NTP Software File Reporter™

User Manual

Version 7.5 - September 2015

This guide details the use of NTP Software File Reporter™. Upon completion of the steps within this document, NTP Software File Reporter will successfully report on your enterprise community.

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Executive Summary

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

NTP Software File Reporter provides a complete view of storage consumption within enterprise organizations. Providing reports on users, files, directories, volumes, sites, mailbox folders, and servers across your entire organization, NTP Software File Reporter is the premiere enterprise reporting application. By using the NTP Software File Reporter drill-down filtering technology, administrators can focus on the most important and growing concerns within their enterprise environments.

NTP Software File Reporter reports on enterprise storage resources; for example, some of the built-in reports display data related to the following:

- End-user storage consumption
- File type utilization
- Prediction and trend analysis

NTP Software File Reporter is different from all other storage-reporting applications in several important ways. In particular, it has the lowest labor cost, which industry analysts agree represents 75% or more of total cost of ownership (TCO). To assist with lowering costs, NTP Software provides and supports multiple installation methods for NTP Software File Reporter, including Microsoft® SMS installations, MSI installations, and Active Directory group policy object installations. NTP Software File Reporter supports virtually any installation method your organization customarily uses.

Installation

For installation instructions, please refer to the following:

- *Installation Guide – NTP Software File Reporter Analysis Server _4464EF* for details about installing NTP Software File Reporter™ Analysis Server.
- *Installation Guide – NTP Software Data Collection Agent for Active Directory_4458EF* for details about installing NTP Software Data Collection Agent for Active Directory.
- *Installation Guide – NTP Software Data Collection Agent for Windows_4463EF* for details about installing NTP Software Data Collection Agent Windows Version.
- *Installation Guide - NTP Software Data Collection Agent for NAS NetApp®_4461EF* for details about installing NTP Software Data Collection Agent for NAS, NetApp Edition.
- *Installation Guide - NTP Software Data Collection Agent for NAS EMC®_4460EF* for details about installing NTP Software Data Collection Agent for NAS, EMC Edition.
- *Installation Guide – NTP Software Data Collection Agent for SharePoint Server_4462EF* for details about installing NTP Software Data Collection Agent for SharePoint Server.
- *Installation Guide – NTP Software Data Collection Agent for NAS EMC® Isilon_4595EF* for details about installing NTP Software Data Collection Agent for NAS, EMC Isilon Edition.

This guide covers two main topics: configuring NTP Software Data Collection Agent™ and configuring and managing NTP Software File Reporter.

In This Guide

The screenshots within the user manual do not necessarily reflect your environment. The screenshots here are meant to reflect all Data Collection Agents supported with NTP Software File Reporter.

NTP Software Data Collection Agent Administration

NTP Software Data Collection Agent™ is a critical component of an overall file data management (FDM) architecture and is part of the NTP Software integrated suite of products. Together, these products are designed to help organizations control and report on their current and ever-growing storage infrastructure.

The NTP Software File Reporter supports the following Data Collection Agents:

- NTP Software Data Collection Agent for NAS, NetApp Edition
- NTP Software Data Collection Agent for NAS, EMC Edition
- NTP Software Data Collection Agent Windows Version
- NTP Software Data Collection Agent for SharePoint Server Edition
- NTP Software Data Collection Agent for Active Directory Edition
- NTP Software Data Collection Agent for NAS, EMC Isilon Edition

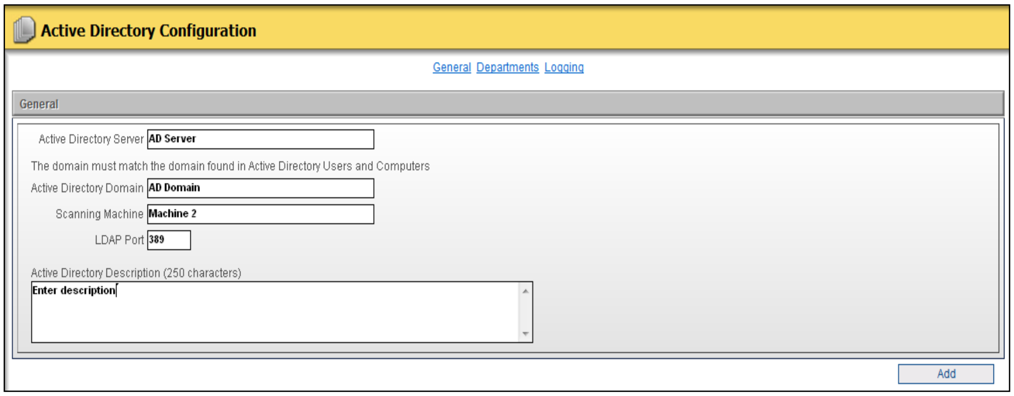
NTP Software Data Collection Agent Configuration

Depending on the platform adapted in your environment, you will have to configure one type of NTP Software Data Collection Agent from the list above. Before using NTP Software Data Collection Agent, the new configuration settings must be created for each storage unit (Filer®, VNX, etc.) that the agent will scan. Follow these steps to create a new configuration:

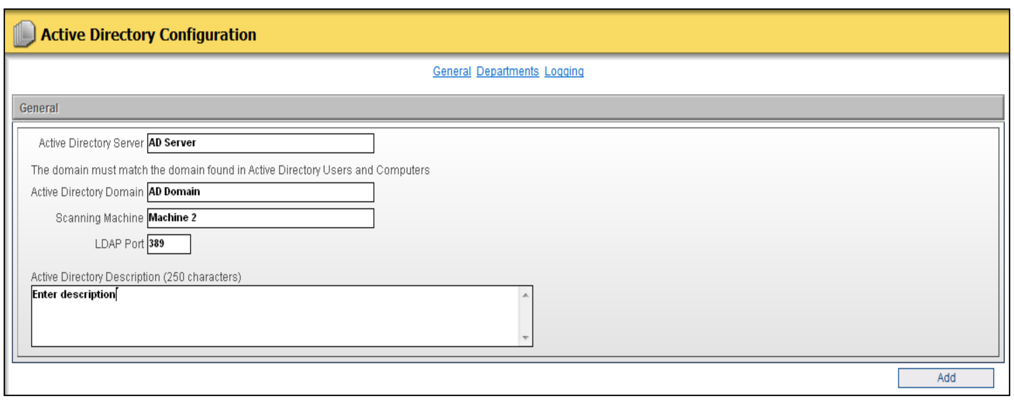
Configuring New Active Directory Server

1. From the NTP Software File Reporter™ Analysis Server machine, open the NTP Software Data Collection Agent™ Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter** > **NTP Software File Reporter Data Agent Administration**.

2. In the left-hand main menu, click **New AD Configuration** to open the **Active Directory Configuration** window.

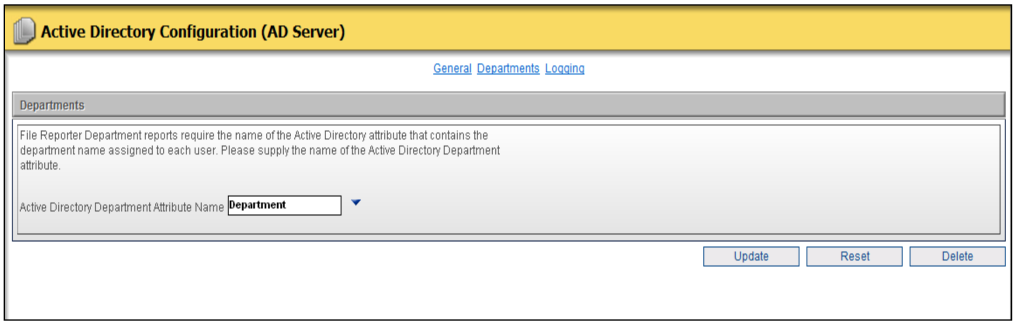


3. In the **General** dialog box, enter the AD server, AD domain, scanning machine, LDAP port, and description (if desired) and then click the **Add** button.



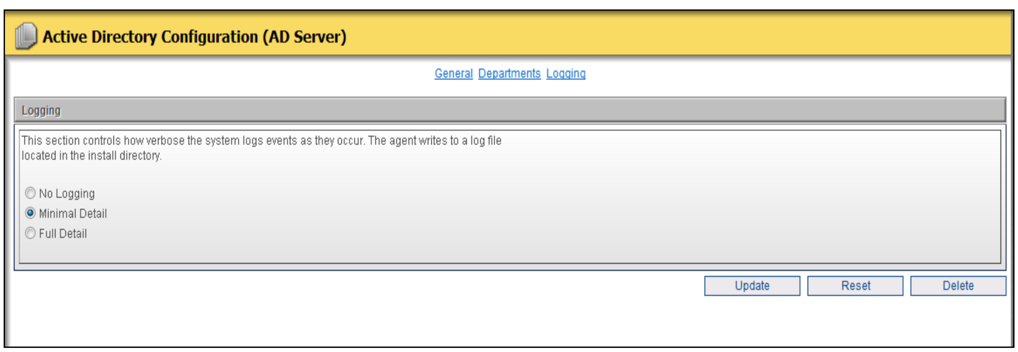
4. From the **Home** page, under the **Active Directory Configurations** section, click the **AD server** name you want to update/configure.

5. In the **Departments** dialog box, enter the **Active Directory Department** attribute name and then click the **Update** button.



6. In the **Logging** dialog box, specify how you want the system to log events as they occur. Select any of the logging options and then click the **Update** button.
   - No Logging: Prevents logging events to the log file.
   - Minimal Detail: Logs a few event details to the log file.
   - Full Detail: Logs all the details to the log file.

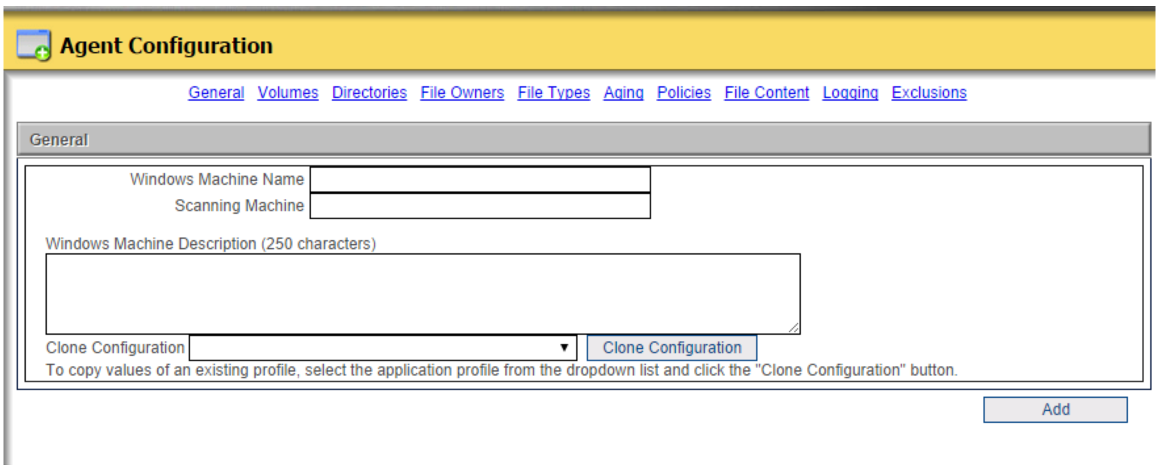
NOTE: The agent writes to a log file located in the install directory.



Configuring NTP Software Data Collection Agent for Windows

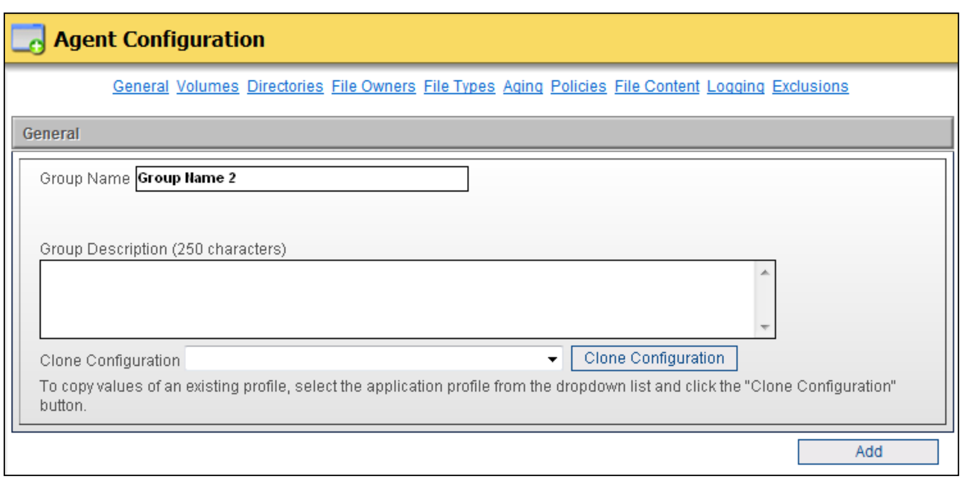
1. From the NTP Software File Reporter™ Analysis Server machine, open the NTP Software Data Collection Agent™ Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter** > **NTP Software File Reporter Data Agent Administration**.

2. In the left-hand main menu, click **New Windows Configuration** to open the Agent Configuration window.



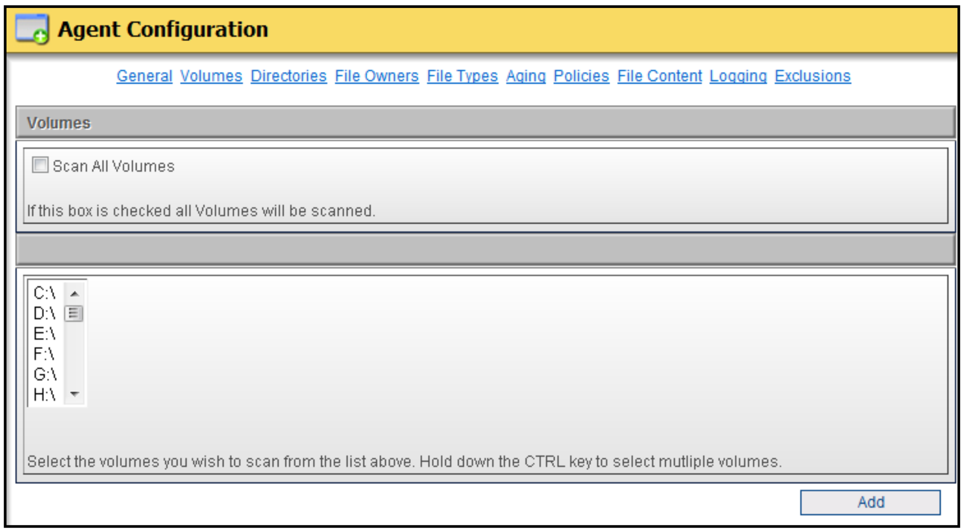
3. In the **General** dialog box, enter the Windows Server Name which will be scanned, and the name of the Scanning machine (a Windows server with NTP Software Data Collection Agent, Windows Edition installed) and a description (if desired) and then click the **Add** button.

NOTE: To copy values of an existing profile, select the application profile from the **Clone Configuration** dropdown list and then click the **Clone Configuration** button.



