DefendX Software Mobility® Task Service for Generic

Installation Guide
Version 7.2

This guide provides quick instructions for the installation of DefendX Software Mobility Task Service, from an administrator's perspective. Upon completion of the steps within this document, DefendX Software Mobility Task Service will be installed within your enterprise community.

Table of Contents

Executive Summary

Thank you for your interest in DefendX Software Mobility. The latest addition to the DefendX Software product portfolio, DefendX Software Mobility enables employees to tier files; users can select from a predefined set of criteria such as file size, age of last access, or other criteria (Right-Click Data Movement™), and organizations can also establish policies that automatically tier files once users reach their storage limits (Event-Driven Data Movement™). Both methods enable companies to control storage and operating costs and to expedite backups by moving files from a primary storage environment to lower-cost tiered storage.

DefendX Software Mobility, in its simplest form, moves the contents of a file to a storage medium and leaves behind a stub to identify where its contents are located so the file can later be restored by DefendX Software Mobility. This gives customers the ability to reduce storage requirements by providing old files only when needed.

Requirements

This section highlights the main hardware and software requirements needed for a successful installation of DefendX Software Mobility Task Service for Generic.

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

Software Specification

Each Windows server must be running:

- Microsoft Windows® Server 2008 (SPn and R2), 2012 or 2012 R2

- Microsoft Services for NFS is required for tiering files located on NFS exports.

Installation

Prior to installing DefendX Software Mobility Task Service for Generic, DefendX Software recommends verifying that the installation server meets the requirements listed in the *Requirements* section of this document.

Installing DefendX Software Mobility Task Service

To install DefendX Software Mobility Task Service for Generic, perform the following steps:

