DefendX Software Vision
Data Collection Agent™ for NetApp®
Installation Guide
Version 9.1

This guide provides quick instructions for the installation of DefendX Software Data Collection Agent™ for NAS, NetApp® Edition from an administrator's perspective. Upon completion of the steps within this document, DefendX Software Data Collection Agent for NAS, NetApp Edition will be installed within your enterprise community.

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Executive Summary

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

This document is a guide to the successful installation of DefendX Software Data Collection Agent for NAS, NetApp Edition. It will take you about 15 minutes to complete the installation steps provided here.

Before You Begin

The hardware required to support DefendX Software Data Collection Agent for NAS, NetApp Edition should be appropriate for the services running on the machine. For more specific hardware information, review the *Requirements* section of this document.

DefendX Software recommends using a single service account for installing DefendX Software Data Collection Agent for NAS, NetApp Edition. This account requires local administrator rights on each machine where DefendX Software Data Collection Agent for NAS, NetApp Edition is installed and on each Filer that the agent will scan, in addition to permission to write to the database.

Requirements

Hardware Specification

Each DefendX Software Data Collection Agent for NAS, NetApp Edition server must meet the following minimum requirements prior to installation:

- 2.2 GHz CPU

- 4 GB RAM

- 20 MB free disk space

Each agent requires 20 MB for installation files and additional disk space for scan caching. The amount of disk space required for scan caching scales depending on the amount of disk space that the agent is configured to scan. DefendX Software recommends reserving 1 GB of additional disk space for this scan caching.

Software Specification

Each agent server must be running:

- Windows Server® 2008, Windows Server® 2008 R2, Windows Server® 2012, or Windows® XP with administrator privileges.

NetApp Filer Requirements

The NetApp Filer to which DefendX Software Data Collection Agent for NAS, NetApp Edition will be scanning requires the following:

- Data ONTAP v6.5 or later (excluding versions 7.1.x). If Data Collection Agent is running on Windows Server 2008 or newer, it is recommended to upgrade to ONTAP version 7.3.3 or newer.

- DefendX Software Data Collection Agent for NAS, NetApp Edition requires the Cluster mode NetApp Filer to run Data ONTAP version 8.2 or later.
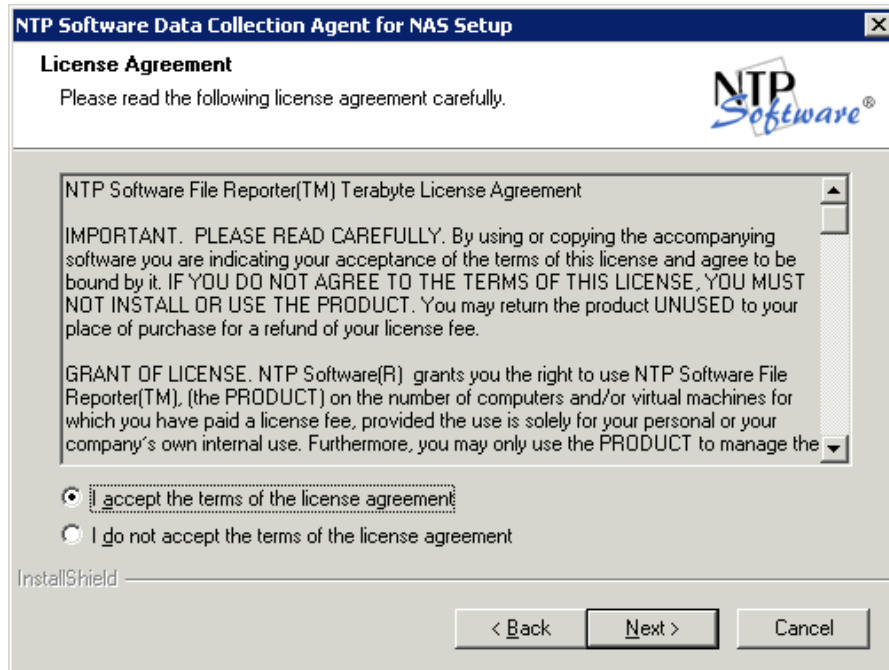
Installation

Prior to installing DefendX Software Data Collection Agent for NAS, NetApp Edition, DefendX Software recommends verifying that the installation server meets the requirements listed in the *Requirements* section of this document.

