



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.

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NTP Software QFS® Windows Version Installation Guide

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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

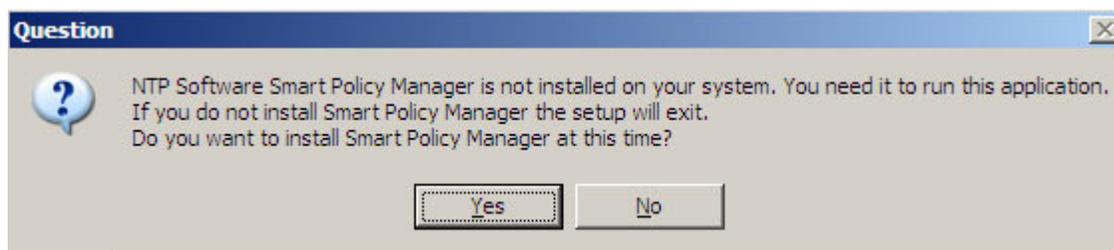
Please refer to the *Requirements* section of this document before you start the installation process. NTP Software QFS® for Windows® installation is easy. If there are no other NTP Software Smart Policy Manager™-enabled products on your system, the first part of the QFS installation process involves 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.

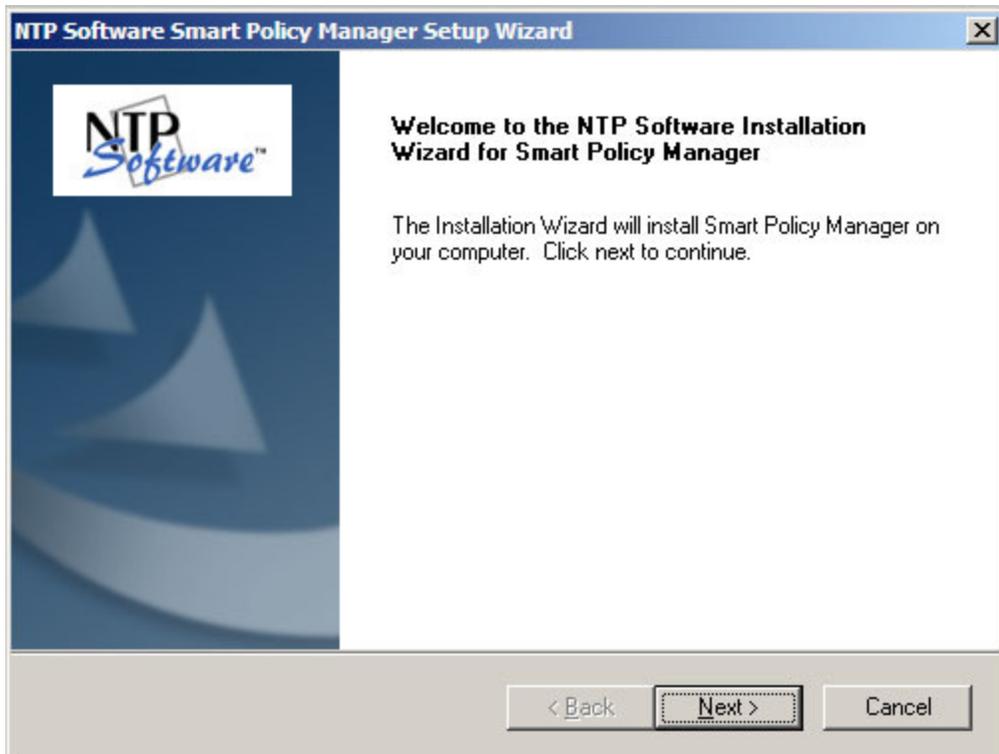
- NOTE:**
- If the start window does not appear, it could mean that the CD auto run feature is disabled on your computer.
 - You can start the installation manually by launching Setup.exe from your CD-ROM drive.
 - If you downloaded an evaluation software to a location on your computer, go to the directory 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.



- NOTE:**
- 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**.

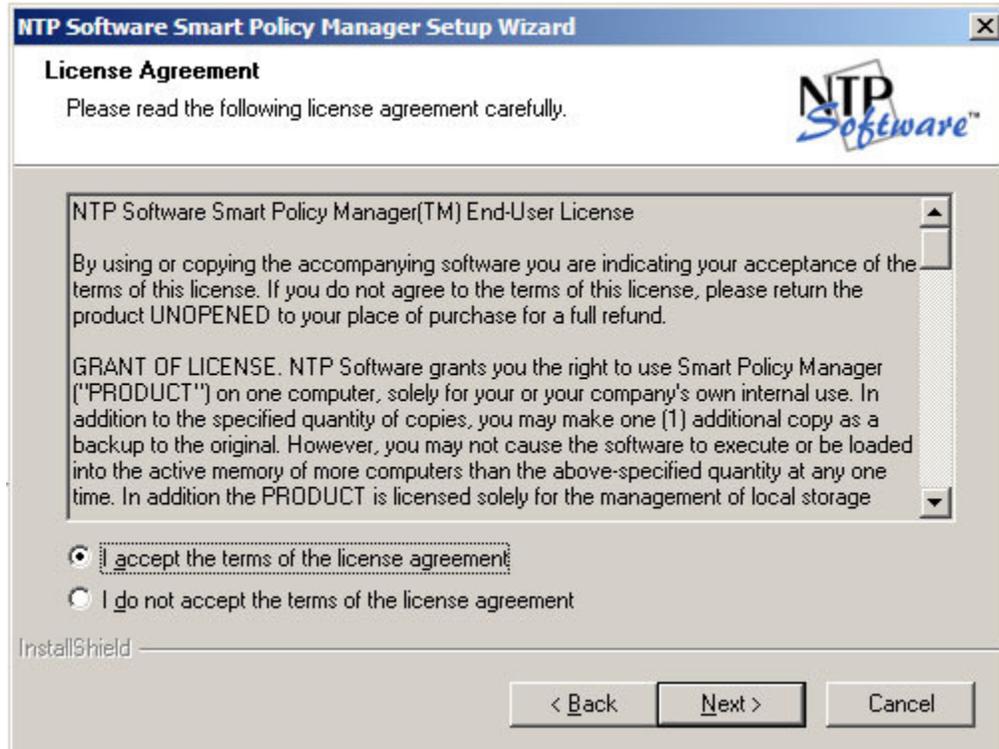


IMPORTANT: The NTP Software Smart Policy Manager™ engine distributes policies across the computers on your network. It allows you to create a policy hierarchy that matches the way you actually manage your network.