1. Log on to your Windows machine by using an account with administrator privileges.

2. Launch the **Setup.exe** file.

3. When the **Welcome** dialog box appears, click **Next**.
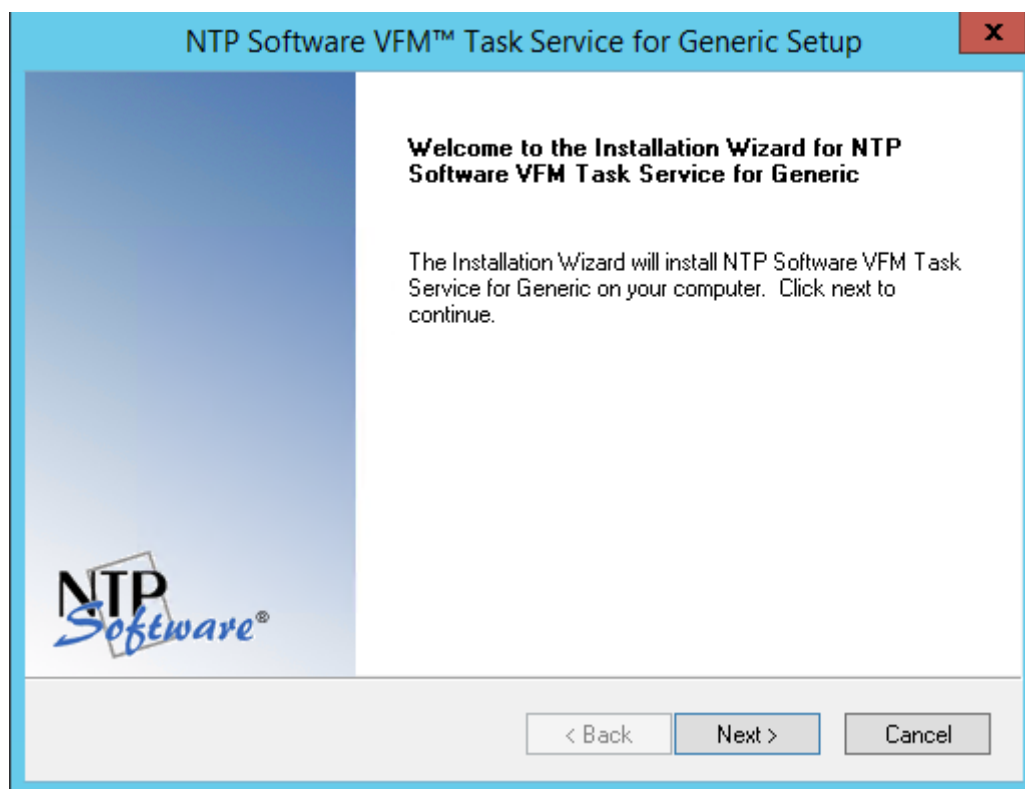
4. In the **License Agreement** dialog box, read the end-user license agreement. If you agree to the terms, select **I accept the terms of the license agreement** and then click **Next**. If you do not accept the terms, click **Cancel** to exit the installation.
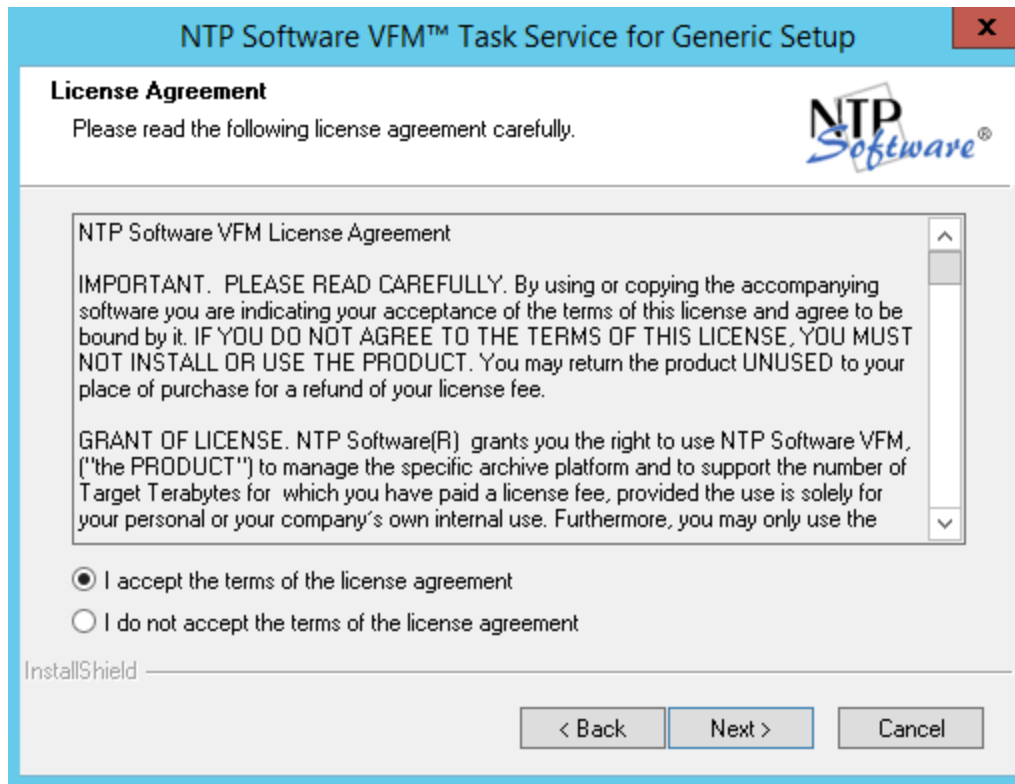
5. In the **User Information** dialog box, provide your company name and serial number, or select the **Install Evaluation Version** option if you are installing a trial version of the software, and then click **Next**.

