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# Sophos Endpoint Security and Control standalone startup guide

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# 1 About this guide

This guide tells you how to install and configure Sophos Endpoint Security and Control on a standalone computer.

The guide is for you if your computer is not connected to your organization's network.

If you are an administrator and want to install and configure Sophos Endpoint Security and Control on a network, see the documentation for your Sophos management software instead. If you use Enterprise Console, see the *Sophos Enterprise Console quick startup guide* and *Sophos Enterprise Console policy setup guide*. The guides are available at

<http://www.sophos.com/en-us/support/documentation/enterprise-console.aspx>. For information about how to set up your home users, see

<http://www.sophos.com/en-us/support/knowledgebase/63182.aspx>.

## 2 Before you begin

### 2.1 System requirements

For system requirements, go to the system requirements page of the Sophos website ([www.sophos.com/en-us/products/all-system-requirements.aspx](http://www.sophos.com/en-us/products/all-system-requirements.aspx)).

You must have internet access in order to download the installation software from the Sophos website.

### 2.2 What you will need

You will need the following information for installation and configuration:

- Web address and download credentials for the Sophos Endpoint Security and Control standalone installer.
- Address of the update source, unless you will be updating from Sophos directly.
- Credentials that are needed to access the update source.
- Details of the proxy server that you may be using to access the update source (the address and port number, the user credentials).

## 3 Install Sophos Endpoint Security and Control

You must log on as an administrator to install Sophos Endpoint Security and Control.

If you have third-party security software installed:

- Ensure that its user interface is closed.
  - Ensure that third-party firewall and HIPS software is turned off or configured to allow the Sophos installer to run.
1. Using the web address and download credentials supplied by Sophos or by your system administrator, go to the website and download the standalone installer for your version of Windows.
  2. Locate the installer in the folder where it was downloaded. Double-click the installer.
  3. On the first page of the **Sophos Endpoint Security and Control installation wizard**, click **Next**.
  4. On the **License Agreement** page, click **I accept the terms in the license agreement** if you agree to the terms and want to continue. Click **Next**.
  5. On the **Destination folder** page, if necessary, change the folder to which Sophos Endpoint Security and Control will be installed. Click **Next**.
  6. On the **Update source** page, enter the location from which the computer will get updates. Sophos recommends that you do this now.
    - a) In the **Address** box, select **Sophos** or, if your system administrator has given you an address, enter that address.
    - b) In the **Username** and **Password** boxes, type the username and password that is needed to access the update source provided by Sophos or by your system administrator.
    - c) If you access the network or internet via a proxy, select the **Access the update source via a proxy** checkbox, click **Next** to enter the proxy details.

**Note:** To enter the update source later, select the **I will enter these details later** check box. After the installation is complete, open Sophos Endpoint Security and Control and select **Configure updating**.

By default, Sophos Endpoint Security and Control will update itself every 60 minutes, provided the update source details are provided and the computer is connected to the network.

7. On the **Select additional components to install** page, select the **Install Sophos Client Firewall** check box if you want to install firewall and click **Next**.
8. On the **Remove third-party security software** page, select the **Remove third-party security software** check box if you have a third-party anti-virus or firewall software installed and click **Next**.

9. On the **Ready to install Sophos Endpoint Security and Control** page, click **Next**.

You should see the software being installed on your computer.

**Important:** Third-party security software removal does not, by default, remove the associated update tools, because other third-party security software might still be using them. However, if they are not being used, you can remove them via Control Panel.

10. On the last page of the install wizard, choose whether to restart the computer and click **Finish**.

You need to restart the computer:



- To enable the firewall.
- To complete the removal of third-party security software.

Installation of Sophos Endpoint Security and Control is complete when the Sophos Endpoint Security and Control icon is displayed in the notification area, at the far right of the taskbar.



### 3.1 What do the notification area icons mean?

The Sophos Endpoint Security and Control icon in the notification area, at the far right of the taskbar, changes if there are pending alerts, or a problem with protection against threats. The following table lists the icons that are displayed and the reasons why.

Icon	Reason
	<ul style="list-style-type: none"><li>▪ When on-access scanning is not running on your computer.</li><li>▪ When a firewall message is displayed.</li><li>▪ When a controlled application message is displayed.</li><li>▪ When a device control message is displayed.</li><li>▪ When a data control message is displayed.</li><li>▪ When a website is blocked.</li></ul>
	<ul style="list-style-type: none"><li>▪ When Sophos Endpoint Security and Control fails to update itself.</li><li>▪ When a Sophos service has failed.</li></ul>

A notification appears along with one of the above icons that explains the cause.

For example, if on-access scanning is not enabled on your computer, the **On-access scanning disabled** notification is displayed.

## 4 Configure the firewall

You must configure the firewall to:

- Allow applications that you use and other essential applications, such as Windows Update, to access the network or internet.
- Block unknown applications.

There are different ways of allowing applications, depending on which version of Windows you are using. On Windows 7 and earlier you can use interactive mode. On Windows 8 and later the interactive mode is not available, so you need to use other methods.

