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Introduction

This document describes how to configure the All-In-One (AIO) self-hosted application.

To create a self-hosted environment where your data and security is completely protected, you will use an Amazon Machine Image (AMI) to configure an Amazon Elastic Compute Cloud (EC2) instance in your own virtual private cloud (VPC) that will contain all the application components:

- Web Console: how you will log into and use the application
- Scheduler and workers: the background processes that collect and store your AWS data
- RDS database: a Microsoft SQL® server database where your data gets stored
- IAM role: allows you to connect to your AWS account(s)

Note: These instructions require you to record key information generated from your configuration in AWS. For your convenience, use the Required Information section at the back of this document to record the data. Items you may wish to copy are highlighted in yellow.



Configure Services and Resources in AWS

Before the self-hosted application can access your AWS accounts, you need to create AWS credentials.

While a cross-account role is the preferred method for creating AWS credentials, the self-hosted application requires that you first create AWS Identity and Access Management (IAM) users as part of your back-end configuration. AWS will generate a unique access key and secret key for each IAM user. When you plug these keys into the Application-wide Configuration page, you enable the self-hosted application to collect the latest AWS pricing data.

This section will show you how to:

- create an IAM policy that will allow the self-hosted application to access AWS pricing data
- create an IAM user group and attach the pricing policy
- create an IAM user and add them to your user group

As a best practice, we recommend that you complete these steps in the prescribed order.

Note: To ensure that your self-hosted application contains a good cross-section of availability zones and pricing data, you must create each IAM user in a separate AWS account.

Create an IAM Policy

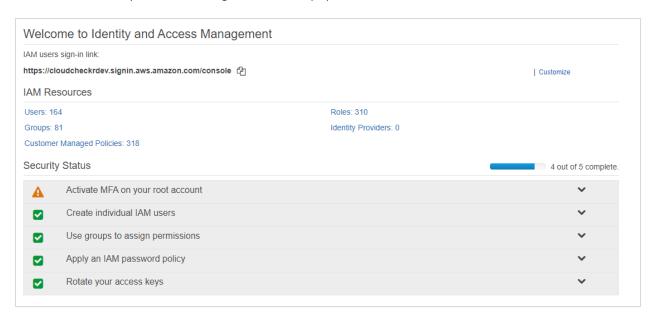
In this procedure, you will create an IAM policy that will allow the self-hosted application to access the AWS pricing data.

- 1. Launch the AWS Management Console associated with your first AWS account.
- From the AWS Services page, scroll down to the Security, Identity & Compliance section and select IAM.

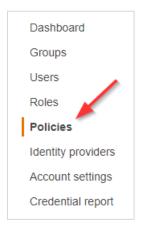




The Welcome to Identity and Access Management screen displays.



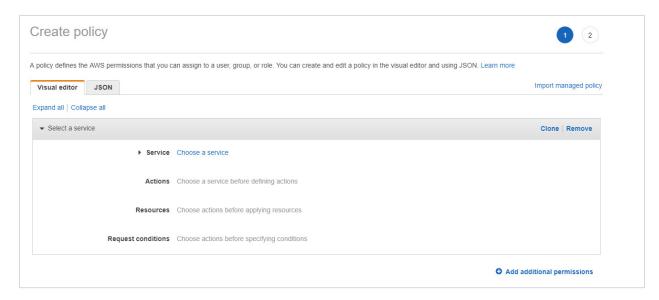
From the dashboard, click **Policies**.



A list of policies displays.

4. Click Create policy.

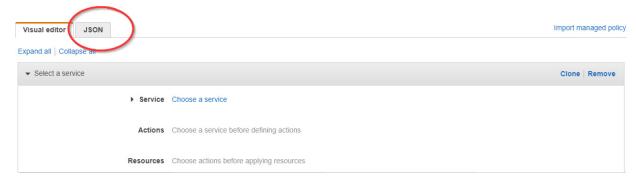
5. The Create Policy page opens.



- 6. Follow the example in this step to see how to create the pricing policy:
 - a. Copy the permissions for the Pricing policy:

```
"Version": "2012-10-17",
   "Statement":[
      {
         "Sid": "Stmt1470231538000",
         "Effect": "Allow",
         "Action":[
            "ec2:DescribeSpotPriceHistory",
            "ec2:DescribeAvailabilityZones"
         ],
         "Resource":"*"
      }
   ]
}
```

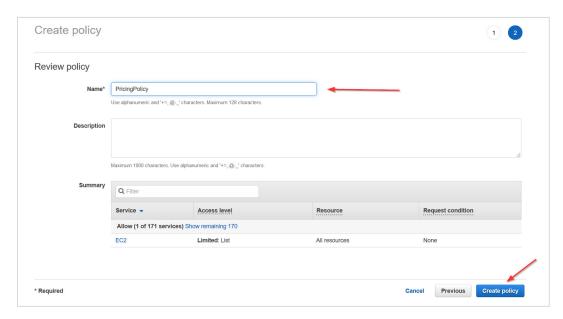
- Return to the Create Policy page in the AWS Management Console. b.
- Click the JSON tab.



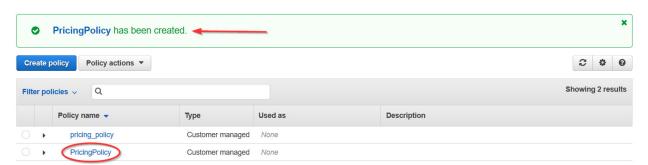
The JSON tab opens, allowing you to create a policy using JSON syntax.



- Replace the text in the JSON tab with the policy you just copied. d.
- Click Review policy. The Review policy page opens. e.
- Type a name for the policy and click Create policy.



A message indicates that AWS has created your policy.



- 7. Repeat steps 1-6 to create a policy for the remaining two AWS accounts.
- 8. Copy the pricing policy name to the <u>Required Information</u> section.

Create an IAM User Group

An IAM user group allows you to apply group permissions to all users in that group automatically.

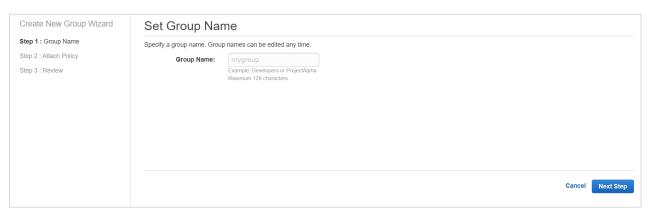
In this procedure, you will create an IAM user group and attach the policy you created in the Create an IAM Policy section.

- 1. From the AWS Services page, scroll down to the Security, Identity & Compliance section and select IAM. The Welcome to Identity and Access Management screen displays.
- 2. From the dashboard, click **Groups**.



A list of groups displays.

3. Click Create New Group. The Create New Group wizard opens.



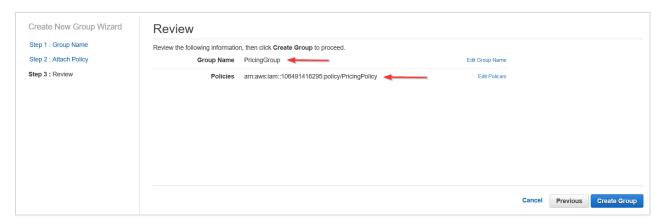
4. Type a group name. Click Next Step.

A list of policies displays.



- 5. Select the checkbox next to the pricing policy that you configured in the Create an IAM Policy section.
- 6. Click Next Step.

The page displays your group name and the attached policies. For the purposes of this procedure, we named the new IAM group PricingGroup.



7. Click Create Group.

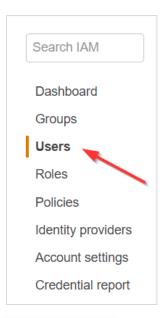
AWS adds your new IAM user group to the list.

- 8. Repeat steps 1-7 to create IAM user groups for the remaining two AWS accounts.
- 9. Copy the IAM group names to the Required Information section.

Create an IAM User

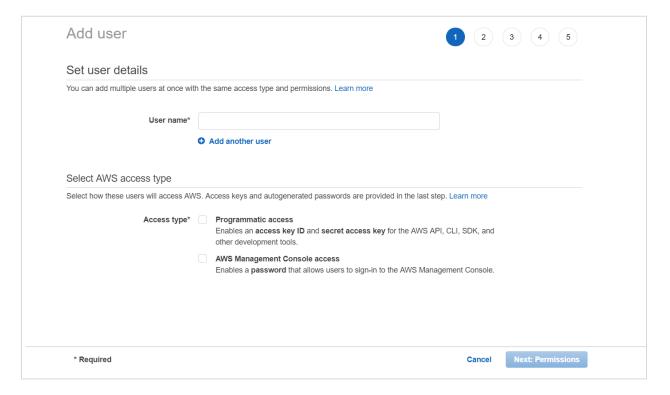
This procedure will show you how to create an IAM user in AWS.

- 1. From the AWS Services page, scroll down to the Security, Identity & Compliance section and select IAM. The Welcome to Identity and Access Management screen displays.
- 2. From the dashboard, click Users.



A list of users displays.

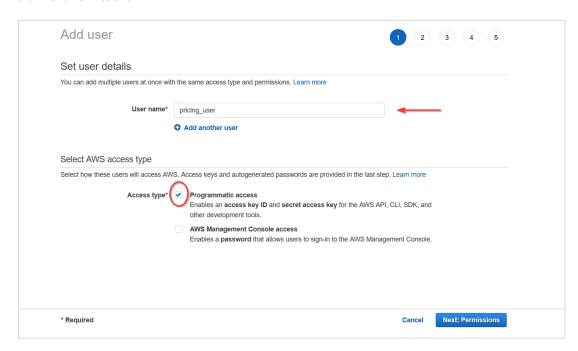
3. Click Add user. The Add User wizard opens.





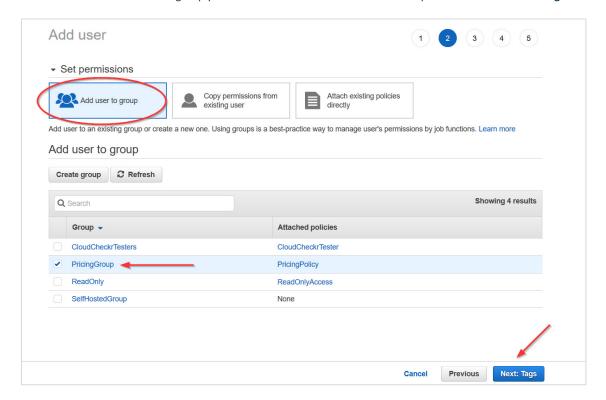
4. On this screen:

- Type a username.
- Select the **Programmatic access** check box so you can generate access and secret keys.
- Click Next: Permissions.



The Set permissions screen displays. The Add user to group button is selected by default.