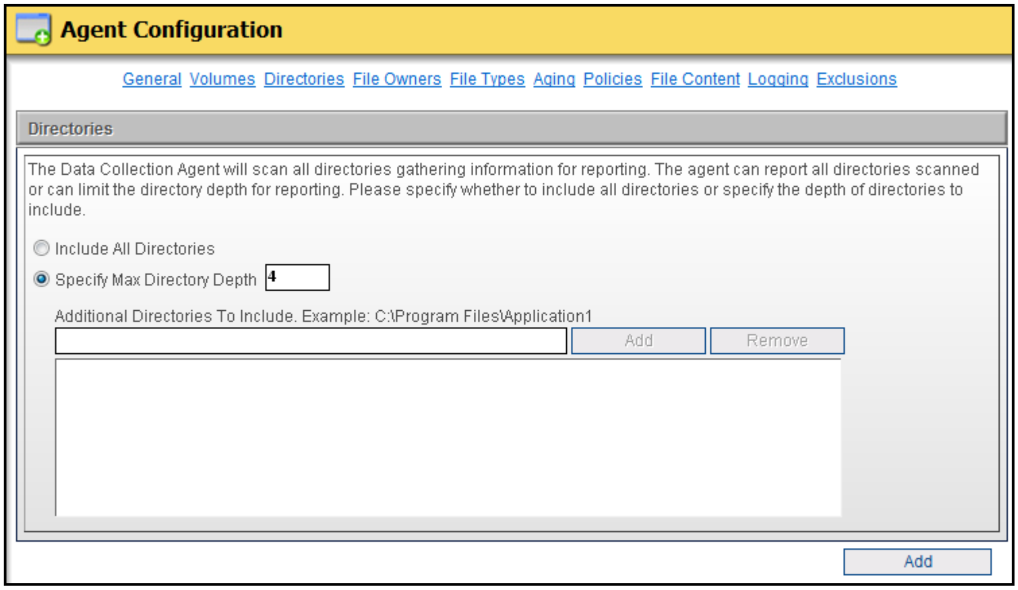
4. From the **Home** page, under the **Windows Configurations** section, click the group name of the **Windows Configuration** you want to update/configure.
5. In the **Volumes** dialog box, select the resources you want to include in the data scan and then click the **Add** button.

NOTE: To include all the volumes in the scanning operation, click the **Include all Volumes** checkbox.



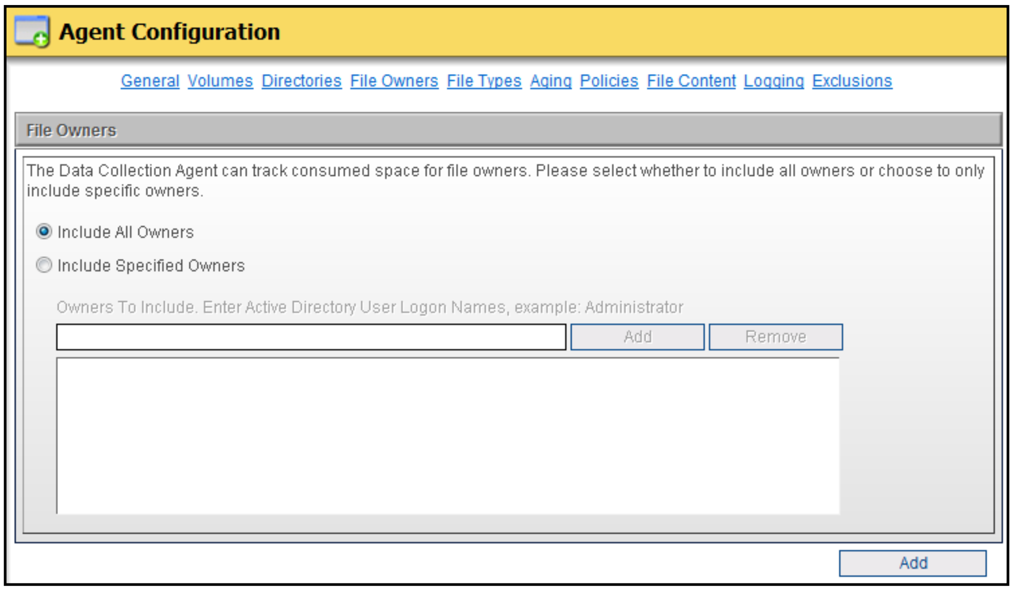
6. In the **Directories** dialog box, click the **Include All Directories** check box if you want the agent to report all directories scanned. Click the **Update** button.

NOTE: You still can limit the directory depth; in this case, you need to specify a depth value at which directories will be included to minimize your Database size. The agent will still scan all the directories on the specified volumes.



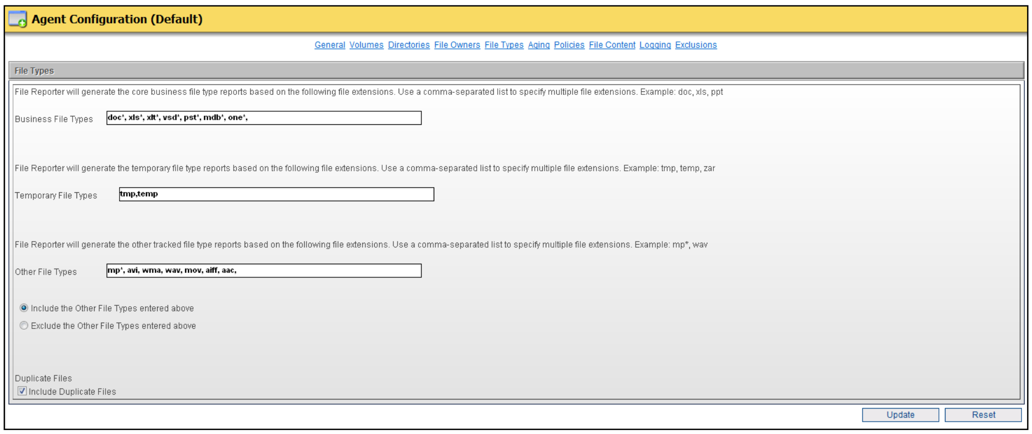
7. In the **File Owners** dialog box, click the **Include All Owners** checkbox to let the agent track consumed space for all file owners during the scan. Click the **Update** button.

> **NOTE:** You still can choose to include only specific owners; click the **Include Specified Owners** checkbox to minimize your Database size (use the **Add** and **Remove** buttons to add/remove owners to/from the list). The agent will still scan all files owned by all file owners for the specified volumes.

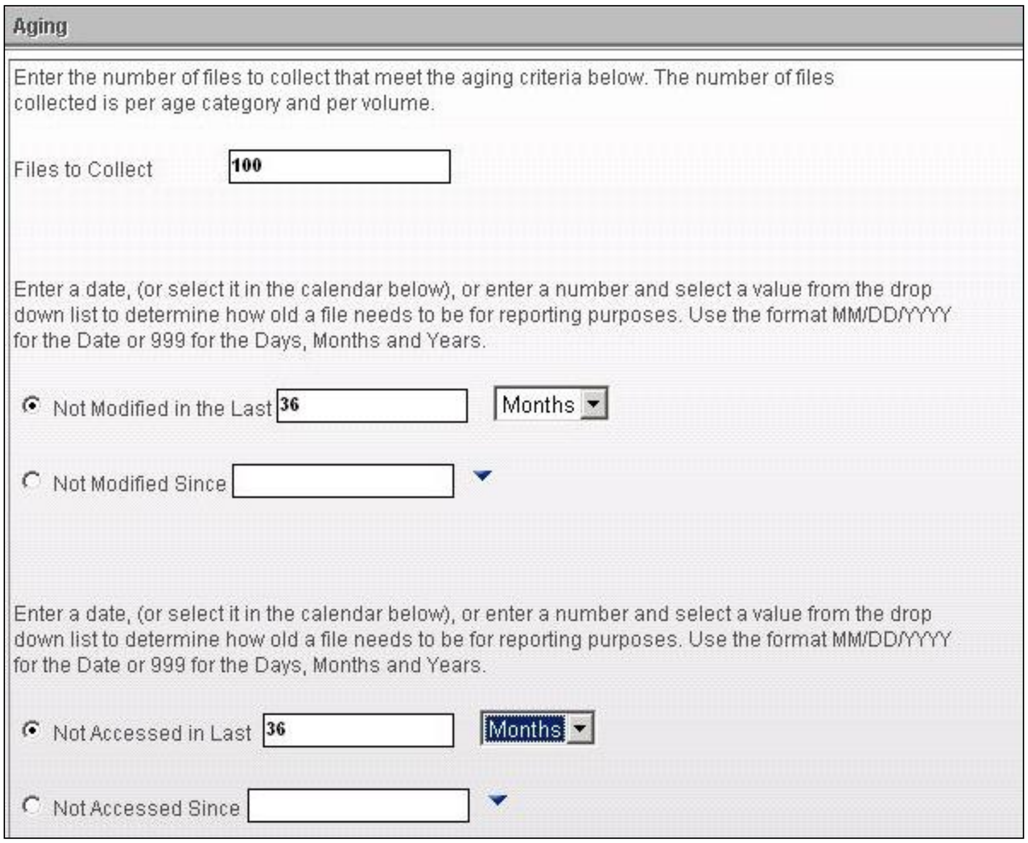


8. In the **File Types** dialog box, enter the file extensions you want to include in the business file types, temporary file types, and other file types during the scan. Click the **Update** button.

   > **NOTE:** You can select to include/exclude other file types entered or select to include/exclude duplicate files.

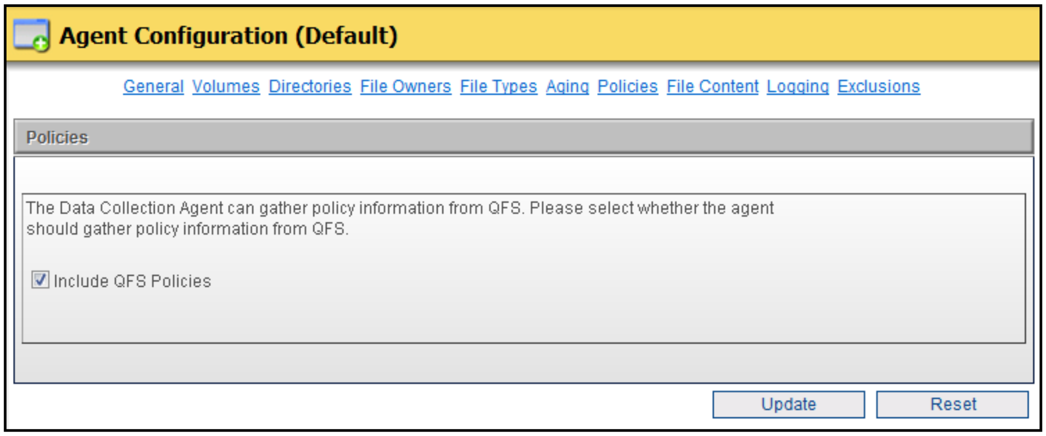


9. In the **Aging** dialog box, set the number of files to collect per age category and per volume. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old a modified file needs to be for reporting purposes. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old an accessed/not accessed file needs to be for reporting purposes. Click the **Update** button.



10. In the **Policies** dialog box, specify whether you want to include/exclude your NTP Software QFS® policy information in the NTP Software File Reporter™ reports.

NOTE: NTP Software QFS must be installed on an NTP Software Data Collection Agent server to report policy information for that server.

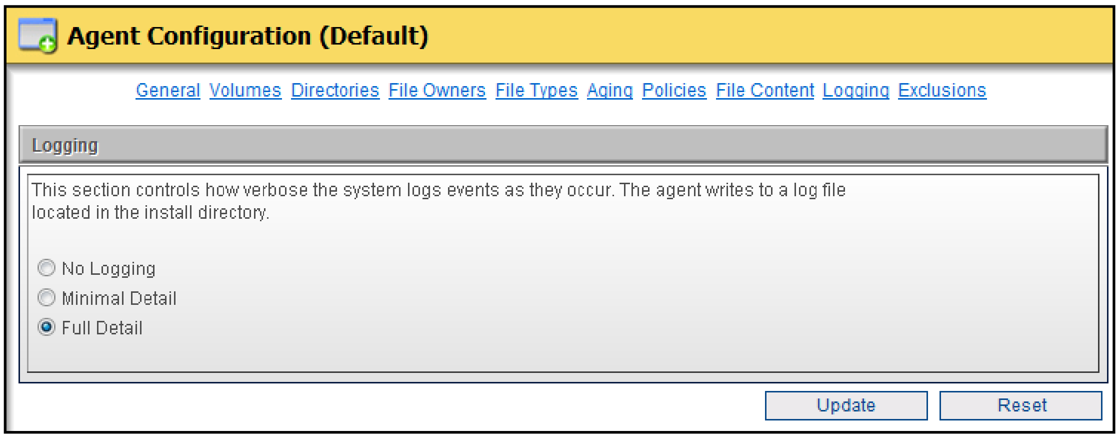


11. In the **File Content** dialog box, check the **Scan File Content** checkbox to be able to specify the file content search options. Search options include browsing to a desired .csv file containing search words or choosing from standard content types; specifying the file types/file names/file locations to be searched; and including/excluding binary files. Please check the [Data Agent Administration Web Application Settings for Content Scanning]() for further explanation.

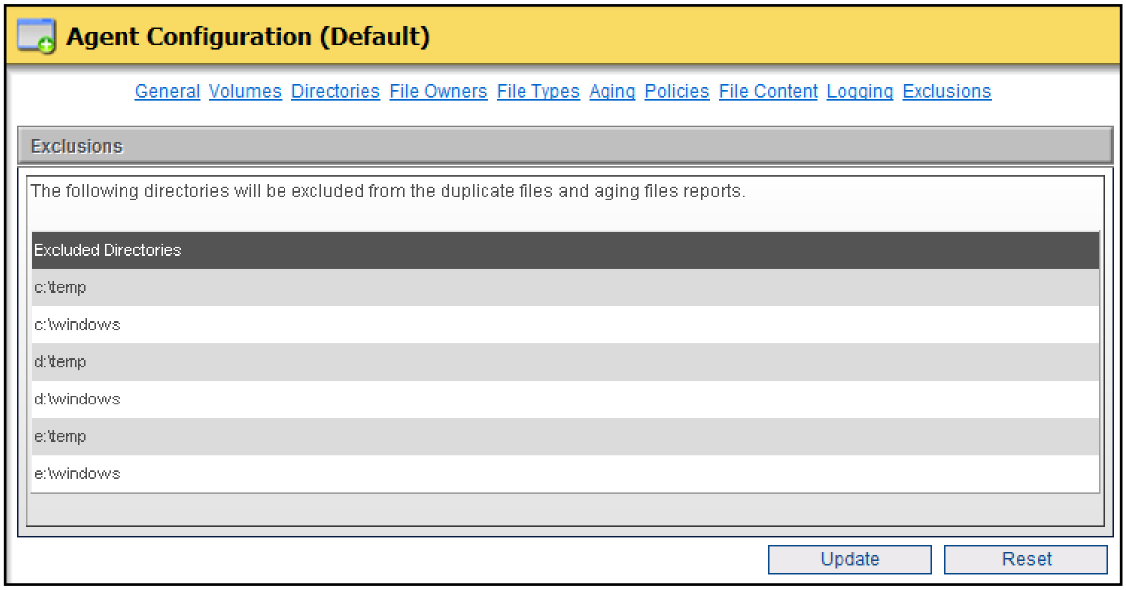
12. In the **Logging** dialog box, specify how you want the system to log events as they occur. Select any of the logging options and then click the **Update** button.