## Installing Data Collection Agent for NAS, NetApp Edition

1. Log on to your Windows Server 2008, Windows Server 2008 R2, or Windows XP machine using an account with administrator privileges.

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

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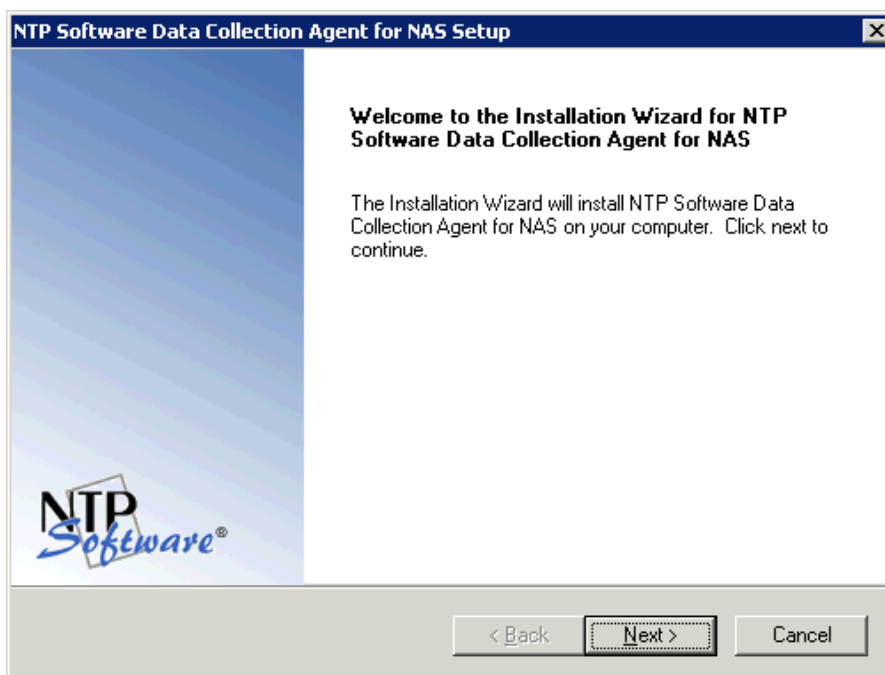
4. In the **License Agreement** dialog box, read the end-user license agreement. If you agree to the terms, select **I accept the terms of the license agreement** and then click **Next**. If you do not accept the terms, click **Cancel** to exit the installation.