6. In the **Choose Destination Location** dialog box, specify the destination location for the software installation. Click **Next**.
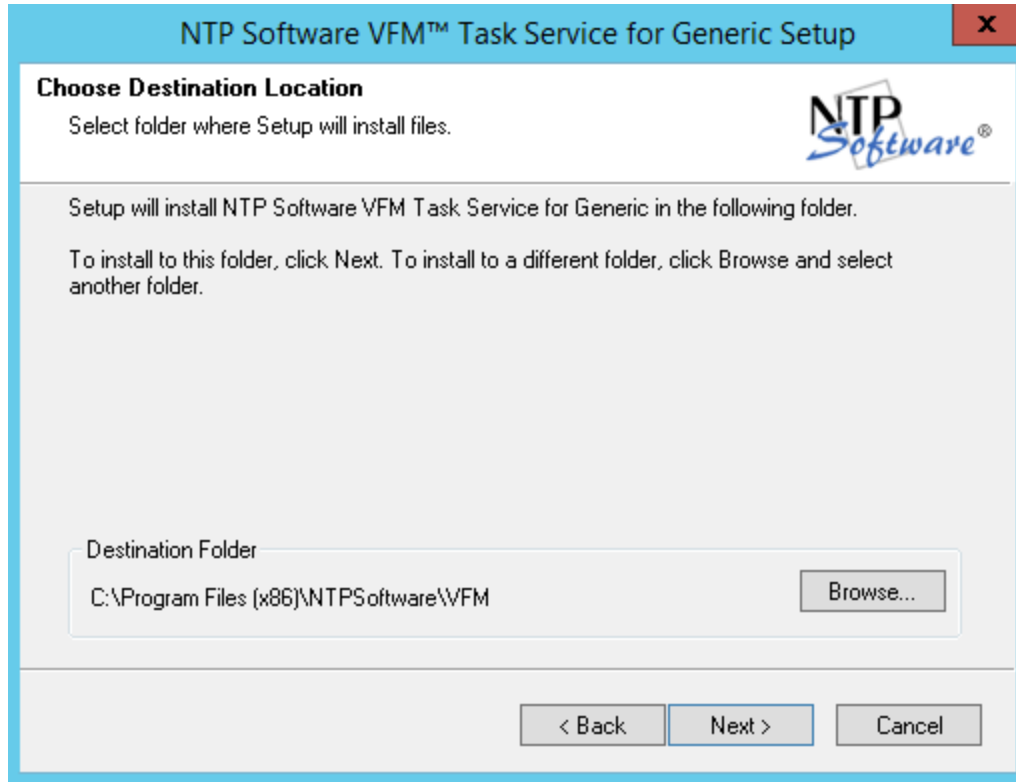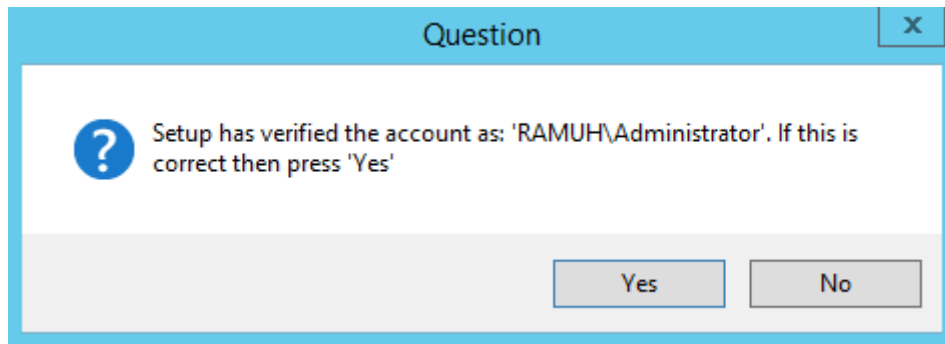
7. In the **Agent Configuration** dialog box, enter your full-permission Windows account information and then click **Next**.

NOTES:

- If the login account without the domain prefix is entered, the following dialog box will display to verify the domain of the account; click **Yes** if it is correct.

- The login account must have access and full permissions to the following:

1. It must be a member of the local host's Administrators group.
2. It must also be a member of the local administrators group on the generic server entered in Step 8 below if the generic server is a Windows server.
3. It must have full permissions to its installation folder, from Step 5 above.
4. It must have full permissions to the shares, folders and files on the server that you would like to tier. The name of the generic server is entered in Step 8 below.
5. It must have full permissions to the secondary storage device and/or location. The secondary storage is defined in the DefendX Software Mobility Web Administration for each server. The server entered in Step 8 will appear in the DefendX Software Mobility Administration web site – Primary Servers page within 60 seconds after his task service installation is complete.
6. Test access to the generic server and secondary storage device by pinging them by name to ensure that the local DNS settings are properly configured on this server.
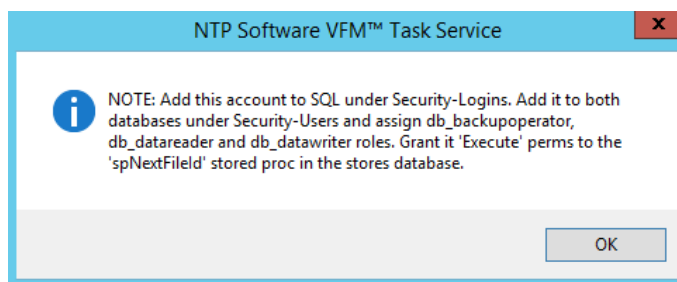
7. The service account must be added as a login account to SQL Server under Security – Logins. The account must also be added to both databases under Security – Users and be assigned db_backupoperator, db_datareader and db_datawriter role membership. In addition, this user must be granted "Execute" permissions to the "spNextFileId" stored procedure in the DefendXSoftwarePrecisionTieringStores database

