



DefendX Software Mobility®

Task Service for Windows®

Installation Guide

Version 7.5

This guide provides quick instructions for the installation of DefendX Software MobilityM 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.

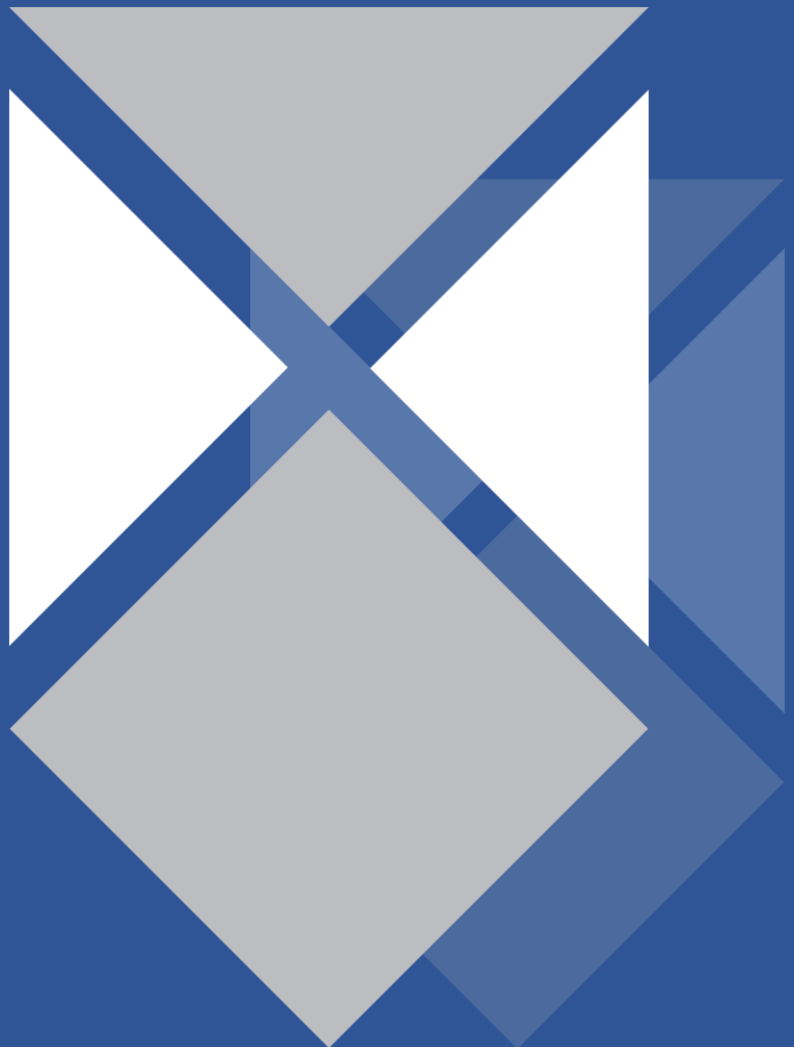


Table of Contents

Executive Summary..... 3

Requirements 4

 Hardware Specification 4

 Software Specification 4

Installation 4

Installing DefendX Software Mobility Task Service..... 4

About DefendX Software 11

DefendX Software Professional Services 11

Legal & Contact Information 12

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 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:

