



Installation and User Manual for FilerScaler™

Version 2.0

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System Requirements

- Pentium IV class processor or equivalent
- 256 MB RAM
- 5 MB free disk space for installation
- Shared SAN storage (for Clustered Shares)
- LAN (TCP/IP) connection
- SVGA – min. 800x600, 256 colors
- .Net Framework v3.5
- SQL Server™ 2005, 2008 or SQL Server Express™

Supported Operating Systems

- Windows Server 2003™ x64
- Windows Server 2003 R2 x64
- Windows Server 2008™ R1 x86, x64
- Windows Server 2008 R2 x64

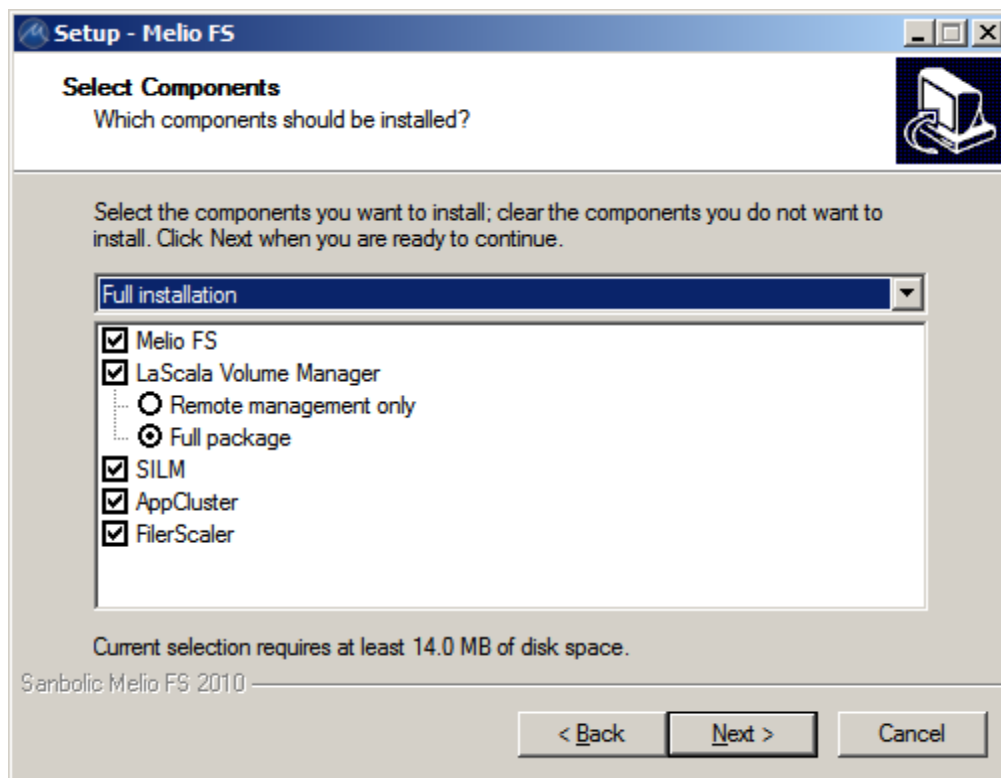
Note: Windows Server 2003 x86 and Windows Server 2003 R2 x86 are not supported.

About FilerScaler

FilerScaler is a management application that greatly simplifies the management of Windows file shares by allowing administrators to create, modify and remove file shares hosted by multiple servers from a centralized management console. Using FilerScaler, administrators can create file serving clusters with shared SAN storage provided by Sanbolic Melio FS to significantly improve the performance, scalability and availability of Windows file shares.

Installing FilerScaler

During the installation of Melio 2010™, if the user selects “Full Installation,” which is the default setting, FilerScaler will be installed automatically with no additional prompting necessary. If FilerScaler is removed from the list of selected components, the software will not be installed.

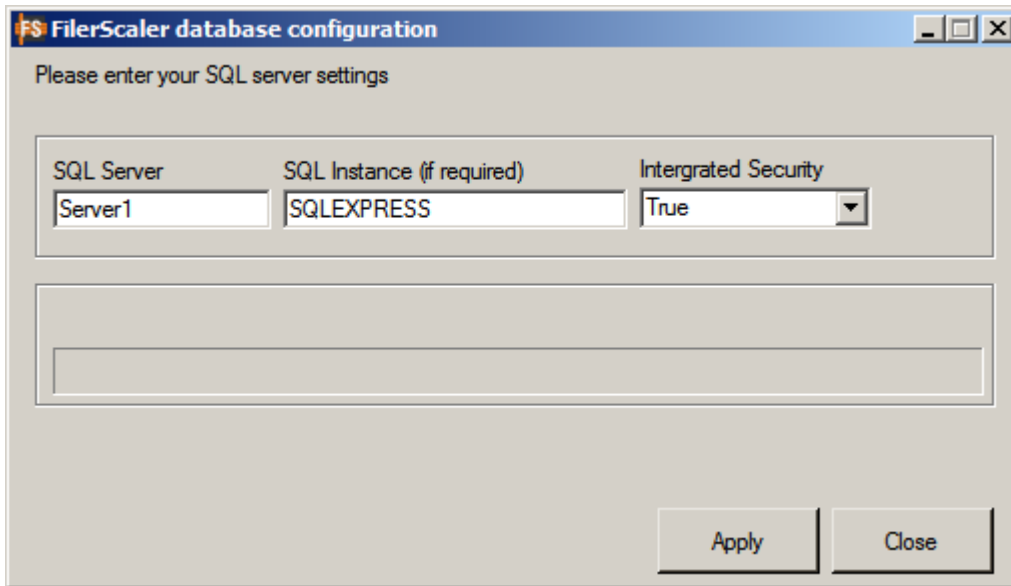


Configuring the FilerScaler database

Before using FilerScaler for the first time, the FilerScaler database must be configured.

To configure the FilerScaler database, go to **Start > All Programs > Sanbolic > FilerScaler Configuration**.

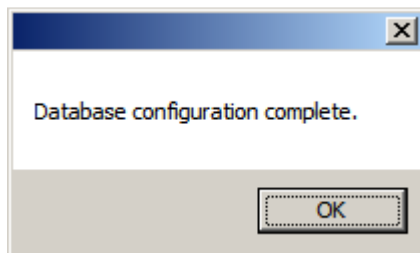
The following screen will be displayed:



The screenshot shows a window titled "FS FilerScaler database configuration". The window contains the text "Please enter your SQL server settings". Below this text are three input fields: "SQL Server" with the value "Server1", "SQL Instance (if required)" with the value "SQLEXPRESS", and "Intergrated Security" with a dropdown menu set to "True". There is a large empty text area below these fields. At the bottom right of the window are two buttons: "Apply" and "Close".

Enter the name of the SQL Server and SQL Instance where the FilerScaler database will reside and click **Apply** to apply the settings.

The following screen will appear:



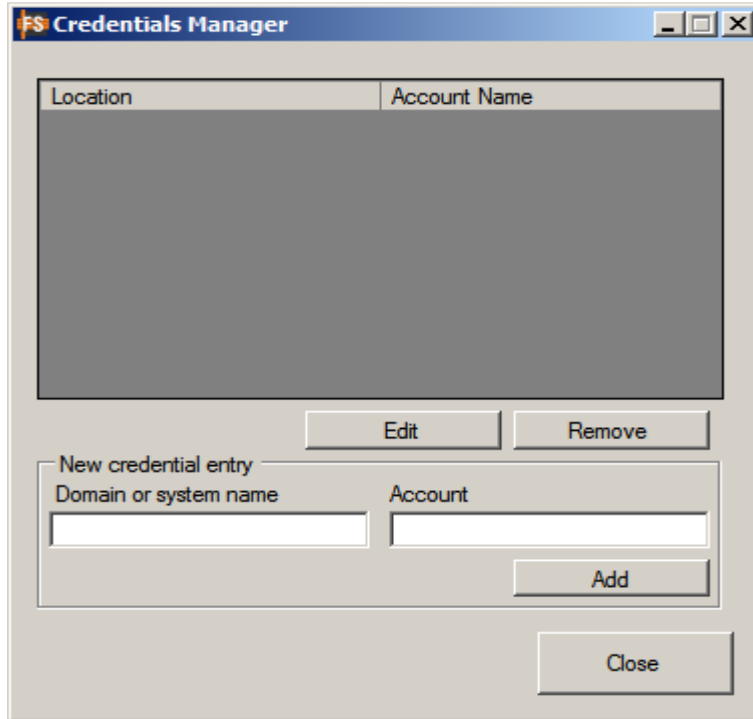
Click **OK** to close the **FilerScaler database** configuration window.

The FilerScaler database is now configured.

Logging into the FilerScaler management console

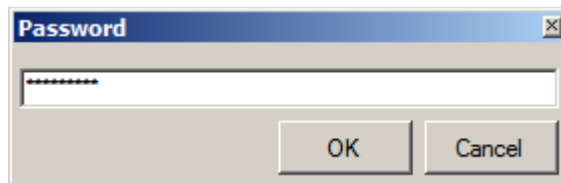
To open the FilerScaler management console, go to **Start > All Programs > Sanbolic > FilerScaler**.

When FilerScaler is launched for the first time, the following screen will appear:



Note: At least one account must be added to manage file shares with FilerScaler.

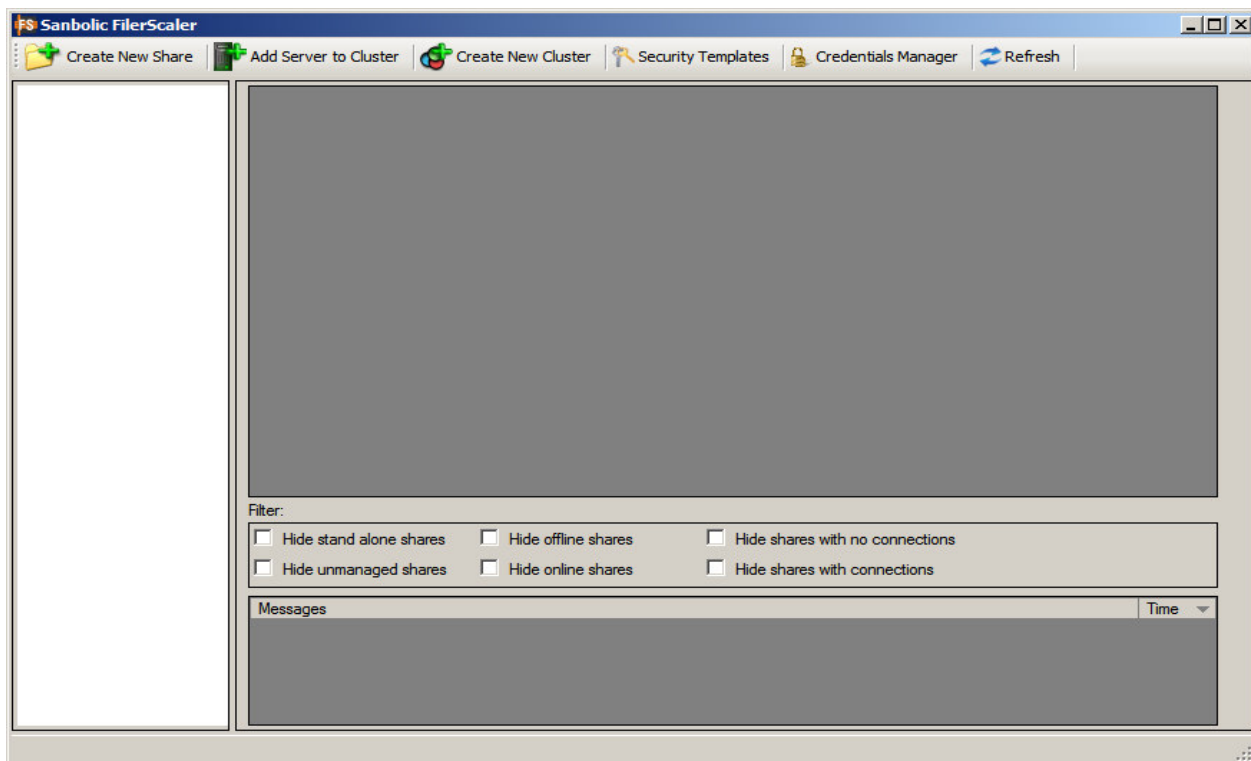
To add a new account, enter the domain (FQDN) or machine name, followed by the name of the account and click **Add**.



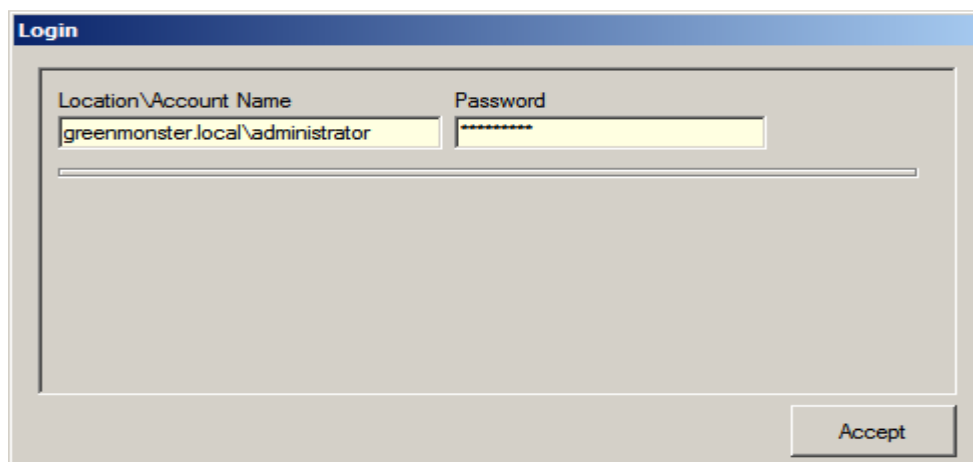
Enter the password for the new account and click **OK**.

When you have finished adding one or more accounts, click **Close** to close the **Credentials Manager** configuration window.