8. In the **Mobility Web Administration Site** dialog box, enter the http address of the DefendX Software Mobility admin web site based on the server name used while installing the DefendX Software Mobility administration web site. Click Next.

9. In the **DefendX Software Mobility Generic Host Name** dialog box, enter the fully qualified name of the host you would like to tier files from. Click **Next**.

NOTE: To add additional generic hosts to be controlled by this Task Service use the DefendX Software Mobility Administrator web site – Primary Servers page to assign additional generic hosts to this task service..

10. In the **Start Copying Files** dialog box, review your settings. Click **Back** to make any changes; otherwise, click **Next** to begin copying the files.
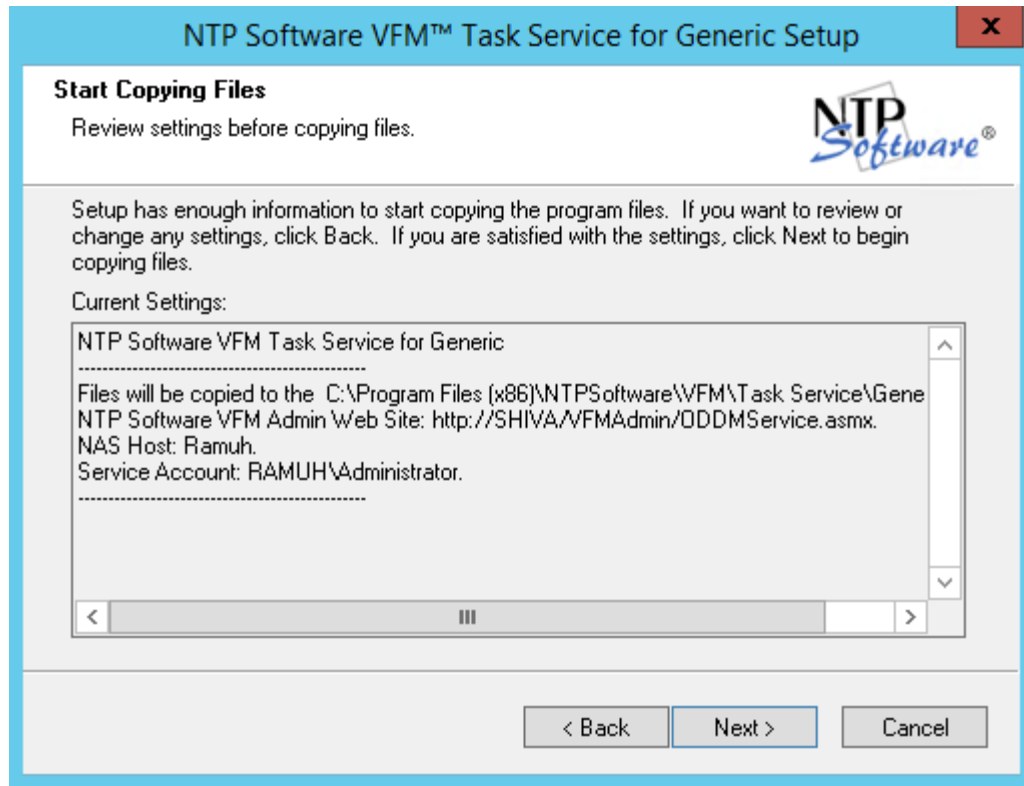
11. On the **Mobility Task Service** dialog, click **OK**.
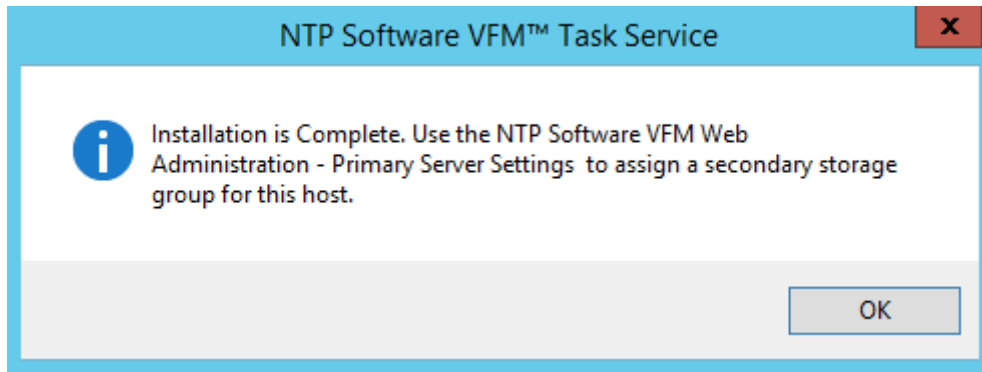
12. When all files are copied, a final screen informs you that the installation is complete. Click **Finish** to complete the process.