5. Select the checkbox next to the group you created in the Create an IAM User Group section and click Next: Tags.

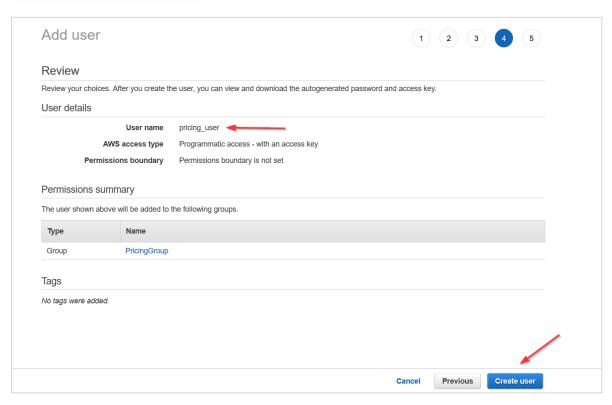




The Add tags page, which is optional, displays. For the purposes of this procedure, we will not add tags.

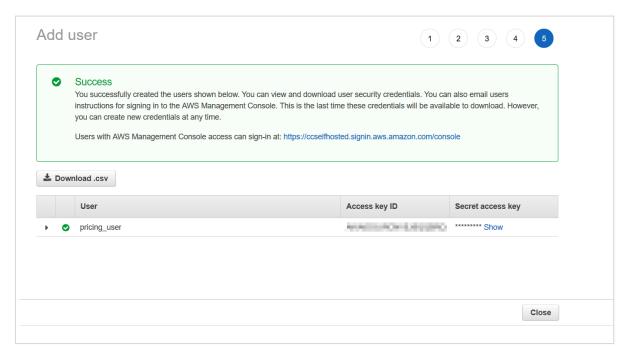
6. Click Next: Review.

This page displays the name of the user.



7. Click Create user.

A message lets you know that AWS created the user and the associated access and secret keys.





8. Click **Download .csv** to save the keys to a secure location and click **Close**.

Note: This is the only time these unique values are available for download or to copy. However, if you misplace them, you or your administrator can create new access and secret keys. See this AWS topic for more details.

- 9. Repeat steps 1-8 for the remaining two AWS accounts.
- 10. For each of the three IAM users, copy the username, access key, and secret key to the Required Information section.

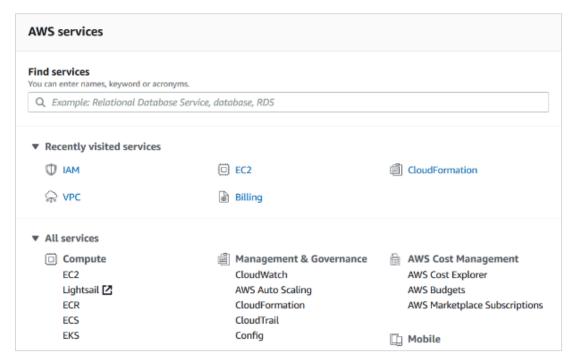


Launch the Self-Hosted AMI

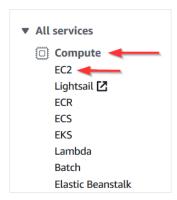
Once your sales representative has informed you that your AMI is available, you will need to launch it in AWS to begin the configuration process.

1. Log into the AWS Management Console.

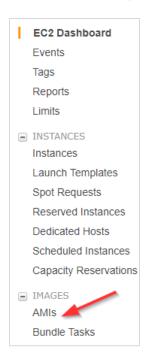
The AWS services page opens.



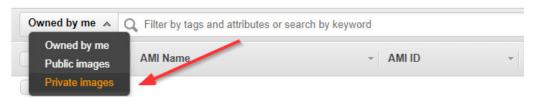
2. From the middle of the page, choose **Compute > EC2**.



3. From the EC2 Dashboard, select Images > AMIs.



Click the drop-down arrow next to **Owned by me** and select **Private images**.

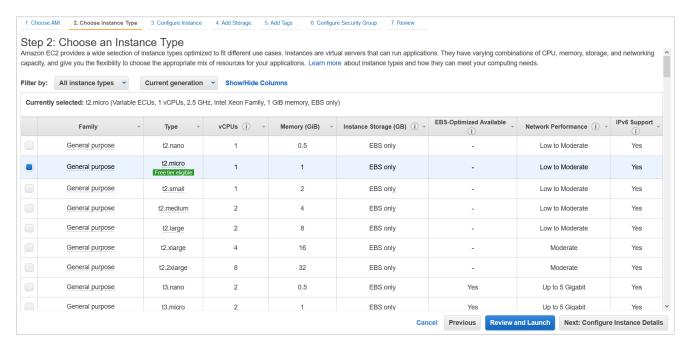


Select the radio button next to the private offering identified by your sales representative and click Launch.



Configure the EC2 Instance

After you click Launch, AWS opens a template where you can configure the software settings for your EC2 instance. Since you already purchased the AMI, Step 1, Choose AMI, is complete. Step 2: Choose an Instance Type is where you choose the type of EC2 instance, which is the virtual server where the self-hosted application will run.



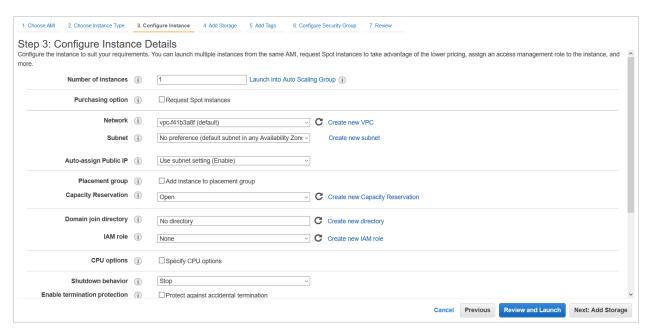
Select the checkbox next to c5.large.

Note: This suggestion is designed to keep your costs down without sacrificing any performance in the self-hosted product. However, you must continue to monitor the cost and performance of your EC2 instance and modify your instance type to determine what works best in your deployment.

Click Next: Configure Instance Details.



Step 3: Configure Instance Details is where you configure your software and network requirements.



At a minimum, configure the following settings:

Option	Description	Action
Network	An isolated virtual network dedicated to your AWS account where you will launch your EC2 instance.	Select the network that contains your virtual private cloud (VPC).
Subnet	A range of IP addresses in your VPC	When you select a VPC, the subnet associated with that VPC will autopopulate this field.

For the configuration of the self-hosted version, you can leave all other settings in their default state.

4. Click Next: Add Storage.

Step 4: Add Storage displays. This step is where you verify that you have the right volume and device, which make up the D: drive for your self-hosted application.

5. Verify the settings in their default state and modify as necessary:

Volume Type: EBS

Device: xvdf

Size: 500 GiB



6. Click Next: Add Tags.

Step 5: Add Tags displays. This step is where you configure tags that will allow you to label and better manage your resources. For the configuration of the self-hosted version, we will not add any tags.

7. Click Next: Configure Security Group.

Step 6: Configure Security Group displays. This step is where you can configure the security group that will control traffic in and out of your EC2 instance. If users can access your EC2 instance from the public internet, it is very important that you use security groups to manage access.

8. Select one of the configuration methods:

To create a new security group:

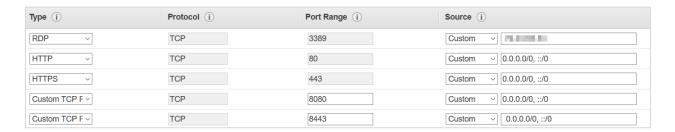
- a. Select the Create a new security group radio button.
- b. Click Add Rule and create each of the following rules:

Rule #	Purpose	Туре	Protocol	Port Range	Source
1	Access self-hosted from a remote desktop	RDP	ТСР	3389	Your IP address
2	Access self-hosted version from a browser	HTTP	TCP	80	0.0.0.0/0
3	Access self-hosted version from a browser	HTTPS	ТСР	443	0.0.0.0/0
4	Required for Web installer to run in on this port in HTTP	Custom TCP Rule	ТСР	8080	0.0.0.0/0
5	Required for Web installer to run on this port in HTTPS	Custom TCP Rule	TCP	8443	0.0.0.0/0

Note: Your security configuration may include the RDP rule by default; if that is true, make sure to add your IP address in the Source text field.

Note: For all the rules, keep the default drop-down menu setting of **Custom** in the Source column.

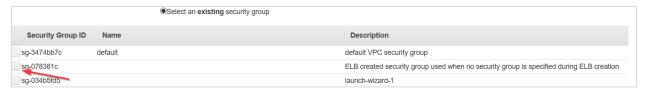
This screenshot shows what the page should display if you add the recommended rules:





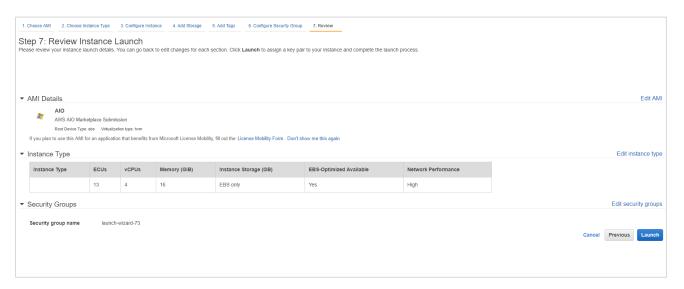
To use an existing security group:

- Select the **Select an existing security group** radio button.
- Select the checkbox(es) next to the security groups you want to associate with your EC2 instance.



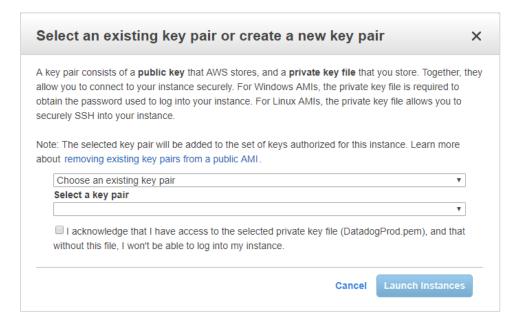
9. Once you have configured your security group(s), click **Review and Launch**.

Step 7: Review Instance Launch is where you will finalize your EC2 configuration.



10. Click Launch.

The Select an existing key pair or create a new key pair dialog box opens.





11. From the first drop-down menu, select Choose an existing key pair or create a new key pair.

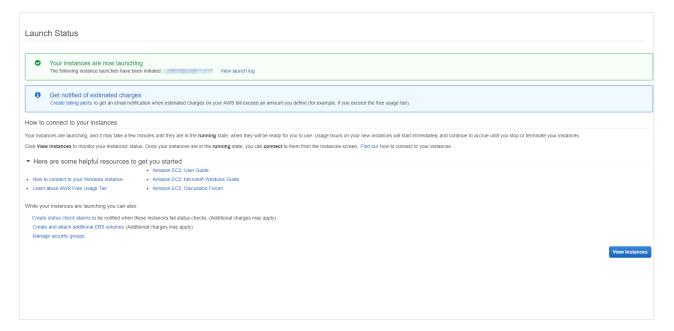
To choose an existing key pair:

- a. Verify that **Choose an existing key pair** is selected in the top drop-down menu.
- b. In the Select a key pair drop-down menu, select an existing key pair.
- Select the I acknowledge... checkbox.