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. Click **Next**.
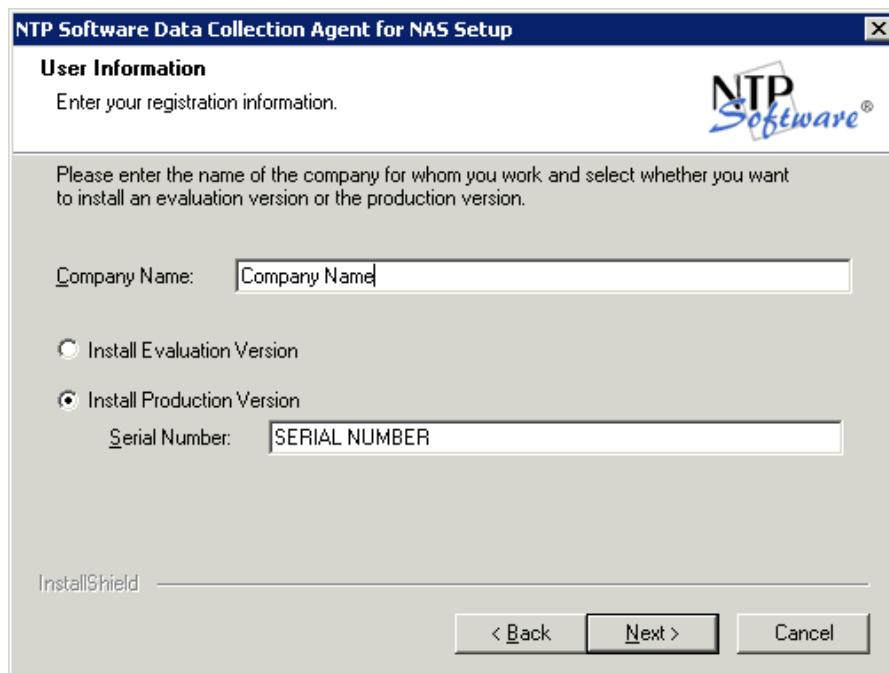
6. In the **Choose Destination Location** dialog box, specify the destination location for the installed software. Click **Next**.
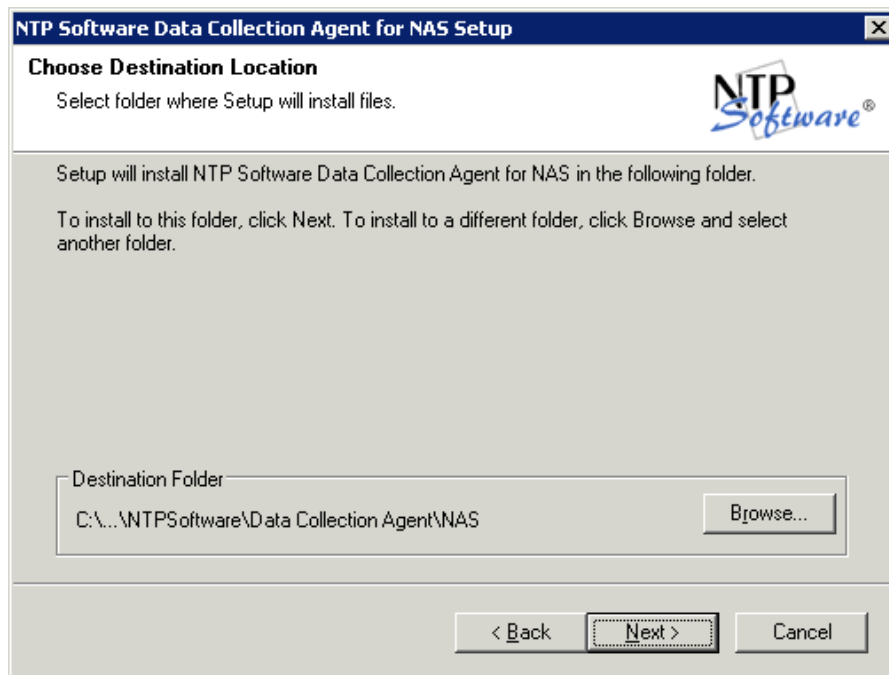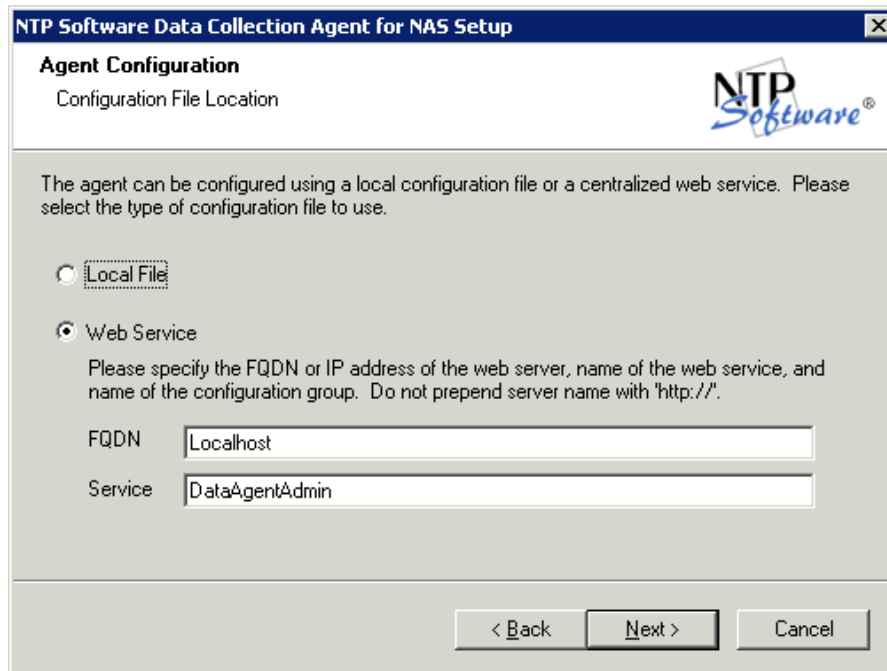
7. In the **Agent Configuration** dialog box, you will be prompted for a Windows domain user account to run the agent. Enter the username and password for a domain user account with the following:

   o Administrative rights on the Filer (for 7-Mode Filers only, not required for C-Mode Filers).