- No Logging: Prevents logging events to the log file.
- Minimal Detail: Logs a few event details to the log file.
- Full Detail: Logs all the details to the log file.

NOTE: Enabling logging will enter events into the DataAgent_<machine name>_YYYY_MM_DD.log file found in the install directory. This feature is very useful for troubleshooting purposes.



13. In the **Exclusions** dialog box, you can see the directories that will be excluded from the Duplicate Files and Aging Files reports. These default directories are areas in which the server and administrator create files. Click **Update** to save your changes when the configuration is complete.

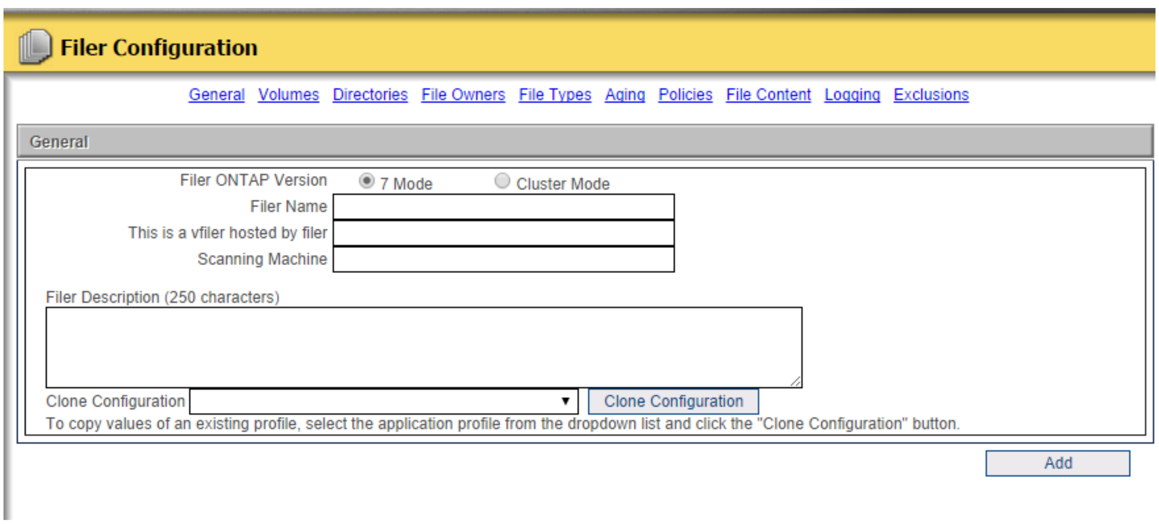


Configuring NTP Software Data Collection Agent for NAS, NetApp

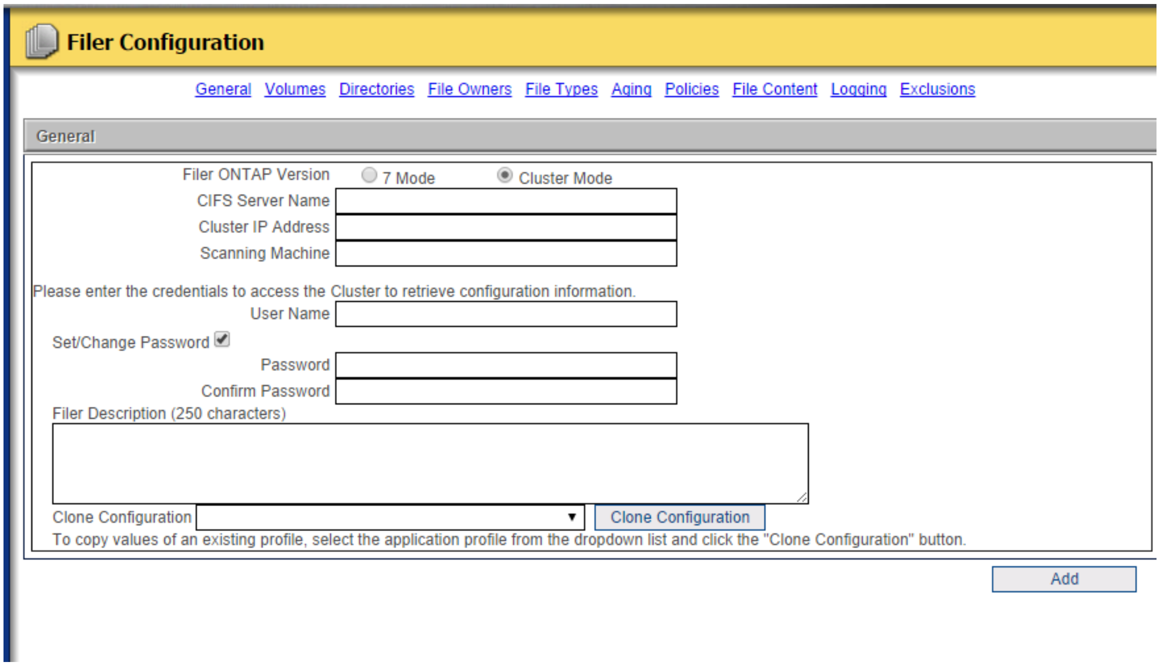
1. From the NTP Software File Reporter Analysis Server machine, open the NTP Software Data Collection Agent Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter™** > **NTP Software File Reporter Data Agent Administration**.
2. In the left-hand main menu, click **New Filer Configuration** to open the **Filer Configuration** window.
3. Specify the Filer type: (Cluster-Mode or 7-Mode)
4. Fill the information required.
5. In the **General** dialog box, enter the Filer name and other information required along with the Filer description (if desired) and then click the **Add** button.

> **NOTE:** To copy values of an existing profile, select the application profile from the **Clone Configuration** dropdown list and then click the **Clone Configuration** button.

7-Mode Configuration



Cluster-Mode Filer configuration:

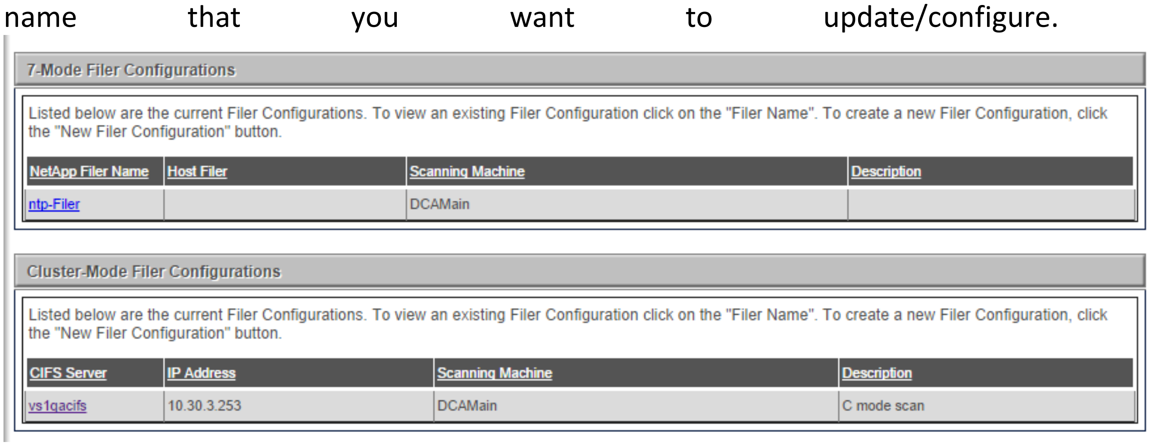


For cluster-mode filers, enter the name of your CIFS server, preferred connector IP address, cluster IP address, user name and password for account on the cluster.

The account entered must be a local account on the cluster and has admin role for the ontapi application. Use the following command to create this user:

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

6. From the **Home** page, under the **Filer Configurations** section, click the Filer® name that you want to update/configure.

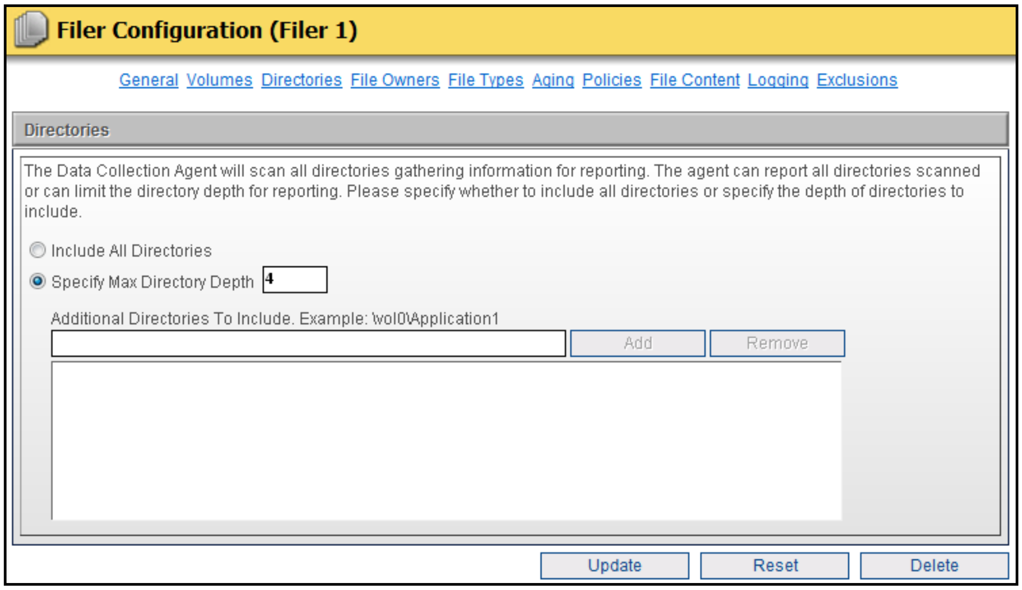


7. In the **Volumes** dialog box, select the resources you want to include in the data scan and then click the **Update** button.

> **NOTE:** To include all the volumes in the scanning operation, click the **Scan all Volumes** checkbox.

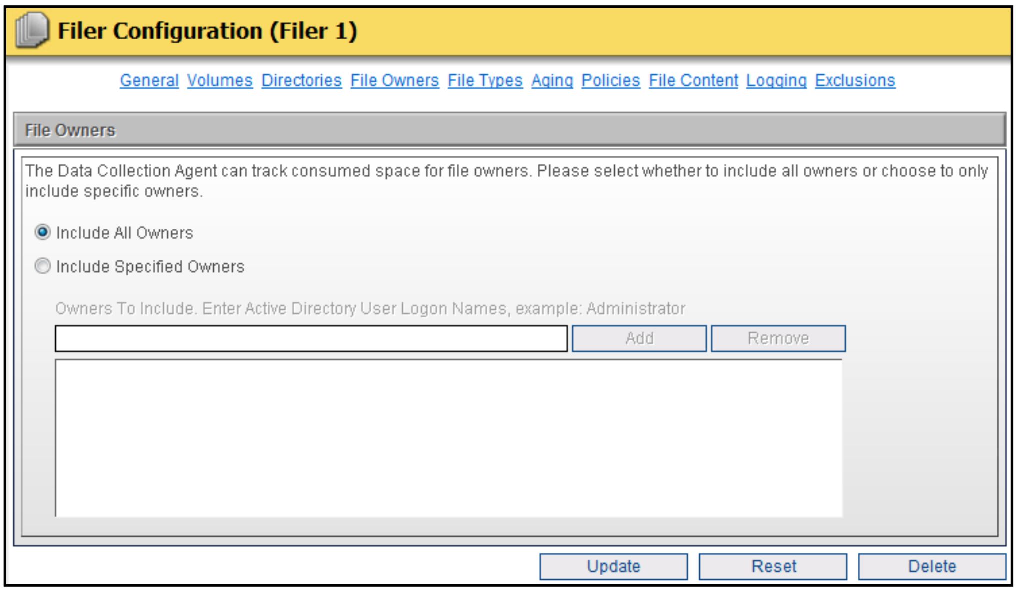
8. In the **Directories** dialog box, click the **Include All Directories** check box if you want the agent to report all directories scanned. Click the **Update** button.

NOTE: You still can limit the directory depth; in this case, you need to specify a depth value at which directories will be included to minimize your Database size. The agent will still scan all directories.



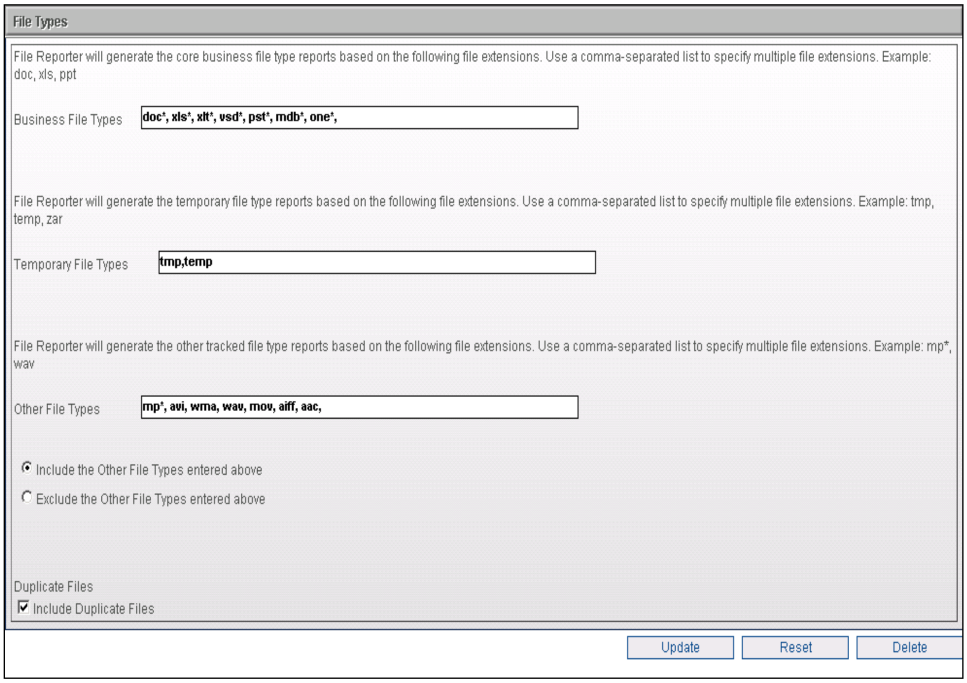
9. In the **File Owners** dialog box, click the **Include All Owners** checkbox to let the agent track consumed space for all file owners during the scan. Click the **Update** button.

NOTE: You still can choose to only include specific owners; click the **Include Specified Owners** checkbox to minimize your Database size (use the Add and Remove buttons to add/remove owners to/from the list). The agent will still scan all files owned by all file owners for the specified volumes.

