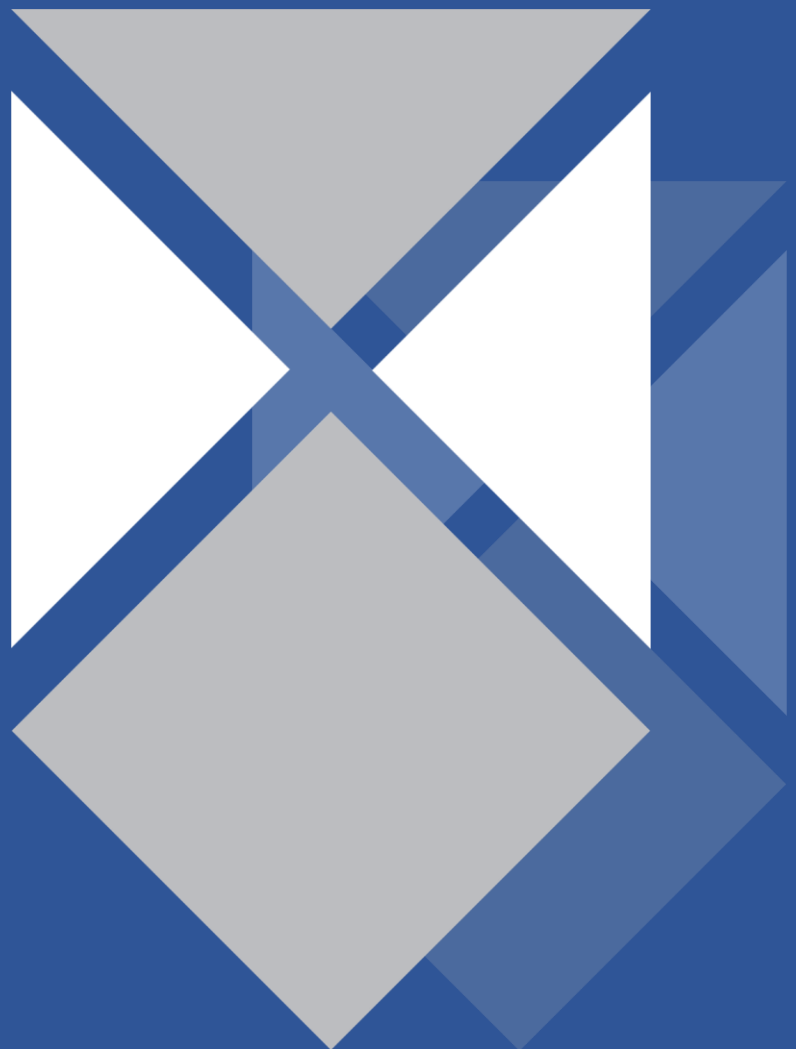




# DefendX Software Mobility® Task Service for NetApp Installation Guide Version 7.2

*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.*



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## 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 NetApp.