   o read/write privileges for the DefendX Software Data Collection Agent for NAS, NetApp Edition database.
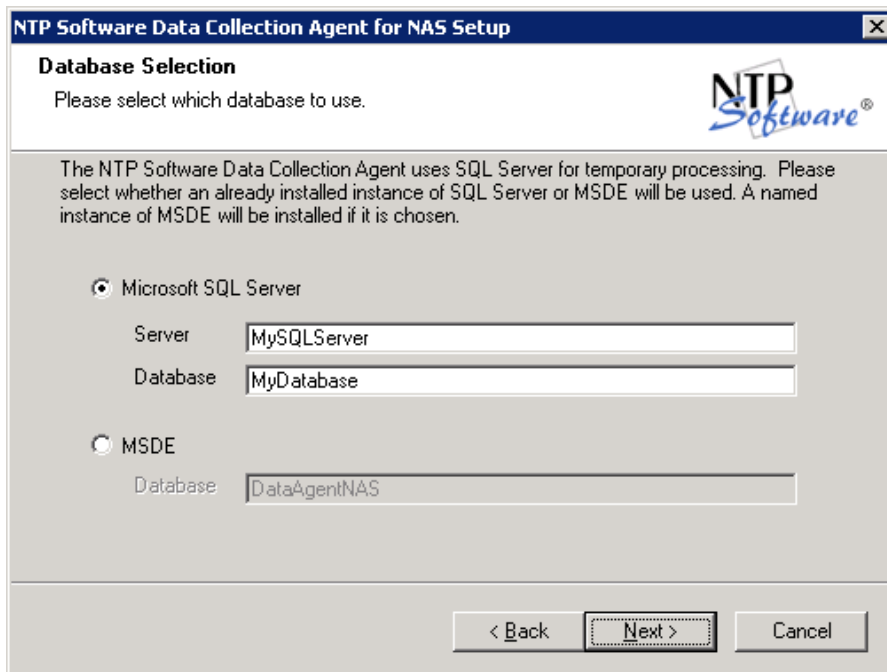
8. Click **Next**.

9. In the **Agent Configuration** dialog box, determine whether you will use a local or web location for the agent configuration file. If you select the **Web Service** option, enter the IP address or fully qualified domain name (FQDN) of the web server and the service (the default is DataAgentAdmin). Click **Next**.

> **NOTE:** If you selected the local file option, please make sure to add the configuration manually. Automatic scans and administration site configuration will not be available in case of local file selection.
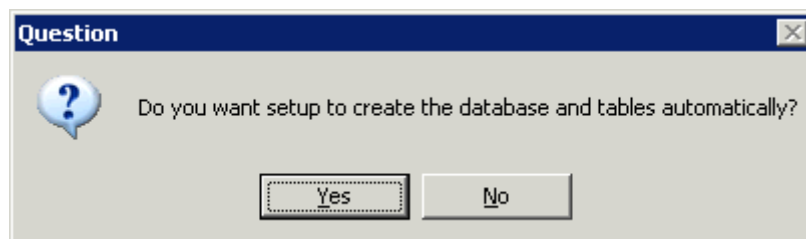
10. In the **Database Selection** dialog box, select which database to use. If you use **Microsoft SQL Server**, enter the server name and the database name. However, if you use **MSDE**, specify the database to be used. Click **Next**.

11. If you specified **Microsoft SQL Server** on the **Database Selection** dialog, the **Question** dialog box will follow. In the **Question** dialog box, you will be prompted to enable the software 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.

12. In the **SQL Security** dialog box, specify which security settings you want to use to connect to the SQL server. If you select **SQL Security**, enter the username and the password needed to connect to the SQL server. Click **Next**.