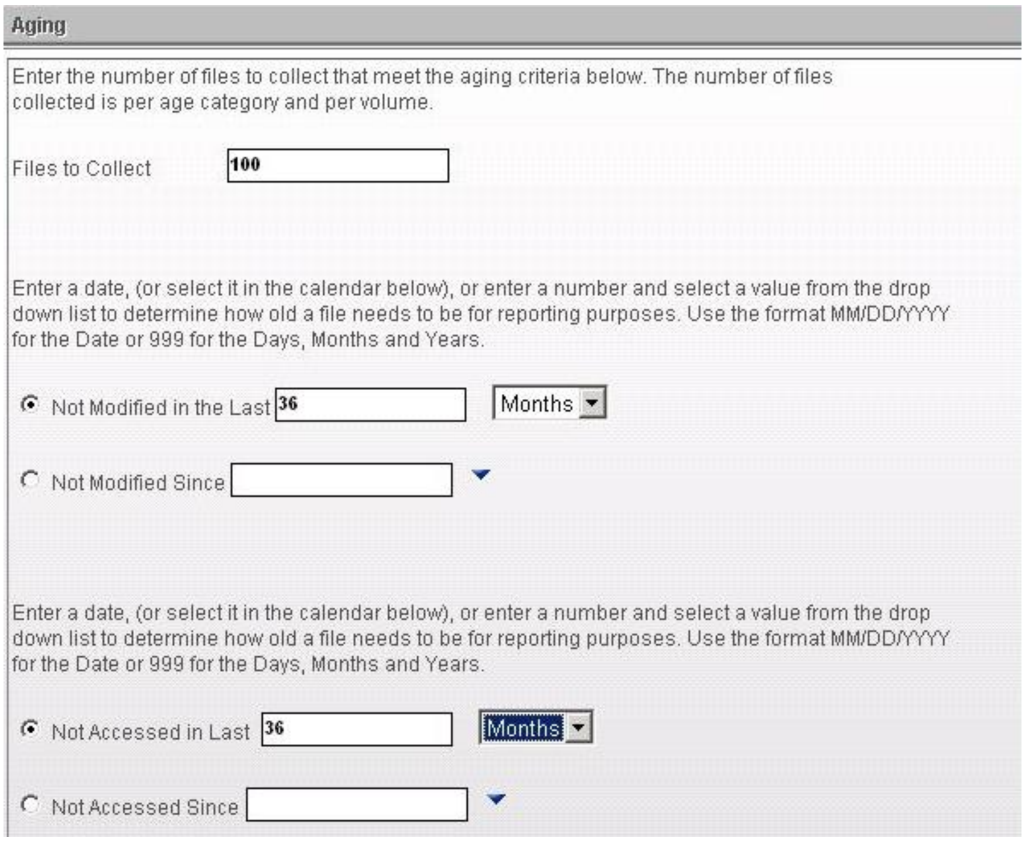


10. In the **File Types** dialog box, enter the file extensions you want to include in the business file types, temporary file types, and other file types during the scan. Click the **Update** button.

> **NOTE:** You can select to include/exclude other file types entered or select to include/exclude duplicate files.

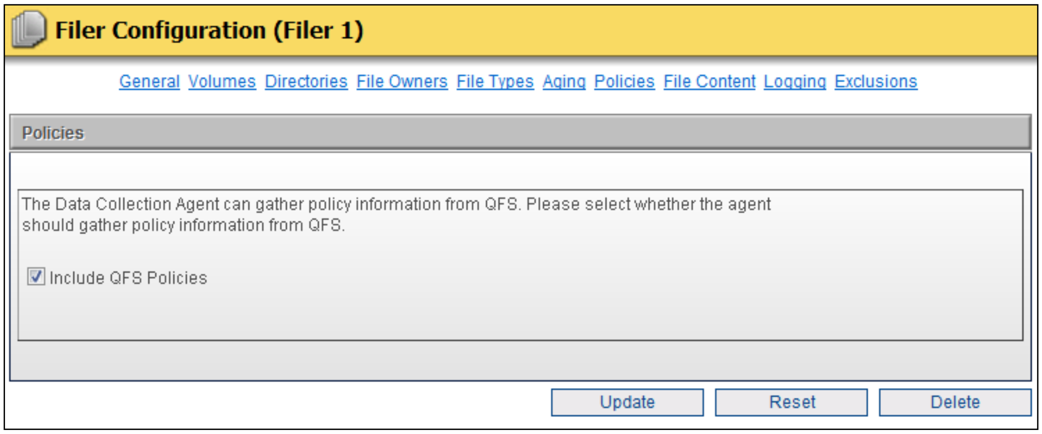


11. In the **Aging** dialog box, set the number of files to collect per age category and per volume. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old a modified file needs to be for reporting purposes. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old an accessed/not accessed file needs to be for reporting purposes. Click the **Update** button.

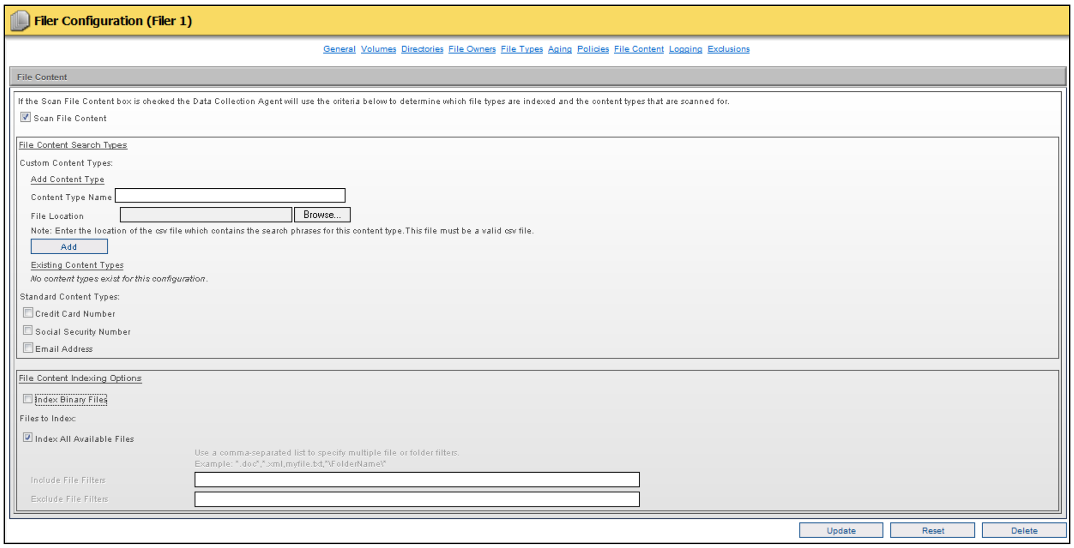


12. In the **Policies** dialog box, specify whether you want to include/exclude your NTP Software QFS policy information in the NTP Software File Reporter reports.

NOTE: NTP Software QFS® must be installed on an NTP Software Data Collection Agent™ Filer® to report policy information for that Filer®.



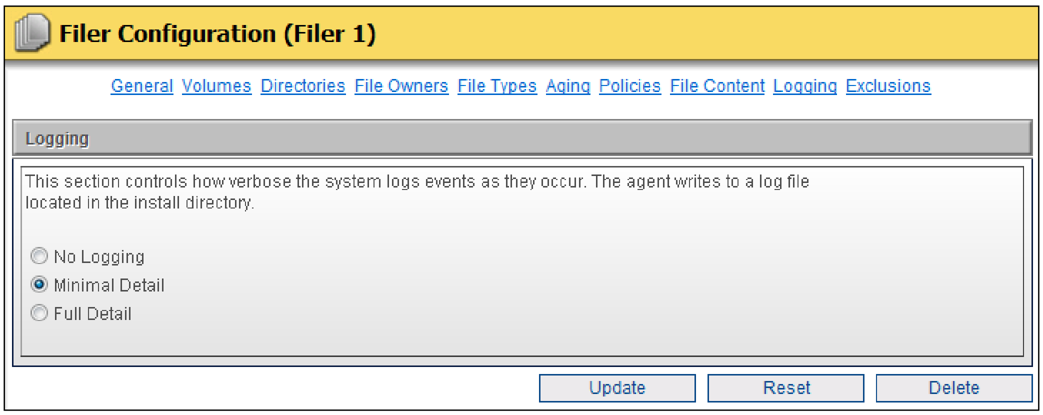
13. In the **File Content** dialog box, check the **Scan File Content** checkbox to be able to specify the file content search options. Search options include browsing to a desired .csv file containing search words or choosing from standard content types; specifying the file types/file names/file locations to be searched; and including/excluding binary files. Please check the Data Agent Administration Web Application Settings for Content Scanning for further explanation.



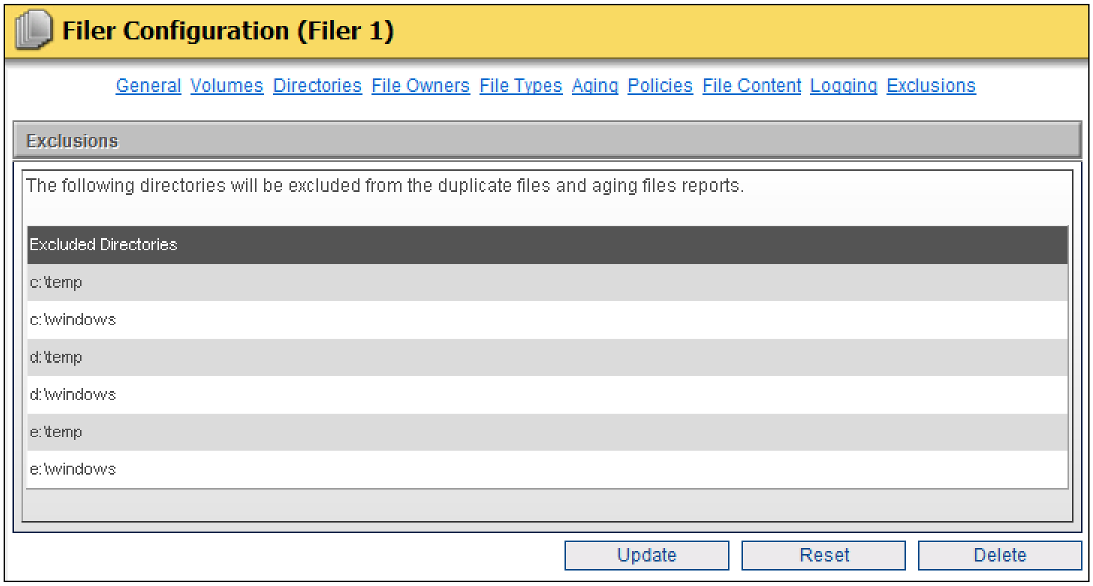
14. In the **Logging** dialog box, specify how you want the system to log events as they occur. Select any of the logging options and then click the **Update** button.

- No Logging: Prevents logging events to the log file.
- Minimal Detail: Logs a few event details to the log file.
- Full Detail: Logs all the details to the log file.

NOTE: Enabling logging will enter events into the DataAgent_<Filer® name>_YYYY_MM_DD.log file found in the install directory. This feature is very useful for troubleshooting purposes.

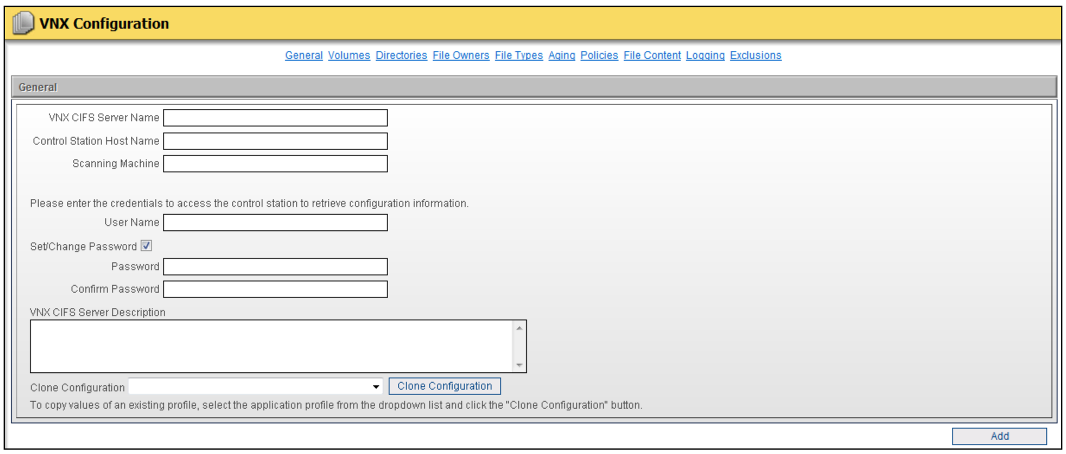


15. In the **Exclusions** dialog box, you can see the directories that will be excluded from the Duplicate Files and Aging Files reports. These defaults are areas in which the Filer® and administrator create files. Click **Update** to save your changes when the configuration is complete.



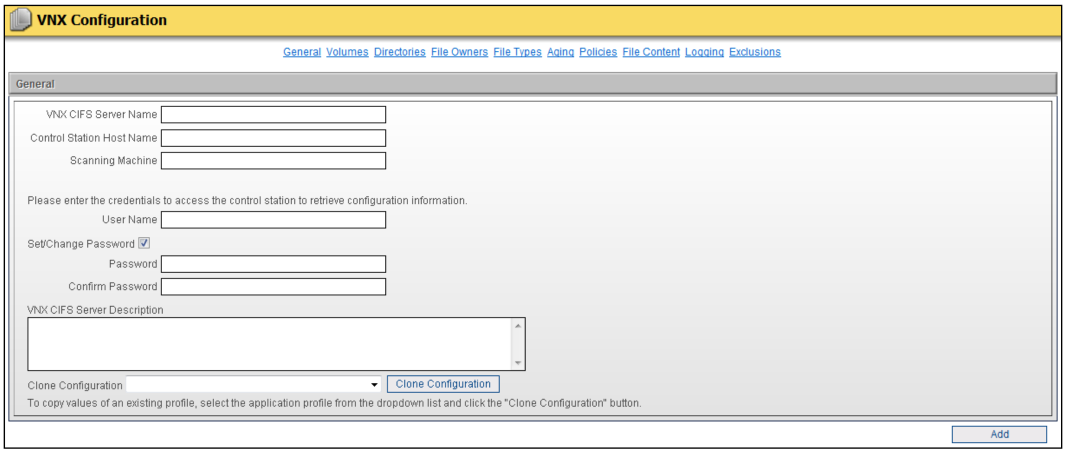
Configuring NTP Software Data Collection Agent for NAS EMC

1. From the NTP Software File Reporter™ Analysis Server machine, open the NTP Software Data Collection Agent™ Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter** > **NTP Software File Reporter Data Agent Administration**.
2. In the left-hand main menu, click **New VNX Configuration** to open the **VNX Configuration** window.



3. In the **General** dialog box, enter the VNX CIFS server name and other required information along with the VNX server description, and then click the **Add** button.

