PowerQuest® PowerExpert™ SRM 5.0

Quick Start Guide

PowerQuest® PowerExpert™ SRM 5.0 Quick Start Guide

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PowerQuest[®] PowerExpert[™] SRM 5.0

This quick start guide includes the following information:

- Introduction
- · Product Benefits
- New Features
- System Requirements
- Installing PowerExpert SRM
- Implementing PowerExpert SRM
- Getting Help
- · PowerQuest Technical Support

Introduction

Welcome to PowerQuest PowerExpert SRM 5.0, the most comprehensive storage capacity optimization solution. PowerExpert SRM is the product that addresses the key storage resource management (SRM) areas:

- · Controlling and monitoring disk space use
- · Reporting on storage content
- Monitoring the health of your storage

PowerExpert SRM is a real-time storage resource management system for Windows 2000. It was designed to be a simple yet powerful product, focused on solving immediate storage problems with a minimum amount of setup and planning.

Installation requirements for PowerExpert SRM are minimal; this product is not dependent on any other products being installed to work properly. The installation is completely self-contained. With the features like policies, auto detection, and detailed reporting, storage policies can be established and enforced with a minimum of administrative intervention. Storage reporting was designed to allow for storage problems to be quickly isolated and resolved in real-time.

PowerExpert SRM:

- Limits the users' disk space by monitoring and enforcing disk usage policies.
- Generates detailed reports of space consumption.
- Prevents unwanted files from being saved on the servers.

Product Benefits

Control. PowerExpert SRM controls the users' storage habits and prevents "runaway disk consumption." You can select the appropriate disk space allocations by user, workgroup, or enterprise.

Enforcement. PowerExpert SRM enforces pre-configured storage policies that have been set.

Continuity. PowerExpert SRM eliminates or reduces system crashes, downtime, and loss of productivity due to lack of disk space or unnecessary space upgrades.

User Awareness. PowerExpert SRM notifies the users of attempts to violate a certain storage policy and educates them about appropriate disk space usage, restricting their wasteful storage habits.

Efficiency. PowerExpert SRM maximizes disk space usage and prolongs the performance of disk space investment, lowering overall storage total cost of ownership.

Recovery. PowerExpert SRM reclaims wasted disk space and identifies which files are not backed up.

New Features

Usability

Centralized Console – PowerExpert SRM provides a console for central management of all your Windows-based storage, including:

- Server appliances based on Microsoft's Windows-Powered Server Appliance Kit
- Direct-attached Windows NT, 2000, Advanced, Terminal, Cluster, and Data Center Servers
- Storage area networks (SANs).

The console integrates seamlessly with other frameworks with SNMP and scriptable interfaces.

MMC-Based Interface – Because the console conforms to the standard Microsoft Management Console interface, navigating through PowerExpert SRM is simple and intuitive.

Web User Interface – The new web interface enhances PowerExpert SRM accessibility, making it easier to control remotely PowerExpert SRM policies and settings and report on storage usage. PowerExpert SRM leverages IIS and other Microsoft technologies to distribute SRM-based information to more people as needed. Users can view their storage reports via any intranet server or kiosk, while system managers and help desk personnel can check the server storage status whenever required.

"Best Practice SRM Policies" – To make it easier to configure an SRM (storage resource management) system, PowerExpert SRM provides preconfigured policies that implement best practices. Administrators can simply select from a menu of best practice policies and make any custom edits, such as inserting a help desk number, and apply the policy to servers.

Alarm History – To make it easier to reuse alerting messages, PowerExpert SRM keeps a history of previously used alert messages. Administrators can simply select from a menu of previously used alert messages and make any custom edits. New alerts will also be stored in the alert history.

Published Program Interfaces – To make it possible to integrate PowerExpert SRM functionality into custom corporate environments, a published, documented DCOM interface is available. Customers can control all of PowerExpert SRM capabilities from VB Script or other programming languages or management consoles.

Scalability

Enhanced Support of Microsoft's Windows 2000 Active Directory – PowerExpert SRM has the ability to write storage policy definitions inside the Windows 2000 Active Directory, thereby mandating the automation of storage policy across the enterprise. Storage policies include space allocation alarms and actions, scheduled SRM for Windows Enterprises report generation, blocking of unauthorized content, and integration with data protection and availability products.

Windows Installer and SMS Installation – PowerExpert SRM installs on any number of Windows servers efficiently and with minimal administrator effort. Administrators simply install PowerExpert SRM on a Microsoft SMS server, which propagates the installation out to tens, hundreds, or even thousands of specified servers across the enterprise.

Rapid File Scanning – Reports run 700 percent faster than previous PowerExpert SRM releases by reporting on file meta data stored in the NTFS Master File Table. Rather than "touching" each file when running storage usage reports, PowerExpert SRM simply runs against the NTFS Master.