The FilerScaler management console will appear as follows:



The next time FilerScaler is launched, the following screen will be displayed:

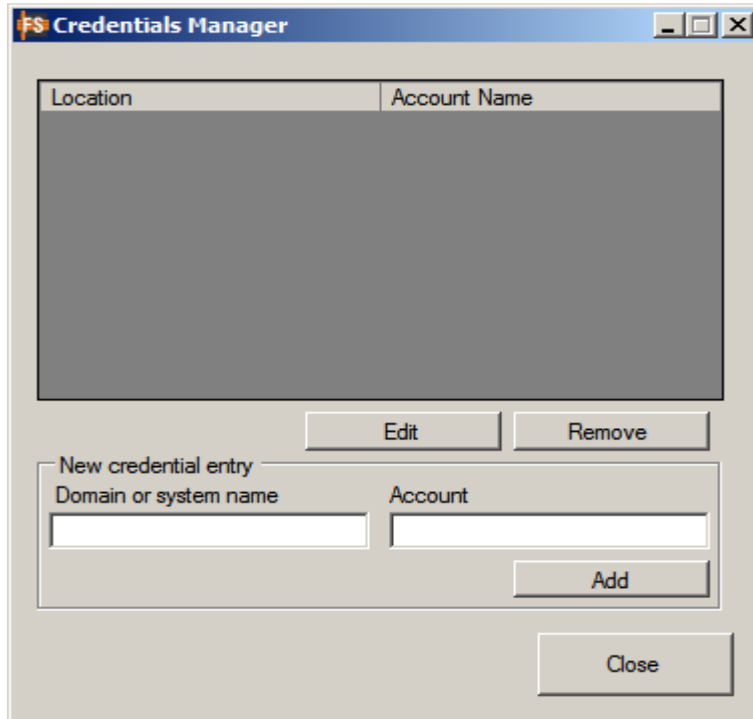


Enter the password for the specified account and click **Accept** to proceed to the FilerScaler management console.

Credentials Manager

Note: You can add/edit/remove accounts from FilerScaler at any time by clicking **Credentials Manager** in the toolbar at the top of the management console.

The **Credentials Manager** configuration window will appear:



To edit an account, select the account from the list, click **Edit** and edit the account.

To remove an account, select the account from the list and click **Remove**.

When you have finished managing accounts, click **Close** to close the **Credentials Manager** configuration window and return to the management console.

Managing file shares

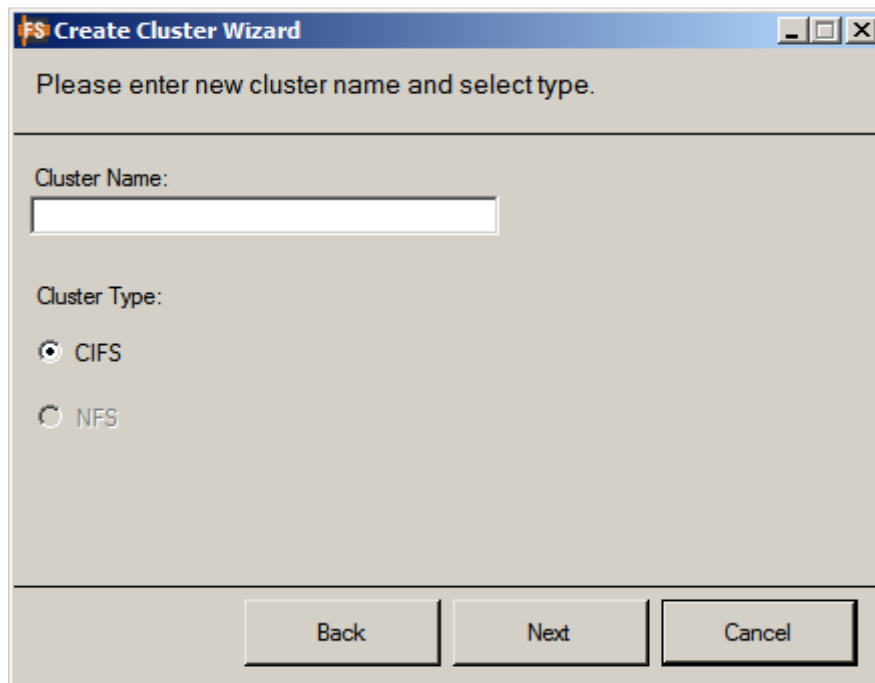
Important: To simplify the management of file shares, FilerScaler employs the following hierarchical design:

- > Clusters (groups of file servers)
 - > File Servers
 - > File Shares

Note: At least one Cluster must be configured before any file shares can be created.

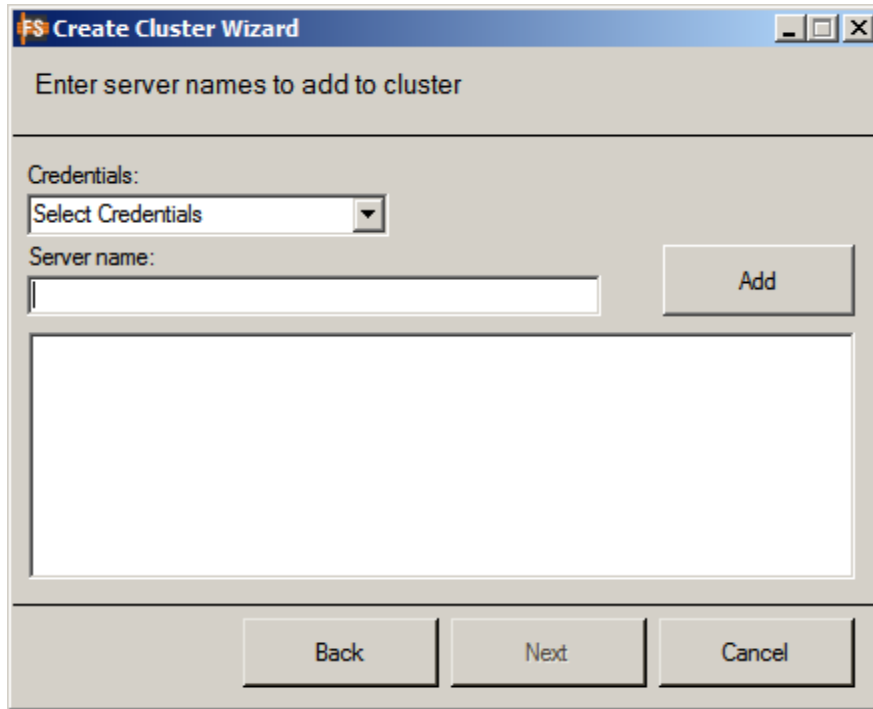
Creating a file serving cluster

To create a Cluster, click **Create New Cluster** in the toolbar at the top of the management console.



In the **New Cluster** configuration window, enter a name for the new Cluster and click **Next**.

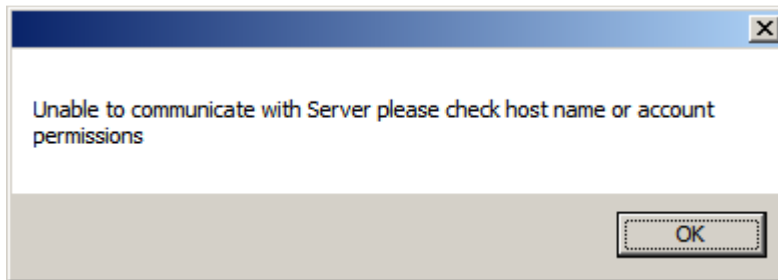
Note: The current version of FilerScaler supports CIFS file shares *only*. Support for NFS file shares will be available in a future release.



Use the drop-down menu to select the credentials that will be used to create the Cluster and enter the name of the server(s) that will be added to this Cluster.

Click **Add** to add the server(s) to the Cluster.

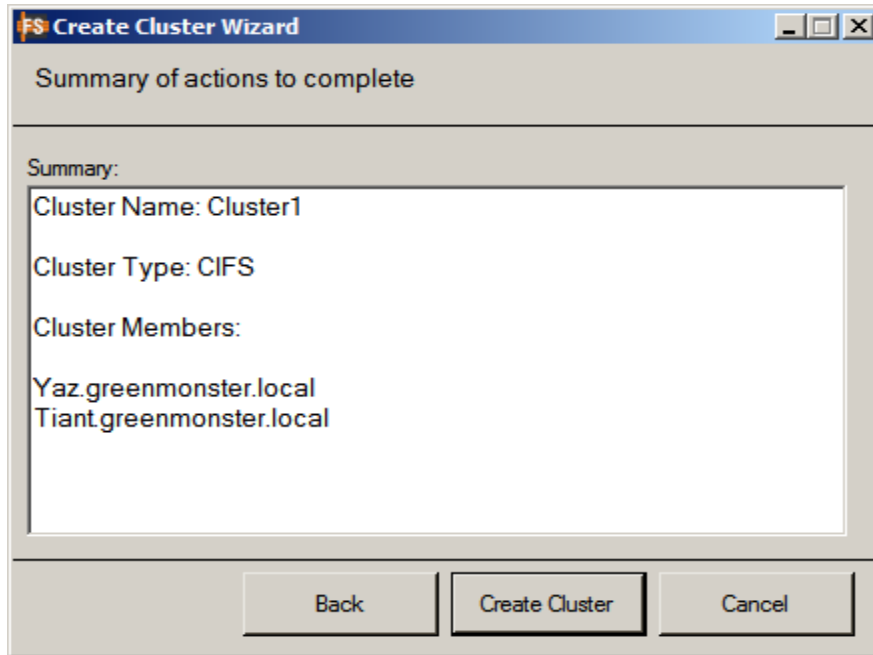
If a server name was entered incorrectly or if the server is unavailable or does not exist, the following screen will be displayed:



Click **OK** to return to the **Add Servers** window.

Retype the name of the server you want to add to the Cluster, click **Add** and then click **Next**.

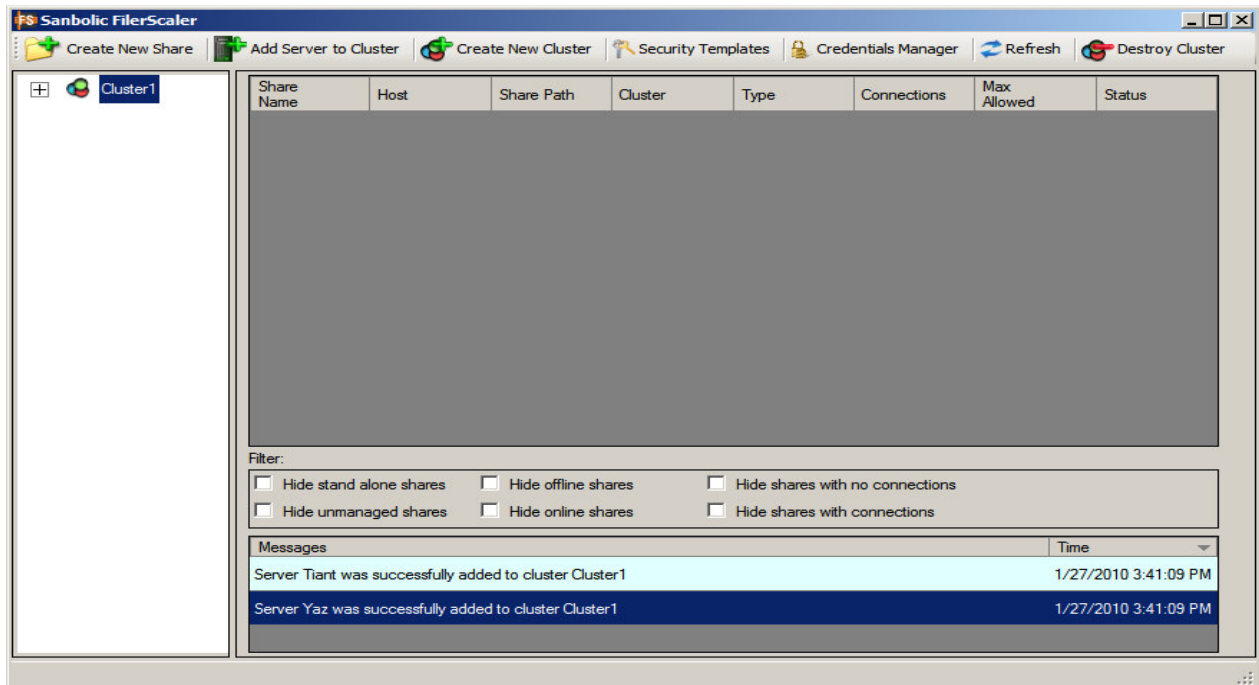
A summary of the configuration for the new Cluster, including the Cluster Name, Type and Members, will be displayed as follows:



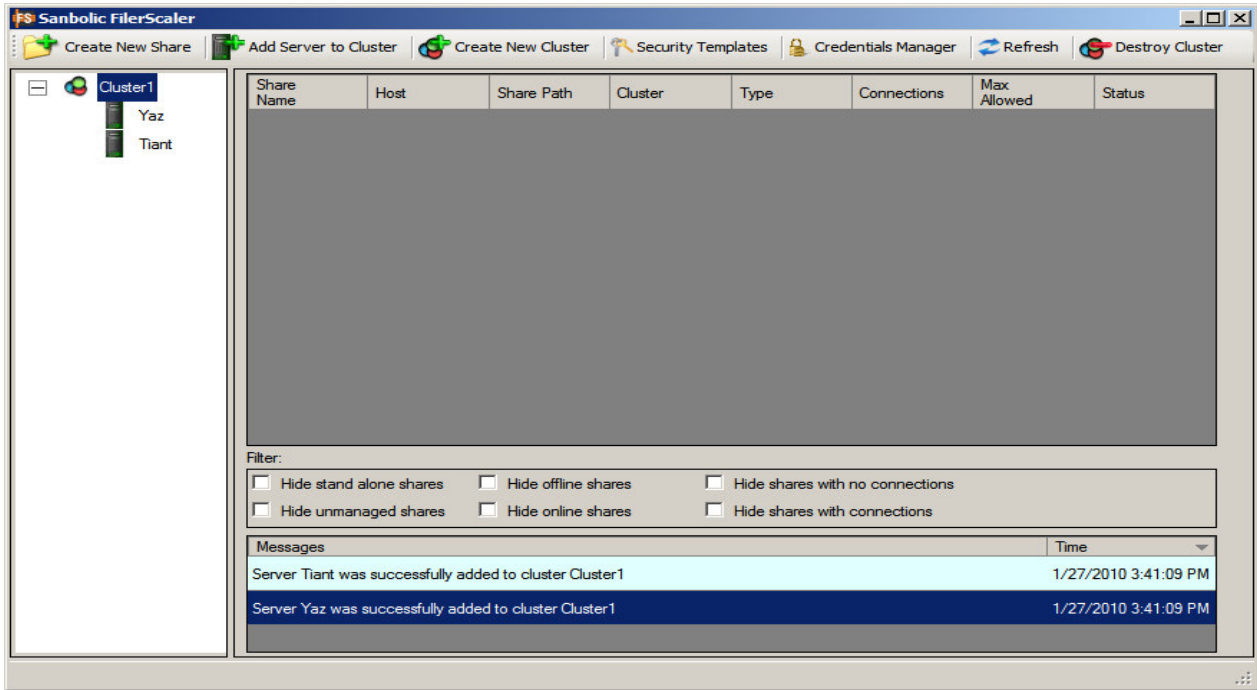
Click **Create Cluster** to create the new cluster.