- 2.2+ GHz CPU
- 2 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

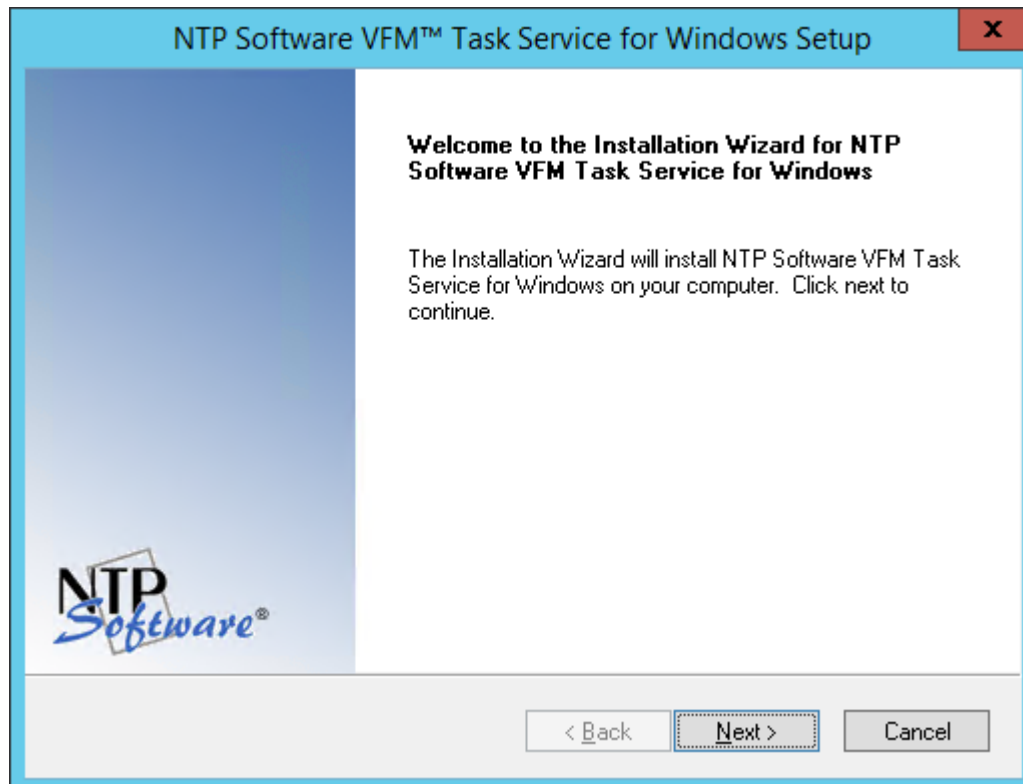
Installation

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

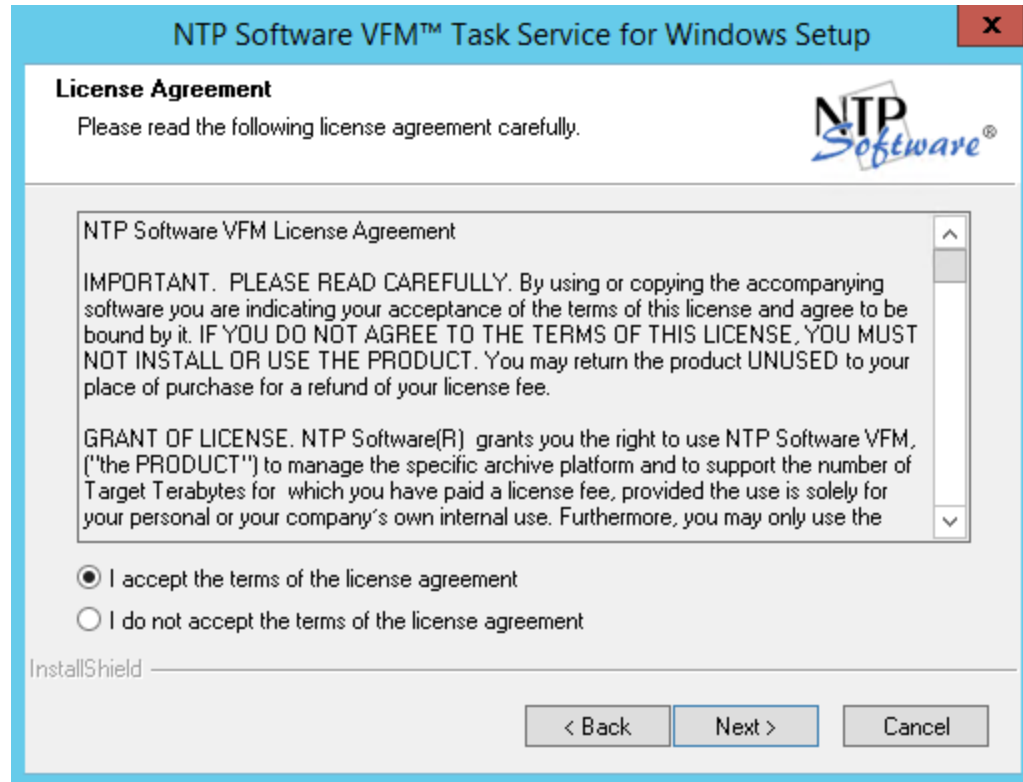
Installing DefendX Software Mobility Task Service

