



DefendX Software Vision™

Analysis Server

Installation Guide

Version 9.1

This guide provides quick instructions for installing DefendX Software Vision™ Analysis Server from an administrator's perspective. This Installation Guide applies to all Windows®, all NAS NetApp® and all NAS EMC® editions. Upon completion of the steps within this document, DefendX Software Vision will be installed within your enterprise community.

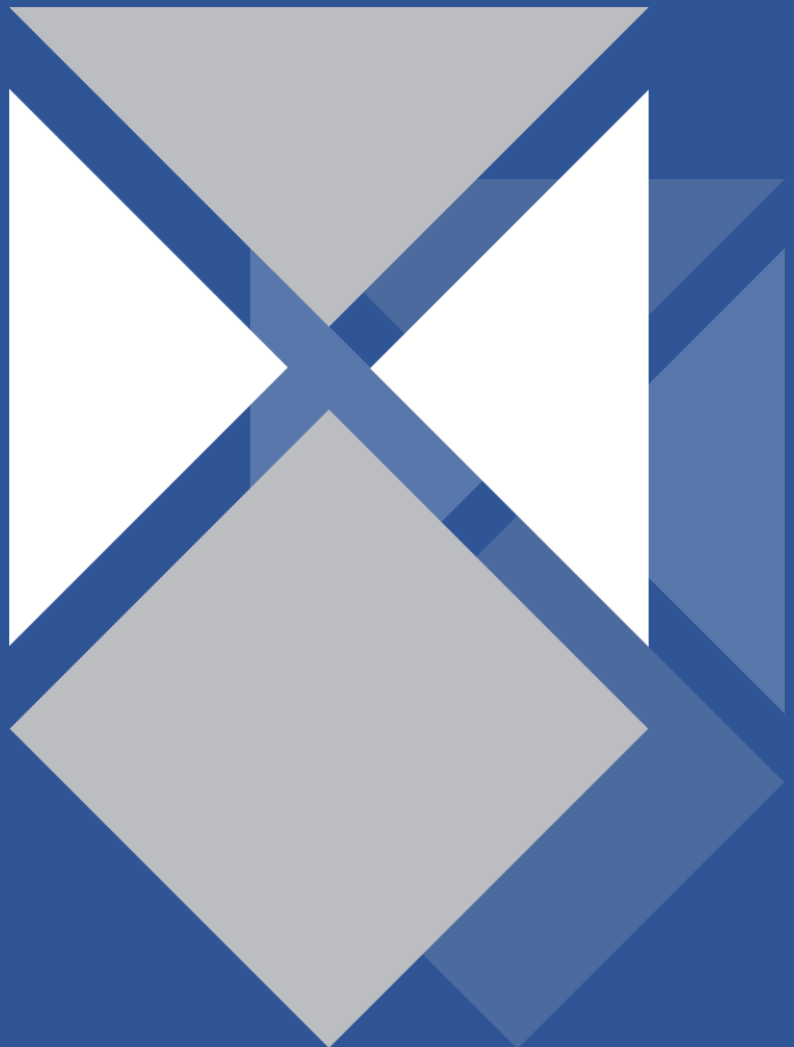


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Executive Summary

Thank you for your interest in DefendX Software Vision™. DefendX Software Vision is a critical component of an overall file data management (FDM) architecture and is part of the DefendX Software integrated suite of products. Together, DefendX Software's products are designed to help organizations control and report on their current and ever-growing Windows® storage infrastructure.

This document is a guide to the successful installation and configuration of DefendX Software Vision for all Windows®, all NAS NetApp® Filers and all NAS EMC® Celerra/VNX/Unity editions. It will take you about 15 minutes to complete the installation steps provided here. Further details for each step in this document, as well as more extensive configuration and usage options, can be found in the *DefendX Software Vision™ User Manual*.

Before You Begin

The hardware required to support DefendX Software Vision should be appropriate for the services running on the machine. For more specific DefendX Software Vision hardware requirements, please review the *Requirements* section of this document.

DefendX Software recommends using a single service account for installing DefendX Software Vision.

Requirements

Hardware Specification

Each server with DefendX Software Vision Analysis Server must meet the following minimum requirements prior to installation:

- 2.2 GHz CPU
- 2 GB RAM
- 50 MB free disk space

Software Specification

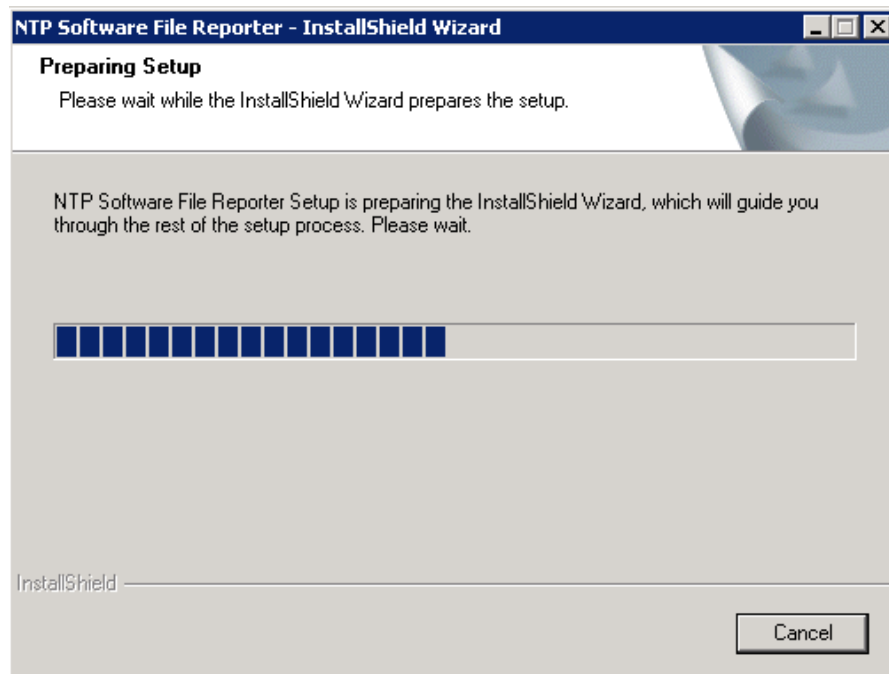
- Microsoft Windows Server® 2008 or later
- Microsoft .Net 3.5 Framework for DefendX Software Vision
- Microsoft Internet Information Services (IIS 6.0 or later) with Windows Authentication enabled
- ASP.NET 3.5
- Microsoft SQL Server 2005 or later
- Internet Explorer 6.0 or later
- Windows installer 4.5 or later

