vary due to multiple factors such as the number of screens, resolution, framerate, color mode, whether audio recording is enabled or not, user's activity level, etc. For more information about storage, check out this article. You can adjust retention policies and recording preferences in the monitoring settings to reduce the storage requirement. This storage is low-access and can be on magnetic / non-SSD media.

	To learn how to attach, mount and expand recording volumes please check out this article on our Knowledge Base.

Installation Prerequisites

Requirements

1. Teramind Server/VM Image **2. Teramind License Key**	All of these are available on the Self-Hosted Portal at: www.teramind.co/portal.
3. Teramind Agent Installer	The Agent installer can be downloaded from the Teramind Dashboard or from the Self-Hosted Portal and deployed remotely.
4. Available IP Address	Supplied by you.
5. Virtualization Environment	Supplied by you. Teramind supports the following virtualization platforms in production: • VMware ESXi 6 and later • Hyper-V • Nutanix AHV.
6. Endpoint Requirements	Detailed Agent specifications can be found here in our Knowledge Base.

> The following deployment instructions are for a single-node setup (deployment without any App Server). Please check out this article on our Knowledge Base for help on multi-node deployments.

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 sessions listing, Teramind uses WebSocket. Although the WebSocket 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 audio recording is enabled, Teramind Agent will connect to the server on a random UDP ports 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. You can also check this article for more information about required ports.

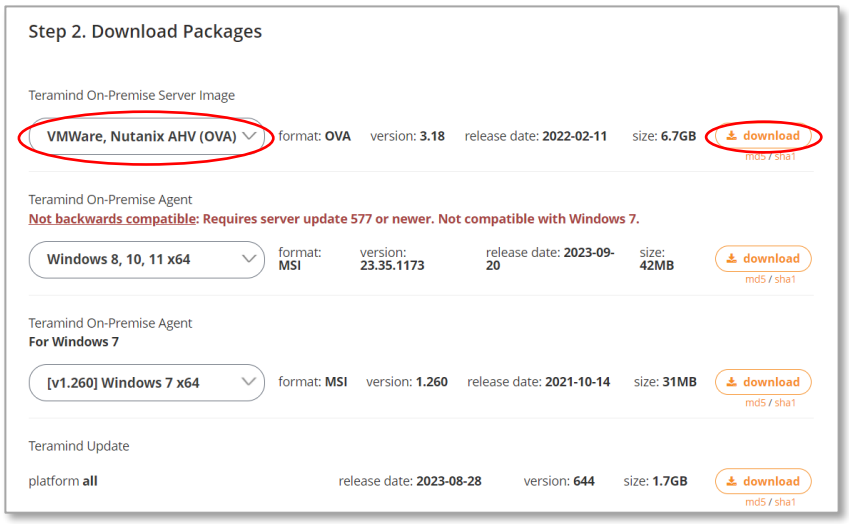
Antivirus Considerations

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 & EDR Configuration Guide for help.

Setting Up a Virtual Server

1 Option 1: Setting Up a Virtual Server with VMware ESXi 6.7 Web Interface

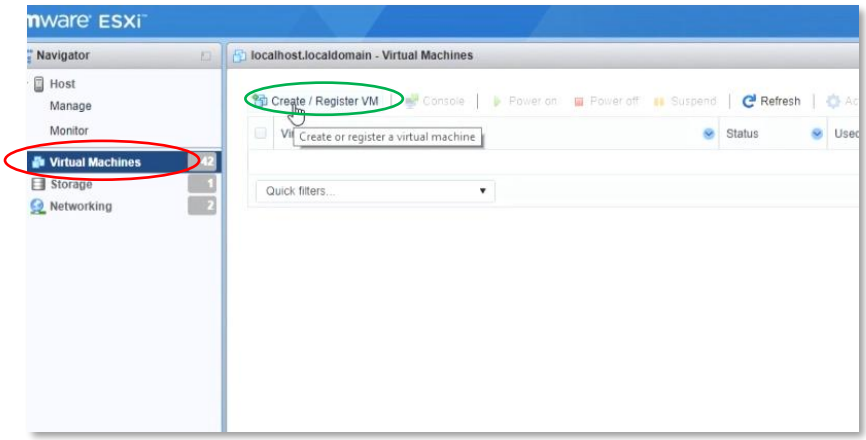


1.1 Downloading the VM Image

Go to the **Download** section of the Teramind Self-Hosted Portal.

Scroll down to the *Step 2: Download Packages* section.

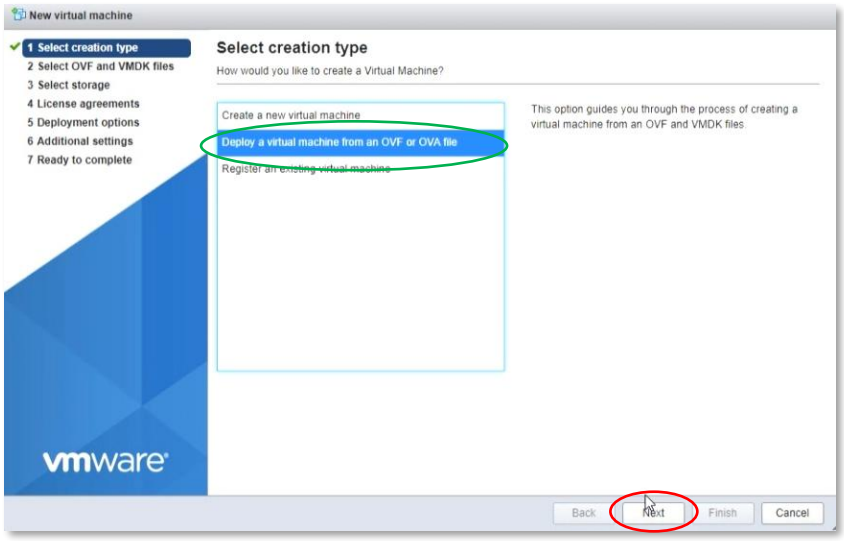
Select **VMWare, Nutanix AHV (OVA)** from the *Teramind On-Premises Server Image* drop-down list and click the **download** button to download the OVA file. You will need this file in Step 1-4.



1.2 Creating the VM

From the VMware main interface, under the Navigation tab on the left, select **Virtual Machines**.

From the right side of the screen, click the **Create / Register VM** button.

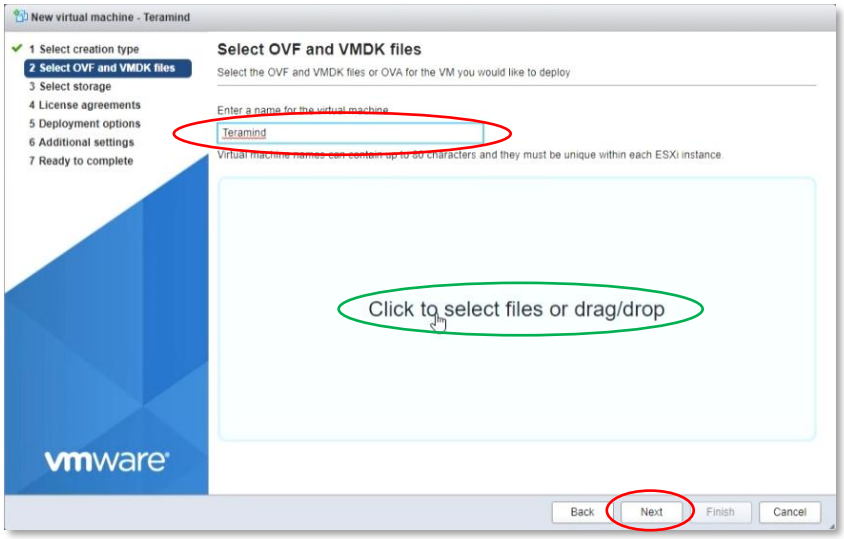


1.3 Selecting the VM Type

A window will pop up where you can specify settings for the new virtual machine you are about to create.

For the first screen, *Select creation type*, select **Deploy a virtual machine from an OVF or OVA file** option.

Click the **Next** button to continue.

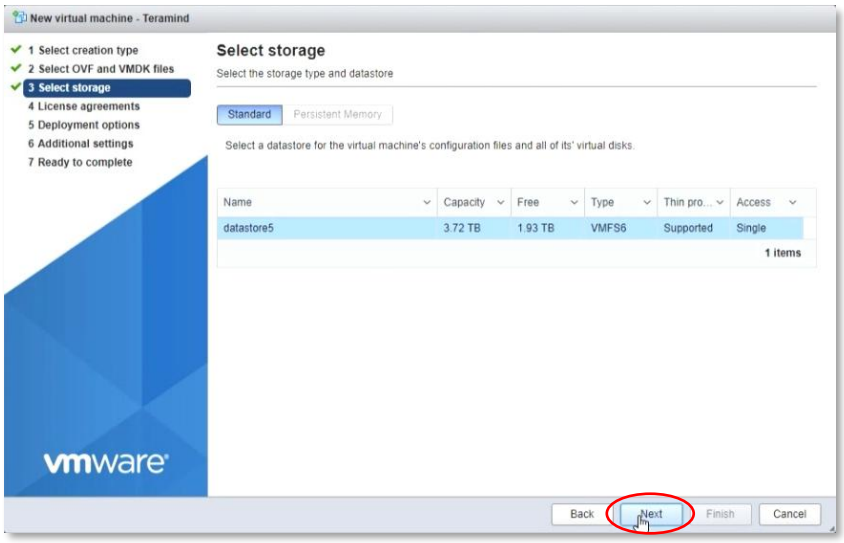


1.4 Deploying the OVF/OVA File

Here, enter a name for your virtual machine. For example, '**Teramind**'.

Then click the area that says, **Click to select files or drag/drop** to upload the Teramind Server OVA file you downloaded in Step 1-1.

Click the **Next** button to continue.

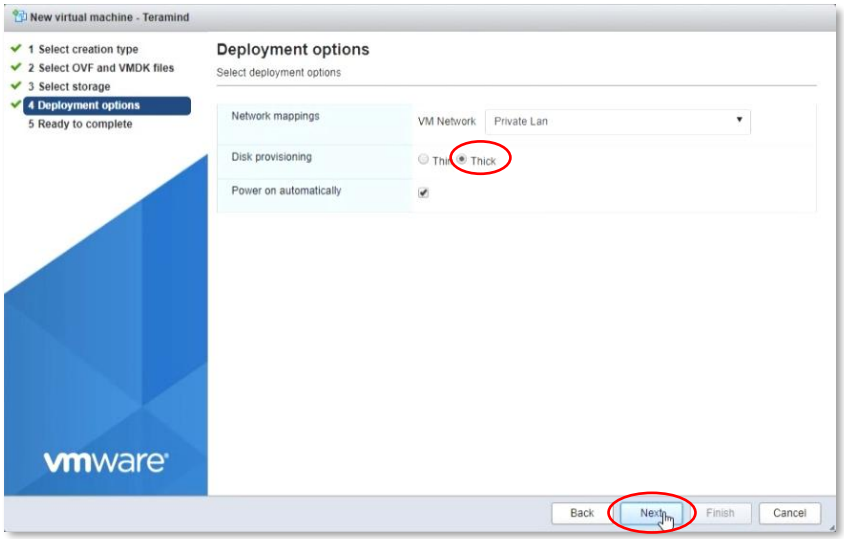


1.5 Selecting the Storage

For now, you can keep the default settings as-is for the *Select storage* screen.

We will add a second hard disk later for the screen recordings (Step 1-13).

Click the **Next** button to continue.

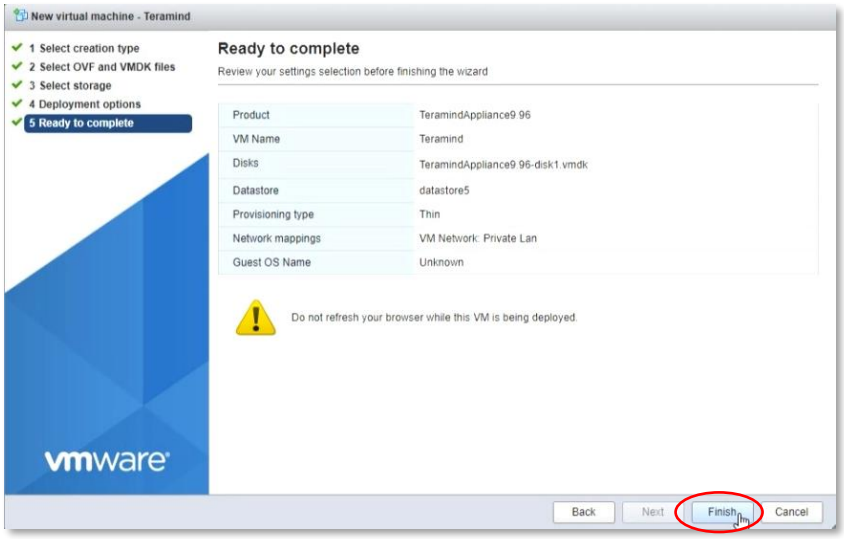


1.6 Specifying the Deployment Options

Select **Thick** for the *Disk provisioning* option.

You can keep the default settings as-is for the rest of the options.

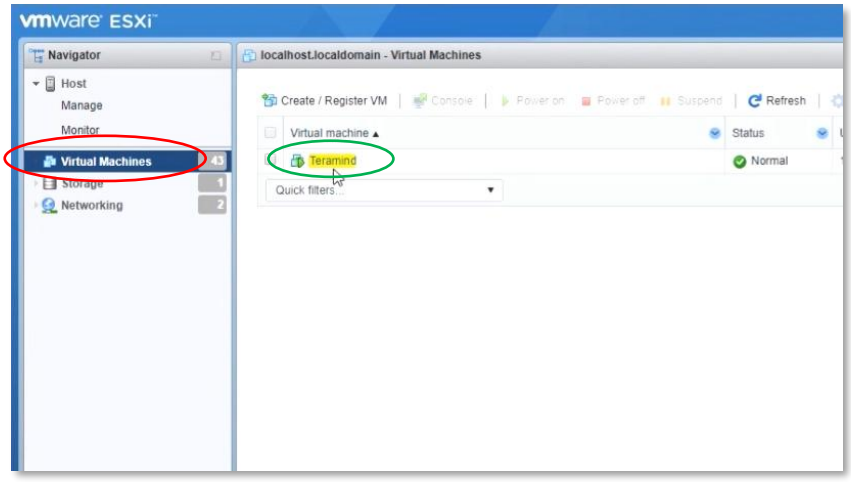
Click the **Next** button to continue.



1.7 Completing the VM Creation

On the *Ready to complete* screen, you can see a summary of your VM's settings. Click the **Finish** button to start the VM deployment process.

Do not refresh your browser while the VM is being deployed.

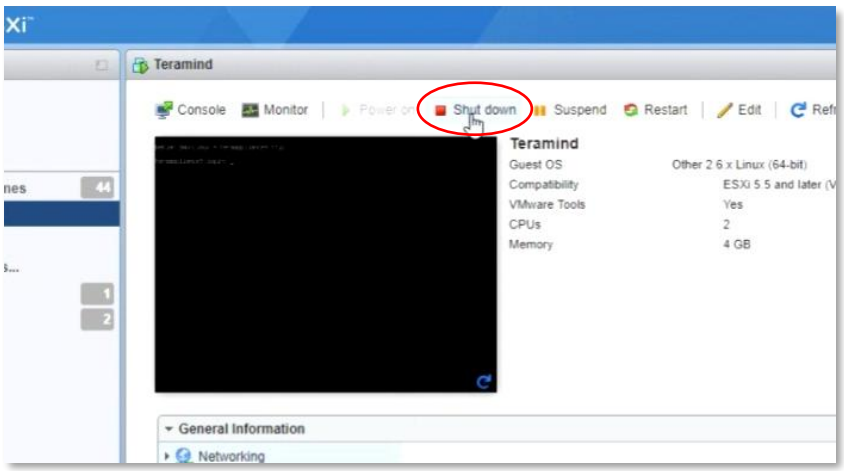


1.8 Accessing the VM's Settings

Once the deployment is finished, you can see your newly created VM 'Teramind' on the main ESXi interface under the **Virtual Machines** tab.

We will now add a second volume to hold the screen recordings.

Click the VM **Teramind** to access its settings.

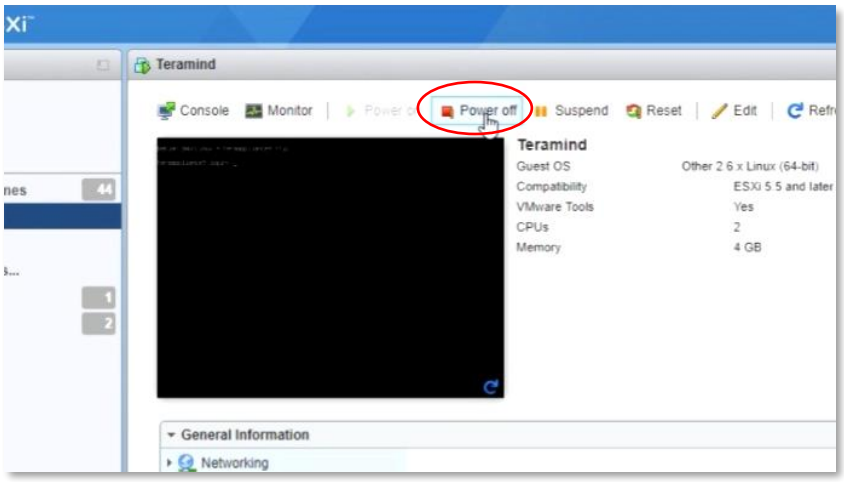


1.9 Shutting Down the VM

If the VM is running, click the **Shut down** button to shut it down first.

Wait until the VM is shut down.

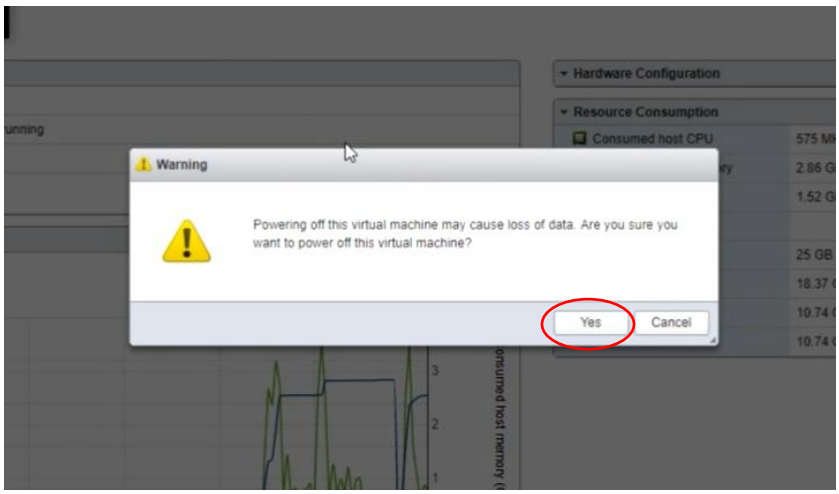
If the VM is already shut down, you can skip this step.



1.10 Powering Off the VM

Click the **Power off** button to power off the VM.

If the VM is already powered down, you can skip this step.

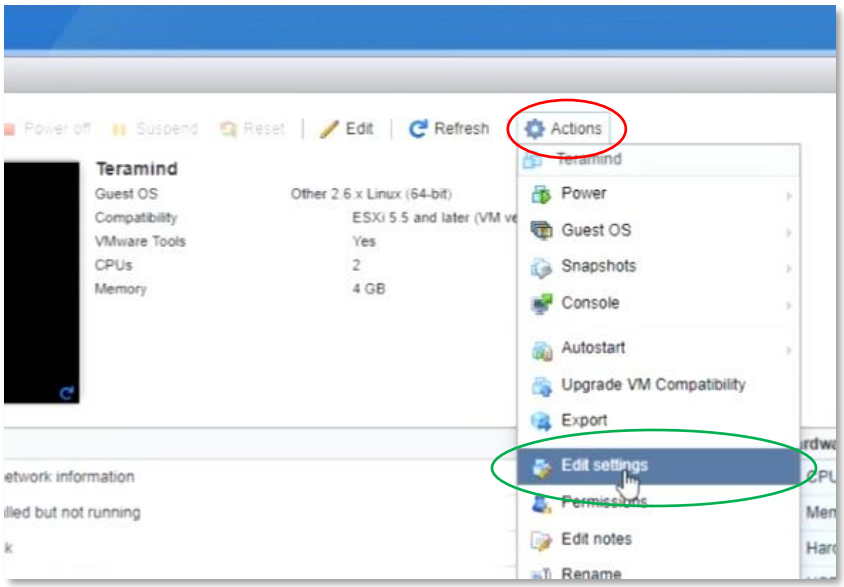


1.11 Confirming the VM Power Off

You might see a warning message saying powering off the VM may cause data loss. Since our VM is brand new, we don't have to worry about that.

Click **Yes** to continue.

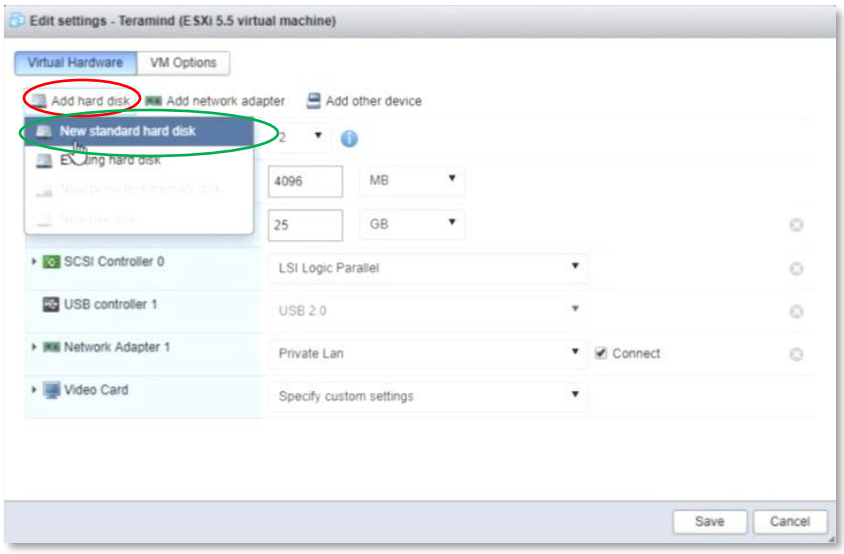
Wait until the VM is powered off.



1.12 Adding New Hardware

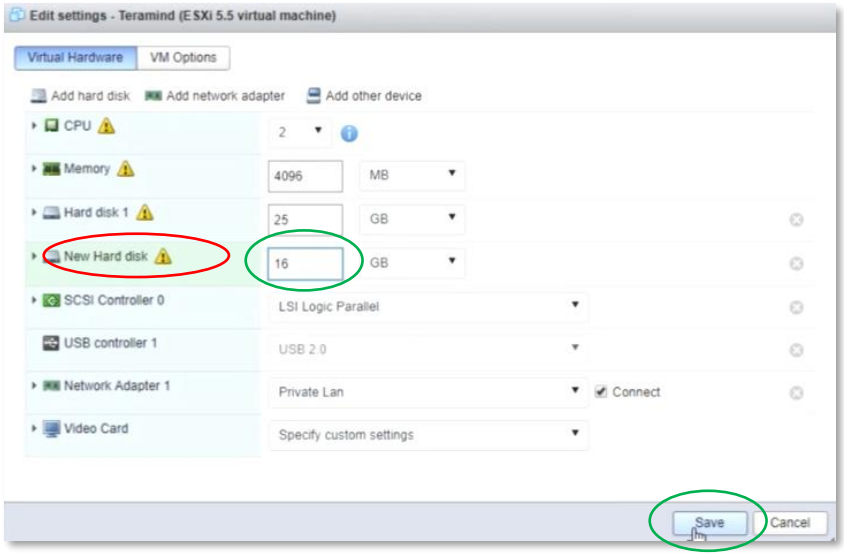
Click the **Actions** button on the top-right corner. Select **Edit settings** from the pop-up menu.

A new window will pop up where you can configure and add/remove hardware for your VM.



1.13 Adding a New Hard Disk

Under the *Virtual Hardware* tab, click the **Add hard disk** button then select **New standard hard disk**.



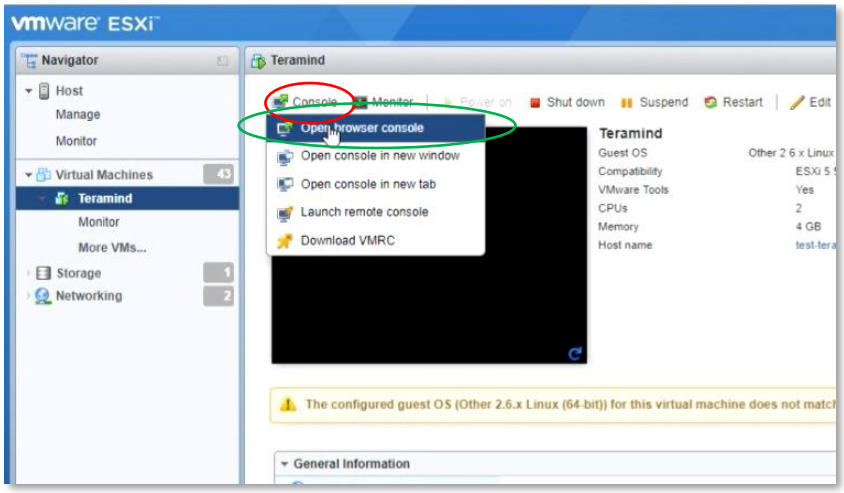
1.14 Changing the Size of the Hard Disk

You will see the new hard disk appear on the list of hardware on the left side of the window.