File Table – The new file table makes reporting on a large scale more quick and resource-efficient.

File Blocking by Type and Header – PowerExpert SRM blocks unwanted file types such as MP3 files, even if clever users attempt to disguise unauthorized file types as legitimate file types. Because it scans by file type and by header information, PowerExpert SRM is virtually impossible to fool.

SRM Reporting

Enhanced SRM Reporting – Reports include capacity planning, details trend analysis, reports by Active Folder hierarchy, integration with Active Folder user profiles, nightly backup capacity, enhanced security reporting, reporting on extended attributes, and reporting on percentage of space allocations. Also, a robust custom-report generator enables users to narrow down the contents of an initial report by applying additional filtering and sorting criteria.

Chargeback Reporting – IT departments can implement disk usage accountability by department, division, location, or workgroup.

Drill-Down Reporting – To probe further into the summary reports, users simply click on any summary report item to generate the detailed information that supports the summary data. For example, by clicking on the summary report called "graphic files," which shows

a sum total number of these files and the total amount of space they use, a detailed report listing each individual file will be generated. From the detail, the user can view, move, or delete individual files or groups of files by right-clicking the items from a web browser.

Multiple-Alarm Actions – When any individual disk utilization alarm being activated, multiple actions can execute. For example, at 80 percent of the object's disk space allocation, PowerExpert SRM can run disk cleanup reports, extend the volume, notify the administrator, migrate files, perform cleanup actions, e-mail the user, and submit data to the event log.

System Requirements

Agents

- Windows XP, 2000 Professional, Server, Advanced Server, or Datacenter Server; or Windows NT 4.0 Server (SP 6a)
- Internet Explorer 5.5 or later
- 128 MB RAM for Professional: 256 MB for others
- 2 GB of available disk space recommended

Collector or Console

- Windows XP, 2000 Professional, Server, Advanced Server, or Datacenter Server
- 256 MB RAM for Professional; 512 MB for others
- 2 GB of available disk space recommended

Installing PowerExpert SRM

Active Directory does not allow the Administrator to be "trusted for delegation." Therefore, in Active Directory, a new user account must be created with all the rights, privileges, and responsibilities of an Administrator. To install PowerExpert SRM, you must be logged into a Domain as a user who is a member of the Administrators, Domain Admins, Schema Admins, and Enterprise Admins groups. Additionally, this user will need to enable the Account option of Account is trusted for delegation found under the Account tab of user properties. You will not be able to run PowerExpert SRM services if you are using the system account. The services can only be run by a user set up with the above rights and privileges.

- 1 Place the CD in the drive.
- 2 Click Install.

A message prompts you to uninstall PowerExpert ST 4.1 if you had it installed on your machine.

- 3 Click Next twice.
- **4** Read the License Agreement. On the first **License Agreement** dialog, click "**I accept** the terms of the license agreement" option, then click **Continue**.
- **5** On the second **License Agreement** dialog, read the license agreement for Microsoft Software Appliance Kit, then click **Next**.
- **6** Type the UserName, Organization, and Serial Number, then click Next.
- **7** On the **Active Directory** dialog, click **Yes** or **No** for the product to support Microsoft's Windows 2000 Active Directory, then click **Next**.
- **8** Click **Next** to install all the files to the default **Destination Folder**, or click **Change** to select your own path.
- **9** If you clicked the **Change** button in step 8, the **Change Current Destination Folder** dialog appears. Click **OK** to select your own path.
- **10** Expand Agent, Collector, and User Interface, select one of the available options then click **Next**.
- 11 (Optional) On the SQL Server dialog, type the SQL User, Password, and Confirm Password, then click Next.

This step is required if you want to connect to an SQL Server for the Trend and Audit databases

- **12** On the **Administrator Password** dialog, type the **User Name**, **Domain**, **Password**, and **Verify** information, then click **Next**.
- **13** Type mail information, then click **Next**.

This is used when notification messages and reports are e-mailed. If you leave these fields blank during installation, you can enter mail information in the properties dialog.

14 Click **Next** to install the Trend database to the default **Destination Folder**, or click **Change** to select your own path.

- **15** On the **Ready to Install Program** dialog, click **Install**. The installation progress is displayed on the status bar.
- 16 Click Yes if you want to extend Active Directory Schema. This is only done once per domain.
- 17 Click Yes if you want to install Policies and Report Sets in the Active Directory. This is only done once per domain.
- **18** From the **InstallShield Wizard Completed** dialog, click **Finish** to complete installation of the program.

Implementing PowerExpert SRM

PowerExpert SRM is best implemented in a corporate environment that already has Storage Resource Management (SRM) policies. This documentation provides a general guideline for the components that should be included in an SRM policy. PowerExpert SRM provides the means to implement an SRM policy that includes the components outlined in this quick start guide.