### 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

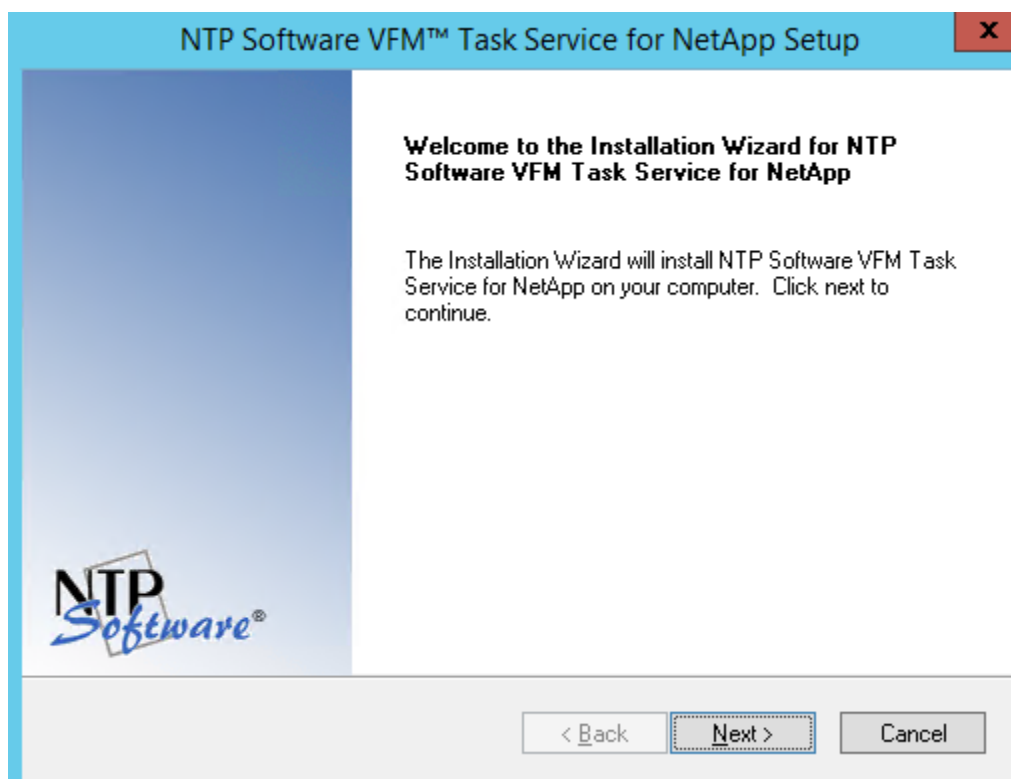
## Installation

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

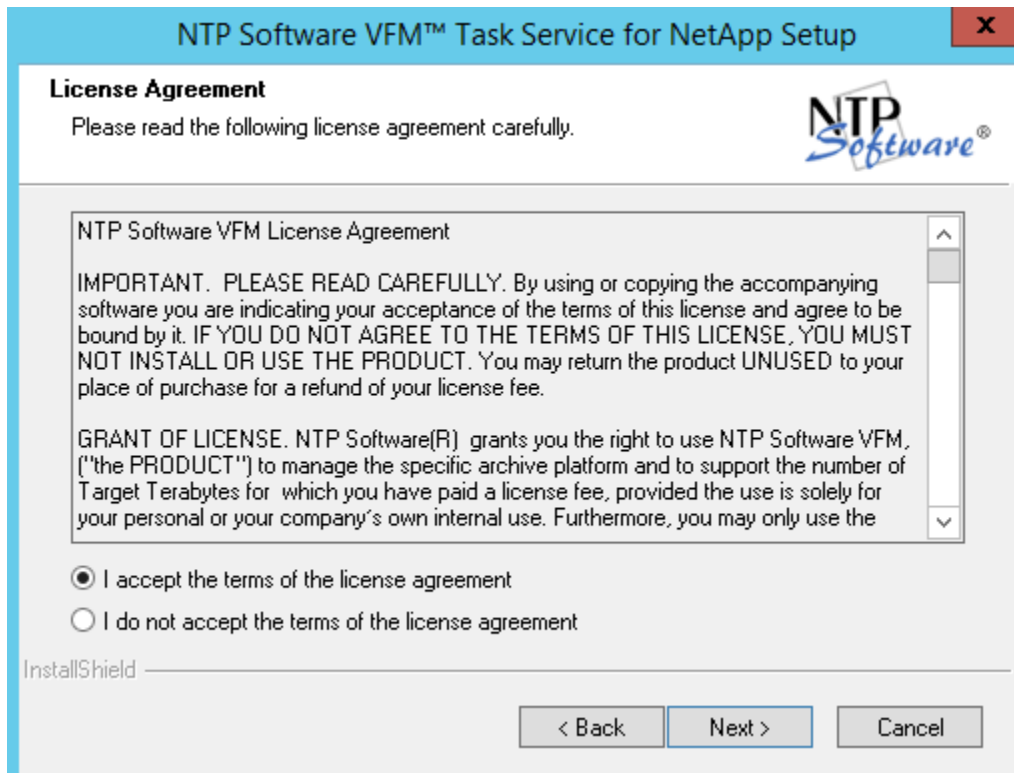
### Installing DefendX Software Mobility Task Service

To install DefendX Software Mobility Task Service for NetApp, 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.