Click the **New Hard disk**. You can adjust its **size** on the right. You can start with a small size (i.e. 16 GB) and then increase as needed.

Click the **Save** button.

> *Please check the Storage for Screen Recordings section under the Storage Requirements section for more information on storage requirements.*



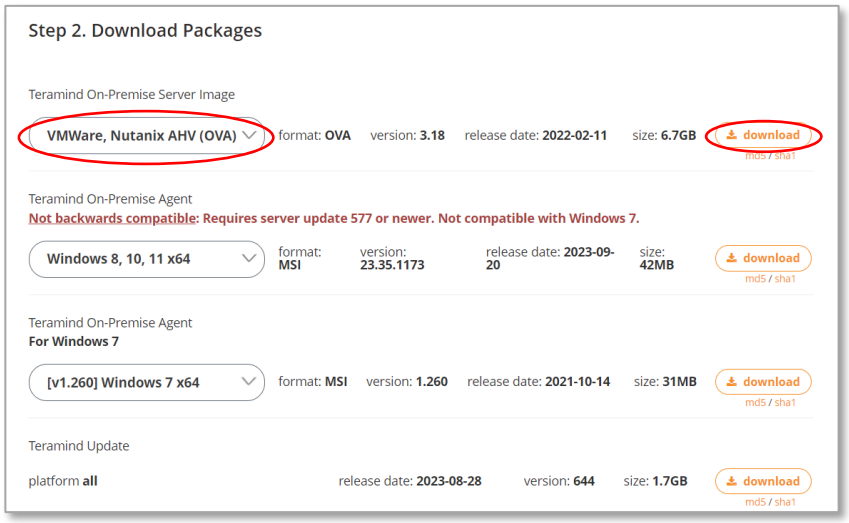
1.15 Preparing for Step 2

Back on the main interface, click the **Console** button on top and select **Open browser console**.

Once the console window opens, you will be able to set up the IP, network and assign machine role(s).

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue with the deployment process.

1 Option 2: Setting Up a Virtual Server with VMware vSphere Client

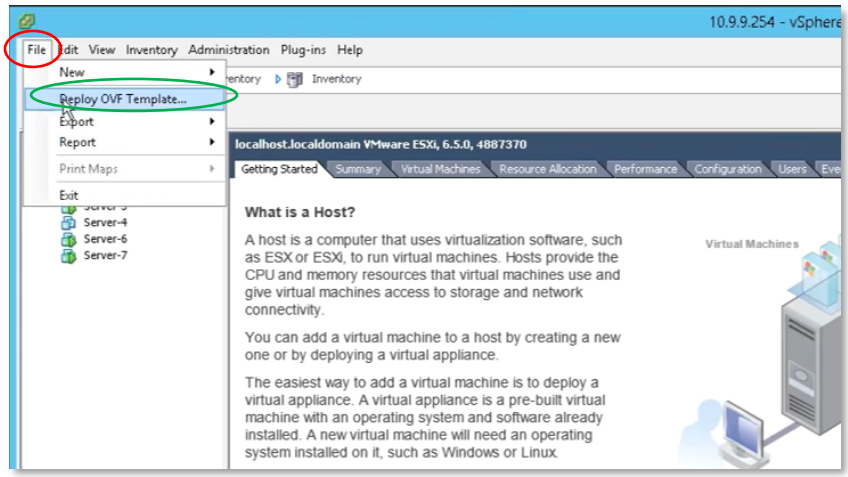


1.1 Downloading the VM Image

Go to the **Download** section of the Teramind Self-Hosted Portal.

Scroll down to the *Step 2: Download Packages* section.

Select **VMWare, Nutanix AHV (OVA)** from the *Teramind On-Premises Server Image* drop-down list and click the **download** button to download the OVA file. You will need this file in Step 1-2.

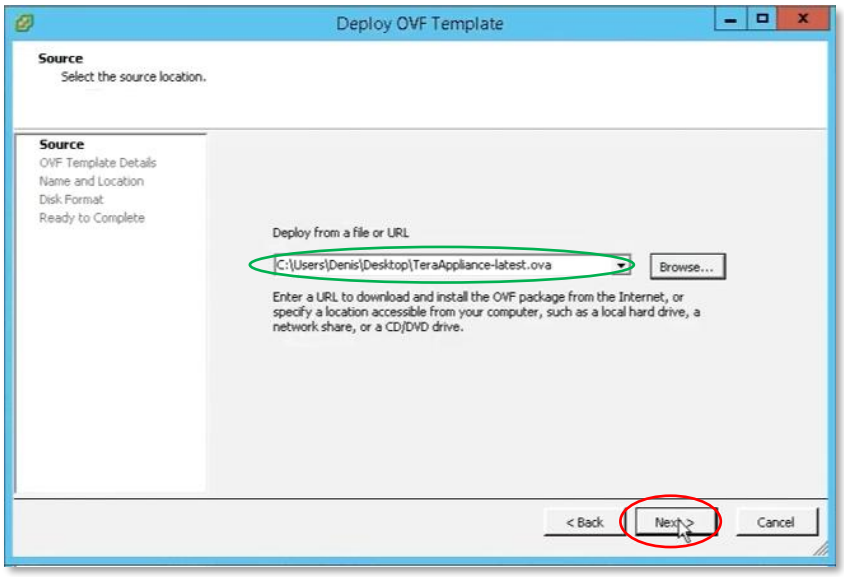


1.2 Deploying the OVF/OVA Template

From the vSphere client interface, click the **File** menu and select **Deploy OVF Template**…

When prompted, select the Teramind Server OVA file you downloaded in Step 1-1.

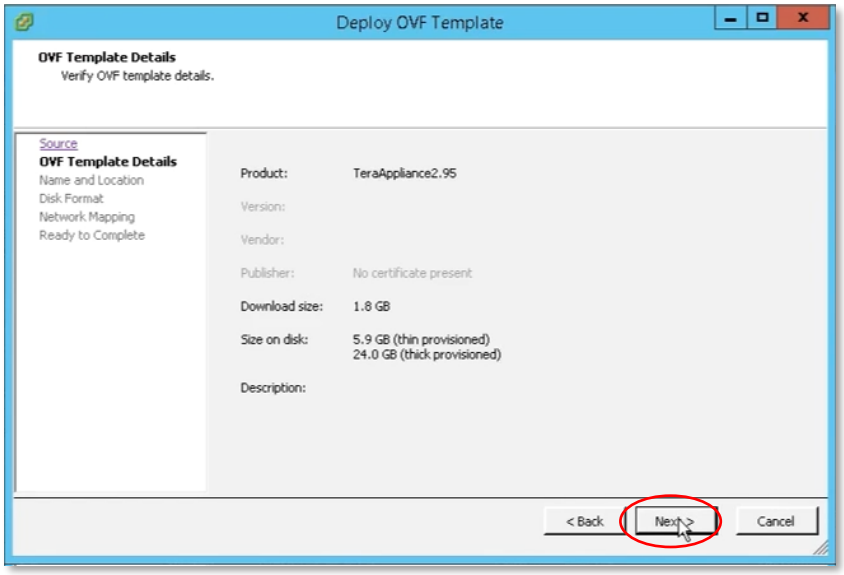
The *Deploy OVF Template* window will pop up.



1.3 Selecting the OVF/OVA Template Source

The first screen on the *Deploy OVF Template* window is called *Source*. On this screen, the **Deploy from a file or URL** box should already be populated by the OVA file path you selected in Step 1-2. If not, you can click the **Browse…** button to load the file again.

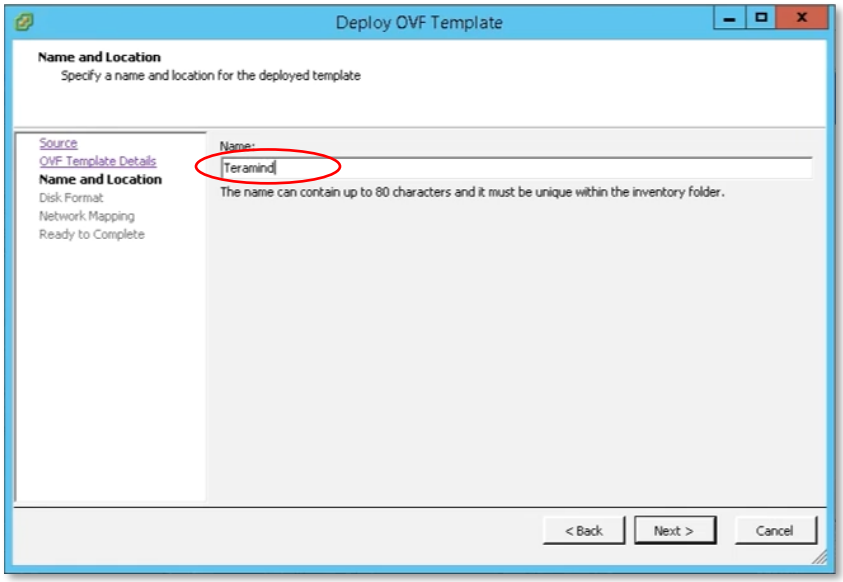
Click the **Next** button to continue.



1.4 Viewing the OVF/OVA Template Details

We can keep the default settings as-is for the *OVF Template Details* screen.

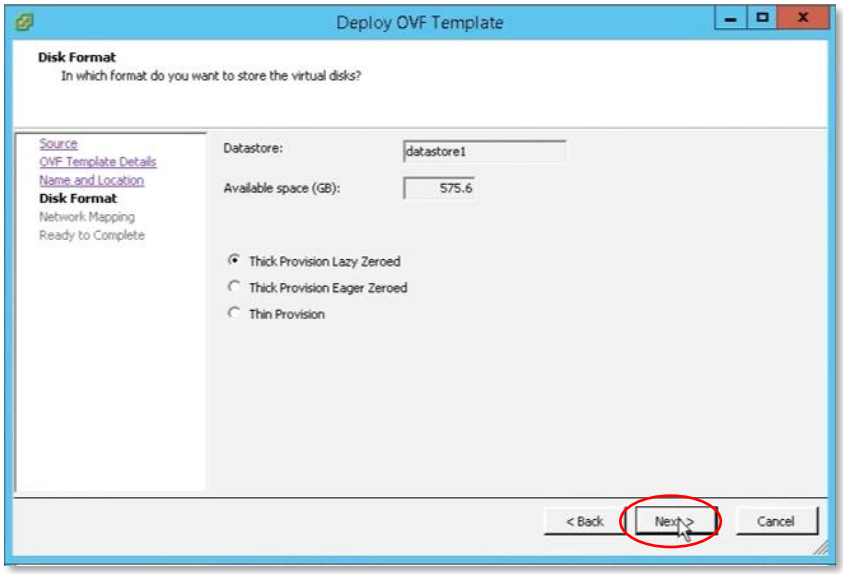
Click the **Next** button to continue.



1.5 Setting the Template Name and Location

On the *Name and Location* screen, enter a name for your virtual machine. For example, **Teramind**.

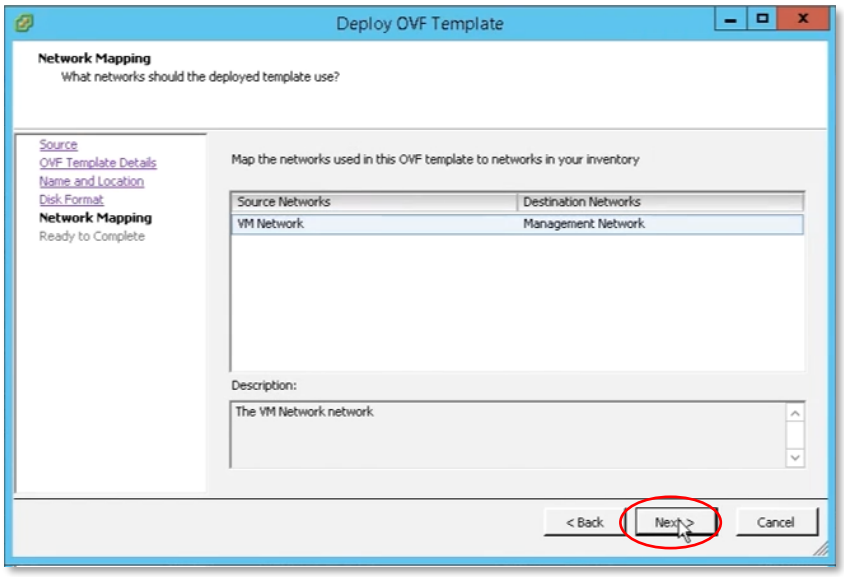
Click the **Next** button to continue.



1.6 Changing the Disk Format

We can keep the default settings as-is for the *Disk Format* screen.

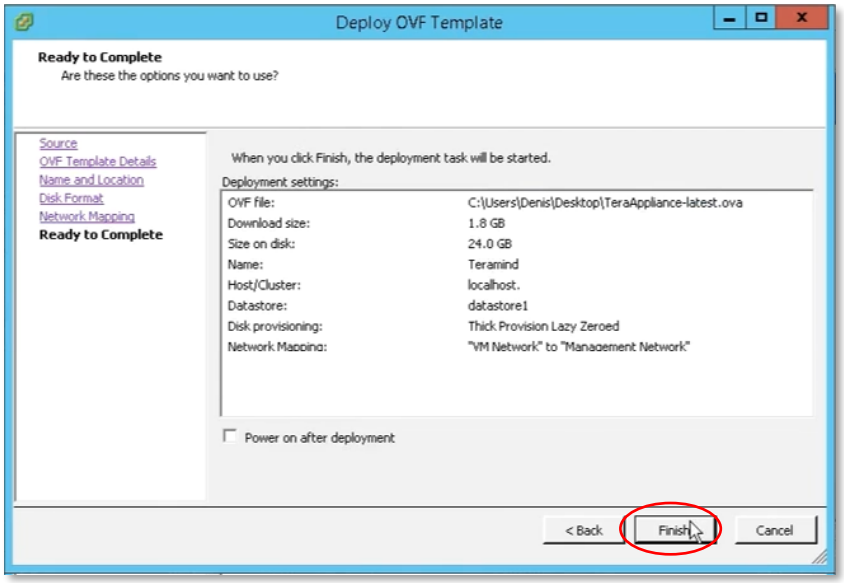
Click the **Next** button to continue.



1.7 Changing the Network Mapping

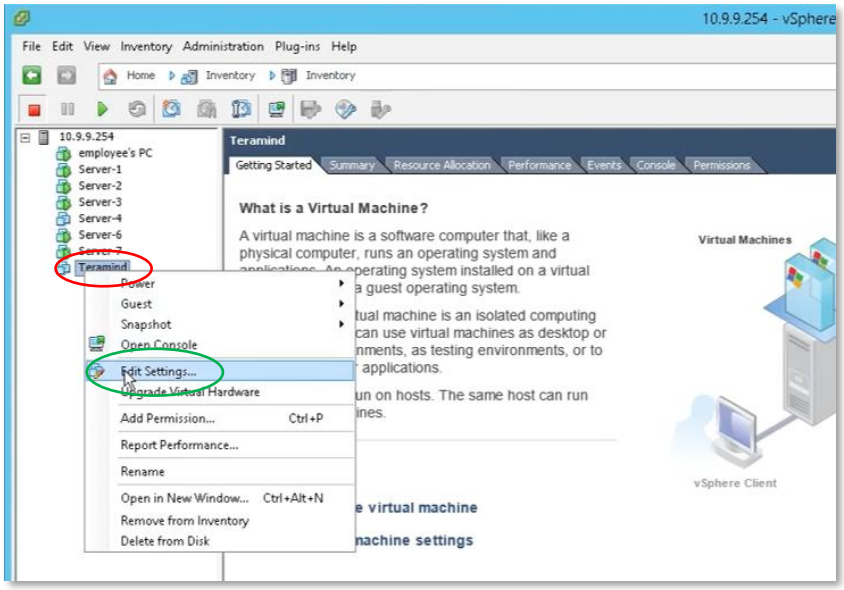
We can keep the default settings as-is for the *Network Mapping* screen.

Click the **Next** button to continue.



1.8 Completing the VM Creation

On the *Ready to Complete* screen, you can see a summary of your VM's settings. Click the **Finish** button to start the VM deployment process.



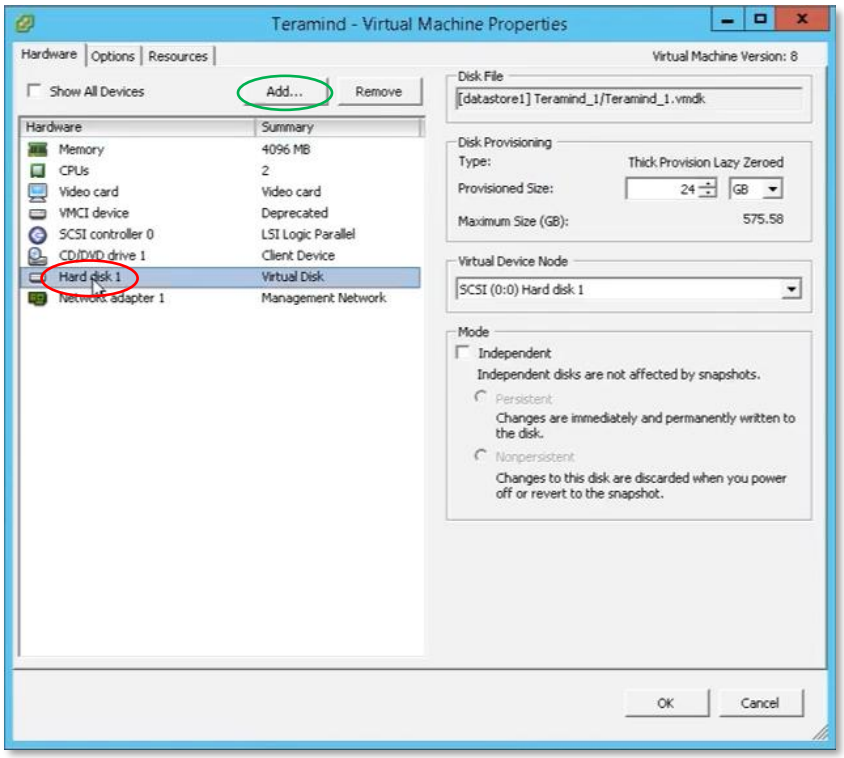
1.9 Accessing the VM's Settings

Once the deployment is finished, you can see your newly created VM, **Teramind** on the main vSphere interface, on the list of servers.

We will now add a second volume to hold the screen recordings.

Right-click the Teramind server and select **Edit Settings…** from the pop-up menu.

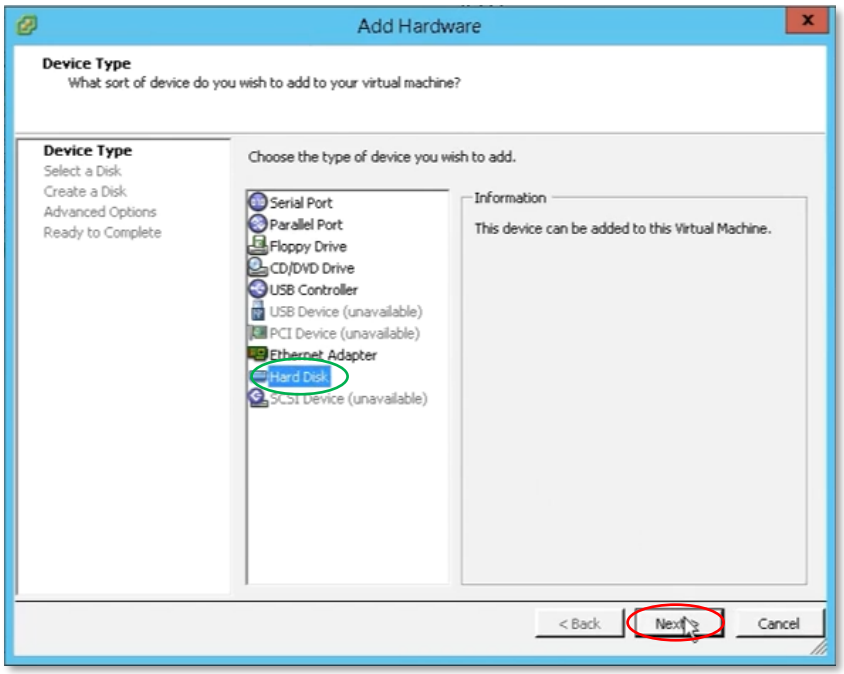
The *Virtual Machine Properties* window will open.



1.10 Adding New Hardware

On the *Virtual Machine Properties* window, click under the *Hardware* tab and you will see a list of existing hardware. Select **Hard disk 1**, then click the **Add…** button on top.

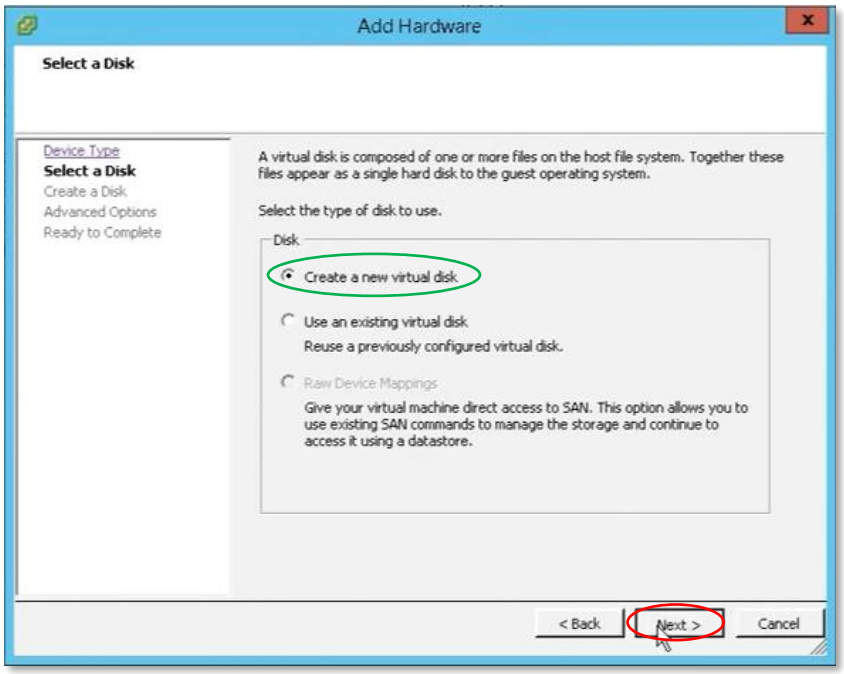
The *Add Hardware* window will open.



1.11 Selecting the Device Type

On the first screen, *Device Type* of the *Add Hardware* window, select **Hard Disk**.

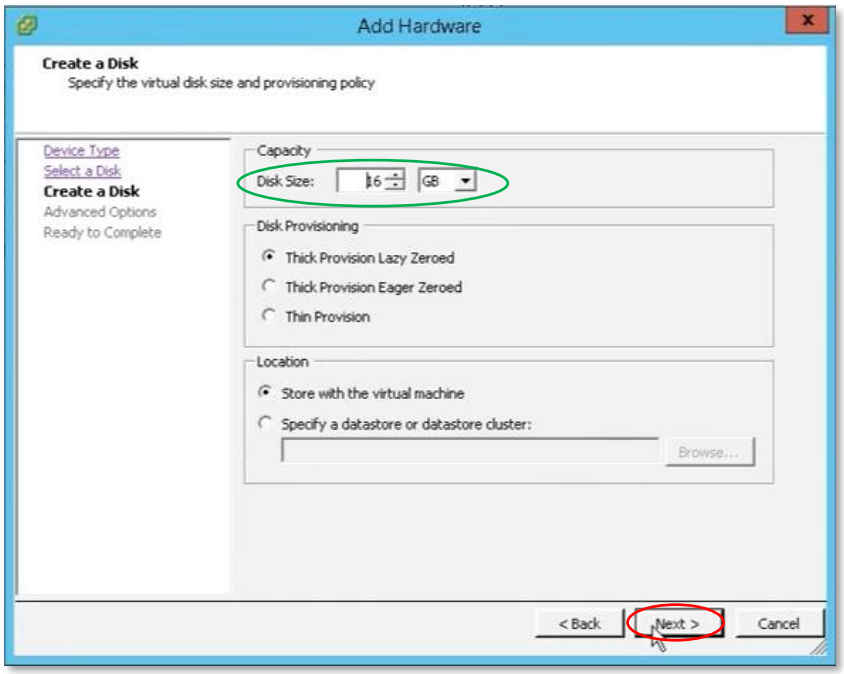
Click the **Next** button to continue.



1.12 Creating a New Virtual Disk

On the *Select a Disk* screen, make sure the **Create a new virtual disk** option is selected.

Click the **Next** button to continue.