Installation

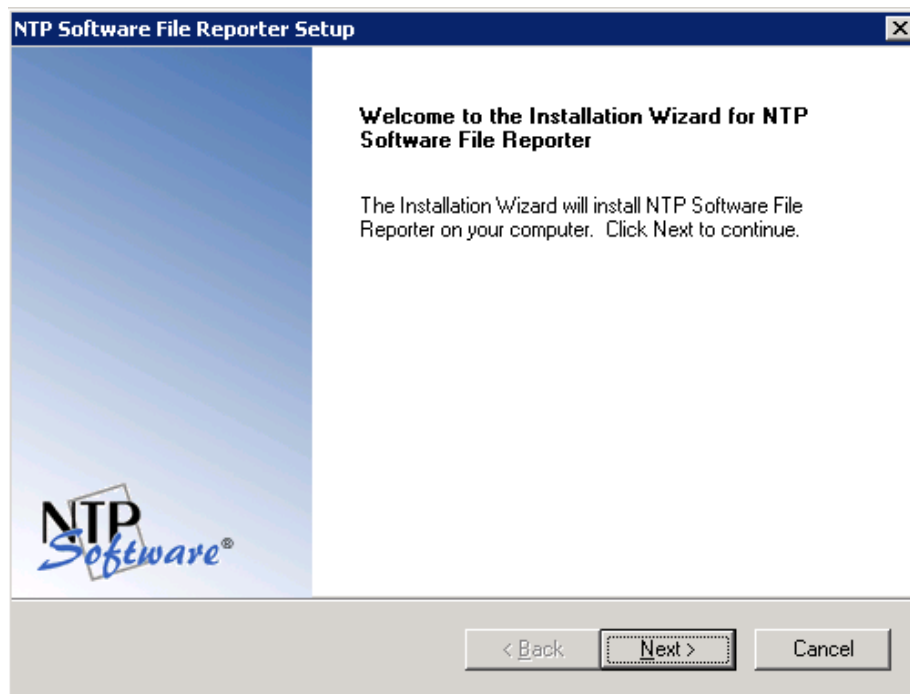
Prior to installing DefendX Software Vision Analysis Server, it is strongly recommended that you verify that the installation server meets the requirements listed in the *Requirements* section of this document.

Installing DefendX Software Vision Analysis Server

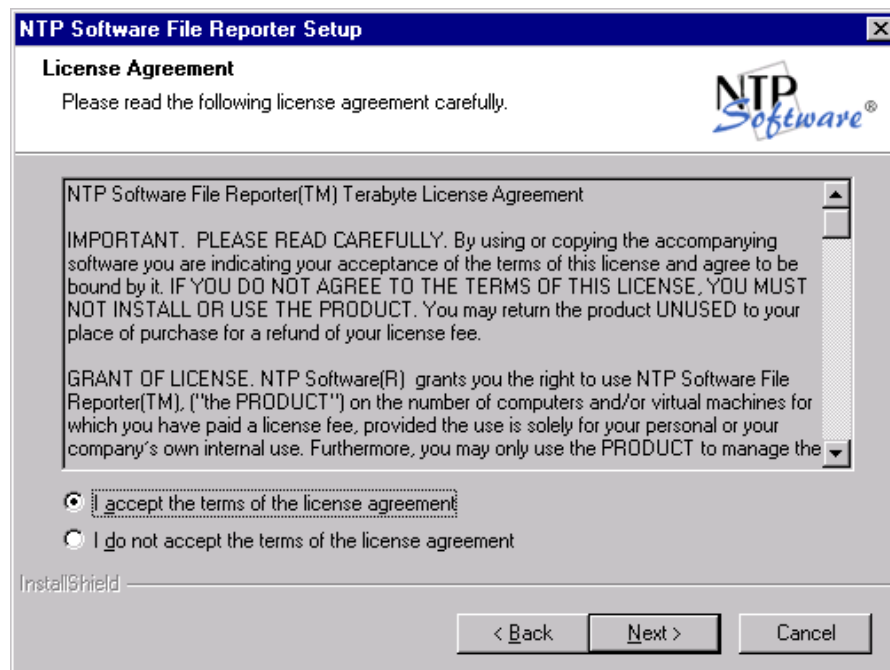
1. Log on to your server using an account with administrator privileges.
2. Launch the **Setup.exe** file.
3. In the **Preparing Setup** dialog box, the installation wizard prepares the installation.