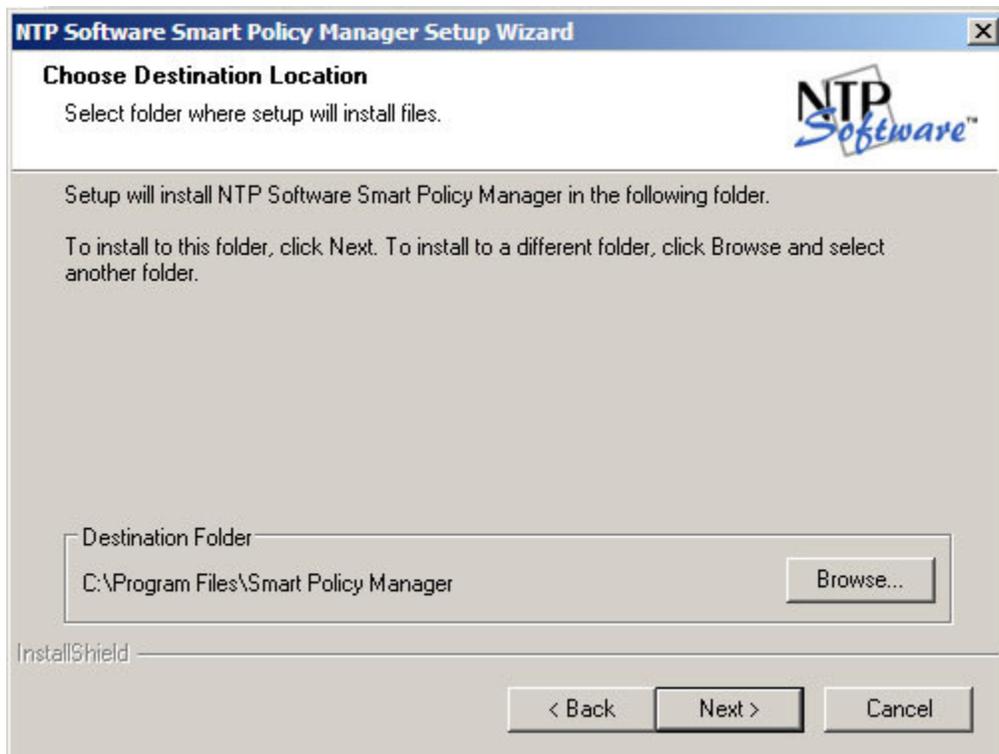
NTP Software Smart Policy Manager™ supports secure delegated administration and provides a common user interface for NTP Software Smart Policy Manager™-enabled applications.

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

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



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**.



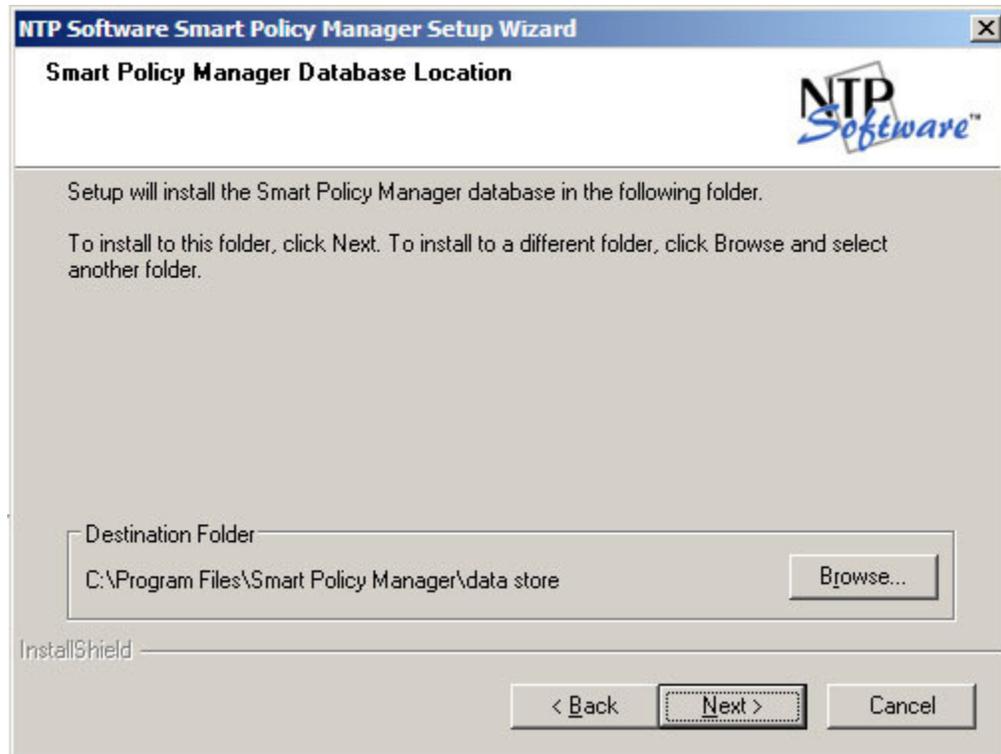
IMPORTANT: After NTP Software QFS® is set up on your network, you can install NTP Software Smart Policy Manager™ and the QFS Admin application on your workstation to administer the systems in your environment remotely.

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**.