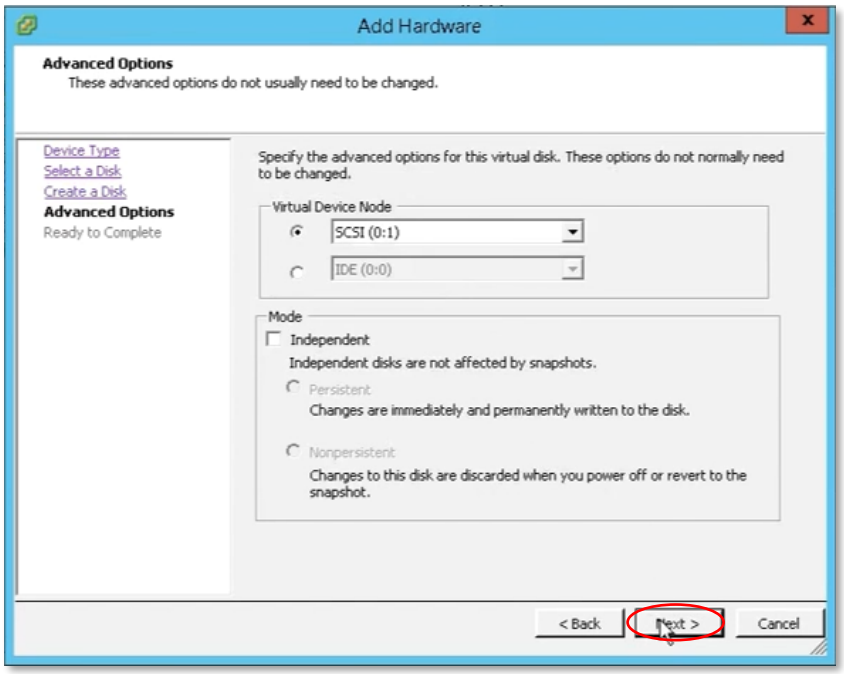


1.13 Configuring the Hard Disk

On the *Create a Disk* screen, you can adjust the disk parameters or keep them as-is. For the **Disk Size** parameter, you can start with a small allocation (for example 16 GB) and then increase as needed.

> *Please check the Storage for Screen Recordings section under the Storage Requirements section for more information on storage requirements.*

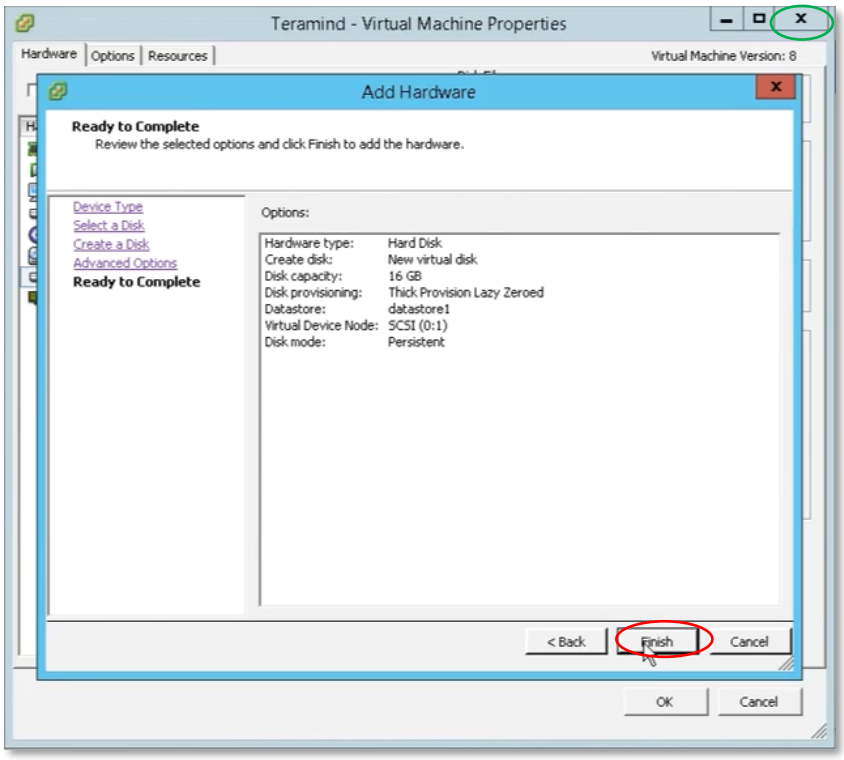
Click the **Next** button to continue.



1.14 Changing the Advanced Options of the Hard Disk

You can keep the default settings as-is for the *Advanced Options* screen.

Click the **Next** button to continue.



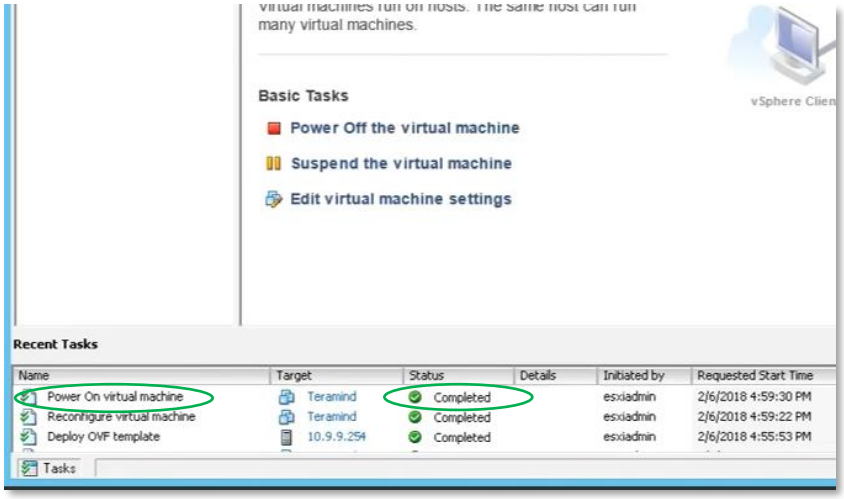
1.15 Finishing the Add Hardware Step

The Ready to Complete screen will show a summary of your disk.

Click the **Finish** button to finish setting up the disk.

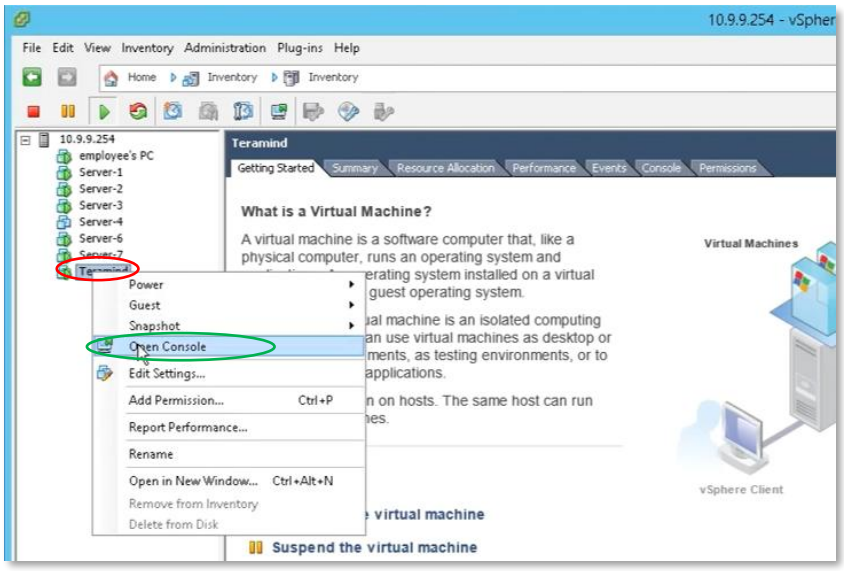
Close the *Virtual Machine Properties* window to go back to the main vSphere interface.

Next, we will power up the virtual machine.



1.16 Powering Up the VM

You can see the **status** of the machine under the *Recent Tasks* list.



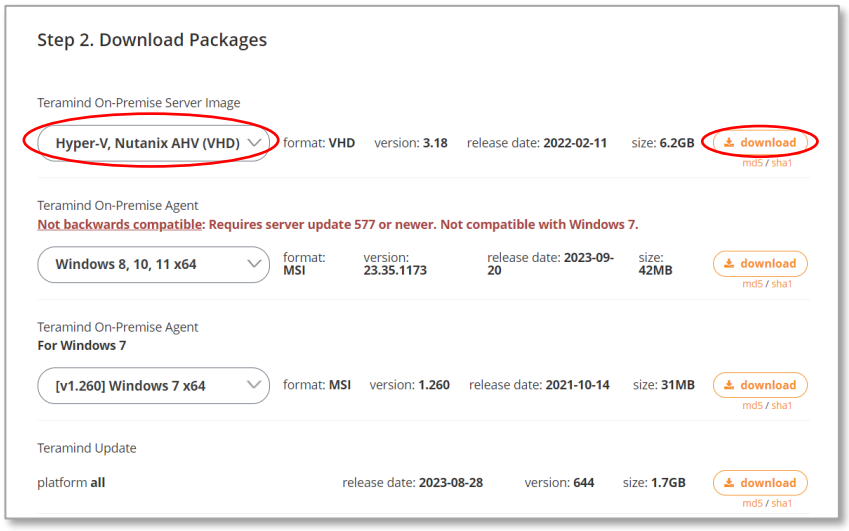
1.17 Preparing for Step 2

Once the VM is powered up, right-click the VM **Teramind** and select **Open Console** from the pop-up menu.

Once the console window opens, you will be able to set up the IP, network and assign machine role(s).

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue with the deployment process.

1 Option 3: Setting Up a Virtual Server with Hyper-V

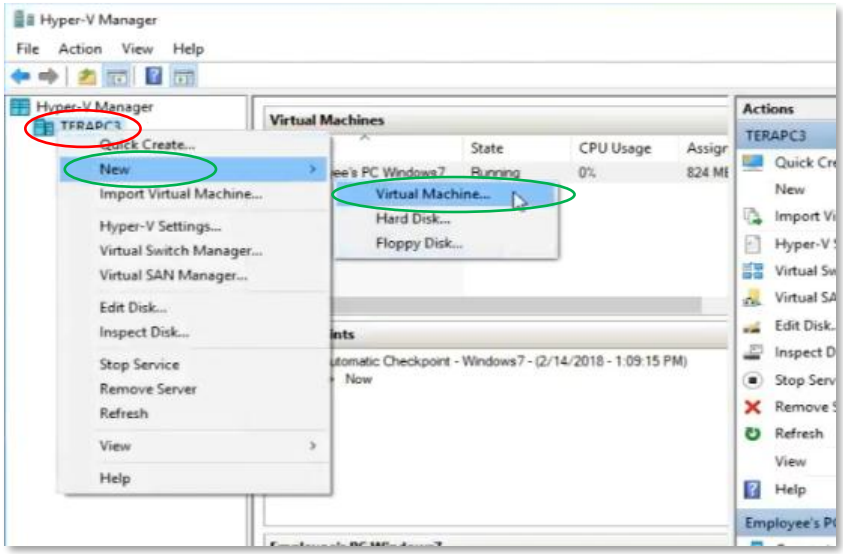


1.1 Downloading the VM Image

Go to the **Download** section of the Teramind Self-Hosted Portal.

Scroll down to the *Step 2: Download Packages* section.

Select **Hyper-V, Nutanix AHV (VHD)** from the *Teramind On-Premises Server Image* drop-down list and click the **download** button to download the VHD file. You will need this file in Step 1-8.

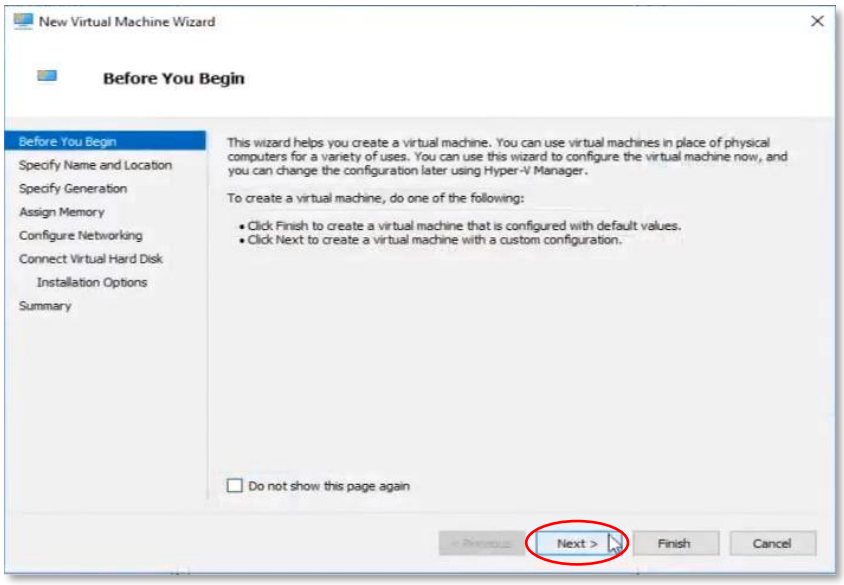


1.2 Creating the VM

From the Hyper-V Manager interface, in the left pane, right-click on the **Hyper-V host** that you wish to host the new virtual machine.

From the pop-up menu, select **New** then **Virtual Machine…**

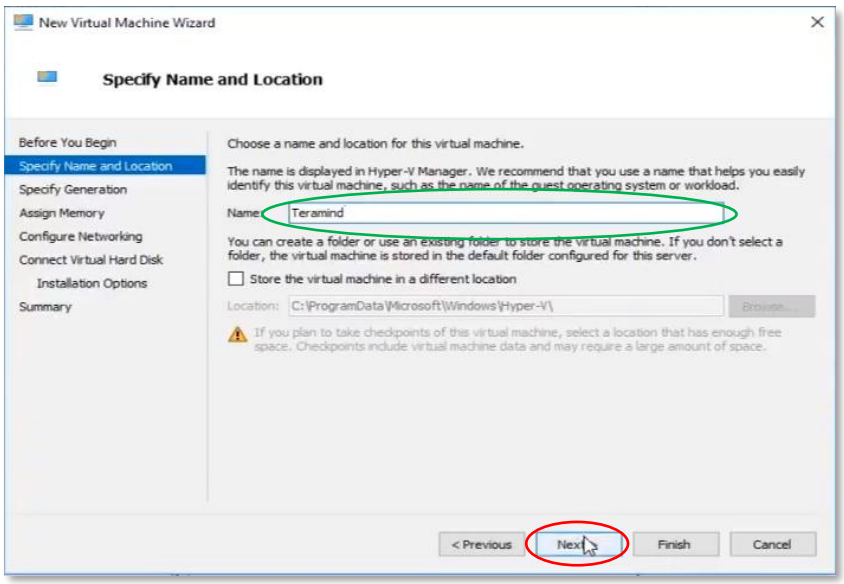
A *New Virtual Machine Wizard* window will appear.



1.3 Getting Started with the VM Wizard

You can skip the first screen *Before You Begin* on the *New Virtual Machine Wizard* window.

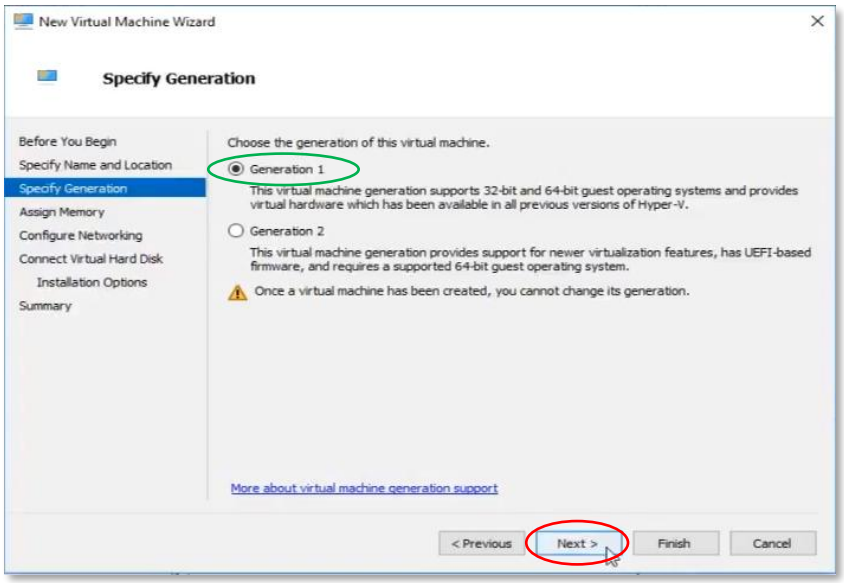
Click the **Next** button to continue.



1.4 Specifying the VM Name and Location

On the *Specify Name and Location* screen, enter a name for your virtual machine. For example, **Teramind**.

Click the **Next** button to continue.

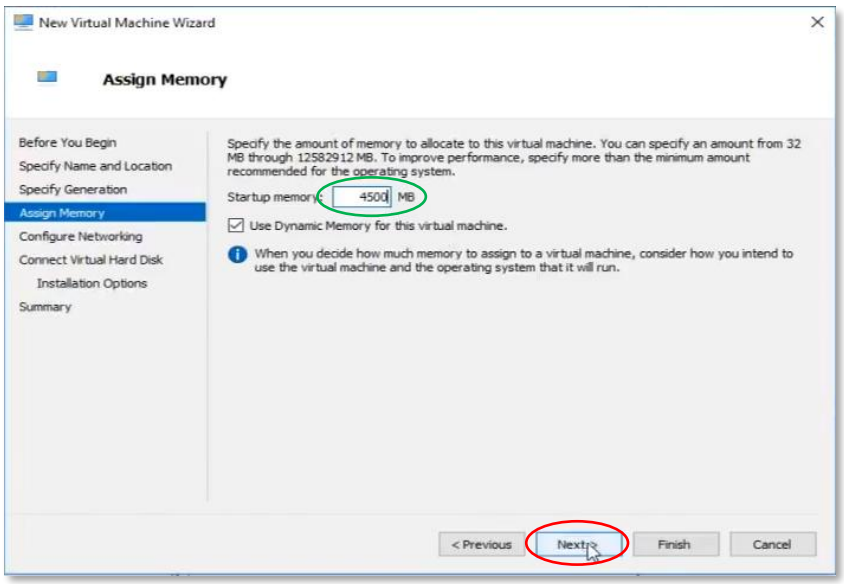


1.5 Specifying the VM Generation

On the *Specify Generation* screen, select **Generation 1**.

Click the **Next** button to continue.

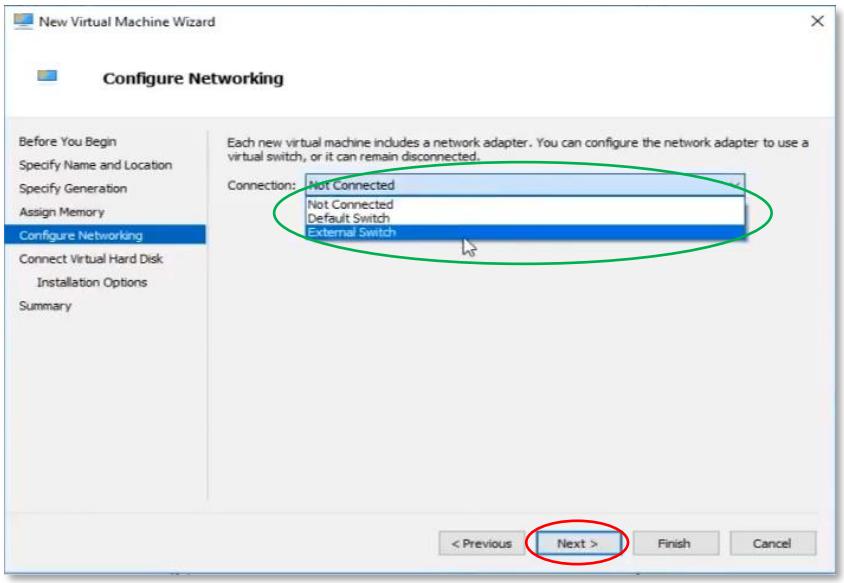
> *You have to use the Generation 1 VM type, otherwise, you won't be able to attach a VHD disk to it.*



1.6 Assigning the VM Memory

On the *Assign Memory* screen, you can enter the **Startup memory**. You can use the Primary Server Requirements section to get an idea. For this tutorial, we will use 4500 MB or about 4 GB.

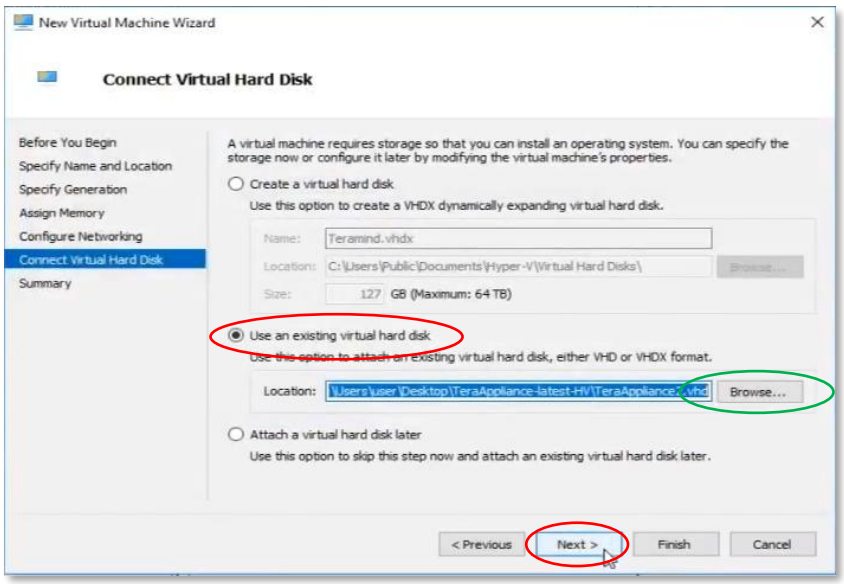
Click the **Next** button to continue.



1.7 Configuring the Network

On the *Configure Networking* screen, you can choose your network connection. Select **External Switch** from the *Connection* list.

Click the **Next** button to continue.

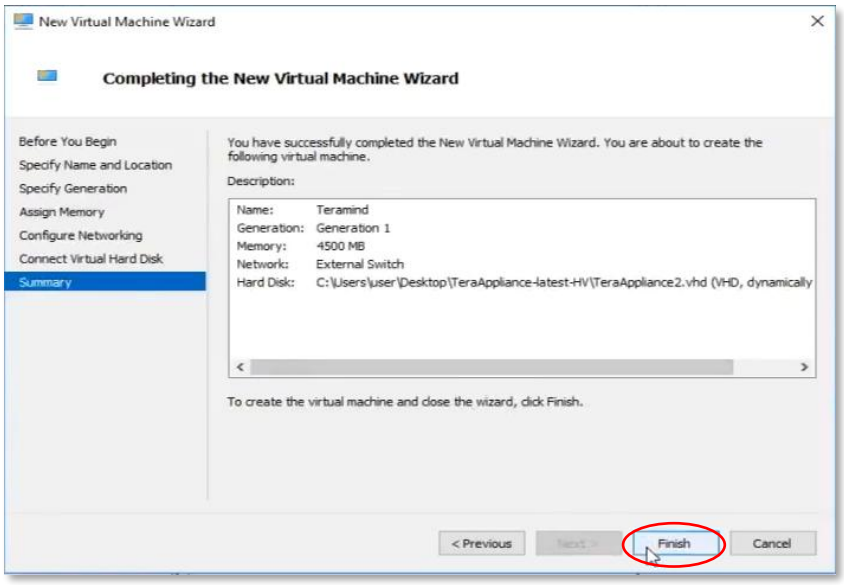


1.8 Connecting a Virtual Hard Disk

On the *Connect Virtual Hard Disk* screen, select the **Use an existing virtual hard disk** option and then click the **Browse…** button.

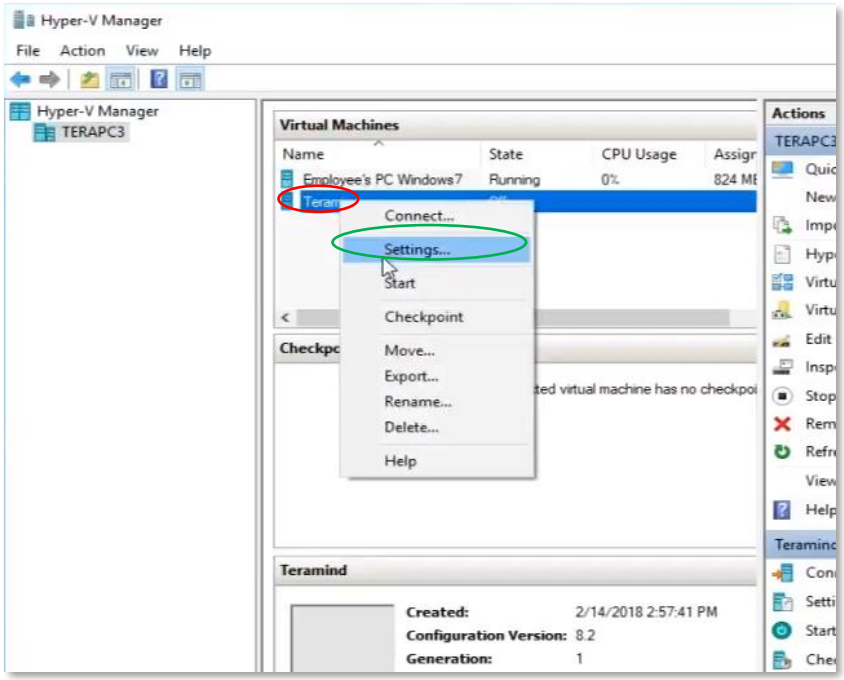
When prompted, select the Teramind Server VHD file you downloaded in *Step 1.1 Downloading the VM Image*.