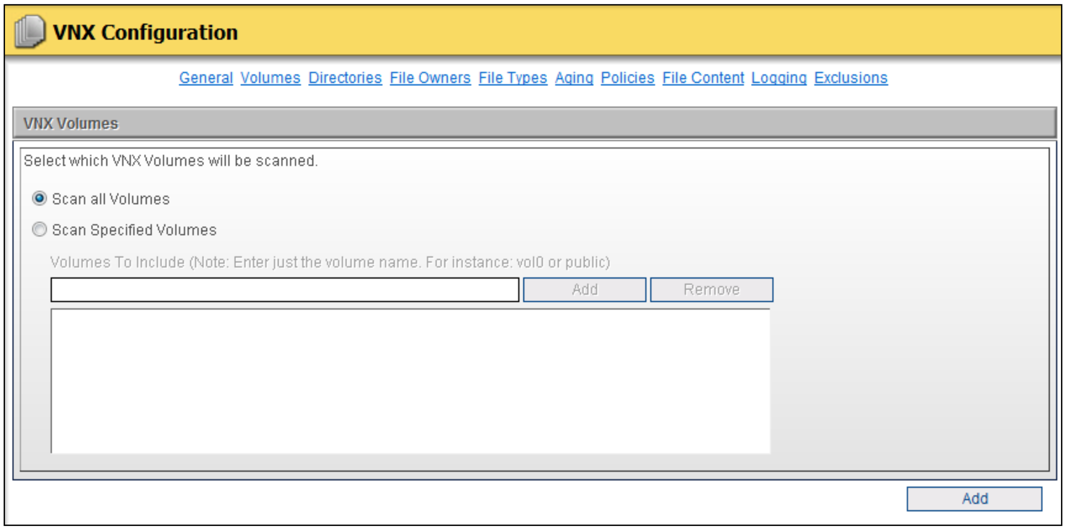
> **NOTE:** To copy values of an existing profile, select the application profile from the **Clone Configuration** dropdown list and then click the **Clone Configuration** button.



4. From the **Home** page, under the **EMC VNX Configurations** section, click the CIFS server name you want to update/configure.

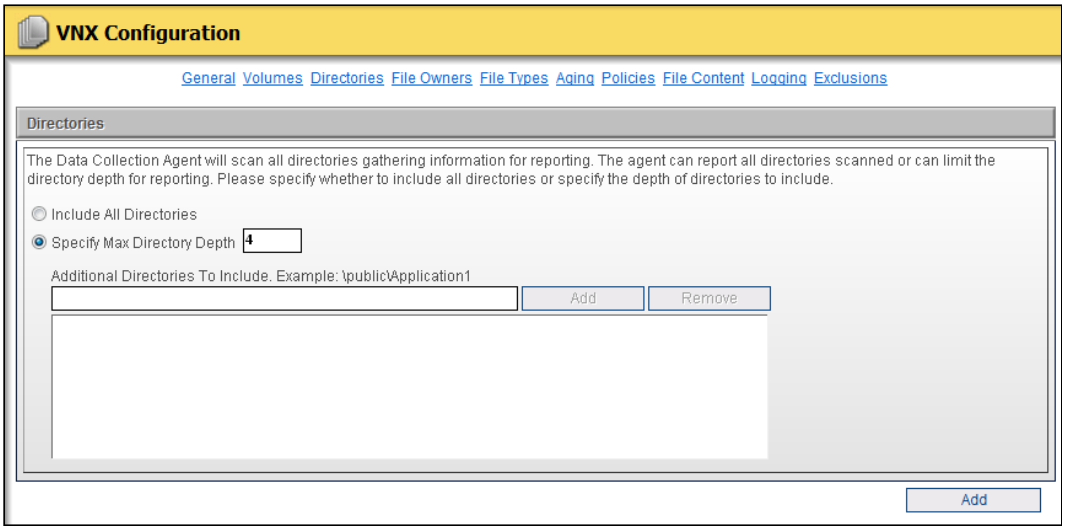
5. In the **Volumes** dialog box, select the resources you want to include in the data scan and then click the **Update** button.

NOTE: To include all the volumes in the scanning operation, click the **Scan all Volumes** checkbox.



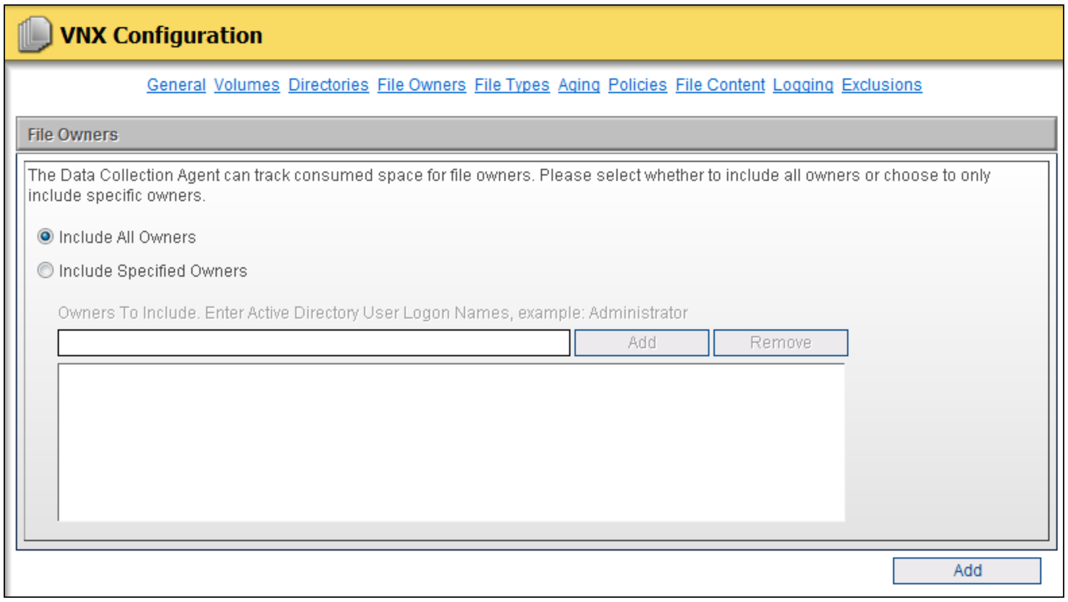
6. In the **Directories** dialog box, click the **Include All Directories** check box if you want the agent to report all directories scanned. Click the **Update** button.

NOTE: You still can limit the directory depth for storing in the database; in this case, you need to specify a depth value for directories to minimize your Database size. The agent will still scan all directories.



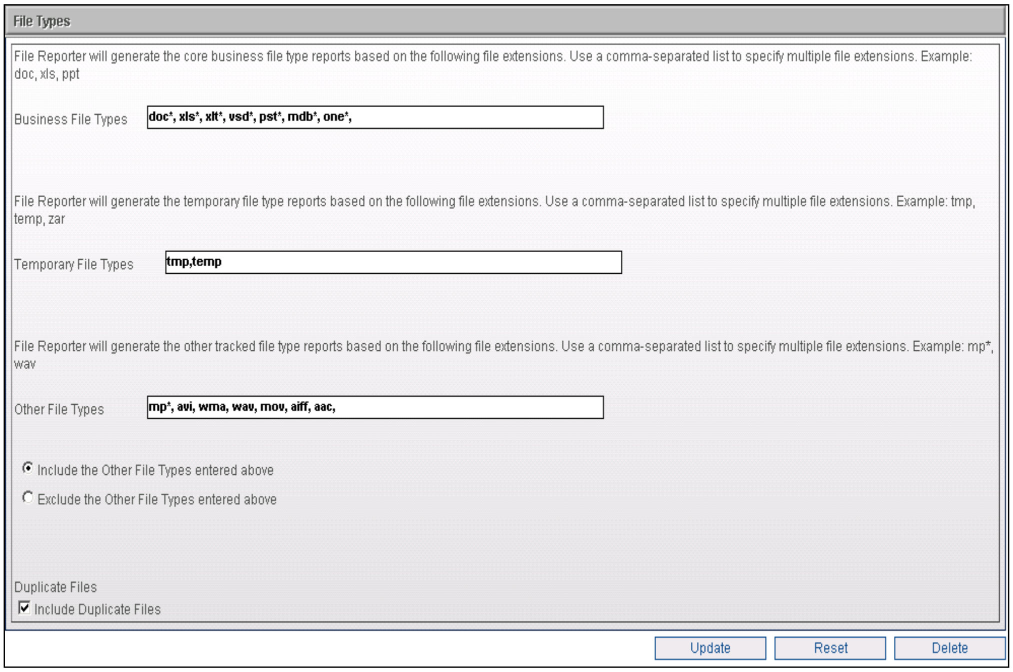
7. In the **File Owners** dialog box, click the **Include All Owners** checkbox to let the agent track consumed space for all file owners during the scan. Click the **Update** button.

NOTE: You still can choose only to include specific owners; select the **Include Specified Owners** checkbox to minimize your Database size (use the **Add** and **Remove** buttons to add/remove owners to/from the list). The agent will still scan all files owned by all file owners for the specified volumes.

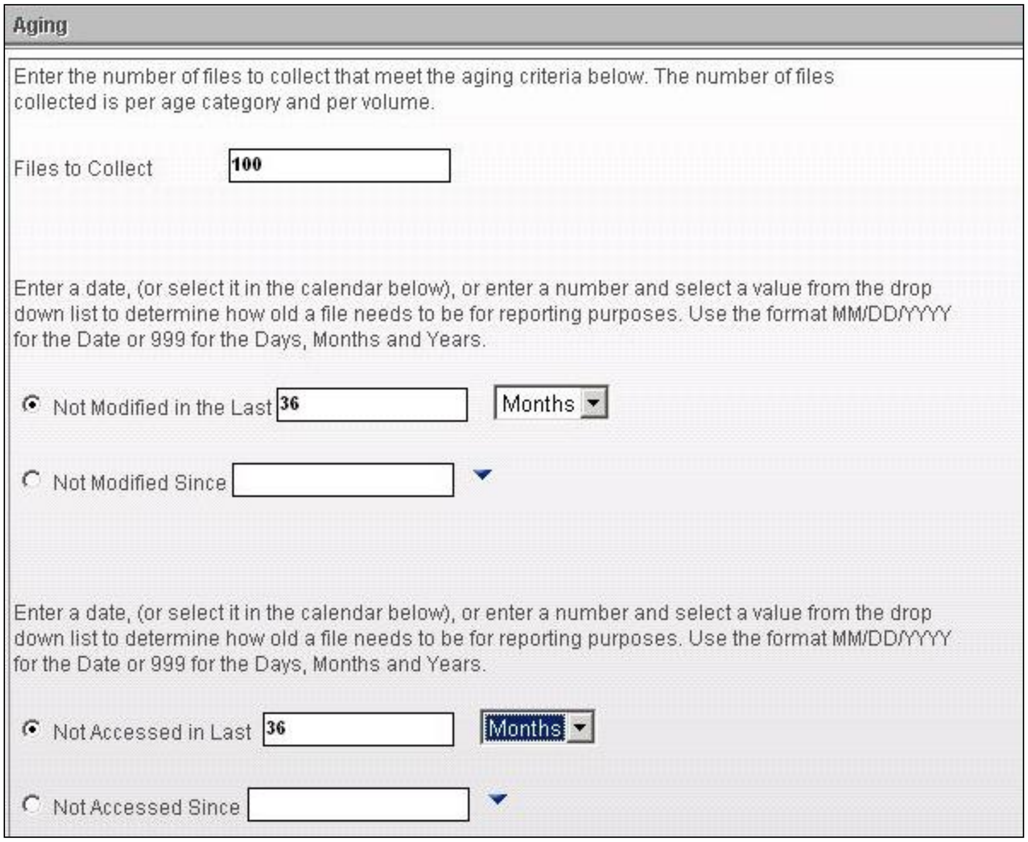


8. In the **File Types** dialog box, enter the file extensions you want to include in the business file types, temporary file types, and other file types during the scan. Click the **Update** button.

> **NOTE:** You can select to include/exclude other file types entered or select to include/exclude duplicate files.

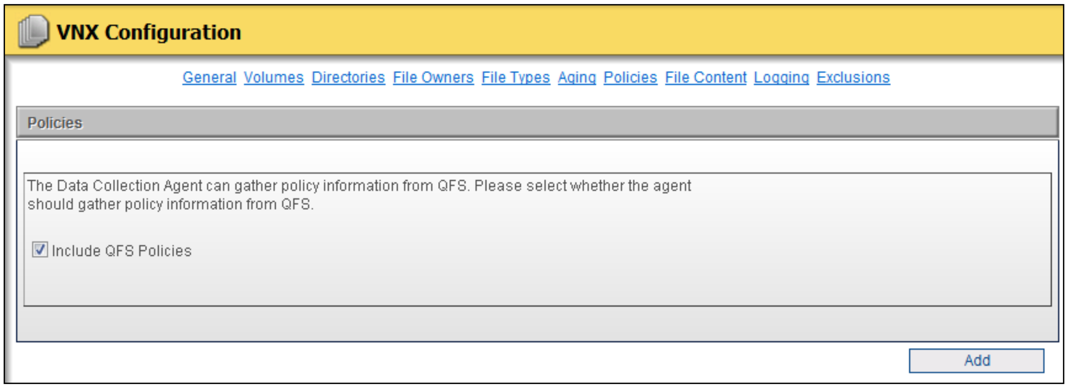


9. In the **Aging** dialog box, set the number of files to collect per age category and per volume. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old a modified file needs to be for reporting purposes. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old an accessed/not accessed file needs to be for reporting purposes. Click the **Update** button.



10. In the **Policies** dialog box, specify whether you want to include/exclude your NTP Software QFS policy information in the NTP Software File Reporter reports.

NOTE: NTP Software QFS must be installed on an NTP Software Data Collection Agent server to report policy information for that server.



11. In the **File Content** dialog box, check the **Scan File Content** checkbox to be able to specify the file content search options. Search options include browsing to a desired .csv file containing search words or choosing from standard content types; specifying the file types/file names/file locations to be searched; and including/excluding binary files. Please check the [Data Agent Administration Web Application Settings for Content Scanning]() for further explanation.