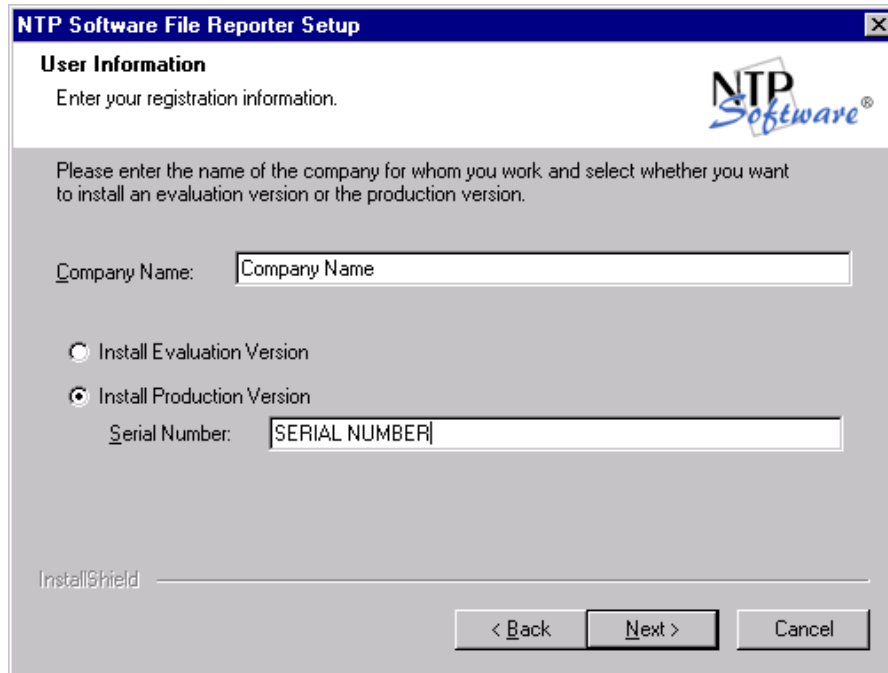
4. When the **Welcome** dialog box appears, click **Next**.



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.

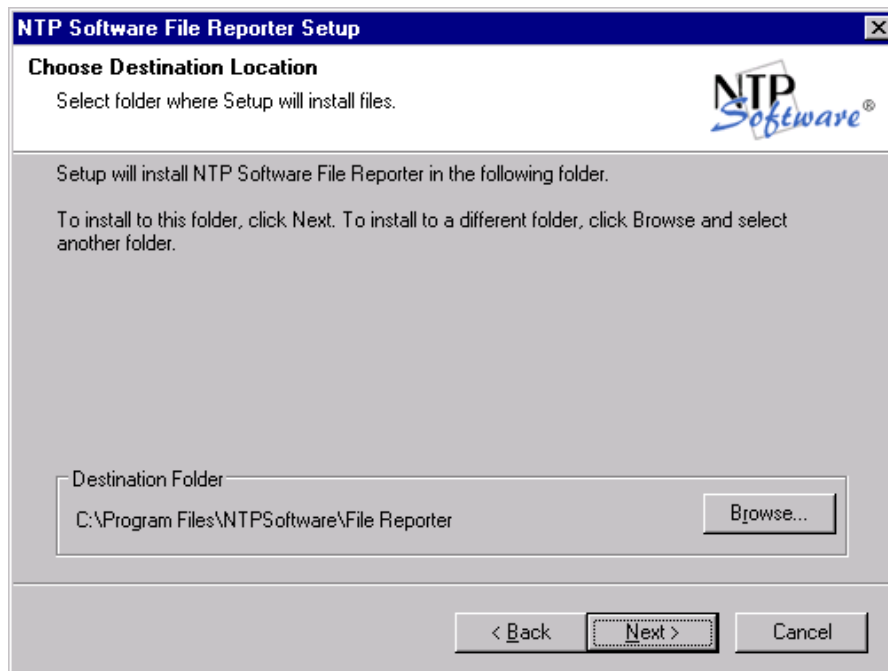


6. In the **User Information** dialog box, enter your company name and your software serial number, or select the **Install Evaluation Version** check box if you are installing a trial version of the software. Click **Next**.



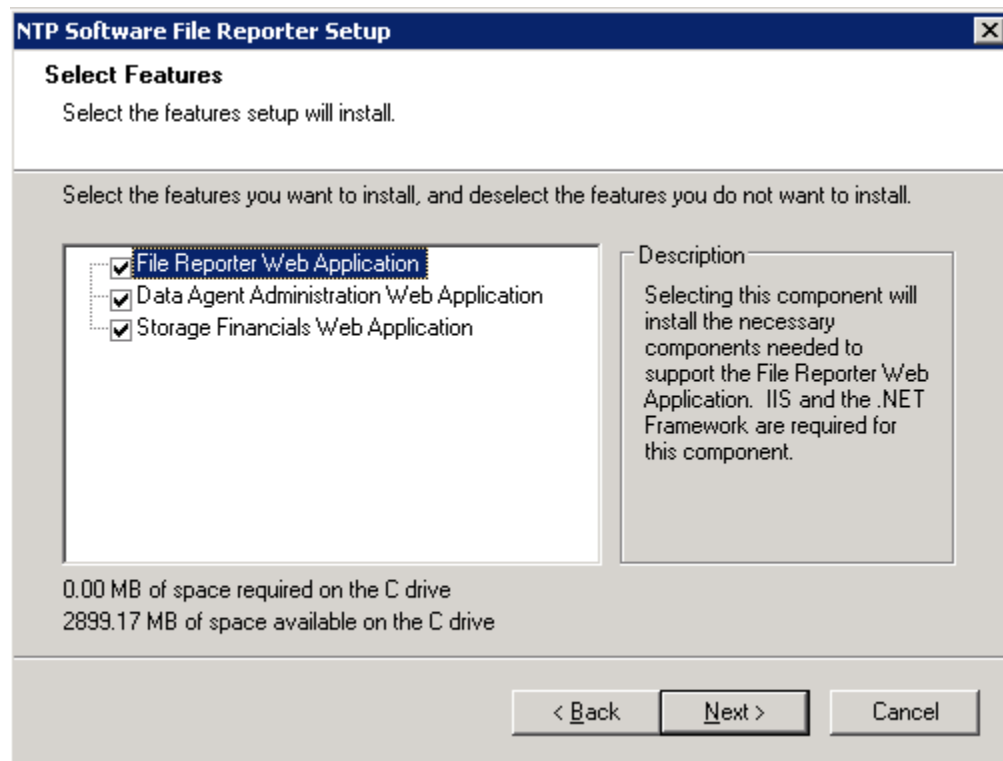
The dialog box is titled "NTP Software File Reporter Setup" and has a close button (X) in the top right corner. The main heading is "User Information" with the instruction "Enter your registration information." The NTP Software logo is in the top right. Below the heading, it says "Please enter the name 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 field for "Company Name" with the placeholder text "Company Name". Below this are two radio buttons: "Install Evaluation Version" (unselected) and "Install Production Version" (selected). Below the radio buttons is a text field for "Serial Number" with the placeholder text "SERIAL NUMBER". At the bottom left, it says "InstallShield". At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

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



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

8. In the **Select Features** dialog box, select either the **Vision Website** (used to display various reports) and/or the **Data Agent Administration Website** (used to configure the platform-related DefendX Software Data Collection Agent™) and/or the **Storage Financials Web Application** (used to display the Storage Financials™ module) to install. You can choose to install all features on the same machine. Click **Next**.