If you have not already established corporate SRM best practices, PowerExpert SRM can provide information that will help you establish an SRM policy. After you have an established policy, PowerExpert SRM is useful for monitoring and enforcing it.

Components of PowerExpert SRM

- Storage Auditing/Reporting
- Quota and Policy Management
- Block Unwanted Content
- User Empowerment
- Data Trending

Storage Auditing/Reporting

You can use auditing, standard reports, and customizable reports in PowerExpert SRM to provide valuable information for the development of your corporate SRM policies, as well as to monitor storage use after the policies are developed. A space audit will help you identify the type of files that are consuming your disk resources and determine the usage habits of your users. Additionally, the storage audit can help identify which disk objects should be included in your SRM policy. Typically, disk objects can be categorized (for

example, user shares, group shares, project shares, application areas, database areas, cost centers). With this detailed information, you can develop space allocation rules and blocking rules, based on your organizational needs and requirements.

If a corporate SRM policy is already in place, a storage audit can determine if the policy is being adhered to and, if not, who is in violation. Periodic storage audits, or audit activity triggered at certain levels of space consumption, can ensure SRM policies are being adhered to, or can be used to justify the addition of disk resources.

Quota and Policy Management

Space allocations can be enforced or implemented to monitor disk space consumption and activate post-alarm actions based on consumption thresholds. If space allocations are to be enforced, your corporate SRM policy should detail these space allocations on a user or object basis. Additionally, the SRM policy should detail the procedure for increasing space allocations.

Allocation rules should also include alarm actions to be taken when consumption reaches specified levels. These will vary depending upon the objects being monitored. For example, an alarm threshold exceeded on a user home directory may simply send notification to that user, whereas an alarm threshold exceeded on an entire partition may alert members of the administrators group.

In addition to determining who receives alarm messages, you control the content of the messages. The message may be simple text or may include a report with detailed file lists of questionable or stale data that are candidates for deletion or archival to recover space. See "User Empowerment" on page 9.

Other aspects of the allocation rules may include the automated execution of scripts, adjustment of space allocations, integration with paging utilities or SNMP traps. All of these elements should be considered and addressed in a corporate SRM policy.

Block Unwanted Content

Increased use of the Internet and e-mail have, in many cases, made corporate file and print servers a virtual playground for users. Games, graphics files, screen savers, AVI, movie, and music files clutter servers—taking up valuable disk space, extending backup/restore windows, and wasting administrative resources. Perhaps more important, some files stored on corporate servers may be a liability to the company. Music files stored in shared areas are violating copyright laws; offensive graphics, AVI, or movie files being backed up are considered corporate property.

For these reasons, it is essential that a corporation limits its liability by developing SRM policies that specify the appropriate and inappropriate use of file servers, including the types of files that are not to be stored. Implementing an SRM utility that monitors or prevents unwanted files from being saved to corporate disk resources limits corporate liability.

User Empowerment

The first step in empowering employees to make wise storage decisions is to publish corporate SRM policies. The second step is to provide users, administrators and owners of data valuable information as part of the allocation rules and alarms. PowerExpert SRM includes messaging components for allocation rules. You can also use messages to educate users about space consumption. Messages can be implemented with login scripts or client-side Windows Explorer snapins. As implementing client components can be a large undertaking, you may want to plan for such in a corporate SRM policy. Messaging, however, is just one component of user empowerment.

Because administrators do not own the data that is consuming disk space, it is difficult for them to make generalizations to determine the value of such data. For this reason and others, it is vital to push the administration of disk space back to the owners of the data. To do so, a corporate SRM policy should categorize areas of disks (shares) and determine who is responsible for that disk space and what information will help them manage that space. You can share information by posting reports to an intranet or including them in alarm messages in a format that allows the recipient to actively manage the listed files. The content of these reports should be considered in development of a corporate SRM policy. Typical reports may include files with questionable content, stale files ready for deletion or archival, e-mail files, files with undefined owners, and so forth. A storage audit will help you identify additional file types that should be included in reports sent to owners of data. The Active Reports feature of PowerExpert SRM allows for this dynamic file management capability.

Data Trending

A corporate SRM policy should include overall requirements for data trend analysis and associated action steps. For example, three months before a disk is full, you could begin the purchase procedure for additional resources or migrate data. The actual implementation of trend analysis will allow much more granularity. For example, you could trend the growth rate of files not accessed in over a year to help determine if an archive product implementation should be researched.

Getting Help

When you need information beyond what this quick start guide provides, online help is your best solution. Click **Help** in any dialog in PowerExpert SRM, or click **Help > Help Topics** on the menu bar.

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