The new Cluster will be created and will appear on the left-hand side of the management console.

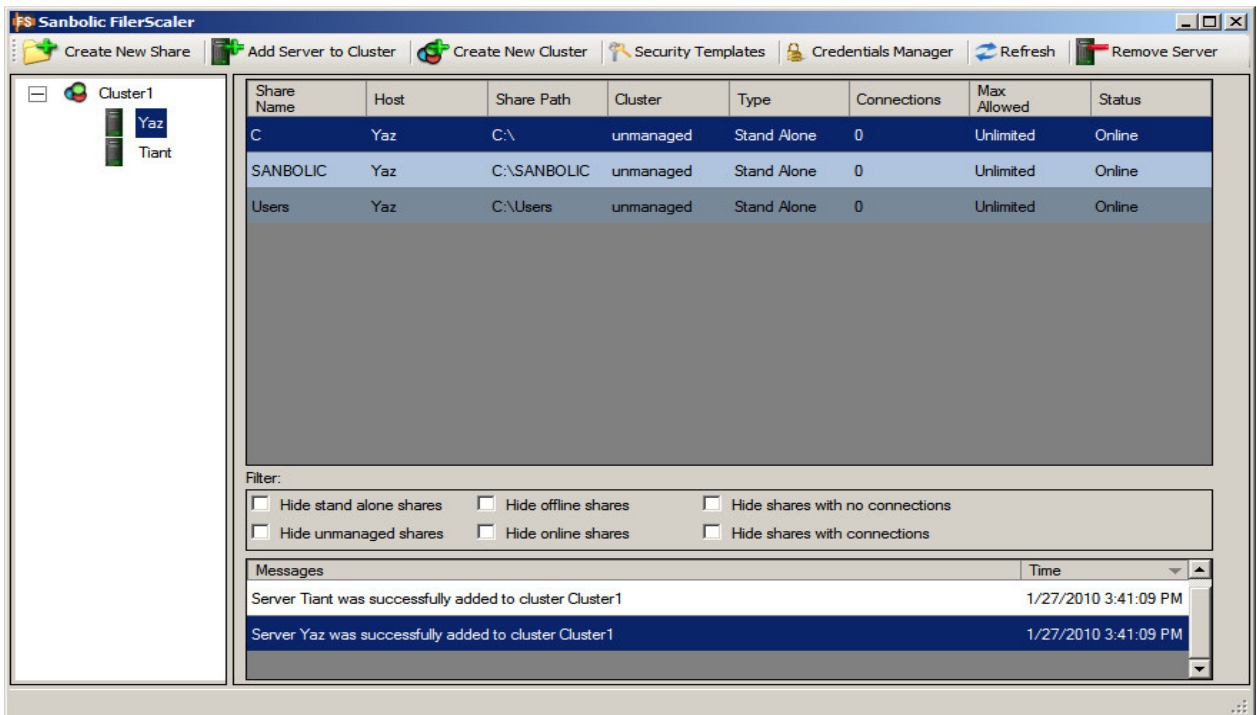
Note: You can add more servers to the Cluster at anytime by clicking **Add Server to Cluster** in the toolbar, which will take you to the **Add Servers** window.



Click the plus (+) sign to open the tree for the new Cluster.



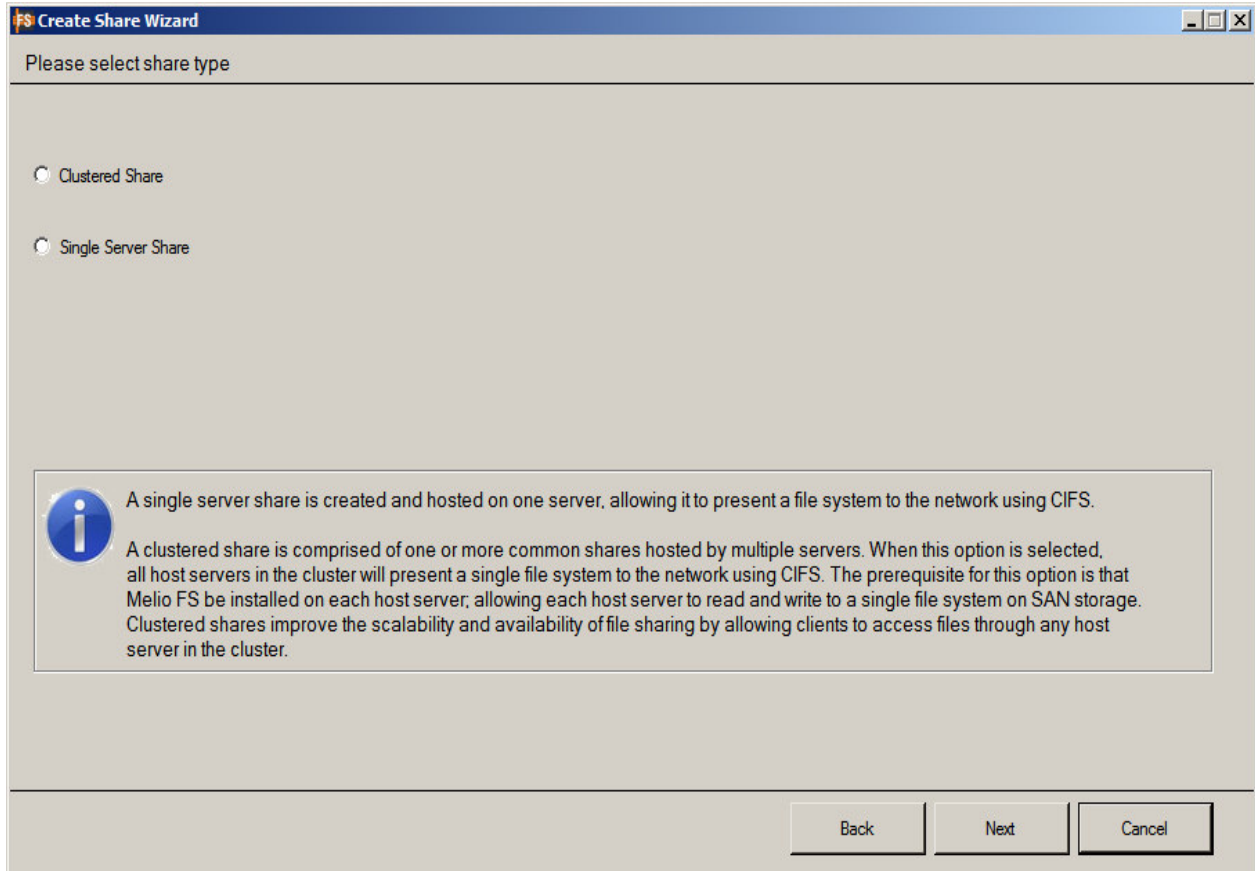
Click on a server to see all the file shares currently available on that server.



Creating a file share

To create a new file share, click **Create New Share** in the toolbar.

The following screen will be displayed:



Single Server Share: A file share hosted by a single server. The file share will not be highly available since it can only be hosted by one server.

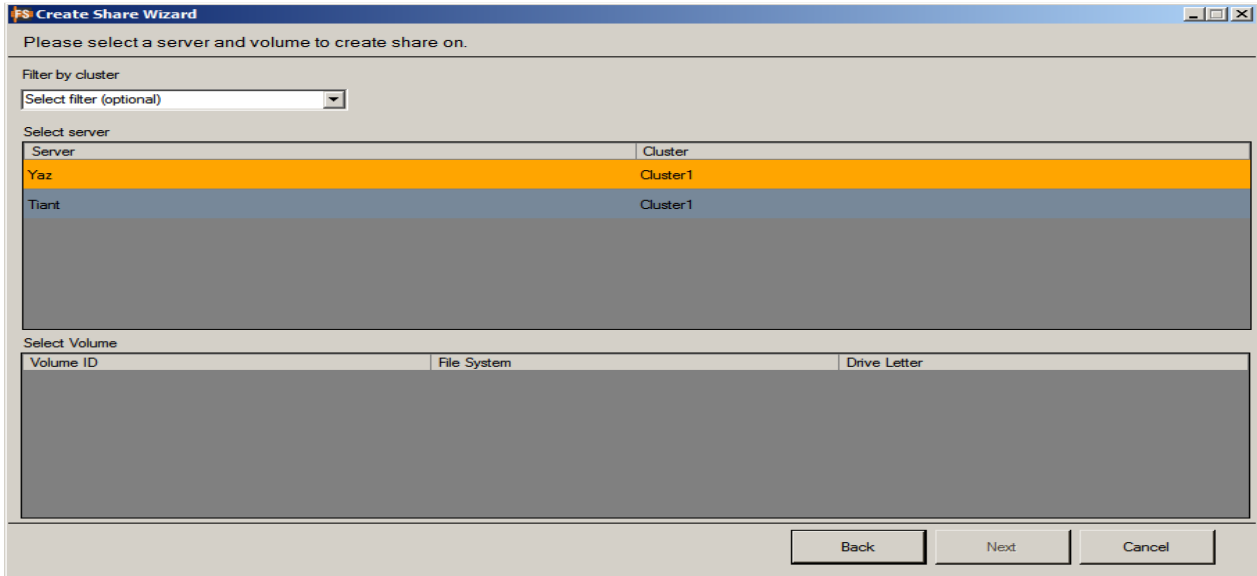
Clustered Share: A file share hosted by multiple servers. The file share *must* reside on a Melio shared volume that is accessible by multiple servers, allowing the file share to be highly available.

Note: For information on how to create a shared volume using Melio FS, please refer to the Melio FS Users Guide (**Start > Programs > Sanbolic > Melio FS Users Guide**).

Creating a Single Server Share

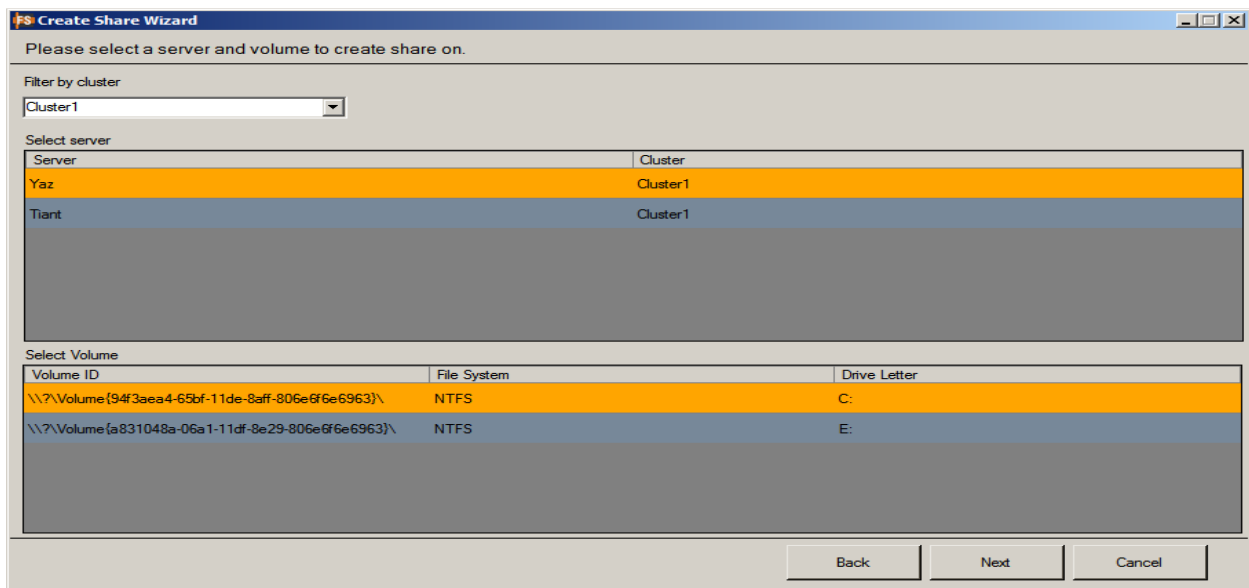
To create a Single Server Share, select **Single Server Share** in the **Select Share Type** window.

