

NTP Software QFS® for Windows®

Installation Guide

This Installation Guide applies to all Windows editions.

Abstract

This guide details the method for installing NTP Software QFS® for Windows® from an administrator's perspective. Upon completion of the steps within this document, NTP Software QFS® for Windows® will be installed within your enterprise community.

Revision 1.0 Feb 2009

The information contained in this document is believed to be accurate as of the date of publication. Because NTP Software® must constantly respond to changing market conditions, this document should not be interpreted as a commitment on the part of NTP Software®, and NTP Software® cannot guarantee the accuracy of any information presented after the date of publication.

This document is for informational purposes only. NTP SOFTWARE® MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT.

NTP Software®, NTP Software QFS® (Quota & File Sentinel), and NTP Software NTP Software Smart Policy Manager[™] are either registered trademarks or trademarks of NTP Software® in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

NTP Software®, 20A Northwest Blvd. #136, Nashua, NH 03063, USA

Contents

Introduction	1
Ahead in This Guide	1
Requirements	1
Hardware Requirements	1
Software Requirements	1
NTP Software QFS® for Windows® Installation	2
Installing NTP Software Smart Policy Manager™	2
Installing NTP Software QFS® for Windows®	10
Verifying Your Installation	17
About NTP Software®	18
NTP Software® Professional Services	18

.

Introduction

This document is a guide to successful installation and setup of NTP Software QFS® for Windows® in a timely and effective manner. It will take you about 30 minutes to complete the steps outlined here. Guided by this document, you will save hours in your initial work with QFS technology.

Ahead in This Guide

This guide walks you through a typical NTP Software QFS® for Windows® installation, including the following phase:

• Initial installation of NTP Software QFS® for Windows® on one server.

Requirements

This section highlights the main hardware and software requirements needed for a successful installation of NTP Software QFS® for Windows®.

Hardware Requirements

Your hardware should be appropriate for the services running on the machine. If the system is used only for file and print, NTP Software® recommends the following:

- Minimum CPU Intel 333 MHz
- 64MB RAM.
- 8MB disk space (needed to load the software)

Software Requirements

- Windows NT 4.0 (SP4 or later) or Windows 2000, Windows XP, or Windows 2003.
- Internet Explorer 4.0 (SP1 or later).

NTP Software QFS® for Windows® setup is integrated with Windows NT, Windows 2000, and Windows 2003 security, so you are not required to create the service account prior to installation. However, Windows requires that your primary domain controller (PDC) be online and available to create accounts. If you do not have access to your PDC, you must create all groups and accounts in advance.

NTP Software QFS® for Windows® Installation

Please refer to the *Requirements* section of this document before you start the installation process. NTP Software QFS® for Windows® installation is easy. If there are no other NTP Software Smart Policy Manager[™]–enabled products on your system, the first part of the QFS installation process involves installing NTP Software® Smart Policy Manager[™]. NTP Software Smart Policy Manager[™] provides the policy engine that drives NTP Software QFS® for Windows® and other Storage Resource Management (SRM) and systems-management products. If NTP Software Smart Policy Manager[™] is already installed on your machine; the setup automatically skips this step. If not, NTP Software Smart Policy Manager[™] installation takes only a few minutes. Once this process is complete, NTP Software QFS® for Windows® installation begins automatically. A few minutes later, your system is up and running (no need to reboot).

Installing NTP Software Smart Policy Manager™

- 1. Log on to your Windows NT or Windows 2000, XP, or 2003 computer, using an account with administrator privileges.
- 2. Place the NTP Software QFS® for Windows® CD into the server's CD-ROM drive. After a few moments, the installation start window appears.
 - **NOTE:** If the start window does not appear, it could mean that the CD auto run feature is disabled on your computer.
 - You can start the installation manually by launching Setup.exe from your CD-ROM drive.
 - If you downloaded an evaluation software to a location on your computer, go to the directory into which the file was downloaded (usually Temp) and double-click the NTP Software Smart Policy Manager[™].exe self-extracting zip file.
- 3. When prompted to install NTP Software Smart Policy Manager[™], click **Yes** to launch the Installation Wizard.