Once the file is loaded, click the **Next** button to continue.



1.9 Finishing the VM Deployment

On the *Summary* screen, you can see a summary of your VM's settings. Click the **Finish** button to start the VM deployment process.



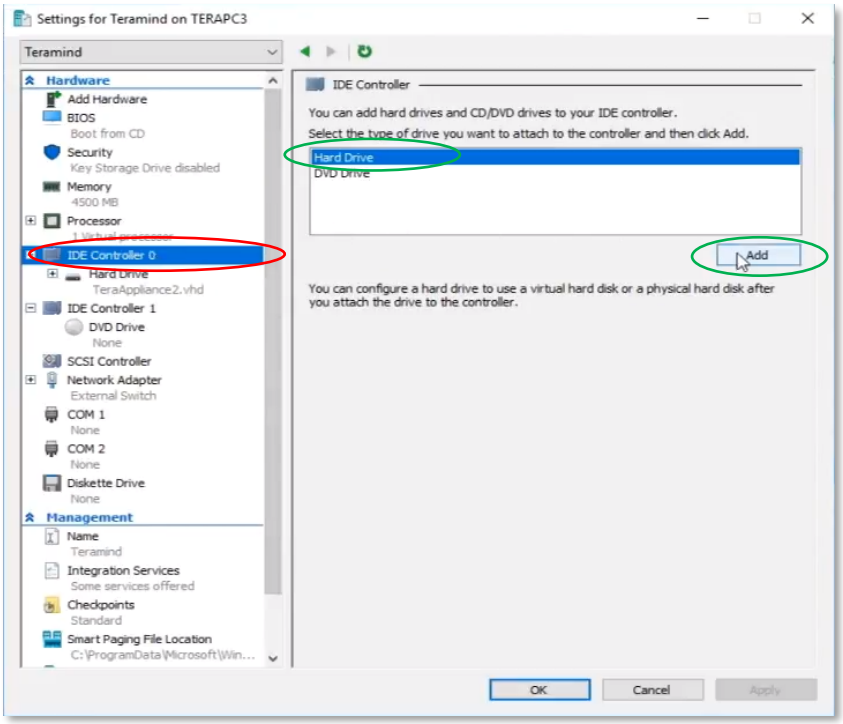
1.10 Accessing the VM's Settings

Once the deployment is finished, you can see your newly created VM, **Teramind** on the main Hyper-V Manager interface, under the *Virtual Machines* panel.

We will now add a second volume to hold the screen recordings.

Right-click the Teramind VM and select **Settings…** from the pop-up menu.

The VM *Settings for Teramind on [your VM host name]* window will open.

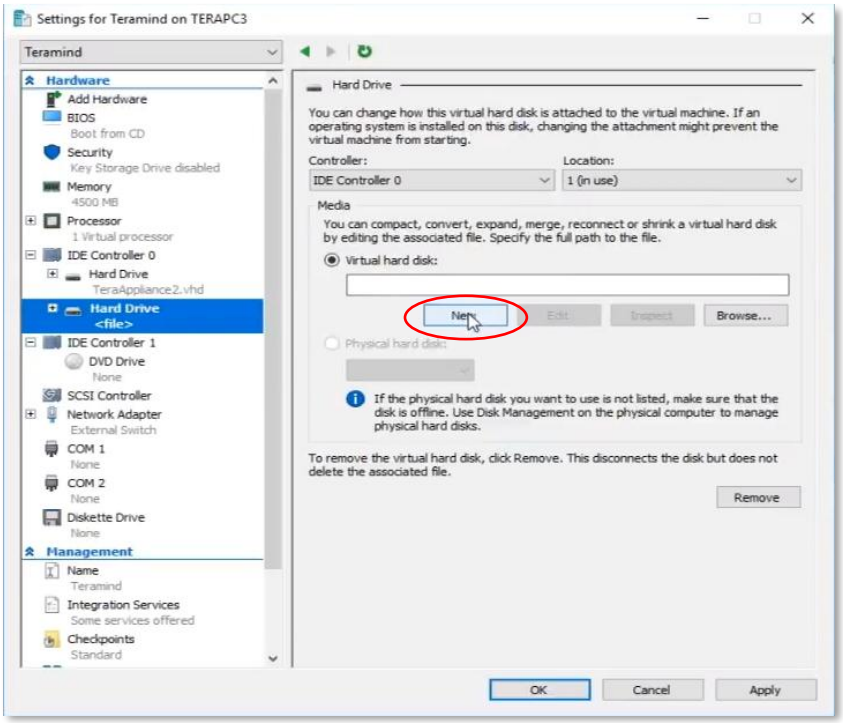


1.11 Adding an IDE Controller

Select the **IDE Controller 0** from the list of hardware on the left panel.

Then, on the right, select **Hard Drive** and click the **Add** button.

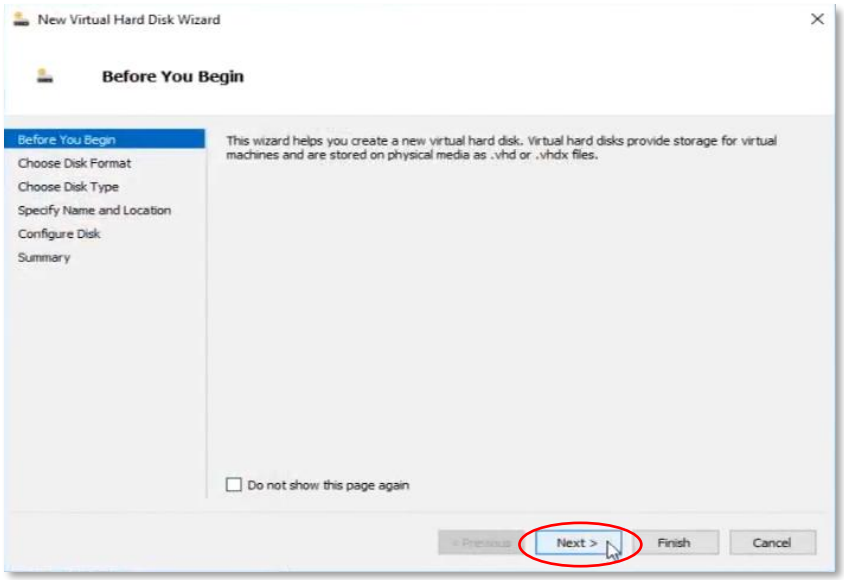
A new virtual drive will be added under your primary drive on the left panel.



1.12 Adding a New Hard Drive

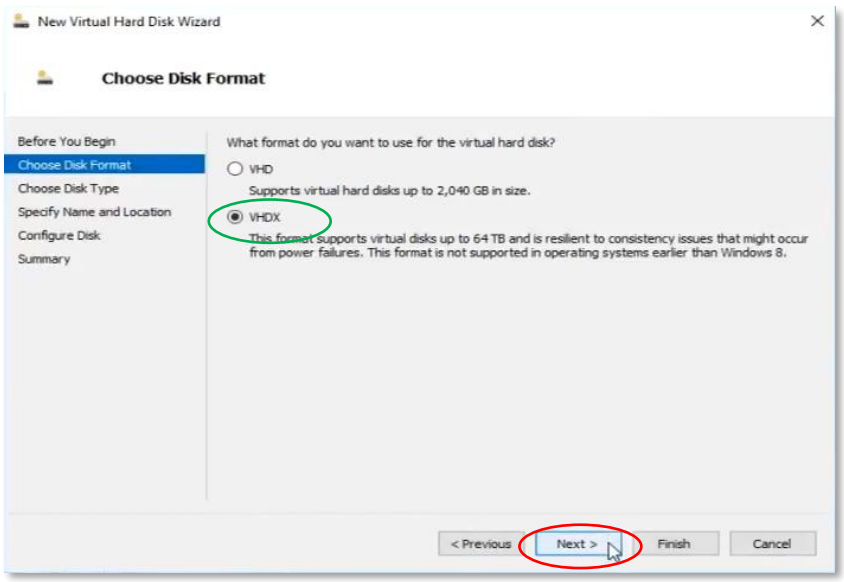
Click the **New** button on the new *Hard Drive* screen.

The *New Virtual Hard Disk Wizard* window will open.



1.13 Getting Started with the HD Wizard

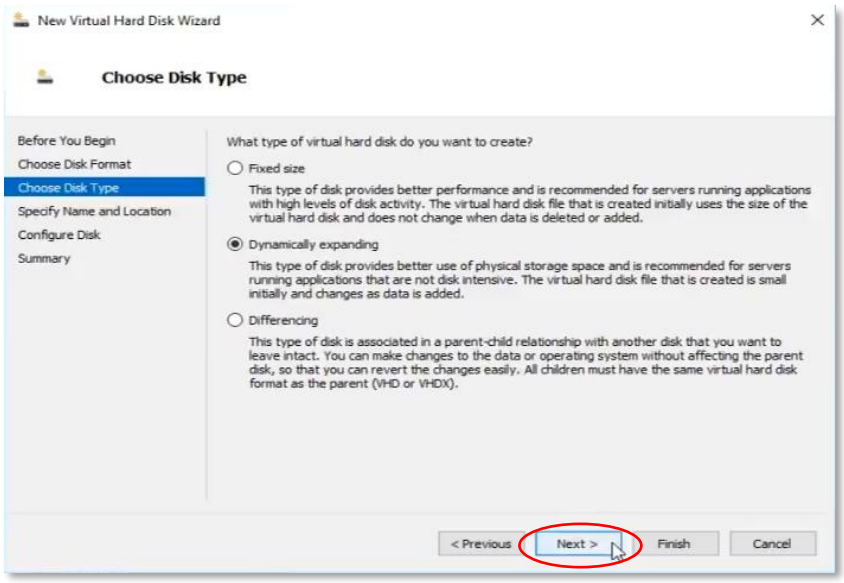
You can skip the first screen, *Before You Begin* on the *New Virtual Hard Disk Wizard* screen by clicking the **Next** button.



1.14 Choosing the Disk Format

On the *Choose Disk Format* screen, make sure **VHDX** is selected.

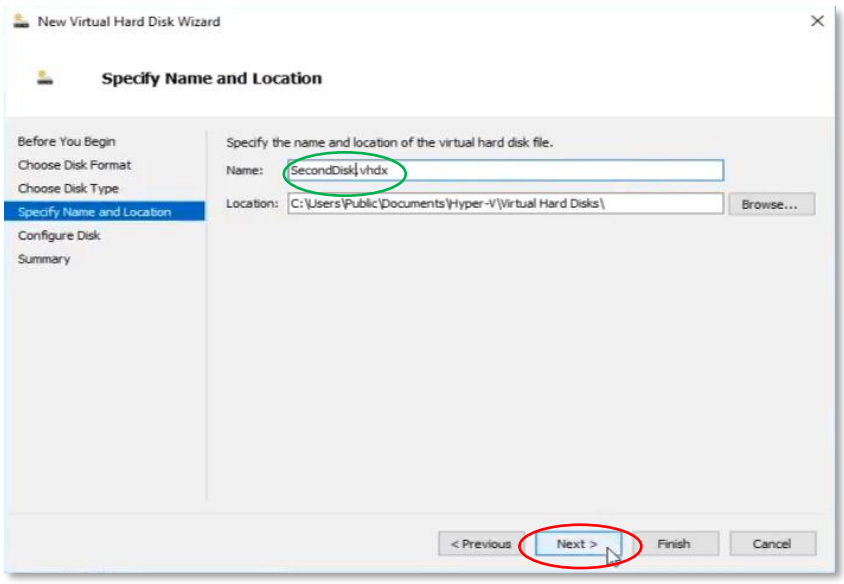
Click the **Next** button to continue.



1.15 Choosing the Disk Type

You can keep the default settings as-is on the *Choose Disk Type* screen.

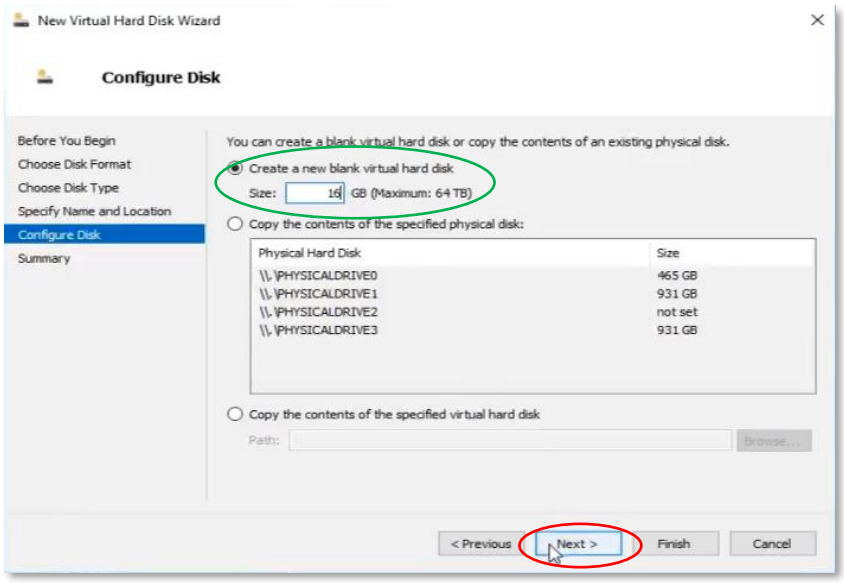
Click the **Next** button to continue.



1.16 Specifying the Hard Disk Name and Location

On the *Specify Name and Location* screen, give your virtual hard disk a name For example, **SecondDisk.vhdx**. For location, you can keep the default path or change it wherever you want to store the virtual hard disk.

Click the **Next** button to continue.

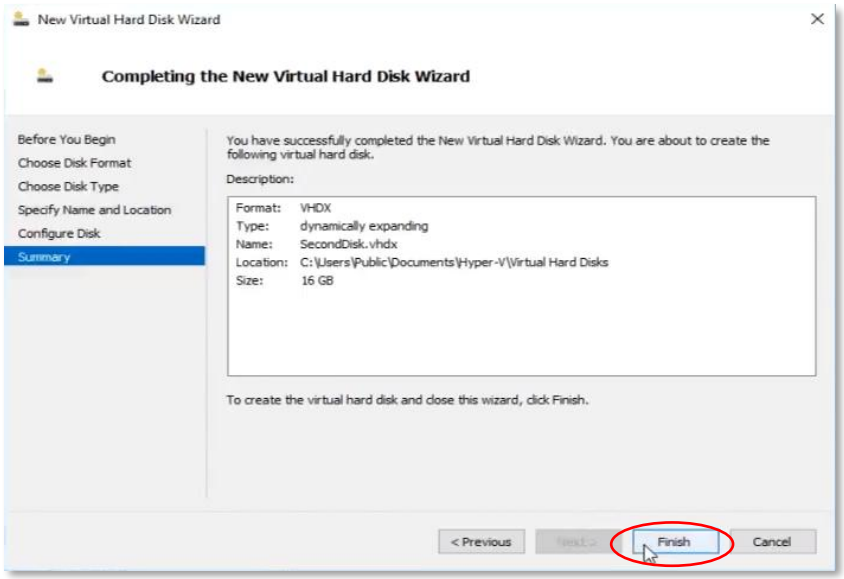


1.17 Configuring the Hard Disk

On the *Configure Disk* screen, select the **Create a new blank virtual hard disk** option. For the **Size** parameter, you can start with a small allocation (i.e. 16 GB) and then increase as needed.

> *Please check the Storage for Screen Recordings section under the Storage Requirements section for more information on storage requirements.*

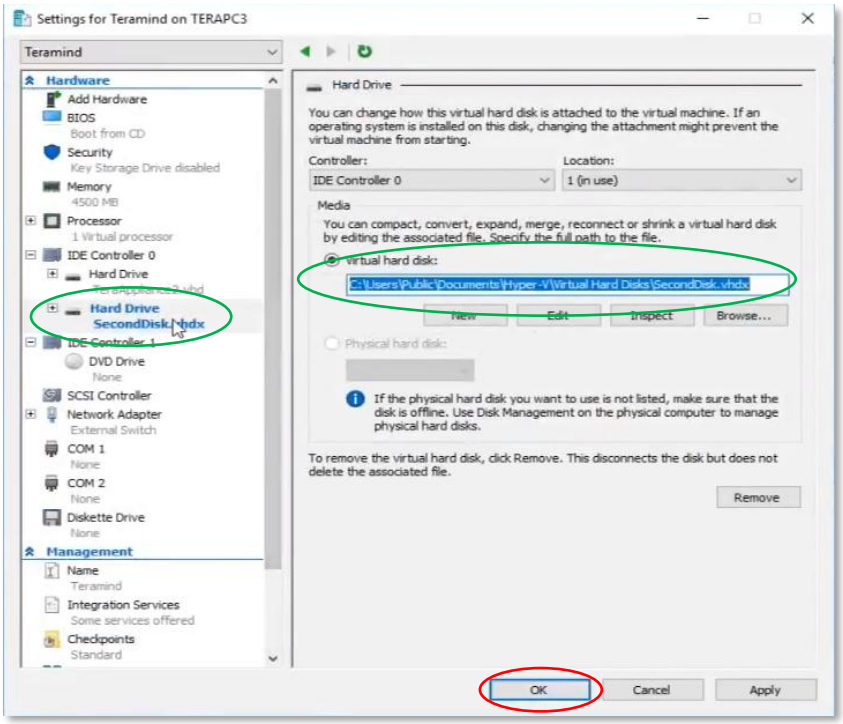
Click the **Next** button to continue.



1.18 Finishing the Hard Disk Setup

The *Summary* screen will show a summary of your disk.

Click the **Finish** button to finish setting up the disk. The wizard window will close automatically and return you to the VM settings window.

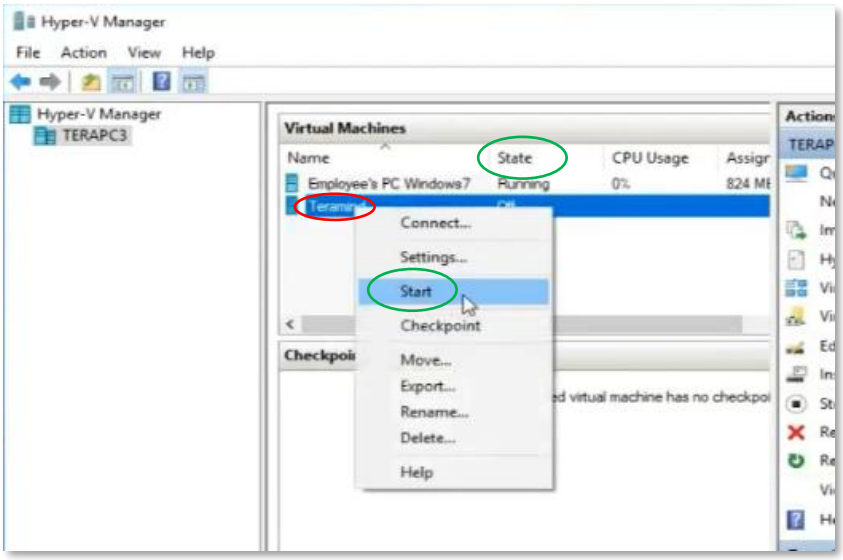


1.19 Viewing the Virtual Hard Disk on the Hardware List

You can see the newly created virtual hard disk **SecondDisk** under the *IDE Controller 0*. The path to the hard disk will also be shown on the right panel on the **Virtual hard disk field**.

Click the **OK** button to save the changes and close the Settings window.

We are now ready to start the server.

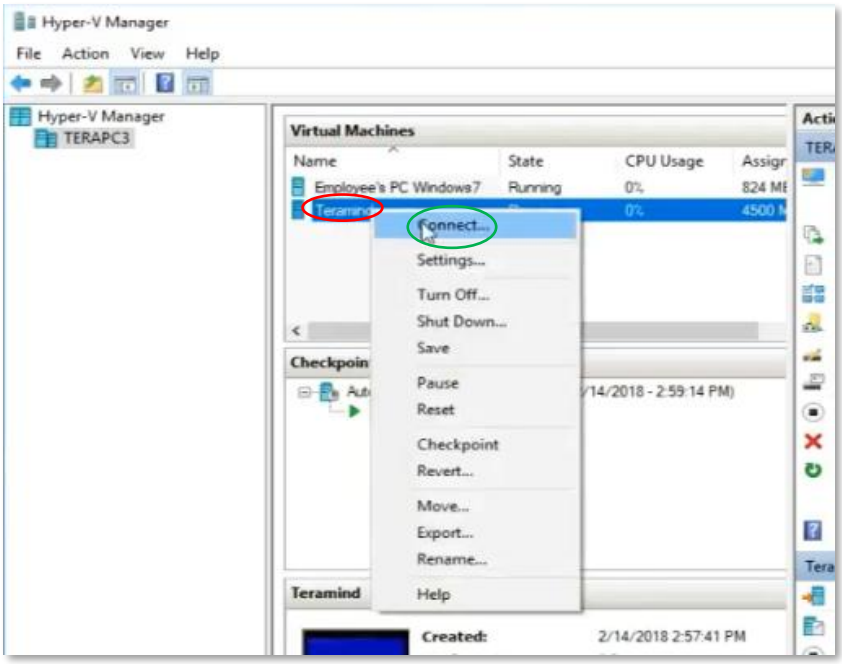


1.20 Starting the VM

On the main Hyper-V Manager interface, under the *Virtual Machines* panel locate the VM **Teramind**.

Right-click on it, and select **Start** from the pop-up menu to start the server.

When the VM is ready, the **State** of the server will change from *Off* to *Running.*



1.21 Preparing for Step 2

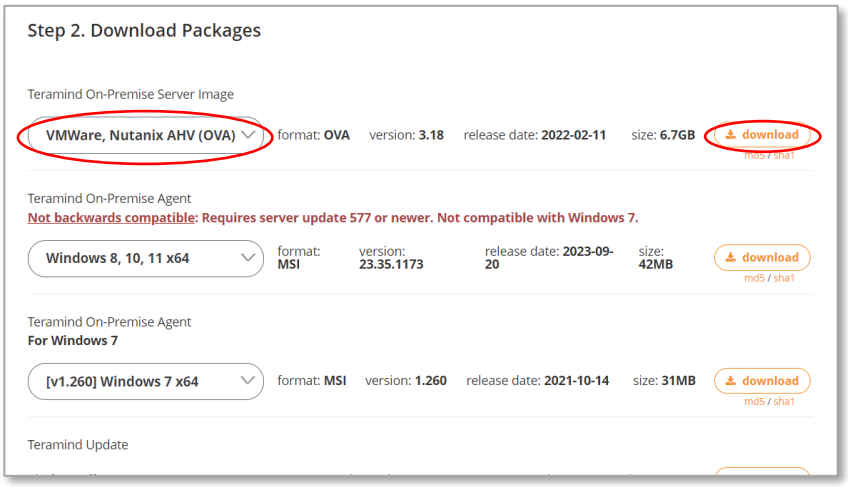
When the VM is ready, right-click the **Teramind** VM again and select **Connect…** from the pop-up menu to open the Console window.

Once the console window opens, you will be able to set up the IP, network and assign machine role(s).

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue.

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue with the deployment process.

1 Option 4: Setting Up a Virtual Server with Nutanix AHV (OVA Method)

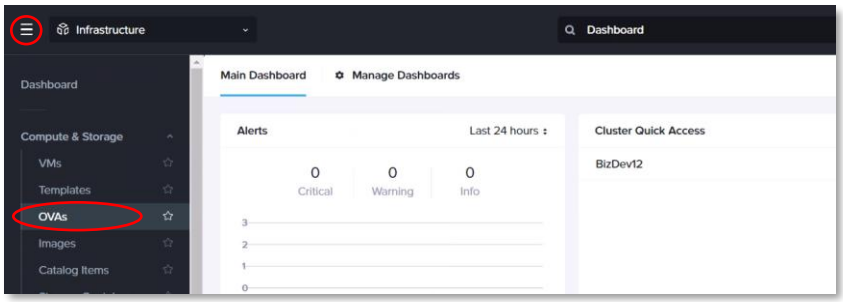


1.1 Downloading the VM Image

Go to the **Download** section of the Teramind [Self-Hosted Portal](#).

Scroll down to the *Step 2: Download Packages* section.

Select **VMWare, Nutanix AHV (OVA)** from the *Teramind On-Premises Server Image* drop-down list and click the **download** button to download the OVA file.