### 4.1 Allow applications on Windows 7 or earlier

#### 4.1.1 Deal with firewall messages

By default, Sophos Client Firewall for Windows 7 and earlier is in “interactive” mode, which means that it displays a message each time an unknown application or service requests network access. The message asks you whether to allow the traffic once, block it once, or whether to create a rule for that type of traffic.

To get started, when a firewall message is displayed, block the unknown traffic once, for just that occasion. For example, if the firewall displays a message about a hidden process, click **Block this process this time** and click **OK**.

If you are unable to block traffic for just that occasion, the application generating the traffic might not have been identified. In such a case, choose either allow or block, as appropriate. You can change it again later by editing the firewall configuration. For more information, see the *Sophos Endpoint Security and Control Help*.

There are some cases in which you should not block the traffic. For example, if you see a message about your browser, email program, or other applications for internet/intranet access, you should select the option to add a checksum or create a rule.

#### 4.1.2 Enable applications to access the network or internet

You must enable the firewall to allow the applications that you use and other essential applications, such as Windows Update, to access the network or internet.

1. Open the program for which you want to allow network or internet access, such as a browser or email program.
2. The firewall displays a message informing you that a new or modified application has requested network access. Click **Add the checksum to existing checksums for this application** and click **OK**.

3. The firewall displays a second message informing you that an application (such as your browser or email program) has requested network access. Click **Create rule for this application using preset**, and ensure you select the appropriate setting for the program (such as **Browser**, **Email Client**) in the box, and click **OK**.

To enable FTP download, see the *Sophos Endpoint Security and Control Help*.

You can also edit the firewall configuration to enable applications access the network or internet in any mode. For information, see the *Sophos Endpoint Security and Control Help*.

## 4.2 Allow applications on Windows 8 or later

In Sophos Client Firewall for Windows 8 and later, that doesn't have an interactive mode, use one of the following ways to allow applications to access the network or internet:

- Allow applications one by one.
- Import firewall configuration from another computer.

### 4.2.1 Allow applications one by one

You can add applications one by one in Sophos Endpoint Security and Control as follows.

1. On the **Home** page, under **Firewall**, click **Configure firewall**.
2. Under **Configurations**, click **Configure** next to the location that you want to configure.
3. Click the **Applications** tab.
4. Click **Add**, locate the application, and then double-click it.

The application is allowed as trusted. For greater security, you can apply one or more application rules to specify the conditions under which the application can run. For more information about application rules, see the *Sophos Endpoint Security and Control Help*.

### 4.2.2 Import firewall configuration from another computer

If you have several standalone Windows 8 or later computers running the same set of applications, and you want them to use the same firewall rules, you can set up the firewall on one of the computers (as described in [Allow applications one by one](#) (page 8)) and export the firewall configuration for use on the other computers.

**Note:** If your organization uses Sophos Enterprise Console to manage security settings on endpoint computers, the console administrator can export a centrally configured firewall policy for use on endpoint computers. Please note, however, that some of the options in a centrally configured firewall policy may not work on Windows 8 or later computers.

To use firewall configuration from another computer:

1. After you have set up the firewall on a Windows 8 or later computer, export the configuration file. In Sophos Endpoint Security and Control, on the **Home** page, under **Firewall**, click **Configure firewall**. In the **Firewall configuration** dialog box, click **Export**. Give your configuration file a name and location, and then click **Save**.



2. Go to another computer on which you want to use the configuration. In Sophos Endpoint Security and Control, on the **Home** page, under **Firewall**, click **Configure firewall**. In the **Firewall configuration** dialog box, click **Import**. Select a configuration file and click **Open**. Accept the default settings, unless you need to change any of those, and click **OK**.
3. Review the firewall configuration and edit the rules, if necessary.

For more information about exporting and importing firewall configuration, see the *Sophos Endpoint Security and Control Help*.

## 4.3 Block unknown applications

You should now enable the firewall to deal with traffic automatically and block unknown applications.

1. In the notification area, at the far right of the taskbar, right-click the Sophos Endpoint Security and Control icon to display a menu. Select **Open Sophos Endpoint Security and Control**.
2. In the **Sophos Endpoint Security and Control** window, in the **Firewall** section, click **Configure firewall**.

The **Firewall configuration** dialog box is displayed.

3. In the **General** tab, under **Configuration**, click **Configure**.
4. In the location configuration dialog box, in the **Working mode** section, select **Block by default - all traffic which has no matching rule is blocked**.

The firewall will log unknown traffic that it encounters in its log. You can also enable notifications (balloon messages on Windows 7 or earlier or toast notifications on Windows 8 or later) when firewall detects unauthorized traffic. For more information, see the *Sophos Endpoint Security and Control Help*.

## 5 Technical support

You can find technical support for Sophos products in any of these ways:

- Visit the SophosTalk community at [community.sophos.com/](https://community.sophos.com/) and search for other users who are experiencing the same problem.
- Visit the Sophos support knowledgebase at [www.sophos.com/en-us/support.aspx](https://www.sophos.com/en-us/support.aspx).
- Download the product documentation at [www.sophos.com/en-us/support/documentation.aspx](https://www.sophos.com/en-us/support/documentation.aspx).
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ICU version 1.8.1 or later

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## pstdint

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