



DefendX Software Control-QFS® for Windows® Installation Guide Version 8.6

This guide details the method for installing DefendX Software Control-QFS® for Windows® from an administrator's perspective. Upon completion of the steps within this document, DefendX Software Control-QFS for Windows will be installed within your enterprise community. This installation guide applies to all editions of Windows.



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Executive Summary

This document is a guide to the installation and setup of DefendX Software Control-QFS® for Windows® from an administrator's perspective. This guide describes a typical installation, including initial installation of DefendX Software Control-QFS for Windows on one server.

It will take you about 30 minutes to complete the steps outlined here. Upon completion of these steps, DefendX Software Control-QFS for Windows will be installed within your enterprise community.

This installation guide applies to all Windows editions.

Requirements

This section highlights the main hardware and software requirements needed for a successful installation of DefendX Software Control-QFS for Windows.

Hardware Specification

Your hardware should be appropriate for the services running on the machine. If the system is used only for file and print services, DefendX Software recommends the following:

- 1 GHz CPU
- 1 GB RAM
- 150 MB free disk space
- Network interface card

Software Specification

- Windows Server® 2008 64-bit or later

DefendX Software Control-QFS for Windows setup is integrated with Windows security, so you are not required to create the service account prior to installation. However, Windows requires that your primary domain controller (PDC) be online and available to create accounts. If you do not have access to your PDC, you must create all groups and accounts in advance.

Installation

Prior to installing DefendX Software Control-QFS for Windows, DefendX Software recommends verifying that the installation server meets the requirements listed in the *Requirements* section of this document.

Installing DefendX Software Smart Policy Manager™

If no other products on your system are enabled with DefendX Software Smart Policy Manager™, the first part of the Control-QFS installation process involves installing Smart Policy Manager. DefendX Software Smart Policy Manager provides the policy engine that drives DefendX Software Control-QFS for Windows and other File Data Management (FDM) and systems management products.

If DefendX Software Smart Policy Manager is already installed on your computer, the setup process will automatically skip this step; proceed to the section of this document titled *Installing DefendX Software Control-QFS for Windows*. If not, DefendX Software Smart Policy Manager installation takes only a few minutes.

Once this process is complete, DefendX Software Control-QFS for Windows installation begins automatically. A few minutes later, your system will be up and running; no reboot is required.

To install Smart Policy Manager, perform the following steps:

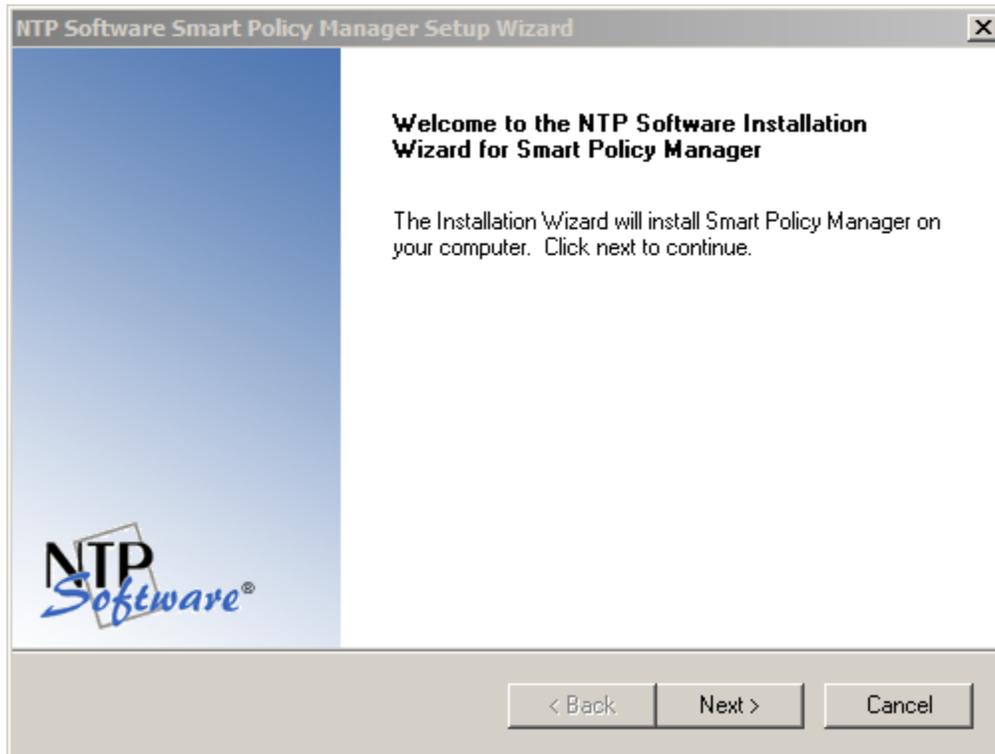
1. Log on to your server by using an account with administrator privileges.
2. Run the DefendX Software Control-QFS installer. If DefendX Software Smart Policy Manager™ is not installed, the following installer will launch automatically.

If DefendX Software Smart Policy Manager is installed, you can skip to the section on *Installing DefendX Software Control-QFS for Windows*.