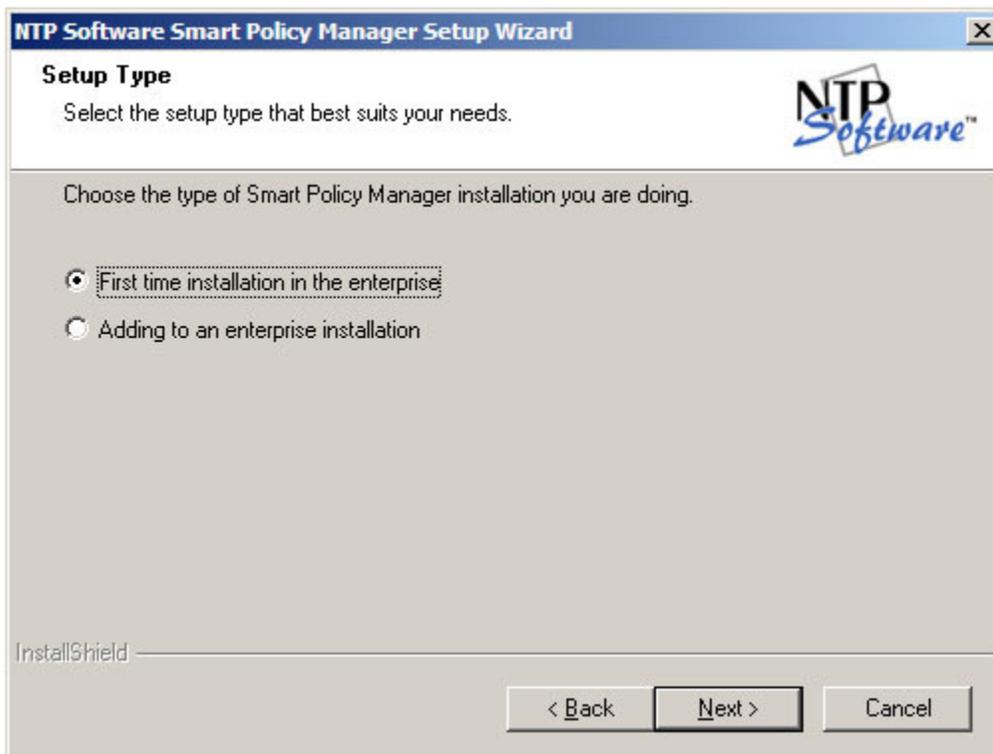
NOTE: If you specify a service account other than the ID under which you are currently logged on, you may receive a prompt asking whether you want to grant rights to that account. You must answer with **Yes** for the setup to configure your chosen account correctly.



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.)



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



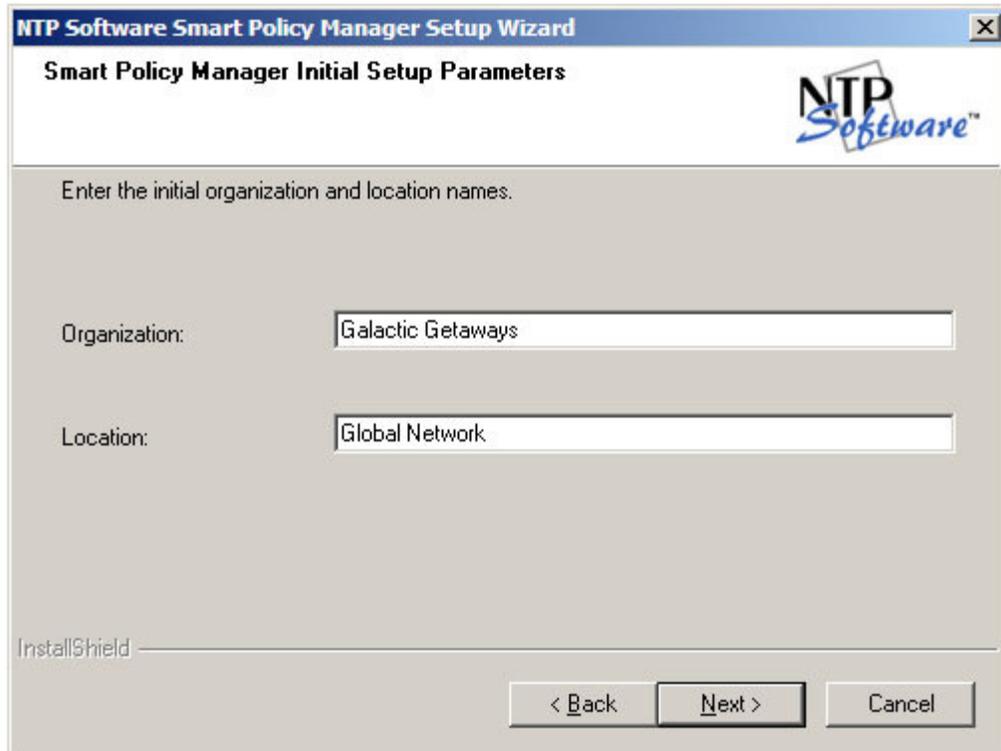
IMPORTANT: NTP Software Smart Policy Manager™ is the glue that holds your systems together and applies policies across machines. A first-time installation creates a new NTP Software Smart Policy Manager™ management hierarchy.

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:

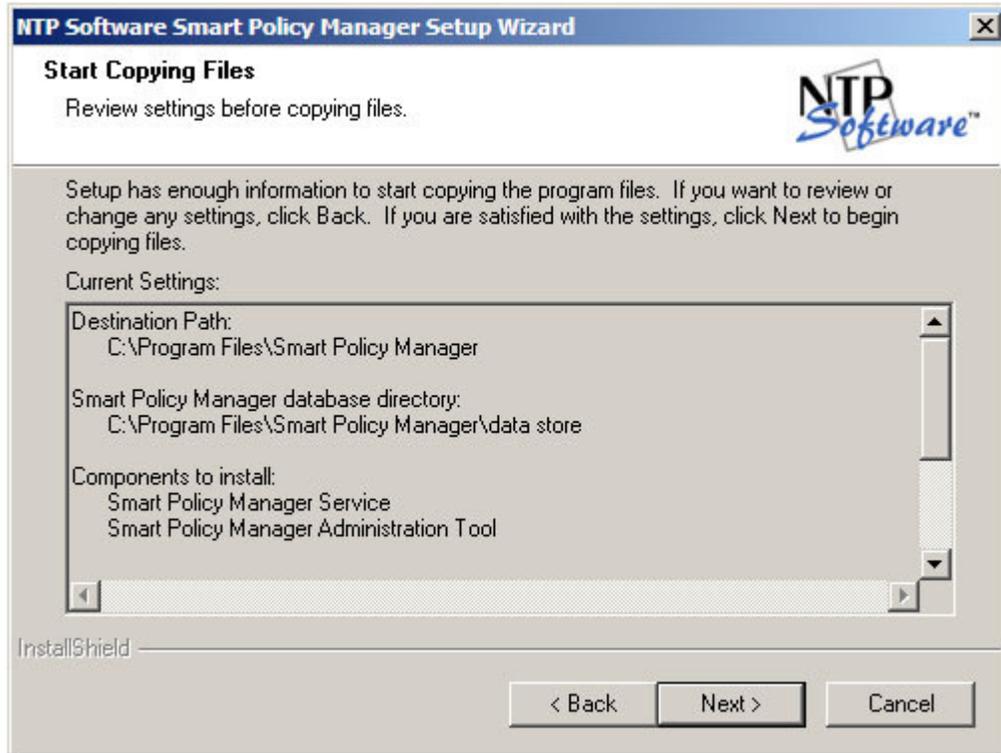
In this example, you are creating SRM policies for a company named **Galactic Getaways**. The Location to which these policies will apply is **Global Network**. Do not worry about your choice of names; they can be easily changed later.



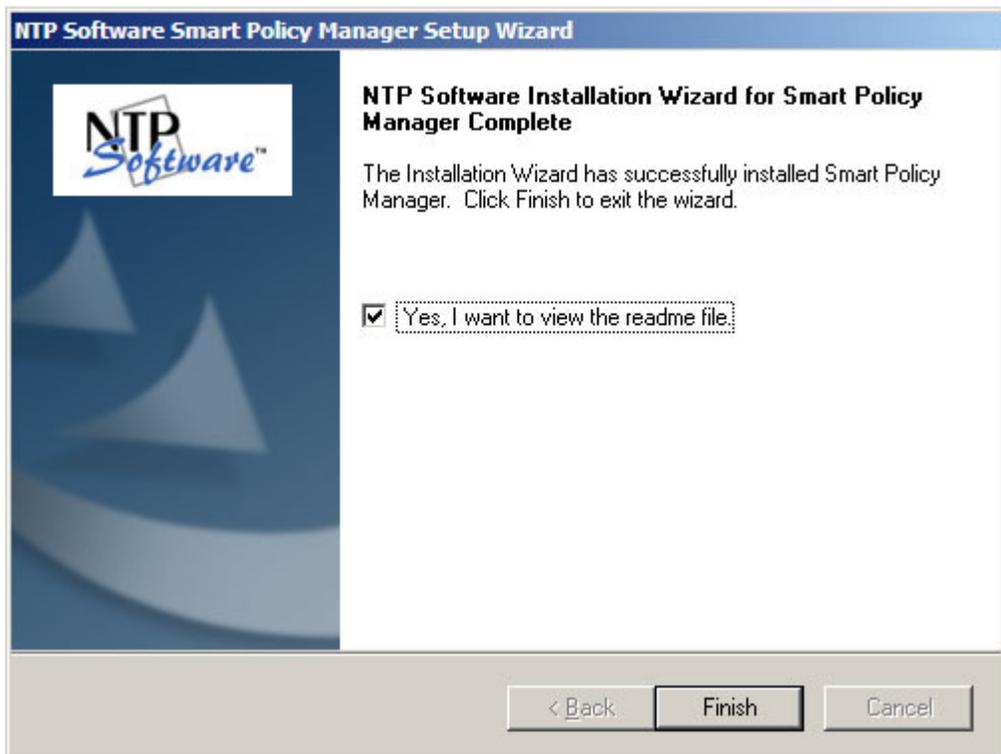
12. The **Start Copying Files** dialog box prompts you to begin copying files. Make sure that the settings are appropriate. If you need to change something, click **Back**. When the settings are correct, click **Next**.

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.

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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**.



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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.

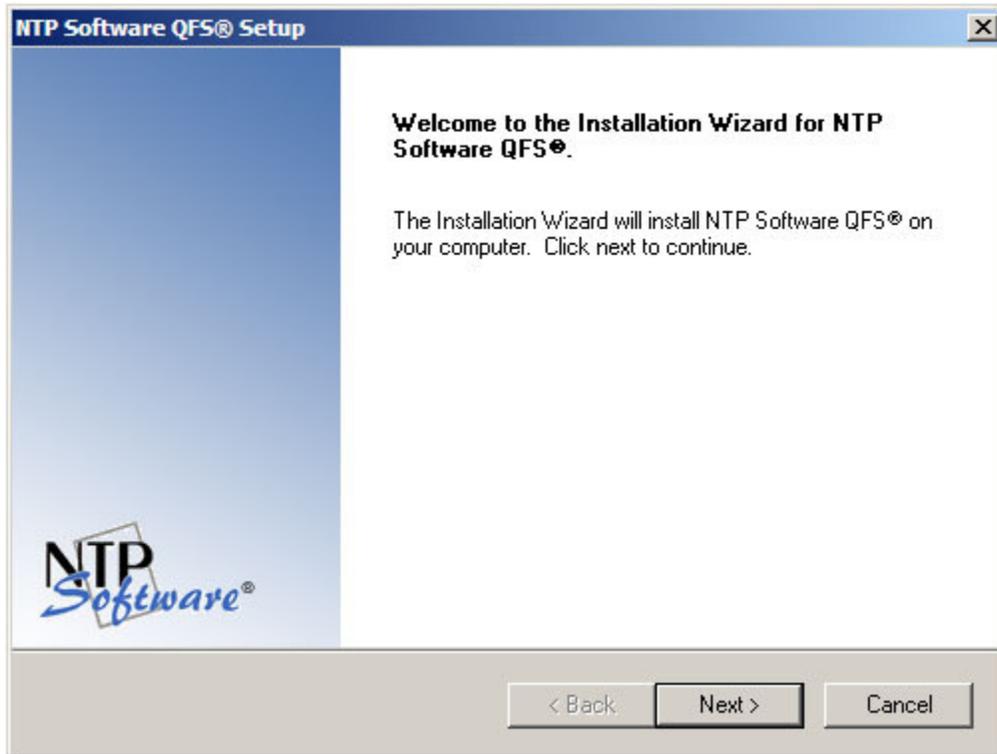
Installing NTP Software QFS® for Windows®

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.