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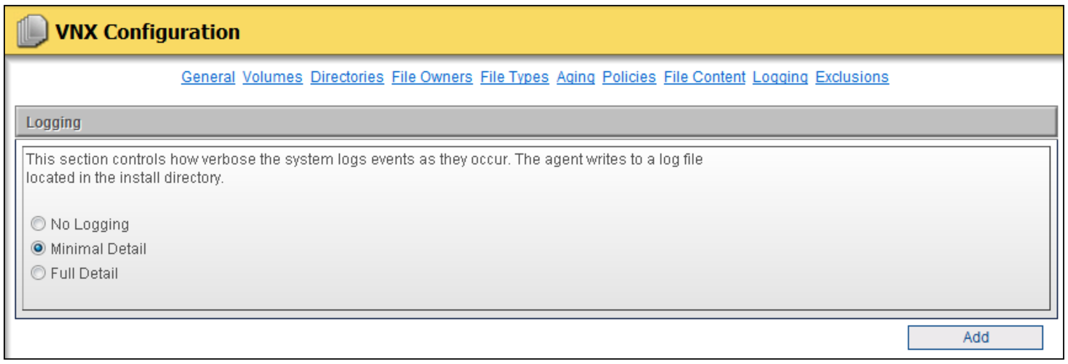
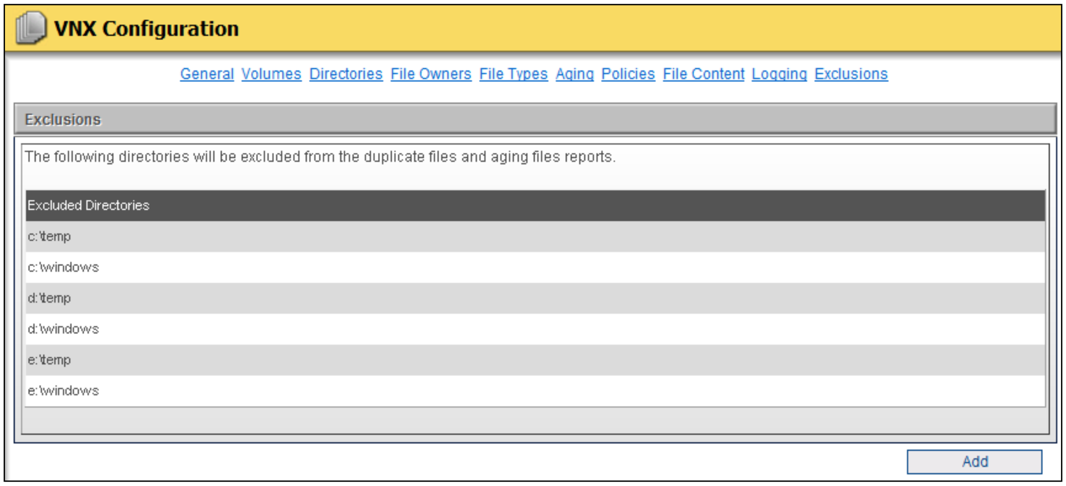
NOTE: Enabling logging will enter events into the DataAgent_<VNX name>_YYYY_MM_DD.log file found in the install directory. This feature is very useful for troubleshooting purposes.



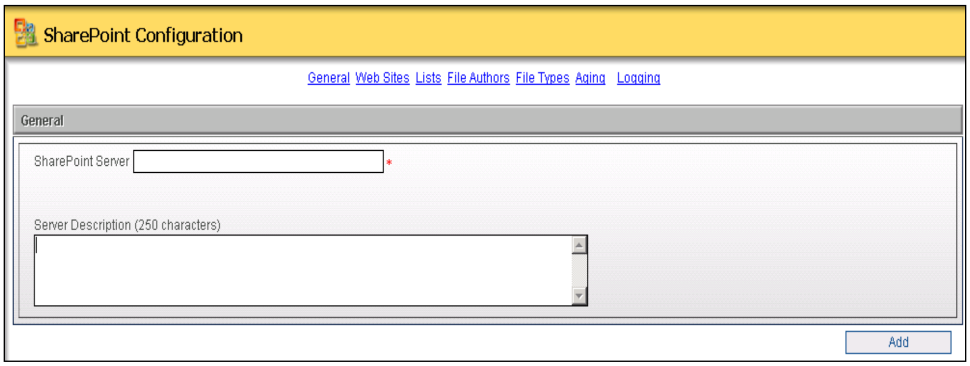
13. In the **Exclusions** dialog box, you can see the directories that will be excluded from the Duplicate Files and Aging Files reports. These defaults are areas in which the VNX and administrator create files. Click **Update** to save your changes when the configuration is complete.



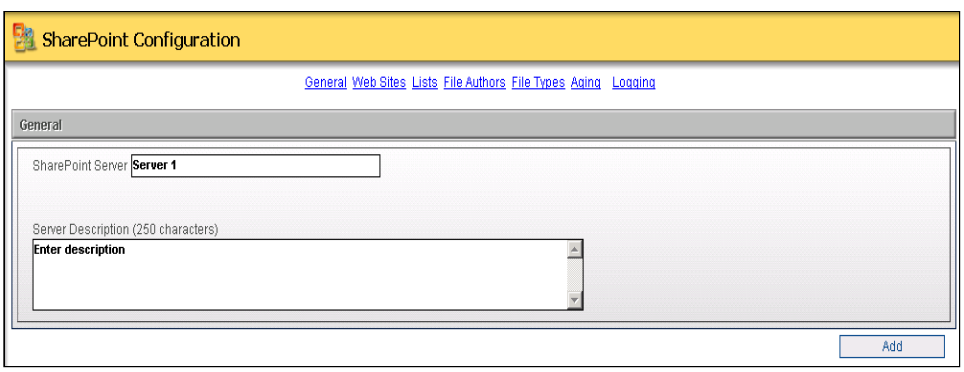
Configuring NTP Software Data Collection Agent for SharePoint

1. From the NTP Software File Reporter Analysis Server machine, open the NTP Software Data Collection Agent Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter** > NTP **Software File Reporter Data Agent Administration**.

2. In the left-hand main menu, click **New SharePoint Configuration** to open the **SharePoint Configuration** window.



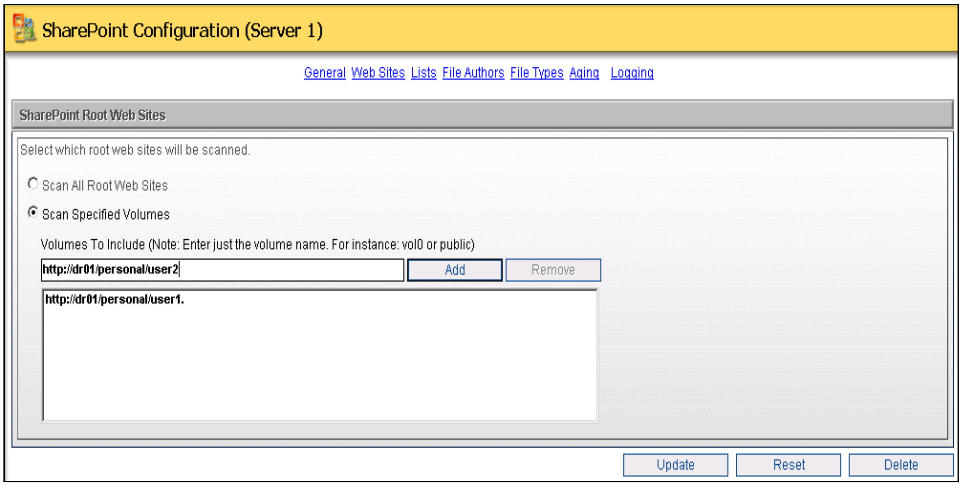
3. In the **General** dialog box, enter the SharePoint server name and server description (if desired) and then click the **Add** button.



4. From the **Home** page, under the **SharePoint Configurations** section, click the server name you want to update/configure.

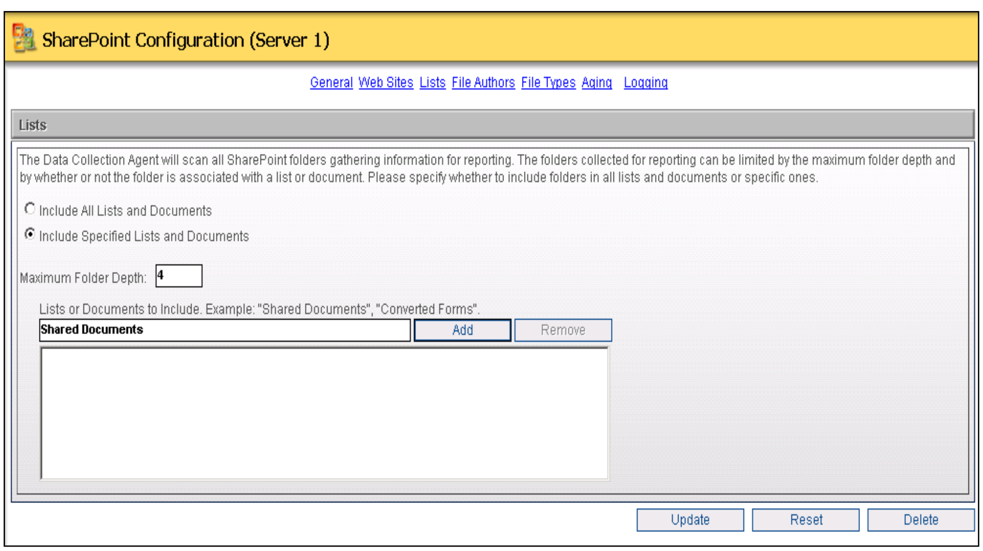
5. In the **SharePoint Root Web Sites** dialog box, select the web sites you want to include in the data scan and then click the **Update** button.

> **NOTE:** To include all the root websites in the scanning operation, click the **Include all Root Web Sites** checkbox.



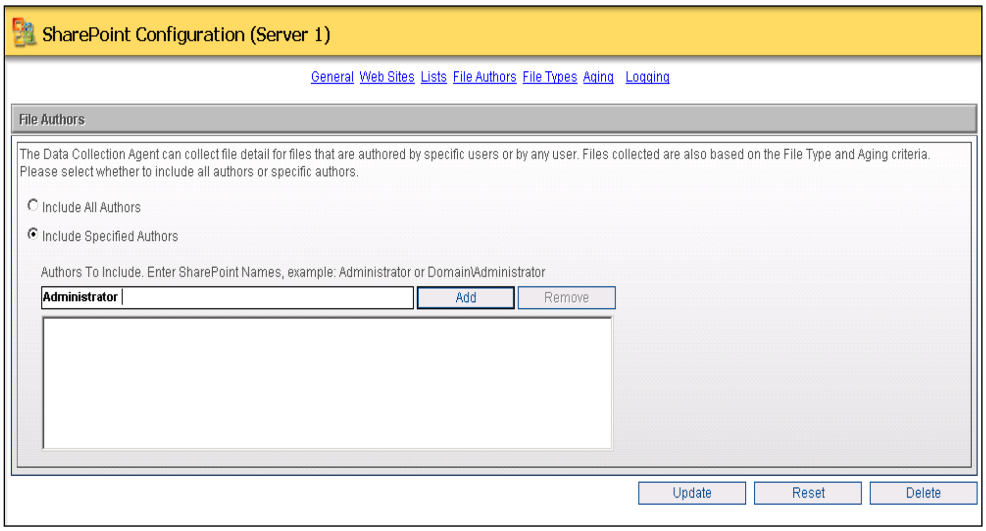
6. In the **Lists** dialog box, click the **Include All Lists and Documents** checkbox if you want the agent to report all folders scanned. Click the **Update** button.

> **NOTE:** You still can limit the lists and documents depth; in this case, you need to specify a depth value at which lists and documents will be included to minimize your Database size. The agent will still scan all lists and documents for the specified web sites.



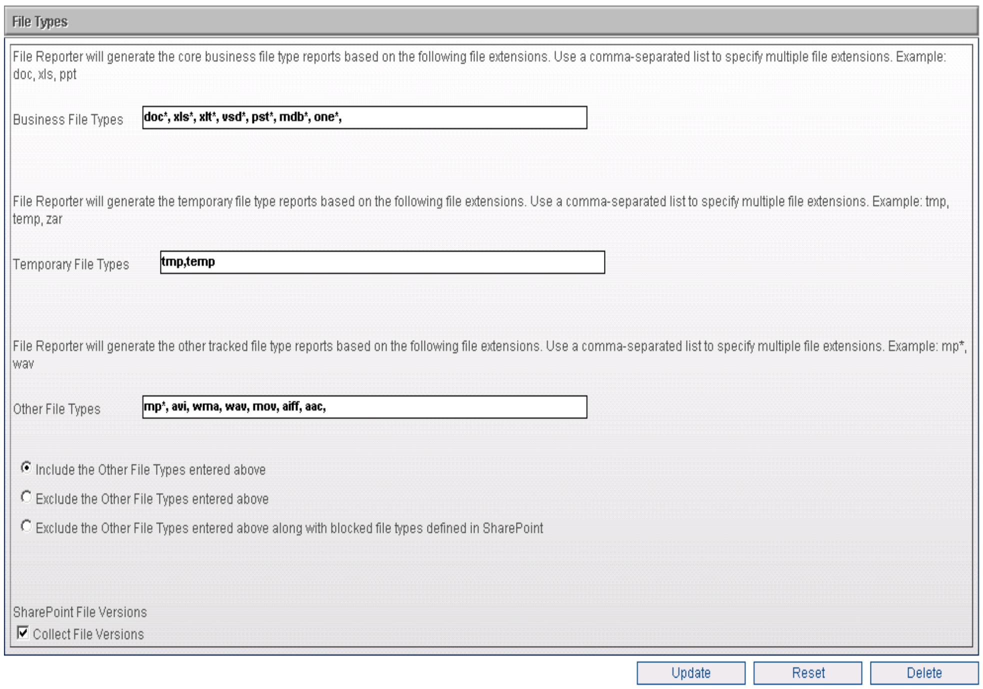
7. In the **File Authors** dialog box, click the **Include All Authors** checkbox to let the agent track consumed space for all file authors during the scan. Click the **Update** button.

NOTE: You still can choose to only include specific authors; click the **Include Specified Authors** checkbox to minimize your database size (use the **Add** and **Remove** buttons to add/remove owners to/from the list). The agent will still scan all files owned by all file authors on the specified web sites.

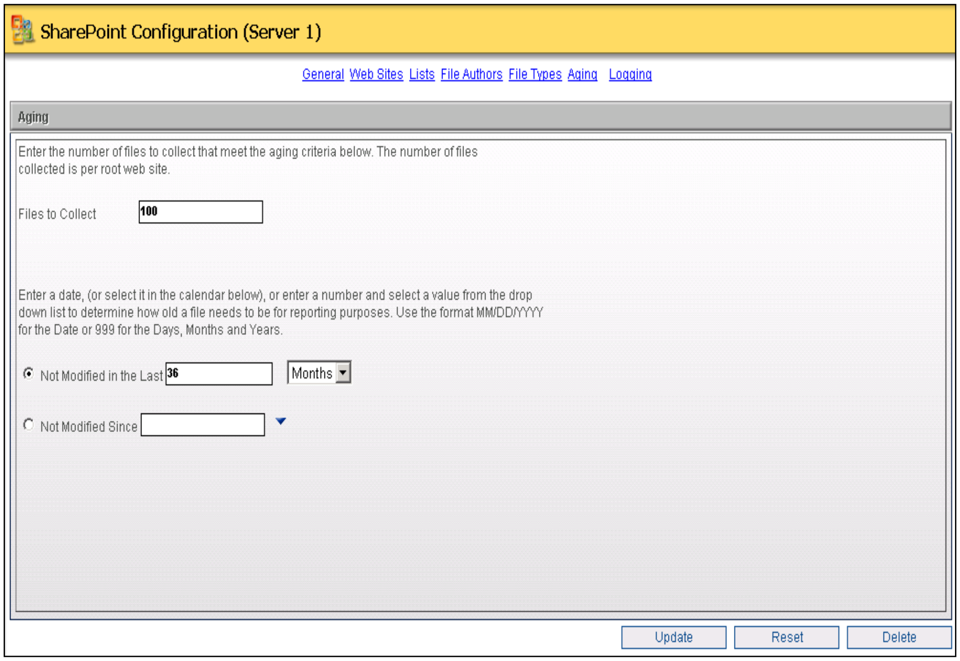


8. In the **File Types** dialog box, enter the file extensions you want to include in the business file types, temporary file types, and other file types during the scan. Click the **Update** button.