The following screen will appear:



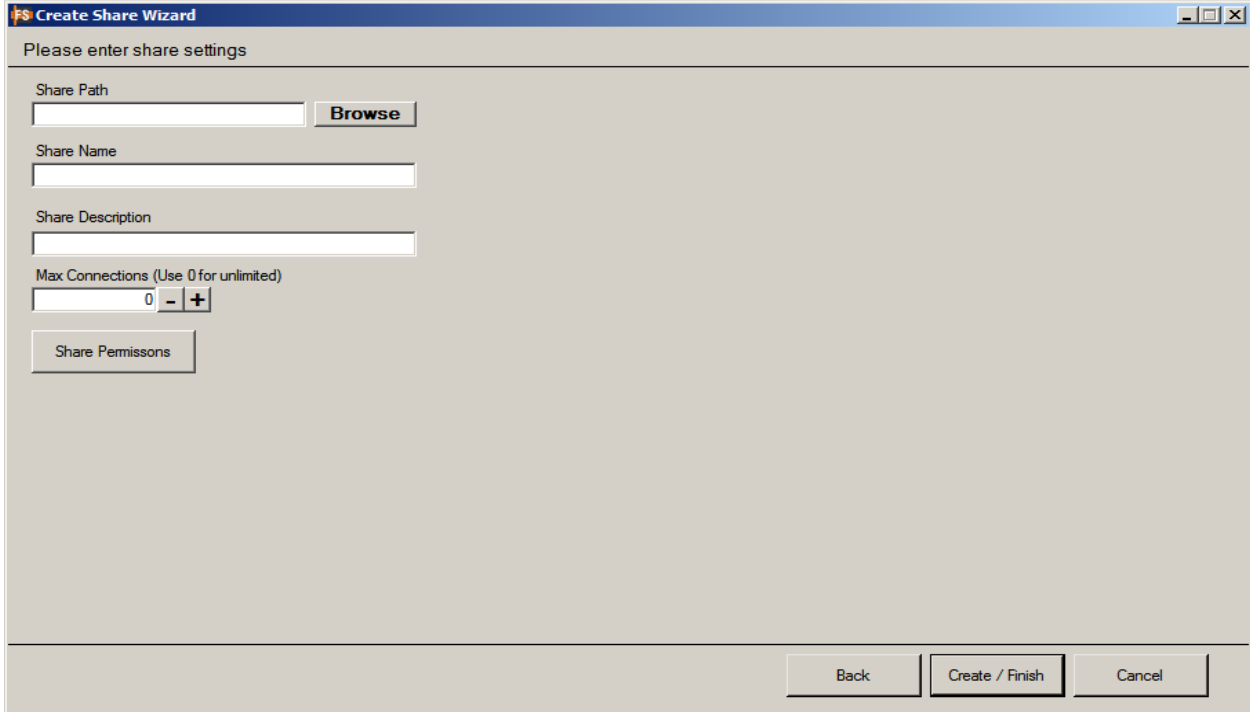
To select a server to host the new Single Server Share, click on the server and then click on the volume where you want the file share to reside.

If there are multiple Clusters configured, use the drop-down menu to select the Cluster in which the server you want to host the Single Server Share is a member and then select the server and volume where you want the file share to reside.

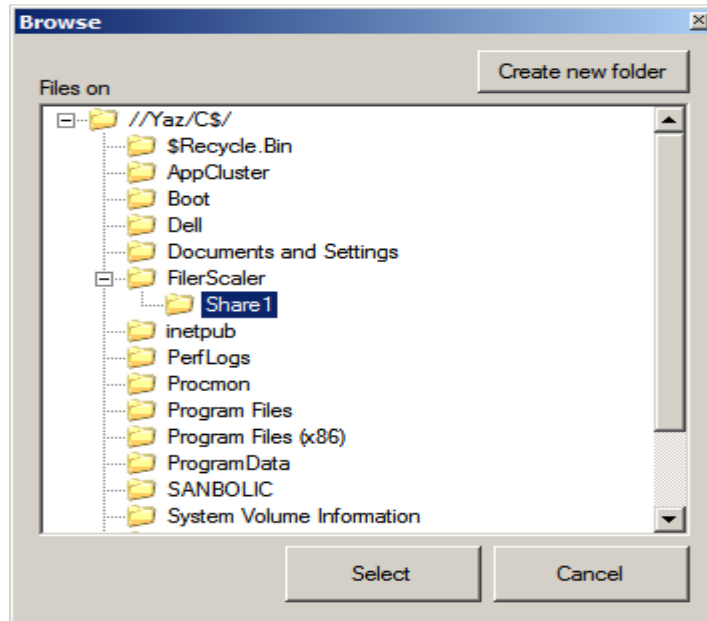


Click **Next** to continue.

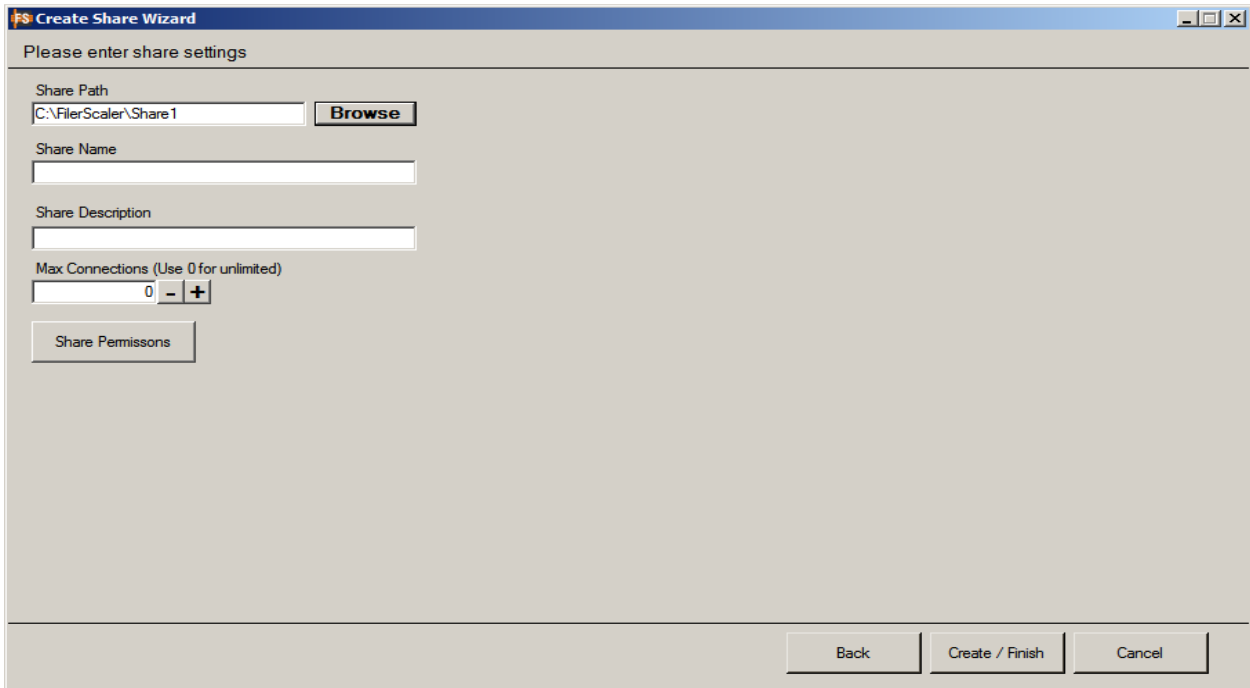
The **Share Settings** configuration window will be displayed.



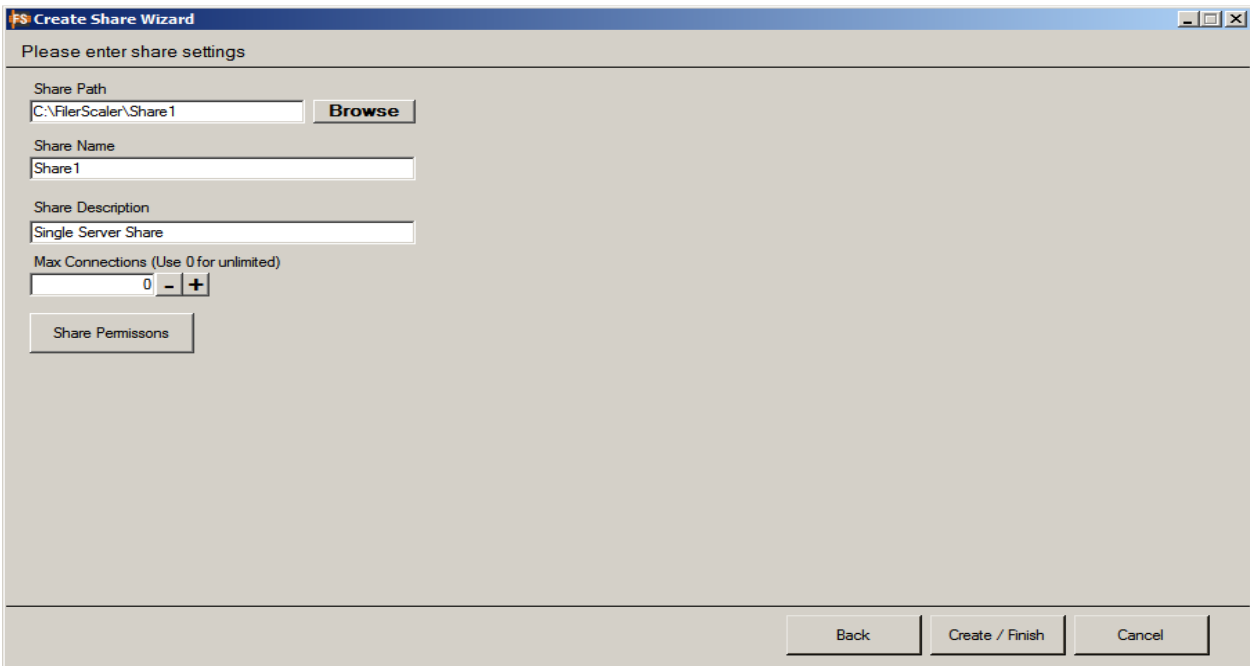
Enter the path for the new file share or click **Browse** to browse through the directories on the server to select the folder where the file share will reside and click **Select**.



The "Share Path" will point to the selected folder where the new file share will reside.

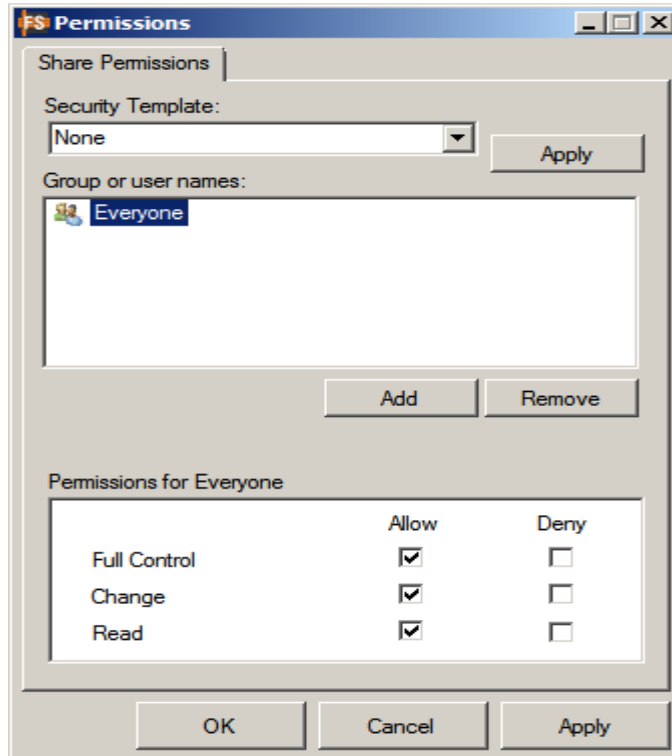


Enter a name and description for the new file share, along with the maximum number of concurrent connections allowed.

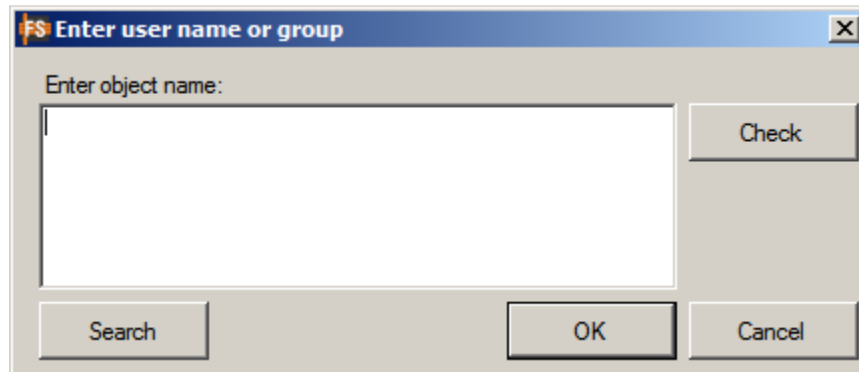


Note: Once a file share is created, you can modify the settings at anytime by right-clicking on the file share in the management console and selecting "Modify Settings".