To create a new key pair:

- In the top drop-down menu, select Create a new key pair. The Key pair name text box displays.
- b. In the Key pair name text box, type the name of the key pair.
- c. Click **Download Key Pair**. A .PEM file will download to your desktop.
- d. Save the .PEM file because you will not be able to generate it again.
- 12. Click Launch Instances.

The Launch Status screen displays.

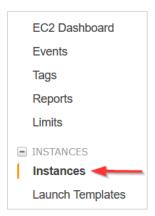


This page will indicate when your EC2 instance is available. Depending on the size and scale of your deployment, it should launch within 5 to 10 minutes.

13. Once the new E2 instance is generated, go back to the EC2 dashboard.



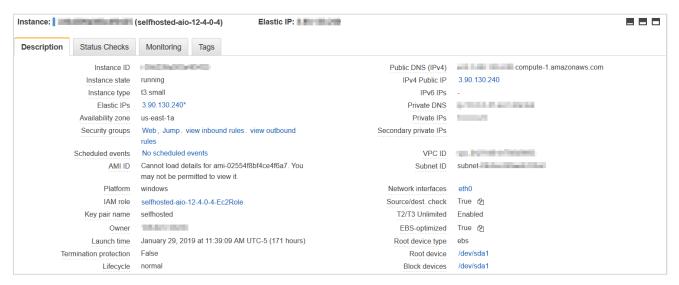
14. Select Instances > Instances.



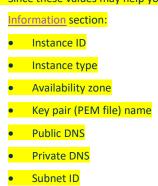
The list of instances displays.

15. Select the checkbox next to your Web console EC2 instance.

The Description tab displays details about your selected EC2 instance.



16. Since these values may help you troubleshoot potential installation or performance issues, copy them to the Required



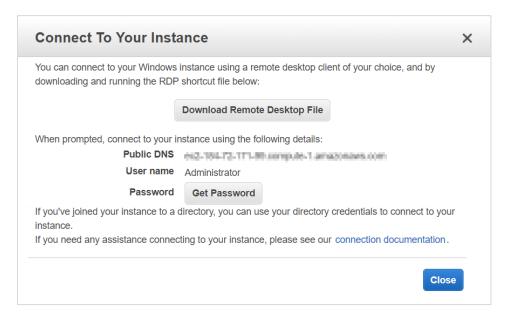
Install the Self-Hosted App

This section shows you how to install the EC2 instance.

By connecting to each EC2 instance through a Remote Desktop session, you can better manage the installation process and troubleshoot any issues that may occur.

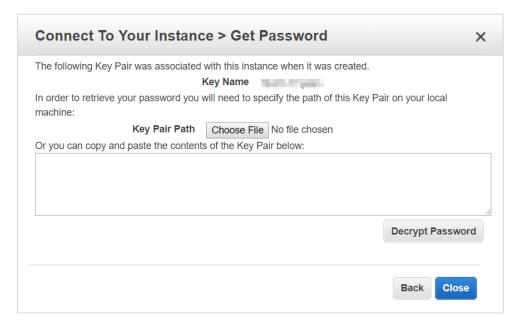
- 1. From your EC2 list in AWS, make sure that your Web Console EC2 instance is selected.
- 2. Right-click and select Connect from the fly-out menu.

The Connect To Your Instance dialog box opens.



Click Get Password.

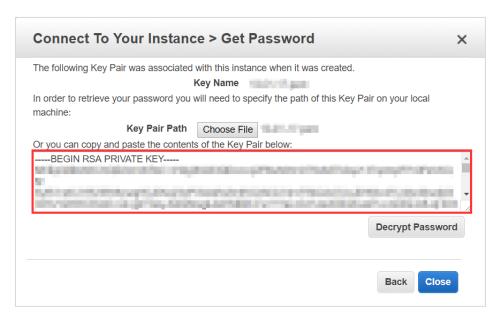
The Connect Your Instance > Get Password dialog box opens.





- 4. Click **Choose File** and navigate to location where you saved the .PEM file.
- 5. Click Open.

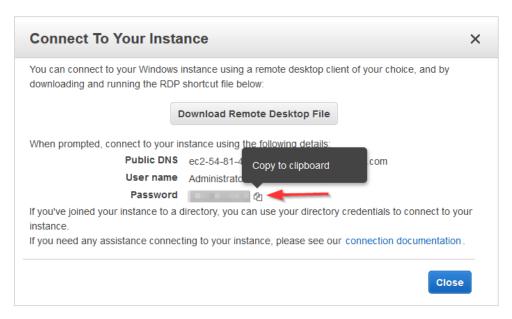
The contents of the file are copied over to the blank text box in the dialog box.



6. Click Decrypt Password.

The default administrator password displays.

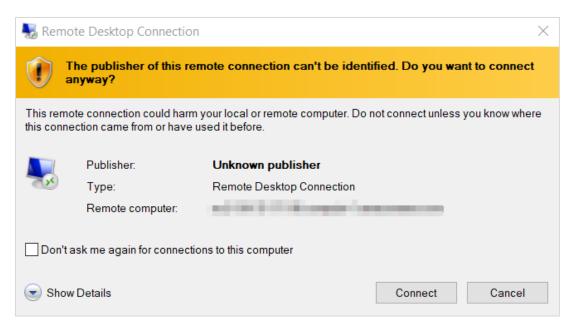
- 7. Hover to the right of the administrator password to display the Copy to clipboard icon.
- Click do to save the password.



- 9. Click Download Remote Desktop File.
- 10. Open or save the .RDP file.



The Remote Desktop Connection dialog box opens.



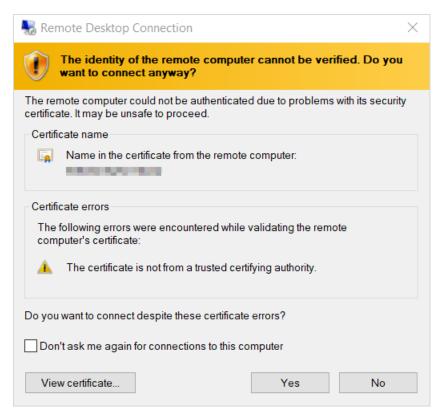
11. Click Connect.

The next dialog box prompts you to provide your password.



12. In the Administrator text field, paste the password you copied earlier and click **OK**.

The next dialog box prompts you to verify that you want to connect remotely.



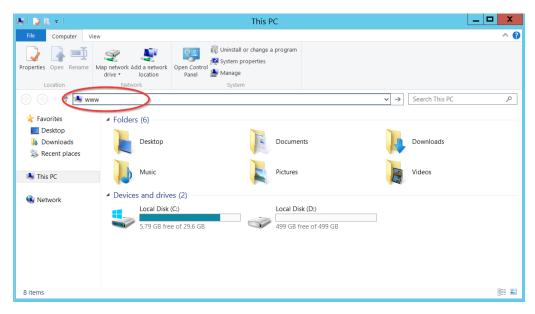
13. Click Yes.

Your Remote Desktop session launches.

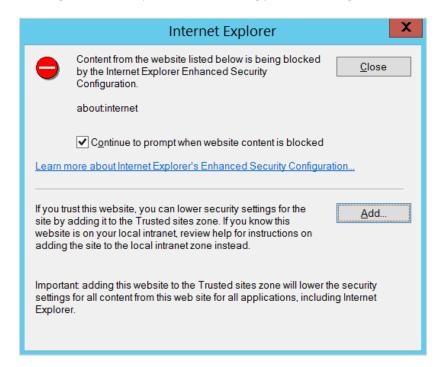




- 14. From the taskbar, click the **Folder** icon.
- 15. Type www in the search bar to open your browser and press Enter.

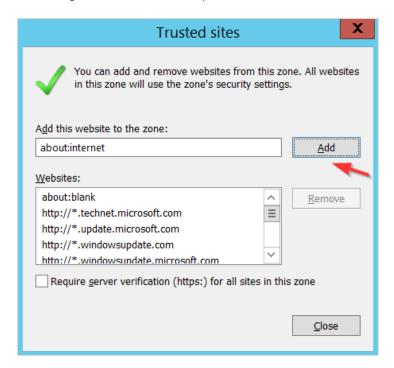


A message indicates that your browser is blocking you from reaching the internet.



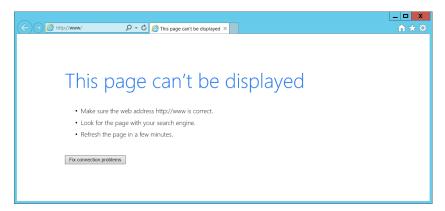
16. Click Add. The Trusted Sites dialog box opens.

17. Click **Add** again to add this website to your list of trusted sites.



18. Click Close.

The browser will attempt to establish a connection with the localhost.



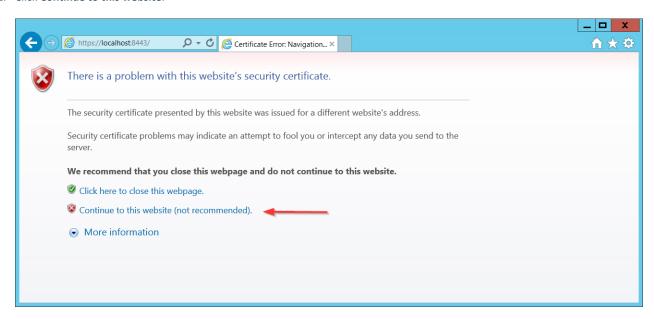
- 19. In the address bar, type http://localhost:8080 and press Enter.
- 20. Click **OK** to close the security alert.





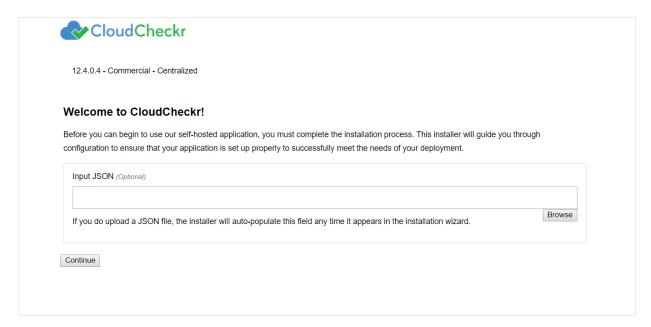
A warning about your security certificate displays.