9. In the **Vision Reports – Web Site and Virtual Directory Aliases** dialog box, specify the name of the virtual directory and either select **Use Default Web Site** or select and specify the **Existing Web Site Name**. Click **Next**.

NTP Software File Reporter Setup

File Reporter Reports
Web Site and Virtual Directory Aliases

Please specify the name of the web site and virtual directory to gain access to the File Reporter Reporting Web Application.

Virtual Directory:

☒ Use Default Web Site

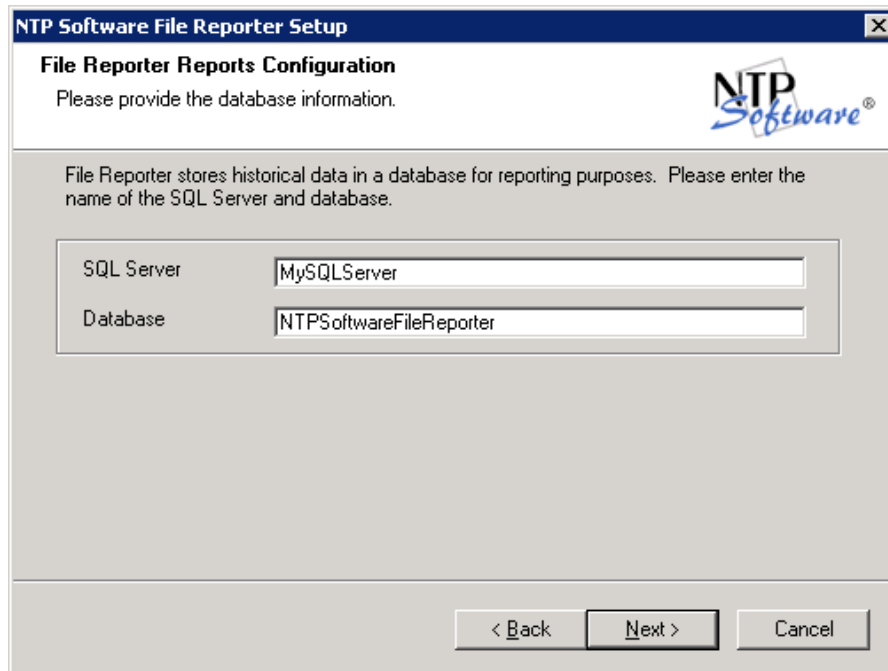
☐ Existing Web Site Name

Web Site:

InstallShield

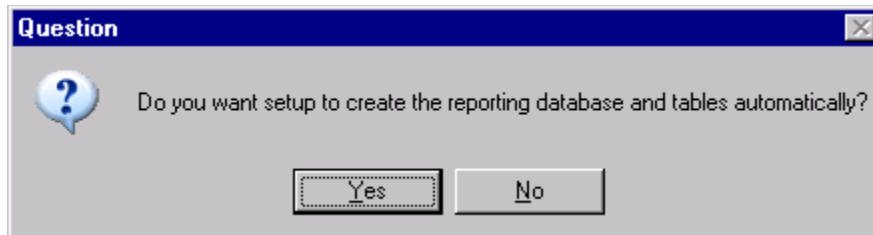
< Back Next > Cancel

10. In the **Database Information** dialog box, enter the name of the SQL server on which the database will be hosted and specify the name of the database to use. Click **Next**.



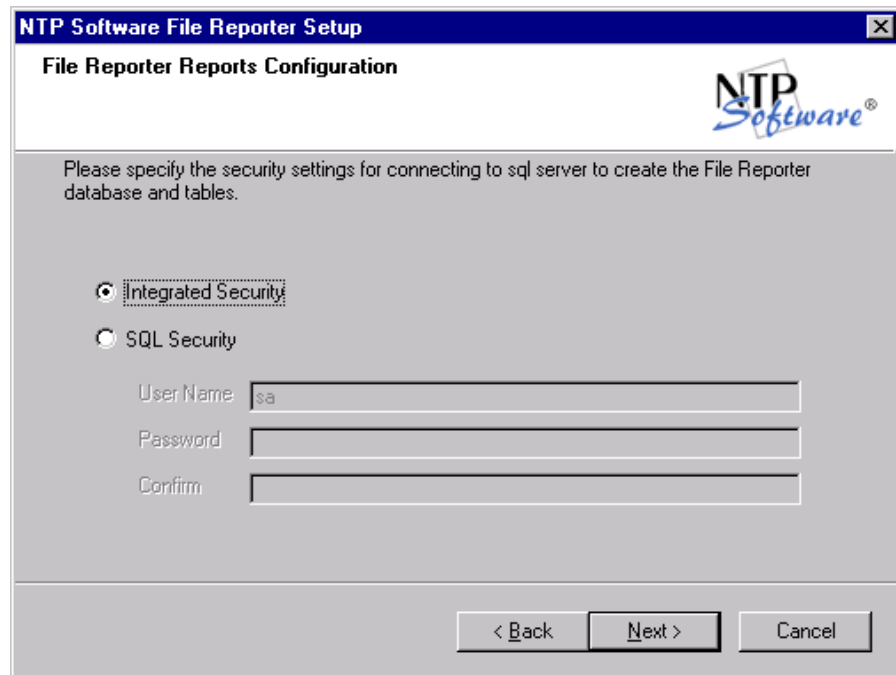
The dialog box is titled "NTP Software File Reporter Setup" and contains a sub-header "File Reporter Reports Configuration". Below the sub-header, it says "Please provide the database information." and includes the NTP Software logo. A descriptive text states: "File Reporter stores historical data in a database for reporting purposes. Please enter the name of the SQL Server and database." There are two input fields: "SQL Server" with the text "MySQLServer" and "Database" with the text "NTPSoftwareFileReporter". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