1.2 Accessing the OVAs Screen on the Prism Central Dashboard

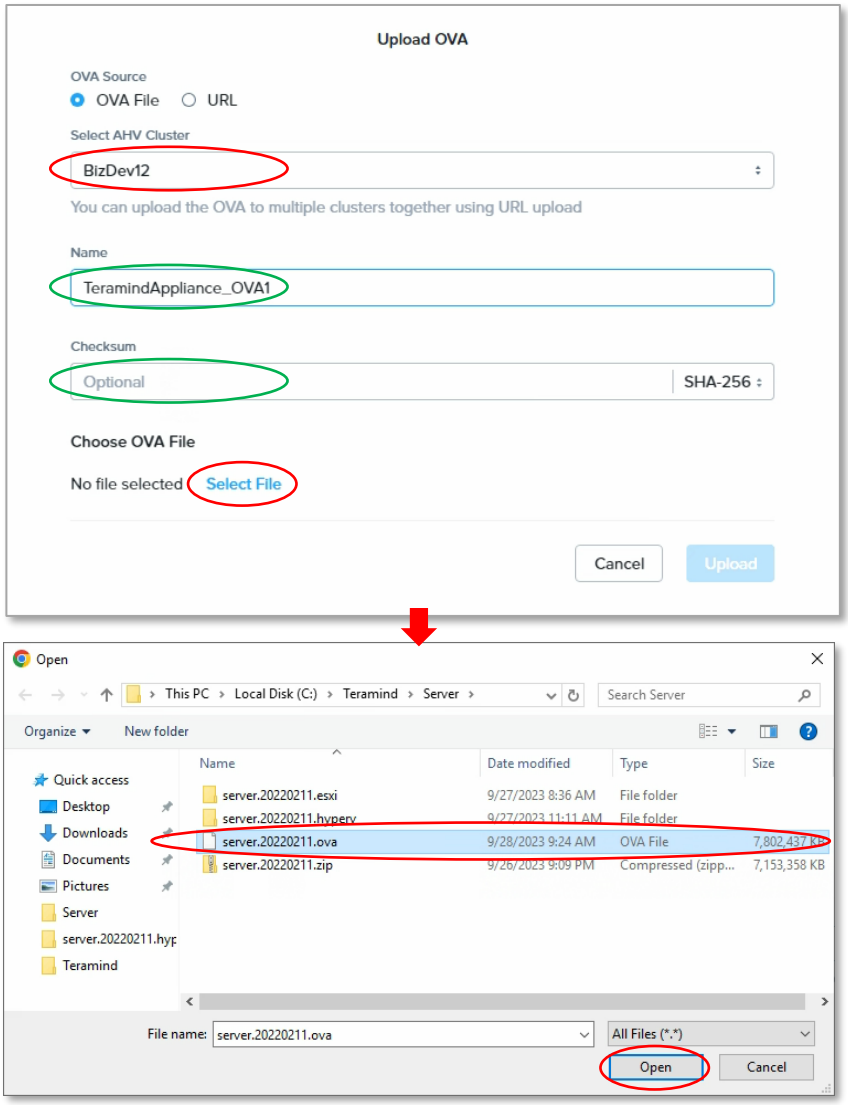
Open your *Prism Central* dashboard, and click the **Main Menu** icon from the top left.

Select **OVAs**.



1.3 Uploading the OVA

Click the **Upload OVA** button located near the top-left corner.



1.4 Choosing the OVA File

On the *Upload OVA* screen, select a cluster from the **Select AHV Cluster** drop-down list.

You can optionally enter a **Name** for the OVA.

You can optionally enter a **Checksum** for the OVA.

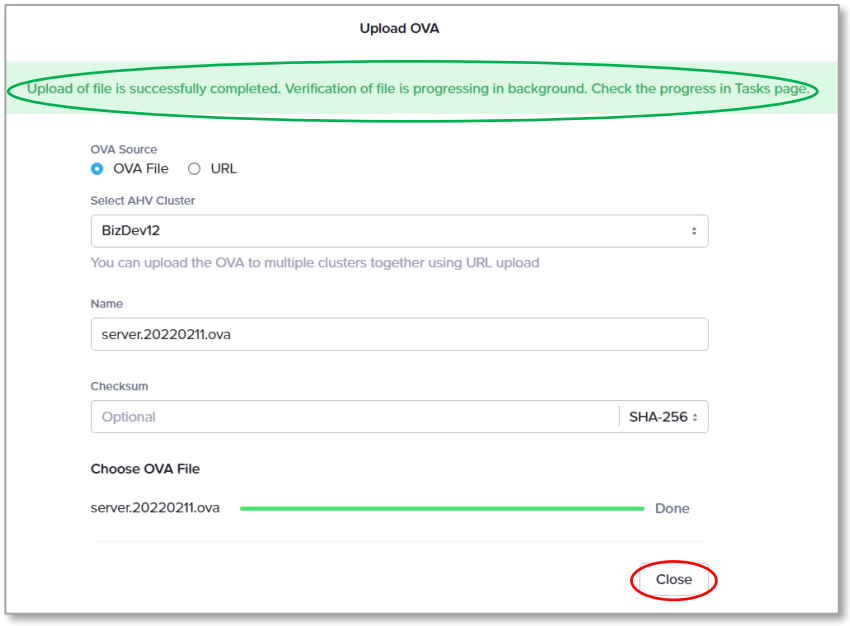
Note: you can find the checksum for the OVA on the *Self-Hosted Portal* under the **download** button, see Step *1.1 Downloading the VM Image*).

Click the **Select File** link. A file *Open* dialogue box will pop up.

Select the **.ova** file that you downloaded in Step *1.1 Downloading the VM Image*.

Click the **Open** button on the *Open* dialogue box.

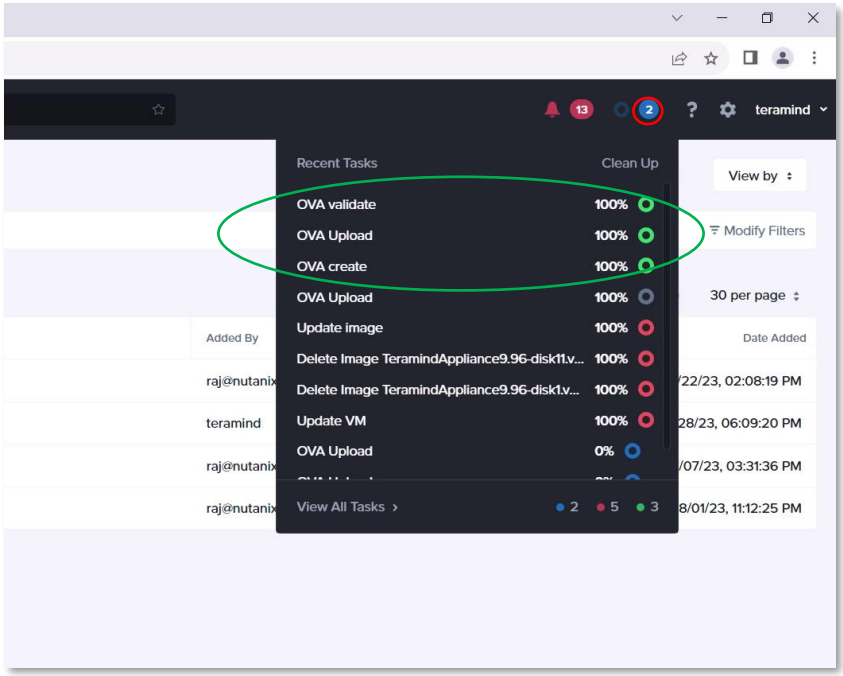
The file will start to upload.



1.5 Completing the Upload

Once the upload is completed, you will see a message that says, "Upload of file is successfully completed…".

Click the **Close** button. It will take you back to the *OVAs* screen.



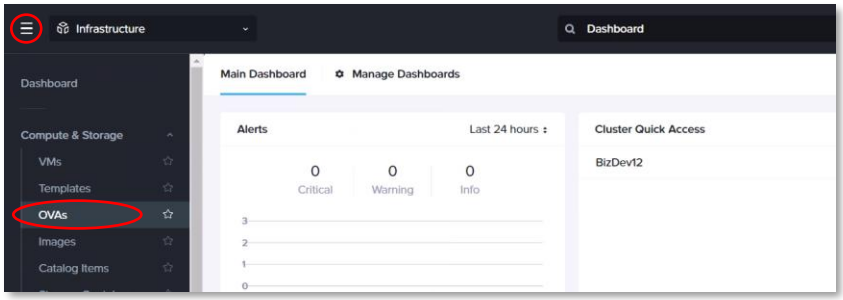
1.6 Validating the OVA

When you upload an OVA, the system will perform three tasks: **OVA create**, **OVA upload** and finally, **OVA validate**.

It might take a while to complete all three tasks.

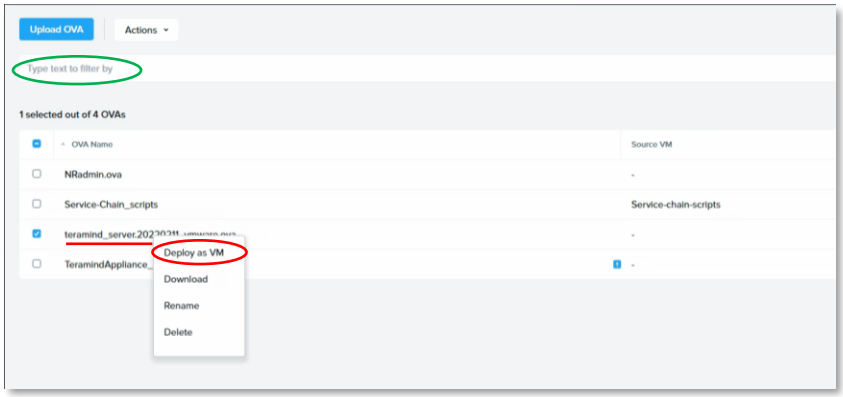
You will be able to see the status of these tasks by clicking the **Recent Tasks** icon (the icon is located near the top right corner, showing a number inside a blue circle)

When the OVA tasks are finished, you will be able to use the OVA to deploy your VM.



1.7 Accessing the OVAs Screen

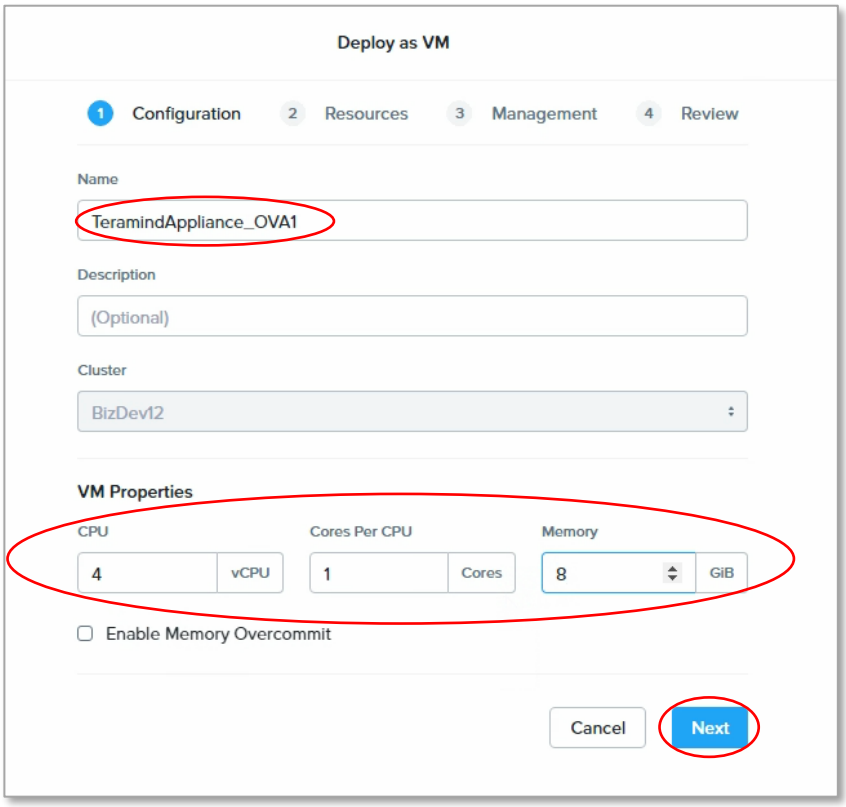
If you aren't there already, go to the *OVAs* screen by selecting **OVAs** from the **Main Menu**.



1.8 Deploying the OVA as a VM

Locate the OVA you created (you can use the **filter** to narrow down the list).

Right-click on the OVA and select **Deploy as VM** from the pop-up menu. You will be taken to the *Deploy as VM* wizard screen.

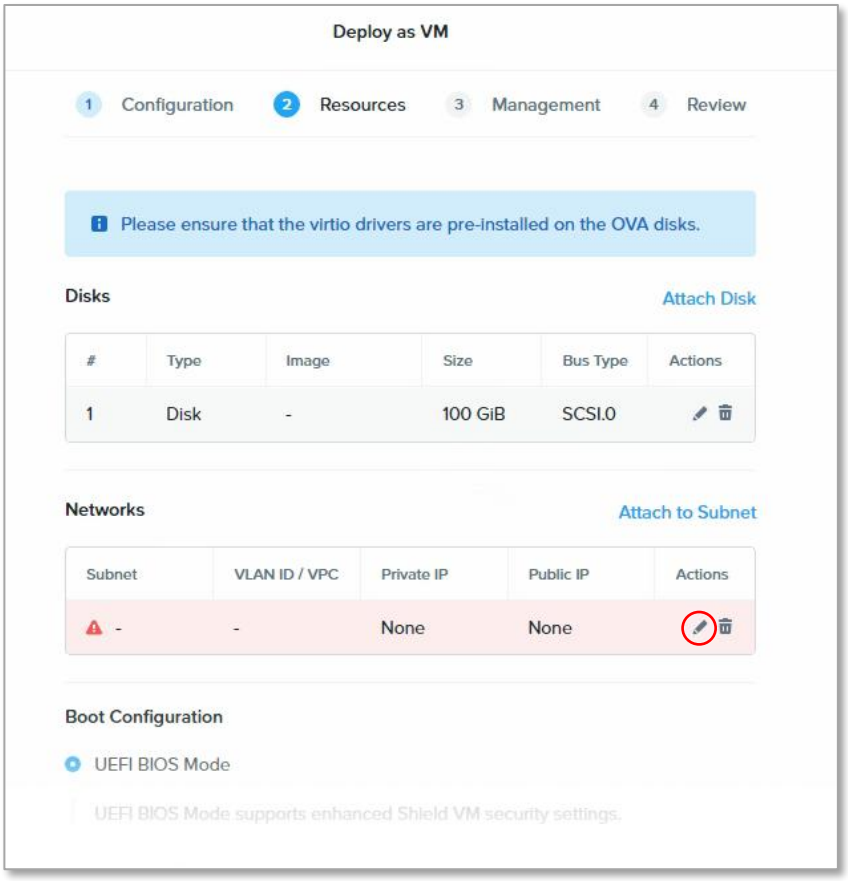


1.9 Configuring the VM

On the first step, *Configuration*, enter a **Name** for your VM.

Adjust the **CPU**, **Cores Per CPU**, and **Memory** under the *VM Properties* section according to your needs. You can use the Primary Server Requirements section to get an idea of how much CPU/memory you might need.

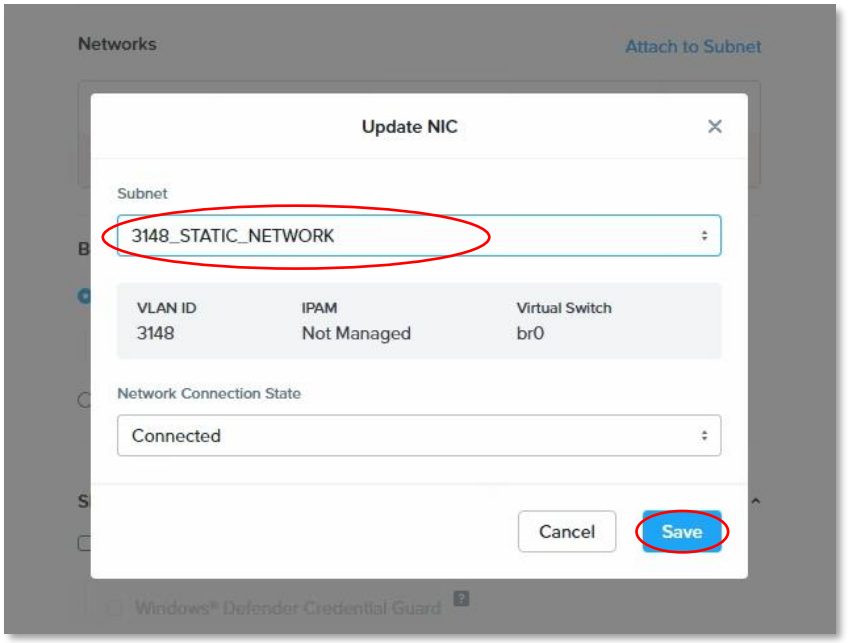
Click the **Next** button to continue to the next step.



1.10 Allocating Resources - Disks & Networks

On the second step, *Resources*, you will notice that the OVA already comes with a disk, so you don't have to add one.

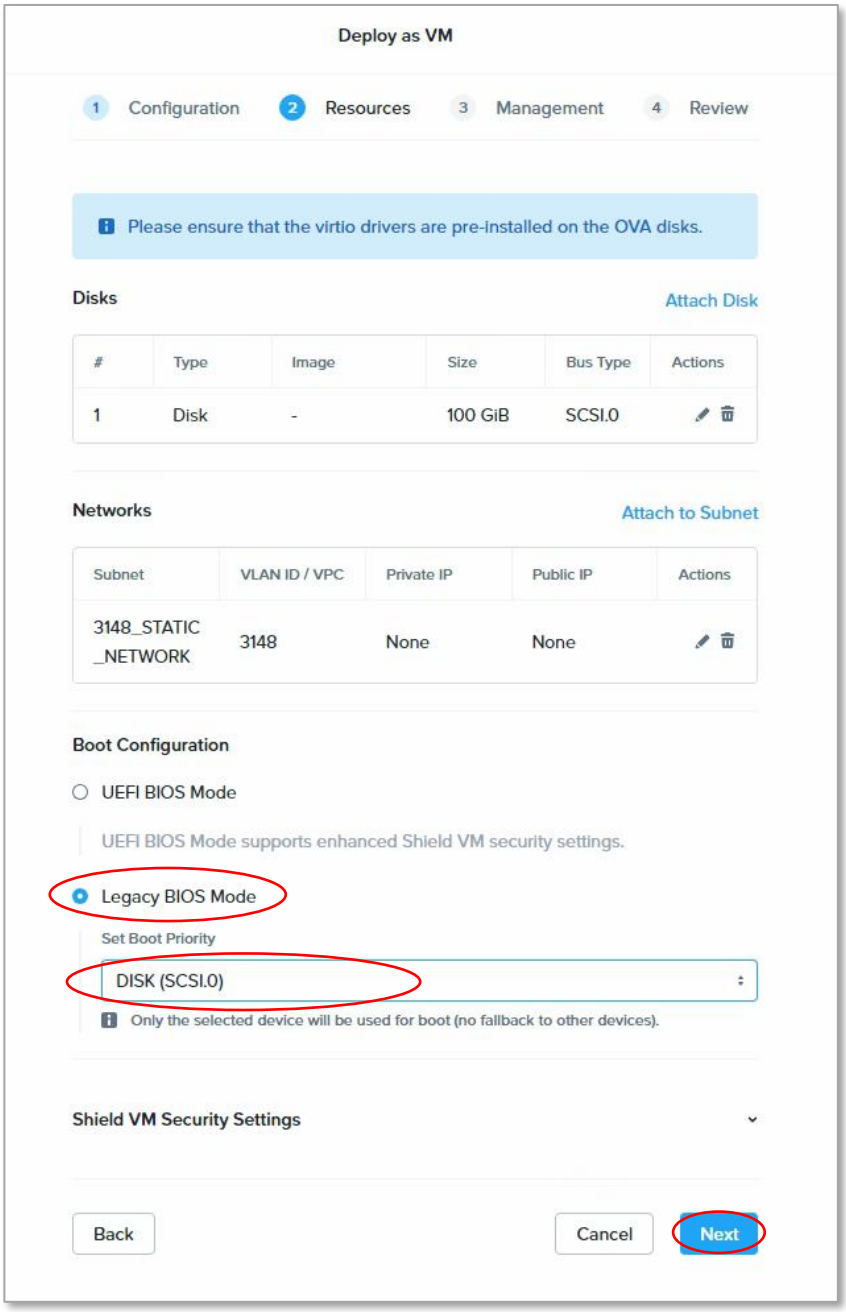
Under the *Networks* section, click the **Pencil** icon next to the empty subnet (if you don't see any subnet, click the **Attach to Subnet** button). The *Update NIC* window will pop up.



1.11 Updating the NIC / Subnet

On the *Update NIC* pop-up window, select an appropriate network from the **Subnet** drop-down list.

Click the **Save** button.



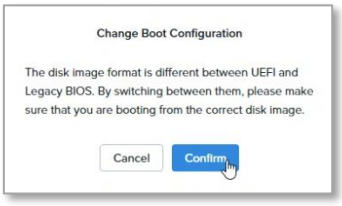
1.12 Changing the Boot Configuration / BIOS Mode

Back on the *Resources* step, select the **Legacy BIOS Mode** option under the *Boot Configuration* section.

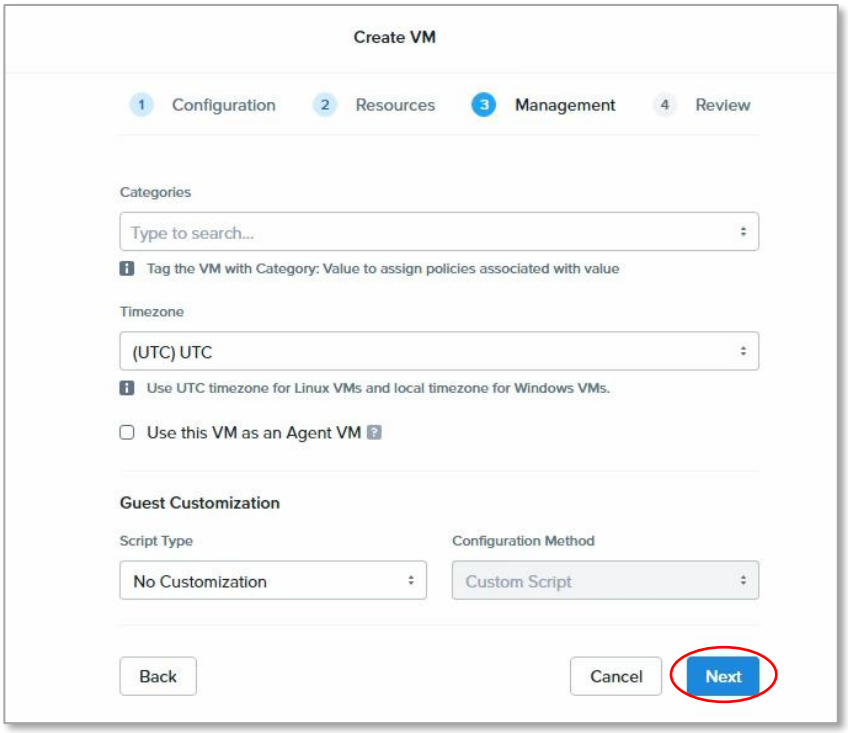
Select **DISK (SCSI)** from the *Set Boot Priority* drop-down list.

Click the **Next** button to go to the next step.

Note: you might see a warning when you change the BIOS mode:



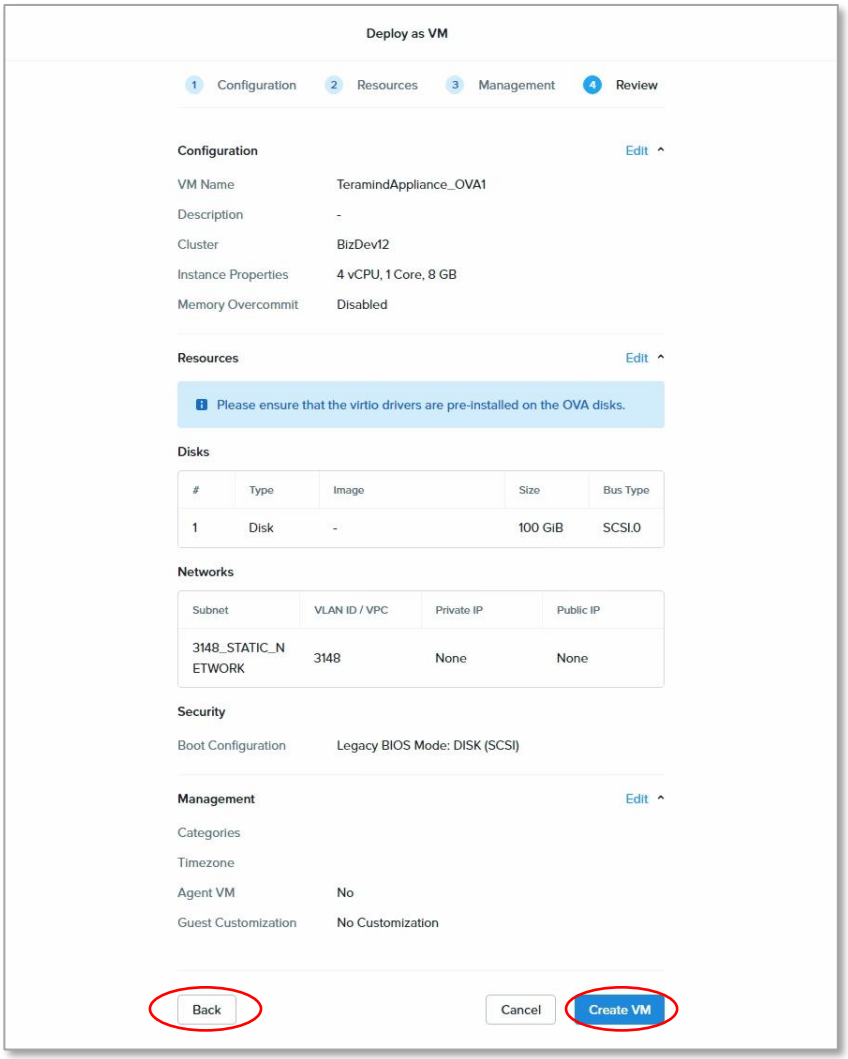
*If you see such a warning, press the **Confirm** button on the warning dialogue box to confirm the change.*



1.13 Configuring the Management Options

On the *Management* step, you can optionally configure the *Categories*, *Timezone*, and *Guest Customization*. However, in this tutorial, we will keep their default values.