Question	
?	NTP Software Smart Policy Manager is not installed on your system. You need it to run this application. If you do not install Smart Policy Manager the setup will exit. Do you want to install Smart Policy Manager at this time?

- If NTP Software Smart Policy Manager[™] is already installed on your computer; skip to the section "*Installing NTP Software QFS® for Windows®*."
 - You can start the installation manually by launching Setup.exe from your CD-ROM drive.

4. On the NTP Software Smart Policy Manager[™] installation welcome dialog box, click **Next**.

NTP Software Smart Policy M	anager Setup Wizard	X
DE Contra de la co	Welcome to the NTP Software Installation Wizard for Smart Policy Manager The Installation Wizard will install Smart Policy Manager on your computer. Click next to continue.	
	< <u>B</u> ack <u>Next ></u> Cancel	
Γ		
IMPORTANT: The NTP policies across the comp hierarchy that matches the NTP Software Smart administration and provid Policy Manager™–enable	Software Smart Policy Manager™ engine distribut uters on your network. It allows you to create a pol e way you actually manage your network. Policy Manager™ supports secure delegat les a common user interface for NTP Software Sm ed applications.	tes icy ced art

5. Select I accept the terms of the license agreement in the License Agreement dialog box; then click Next.

P Software Smart Policy Manager Setu	up Wizard		>
icense Agreement Please read the following license agreemen	it carefully.	N	TP Software"
NTP Software Smart Policy Manager(TM) I By using or copying the accompanying soft	End-User License tware you are indica	ting your accepta	nce of the
GRANT OF LICENSE. NTP Software gran	the terms of this lice hase for a full refund its you the right to us	inse, please returr 1. se Smart Policy Mi	n the anager
("PRODUCT") on one computer, solely for addition to the specified quantity of copies, backup to the original. However, you may into the active memory of more computers time. In addition the PRODUCT is licensed	your or your compai , you may make one not cause the softwi- than the above-spec solely for the manage	ny's own internal u (1) additional cop are to execute or l cified quantity at a gement of local sti	use. In ny as a be loaded any one orage <u>–</u>
• Laccept the terms of the license agreen	nenț		
I do not accept the terms of the license callShield —	agreement		
	/ Back	Nevts	

6. In the **Choose Destination Location** dialog box, browse to the needed location; then click **Next**.

Software Smart Policy Manager Setup V	Nizard		2
hoose Destination Location Select folder where setup will install files.			Sectionare"
Setup will install NTP Software Smart Policy Ma	anager in the fo	ollowing folde	r.
To install to this folder, click Next. To install to a another folder.	a different folde	er, click Brow	se and select
Destination Folder			

7. Make sure that the NTP Software Smart Policy Manager[™] Service and NTP Software Smart Policy Manager[™] Admin components are selected in the Select Features dialog box. Click Next.

NTP Software Smart Policy Manager Setup Wizard	X
Select Features Select the features setup will install.	Stetware"
Select the features you want to install, and deselect th	e features you do not want to install. Description Selecting this option will install all of the components required for the Smart Policy Manager service. The service installation will automatically install the client components.
4.46 MB of space required on the C drive 7993.84 MB of space available on the C drive InstallShield	<u>3</u> ack <u>N</u> ext > Cancel

IMPORTANT: After NTP Software QFS® is set up on your network, you can install NTP Software Smart Policy Manager[™] and the QFS Admin application on your workstation to administer the systems in your environment remotely.

- 8. In the Service Account dialog box, you are requested to specify the account under which the NTP Software Smart Policy Manager[™] service should run. The setup automatically defaults to the ID under which you are currently logged on. The account you use here as the Service Account must have administrator privileges, including the right to log on as a service. Enter or accept the account ID and click Next.
 - **NOTE:** If you specify a service account other than the ID under which you are currently logged on, you may receive a prompt asking whether you want to grant rights to that account. You must answer with **Yes** for the setup to configure your chosen account correctly.