11. In the **Question** dialog box, you will be prompted to enable DefendX Software Vision setup to create the database and tables automatically. If you select **Yes**, the database and tables will be created in locations that you selected in the previous step. If you select **No**, the installation will be pointed to the previously created database.



The dialog box is titled "Question" and features a question mark icon. The text inside asks: "Do you want setup to create the reporting database and tables automatically?". At the bottom, there are two buttons: "Yes" and "No".

12. In the **SQL Security** dialog box, specify whether you want to use Windows® integrated security or SQL security for connecting to SQL Server and creating the database and tables. If you select SQL Security, enter the username and password for the account. Click **Next**.



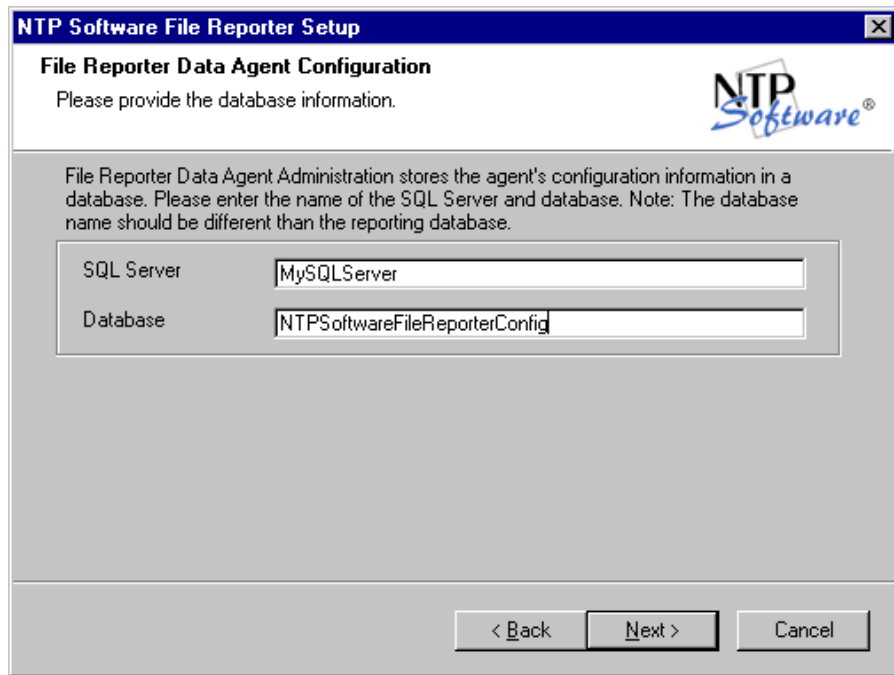
The image shows a Windows-style dialog box titled "NTP Software File Reporter Setup". The subtitle is "File Reporter Reports Configuration". In the top right corner, there is a logo for "NTP Software®". The main text area contains the instruction: "Please specify the security settings for connecting to sql server to create the File Reporter database and tables." Below this, there are two radio button options: "Integrated Security" (which is selected) and "SQL Security". Under the "SQL Security" option, there are three text input fields labeled "User Name", "Password", and "Confirm". The "User Name" field contains the text "sa". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

13. In the **Data Agent Administration – Web Site and Virtual Directory Aliases** dialog box, specify the name of the virtual directory and either select **Use Default Web Site** or select and specify the **Existing Web Site Name**. Click **Next**.

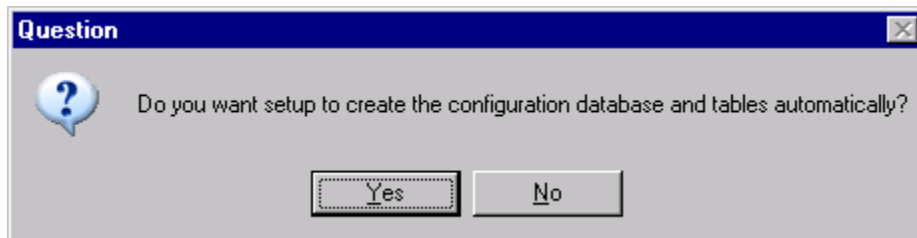
The screenshot shows a Windows-style dialog box titled "NTP Software File Reporter Setup". The subtitle is "Data Agent Administration" with the subtext "Web Site and Virtual Directory Aliases". The NTP Software logo is in the top right. The main text says: "Please specify the name of the web site and virtual directory to gain access to the File Reporter Data Agent Administration web application." Below this, there is a text box for "Virtual Directory" containing the text "DataAgentAdmin". There are two radio buttons: "Use Default Web Site" (which is selected) and "Existing Web Site Name". Below the "Existing Web Site Name" radio button is a text box for "Web Site". At the bottom left is the "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

14. In the **Database Information** dialog box, enter the name of the SQL server on which the database will be hosted and specify the name of the database to use. Click **Next**.

NOTE: If you chose to install the Administration Site only, the below screen will be different. You will be prompted in this case to specify the Vision Database details.




15. In the **Question** dialog box, you will be prompted to enable DefendX Software Vision setup to create the database and tables automatically. If you select **Yes**, the database and tables will be created in locations that you selected in the previous step. If you select **No**, the installation is pointed to the previously created database.