3. When prompted to install DefendX Software Smart Policy Manager, click the **Yes** button.



4. The DefendX Software Smart Policy Manager Installation Wizard opens. Click **Next** to begin the installation.



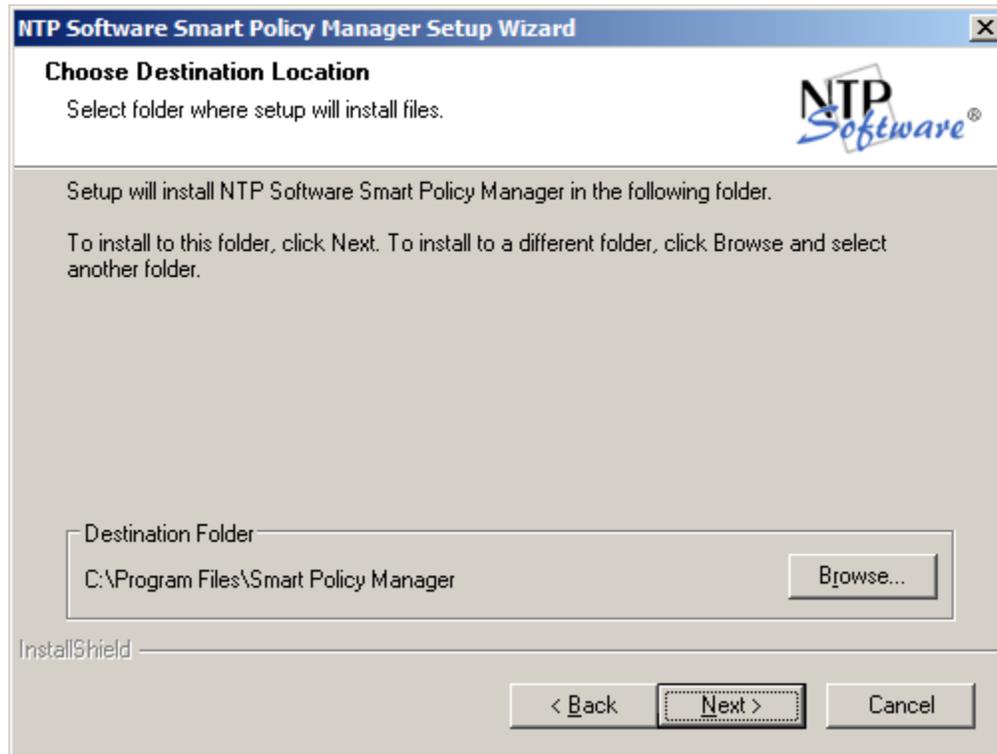
NOTES:

- The DefendX Software Smart Policy Manager engine distributes policies across the computers on your network. It allows you to create a policy hierarchy that matches the way you actually manage your network.
- DefendX Software Smart Policy Manager supports secure delegated administration and provides a common user interface for DefendX Software Smart Policy Manager-enabled applications.

5. In the **License Agreement** dialog box, read the end-user license agreement. If you agree to the terms, click **I accept the terms of the license agreement** and then click **Next**. If you do not accept the terms, click **Cancel** to exit the installation.



6. In the **Choose Destination Location** dialog box, click **Browse** to choose the location where you want to install DefendX Software Smart Policy Manager, and then click **Next**.



7. In the **Select Features** dialog box, select the components you want to install, and then click **Next**.



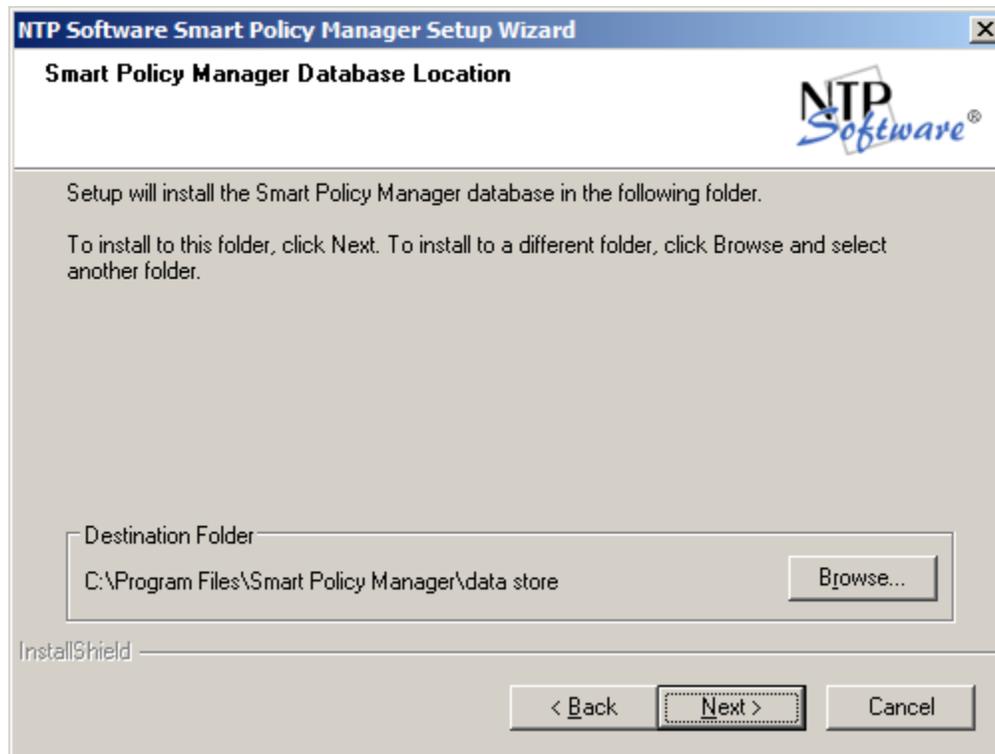
NOTE: After DefendX Software Control-QFS is set up on your network, you can install DefendX Software Smart Policy Manager and the Control-QFS Admin application on your workstation to administer the systems in your environment remotely.

8. In the **Service Account** dialog box, when prompted for a Windows domain user account to run the DefendX Software Smart Policy Manager service, enter the username and password for a domain user account with administrative rights on the local machine. Click **Next**.