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

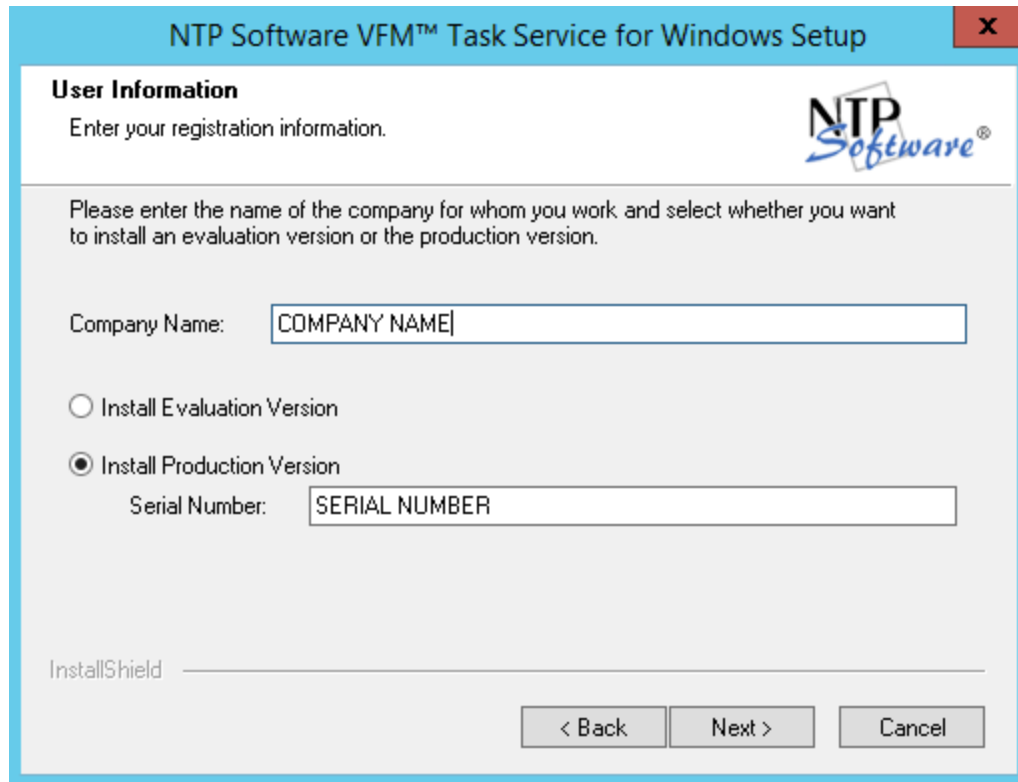
1. Log on to your Windows machine by using an account with administrator privileges.
2. Launch the **Setup.exe** file.
3. When the **Welcome** dialog box appears, click **Next**.



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.