21. Click Continue to this website.



22. Click **OK** to close the security alert.

The first screen of the Web installer opens. This screen is where you can upload a JSON file if you want the Web installer to auto-populate your configuration information any time it is required in the installation wizard.



Note: The Input JSON text field is an optional feature. If you do not want to use the website to configure the selfhosted application, you can load the file using the command line:

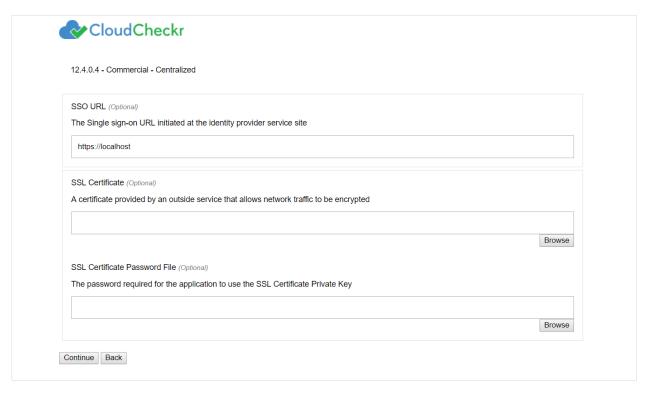
"C:\CloudCheckr\Package\Installer\CC.AmazonInstaller.exe - inputFile (path-to-input-file)"



- 23. If applicable, upload a JSON file by clicking **Browse** to navigate to the file location.
 - See the input JSON file section for more details.

24. Click Continue.

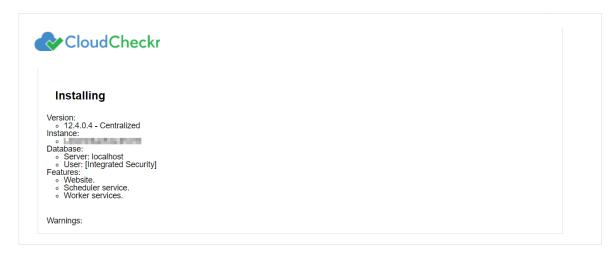
The next screen in the Web installer opens. This screen is where you configure your security features.



25. Click Continue.

The next screen in the Web installer opens. The first section in this screen:

- identifies the version number of the self-hosted application
- provides the EC2 Instance ID
- verifies that the Microsoft SQL® server is available to communicate with the application
- identifies that the website (Web Console) is being installed





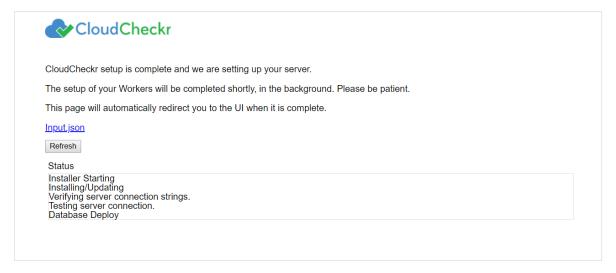
The second part of the screen identifies the default number of workers, which are Microsoft Windows® services that collect your AWS data via the API.



26. Leave the default worker count at 5 and click Install.

The next screen of the Web installer updates automatically as the following tasks are completed:

- Setup and testing of server settings
- Setup of database where user accounts and data get stored
- Installation of the console (Web and application UI)
- Configuration of the workers:



At this point, you can download the Input JSON file for later use.

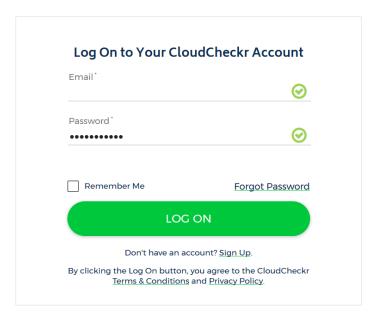
The file contains the exact configuration that you set up earlier in the installation process. Since the filename is not important as part of ingestion, feel free to rename the file. If you forget to click the Input.json link, and you want to use the file later, you can find it on the machine at:

C:\CloudCheckr\Input.JSON

Note: The installation process may take a few minutes because the application must install the Microsoft Windows® services as well as deploy and populate the databases with the appropriate data.



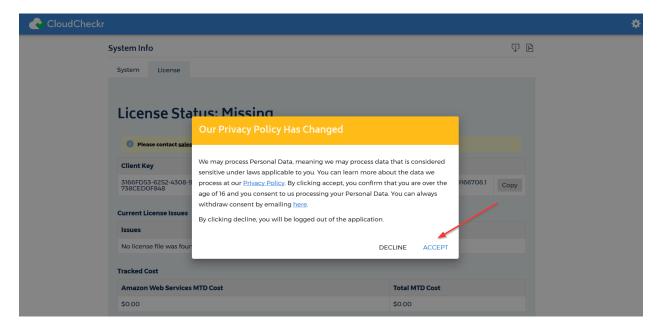
The log in screen of the application opens.



- 27. In the Email text field, type sysuser
- 28. In the Password text field, paste the EC2 instance ID of the Web console.
- 29. Click LOG ON.

When you install the AMI product for the first time, you will see our privacy notice in the foreground. The System Info page is displayed in the background.

30. Click Accept to acknowledge the changes to our privacy policy.





Configure the Self-Hosted App

License Your App

With the launch of the 12.4 release of the AMI and moving forward, all private offerings of the AMI product will require a license.

This section describes how to license your self-hosted application for a new installation. For more information on how to license an existing installation, contact your sales representative.

After you acknowledge the privacy policy changes, you will see is the System Info page with the License tab displayed by default. The message in the License tab will indicate that the license status is Missing:



You will not be able to finish the configuration of the self-hosted application until you contact sales for a new license file.

Note: To minimize the support team's workload and reduce the steps in the license process, we prefer that customers contact their assigned sales representative first. If you are not assigned to a sales representative or you cannot reach them, email sales directly at sales@cloudcheckr.com.

In the Client Key section, click **Copy** and paste the value into the Required Information table.

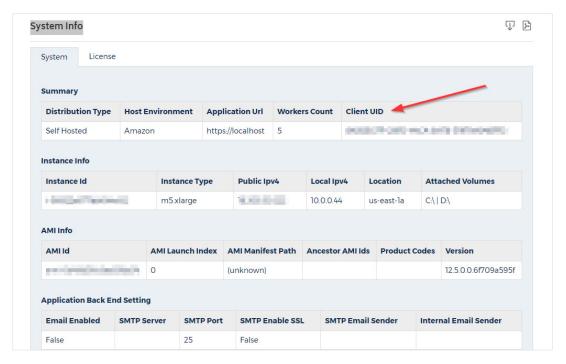


2. Email your sales representative to request a new license. Make sure to include the client key in your email.

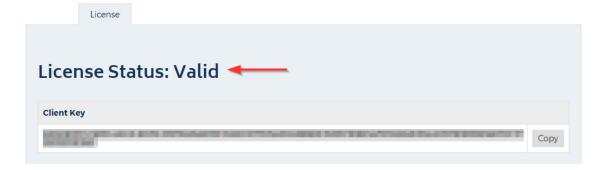


If your organization does not allow email for security reasons, you can provide the Client UID over the phone.

Locate the Client UID on the System tab. This is a unique ID or user ID that is associated with your self-hosted EC2 instance. Since it is a short string, it is easier to provide verbally than the client key, which is much longer.



- b. Call your sales representative and provide the Client UID string.
- 3. Once your sales representative provides you with a new license file, upload the license file:
 - Remote into your self-hosted application. a.
 - b. Make sure to save the license file to a location on this machine. If you save the file to your local desktop, you will not be able to access it during your remote desktop session.
 - c. Make sure you save the file with the LIC extension and not as a TXT file. The upload will fail if the file is not saved with the correct extension.
 - d. Navigate to the License tab on the System Info page.
 - e. In the Update License section, click Browse and navigate to the location where you saved the license file. Once the application loads the license file, the License Status changes to Valid.

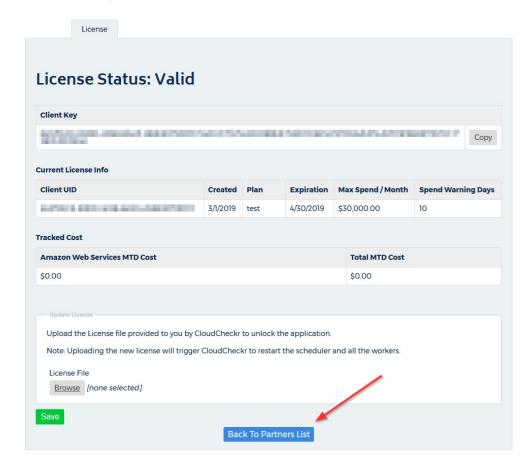




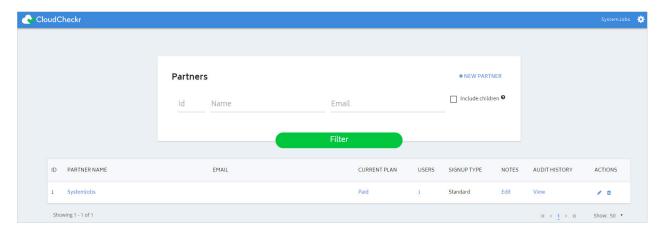
Create a Partner

Once your license is valid, you need to create a partner, which is the top-level container in the self-hosted application where you will store your accounts. For most self-hosted configurations, you will only need one partner—especially if you want to have all your accounts in one location.

1. On the License tab, click the **Back to Partners List** button.

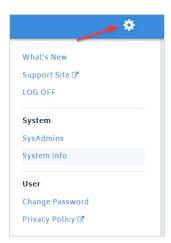


The Partners Landing page opens.

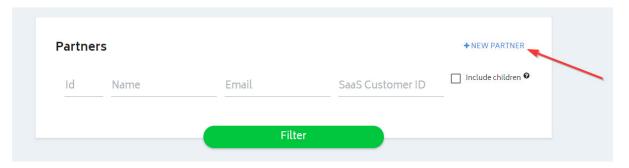




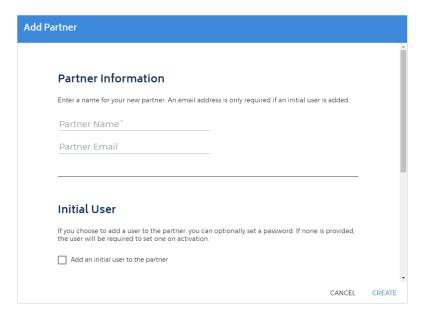
Only the Settings icon is in the header bar—indicating that you have not fully activated the self-hosted application. If you were to click the Settings icon, you could only perform basic tasks and view your system and license information.



Click + NEW PARTNER.



The Add Partner dialog box opens.