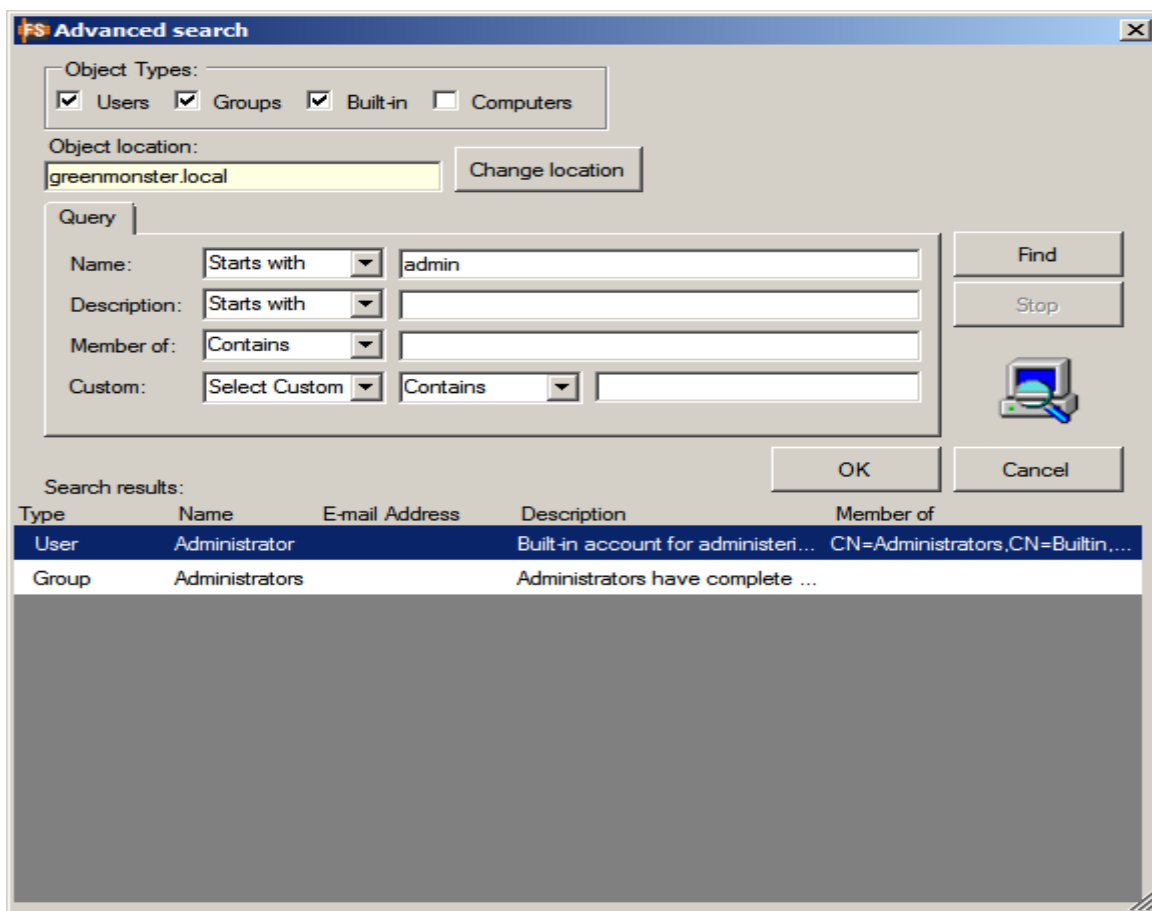
To set permissions for this Share, click **Share Permissions**.



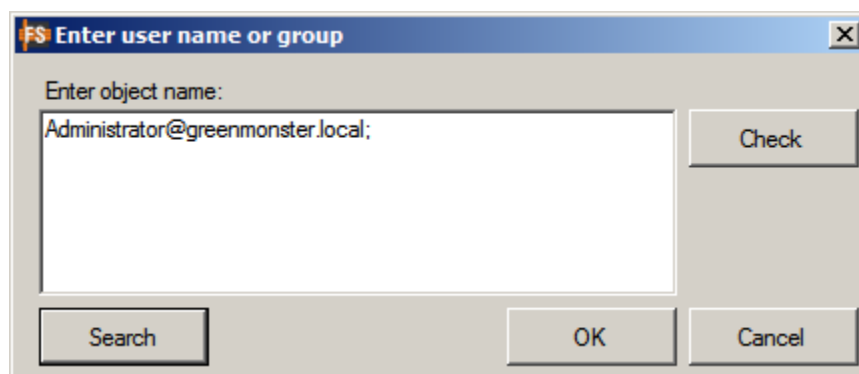
To grant access to this file share to groups and/or users that do not appear in the "Share Permissions" list by default, click **Add** to browse and select the groups and/or users you want to add to the permissions list.



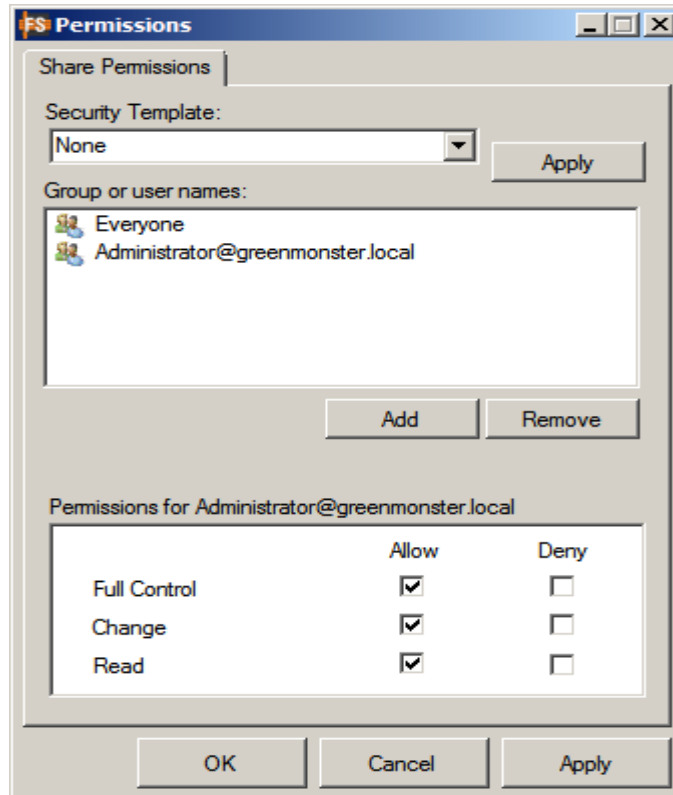
Enter the names of groups and/or users and click **Check** to confirm they exist or click **Search** to find the groups and/or users you want to add to the permissions list.



Find the names of the groups and/or users you want to add to the permissions list and click **OK**.



Click **OK** to return to the permissions list.



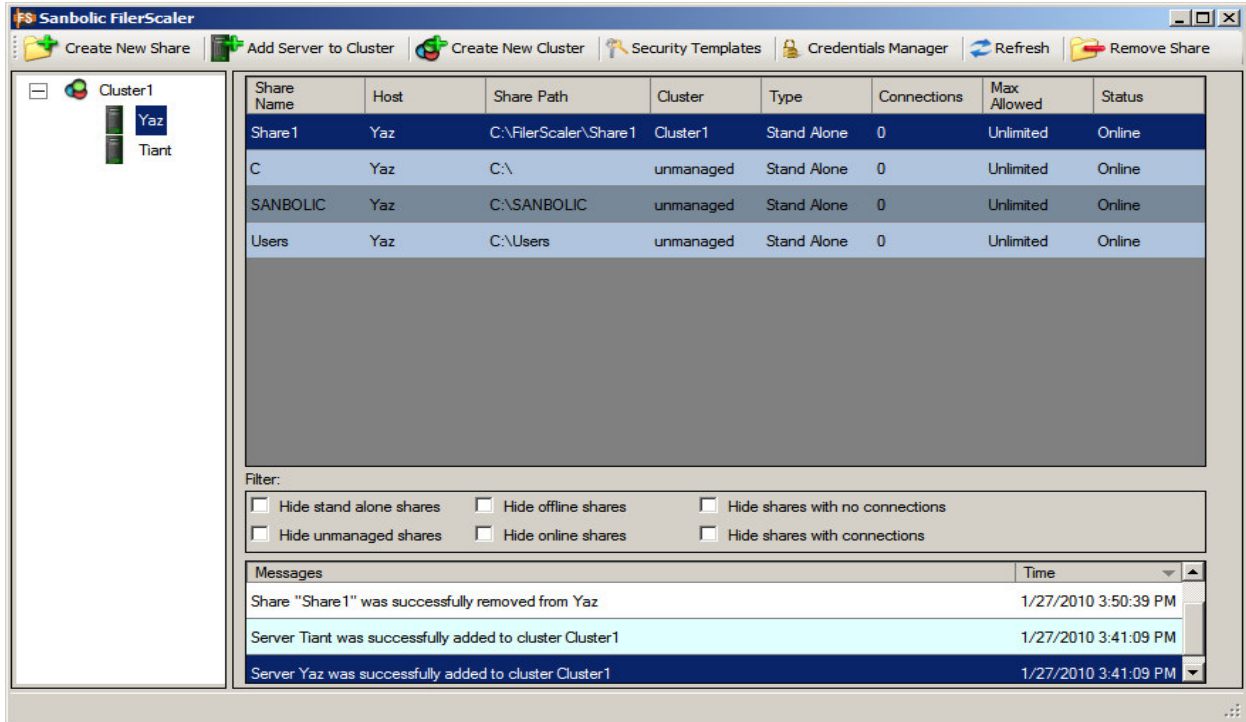
Set the permissions for the groups and/or users.

Note: To assign permissions based on a predefined Security Template, use the drop-down menu to browse through the list of security templates and click **Apply** to apply the template to the selected group and/or users. To create a template, refer to **Security Templates** on page 22.

When finished, click **Apply** at the bottom of the window to apply all changes and return to the **Share Settings** configuration window.

Click **Create / Finish** to create the new Single Server Share and close the **Share Settings** configuration window.

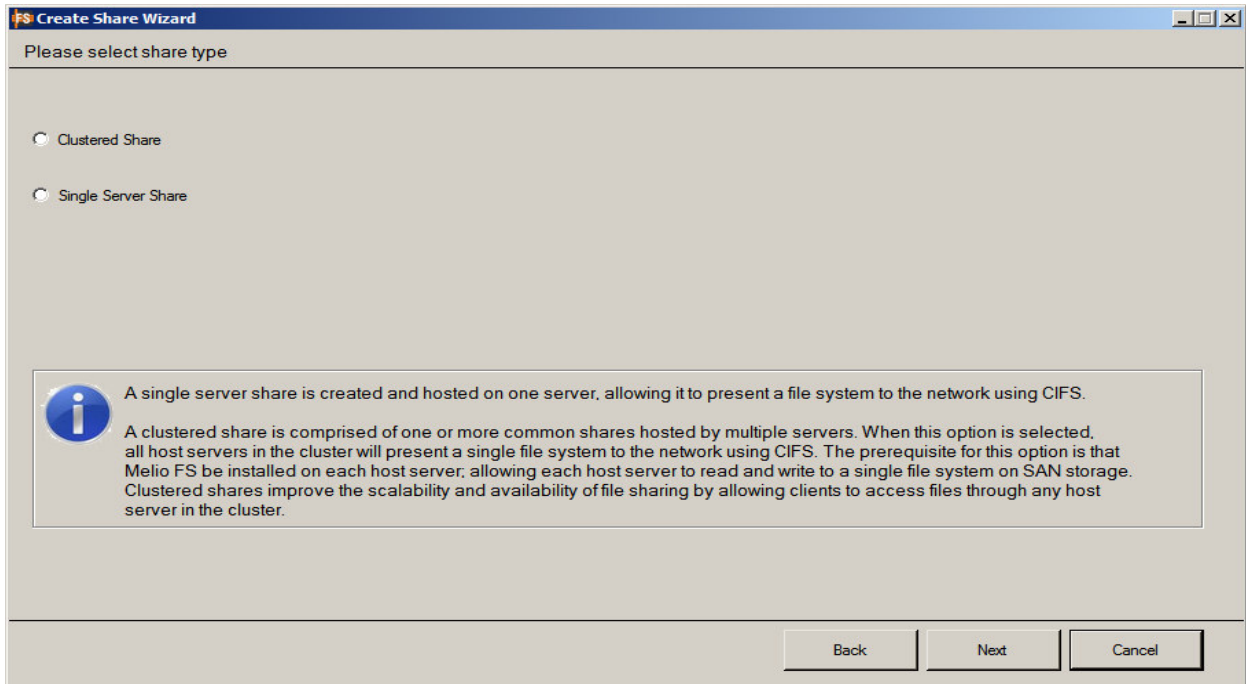
The new Single Server Share will be displayed on the right-hand side of the management console as shown on the following page.



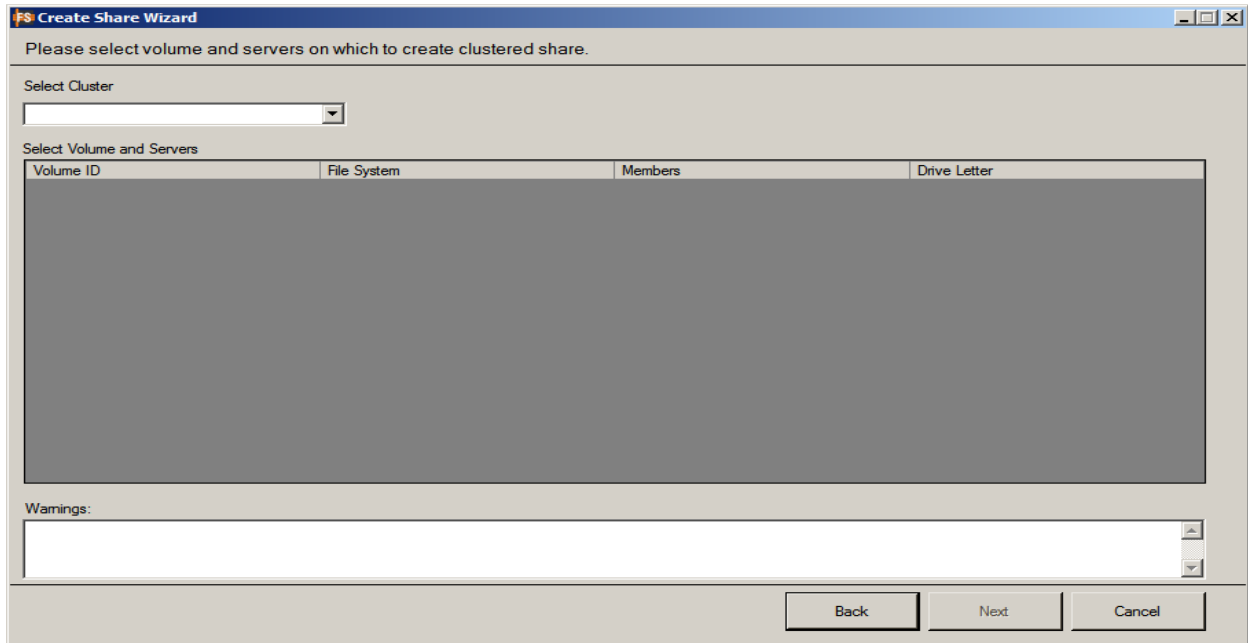
Creating a Clustered Share

To create a new Clustered Share, click **Create New Share** in the toolbar.