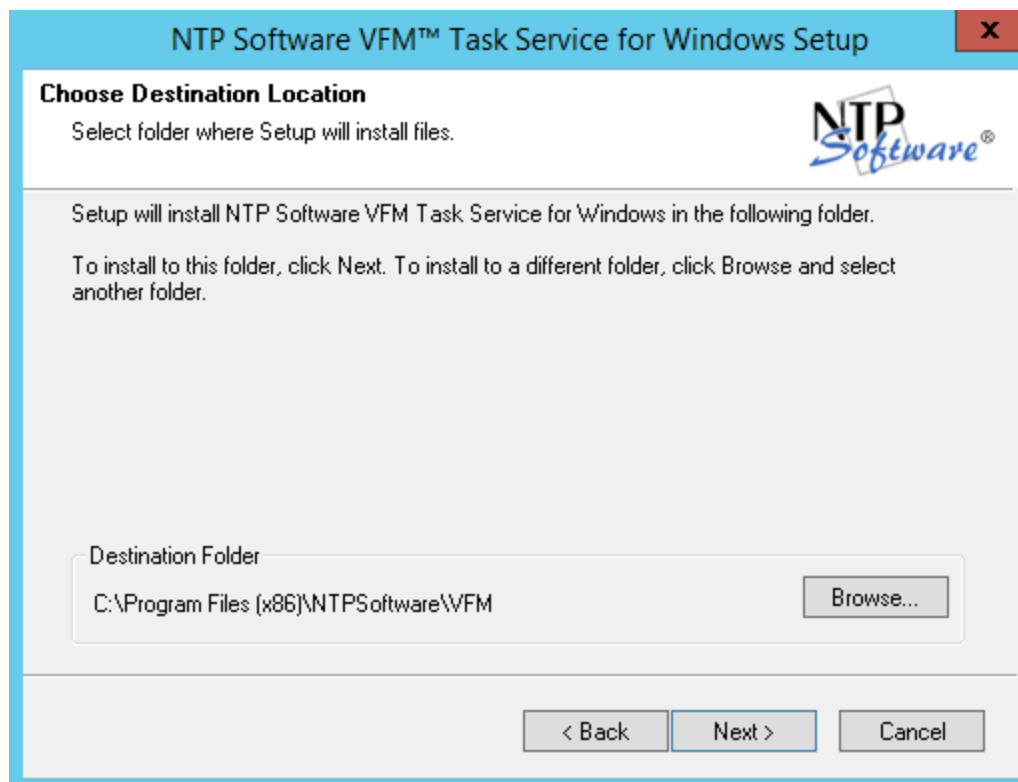


5. In the **User Information** dialog box, provide your company name and serial number, or select the **Install Evaluation Version** option if you are installing a trial version of the software, and then click **Next**.



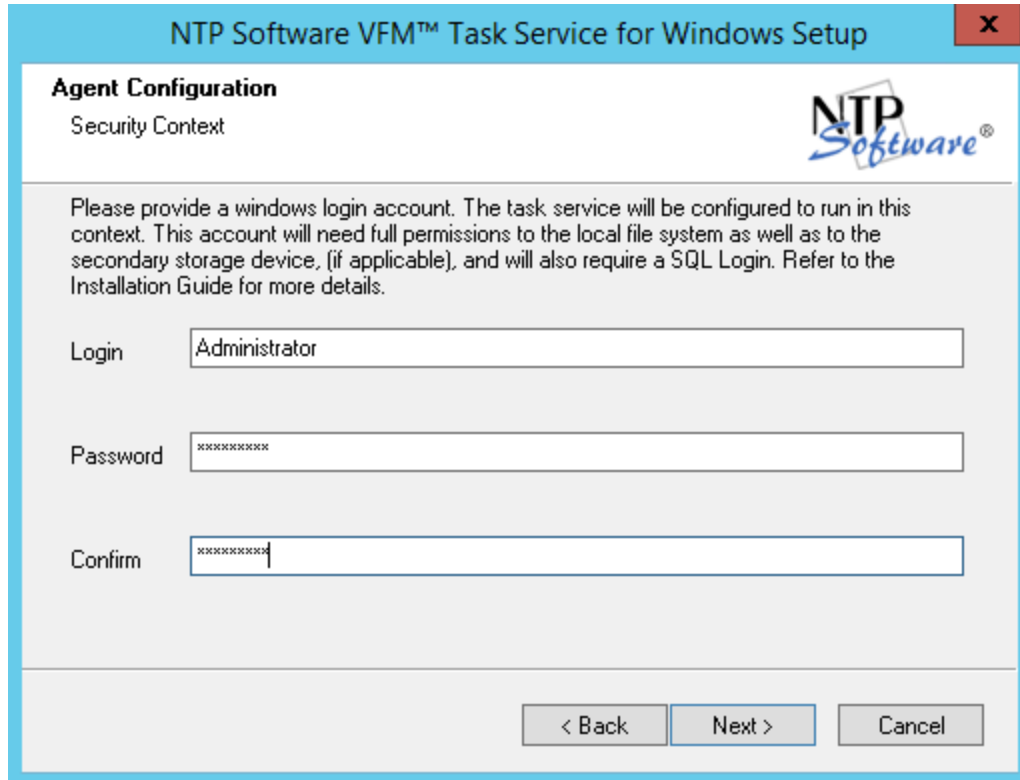
The dialog box is titled "NTP Software VFM™ Task Service for Windows Setup" with a close button (X) in the top right corner. The main heading is "User Information" with a sub-instruction "Enter your registration information." and the NTP Software logo. Below this, a text box says "Please enter the name of the company for whom you work and select whether you want to install an evaluation version or the production version." There is a text input field for "Company Name:" containing the placeholder text "COMPANY NAME". Below that are two radio button options: "Install Evaluation Version" (unselected) and "Install Production Version" (selected). Under the selected option is a text input field for "Serial Number:" containing the placeholder text "SERIAL NUMBER". At the bottom left is an "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