Click the **Next** button to go to the next step.



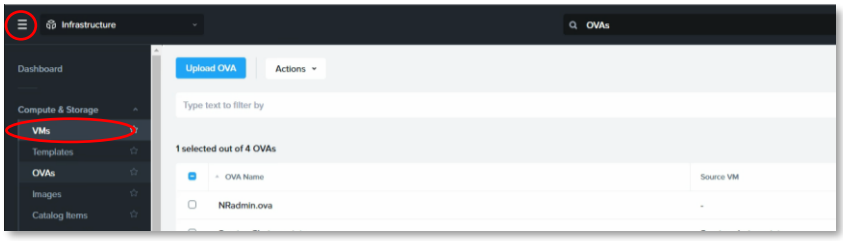
1.14 Reviewing and Finalizing the VM Creation

On the *Review* step, verify all the settings are correct.

If needed, you can press the **Back** button to go back and make any adjustments.

Otherwise, click the **Create VM** button. You will be taken back to the *Upload OVA* screen.

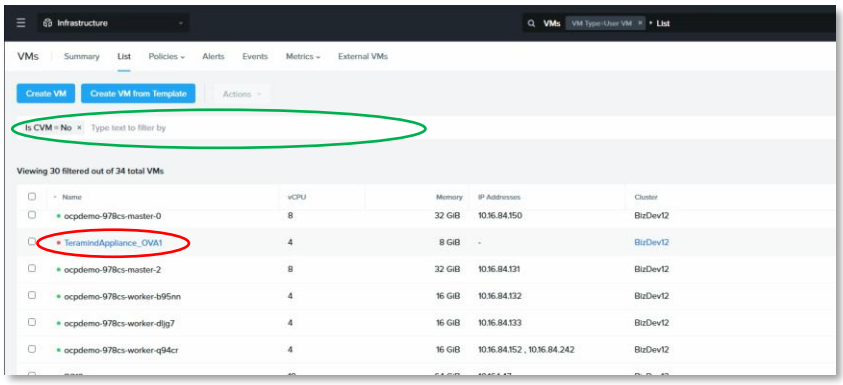
Your VM will be ready within a few seconds.



1.15 Accessing the VMs Screen

Click the **Main Menu** icon from the top left corner.

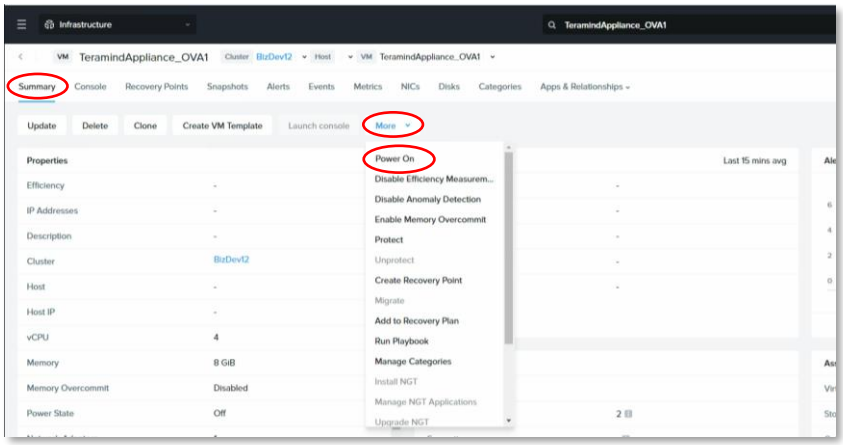
Select **VMs**.



1.16 Launching the VM

On the *VMs* screen, locate the VM you just created. You can use the **filter** on top of the screen to quickly locate the VM.

Click the **name** of the VM. It will take you to the VM's screen.

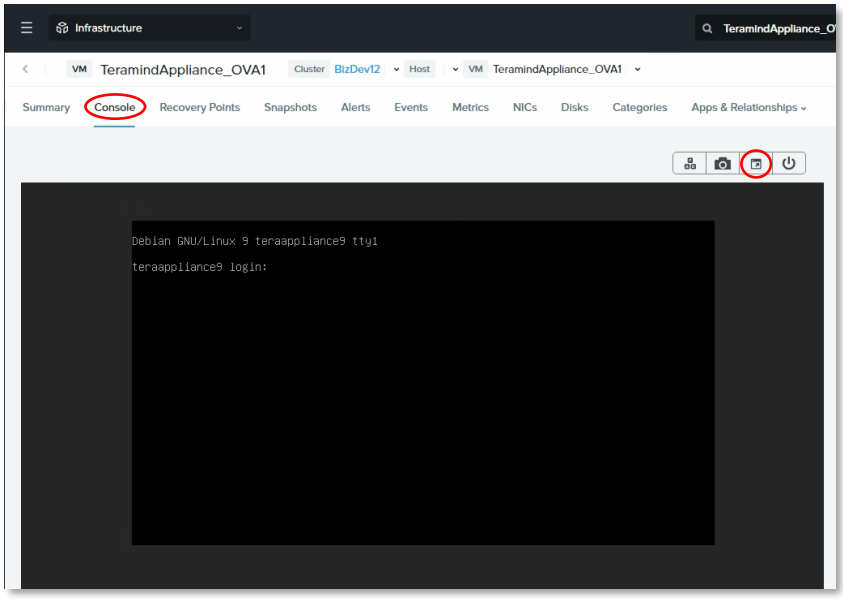


1.17 Powering Up the VM

On the VM's screen, select the **Summary** tab.

Click the **More** button and then select the **Power On** option from the drop-down menu.

The VM will be powered on and become ready for use in a moment.



1.18 Preparing for Step 2

On the VM's configuration screen, select the **Console** tab.

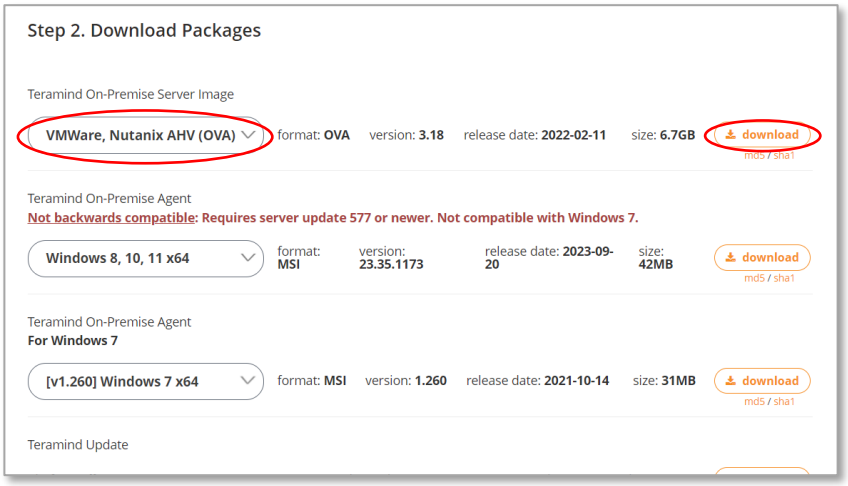
The VM will boot up in a few seconds and you will be shown the login prompt.

You will now be able to set up the IP, network and assign machine role(s).

*Note: you can click the **Pop-Up Window** icon to open the Console in a separate window to make it easier to work with.*

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue with the deployment process.

1 Option 5: Setting Up a Virtual Server with Nutanix AHV (Unpacked OVA Method)

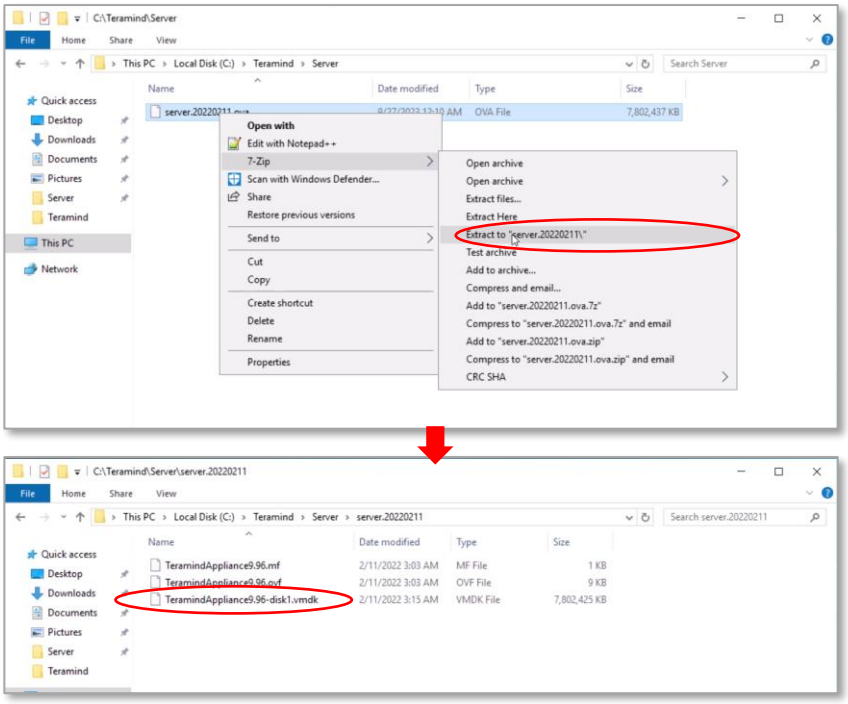


1.1 Downloading the VM Image

Go to the **Download** section of the Teramind Self-Hosted Portal.

Scroll down to the *Step 2: Download Packages* section.

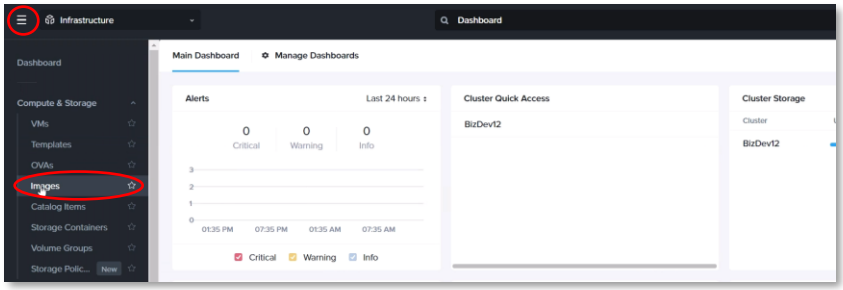
Select **VMWare, Nutanix AHV (OVA)** from the *Teramind On-Premises Server Image* drop-down list and click the **download** button to download the OVA file.



1.2 Extracting the OVA File

The OVA file is a compressed archive. You will need to **extract** the file using a utility such as 7-Zip.

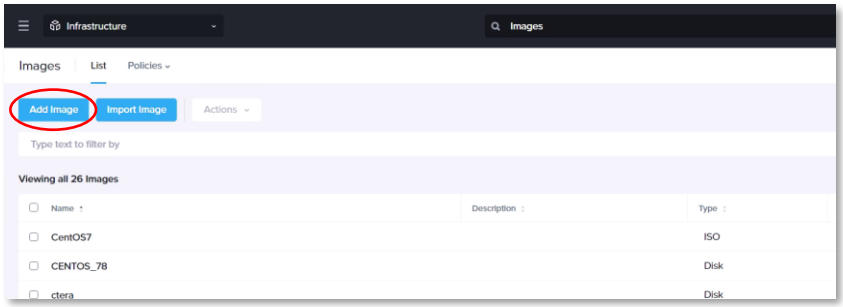
The extracted OVA file should contain several files. You will need to use the file with a **`.vmdk`** extension in *Step 1.5 Adding the VMDK Image File*.



1.3 Accessing the Images Screen on the Prism Central Dashboard

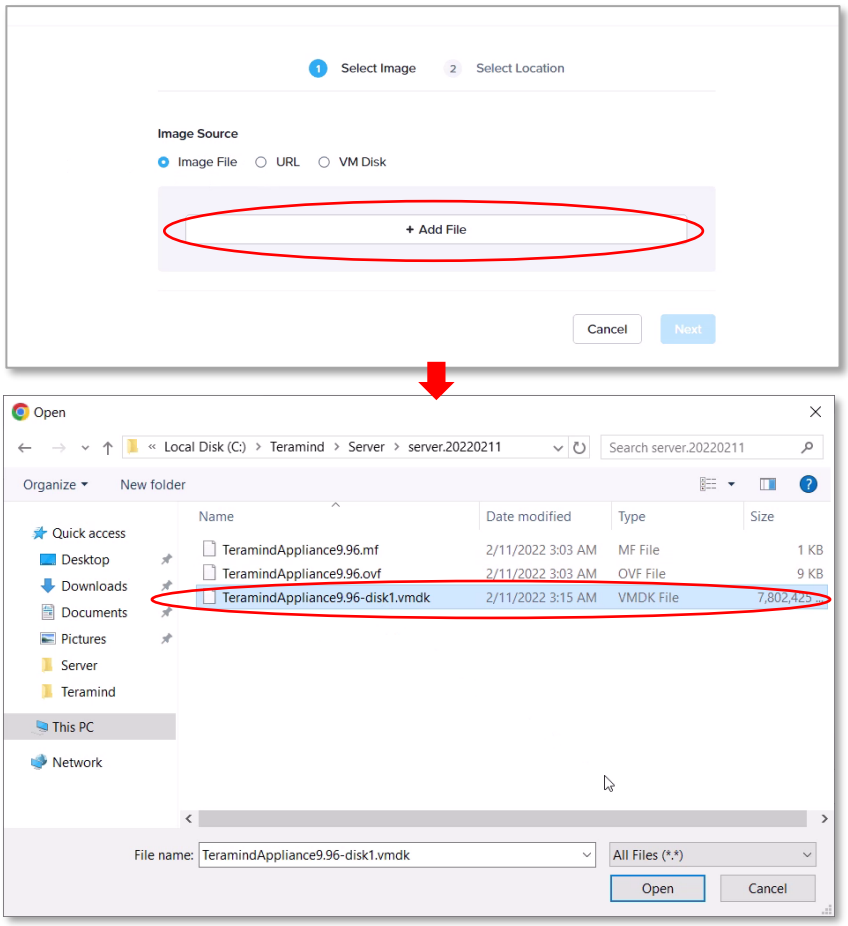
Open your *Prism* dashboard, and click the **Main Menu** icon from the top-left corner.

Select **Images**.



1.4 Adding a New Image

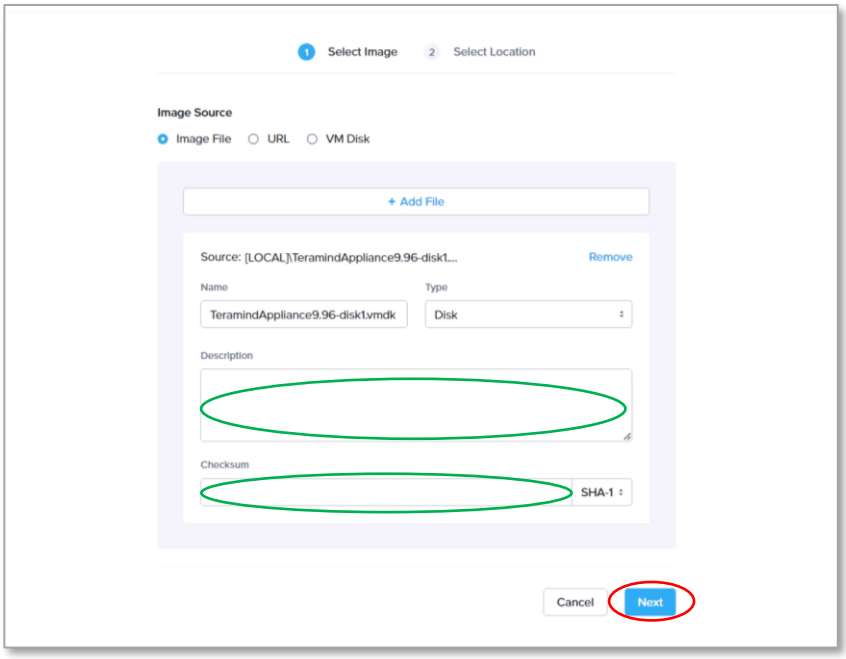
Click the **Add Image** button located near the top-left corner.



1.5 Adding the VMDK Image File

Click the **Add File** button. A file *Open* dialogue box will pop up.

Select the **.vmdk** file that you extracted from the OVA image in *Step 1.2 Extracting the OVA File*.

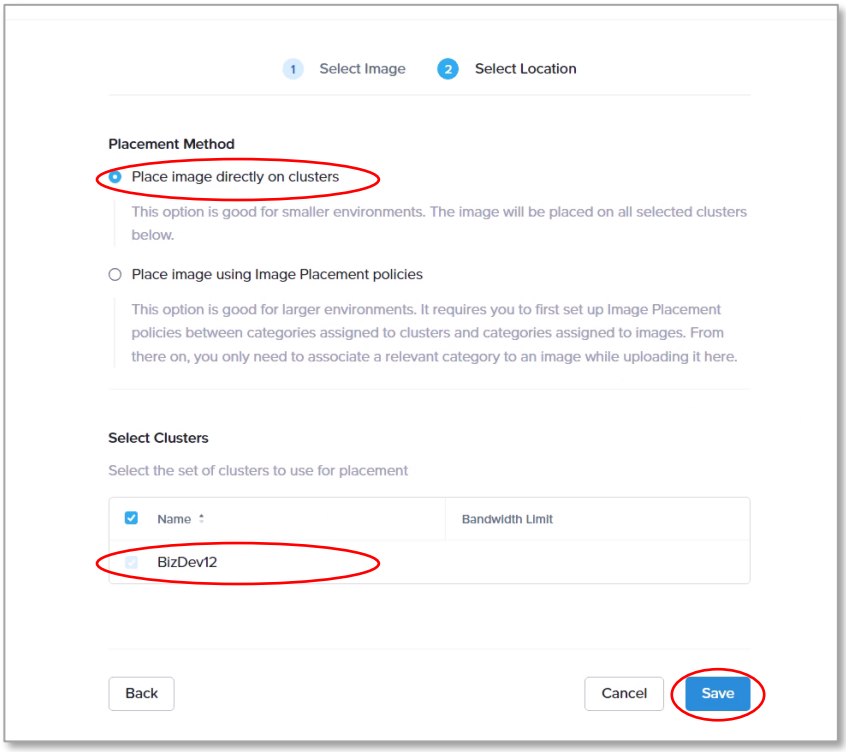


1.6 Adding the Image Description and Checksum (optional)

You can optionally add a **Description** and **Checksum**. However, in this tutorial, we do not need to use them.

Note: you can find the checksum for the OVA on the *Self-Hosted Portal* under the **download** button, see *Step 1.1 Downloading the VM Image*).

Click the **Next** button to continue to the next step.

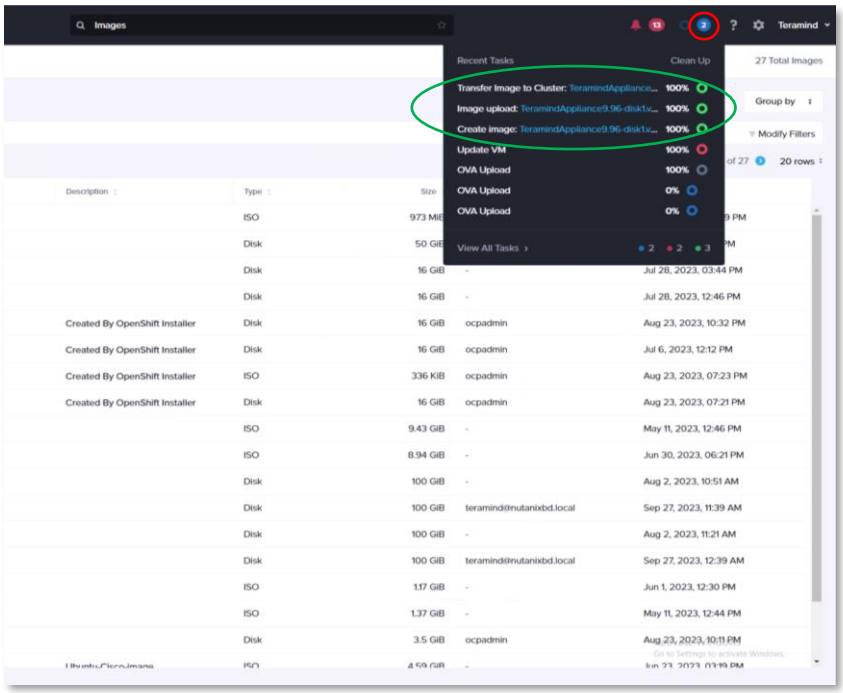


1.7 Selecting the Placement Method and Clusters

Select the **Place image directly on clusters** option under the *Placement Method* section.

If you have multiple clusters, you can select them under the *Select Clusters* section. In this tutorial, we have only one cluster, **BizDev12** and it's selected by default.

Click the **Save** button. The image will be saved and you will be taken back to the *Images* screen.



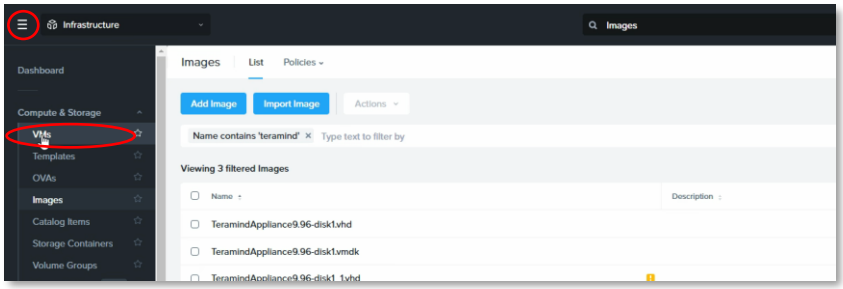
1.8 Verifying the Image Creation & Transfer

When you create the image, the system will perform three tasks: **Create image**, **Image upload** and finally, **Transfer Image to Cluster**.

Depending on your network speed, it might take a while complete all three tasks.

You will be able to see the status of these tasks by clicking the **Recent Tasks** icon (the icon is located near the top-right corner, showing a number inside a blue circle)

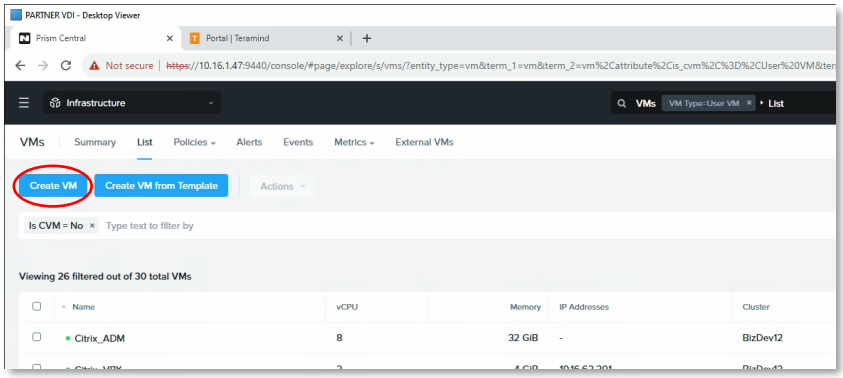
When the image tasks are finished, you will be able to use the image with your VM.



1.9 Accessing the VMs Screen

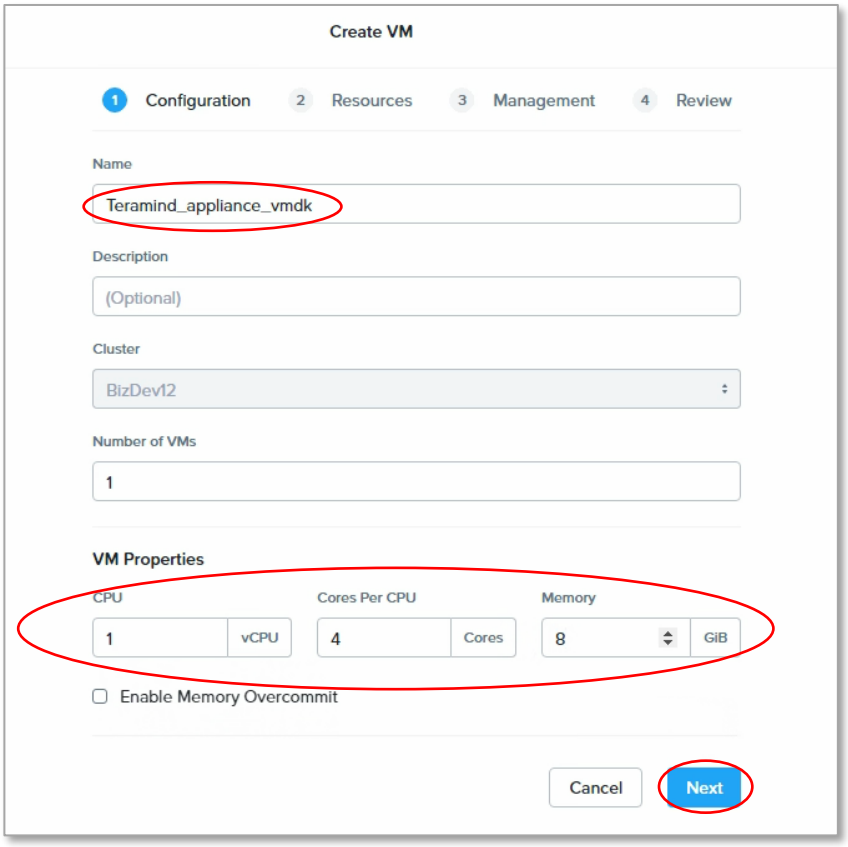
Click the **Main Menu** icon from the top-left corner.