ITP Software	Smart Policy Manager Setup Wizard	×
Service Ac	ount:	Stware"
Enter the se	rvice account the Smart Policy Manager servi	ce is to run under.
Service	Admin	
Password:	•••••	
Confirm:	•••••	
stallShield —		
	<u> </u>	k <u>N</u> ext> Cancel

9. In the **Smart Policy Manager Database Location** dialog box, specify the location for the NTP Software Smart Policy Manager[™] database. Click **Next** if the default location is appropriate. (We recommend accepting the default destination folder.)

Smart Policy Manager Database Location	Software
Setup will install the Smart Policy Manager database in the following fol	der.
To install to this folder, click Next. To install to a different folder, click Br another folder.	owse and select
Destination Folder	
Destination Folder C:\Program Files\Smart Policy Manager\data store	B <u>r</u> owse
Destination Folder C:\Program Files\Smart Policy Manager\data store allShield	Biowse
Destination Folder C:\Program Files\Smart Policy Manager\data store allShield	B <u>r</u> owse

10. From the Setup Type dialog box, select First time installation in the enterprise and click Next.

NTP Software Smart Policy Manager Setup	Wizard		×
Setup Type Select the setup type that best suits your need	8.	ŗ	Software"
Choose the type of Smart Policy Manager insta	llation you are d	oing.	
• First time installation in the enterprise			
C Adding to an enterprise installation			
InstallShield	< <u>B</u> ack	<u>N</u> ext >	Cancel

IMPORTANT: NTP Software Smart Policy Manager[™] is the glue that holds your systems together and applies policies across machines. A first-time installation creates a new NTP Software Smart Policy Manager[™] management hierarchy.

After installation on the first machine, you join an existing hierarchy, and the newly joined systems will automatically inherit their configuration. There is no easier way to install and configure a new system or application.

- 11. In the NTP Software Smart Policy Manager Initial Setup Parameters dialog box specify the Organization and Location names you want. This dialog box appears in an initial installation of NTP Software Smart Policy Manager™. Click Next.
 - **NOTE:** In this example, you are creating SRM policies for a company named **Galactic Getaways**. The Location to which these policies will apply is **Global Network**. Do not worry about your choice of names; they can be easily changed later.

NTP Software Smart P	olicy Manager Setup Wizard	×
Smart Policy Manag	jer Initial Setup Parameters	Steware"
Enter the initial organi	zation and location names.	1
- · ·	Calcolia Catowaya	
Urganization:	Julaiactic detaways	
	Clabal Mahurah	
Location:	Jaiobai Nelwork	
In stall Claim Inf		
Instalioniela		
	<u> </u>	Next> Cancel

- 12. The **Start Copying Files** dialog box prompts you to begin copying files. Make sure that the settings are appropriate. If you need to change something, click **Back**. When the settings are correct, click **Next**.
 - **NOTE:** As files are copied, the NTP Software Smart Policy Manager[™] Setup Status dialog box appears and shows you the percentage complete for the NTP Software Smart Policy Manager[™] installation process. This process can take several minutes.

tart Copying Files		NITO
Review settings before copying files.		Software
Setup has enough information to start cop change any settings, click Back. If you a copying files.	pying the program files. If y are satisfied with the setting	ou want to review or Is, click Next to begin
Current Settings:		
Destination Path: C:\Program Files\Smart Policy Manager Smart Policy Manager database directory C:\Program Files\Smart Policy Manager Components to install: Smart Policy Manager Service	ger y: ger\data store	
Smart Policy Manager Administration	Tool	•
1		
alShield		

13. When the files installation is complete, a dialog box offers you the opportunity to view the readme file, which may contain documentation updates and other items. If you *do not* want to view the readme file at this time, clear the option **Yes**, **I want to view the readme file**. Click **Finish**.