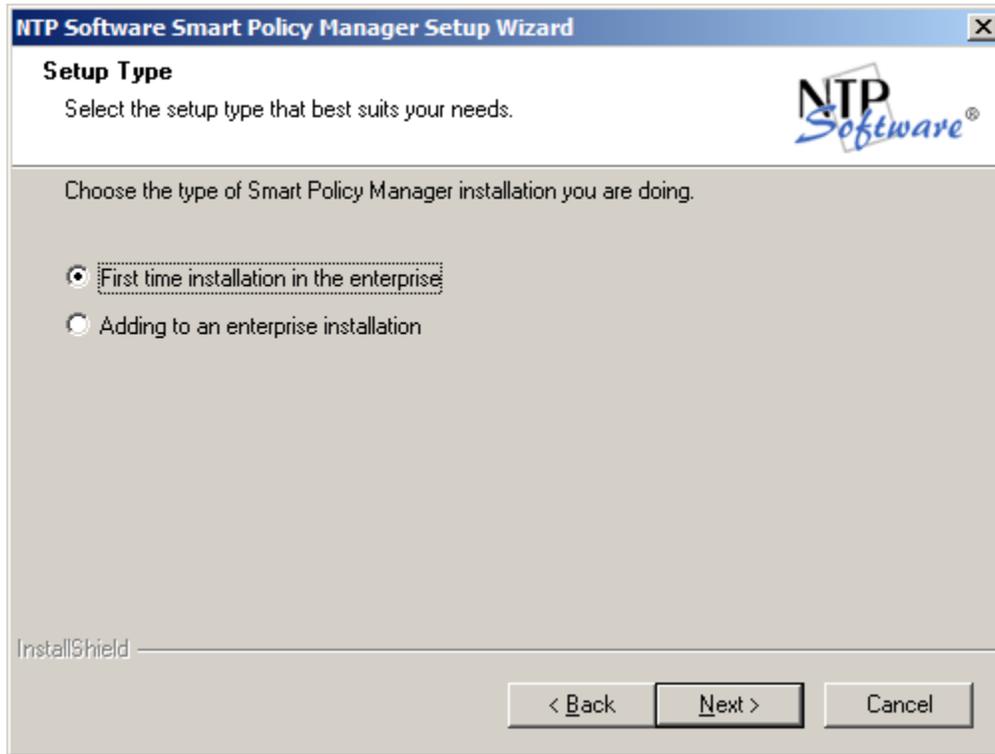
The screenshot shows a Windows dialog box titled "NTP Software Smart Policy Manager Setup Wizard". The dialog has a blue header bar with the title and a close button. Below the header, the text "Service Account:" is displayed. To the right of this text is the NTP Software logo. Below the logo, the instruction "Enter the service account the Smart Policy Manager service is to run under." is shown. There are three input fields: "Service" with the text "Administrator", "Password:" with ten black dots, and "Confirm:" with ten black dots. At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

NOTE: If you specify a service account other than the ID under which you are currently logged on, you may receive a prompt asking whether you want to grant rights to that account. You must answer **Yes** for the setup to configure your chosen account correctly.

9. In the **Smart Policy Manager Database Location** dialog box, enter the directory name where you want to install the DefendX Software Smart Policy Manager database, or just accept the default location. Click **Next**.



10. In the **Setup Type** dialog box, select the DefendX Software Smart Policy Manager installation type for your environment. If installing to a new environment with no prior DefendX Software Smart Policy Manager installations, click **Next**. If installing in an environment where DefendX Software Smart Policy Manager is already running, choose **Adding to an enterprise installation** and click **Next**.



NOTES:

- DefendX Software Smart Policy Manager is the glue that holds your systems together and applies policies across machines. A first-time installation creates a new DefendX Software Smart Policy Manager management hierarchy.
- After installation on the first machine, additional machines join an existing hierarchy, and the newly joined systems will automatically inherit their configuration.

11. In the **Smart Policy Manager Initial Setup Parameters** dialog box, provide DefendX Software Smart Policy Manager with a name for your organization and a location name for this DefendX Software Smart Policy Manager instance, or accept the default settings. Click **Next**.

NTP Software Smart Policy Manager Setup Wizard

Smart Policy Manager Initial Setup Parameters

Enter the initial organization and location names.

Organization: My Organization

Location: My Site

InstallShield

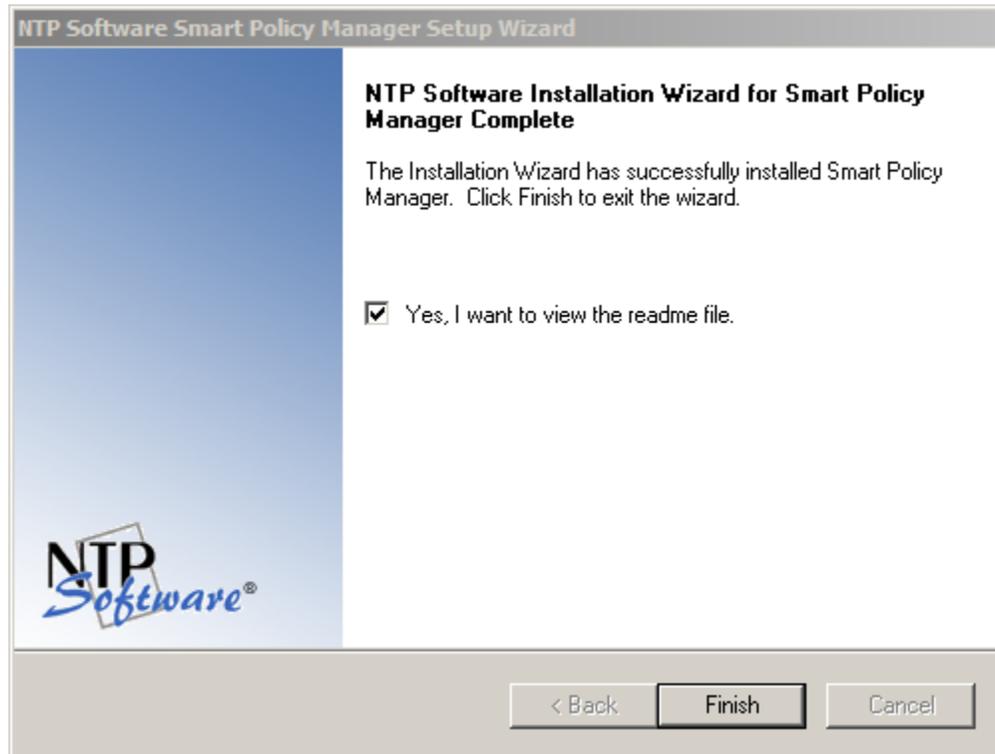
< Back Next > Cancel

12. In the **Start Copying Files** dialog box, review your configuration information. Click **Back** to make any changes; otherwise, click **Next** to begin copying the files.