The following screen will appear:

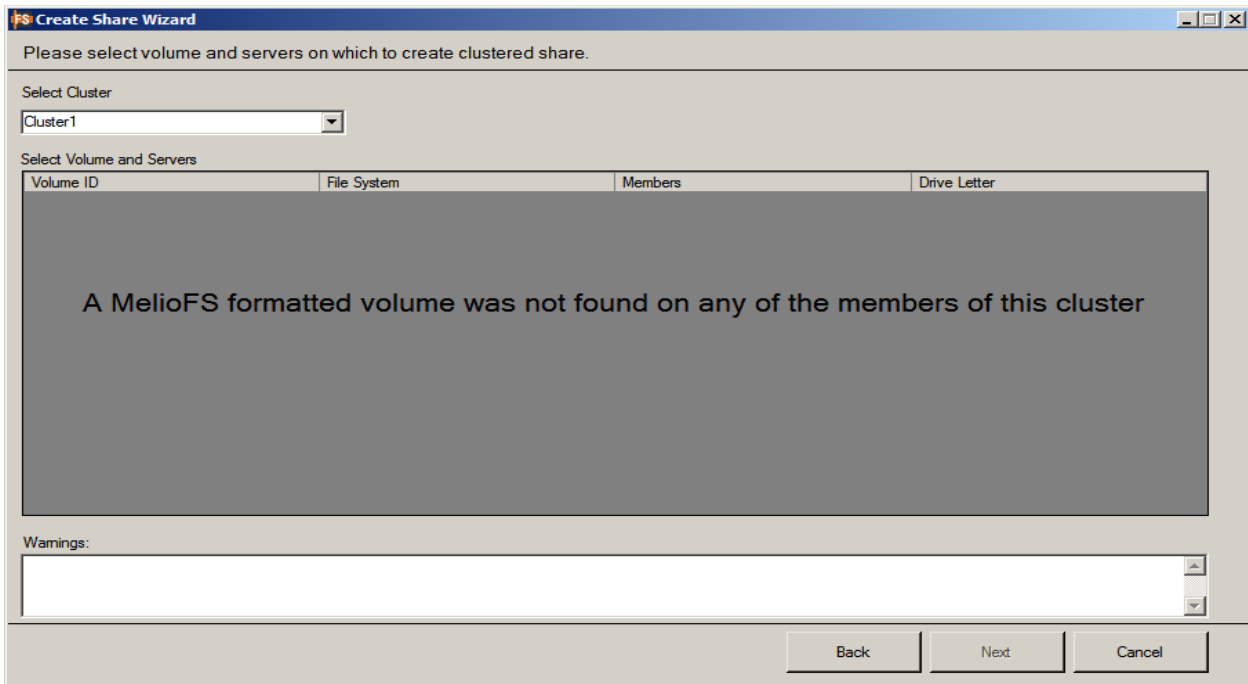


Select "Clustered Share" in the **Select Share Type** window and click **Next**.



Use the drop-down menu to select the Cluster whose servers you want to use to host the Clustered Share and then select the volume where you want the file share to reside.

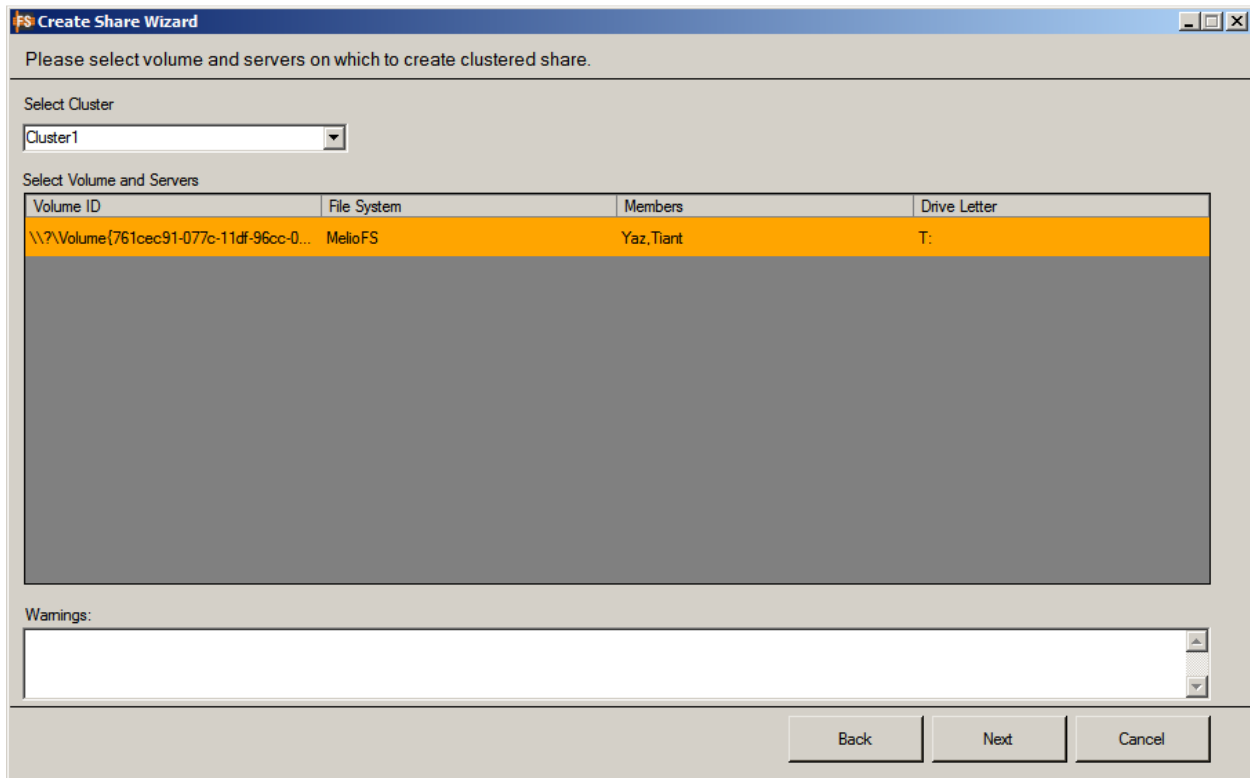
Note: A Clustered Share requires the use of a Melio shared volume to store the file share. If a Melio shared volume is not found, the following message will be displayed:



When this message appears, you have the following options:

1. Select another Cluster to host the Clustered Share.
2. Click **Back** to return to the **Select Share Type** window.
3. Click **Cancel** to close the window and return to the management console.

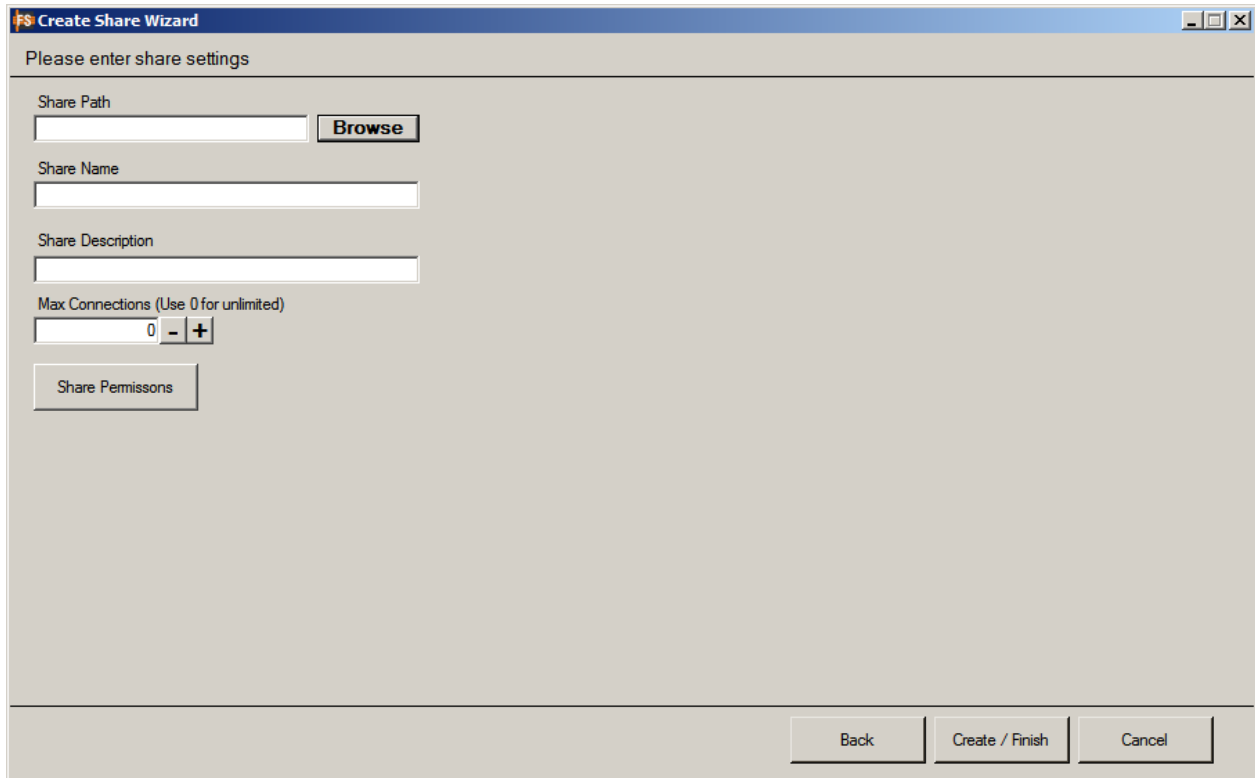
After formatting a volume with Melio FS, you can return to the **Select Share Type** window, select "Clustered Share" and create a Clustered Share on the servers sharing access to the Melio volume.



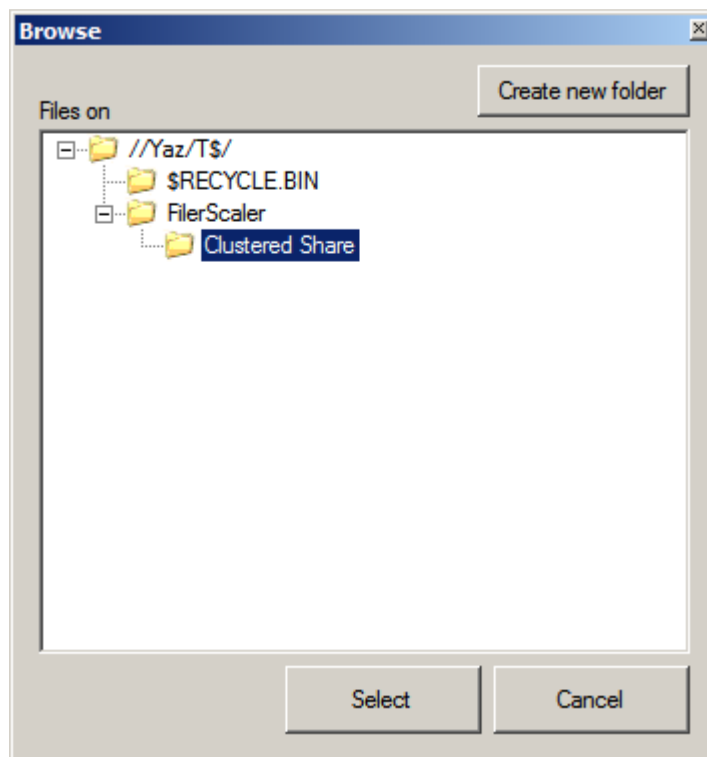
In the screen above, the T: drive is a Melio volume shared by two servers – "Yaz" and "Tiant," both of which are members of Cluster1.

Select the volume and click **Next**.

The **Share Settings** configuration window will be displayed as shown on the following page.



Enter the path for the new file share or click **Browse** to browse through the directories on the server to select the folder where the file share will reside and click **Select**.



The "Share Path" will point to the selected folder where the new file share will reside.

The screenshot shows the 'Create Share Wizard' dialog box with the following fields and controls:

- Share Path:** Text box containing 'T:\FilerScaler\Clustered Share' and a 'Browse' button.
- Share Name:** Empty text box.
- Share Description:** Empty text box.
- Max Connections (Use 0 for unlimited):** Spin box set to '0' with '-' and '+' buttons.
- Share Permissions:** Button.
- Navigation:** 'Back', 'Create / Finish', and 'Cancel' buttons at the bottom.

Enter a name and description for the new file share, along with the maximum number of concurrent connections allowed.