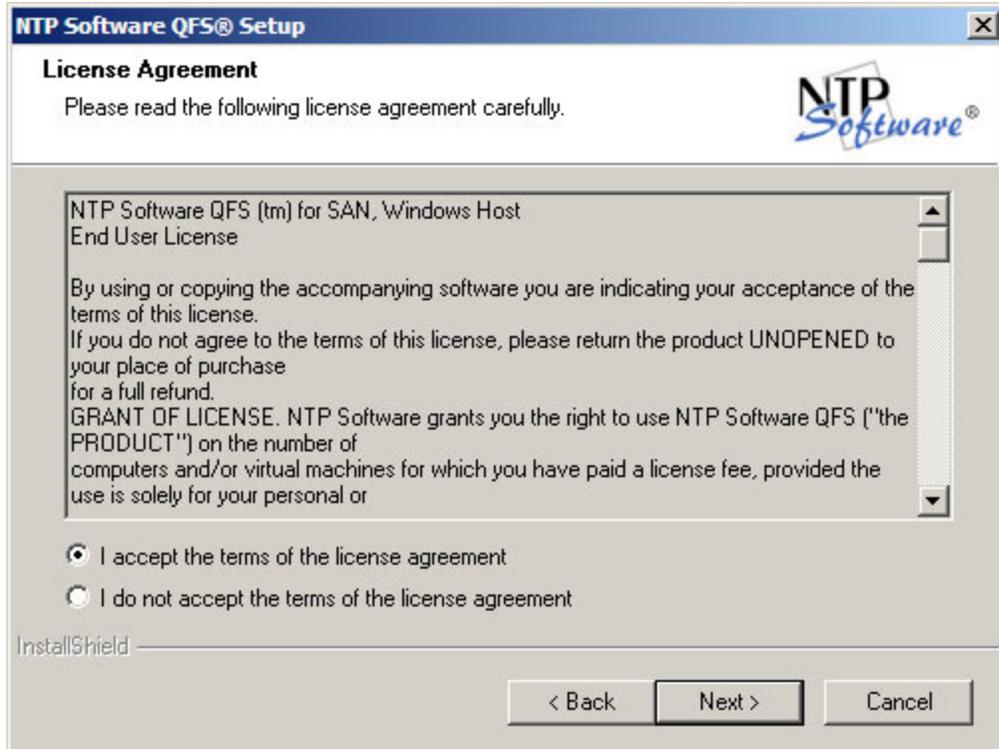
To install NTP Software QFS® for Windows®, do the following:

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.