NOTE: As files are copied, the DefendX Software Smart Policy Manager Setup Status dialog box appears, showing you the percentage complete for the DefendX Software Smart Policy Manager installation process. This process can take several minutes.

13. If you want to view the DefendX Software Smart Policy Manager readme file, check the **Yes, I want to view the readme file** checkbox, and then click **Finish**.



Important: As you have completed the installation of DefendX Software Smart Policy Manager, the Setup Wizard automatically begins installing DefendX Software Control-QFS for Windows. The next section leads you through this process.

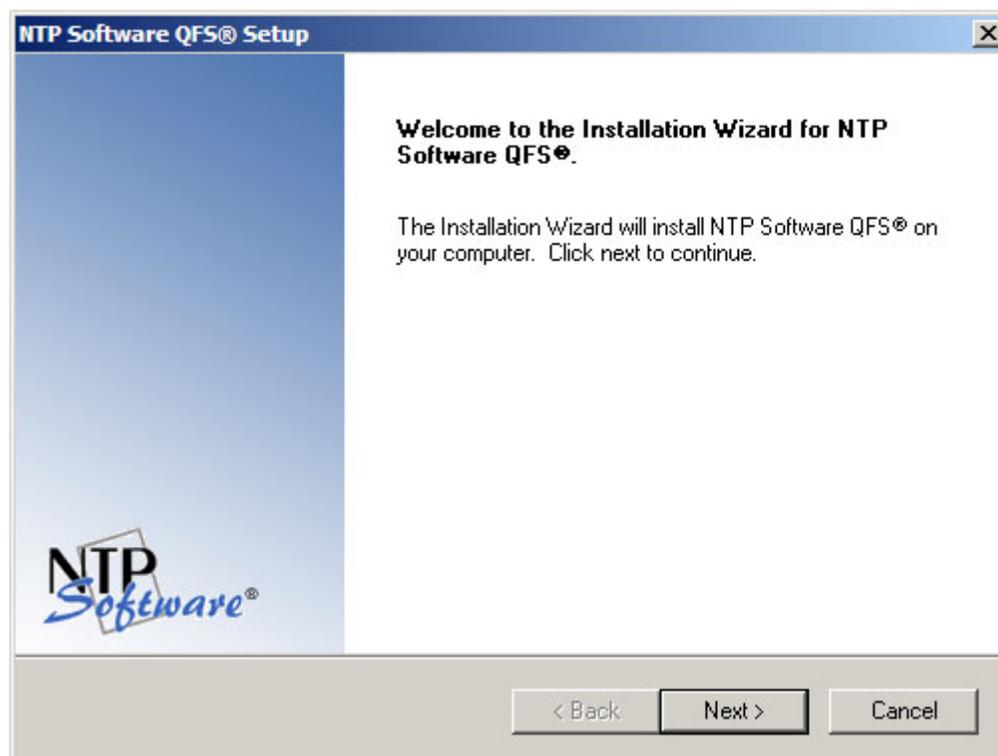
Installing DefendX Software Control-QFS for Windows

To install DefendX Software Control-QFS for Windows, you need an ID with administrator rights. DefendX Software Control-QFS for Windows needs a similar account under which to run as a service. You can use the account from which you are installing, or you can use a different account.

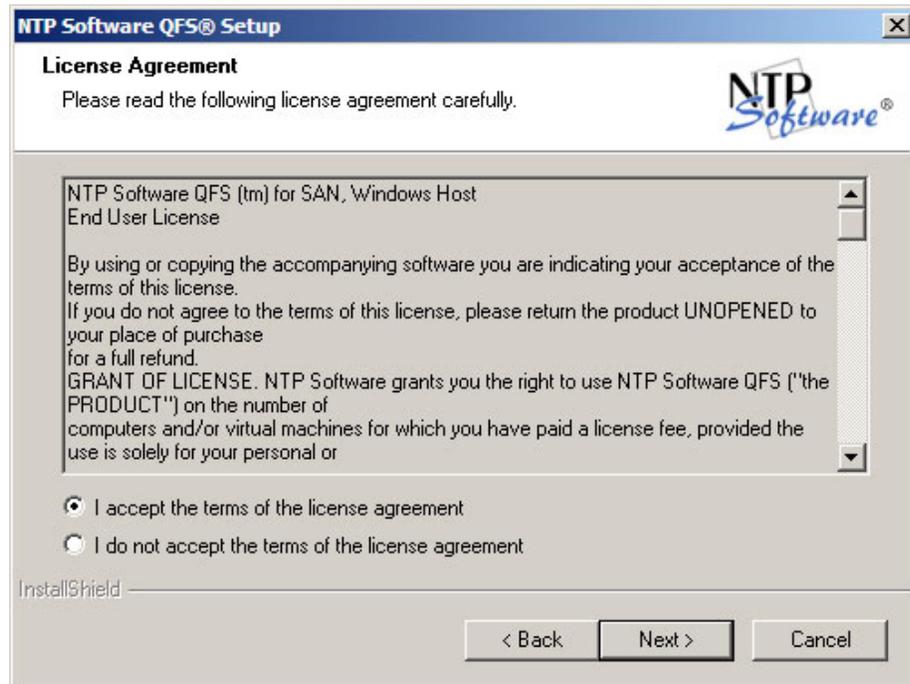
DefendX Software Control-QFS for Windows does not require a server reboot after installation. Our advanced File System Filter technology can install from a central console throughout your enterprise without requiring a reboot of any of your servers or workstations.