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



The dialog box is titled "NTP Software VFM™ Task Service for Windows Setup" with a close button (X) in the top right corner. The main heading is "Choose Destination Location" with a sub-instruction "Select folder where Setup will install files." and the NTP Software logo. Below this, a text box says "Setup will install NTP Software VFM Task Service for Windows in the following folder." followed by "To install to this folder, click Next. To install to a different folder, click Browse and select another folder." There is a text input field for "Destination Folder" containing the path "C:\Program Files (x86)\NTPSoftware\VFM". To the right of this field is a "Browse..." button. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

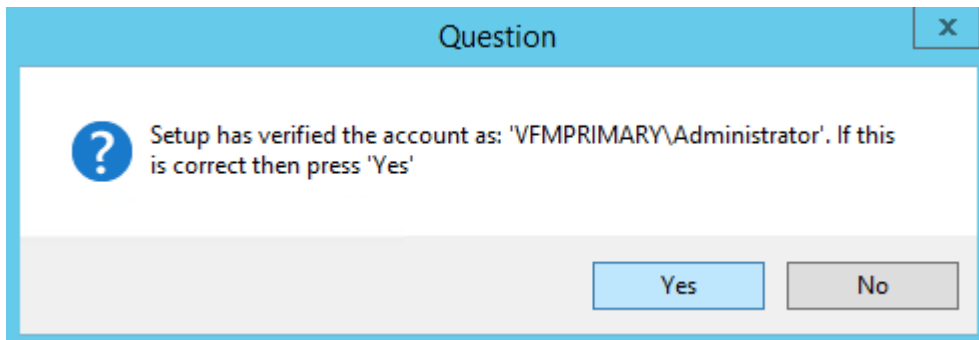
7. In the **Agent Configuration** dialog box, enter your full-permission Windows account information and then click **Next**.



The image shows a Windows Setup dialog box titled "NTP Software VFM™ Task Service for Windows Setup". The main heading is "Agent Configuration" with a sub-heading "Security Context". The NTP Software logo is in the top right. The text inside says: "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 local file system 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 "Administrator" entered, "Password" with "xxxxxxxx", and "Confirm" with "xxxxxxxx". 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 image shows a "Question" dialog box. It contains a question mark icon and the text: "Setup has verified the account as: 'VFMPRIMARY\Administrator'. If this is correct then press 'Yes'". At the bottom are two buttons: "Yes" and "No".