16. In the **SQL Security** dialog box, specify whether you want to use Windows® integrated security or SQL security for connecting to SQL Server and creating the database and tables. If you select **SQL Security**, enter the username and password for the account. Click **Next**.

NTP Software File Reporter Setup [X]

Data Agent Administration Configuration



Please specify the security settings for connecting to sql server to create the configuration database and tables.

☒ Integrated Security

☐ SQL Security

User Name:

Password:

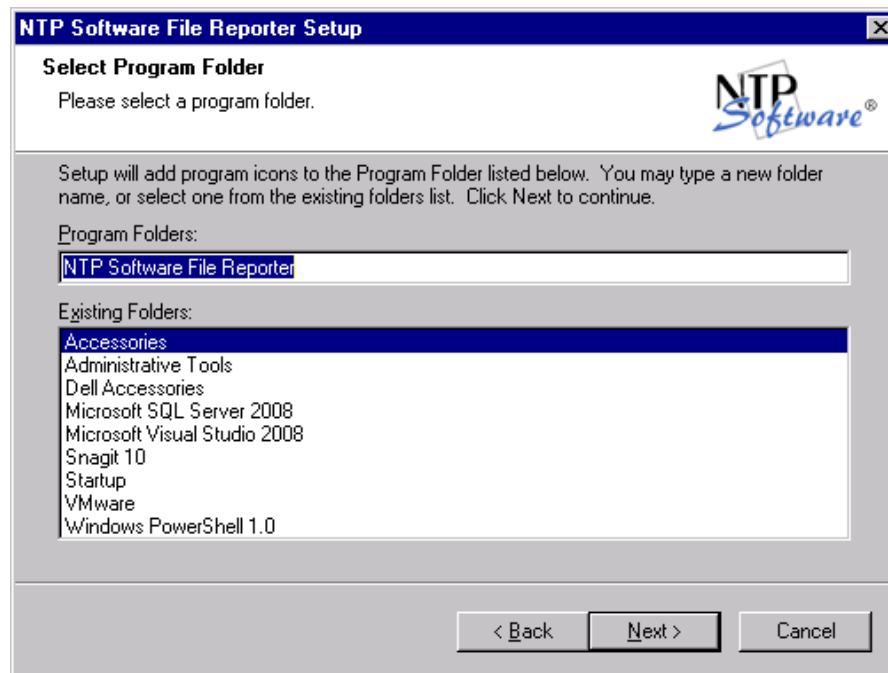
Confirm:

< Back Next > Cancel

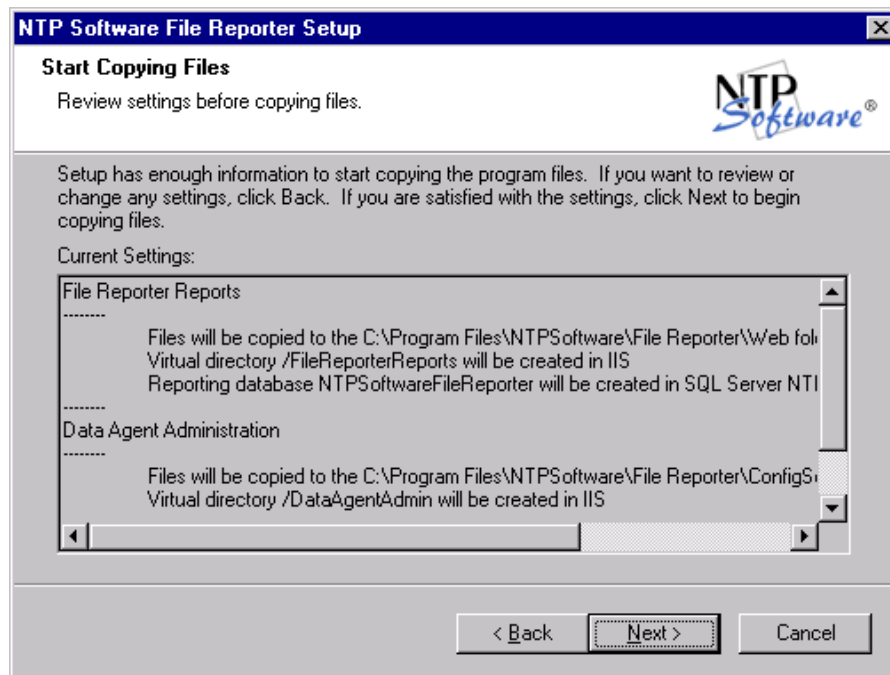
17. In the **Storage Financials– Web Site and Virtual Directory Aliases** dialog box, specify the name of the virtual directory and either select **Use Default Web Site** or select and specify the **Existing Web Site Name**. Click **Next**.

The screenshot shows a Windows-style dialog box titled "NTP Software File Reporter Setup". The "Storage Financials" tab is selected, with the subtitle "Web Site and Virtual Directory Aliases". The NTP Software logo is in the top right. The main text reads: "Please specify the name of the web site and virtual directory to gain access to the Storage Financials Web Application." Below this, there is a text box labeled "Virtual Directory" containing the text "StorageFinancials". There are two radio button options: "Use Default Web Site" (which is selected) and "Existing Web Site Name". Below the "Existing Web Site Name" option is a text box labeled "Web Site". At the bottom left, it says "InstallShield". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