To install DefendX Software Control-QFS for Windows, perform the following steps:

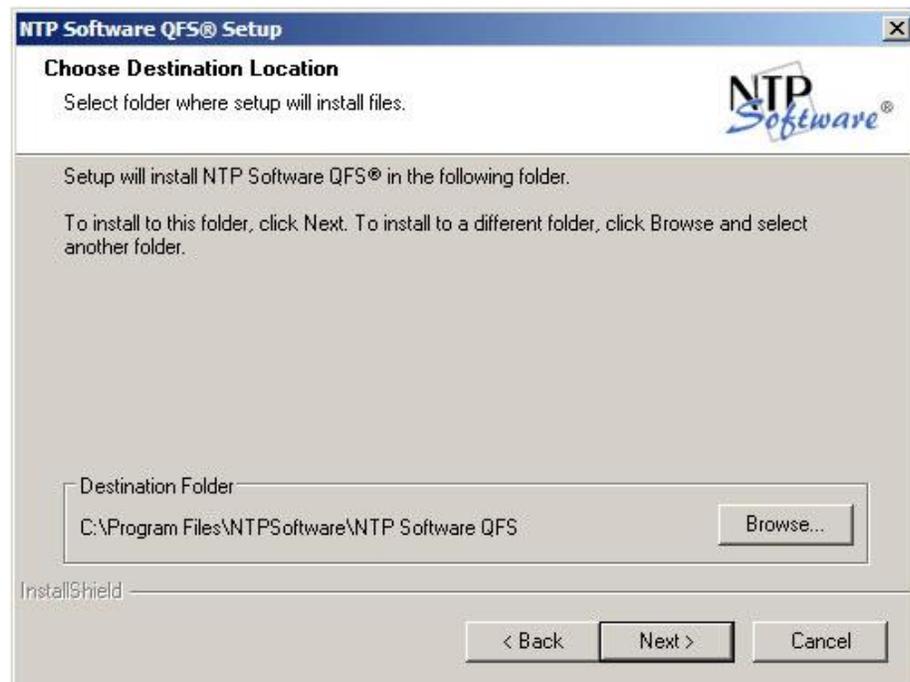
1. In the **DefendX Software Control-QFS Setup** welcome dialog box, click **Next**.



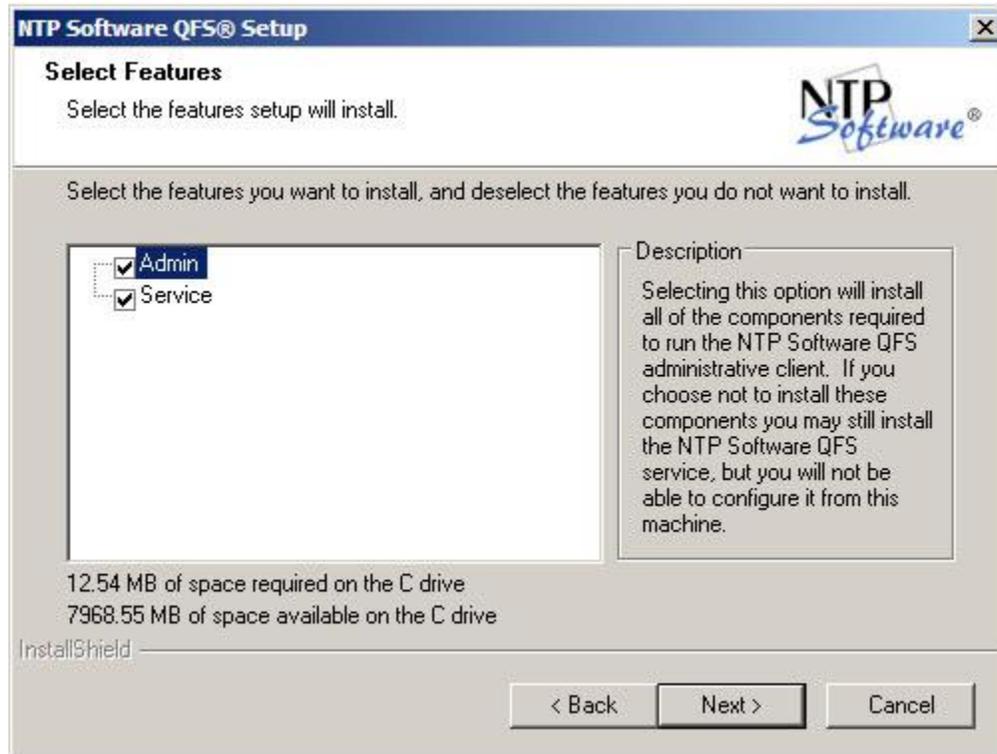
2. In the **License Agreement** dialog box, select **I accept the terms of the license agreement**, then click **Next**.



3. In the **Choose Destination Location** dialog box, browse to the desired destination, or click **Next** if the default destination location is appropriate.