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

14. When copying files is finished, a final screen informs you that the installation is complete. If you want to view a list of installed components, select the **View the installed components document** checkbox. Click **Finish** to complete the process.
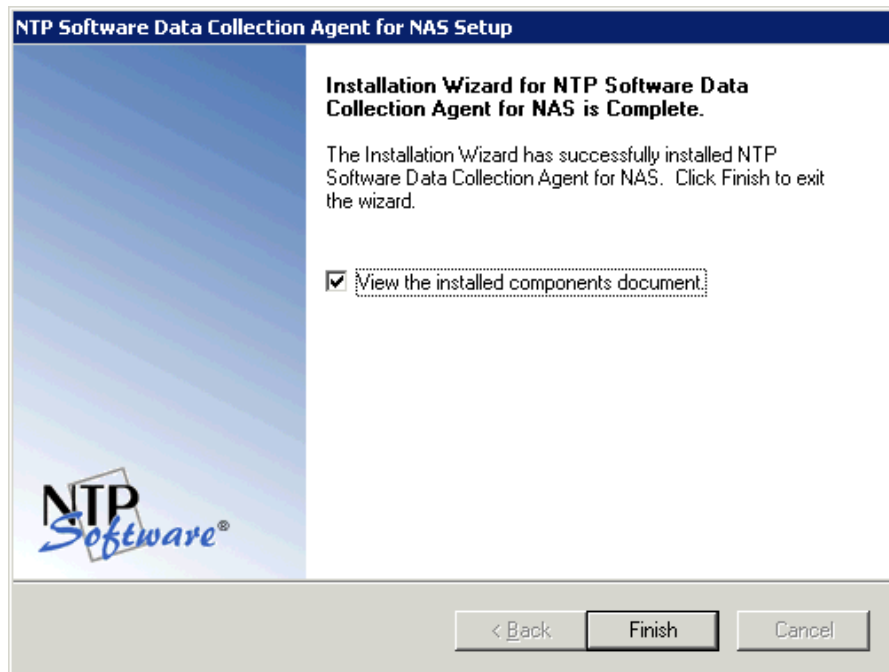
NOTE: Once you are done with the DefendX Software Data Collection Agent for NAS, NetApp Edition installation, you will need to create a corresponding configuration for the agent. For more details, please refer to the DefendX Software Vision™ User Manual.
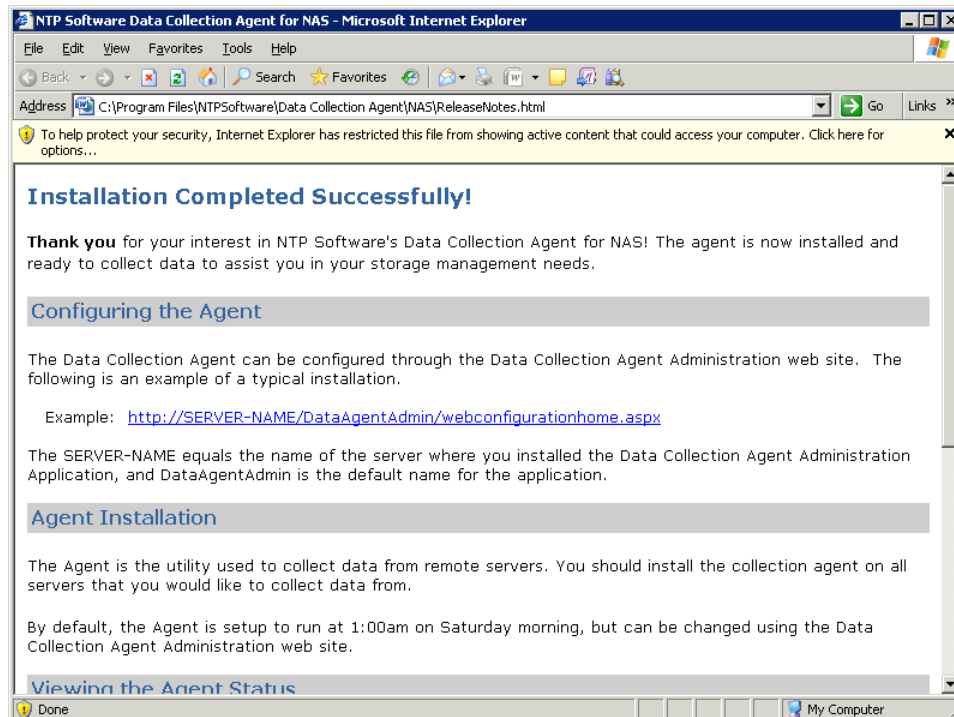
Prepare Netapp Filer for Data Collection Agent

Create a user for Data Collection Agent to use to scan C-Mode Filers

Create a local account on the cluster that has *admin* role for the *ontapi* application. Use the following command to create this user:

```
$ security login create -username DefendX_user -application  ontapi -authmethod password -role
admin
```

> **NOTE:** You will need this information when you add the Filer details in the Data Agent Administration website. For more details, please refer to the DefendX Software Vision™ User Manual.