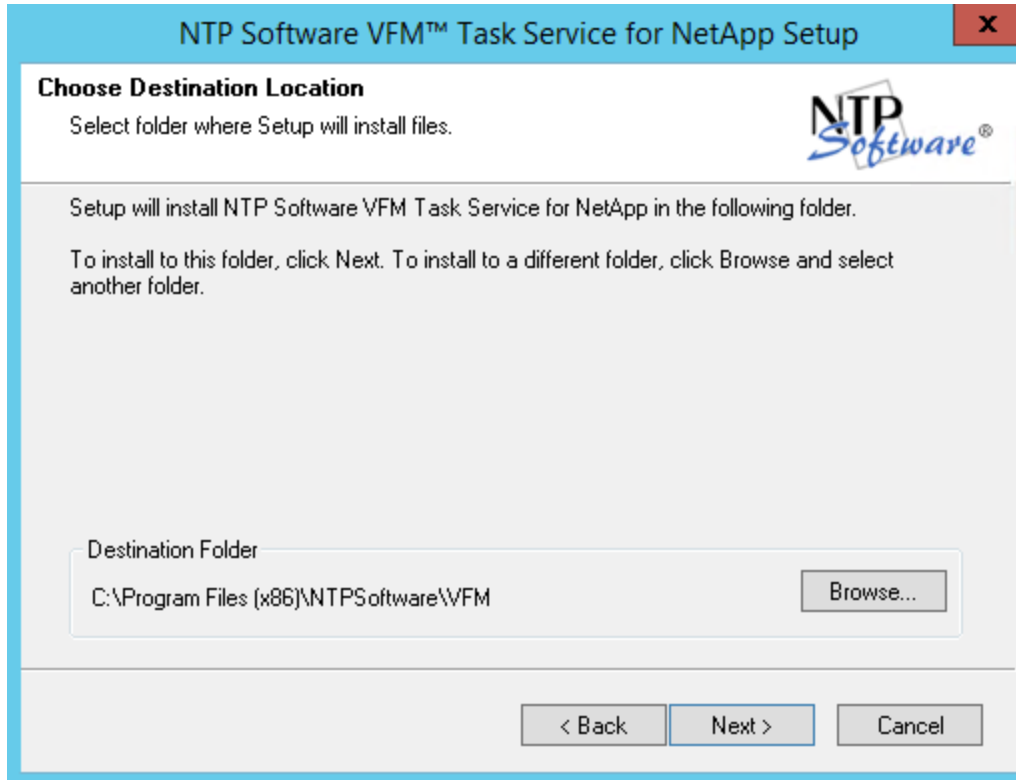


5. In the **User Information** dialog box, provide your company name and serial number, or select the **Install Evaluation Version** option if you are installing a trial version of the software, and then click **Next**.

The screenshot shows a Windows-style dialog box titled "NTP Software VFM™ Task Service for NetApp Setup". The dialog has a blue header bar with a close button (X) in the top right corner. The main content area is titled "User Information" and contains the following elements:

- A sub-header "User Information" followed by the instruction "Enter your registration information." and the NTP Software logo.
- A paragraph: "Please enter the name of the company for whom you work and select whether you want to install an evaluation version or the production version."
- A text label "Company Name:" followed by a text input field containing the placeholder text "Company Name".
- Two radio button options:
  - Install Evaluation Version
  - Install Production Version
- A text label "Serial Number:" followed by a text input field containing the placeholder text "SERIAL".
- An "InstallShield" progress indicator at the bottom left.
- Three buttons at the bottom right: "< Back", "Next >", and "Cancel".