Select **VMs**.



1.10 Adding a New VM

Click the **Create VM** button located near the top-left corner.

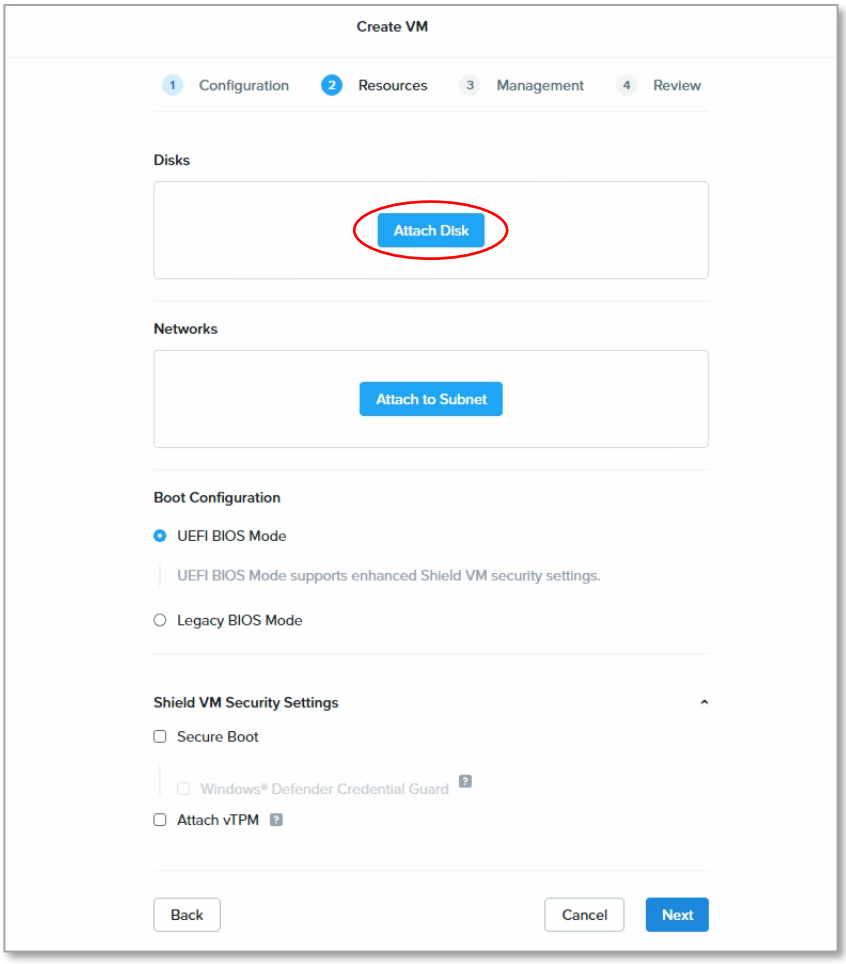


1.11 Configuring the VM

On the first step, *Configuration*, enter a **Name** for your VM.

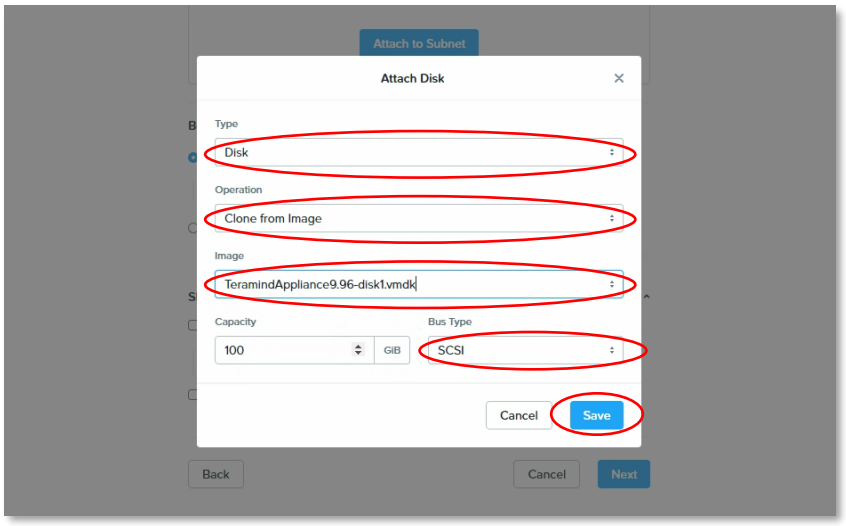
Adjust the **CPU**, **Cores Per CPU**, and **Memory** under the *VM Properties* section according to your needs. You can use the Primary Server Requirements section to get an idea of how much CPU/memory you might need.

Click the **Next** button to continue to the next step.



1.12 Allocating Resources – Disks

On the second step, *Resources*, click the **Attach Disk** button. A pop-up window will open.



1.13 Attaching a Disk Image

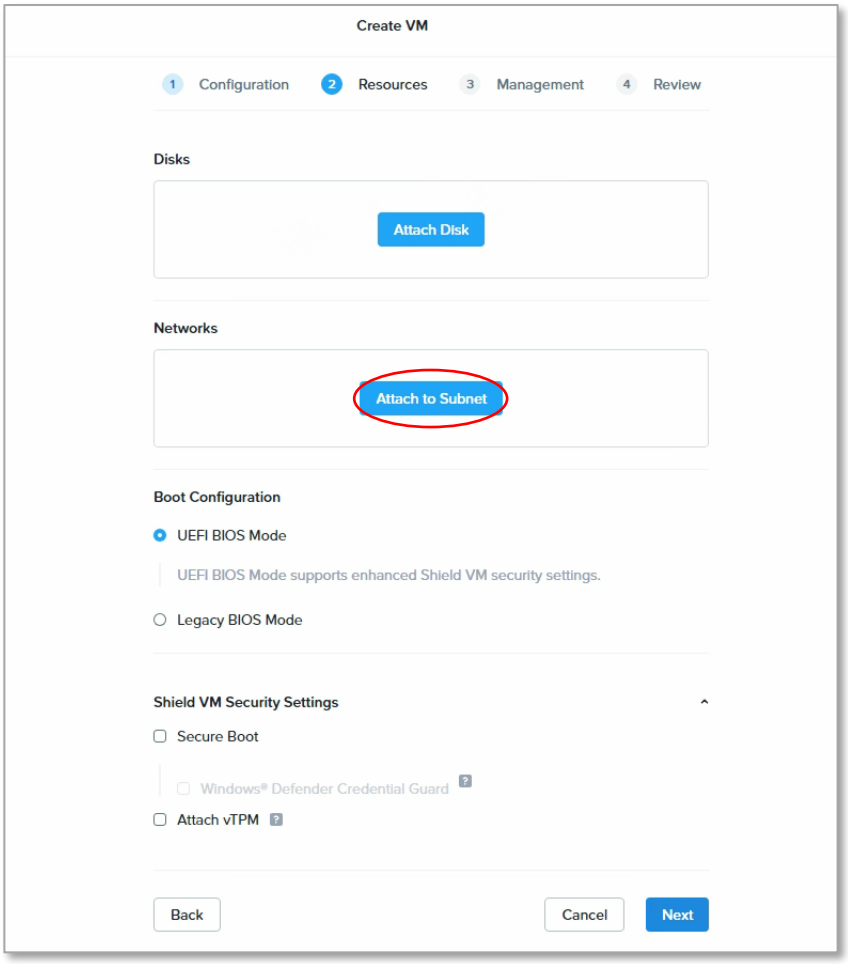
Select **Disk** from the *Type* drop-down list.

Select **Clone from Image** from the *Operation* drop-down list.

Select the **.vmdk** image you previously created from the *Image* drop-down list.

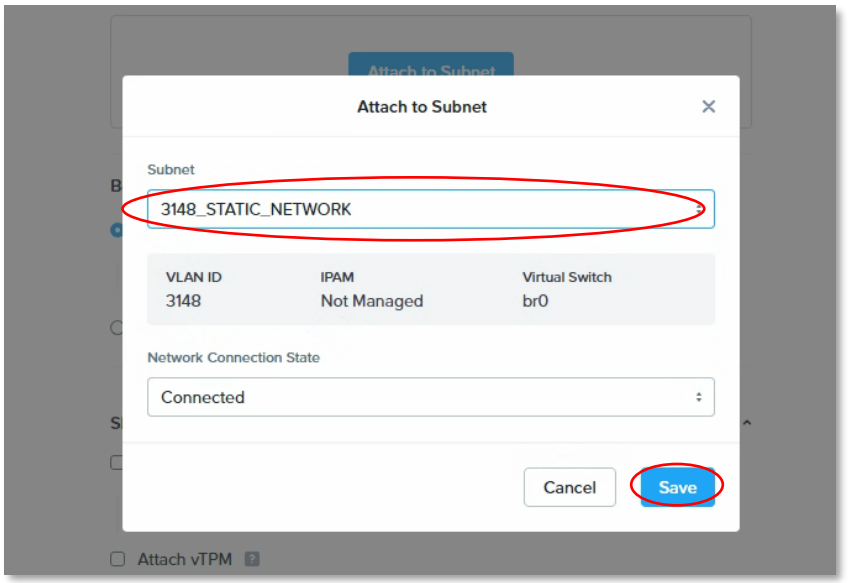
Make sure **SCSI** is selected from the *Bus Type* drop-down list.

Click the **Save** button.



1.14 Allocating Resources – Networks

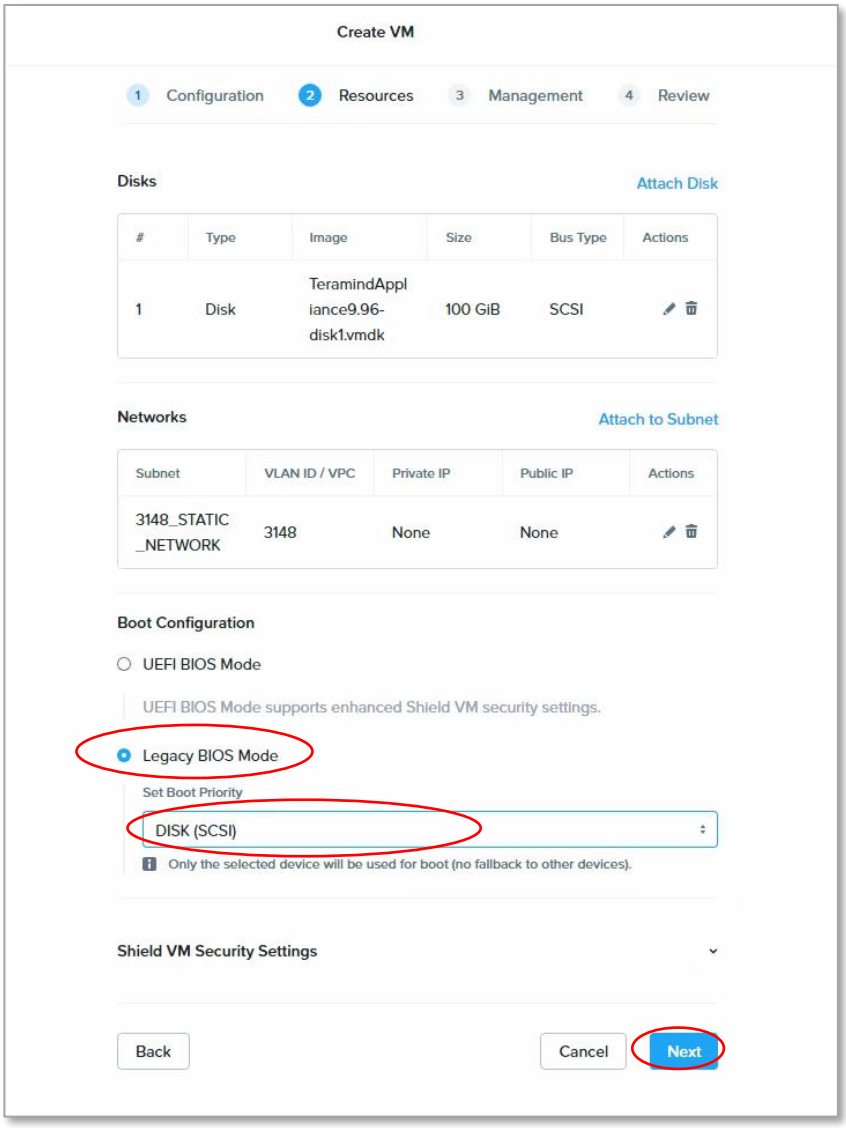
Back on the *Resources* step, click the **Attach to Subnet** button. A pop-up window will open.



1.15 Attaching to a Subnet

Select an appropriate network from the *Subnet* drop-down list.

Click the **Save** button.



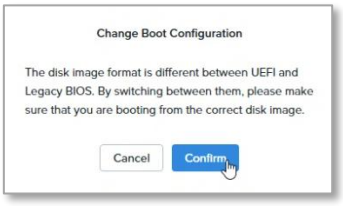
1.16 Changing the Boot Configuration / BIOS Mode

Back on the *Resources* step, select the **Legacy BIOS Mode** option under the *Boot Configuration* section.

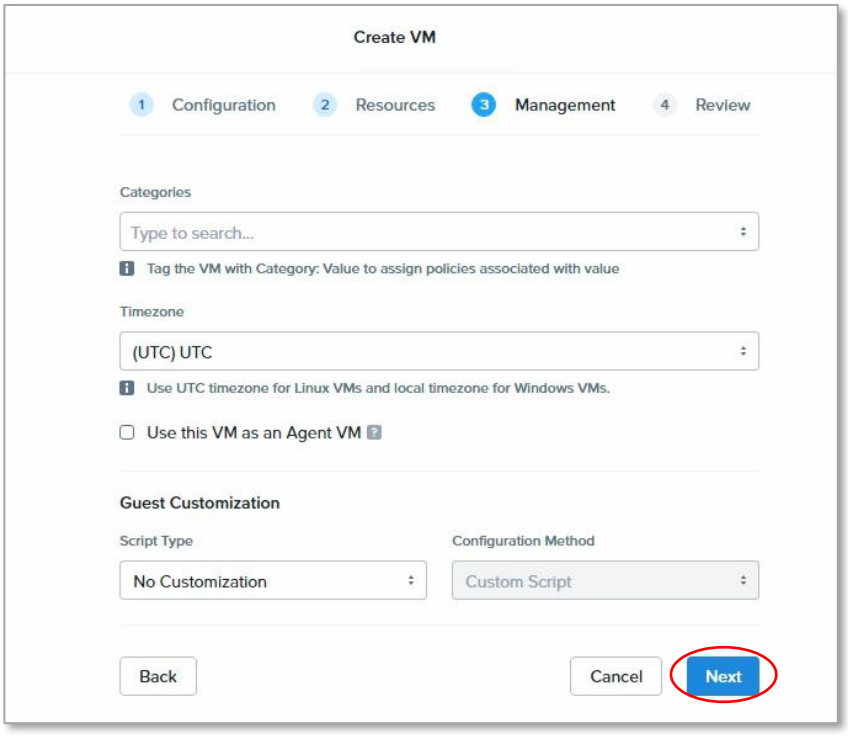
Select **DISK (SCSI)** from the *Set Boot Priority* drop-down list.

Click the **Next** button to go to the next step.

Note: you might see a warning when you change the BIOS mode:



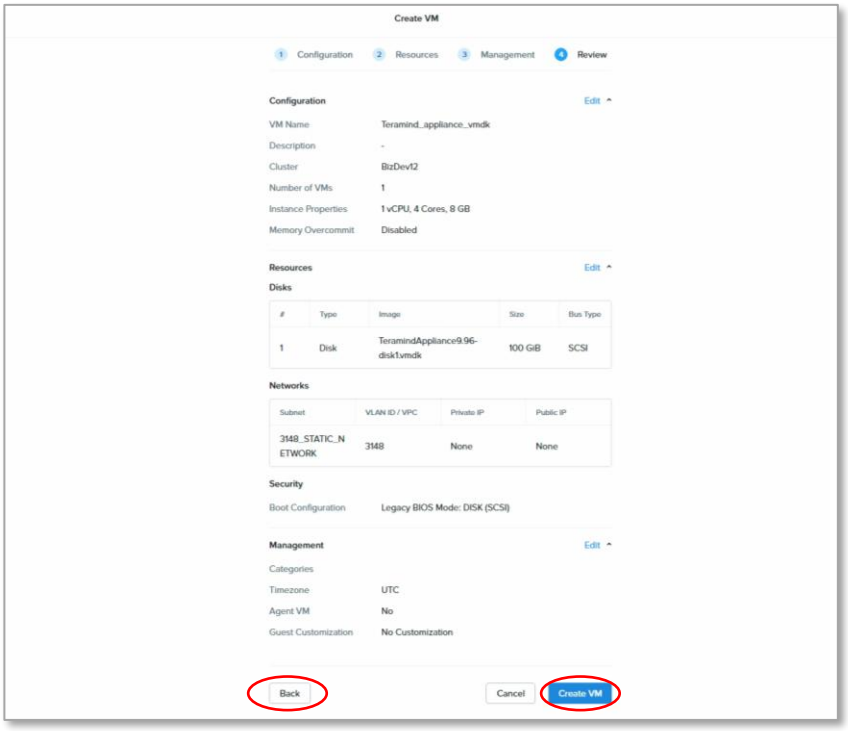
*If you see such a warning, press the **Confirm** button on the warning dialogue box to confirm the change.*



1.17 Configuring the Management Options

On the *Management* step, you can optionally configure the *Categories*, *Timezone*, and *Guest Customization*. However, in this tutorial, we will keep their default values.

Click the **Next** button to go to the next step.

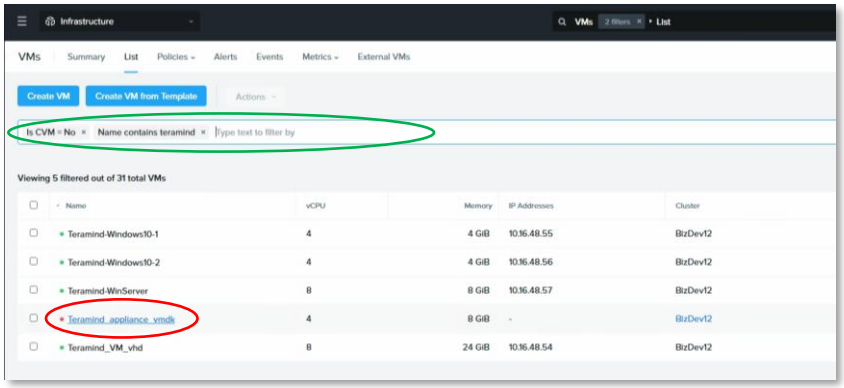


1.18 Reviewing and Finalizing the VM Creation

On the *Review* step, verify all the settings are correct.

If needed, you can press the **Back** button to go back and make any adjustments.

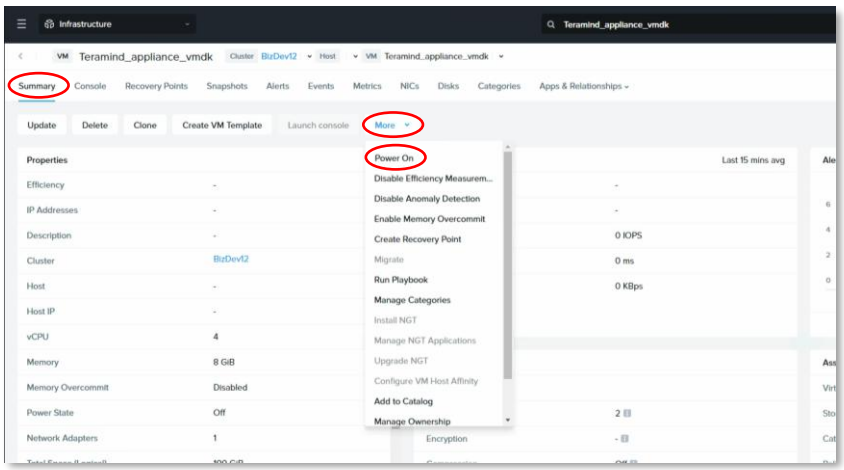
Otherwise, click the **Create VM** button. Your VM will be ready within a few seconds and you will be taken back to the *VMs* screen.



1.19 Launching the VM

On the *VMs* screen, locate the VM you just created. You can use the **filter** on top of the screen to quickly locate the VM.

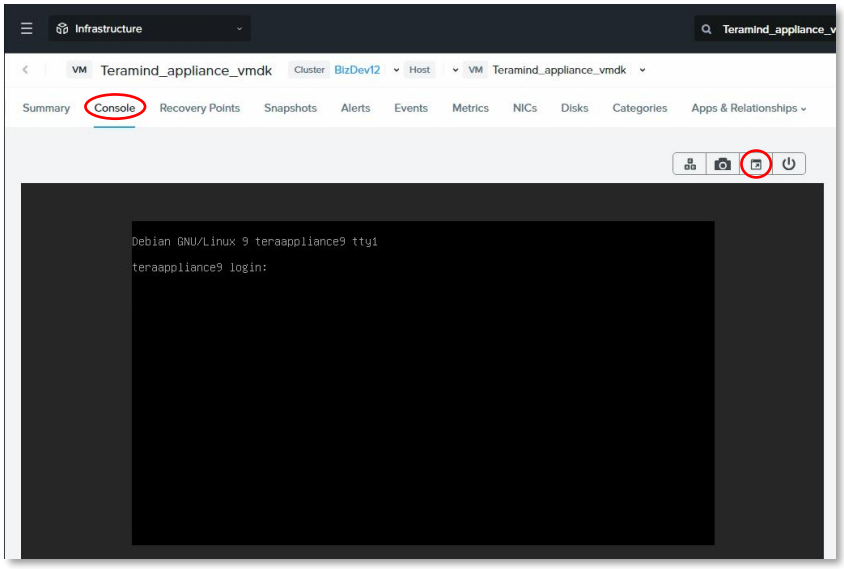
Click the **name** of the VM. It will take you to the VM's screen.



1.20 Powering Up the VM

On the VM's screen, select the **Summary** tab.

Click the **More** button and then select the **Power On** option from the drop-down menu. The VM will be powered on and become ready for use within a few seconds.



1.21 Preparing for Step 2

On the VM's configuration screen, select the **Console** tab.

The VM will boot up in a few seconds and you will be shown the login prompt.

You will now be able to set up the IP, network and assign machine role(s).

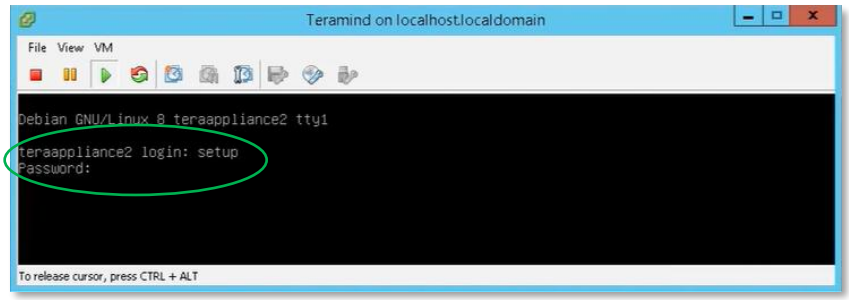
*Note: you can click the **Pop-Up Window** icon to open the Console in a separate window to make it easier to work with.*

Proceed to ***Step 2: Setting Up the IP, Network and Machine Role(s)*** to continue with the deployment process.

2 Setting Up the IP, Network and Machine Role(s)

If you have followed all the instructions in **Step** 1 correctly (for your chosen virtualization platform), you should now have a console window open for your VM. We will use this console window to configure IP and other network settings and the machine role.

> **Notes About the Console Window**
> The *Console* window on each VM environment may come with a different interface and features. However, the basic functionality is the same. The following commands to set up the Teramind server are the same, no matter which Console/VM environment you are using.