Enabling DefendXSoftware_DCA fpolicy for 7-Mode Filers

Although DefendX Software Data Collection Agent For NAS, NetApp Edition does not install any components on the Filer, for Filers running ONTAP® versions lower than v7.0x, you will need to enable the DefendXSoftware_DCA fpolicy management service.

For Filers running ONTAP version 7.0 or later, the DefendXSoftware_DCA fpolicy will be created automatically. No further Filer administration is required.

> **NOTE:** Data ONTAP versions 7.0.6 and 7.2.2 contain a number of fixes that address stability and memory issues related to fpolicy functionality in Data ONTAP. NetApp strongly recommends that customers using fpolicy should move to one of these Data ONTAP versions or later.
>
> The Data ONTAP v7.1 release family is currently not supported with fpolicy.
>
> For more information please consult *NetApp Customer Support Bulletin CSB-0704-02: fpolicy Update for Data ONTAP*.

To enable the MASCAN fpolicy, follow these steps:

Log on to the Filer with an account that has administrative privileges (for example, root).

1. At the prompt, type the following text and then press **Enter**:

   ```
   fpolicy create DefendXSoftware_DCA screen
   ```

2. Type the following text and then press **Enter**:

   ```
   fpolicy enable DefendXSoftware_DCA
   ```

3. To verify that CIFS file policies are now enabled, type the following text and then press **Enter**:

   ```
   Fpolicy
   ```

These steps create the configuration that allows DefendX Software Data Collection Agent for NAS, NetApp Edition to register with and manage your Filer. This step must be completed before you try to configure DefendX Software Data Collection Agent for NAS, NetApp Edition.

Enabling FPolicy Support for Cluster-Mode Filers

Note: DefendX Software Data Collection Agent will create and enable fpolicy automatically for the managed CIFS Server on the cluster-mode Filer. However, the following section shows how to create and enable FPolicy manually.

Perform the following steps to enable the Cluster-Mode Data ONTAP fpolicy management service:

1. Log on to the NetApp server with an account that has administrative privileges.

2. At the prompt, enter the following commands:

   fpolicy policy event create -vserver *<vserver name>* -event-name **DefendXSoftware_DCA_EVT_CIFS** -protocol cifs
   fpolicy policy external-engine create -vserver *<vserver name>* -engine-name **DefendXSoftware_DCA_ENG** -primary-servers *<Preferred DCA machine IP address, dedicated for communication with the filer>* -port *<unused dynamic port number>* -extern-engine-type asynchronous -ssl-option no-auth
   fpolicy policy create -vserver *<vserver name>* -policy-name **DefendXSoftware_DCA** -events
   DefendXSoftware_DCA_EVT_CIFS -engine **DefendXSoftware_DCA_ENG** -is-mandatory false -allow-privileged-access yes -privileged-user-name *<Data Collection Agent domain user account, in the format NetBiosName\UserName>*
   fpolicy policy scope create -vserver *<vserver name>* -policy-name **DefendXSoftware_DCA** -shares-to-include "*" -volumes-to-include "*"
   fpolicy enable -vserver *<vserver name>* -policy-name **DefendXSoftware_DCA** -sequence-number *<unused sequence number>*

3. To verify that CIFS file policies are now enabled, enter the following command:

   fpolicy show -vserver *<vserver name>*

> **NOTES:**
> - Data Collection Agent will create and enable fpolicy automatically for the managed CIFS Server on the cluster-mode Filer using default sequence number **2**. Since sequence number cannot duplicate.
> - DCA will fail to enable fpolicy on cluster-mode Filer if the sequence number is used by another fpolicy on the same VServer.
> - DCA will create a registry value named "***<CifsServerName>*_FPolicySeqNum**" inside the connector registry key, with default value 2. If DCA failed to enable fpolicy due to a redundant sequence number, then the user can configure this registry value to any unused sequence number, and then restart the DCA.

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

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