Now as you have completed the installation of NTP Software Smart Policy Manager[™], the Setup Wizard automatically begins installing NTP Software QFS® for Windows®. The next section leads you through this process.

Installing NTP Software QFS® for Windows®

To install NTP Software QFS® for Windows®, you need an ID with administrator rights. NTP Software QFS® for Windows® needs a similar account to run under as a service. You can use the account from which you install or use a different account.

NTP Software QFS® for Windows® does not require a server reboot after installation. Our advanced File System Filter technology can install from a central console throughout your enterprise without requiring a reboot of any of your servers or workstations.

To install NTP Software QFS® for Windows®, do the following:

1. After the NTP Software Smart Policy Manager[™] installation is completed; NTP Software QFS[®] installation welcome dialog box appears pops up. Click **Next** to continue.



2. In the License Agreement dialog box, select I accept the terms of the license agreement then click Next.

P Software QFS® Setup			×
License Agreement Please read the following license agreemen	t carefully.	Ņ	Software®
NTP Software QFS (tm) for SAN, Windows End User License	Host		-
By using or copying the accompanying soft terms of this license. If you do not agree to the terms of this licen your place of purchase for a full refund. GRANT OF LICENSE. NTP Software gran PRODUCT'') on the number of computers and/or virtual machines for which use is solely for your personal or	tware you are indical nse, please return the ts you the right to us ch you have paid a li	ting your accept e product UNOF e NTP Software cense fee, provi	ance of the "ENED to QFS ("the ded the
I accept the terms of the license agreen	nent		
$\mathbb C$ I do not accept the terms of the license	agreement		
tallShield			
	(Pack	Mouth	

3. In the **Choose Destination Location** dialog box, browse to the desired destination or click **Next** if the default destination location is appropriate.

NTP Software QFS® Setup	×
Choose Destination Location Select folder where setup will install files.	Software
Setup will install NTP Software QFS® in the following folder.	
To install to this folder, click Next. To install to a different fol another folder.	der, click Browse and select
Destination Folder	
C:\Program Files\NTPSoftware\NTP Software QFS	Browse
InstallShield	
< Back	Next > Cancel

4. In the **Select Features** dialog box, make sure that the **Admin** and **Service** components are selected; then click **Next**.

elect Features	N	TD	
Select the features setup will install.	13	Softwar	
Select the features you want to install, and	d deselect the features you do not want	to install.	
Service Admin	Description		
Service	Selecting this option all of the componen to run the NTP Soft administrative client, choose not to install components you ma the NTP Software G service, but you will able to configure it f machine.	Selecting this option will install all of the components required to run the NTP Software QFS administrative client. If you choose not to install these components you may still install the NTP Software QFS service, but you will not be able to configure it from this machine.	
12.54 MB of space required on the C drive 7968.55 MB of space available on the C drive allShield	e drive		
	< Back Next >	Cancel	
	and a convert at this point your	hood both	

5. In the User Information dialog box, you are prompted to enter the NTP Software QFS® for Windows® product serial number that appears on your NTP Software QFS® for Windows® product registration card.

NOTE: If you enter alphabetical characters in lowercase, they are automatically converted to uppercase as you type.

P Software QFS Se	etup			×
User Information Enter your registrati	on information.		NT	
			200	tware
Please enter the national to install an evaluat	me of the company for wi	hom you work and s tion version	elect whether you war	nt
to install an evalua	ion version of the produc-	don version.		
Company Name:	Galactic Getaways			
C Install Evaluation	on Version			
 Install Production 	on Version			
<u>S</u> erial Numbe	er: LICENSE KEY			
InstallShield ———				
		< <u>B</u> ack	<u>N</u> ext >	Cancel

6. In the **Account Type** dialog box, select **Specify an account to use**. The Setup Wizard asks whether you want to specify an account to use or use the built-in system account. for this setup.