NOTE: You can select to include/exclude other file types entered, exclude other file types with blocked content or select to include/exclude file versions.



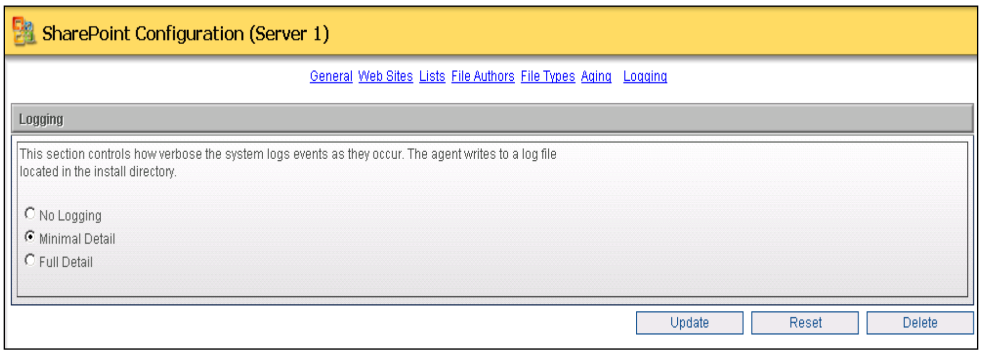
9. In the **Aging** dialog box, set the number of files to collect per root web site. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old a modified file needs to be for reporting purposes. Click the **Update** button.



10. In the **Logging** dialog box, specify how you want the system to log events as they occur. Select any of the logging options and then click the **Update** button.

- No Logging: Prevents logging events to the log file.
- Minimal Detail: Logs a few event details to the log file.
- Full Detail: Logs all the details to the log file.

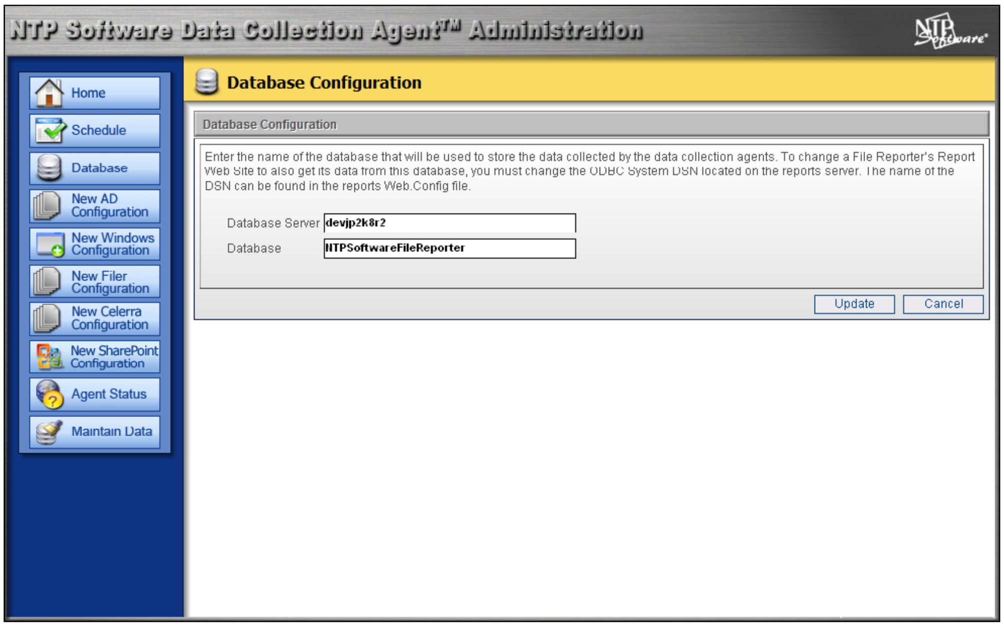
NOTE: Enabling logging will enter events into the DataAgent_<server name>_YYYY_MM_DD.log file found in the install directory. This feature is very useful for troubleshooting purposes.



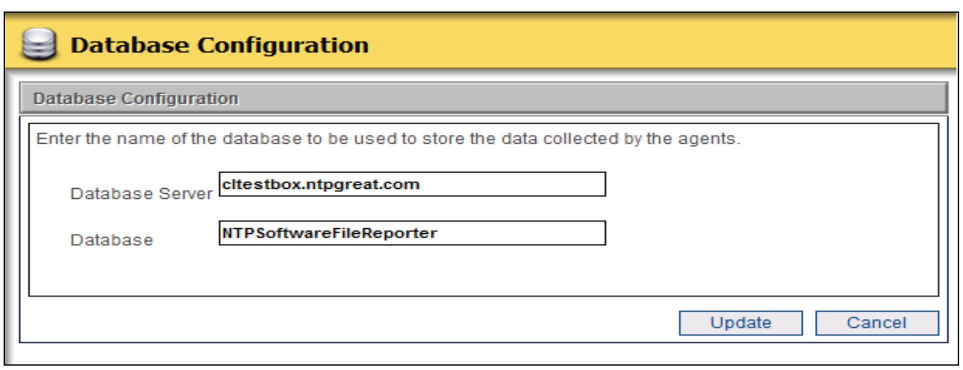
NTP Software Data Collection Agent Database Configuration

To configure the database of NTP Software Data Collection Agent™, do the following:

1. In the left-hand main menu, click **Database** to open the **Database Configuration** window.



2. In the **Database Configuration** dialog box, update the database server and the database.

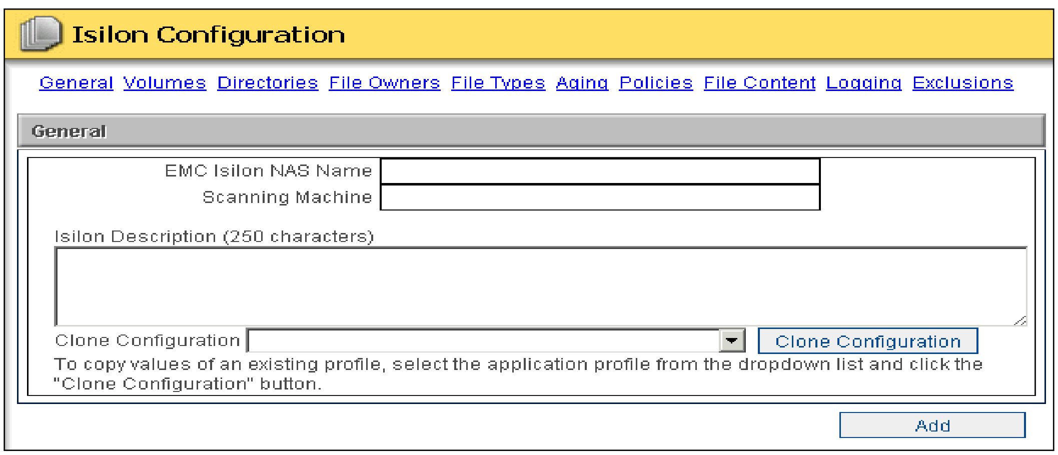


3. Click the **Update** button to save your changes.

NOTE: To change a File Reporter's Report Web Site to get data from the specified database, please make sure to change the ODBC System DSN located on the reports server. The name of the DSN can be found in the reports Web.Config file.

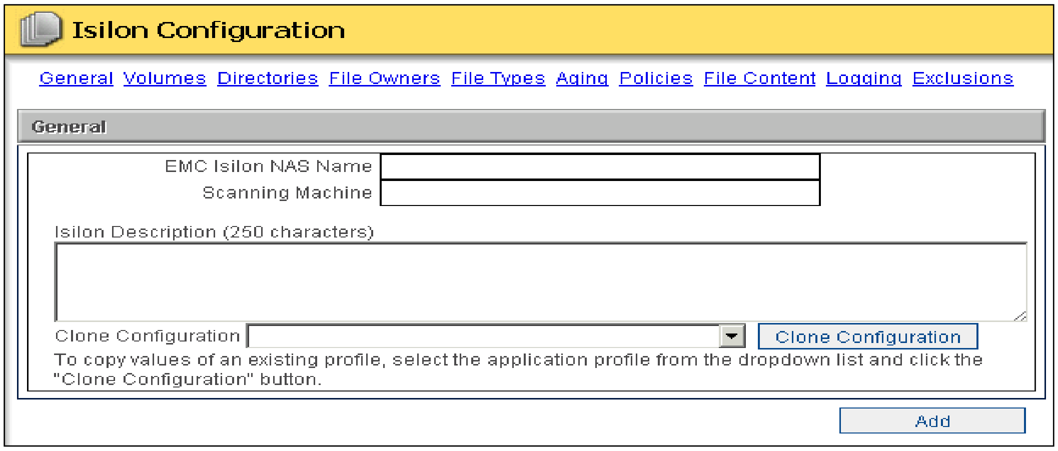
Configuring NTP Software Data Collection Agent for NAS EMC Isilon

1. From the NTP Software File Reporter™ Analysis Server machine, open the NTP Software Data Collection Agent™ Administration by clicking **Start** > **All Programs** > **NTP Storage Software File Reporter** > **NTP Software File Reporter Data Agent Administration**.
2. In the left-hand main menu, click **New Isilon Configuration** to open the **Isilon Configuration** window.



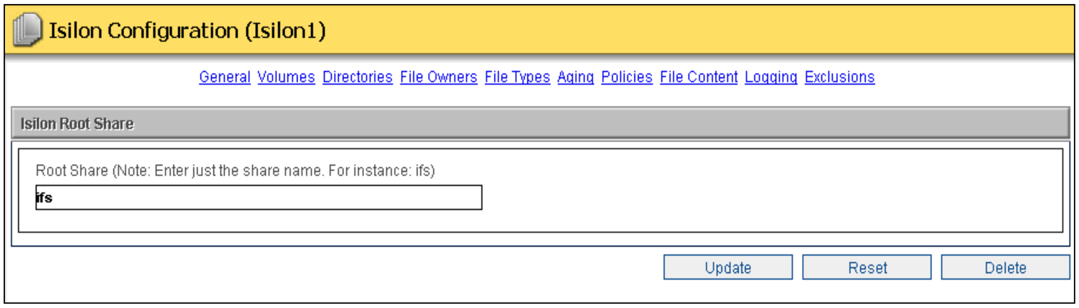
3. In the **General** dialog box, enter the EMC Isilon NAS machine name, the scanning machine along with the description, and then click the **Add** button.

> **NOTE:** To copy values of an existing profile, select the application profile from the **Clone Configuration** dropdown list and then click the **Clone Configuration** button.



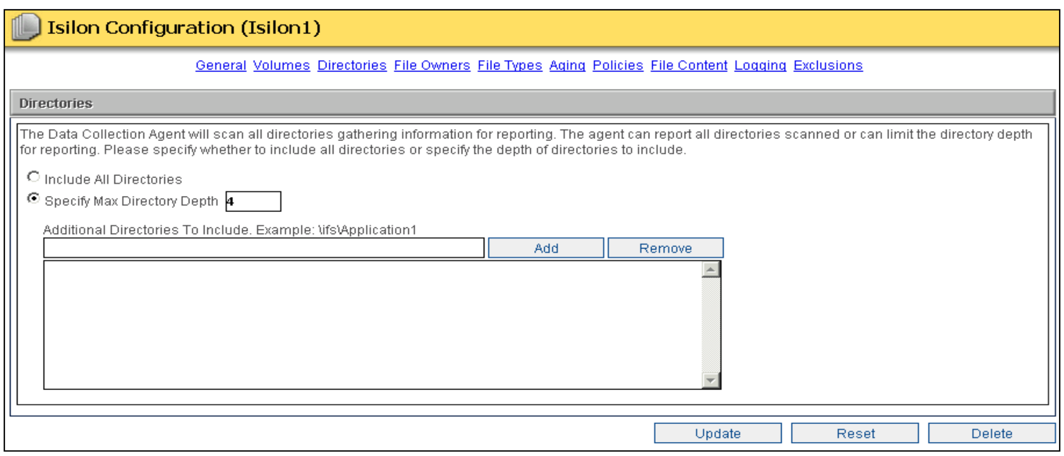
4. From the **Home** page, under the **EMC Isilon NAS Configurations** section, click the Isilon name you want to update/configure.

5. In the **Volumes** dialog box, enter the root share and then click the **Update** button.



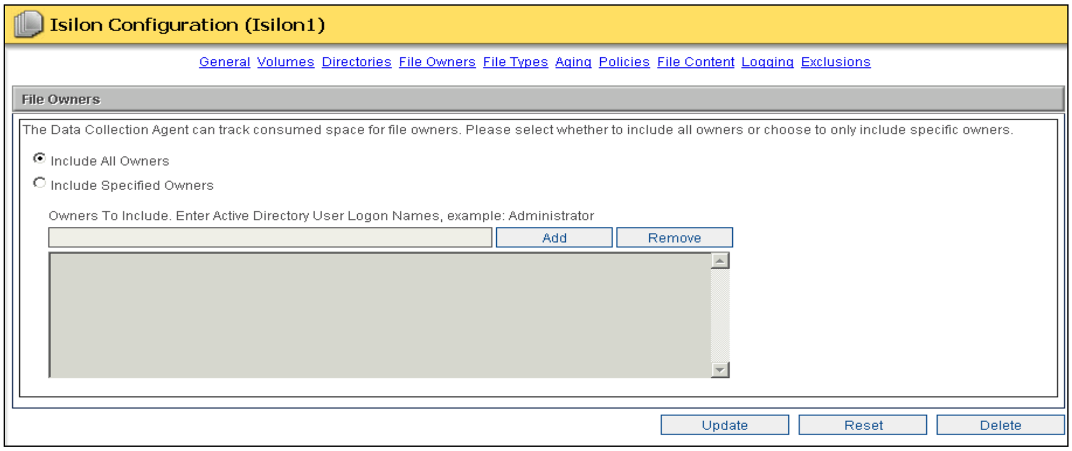
6. In the **Directories** dialog box, click the **Include All Directories** check box if you want the agent to report all directories scanned. Click the **Update** button.

NOTE: You still can limit the directory depth for storing in the database; in this case, you need to specify a depth value for directories to minimize your Database size. The agent will still scan all directories.