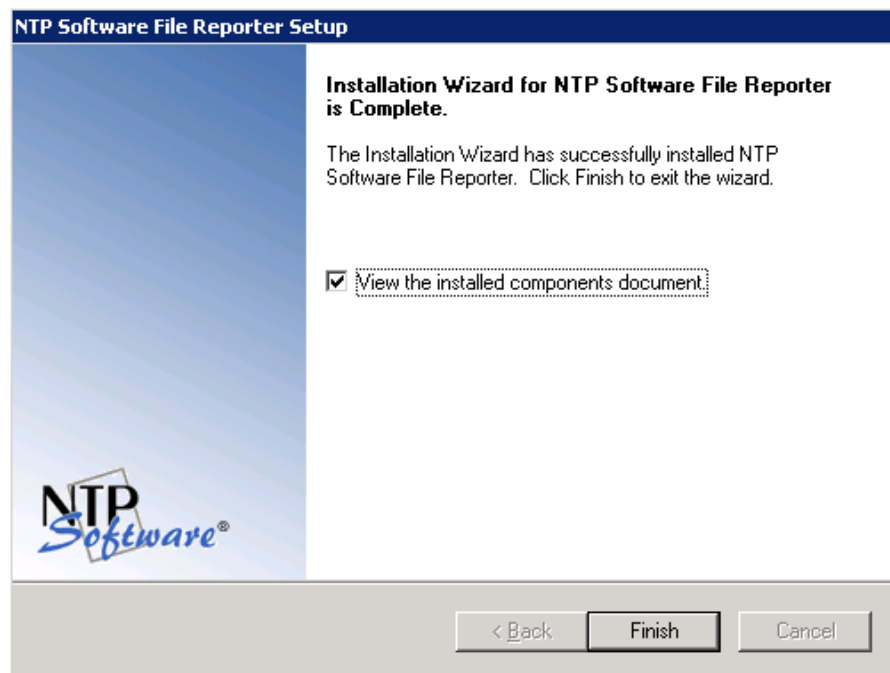
18. In the **Select Program Folder** dialog box, select the program folder to host the DefendX Software Vision startup group. Click **Next**.



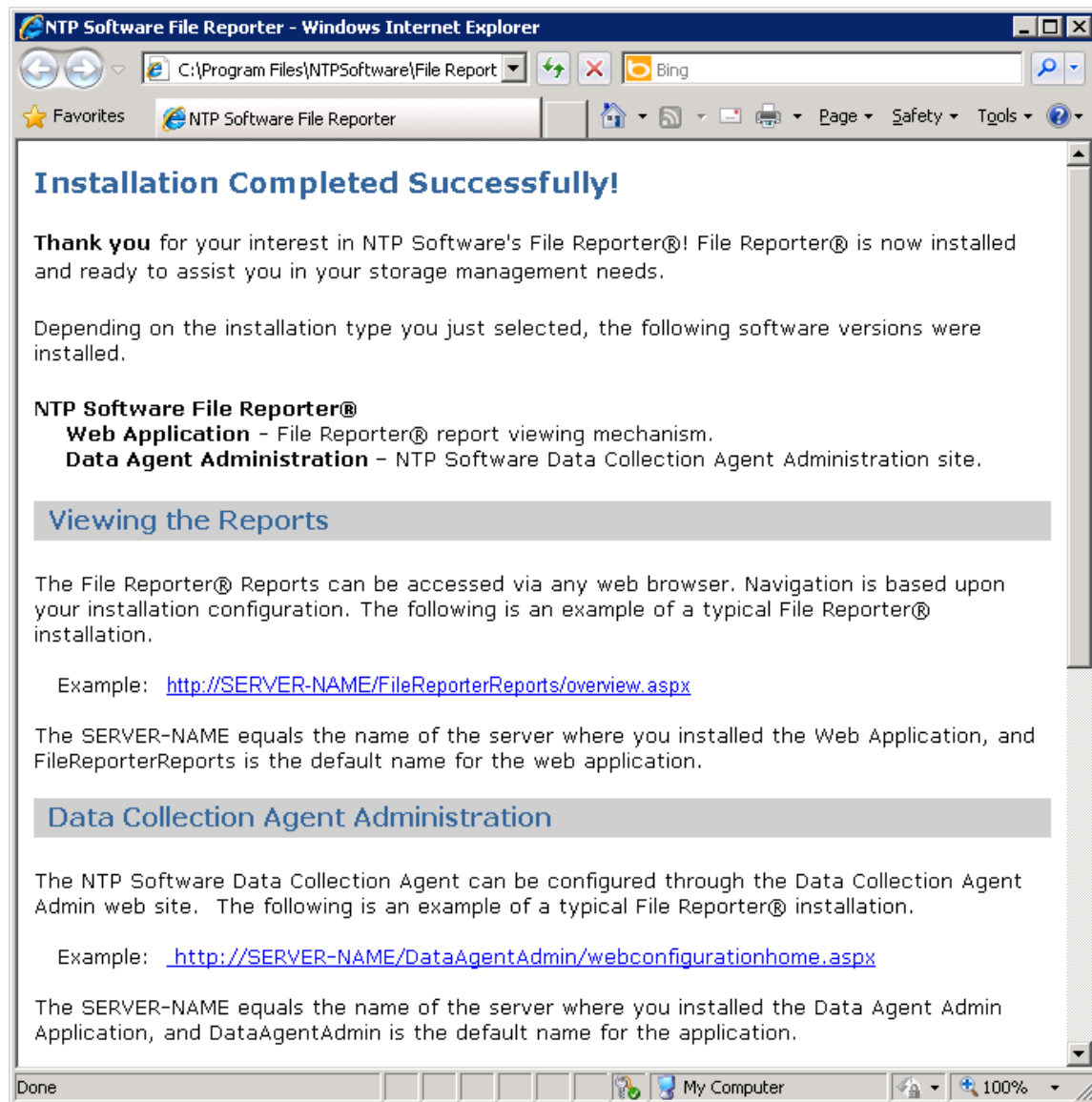
19. In the **Start Copying Files** dialog box, you will be prompted to click **Next** to begin copying the DefendX Software Vision program files to your computer. Review your web application configuration information in this window. Click **Back** to make any changes; otherwise, click **Next** to begin copying the files.



20. The Installation Wizard informs you when the components are installed successfully. If you want to view a list of installed components, select the **View the installed components document** checkbox. Click **Finish** to complete the installation.