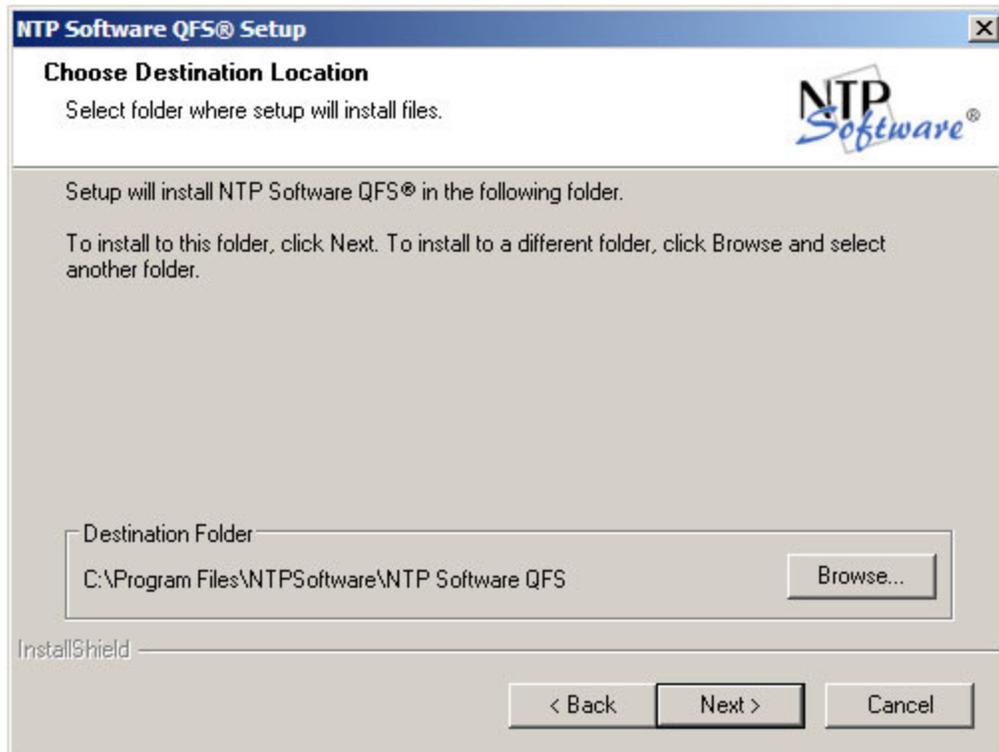


2. In the **License Agreement** dialog box, select **I accept the terms of the license agreement** then click **Next**.

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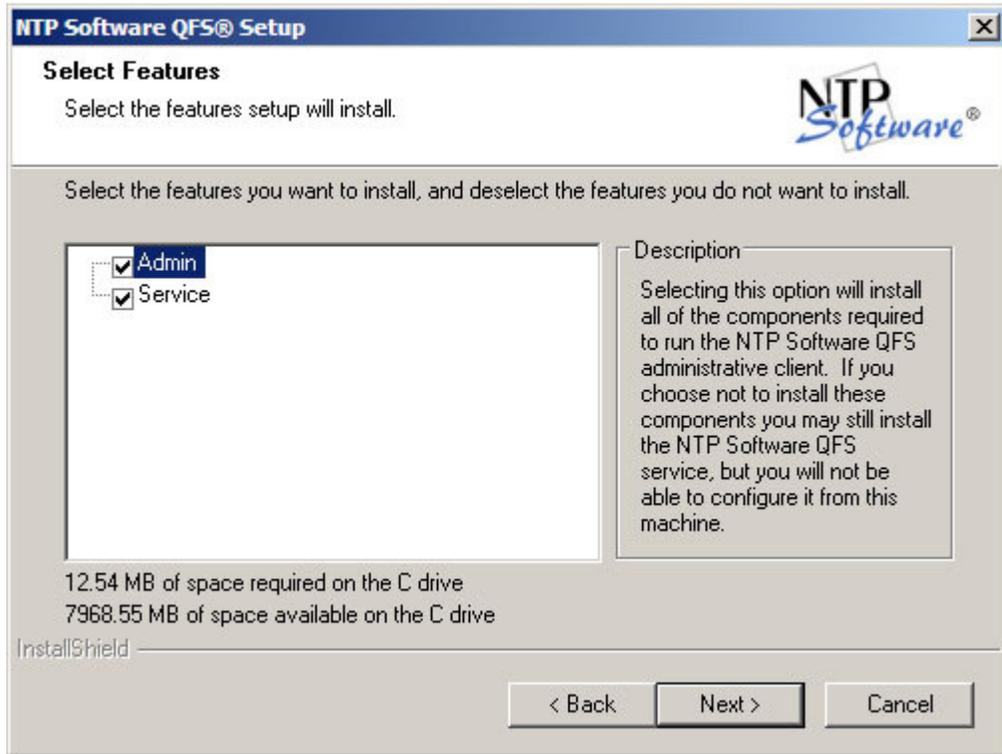


3. In the **Choose Destination Location** dialog box, browse to the desired destination or click **Next** if the default destination location is appropriate.



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

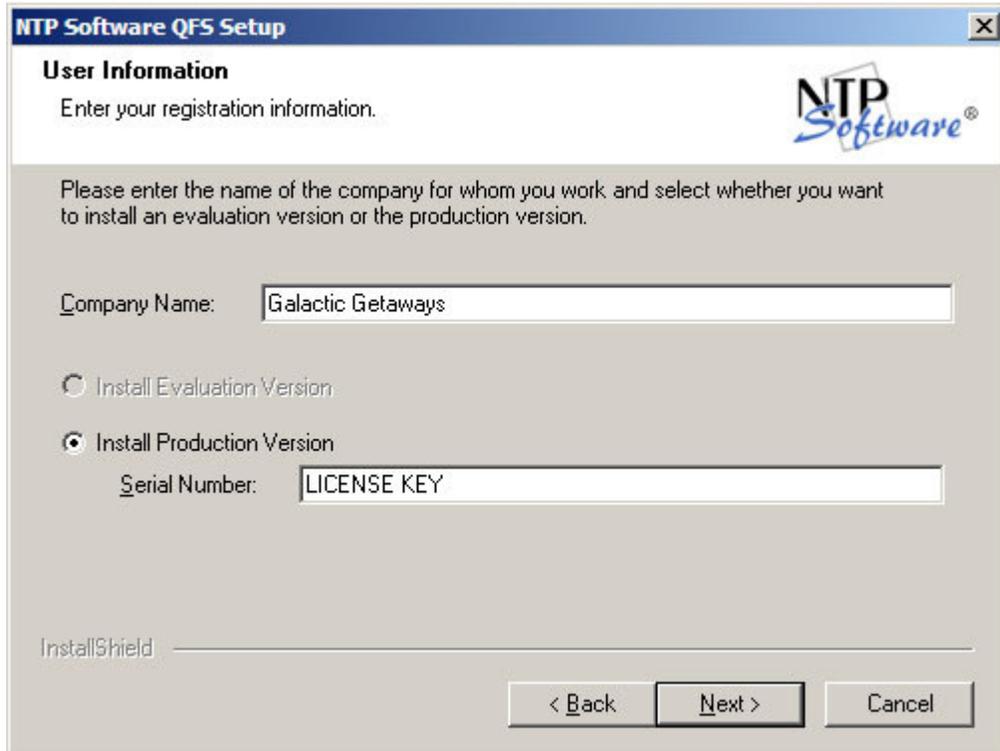


IMPORTANT: Because this is the only server at this point, you need both the Service and the Admin applications. On future installations, you can leave off the Admin app to save space or time.

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.

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NTP Software QFS Setup

User Information
Enter your registration information.

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.

Company Name:

Install Evaluation Version

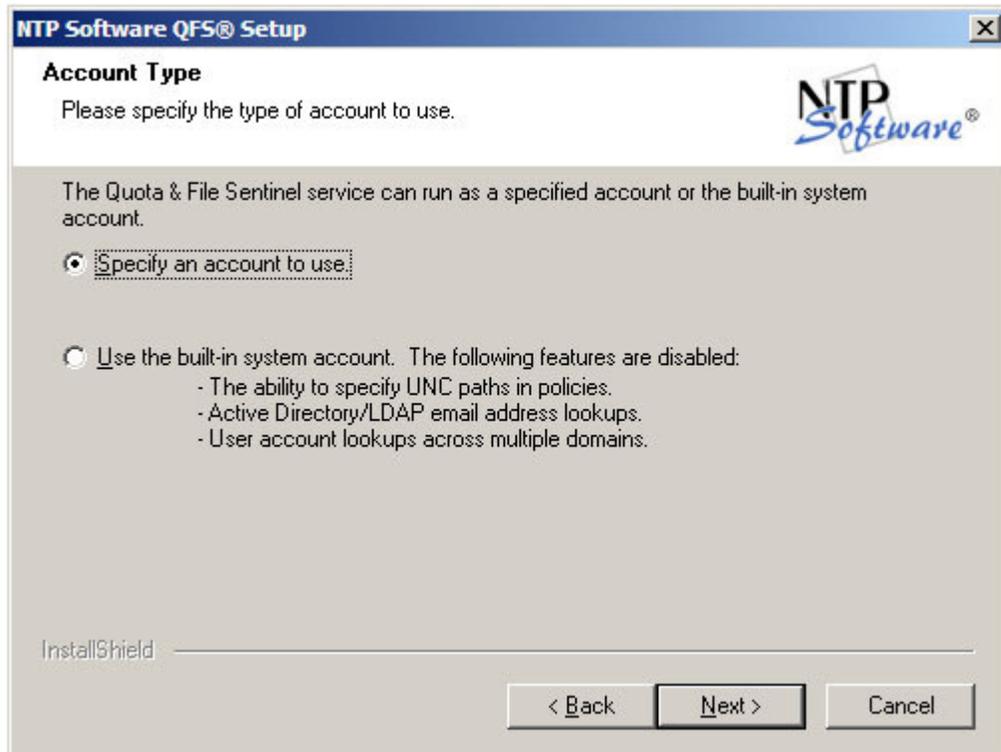
Install Production Version

Serial Number:

InstallShield

< Back Next > 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.

The Quota & File Sentinel service can run as a specified account or the built-in system account.

Specify an account to use.

Use the built-in system account. The following features are disabled:

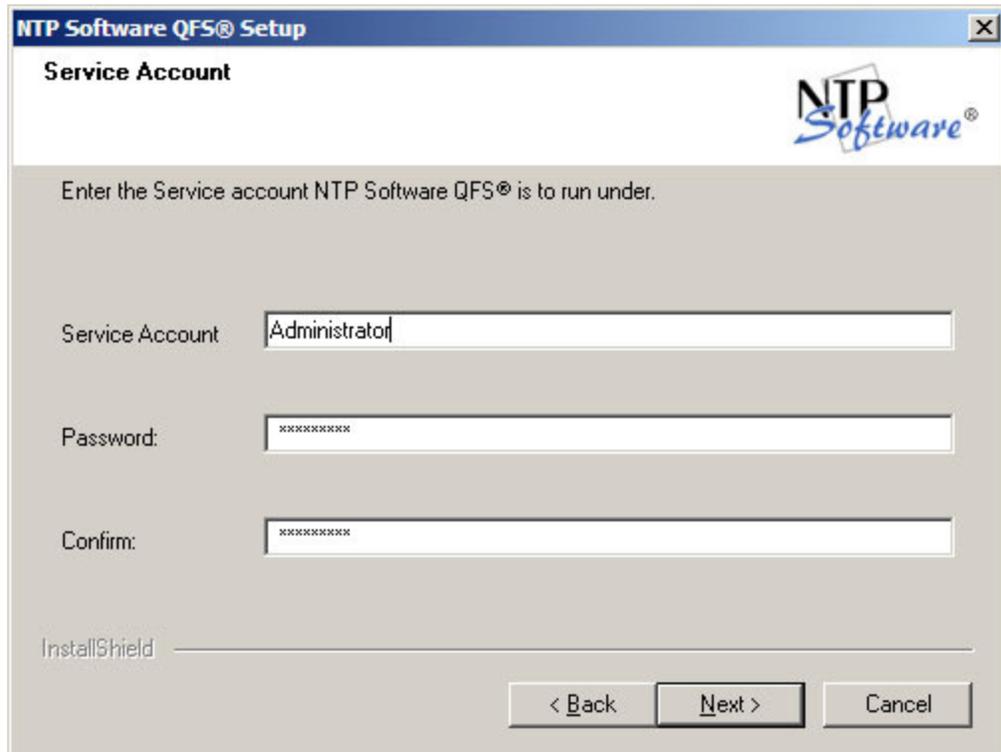
- The ability to specify UNC paths in policies.
- Active Directory/LDAP email address lookups.
- User account lookups across multiple domains.

InstallShield

< Back Next > Cancel

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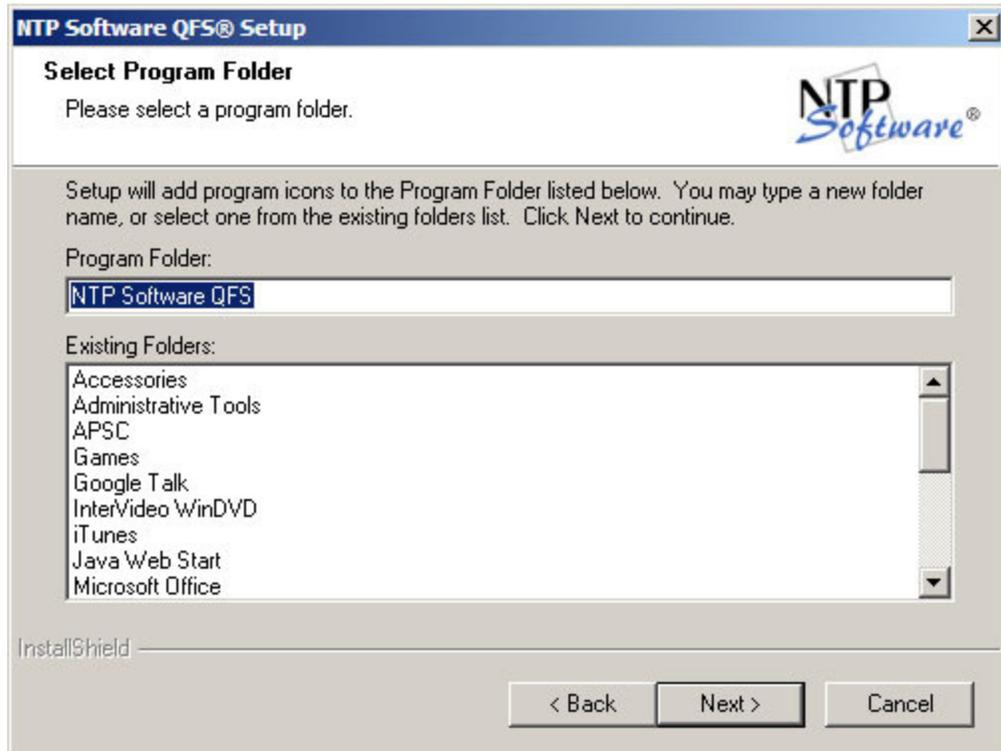
- The **Service Account** dialog box appears, prompting you to specify an account ID under which the QFS service account will run. Use the same account you used for the NTP Software Smart Policy Manager™ Service (preferred), or specify another and click **Next**.