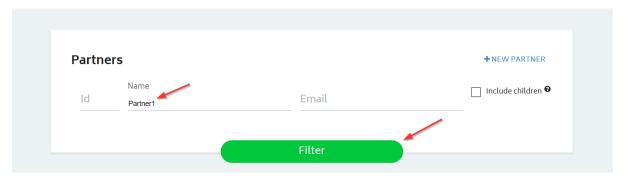




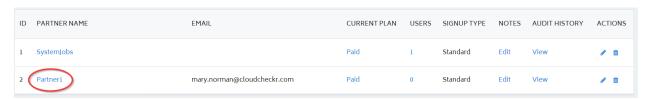
- 3. In the Partner Name text field, type a partner name.
- In the Partner Email text field, type an email address. 4.
- 5. Click Create.

A message indicates that the application added the partner successfully.

- 6. Click OK.
- Type the name of your new partner and click Filter. 7.



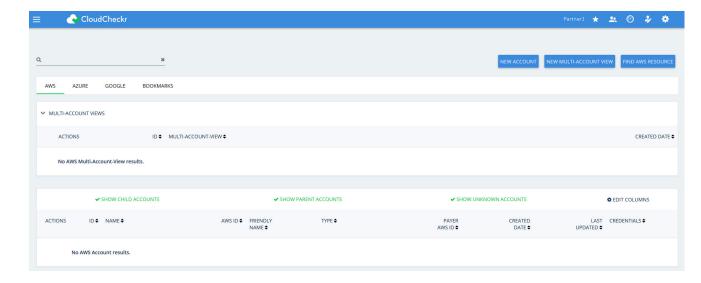
Your new partner is now included in the partner list.



Even though you have created your partner, you still only have basic functionality. If you drill into the partner, you will have access to more features.

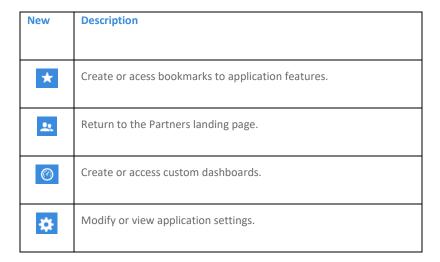
8. Click the partner name.

Now you are on the Accounts page.





Notice that more icons are now available in the header bar. Here's a quick overview:

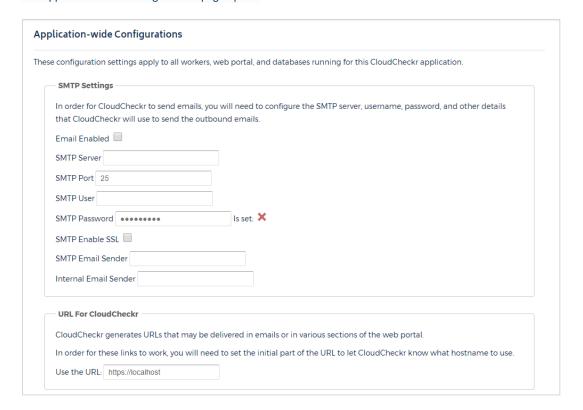


Before you can create your account(s) for this partner, you need to finish some back-end configuration steps.

Complete the Back-End System Configuration

In its default state, the self-hosted application does not have the same functionality as the SaaS version. Follow these instructions to complete the application configuration.

1. From the menu bar, click the **Settings** icon and choose **System > Configuration**. The Application-wide Configurations page opens.





- 2. Scroll down to the SMTP section and configure the settings that will allow the self-hosted application to send emails on new user activations, alerts, and report data.
- 3. Scroll down to the URL For CloudCheckr section and provide the URL that you want to display on any systemgenerated emails.

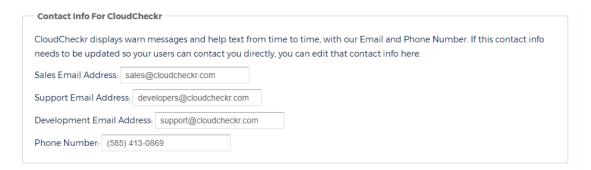
Note: The default localhost will display the DNS for the EC2 instance that is hosting your self-application. This URL is external-facing so you can use it to send emails.

4. Scroll down to the Workers section to see the default number of workers that the self-hosted application will install.

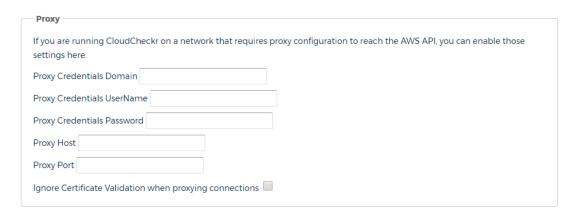
Note: The default number of workers in a self-hosted environment is 5. If you increase the number of AWS accounts in your self-hosted environment to 10-30, you can increase the number of workers to 25.



5. Scroll down to the Contact Info for CloudCheckr section and change the default email addresses and phone number if you want your users to contact you directly.

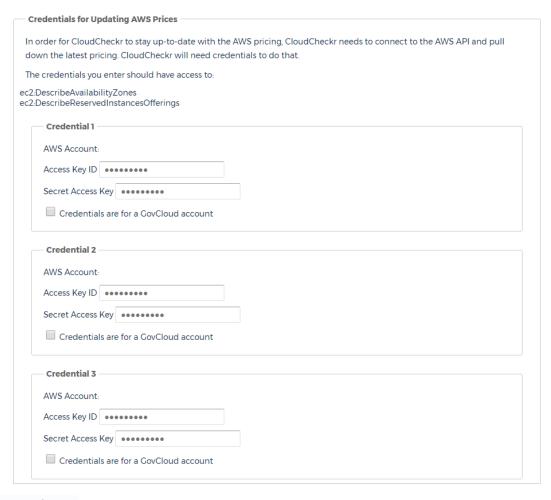


6. Scroll down to the Proxy section to enable your proxy configuration settings.





7. Scroll down to the Credentials for Updating AWS Prices section to paste the values of the access and secret keys you created in the Create IAM Users section.

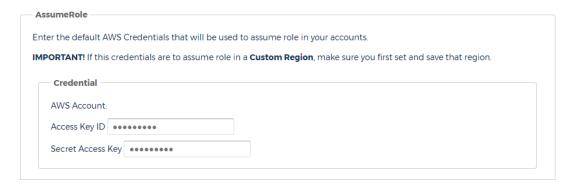


Create a Trusted User

1. Scroll down to the AssumeRole section on the Application-wide Configurations page.

When you assume a role, AWS gives you temporary security credentials to access other AWS accounts. The name of this role is referred to as a cross-account role.

Before you can create a cross-account role, you must plug in the access and secret keys of a Trusted User. A Trusted User is an IAM user whose credentials will enable the cross-account role to work with the self-hosted application.





2. To create a trusted user:

a. Copy the Trusted User policy:

```
"Version": "2012-10-17",
   "Statement":[
      {
         "Sid": "Stmt1474398174000",
         "Effect": "Allow",
         "Action":[
            "sts:AssumeRole"
         "Resource":[
            "arn:aws:iam::AWS ACCOUNT ID:user/root"
      }
   ]
}
```

- b. Replace AWS ACCOUNT ID with the 12-digit AWS account ID associated with your AWS account.
- c. Create and save the Trusted User policy using the instructions in the <u>Create an IAM Policy</u> section.
- d. Create a Trusted User group and attach the Trusted User policy using the instructions in the Create an IAM Group section.
- e. Create a trusted user and attach it to the Trusted User group using the instructions in the Create an IAM User
- f. Paste the values of the access and secret keys of the Trusted User into the AssumeRole section.
- 3. Click **Save Settings** to save all the configuration changes you made to the self-hosted application.
- 4. Copy the name of the Trusted User Policy, Trusted User Group, and Trusted User to the Required Information section.



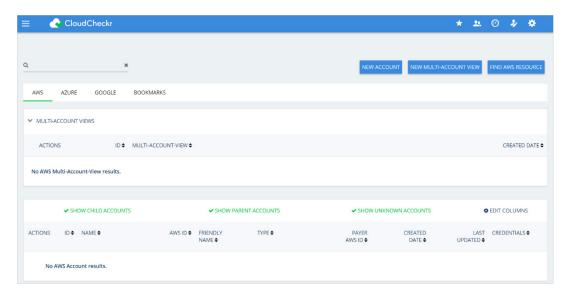
Create an Account

Now that you have configured all the back-end settings for the self-hosted application, you need to create an account or accounts within that partner. The account is where you will perform all your work in the self-hosted application—such as running reports, configuring alerts, and creating invoices.

1. From the Application-wide Configurations page, click **Back to Accounts**.

Note: You can also go to the Partners landing page and click your partner name.

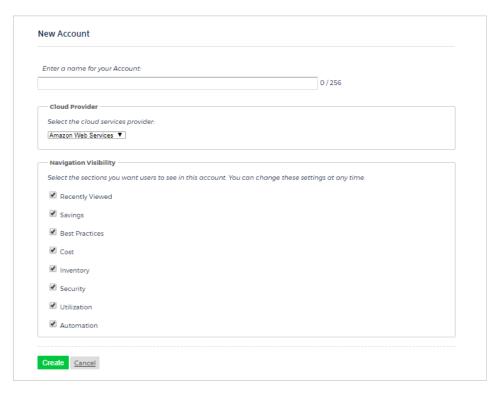
The Accounts page for your partner displays.



From the right side of the screen, click **NEW ACCOUNT**.



The New Account screen displays.

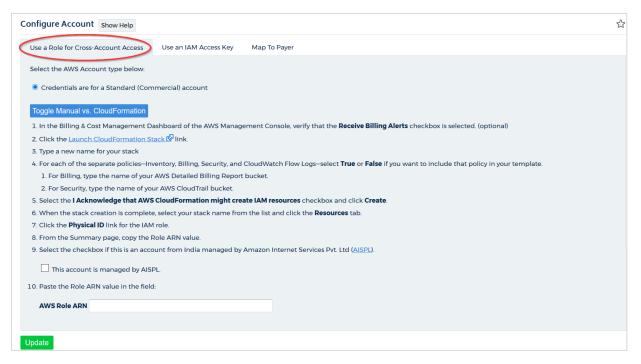


- 3. Type a unique name for your account and in the Cloud Provider section, select Amazon Web Services.
- Scroll down to the Navigation Visibility section, and select the modules that you want your account to have access to:
 - Recently Viewed: shows the 10 reports that were most recently accessed
 - Savings: shows you how to save the most amount of money in the shortest amount of time
 - Best Practices: contains more than 550 recommendations based off the industry compliance standards
 - Cost: includes all reports on your daily spend, Reserved Instances (RIs), access to raw billing data, and more
 - Inventory: contains list of Summary, Detail, and Trending reports on your cloud provider's offerings
 - Security: helps you audit, conduct forensics, and manage other security issues for your cloud deployment
 - Utilization: provides metrics, visualization, analysis, and right-sizing recommendations for your environment
 - Automation: provides functionality to automate administrative tasks related to security and maintenance
- At the bottom of the New Account page, click Create.