About DefendX Software

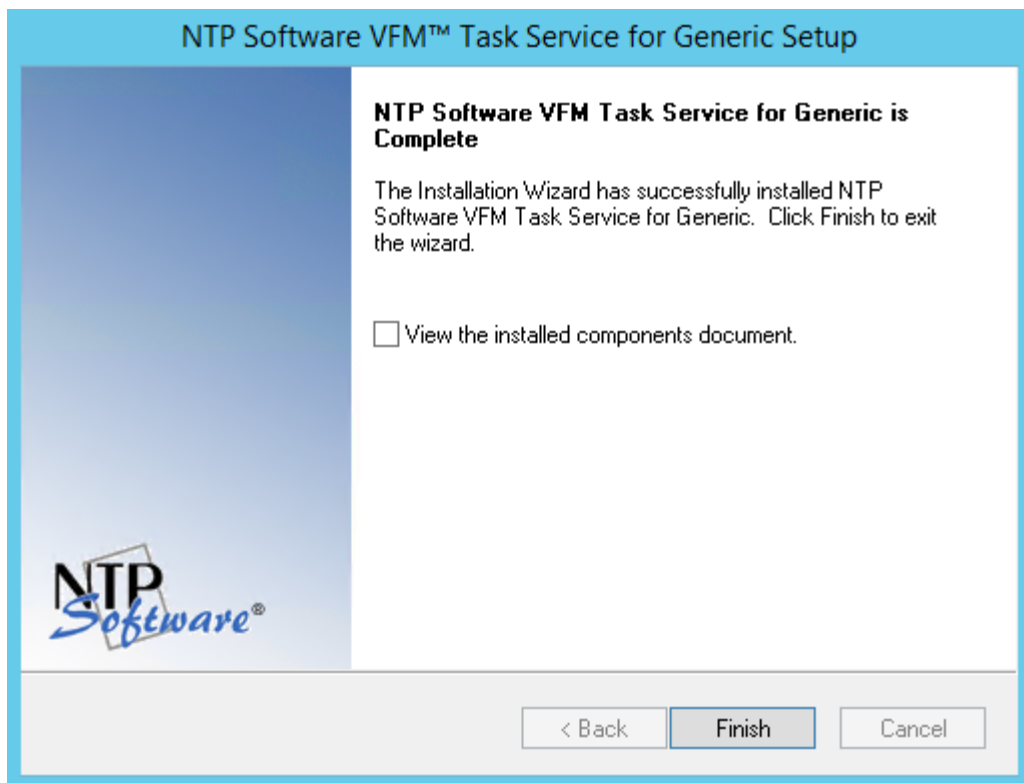DefendX Software helps organizations secure their critical business files and maximize the value of their enterprise file storage resources. From comprehensive intelligence, modeling, costing and chargeback to seamless file movement, protection and archiving, DefendX provides industry-leading capabilities 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.

This user manual is for informational purposes only. DEFENDX SOFTWARE MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT.

DefendX Software and other marks are either registered trademarks or trademarks of DefendX Software in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

DefendX Software products and technologies described in this document may be protected by United States and/or international patents.

DefendX Software
119 Drum Hill Road, #383
Chelmsford MA 01824
Phone: 1-800-390-6937
E-mail: info@DefendX.com
Web Site: http://www.DefendX.com