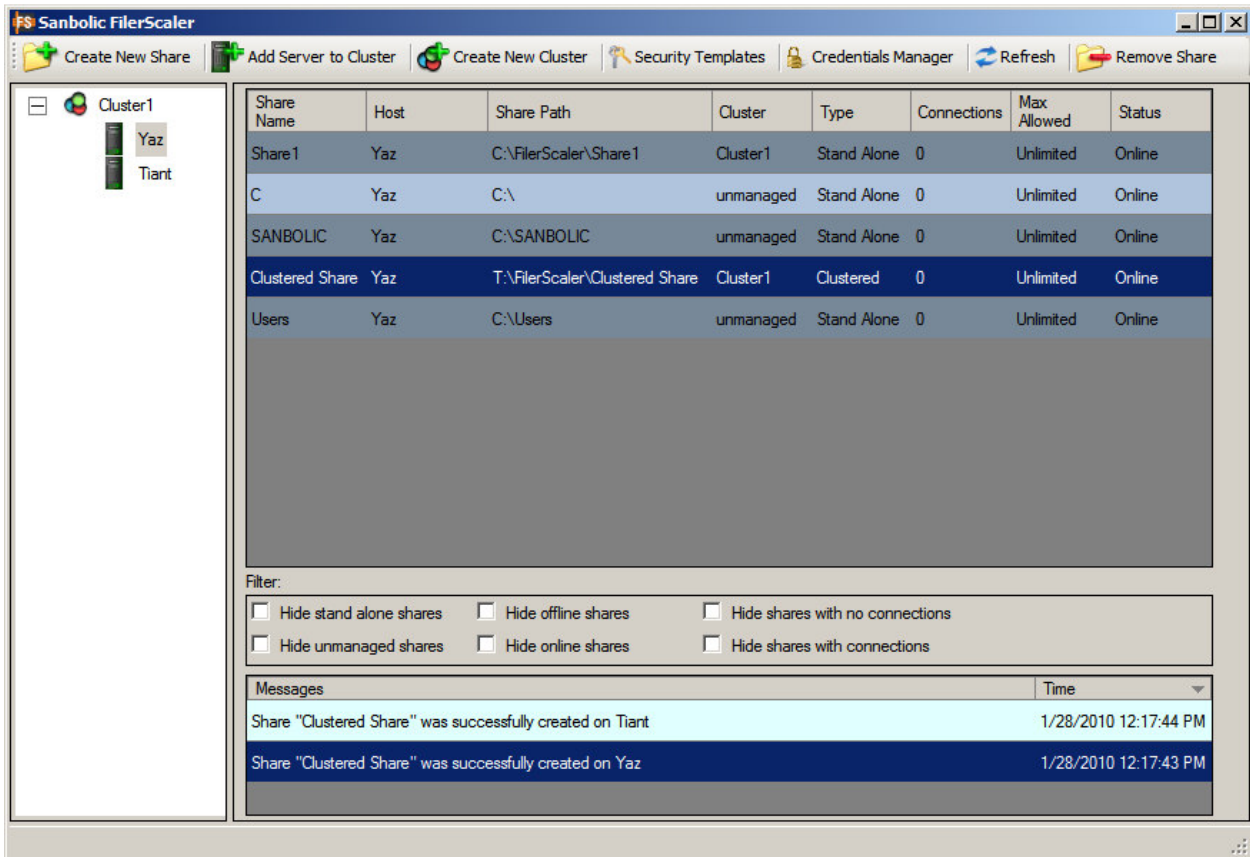
The screenshot shows the 'Create Share Wizard' dialog box with the following fields and controls:

- Share Path:** Text box containing 'T:\FilerScaler\Clustered Share' and a 'Browse' button.
- Share Name:** Text box containing 'Clustered Share'.
- Share Description:** Text box containing 'Highly Available Share'.
- Max Connections (Use 0 for unlimited):** Spin box set to '0' with '-' and '+' buttons.
- Share Permissions:** Button.
- Navigation:** 'Back', 'Create / Finish', and 'Cancel' buttons at the bottom.

To set permissions for this Share, click **Share Permissions** and perform the steps described previously for setting permissions for groups and/or users.

Click **Create / Finish** to create the new Clustered Share and close the **Share Settings** configuration window.

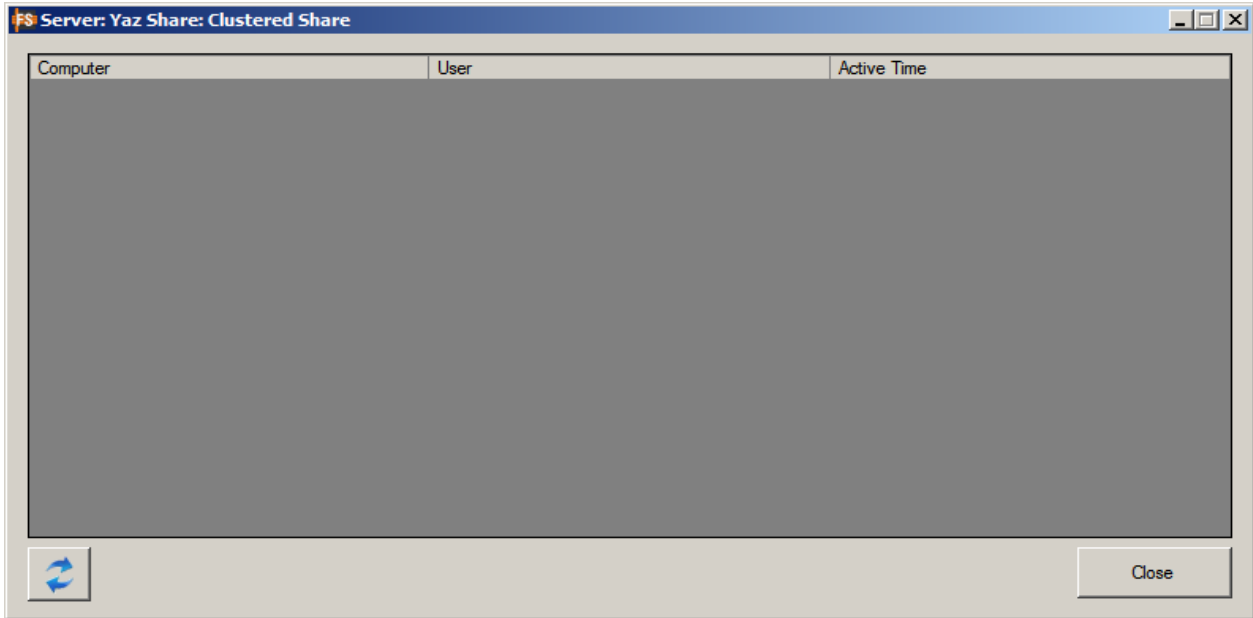
The new Clustered Share will be displayed on the right-hand side of the management console.



FilerScaler is now managing a Single Server Share named **Share1** and a Clustered Share named **Clustered Share**. **Share1** is hosted by server "Yaz," while **Clustered Share** is hosted by servers "Yaz" and "Tiant," allowing users to access this Share via either server. The benefits associated with Clustered Shares include improved performance and availability.

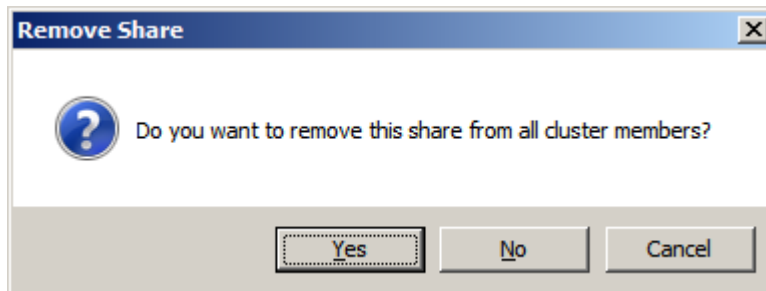
Viewing active file share connections

To see all active connections to a file share, right-click on the file share in the management console and select "View Connections". The screen on the following page will be displayed, showing the name(s) of the user(s) accessing the file share, the name of the computer each user is using to access the file share and how long each user has been connected to the file share.



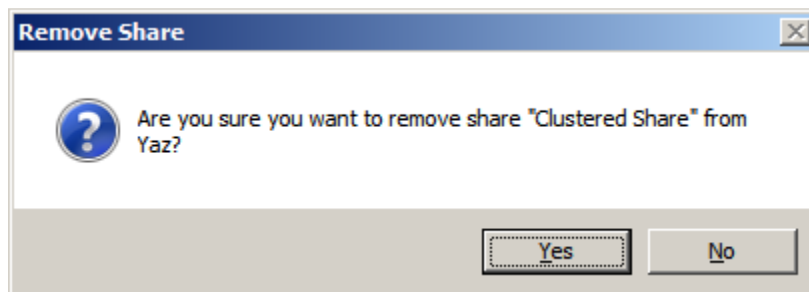
Removing file shares

To remove a file share from FilerScaler, right-click on the file share in the management console and select "Remove selected share".



Click **Yes** to remove the file share from all cluster members.

Click **No** if you only want to remove the file share from the server selected in the tree on the left-hand side of the management console.

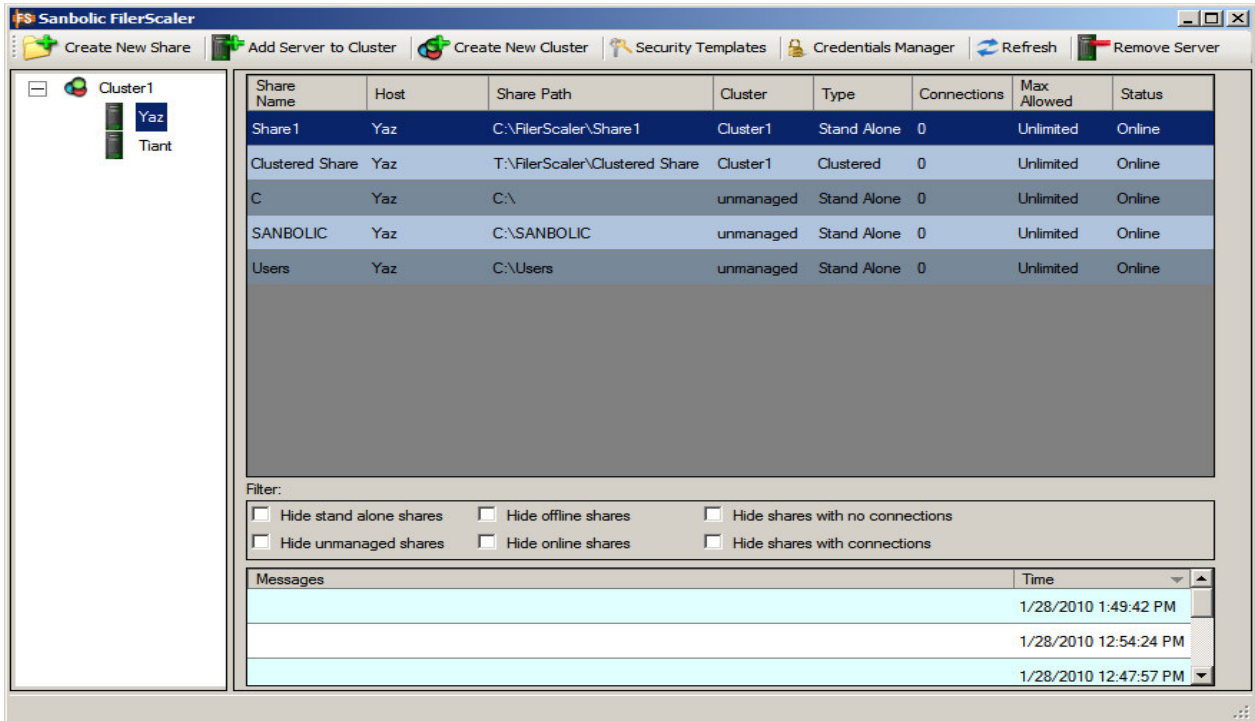


Click **Yes** to remove the file share from the specified server.

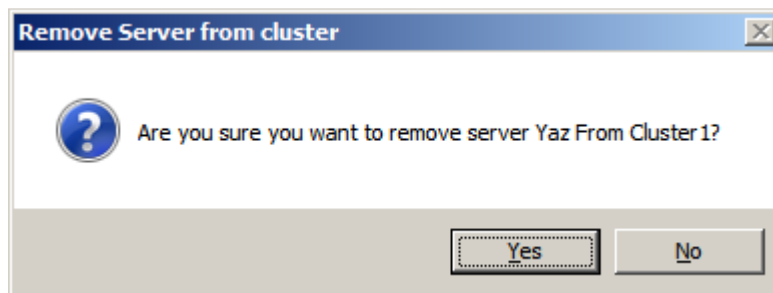
Note: The file share will continue to be hosted by the other server(s) in the file serving cluster.

Removing servers from a file serving cluster

To remove a server from a file serving Cluster, select the server on the left-hand side of the management console and click **Remove Server** in the toolbar at the top.



The following message will be displayed:

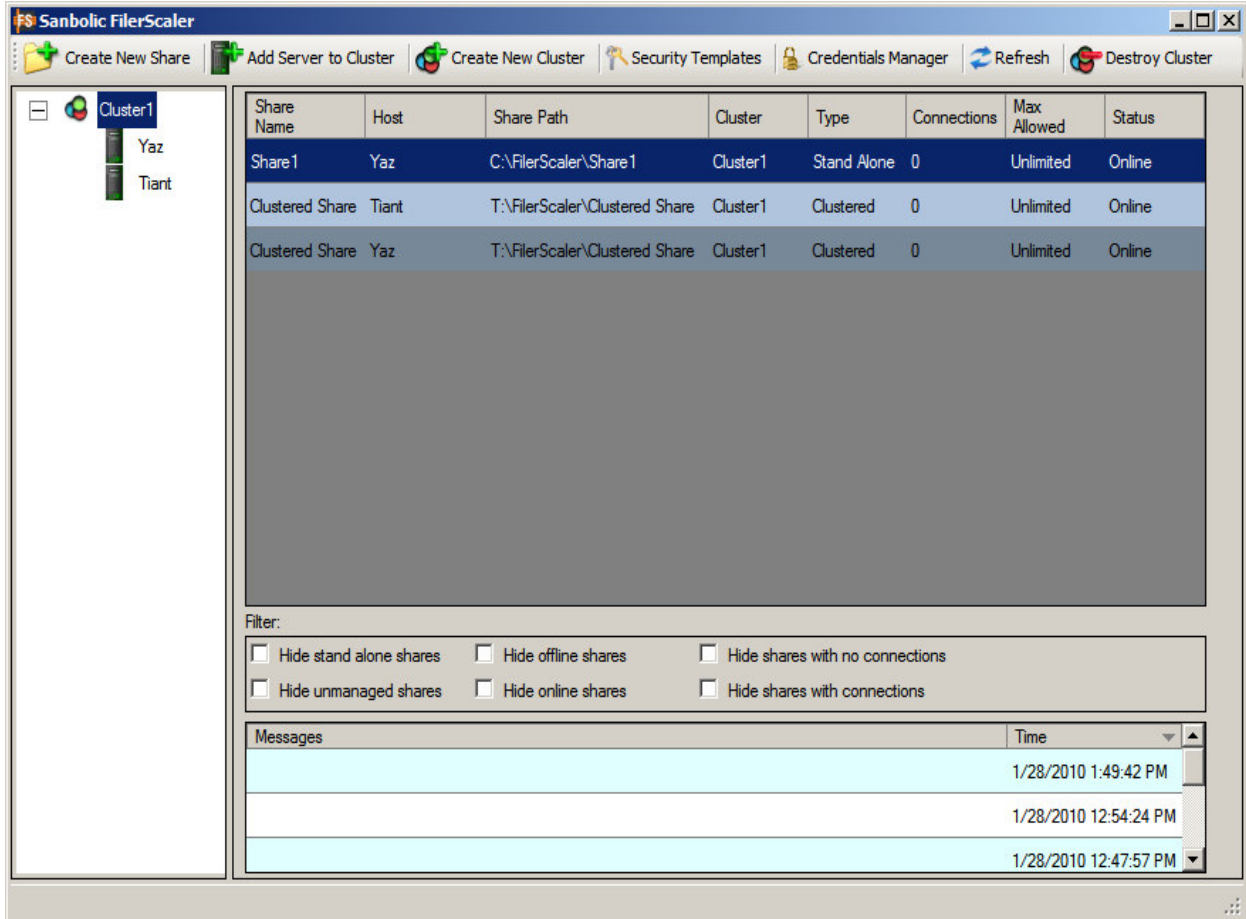


Click **Yes** to remove the server from the specified cluster.