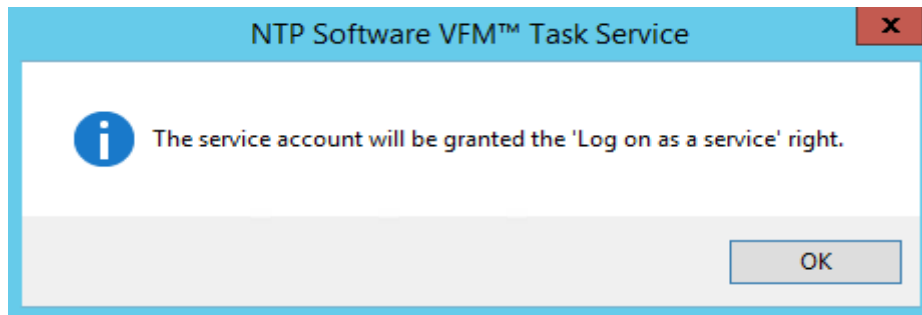
- The login account must have access to and full permissions to the following:
 1. It must be a member of the local host's Administrators group.
 2. It must have full permissions to its installation folder, from Step 6 above.
 3. It must have full permissions to the shares, folders and files on this Windows server that you would like to tier.
 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 Windows server. This Windows server will appear in the Web Administration – Primary Servers page within 60 seconds after his task service installation is complete.

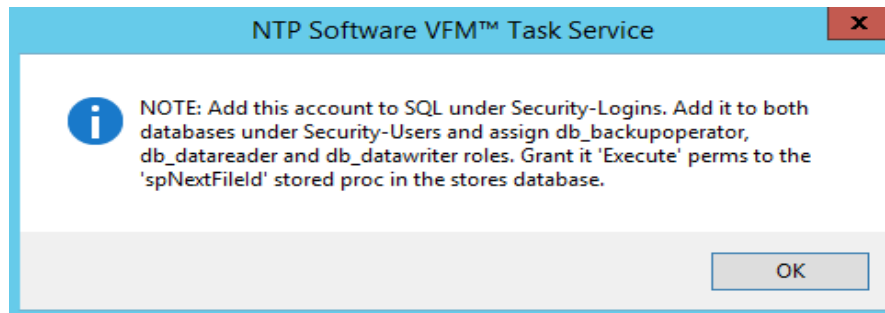
5. Test access to the secondary storage device by pinging it by name to ensure that the local DNS settings are properly configured on this server.

6. *[Some of the following tasks may be completed automatically]* 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 DefendXSoftwareMobilityStores ► Programmability ► Stored Procedures database.

8. Click **OK** to confirm that the service account will be granted the ‘Log on as a service’ right.



9. Click **OK** to confirm that the services account must be added to SQL Security-Logins, assigned the specified roles, and granted ‘Execute’ permission on the specified stored procedure.



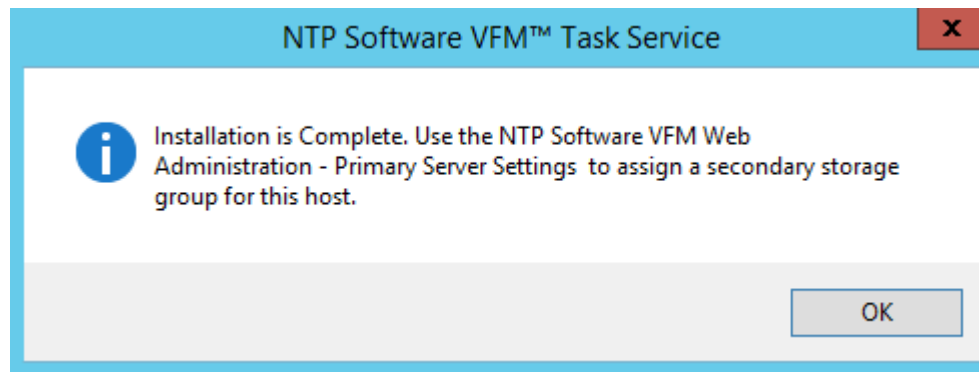
10. In the **Mobility Web Administration Site** dialog box, enter the http address of the DefendX Software Mobility admin web site based on the server name used while installing the DefendX Software Mobility Administration web site. Click **Next**.