21. Read the final report on completing the installation successfully.



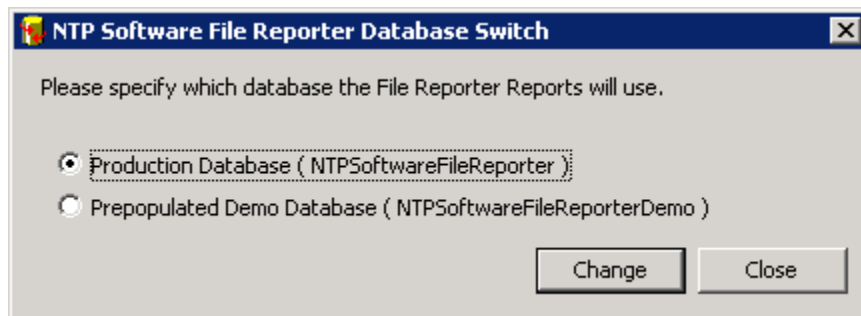
DefendX Software Vision Analysis Server Database Switch Utility

By default, when DefendX Software Vision is installed, the application is configured to view the demo database shipped with the product. The demo database enables you to view the reports available within the DefendX Software Vision application. After your initial scan is complete, you must switch the database view to view the data in your environment.

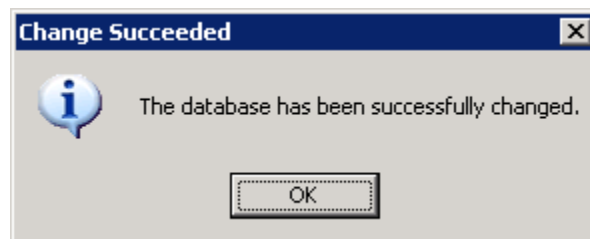
Switching Databases

NOTE: The DefendX Software Vision Report application should be closed prior to running this utility.

1. Click **Start > Programs > DefendX Software Vision > DefendX Software Vision Database Switch Utility**. This will open the utility for database switching.
2. Select the production database and click **Change**.



3. A confirmation dialog box will be displayed.



4. Click **Close** in the Database Switch utility and open DefendX Software Vision Reports; the data from your environment will be shown.

To return to the demo database at any point, follow these steps:

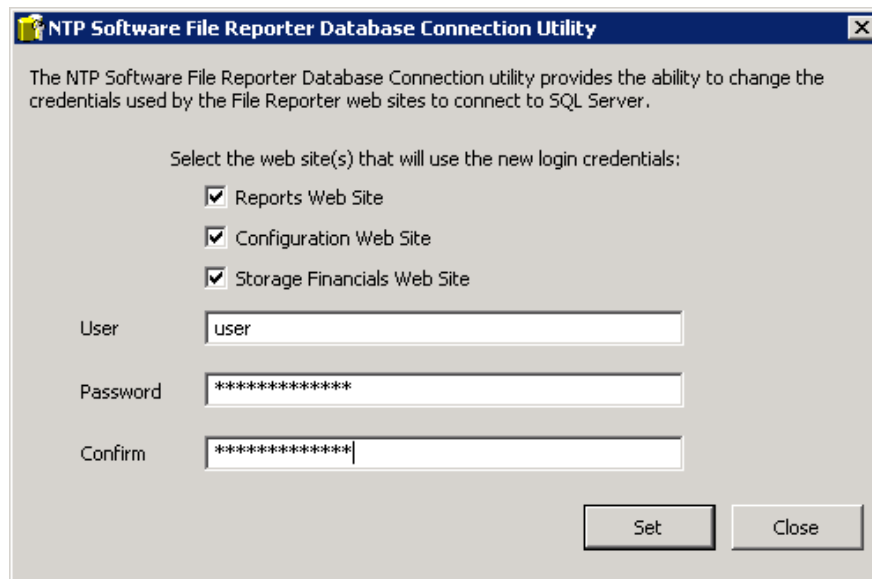
1. Click **Start > Programs > DefendX Software Vision > DefendX Software Vision Database Switch Utility**.
2. Select **Pre-populated Demo Database** and click **Change**.

DefendX Software Vision Analysis Server Database Connection Utility

DefendX Software Vision Database Connection Utility is designed to provide the ability to change the credentials used by the Vision websites to connect to the SQL Server database.

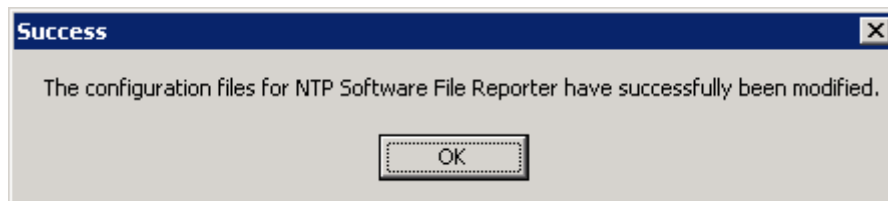
Changing Credentials

1. Click **Start > Programs > DefendX Software Vision > DefendX Software Vision DB Connection Utility**. This will open the utility for changing database credentials.
2. Select the Reports Web Site/Configuration Web Site/Storage Financials Web Site that will be using the new login credentials. Specify the user and the new password. Click **Set**.



The screenshot shows a Windows-style dialog box titled "NTP Software File Reporter Database Connection Utility". The text inside states: "The NTP Software File Reporter Database Connection utility provides the ability to change the credentials used by the File Reporter web sites to connect to SQL Server." Below this, it says "Select the web site(s) that will use the new login credentials:" followed by three checked checkboxes: "Reports Web Site", "Configuration Web Site", and "Storage Financials Web Site". There are three input fields: "User" with the text "user", "Password" with masked characters "*****", and "Confirm" with masked characters "*****". At the bottom right are two buttons: "Set" and "Close".

3. A confirmation dialog box will be displayed.



The screenshot shows a small confirmation dialog box titled "Success". The text inside says: "The configuration files for NTP Software File Reporter have successfully been modified." There is a single "OK" button at the bottom center.

4. Click **Close** in the Database Connection utility.

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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