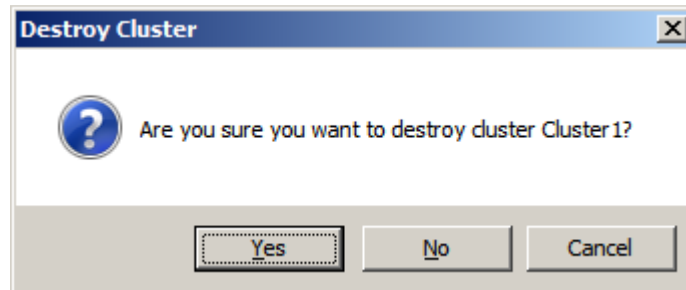
Click **No** to return to the management console.

Destroying a file serving cluster

To destroy a file serving Cluster, select the Cluster on the left-hand side of the management console and click **Destroy Cluster** in the toolbar at the top.



The following message will be displayed:



Click **Yes** to destroy the cluster.

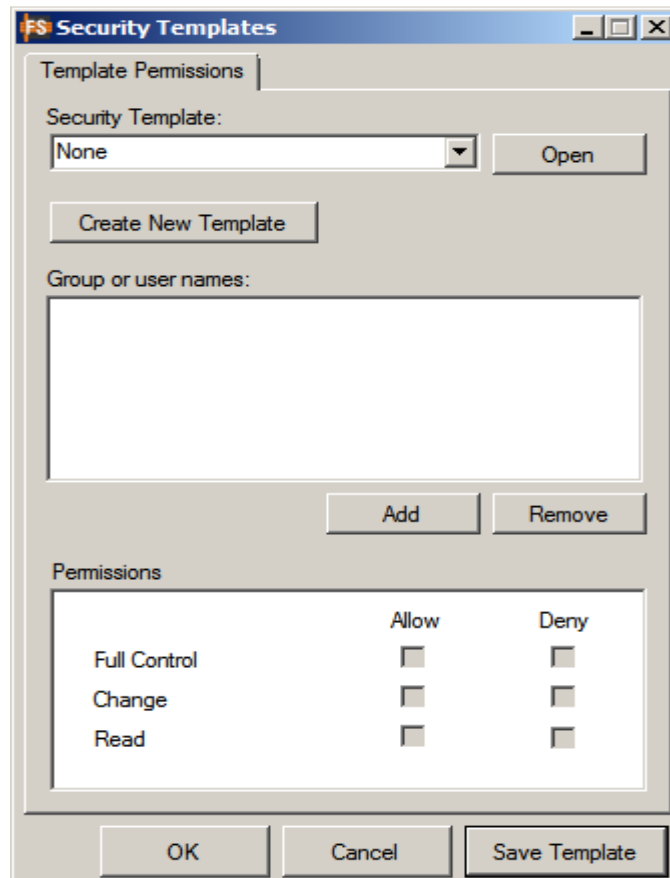
Click **No** to return to the management console.

Security Templates

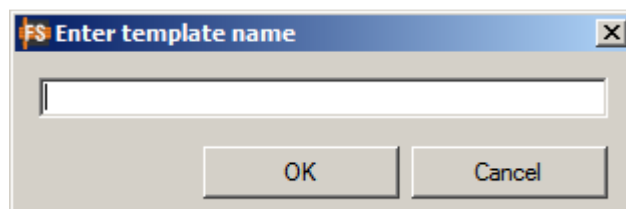
Security Templates are predefined sets of permissions that can be assigned to groups and/or users quickly and easily.

To create/change/delete security templates, click **Security Templates** in the toolbar at the top of the management console.

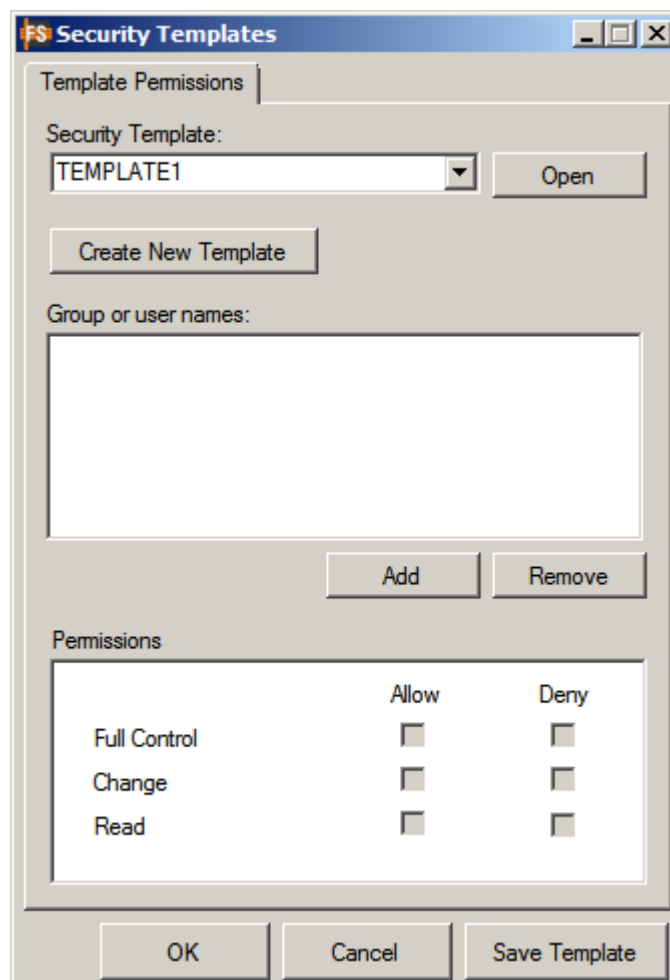
The following screen will be displayed:



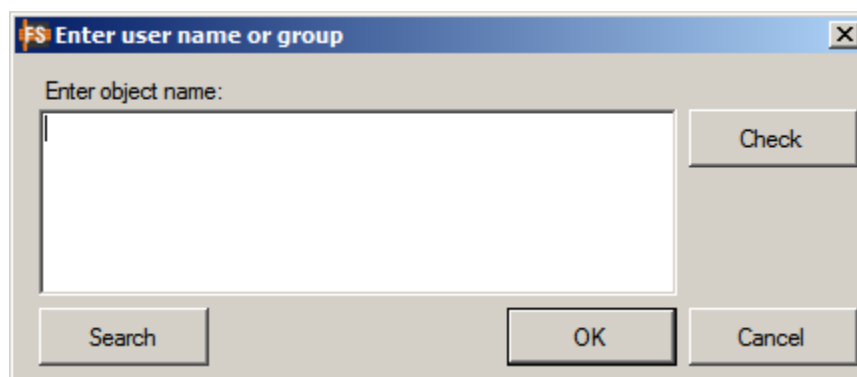
Click **Create New Template** to create a new template.



Enter a name for the new template and click **OK**.



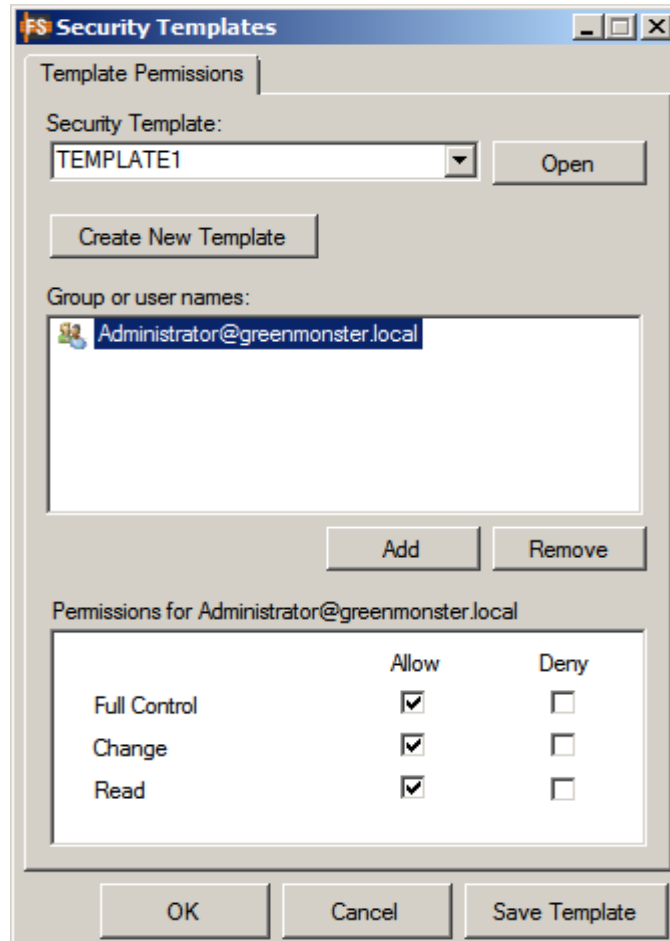
Click **Add** to add groups and/or users to the permissions list for this template.



Enter the names of groups and/or users and click **Check** to confirm they exist or click **Search** to find the groups and/or users you want to add to the permissions list.

Click **OK** to add the groups and/or users to the permissions list.

Select a group and/or user and set their permissions.



Click **Save Template** to create the new template.

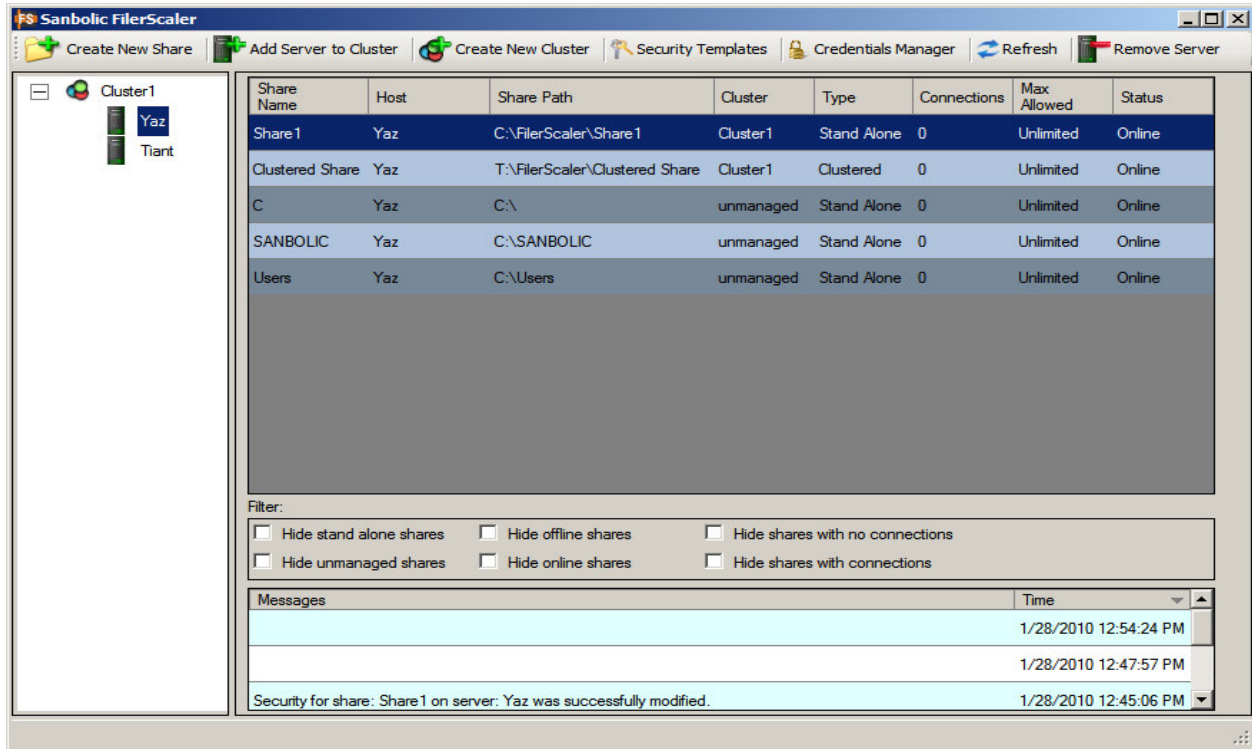
Click **OK** to close the **Security Template** configuration window and return to the management console.

When you create new file shares, you can either assign permissions to groups and/or users individually or select and apply a Security Template, which includes specific groups and/or users and their pre-assigned permissions.

You can also assign a Security Template to an existing file share by right-clicking on the file share in the management console and selecting "Modify Security". In the **Share Permissions** configuration window, use the drop-down menu to select the Security Template you want to apply to this file share and click **Apply**. The permissions for this file share will be modified based on the permissions defined in the selected Security Template.

Filters

Below the list of file shares is a window titled "Filters". This window allows you to control what file shares are displayed in the management console.



Stand alone shares: File Shares hosted by a single server.

Unmanaged shares: File Shares that have been discovered, but are not managed by FilerScaler.

Offline shares: File Shares currently inaccessible.

Online shares: File Shares currently accessible.

Shares with no connections: File Shares currently not being accessed by users.

Shares with connections: File Shares currently being accessed by users.

Messages

At the bottom of the management console is a window titled "Messages". This window displays a list of operations performed by FilerScaler and the time the operations took place. For a history of events, you can use the scroll bar located on the right-hand side to see all the operations performed by FilerScaler.

Refreshing the management console

Click **Refresh** in the toolbar at the top to refresh the view of the management console.

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