The screenshot shows a Windows Setup dialog box titled "NTP Software VFM™ Task Service for Windows Setup". The main heading is "NTP Software VFM Administration Web Site". Below the heading is the NTP Software logo. The text says "Please enter the VFM Administration Web Site address and click next." Below this is a text box with the prompt "Enter the http address of the administration web site:". The text box contains the URL "http://<webserver>/VFMAdmin/ODDMService.aspx". At the bottom are three buttons: "< Back", "Next >", and "Cancel".

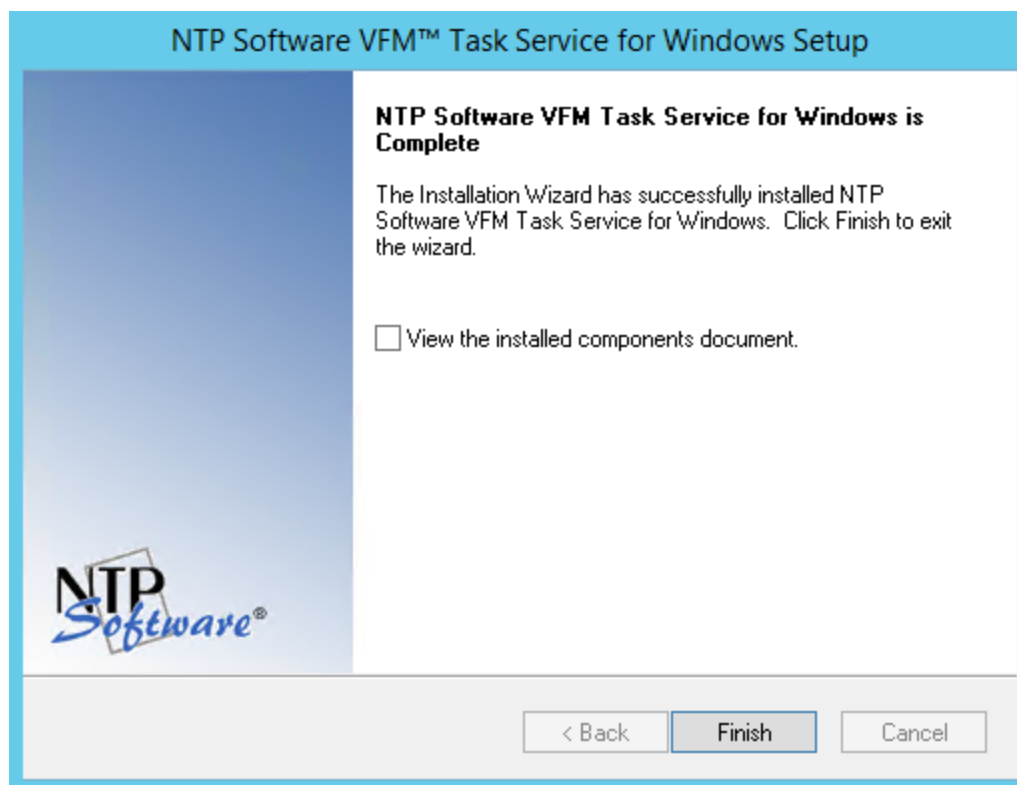
11. In the **Start Copying Files** dialog box, review your settings. Click **Back** to make any changes; otherwise, click **Next** to begin copying the files.

The screenshot shows the same Windows Setup dialog box, but now the main heading is "Start Copying Files". The text says "Review settings before copying files." Below this is the NTP Software logo. The text says "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." Below this is the text "Current Settings:". Below the text is a scrollable text box containing the following information: "NTP Software VFM Task Service for Windows", "Files will be copied to the C:\Program Files (x86)\NTPSoftware\VFM\Task Service\Wind", "NTP Software VFM Admin Web Site: http://VFMTEST/VFMAdmin/ODDMService.aspx.", and "Service Account: VFMPRIMARY\Administrator." At the bottom are three buttons: "< Back", "Next >", and "Cancel".

12. In the **Mobility™ Task Service** dialog box, 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.

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>

Copyright © 2019 DefendX Software. All rights reserved. All trademarks and registered trademarks are the property of their respective owners.

Doc#DFX1208EF