The Configure Account page opens.

By default, the Use a Role for Cross-Account Access tab is selected. This tab is visible because you provided the access key and secret key for the Trusted User in the <u>Create a Trusted User</u> procedure.



To finish your account configuration, you will return to AWS to create a cross-account role.



Create an IAM Role for Cross-Account Access

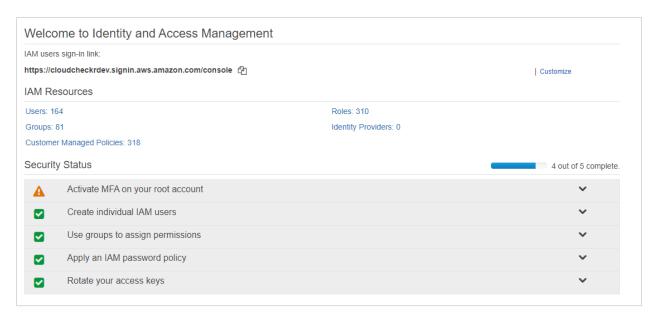
This procedure shows you how to create an IAM role in AWS and apply those credentials in the self-hosted application to complete the cross-account access configuration.

1. Log into the AWS Management Console.

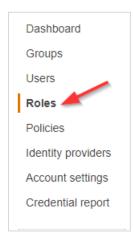
The AWS services page opens.

2. Scroll down to the Security, Identity & Compliance section and select IAM.

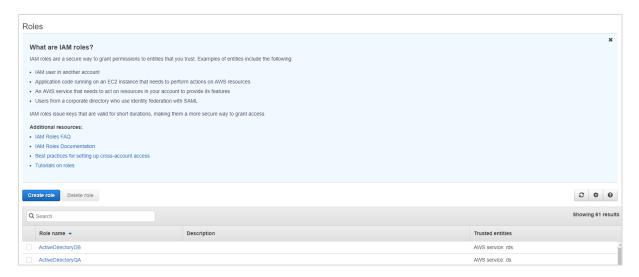
The Welcome to Identity and Access Management screen displays.



From the dashboard, click Roles.



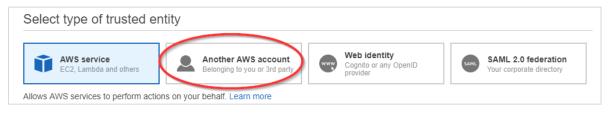
The Roles page opens.



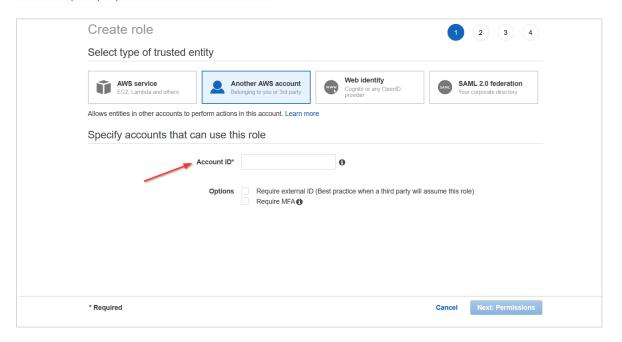
From the middle of the page, click Create role.

The Create role page opens.

5. In the Select type of trusted entity section, click **Another AWS account**.

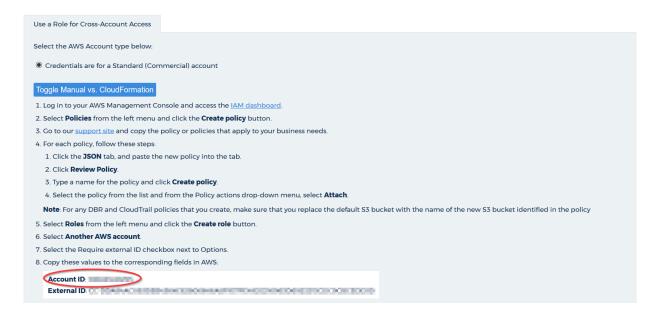


The screen prompts you to add an Account ID value.



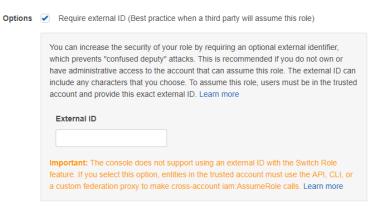


- 6. To obtain the Account ID value, perform the following steps in the self-hosted application:
 - a. Return to the Configure Accounts page.
 - Click Toggle Manual vs CloudFormation to view the instructions on how to create a cross-account role manually.
 - Copy the Account ID identified in the instructions.



- 7. Return to the AWS Management Console and perform the following steps:
 - a. Paste the Account ID.
 - b. In the Options section, select the Require external ID checkbox.

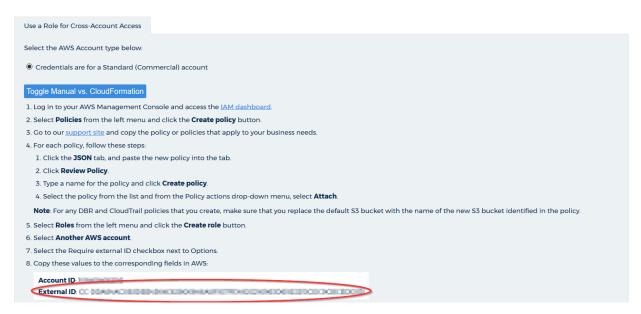
AWS displays more information about the purpose of the external ID.



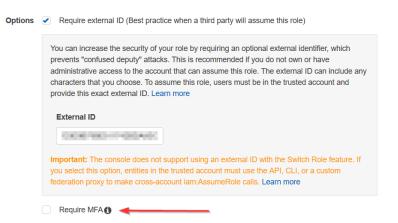
- 8. To obtain the External ID value, perform the following steps in self-hosted application:
 - a. Return to the Configure Accounts page.



b. Copy the external ID identified in the instructions.



- 9. Return to the AWS Management Console and perform the following steps:
 - a. Paste the external ID value that you just copied.
 - Verify that the Require MFA radio button is not selected.



10. Click Next: Permissions.

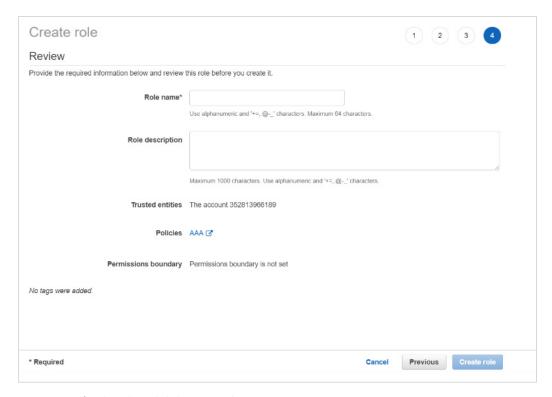
A list of policies displays.

11. Select the checkbox next to the policy or policies you want to attach to this role and click Next: Tags.

The Add tags page displays. Adding tags is optional. For the purposes of this procedure, we will not add tags.



12. Click Next: Review. The Review page opens.



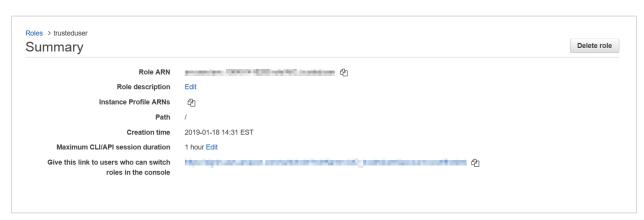
13. Type a name for the role and click Create role.

A message indicates that AWS has created your role.

The role is now listed with the other IAM roles associated with your AWS account.

14. Select the checkbox next to your new role and click the role name.

The Summary page for the selected role opens.



At the top of the page, you will see the Role ARN value.

ARN values use this format:

arn:aws:iam::YourAccountIDHere:role/CloudCheckrRole



15. Click the **Copy** icon next to the Role ARN value.



- 16. Return to Configure Accounts page in the self-hosted application and perform the following steps:
 - a. Paste the Role ARN value in the AWS Role ARN field.
 - b. Click **Update**.



You now have an AWS cross-account role associated with your self-hosted application account.

17. Copy the name of the cross-account role to the Required Information section.



Create Least Privilege Policies

The self-hosted application must have permission to ingest the AWS data needed to populate its reports.

To provide your self-hosted application with the permissions it needs, our team has designed least privilege policies. Each of these policies provides permission to a core area of AWS functionality:

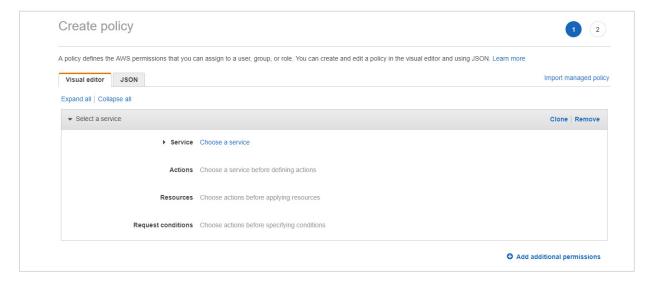
- Cost
- Billing
- Security/Compliance
- Inventory
- CloudWatch Flow Logs
- CloudTrail

In this procedure, you will create these least privilege policies in AWS:

- 1. From the AWS Services page, scroll down to the Security, Identity & Compliance section and select IAM. The Welcome to Identity and Access Management screen displays.
- 2. From the dashboard, click Policies.

A list of policies displays.