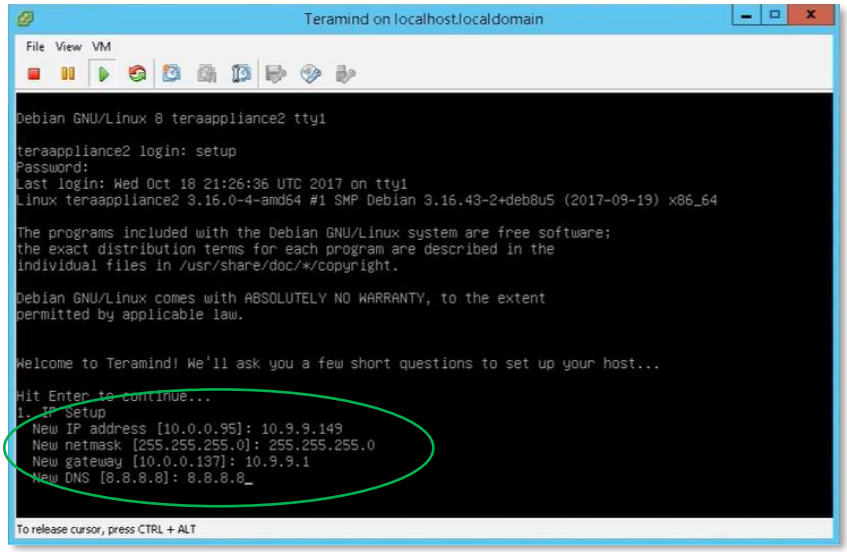


2.1 Logging into the VM

Log in using the following credentials:

- Username: setup
- Password: setup

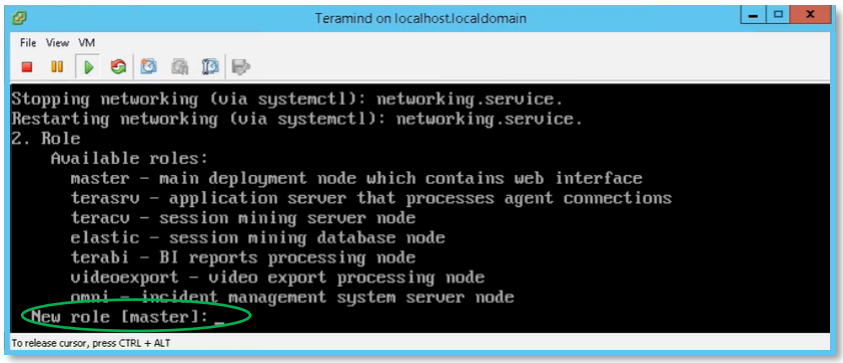
Press **Enter** to continue.



2.2 Entering Connection Details

When prompted, fill out the following information:

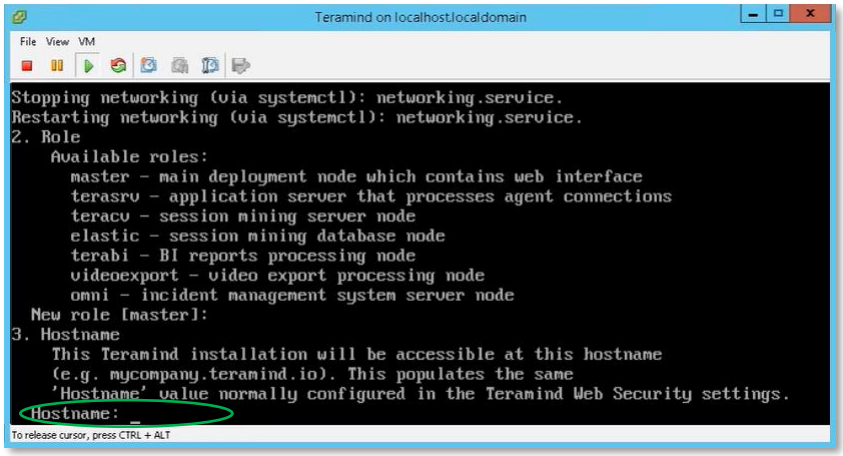
- IP address
- Netmask
- Default gateway (optional)
- Domain name server (DNS)



2.3 Setting VM Roles

Since this is a single-server deployment*, we will leave the default role to master when asked by the *New role [master]:* prompt.

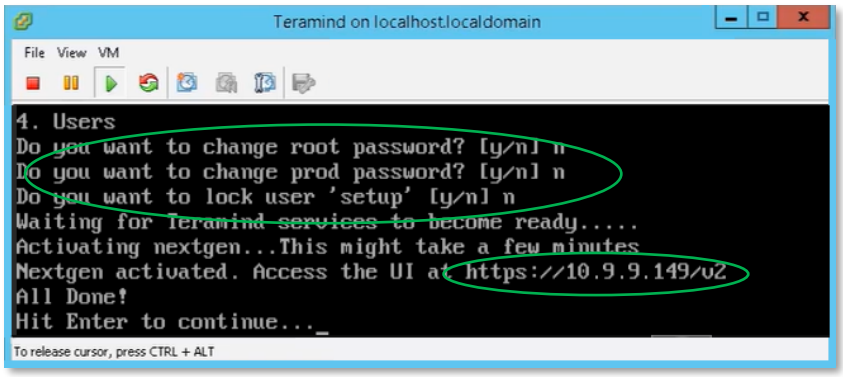
> **Check out this article for instructions on multi-node deployments.*



2.4 Setting the Hostname

In the *Hostname:* prompt, enter your hostname. Alternatively, you can use the IP address that you used in *Step 2.2 Entering the Connection Details*.

In this example, we will use the IP address (e.g., "`10.9.9.149`").



2.5 Setting User Passwords and Finishing the Console Session

Next, you will be prompted to change the root and prod passwords and to lock the setup user account. If you want to keep the default, press n to the prompt(s). If you do change them, please keep them in a secure place. You will need them for any future changes to your servers.

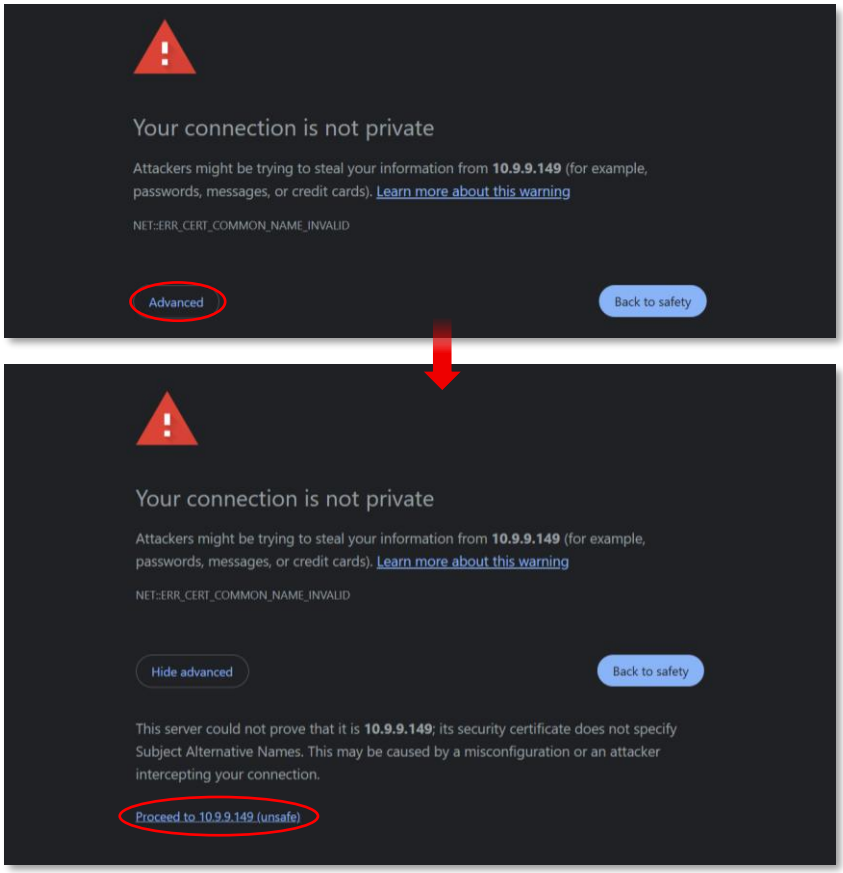
There might be a brief pause as the VM waits for the server to become ready. Then the *NextGen* activation will begin. It might take 1-3 minutes depending on machine. Once done, you will see the URL (e.g., "`https://10.9.9.149/v2`

” to access your Teramind Dashboard.

At this stage, we are done with setting up the server.

Proceed to ***Step 3: Setting Up the Account and Finishing Deployment*** to continue with the deployment process.

3 Setting Up the Account and Finishing Deployment

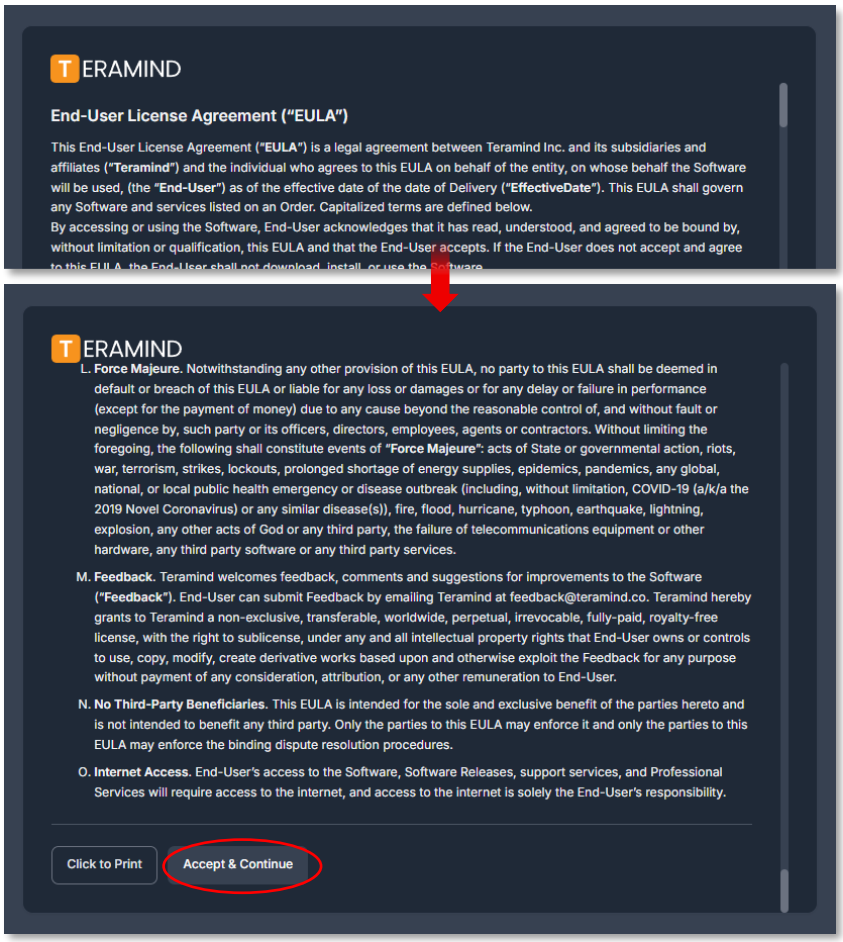


3.1 Accessing the Teramind Dashboard

Open your browser and type in the URL you received in *Step 2.5 Setting User Passwords and Finishing the Console Session*.

You might see a warning message on your browser saying the connection is not private or secure. This is normal. The warning is shown because you haven't assigned any SSL certificate to your server. You can upload your own certificate later from the Teramind Dashboard under Configurations > Settings > Security > *SSL* section.

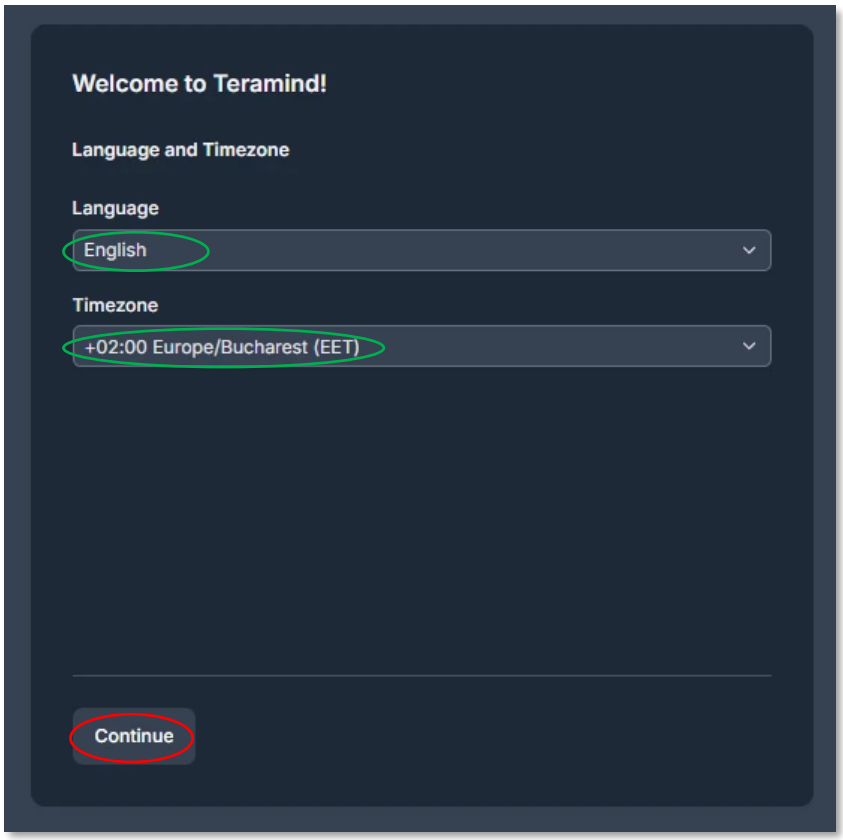
If you are using Google Chrome, you can click the **Advanced** button on the warning page and then click the **Proceed to…** link to continue. Other browsers have similar options to bypass the warning.



3.2 Accepting the EULA

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

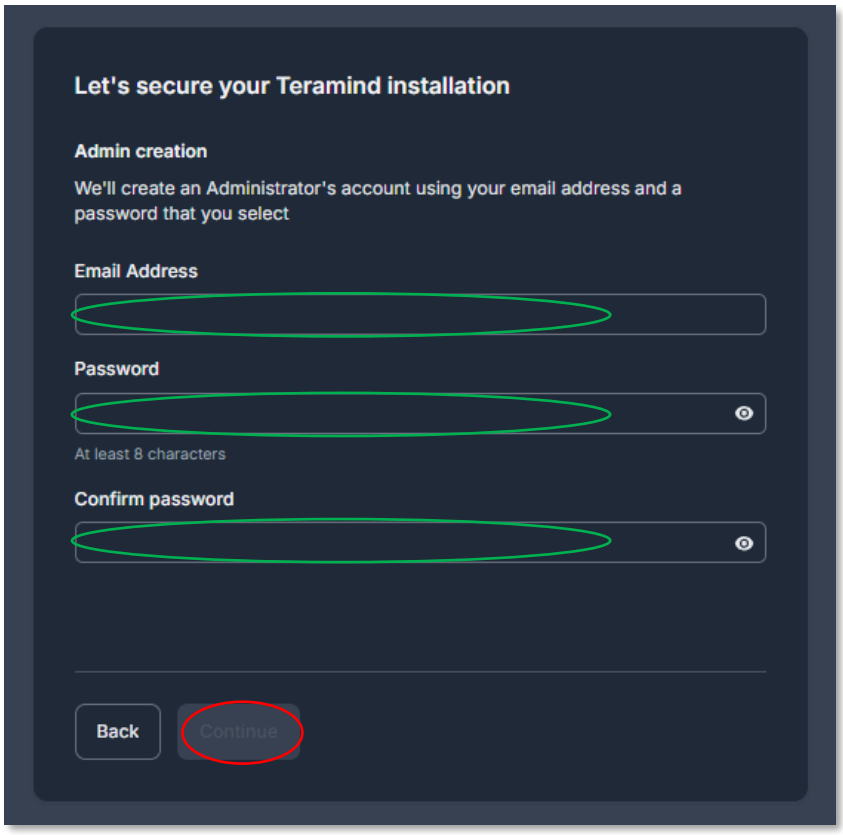
Scroll down and click the **Accept & Continue** button.



3.3 Setting the Language and Timezone

On the *Welcome to Teramind* screen, select your **Language** and **Timezone**.

Click **Continue**.

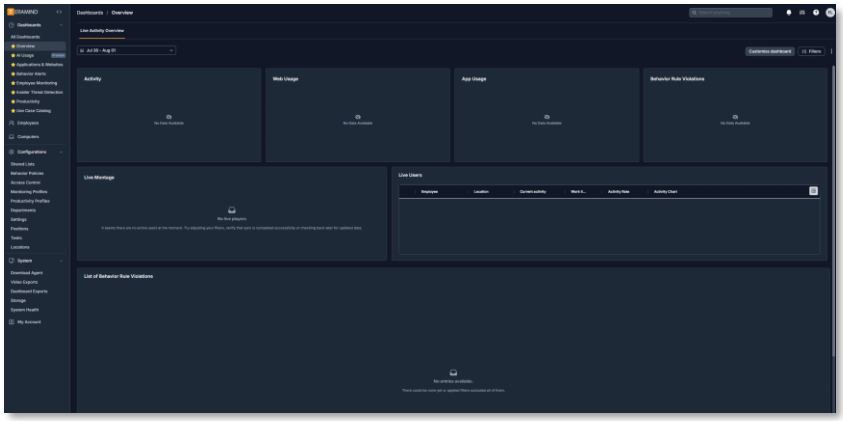


3.4 Setting Up Your Admin Account

On the *Lets secure your Teramind installation* screen, enter an **Email address**, specify a **Password** and enter the same password in the **Confirm password** field.

This credential will be used for your admin account.

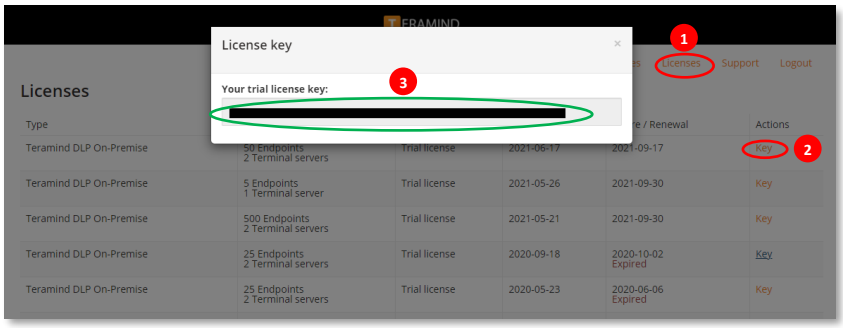
Click **Continue**.



3.5 Viewing the Dashboard

You will now see your Teramind Dashboard.

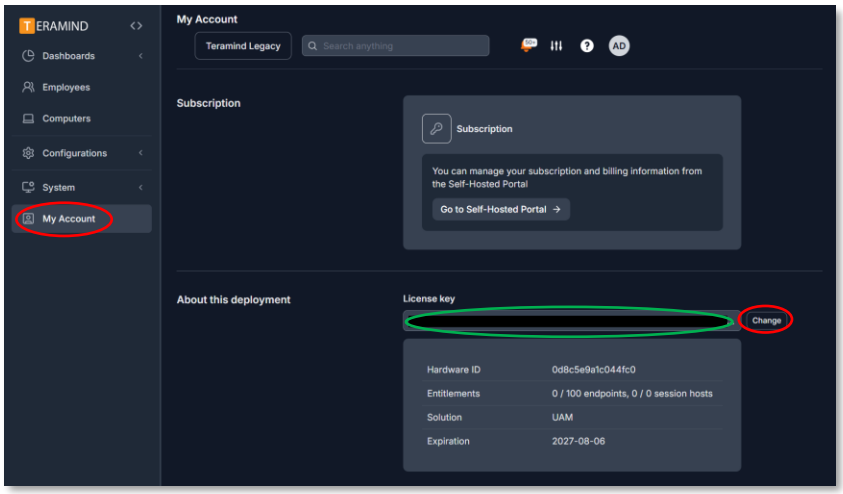
Next, you will need to enter your license key.



3.6 Getting Your License Key

Open a separate browser tab and log into the Self-Hosted Portal at: https://www.teramind.co/portal. Login with the admin email and password.

1. Click the **Licenses** tab.
2. From the list of licenses, click the **Key** link under the *Actions* column. A pop-up will display the license key.
3. Copy **Your trial license key** or write it down.



3.7 Entering the License Key

Go back to your Teramind Dashboard.

Navigate to **My Account** from the menu on the left.

Under the *About this deployment* section, type/paste the key you copied in the previous step in the **License key** field.

Click the **Change** button.

Note: *You can add/update your license later. Check out this article in our Knowledge Base to learn how to change your license key.*

Additional Steps:

- If you have added a recording disk to your Teramind VM then there are some additional steps needed to finish provisioning the recording disk. Please refer to this link for the remaining steps to provision the recording disk.
- If you instead are using NFS storage, then please refer to this link for the steps to mount an NFS share.

Note: The commands in the above two links will require logging into the Teramind server VM as either the ‘prod’ or ‘root’ user accounts. If you do not already have these credentials, please reach out to Teramind’s support team to obtain the On-Premises credentials

At this stage, you are done deploying your Teramind Server. If you want to use the OCR feature, follow the instructions under the OCR Deployment section below.

4 Installing the Teramind Agent

Teramind Agent can be installed both locally and remotely. Please check out the Usage & Deployment Guides > System > Download Agent section in our Knowledge Base.

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.

Here are a few important configurations you should consider:

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 **My Account** screen.

Check out this article for help

Updating the Server

Check out this article to learn how to update your server.

Updating the BI Classifications Package

The BI Classification package(TeraCat) is used to automatically classify apps and websites into categories like "News", "Bulleting Board", "Native App", etc. and are used to populate dashboard columns/dimensions like *Category*, *Security Category*, *Reputation*, etc. The categories are also available for selection as *Rule Objects* in Productivity Profiles.

Keeping the classification package up to date ensures you have the latest classifications across these features.

Check out this article to learn how to update your BI Classifications.

> If you do not wish to use the BI classifications feature, please contact us to disable it.

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 Configurations > Settings > Active Directory tab.

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 Configurations > Settings > SMTP screen.

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.

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

For more information on how to use a third-party certificate with your instance, please check out this article on the Teramind Knowledge Base.

To learn how to generate your own self-signed certificates and use it with Teramind, check out this article.

OCR Deployment

OCR (Optical Character Recognition) allows you to detect text inside images or videos. You will need to set up OCR nodes for OCR features such as OCR Search and OCR Rules to work.

To set up OCR you will need one *Session Mining* node and at least one *Session Mining Database* node. These nodes will communicate with the master node and with each other.

Please make sure the following ports are enabled and open among all nodes (*Master*, *Session Mining* and *Session Mining Database*): **443**, **5432**, **9200, 42001** and **50051**.

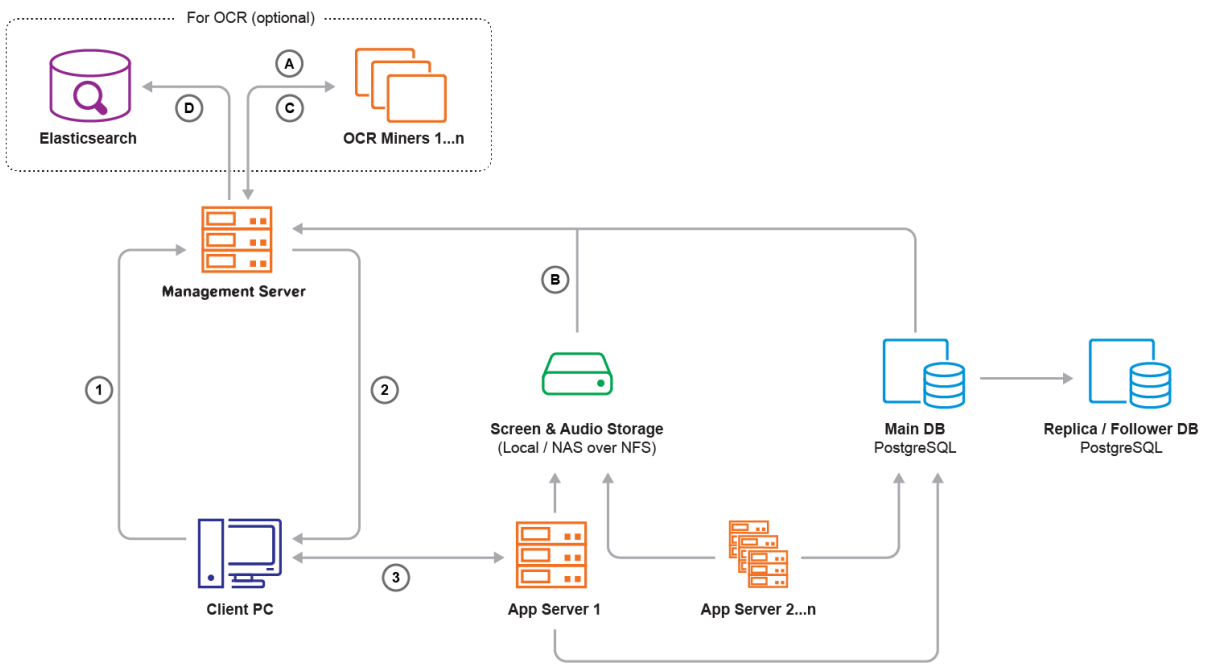
You can change the machine's role in *Step 2.3 Setting the VM Role*. Instead of entering `master`, enter `teracv` for creating a *Session Mining* node and `elastic` for creating a *Session Mining Database* node.

After setting the machine role and specifying the master node's IP address you will see the OCR node approval requests on the dashboard. For more information, check out the Configurations > Settings > Server section in the Teramind User Guide.

Multi-Node Deployment

Check out this article for instructions on multi-node deployments: How to Set Up an On-Premises Multi-Node Deployment.

Architecture



Legends:

1. Teramind Agent asks Management Server (Master Node) for an Application Server IP and port
2. Management Server (Master Node) responds
3. Teramind Agent connects to the assigned Application Server

A. OCR Miner talks to the Management Server (Master Node) and asks for a record to process
B. Management Server (Master Node) fetches a screen file from the 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 (Master Node)
D. Management Server (Master Node) writes the OCR result text to Elasticsearch

The **Management Server** (Master Node) 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.

Installation Support and Troubleshooting

Chat	From our website: https://teramind.co/
Email	support@teramind.co