NTP Software QFS® Setup		×
Account Type Please specify the type of account to use.		Software*
The Quota & File Sentinel service can run as account. Specify an account to use Use the built-in system account. The follo The ability to specify UNC pat Active Directory/LDAP email User account lookups across	a specified account or the bu wing features are disabled: ths in policies. address lookups. multiple domains.	uilt-in system
InstallShield	< <u>B</u> ack <u>N</u> ext :	> Cancel

7. The **Service Account** dialog box appears, prompting you to specify an account ID under which the QFS service account will run. Use the same account you used for the NTP Software Smart Policy Manager™ Service (preferred), or specify another and click **Next**.

NTP Software QFS®	etup X
Service Account	Software
Enter the Service a	count NTP Software QFS® is to run under.
Service Account	Administrator
Password:	*******
Confirm:	********
InstallShield ———	
	< <u>B</u> ack <u>N</u> ext> Cancel
IMPORTANT : The job. The setup pro	e QFS service requires special rights to enable QFS to do its cess adds these rights automatically.

8. Specify the program folder (using the default program folder is recommended) and click **Next**. The setup program adds program icons to the program folder.

NTP Software QFS® Setup	×
Select Program Folder	NITO
Please select a program folder.	Software
Setup will add program icons to the P name, or select one from the existing	rogram Folder listed below. You may type a new folder folders list. Click Next to continue.
Program Folder:	
NTP Software QFS	
Existing Folders:	
Accessories Administrative Tools APSC Games Google Talk InterVideo WinDVD iTunes Java Web Start Microsoft Office	
InstallShield	
	< Back Next > Cancel
IMPORTANT : By default, NTP program group for all your NT applications.	Software Smart Policy Manager™ creates a P Software Smart Policy Manager™–enabled

9. Click **Next** when the **Start Copying Files** dialog box appears (assuming that the destination paths are correct). NTP Software QFS® setup begins transferring files to the specified locations.

P Software QFS® Setup		
Start Copying Files Review settings before copying files.		Sectionare*
Setup has enough information to start cop change any settings, click Back. If you a copying files.	oying the program files. If y re satisfied with the setting	ou want to review or s, click Next to begin
Current Settings:		
C:\Program Files\NTPSoftware\NTP Components to install: NTP Software QFS Service NTP Software QFS Administration To Start Menu Folder: NTP Software QFS	' Software QFS ool	▲
aligbiald		
dioticid.		

10. When the files installation is complete, a dialog box offers you the opportunity to view the readme file. If you *do not* want to view the readme file at this time, clear the option **Yes**, **I** want to view the readme file. Click **Finish**. By this step NTP Software QFS® installation is completed.



Verifying Your Installation

At this point, your system should have both the NTP Software Smart Policy Manager™ service and the NTP Software QFS® for Windows® service installed and running. Setup will have started both services automatically.

You can verify that both services are running by looking at the Windows Service Manager. Click the Windows Start button and choose All Programs > Control Panel > Administrative Tools > Services.

About NTP Software®

NTP Software® is the worldwide leader in user-focused, policy-based storage management. We create platform-independent products that enable companies to automatically control the compliance, access, quotas, content, and lifespan of their users' stored files. NTP Software® solutions also gather the analysis and planning data necessary for both short- and long-term decision making, providing everything necessary to actively control all aspects of a user's relationship with local and shared storage.

NTP Software® Professional Services

For further assistance with NTP Software QFS® or in creating a corporate storage management policy, contact your NTP Software® representative at 800-226-2755 or 603-622-4400.

NTP Software® Professional Services offers training and consulting services in support of the deployment and configuration of your storage resource management software.

NTP Software® 20A Northwest Blvd. #136 Nashua, NH 03063-4066 Toll-free: 800-226-2755 International: 1-603-622-4400 Website: www.ntpsoftware.com