3. Click Create policy. The Create Policy page opens.



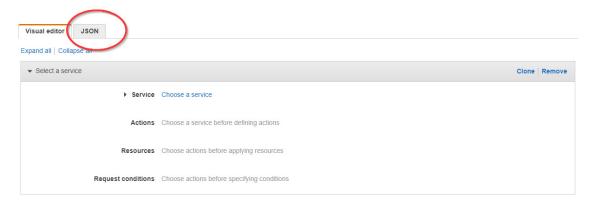
- 4. Follow the example in this step to see how to create a least privilege policy:
 - a. Copy the permissions for the Cost policy (see next page).



```
"Version": "2012-10-17",
   "Statement":[
         "Sid": "CloudCheckrCostPermissions",
         "Effect": "Allow",
         "Action":[
           "ec2:DescribeAccountAttributes",
           "ec2:DescribeAvailabilityZones",
           "ec2:DescribeReservedInstancesOfferings",
           "ec2:DescribeReservedInstances",
           "ec2:DescribeReservedInstancesListings",
           "ec2:DescribeHostReservationOfferings",
           "ec2:DescribeReservedInstancesModifications",
           "ec2:DescribeHostReservations",
           "ec2:DescribeInstances",
           "ec2:DescribeInstanceStatus",
           "ec2:DescribeRegions",
           "ec2:DescribeKeyPairs",
           "ec2:DescribePlacementGroups",
           "ec2:DescribeAddresses",
           "ec2:DescribeSpotInstanceRequests",
           "ec2:DescribeImages",
           "ec2:DescribeImageAttribute",
           "ec2:DescribeSnapshots",
           "ec2:DescribeVolumes",
           "ec2:DescribeTags",
           "ec2:DescribeNetworkInterfaces",
           "ec2:DescribeSecurityGroups",
           "ec2:DescribeInstanceAttribute",
           "ec2:DescribeVolumeStatus",
           "elasticache:DescribeReservedCacheNodes",
           "elasticache:DescribeReservedCacheNodesOfferings",
           "rds:DescribeReservedDBInstances",
           "rds:DescribeReservedDBInstancesOfferings",
           "rds:DescribeDBInstances",
           "redshift:DescribeReservedNodes",
           "redshift:DescribeReservedNodeOfferings",
           "s3:GetBucketACL",
           "s3:GetBucketLocation",
           "s3:GetBucketLogging",
           "s3:GetBucketPolicy",
           "s3:GetBucketTagging",
           "s3:GetBucketWebsite",
           "s3:GetBucketNotification",
           "s3:GetLifecycleConfiguration",
           "s3:GetNotificationConfiguration",
           "s3:List*",
           "dynamodb:DescribeReservedCapacity",
           "dynamodb:DescribeReservedCapacityOfferings",
           "iam:GetAccountAuthorizationDetails",
           "iam:ListRolePolicies",
           "iam:ListAttachedRolePolicies"
         "Resource": "*"
  ]
}
```



- b. Return to the Create Policy page in the AWS Management Console.
- Click the JSON tab.



The JSON tab opens, allowing you to create a policy using JSON syntax.

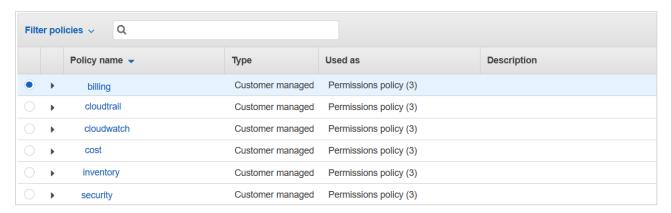
- Replace the text in the JSON tab with the policy you just copied.
- e. Click **Review policy**. The Review policy page opens.
- f. Type a name for the policy and click **Create policy**.
- 5. Repeat step 4 for each least privilege policy. You can copy these policies from Appendix: IAM Policies.
- 6. Copy the least privilege policy names to the Required Information section.

Attach Least Privilege Policies to Cross-Account Role

Now that you have created the least privilege policies, you must attach them to your cross-account role so that your self-hosted application can ingest the data from your AWS account.

- 1. From the AWS Services page, scroll down to the Security, Identity & Compliance section and select IAM. The Welcome to Identity and Access Management screen displays.
- 2. From the dashboard, select Policies.

Select the radio button next to one of the least privilege policies. In this example, we chose billing.



3. From the Policy actions menu, select Attach.

The Attach Policy page opens.

- 4. Filter by your cross-account role name to refine your search, select the radio button next to your role, and click Attach policy.
- 5. Repeat steps 2-4 for the Cost, Inventory, Security/Compliance, CloudWatch Flow Logs, and CloudTrail policies.

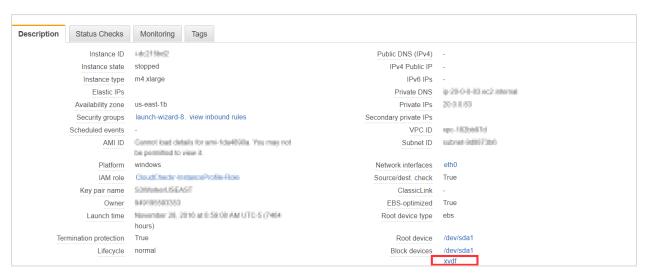


Upgrade the Self-Hosted App

In this procedure, you will learn how to upgrade your self-hosted application.

Your first step is to create a snapshot or backup of your existing EBS volume in AWS and create a volume based on that snapshot. Since your EBS volume is essentially your D: drive, you will want to keep that data in case you need to restore or keep your original EC2 running.

- 1. From the EC2 list in AWS, select your EC2 instance.
- Scroll down to the tabbed section. The Description tab of the selected instance is displayed by default.
- Locate the link to the **xvdf volume** in the Block devices field.



Click xvdf.

Information for the block device displays.

In the EBS ID field, click the link to the volume.

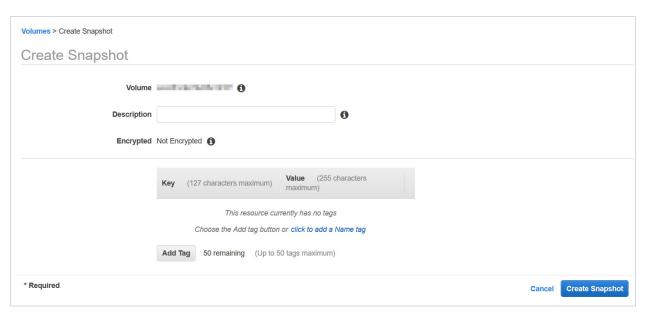


The details of the selected volume are now displayed on the page.

Right-click the row of the selected volume and from the fly-out menu, select Create Snapshot.



The Create Snapshot page opens.

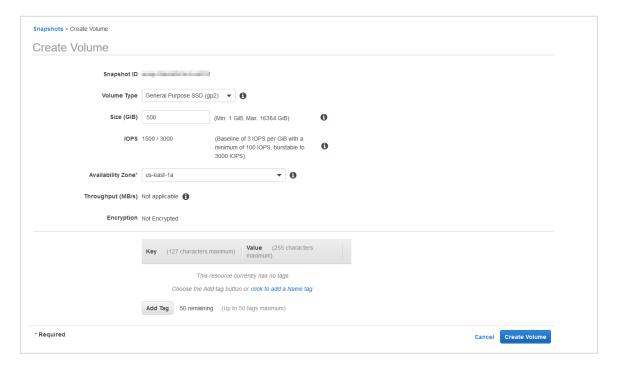


- 7. Click Create Snapshot.
- Click the snapshot link.



Right-click the row of the selected snapshot and from the fly-out menu, select Create Volume.

The Create Volume page opens.



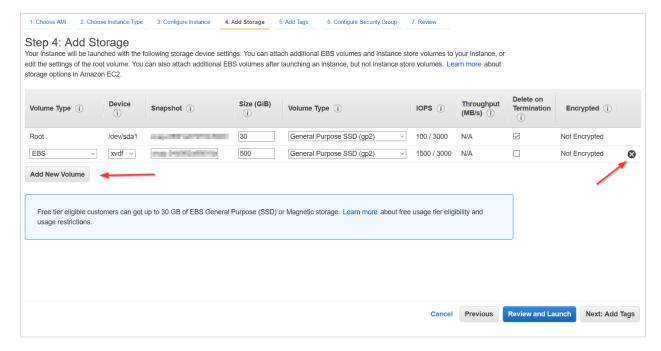


- 10. Click Create volume.
- 11. From the EC2 dashboard, select Images > AMI.
- 12. Select the check box next to the new AMI and click Launch.
- 13. Complete Step 2: Choose an Instance Type and Step 3: Configure Instance Details using the previous instructions.
- 14. In Step 3: Storage, click

 to delete the original volume and click Add New Volume.

 14. In Step 3: Storage, click

 to delete the original volume and click Add New Volume.



A new row opens where you can add the copy of your original volume.

- 15. From the Device drop-down menu, select xvdf and copy the snapshot ID to replicate your original volume.
- 16. Complete the configuration of your new EC2 instance.
- 17. Remote into your new EC2 instance and complete the installation process.
- 18. Request a new license from your sales representative and follow the License the App section to upload the new license file.



Required Information

Attribute	Value
AWS Account #1	name/availability zone
AWS Account #2	name/availability zone
AWS Account #3	name/availability zone
Pricing Policy Name	
Pricing User Group Name	
Pricing User #1 (credentials for pricing jobs)	IAM user name/access key/secret key
Pricing User #2 (credentials for pricing jobs)	IAM user name/access key/secret key
Pricing User #3 (credentials for pricing jobs)	IAM user name/access key/secret key
EC2 Instance ID	
EC2 Instance Type	
EC2 Availability Zone (Region Code)	
Private Key (.PEM) File Location and Name	
Public DNS Name (IPv4)	
Private DNS	
Subnet ID	
Trusted User Policy Name	
Trusted User Group Name	



Attribute	Value
Trusted User Name	
Cross-Account Role Name	
Least Privileges Policy: Cost	
Least Privileges Policy: Billing	
Least Privileges Policy: Security/Compliance	
Least Privileges Policy: Inventory	
Least Privileges Policy: CloudWatch Logs	
Least Privileges Policy: CloudTrail	
Partner Name	
Account Name(s)	



Frequently Asked Questions

Is There an Alternative to Remote Desktop?

If you want to connect to your EC2 instance on your local machine, you can use the external public hostname to connect to the EC2 instance to install the application.

The external public hostname resolves to the public IP address or the Elastic IP address, which allows your instance to communicate to the internet.



- Open a Web browser. This procedure uses Mozilla Firefox as an example.
- 2. Click + to open a new tab.
- 3. In the address bar, type http://
- Paste the public **DNS (IPv4)** into the address bar.
- 5. Add :8080/ to the end of the host name to allow the Web installer to run on port 8080 in HTTP. You opened this port as part of your security group configuration.

The format of the complete address will look like this:

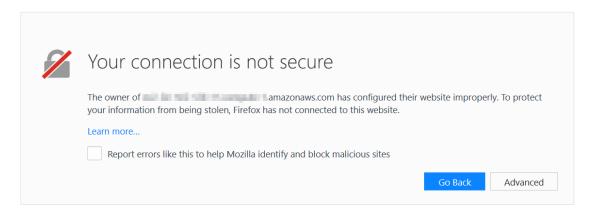


Click Enter.

The first screen of the Web installer opens.

7. Complete the installation steps for the Web Console in the Install the Self-Hosted App section.

When the configuration is complete, a warning message indicates that your connection is not secure.



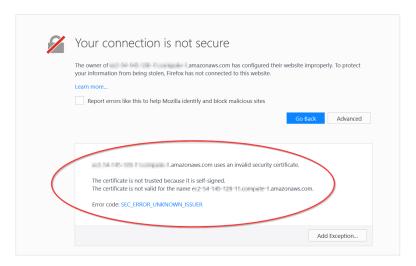
Note: The content and look-and-feel of the warning message depends on the browser in use. In this example, we used Mozilla Firefox.