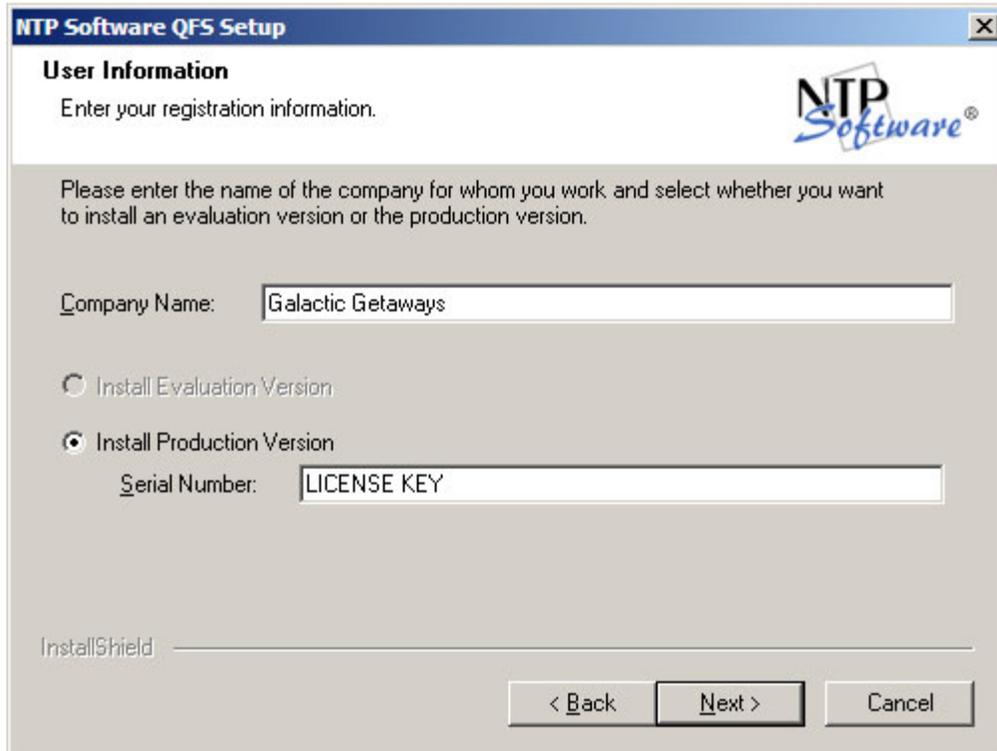
4. In the **Select Features** dialog box, make sure that the Admin and Service components are selected, then click **Next**.



NOTE:

- Because this is the only server at this point, you need both the Service and the Admin applications.
- If **Admin** is selected, the admin shortcuts are created, which does not add noticeable time to the installation.

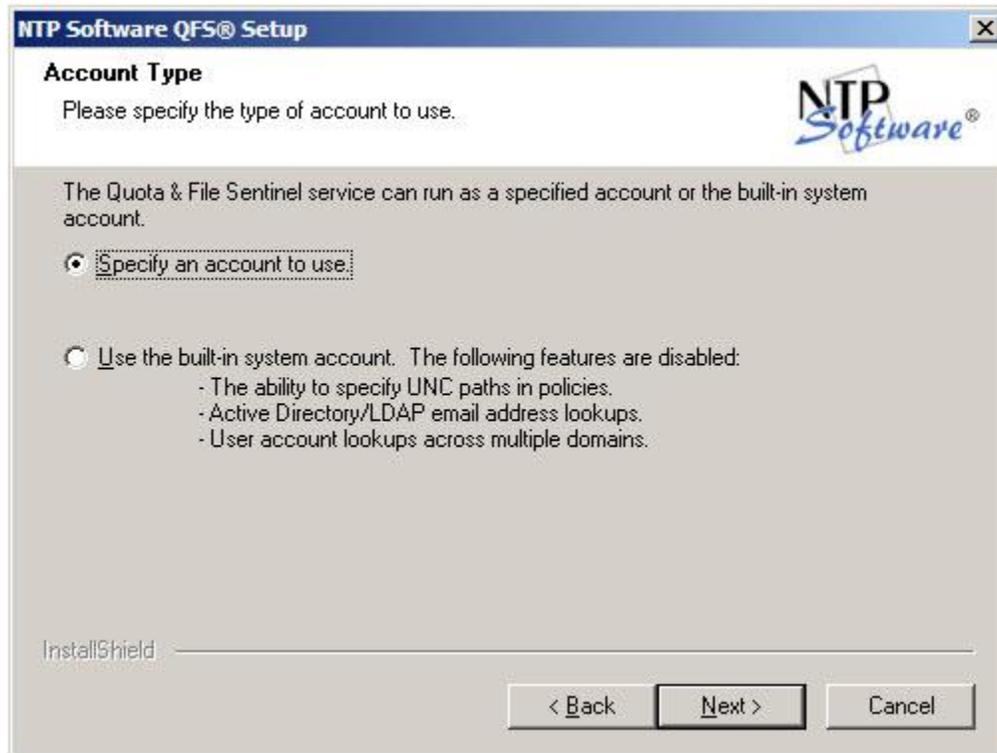
5. In the **User Information** dialog box, you are prompted to enter the DefendX Software Control-QFS for Windows product serial number that appears on your DefendX Software Control-QFS for Windows product registration card.



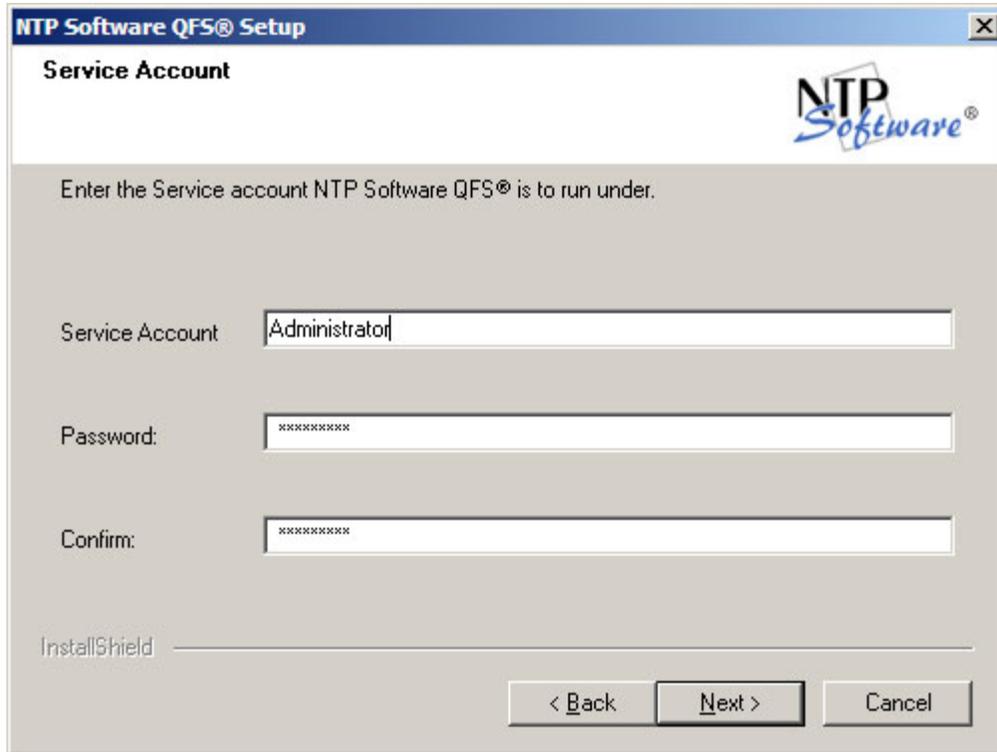
The screenshot shows a Windows-style dialog box titled "NTP Software QFS Setup". The main heading is "User Information" with the instruction "Enter your registration information." and the NTP Software logo. Below this, a message asks the user to enter their company name and select the installation version. The "Company Name" field contains "Galactic Getaways". There are two radio buttons: "Install Evaluation Version" (unselected) and "Install Production Version" (selected). The "Serial Number" field contains "LICENSE KEY". At the bottom, there is an "InstallShield" logo and three buttons: "< Back", "Next >", and "Cancel".