The screenshot shows a Windows-style dialog box titled "NTP Software QFS® Setup". The main heading is "Service Account". Below the heading is the NTP Software logo. The instruction reads: "Enter the Service account NTP Software QFS® is to run under." There are three input fields: "Service Account" containing "Administrator", "Password:" containing "xxxxxxxx", and "Confirm:" containing "xxxxxxxx". At the bottom left, there is a checkbox for "InstallShield" which is currently unchecked. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

IMPORTANT: The QFS service requires special rights to enable QFS to do its job. The setup process adds these rights automatically.

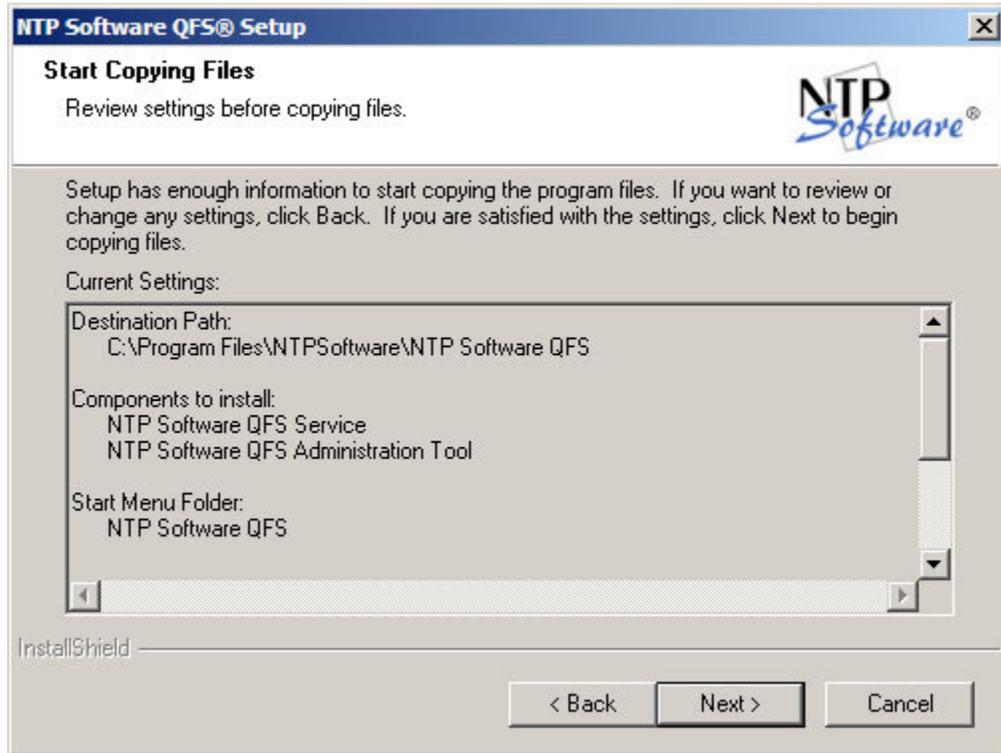
- Specify the program folder (using the default program folder is recommended) and click **Next**. The setup program adds program icons to the program folder.



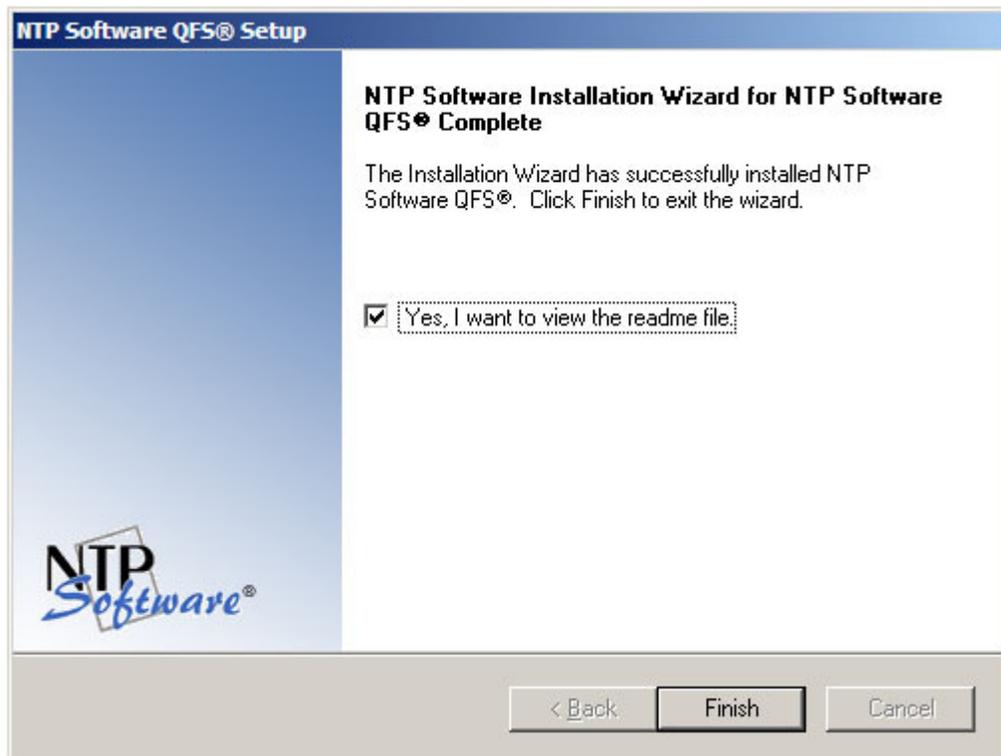
IMPORTANT: By default, NTP Software Smart Policy Manager™ creates a program group for all your NTP Software Smart Policy Manager™-enabled applications.

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.

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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.

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