6. In the **Choose Destination Location** dialog box, specify the destination location for the software installation. Click **Next**.



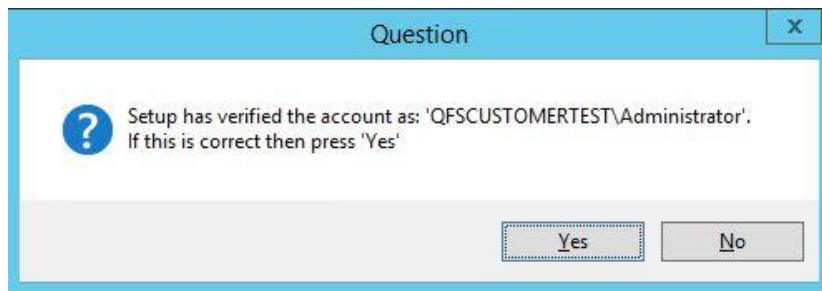


7. In the **Agent Configuration** dialog box, enter your full-permission Windows account information and then click **Next**.

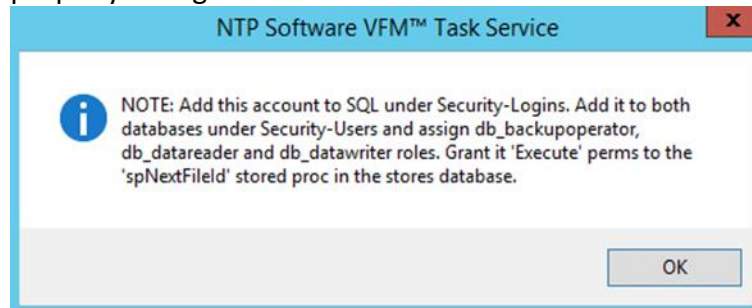
The screenshot shows a dialog box titled "NTP Software VFM™ Task Service for NetApp Setup" with a close button (X) in the top right corner. The main heading is "Agent Configuration" and the sub-heading is "Security Context". The NTP Software logo is in the top right. The text reads: "Please provide a windows login account. The task service will be configured to run in this context. This account will need full permissions to the NAS CIFS shares and its directories as well as to the secondary storage device, (if applicable), and will also require a SQL Login. Refer to the Installation Guide for more details." There are three input fields: "Login" with the text "Administrator", "Password" with "\*\*\*\*\*", and "Confirm" with "\*\*\*\*\*". At the bottom are three buttons: "< Back", "Next >", and "Cancel".