NOTE: If you enter alphabetical characters in lowercase, they are automatically converted to uppercase as you type.

6. In the **Account Type** dialog box, the Setup Wizard asks whether you want to specify an account to use or use the built-in system account for this setup. Select **Specify an account to use**.



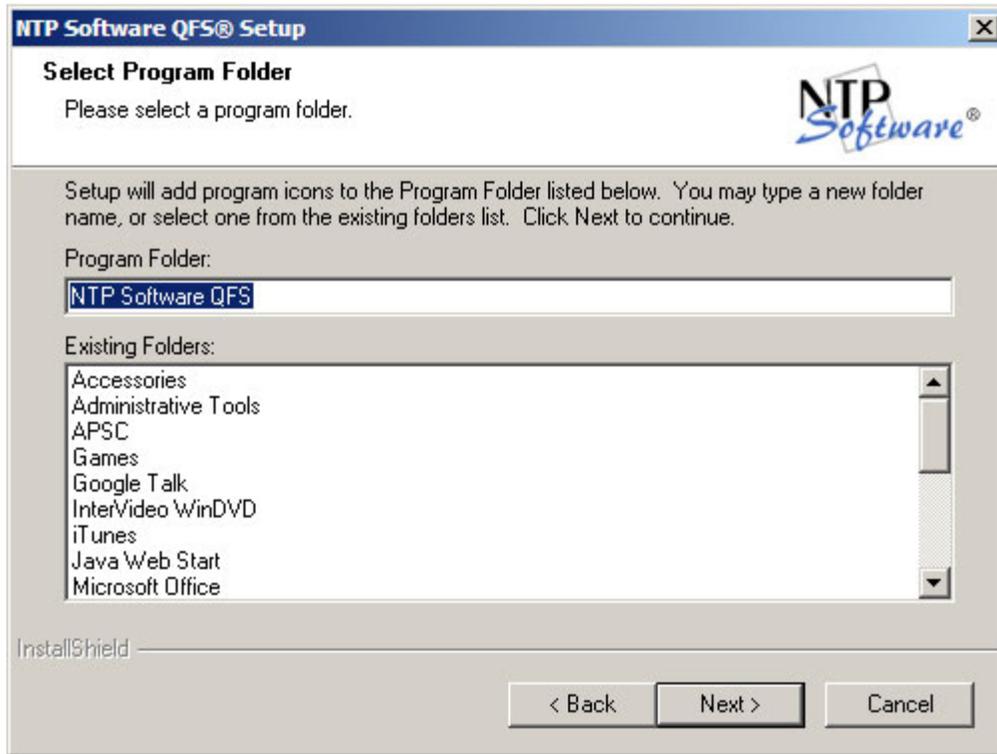
7. The **Service Account** dialog box appears, prompting you to specify an account ID under which the Control-QFS service account will run. Use the same account you used for the DefendX Software Smart Policy Manager Service (preferred) or specify another account, then click **Next**.



The screenshot shows a Windows-style dialog box titled "NTP Software QFS® Setup". The main heading is "Service Account". In the top right corner, there is the NTP Software logo. Below the heading, a message reads: "Enter the Service account NTP Software QFS® is to run under." There are three input fields: "Service Account" containing "Administrator", "Password:" containing "xxxxxxxx", and "Confirm:" containing "xxxxxxxx". At the bottom left, there is a checkbox labeled "InstallShield" which is currently unchecked. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