The application requires a secure connection with a certificate owned by the domain. Since you are launching the application in a self-hosted environment, it cannot automatically create a certificate.



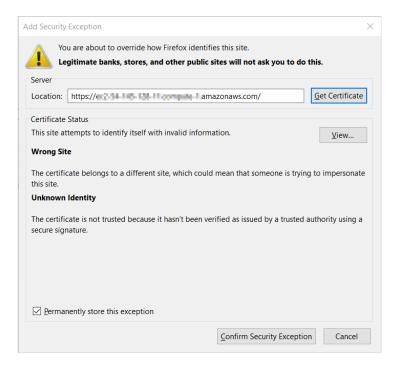
Click Advanced to get more information about the warning.

A message indicates that the certificate is not trusted or valid.



9. Click **Add Exception...** to add the EC2 instance as a security exception.

The Add Security Exception dialog box opens.



10. Verify that Permanently store this exception is selected and click Confirm Security Exception.

The log in screen of the application opens.

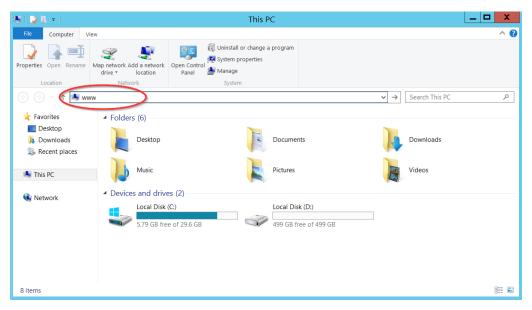
Why Can't I Open My Browser?

Your remote desktop session runs in a Microsoft Windows® 2012 R2 server environment, which is not compatible with newer applications like Internet Explorer. As a result, since you are logging in as an administrator, you will get an error message when you select **Start > Internet Explorer**:



Here is the workaround to open a browser session:

- From the taskbar, click the Folder icon.
- Type www in the search bar to open your browser.



Follow steps 11-17 in the Install the Self-Hosted App section to complete your connection to your EC2 instance.



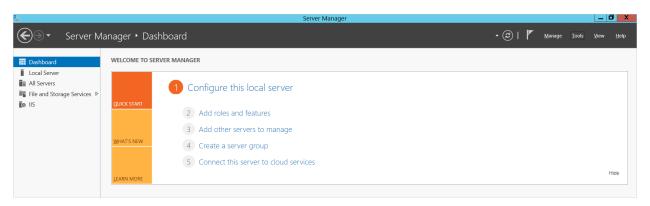
Where Is My D: Drive?

If your D: drive seems to be missing, follow these steps to make sure it is online:

1. From the taskbar, click the **Server Manager** icon.

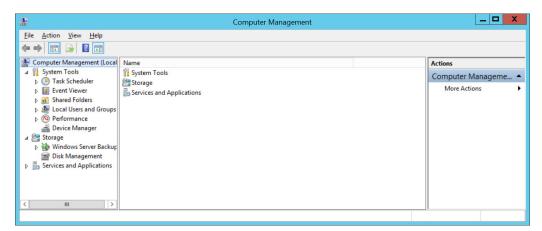


The Server Manager Dashboard opens.



From the menu bar, choose Tools > Computer Management.

The Computer Management screen displays.

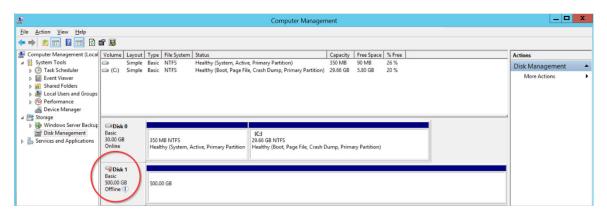




3. From the dashboard, select **Storage > Disk Management**.



Information about your disks displays. Notice that Disk 1 has a red arrow and is labeled Offline.

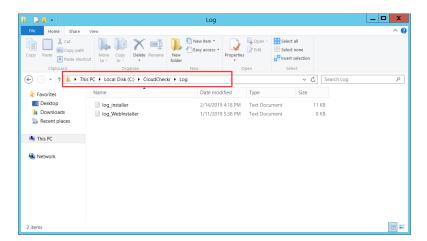


Right-click the disk name and from the fly-out menu, select Online. Your D: drive is now available.

How Do I Access My Log Files?

Our team can help you diagnose and solve the problem by reviewing your log files, which record every action performed within the web installer and the application. Follow these steps to access your log files:

- From the taskbar, click Windows Explorer.
- Navigate to PC: Local C > CloudCheckr > Logs.





3. Click one of the log files.

In this example, we opened the log file for the application installer.



- Scroll down the bottom of the list to see the most recent events.
- Provide the log file or a screenshot of that log file to Support so they can troubleshoot your issue.



Appendix

IAM Policies

If you are going to <u>create a cross-account role</u> manually, you can copy any of these least privilege policy categories and attach them to that role.



Billing:

```
"Version":"2012-10-17",
  "Statement":[
     {
        "Sid":"CostReadDBR",
        "Effect":"Allow",
        "Action":[
           "s3:GetBucketACL",
           "s3:GetBucketLocation",
           "s3:GetBucketLogging",
           "s3:GetBucketPolicy",
           "s3:GetBucketTagging",
           "s3:GetBucketWebsite",
           "s3:GetBucketNotification",
           "s3:GetLifecycleConfiguration",
           "s3:GetNotificationConfiguration",
           "s3:GetObject"
         "Resource":[
           "arn:aws:s3:::[YOUR DETAILED BILLING REPORT BUCKET]",
           "arn:aws:s3:::[YOUR DETAILED BILLING REPORT BUCKET]/*",
           "arn:aws:s3:::[YOUR COST AND USAGE REPORT BUCKET] (optional)",
           "arn:aws:s3:::[YOUR COST AND USAGE REPORT BUCKET]/* (optional)"
        ]
     }
  ]
}
```



Security/Compliance:

```
"Version": "2012-10-17",
"Statement":[
      "Sid": "SecurityPermissons",
      "Effect": "Allow",
      "Action":[
         "acm:DescribeCertificate",
         "acm:ListCertificates",
         "acm:GetCertificate",
         "cloudtrail:DescribeTrails",
         "cloudtrail:GetTrailStatus",
         "logs:GetLogEvents",
         "logs:DescribeLogGroups",
         "logs:DescribeLogStreams",
         "config:DescribeConfigRules",
         "config:GetComplianceDetailsByConfigRule",
         "config:DescribeDeliveryChannels",
         "config:DescribeDeliveryChannelStatus",
         "config:DescribeConfigurationRecorders",
         "config:DescribeConfigurationRecorderStatus",
         "ec2:Describe*",
         "iam:Get*",
         "iam:List*",
         "iam:GenerateCredentialReport",
         "kms:DescribeKey",
         "kms:GetKeyPolicy",
         "kms:GetKeyRotationStatus",
         "kms:ListAliases",
         "kms:ListGrants",
         "kms:ListKeys",
         "kms:ListKeyPolicies",
         "kms:ListResourceTags",
         "rds:Describe*",
         "ses:ListIdentities",
         "ses:GetSendStatistics",
         "ses:GetIdentityDkimAttributes",
         "ses:GetIdentityVerificationAttributes",
         "ses:GetSendQuota",
         "sns:GetSnsTopic",
         "sns:GetTopicAttributes",
         "sns:GetSubscriptionAttributes",
         "sns:ListTopics",
         "sns:ListSubscriptionsByTopic",
         "sqs:ListQueues",
         "sqs:GetQueueAttributes"
      ],
      "Resource": "*"
   }
]
```



Inventory:

```
"Version": "2012-10-17",
"Statement":[
      "Sid": "SecurityPermissons",
      "Effect": "Allow",
      "Action":[
         "acm:DescribeCertificate",
         "acm:ListCertificates",
         "acm:GetCertificate",
         "cloudtrail:DescribeTrails",
         "cloudtrail:GetTrailStatus",
         "logs:GetLogEvents",
         "logs:DescribeLogGroups",
         "logs:DescribeLogStreams",
         "config:DescribeConfigRules",
         "config:GetComplianceDetailsByConfigRule",
         "config:DescribeDeliveryChannels",
         "config:DescribeDeliveryChannelStatus",
         "config:DescribeConfigurationRecorders",
         "config:DescribeConfigurationRecorderStatus",
         "ec2:Describe*",
         "iam:Get*",
         "iam:List*",
         "iam:GenerateCredentialReport",
         "kms:DescribeKey",
         "kms:GetKeyPolicy",
         "kms:GetKeyRotationStatus",
         "kms:ListAliases",
         "kms:ListGrants",
         "kms:ListKeys",
         "kms:ListKeyPolicies",
         "kms:ListResourceTags",
         "rds:Describe*",
         "ses:ListIdentities",
         "ses:GetSendStatistics",
         "ses:GetIdentityDkimAttributes",
         "ses:GetIdentityVerificationAttributes",
         "ses:GetSendQuota",
         "sns:GetSnsTopic",
         "sns:GetTopicAttributes",
         "sns:GetSubscriptionAttributes",
         "sns:ListTopics",
         "sns:ListSubscriptionsByTopic",
         "sqs:ListQueues",
         "sqs:GetQueueAttributes"
      ],
      "Resource": "*"
]
```



CloudWatch Flow Logs:

```
"Version":"2012-10-17",
   "Statement":[
     {
         "Sid": "CloudWatchLogsSpecific",
         "Effect": "Allow",
         "Action":[
           "logs:GetLogEvents",
            "logs:DescribeLogGroups",
            "logs:DescribeLogStreams"
         ],
         "Resource":[
           "arn:aws:logs:*:*:*"
        ]
     }
  ]
}
```

CloudTrail:

```
"Version": "2012-10-17",
"Statement":[
   {
      "Sid": "CloudTrailPermissions",
      "Effect": "Allow",
      "Action":[
         "s3:GetBucketACL",
         "s3:GetBucketLocation",
         "s3:GetBucketLogging",
         "s3:GetBucketPolicy",
         "s3:GetBucketTagging",
         "s3:GetBucketWebsite",
         "s3:GetBucketNotification",
         "s3:GetLifecycleConfiguration",
         "s3:GetNotificationConfiguration",
         "s3:GetObject",
         "s3:List*"
      ],
      "Resource":[
         "arn:aws:s3:::[YOUR CLOUDTRAIL BUCKET]",
         "arn:aws:s3:::[YOUR CLOUDTRAIL BUCKET]/*"
      ]
   }
]
```

Learn more about the CloudCheckr Cloud Management Platform at www.cloudcheckr.com.