## 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.

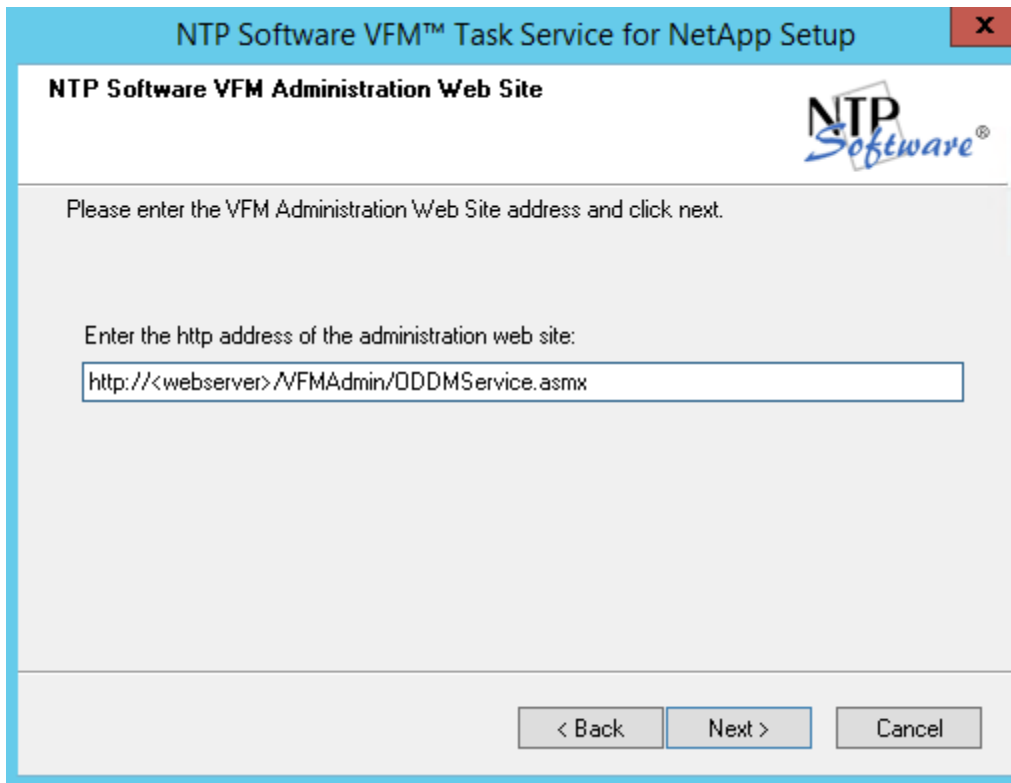


- The login account must have access to and full permissions to the following:
  1. It must be a member of the local host's Administrators group.
  2. It must have full permissions to its installation folder, from Step 5 above.
  3. It must have full permissions to the shares, folders and files on the NAS server that you would like to tier. The name of the NAS server is entered in Step 8 below.
  4. 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 NAS server. The NAS server entered in Step 8 will appear in the Web Administration – Primary Servers page within 60 seconds after his task service installation is complete.
  5. Test access to the NAS server and secondary storage device by pinging them by name to ensure that the local DNS settings are properly configured on this server.



6. 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 Administration Web 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**.



NTP Software VFM™ Task Service for NetApp Setup

**NTP Software VFM Administration Web Site**

Please enter the VFM Administration Web Site address and click next.

Enter the http address of the administration web site:

http://<webserver>/VFMAdmin/ODDMService.asmx

< Back   Next >   Cancel

9. In the **NetApp Host Name** dialog box, enter the fully qualified name of the NetApp host. Click **Next**.

**NetApp Host Name**

Please enter the name of the NetApp host for which you want to tier files from. When this installation is complete, you can use the NTP Software VFM Web Administration Site to add additional NetApp hosts to this task server. Note: The host must be running ONTAP version 7.3.0 or later.

Enter the fully qualified name or the netbios name of the NetApp host:

NetApp Host Name

< Back    Next >    Cancel

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

10. At the **NetApp Cluster Mode Settings** screen, leave all fields blank and click **Next** if running NetApp 7-Mode. If running NetApp Cluster Mode, provide the cluster IP and login credentials before clicking **Next**.

NTP Software VFM™ Task Service for NetApp Setup

**NetApp Cluster Mode Settings**

For NetApp 7-Mode leave all these settings blank. For NetApp Cluster Mode enter the IP Address of the cluster and its login credentials.

Cluster IP: ClusterIP

Login Id: Login

Password: ●●●●●●●●●●

Confirm: ●●●●●●●●●●

InstallShield

< Back   Next >   Cancel

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

NTP Software VFM™ Task Service for NetApp Setup

**Start Copying Files**

Review settings before copying files.

Setup has enough information to start copying the program files. If you want to review or change any settings, click Back. If you are satisfied with the settings, click Next to begin copying files.