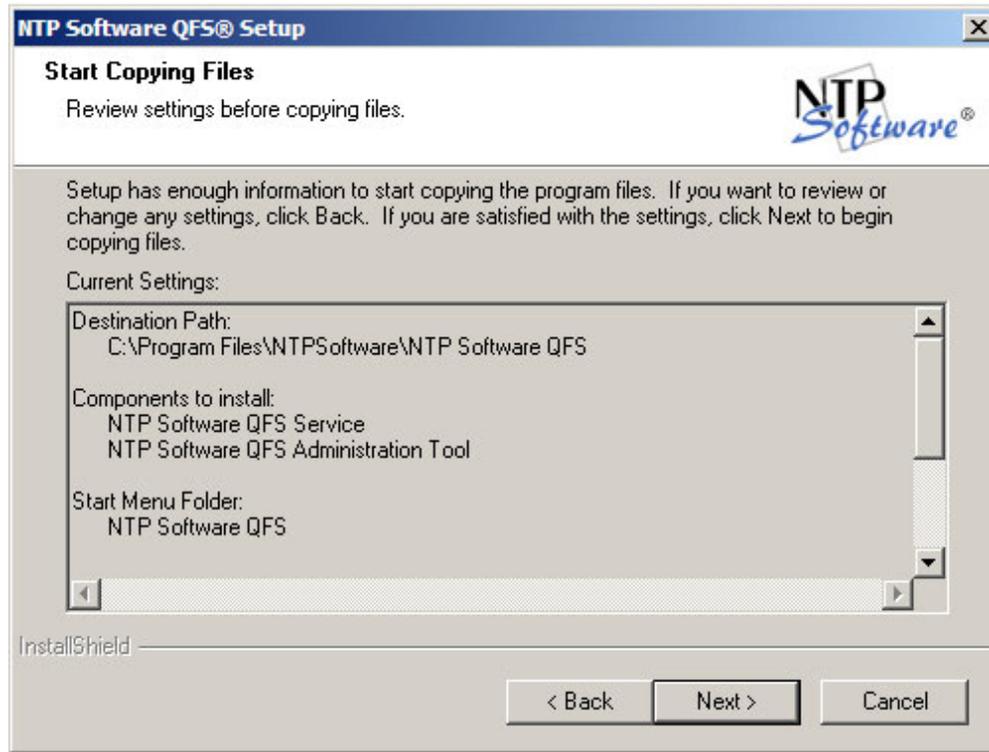
NOTE: The Control-QFS service requires special rights to enable Control-QFS to do its job. The setup process adds these rights automatically.

- Specify the program folder (using the default program folder is recommended) and click **Next**. The setup program adds program icons to the program folder.

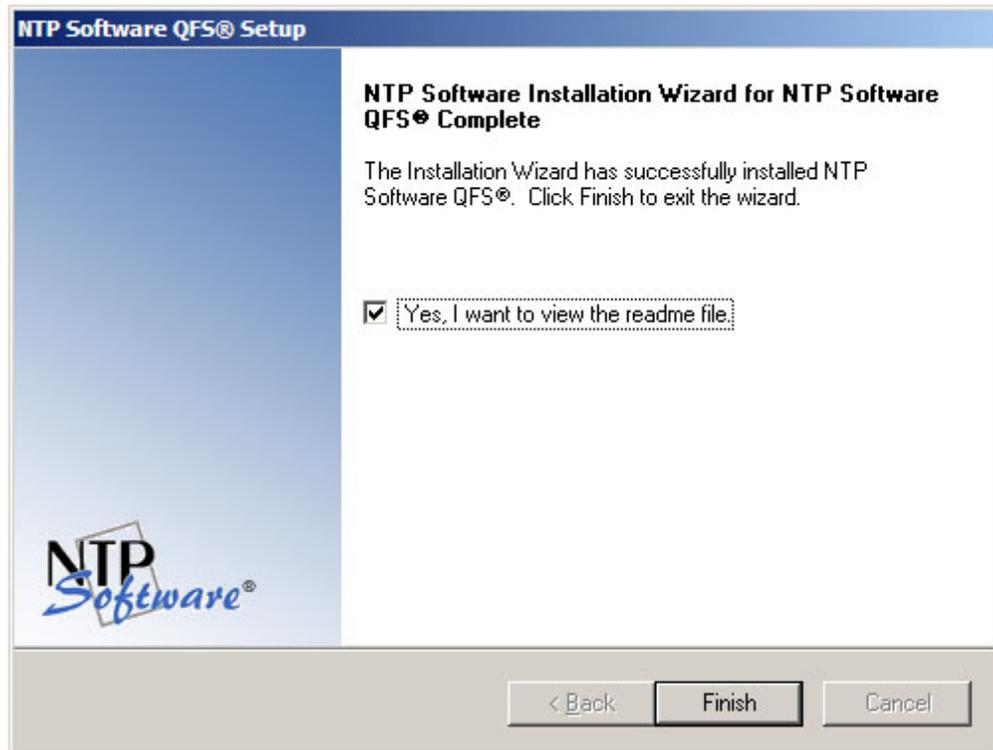


NOTE. DefendX Software Smart Policy Manager does not create any program group. Each SPM-enabled application creates its own program group during installation.

9. When the **Start Copying Files** dialog box appears, if the destination paths are correct, click **Next**. DefendX Software Control-QFS Setup begins transferring files to the specified locations.



10. When the file installation is complete, a dialog box offers you the opportunity to view the readme file. If you do not want to view the readme file at this time, clear the option **Yes, I want to view the readme file**. Click **Finish**. With this step, DefendX Software Control-QFS installation is complete.



Verifying Your Installation

At this point, your system should have both the DefendX Software Smart Policy Manager service (**EASE System Manager**) and the DefendX Software Control-QFS for Windows service (**DefendX Software Control-QFS**) installed and running. Setup will have started both services automatically.

You can verify that both services are running by looking at the Windows Service Manager. Click the Windows **Start** button and choose **All Programs > Control Panel > Administrative Tools > Services**.

About DefendX Software

DefendX Software helps organizations secure their critical business files and maximize the value of their enterprise file storage resources. From comprehensive intelligence, modeling, costing and chargeback to seamless file movement, protection and archiving, DefendX provides industry-leading capabilities to eliminate waste and align the value of files with the storage resources they consume. With DefendX, important file locations and the users who access them can be monitored to provide governance, protect against theft and enforce compliance policies. For more than 20 years, DefendX Software has been helping public and private sector customers around the world save money and eliminate risk every day.

DefendX Software Professional Services

DefendX Software's Professional Services offers consulting, training, and design services to help customers with their storage management challenges. We have helped hundreds of customers to implement cost-effective solutions for managing their storage environments. Our services range from a simple assessment to in-depth financial analyses.

For further assistance in creating the most cost-effective Storage Management Infrastructure, please contact your DefendX Software Representative at 800-390-6937.

Legal & Contact Information

The information contained in this document is believed to be accurate as of the date of publication. Because DefendX Software must constantly respond to changing market conditions, what is here should not be interpreted as a commitment on the part of DefendX Software, and DefendX Software cannot guarantee the accuracy of any information presented after the date of publication.

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