Current Settings:

NTP Software VFM Task Service for NetApp

Files will be copied to the C:\Program Files (x86)\NTPSoftware\VFM\Task Service\NetApp

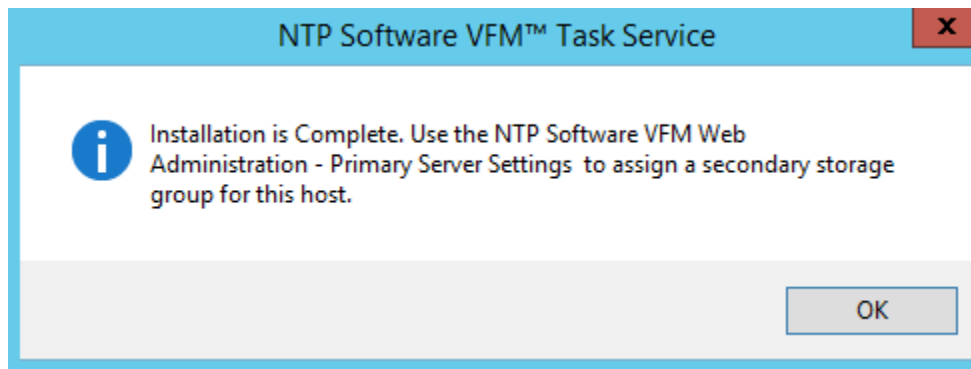
NTP Software VFM Admin Web Site: http://SHIVA/VFMAAdmin/ODDMService.aspx

NAS Host: NetApp.

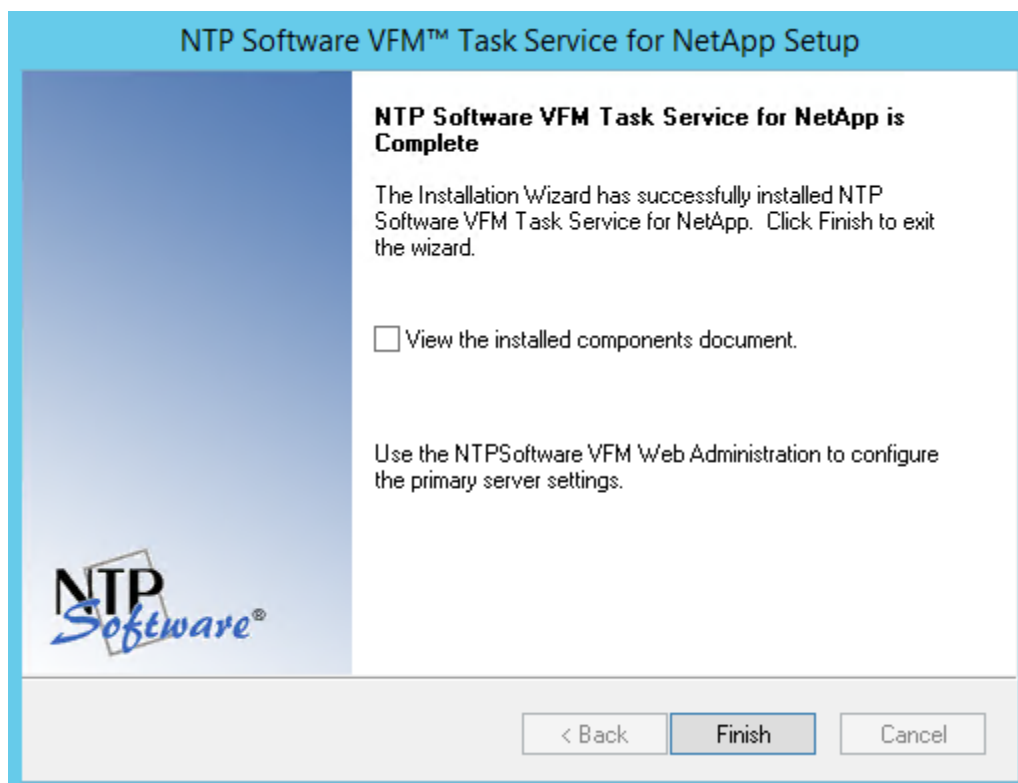
Service Account: SHIVA\Administrator.

<   Back   Next >   Cancel

12. On the **Mobility™ Task Service** dialog, click **OK**.



13. 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.

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