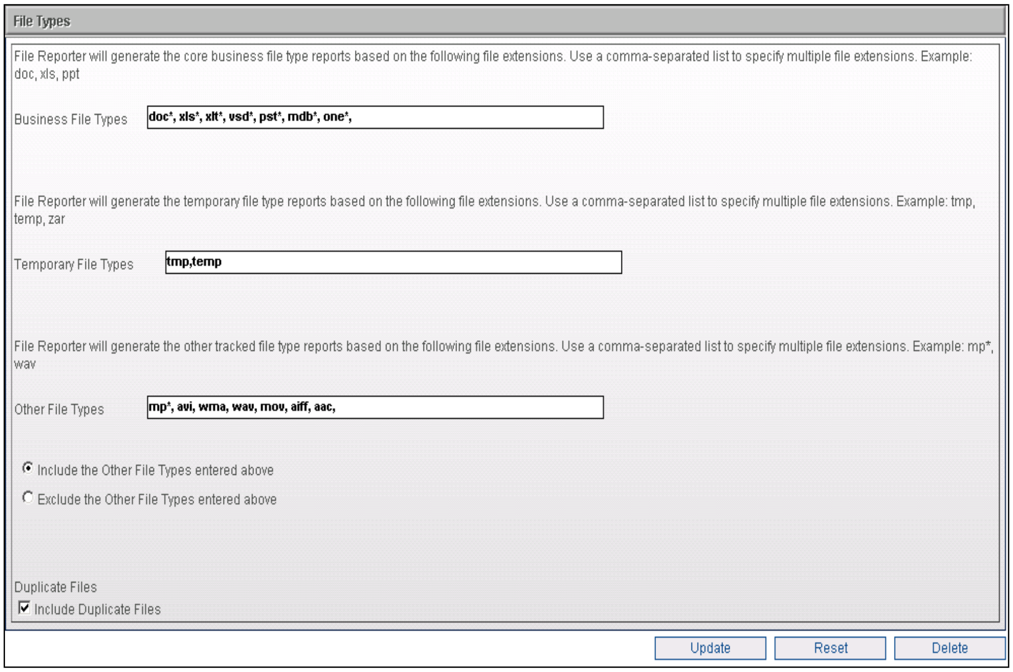
7. In the **File Owners** dialog box, click the **Include All Owners** checkbox to let the agent track consumed space for all file owners during the scan. Click the **Update** button.

> **NOTE:** You still can choose only to include specific owners; select the **Include Specified Owners** checkbox to minimize your Database size (use the **Add** and **Remove** buttons to add/remove owners to/from the list). The agent will still scan all files owned by all file owners for the specified volumes.

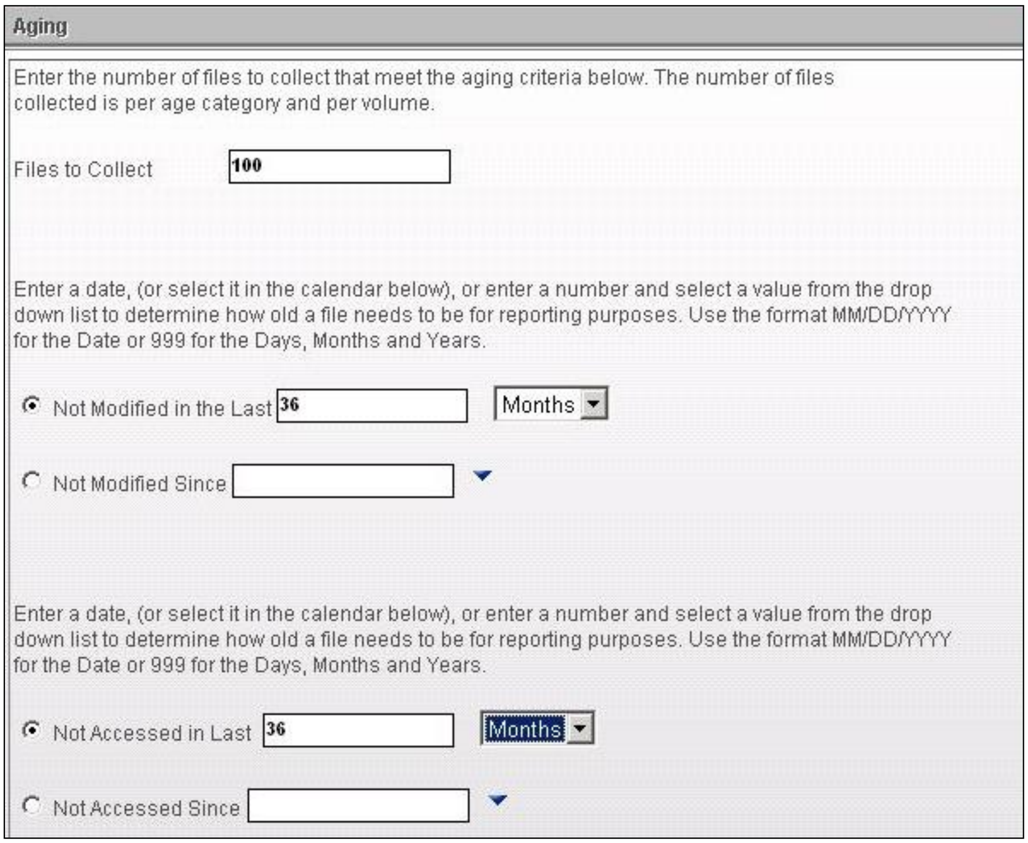


8. In the **File Types** dialog box, enter the file extensions you want to include in the business file types, temporary file types, and other file types during the scan. Click the **Update** button.

> **NOTE:** You can select to include/exclude other file types entered or select to include/exclude duplicate files.

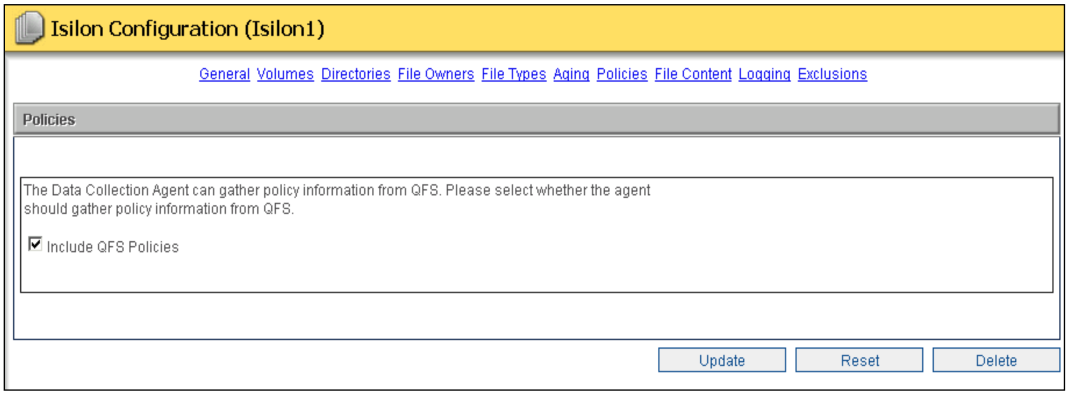


9. In the **Aging** dialog box, set the number of files to collect per age category and per volume. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old a modified file needs to be for reporting purposes. Enter a date (or select it in the calendar), or enter a number and select a value from the drop-down list to determine how old an accessed/not accessed file needs to be for reporting purposes. Click the **Update** button.



10. In the **Policies** dialog box, specify whether you want to include/exclude your NTP Software QFS policy information in the NTP Software File Reporter reports.

NOTE: NTP Software QFS must be installed on an NTP Software Data Collection Agent server to report policy information for that server.

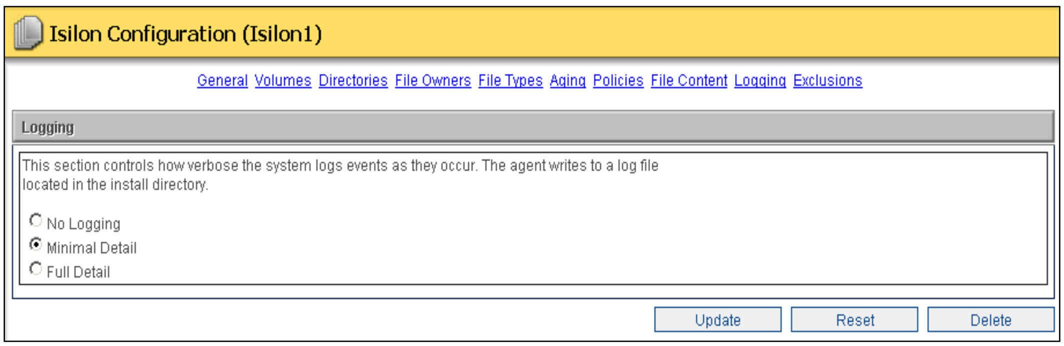


11. In the **File Content** dialog box, check the **Scan File Content** checkbox to be able to specify the file content search options. Search options include browsing to a desired .csv file containing search words or choosing from standard content types; specifying the file types/file names/file locations to be searched; and including/excluding binary files. Please check the [Data Agent Administration Web Application Settings for Content Scanning]() for further explanation.

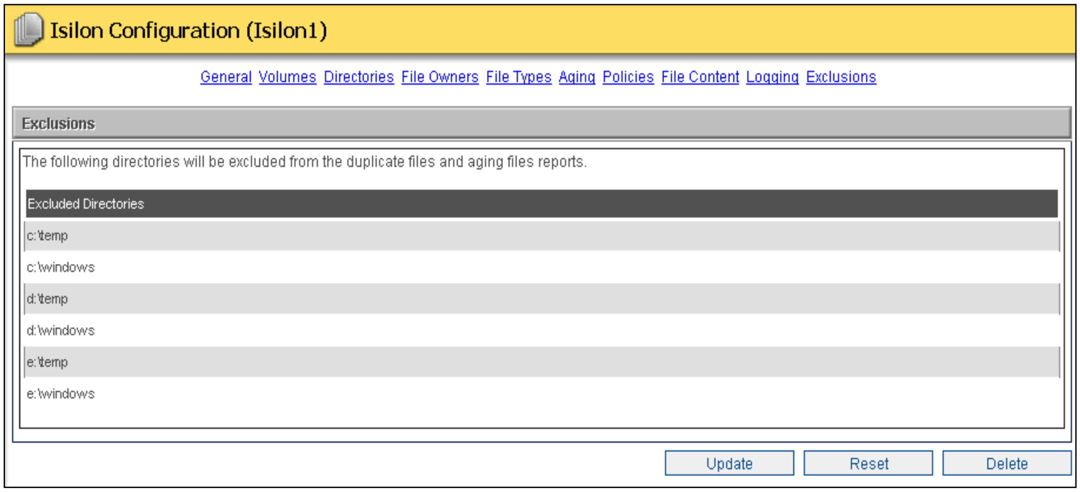
12. In the **Logging** dialog box, specify how you want the system to log events as they occur. Select any of the logging options and then click the **Update** button.

- No Logging: Prevents logging events to the log file.
- Minimal Detail: Logs a few event details to the log file.
- Full Detail: Logs all the details to the log file.

NOTE: Enabling logging will enter events into the DataAgent_<Isilon name>_YYYY_MM_DD.log file found in the install directory. This feature is very useful for troubleshooting purposes.

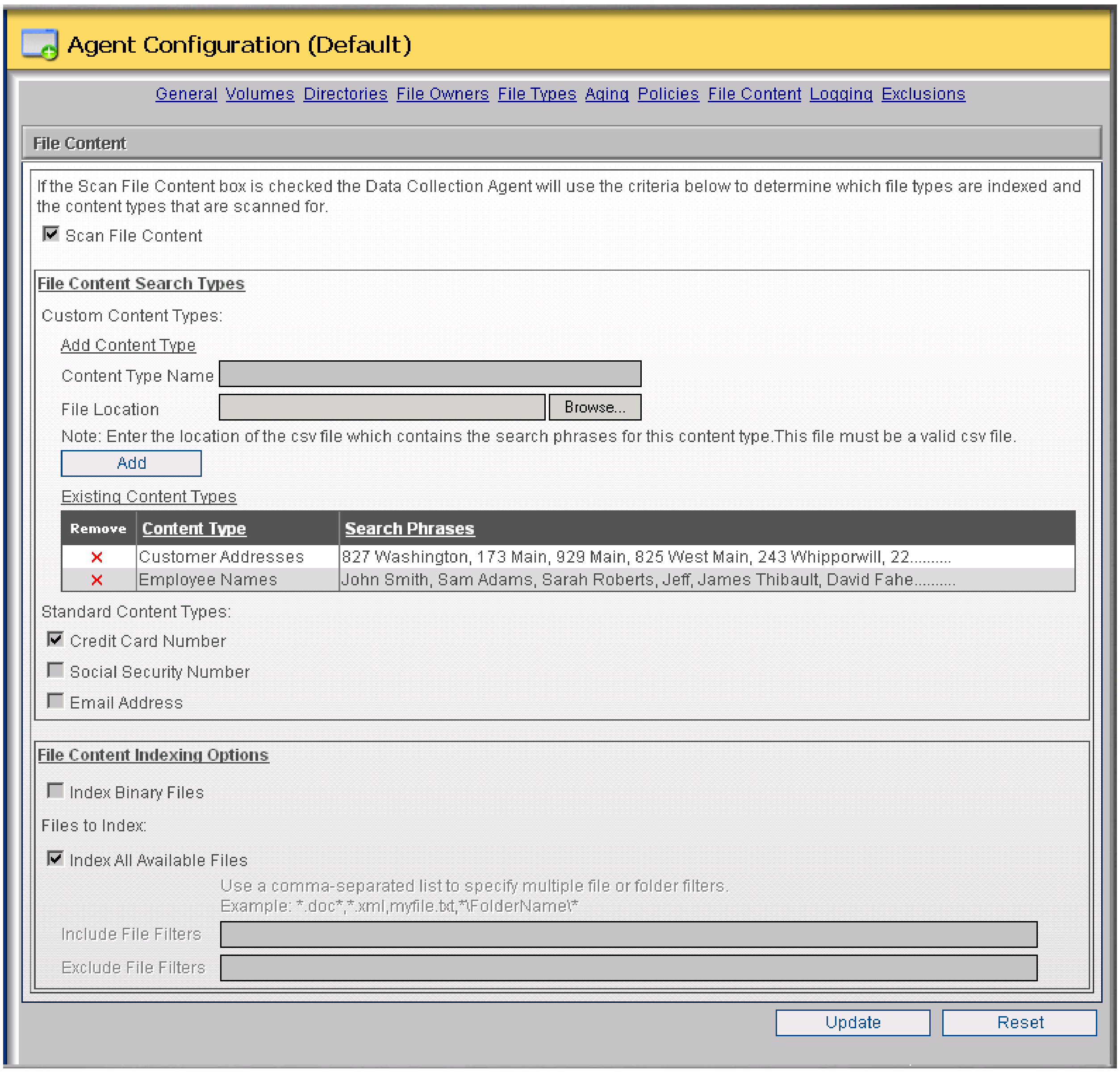


13. In the **Exclusions** dialog box, you can see the directories that will be excluded from the Duplicate Files and Aging Files reports. These defaults are areas in which the Isilon and administrator create files. Click **Update** to save your changes when the configuration is complete.



Data Agent Administration Web Application Settings for Content Scanning

A File Content settings group exists in the Windows, Filer, VNX, Hitachi, and Isilon configurations. This settings group allows for the specification of the standard file content search options.



In the **File Content Search Types** pane, the content types that will be searched for are specified. The standard content types available are:

- Credit Card Number
- Social Security Number
- Email Address

Custom content types can also be specified by importing a .csv file of search phrases. These custom search phrases may be a single word or multiple words separated by commas. Each phrase must match all the words specified in the phrase in order to generate a hit or occurrence (content type occurrences are reported in the File Reporter reports). If any phrase in a content type is matched, then a hit or occurrence is generated and reported in the File Reporter reports for that content type. The search that results from the .csv file is equivalent to a Boolean "or" search of all the phrases that are specified.

In the **File Content Indexing** options pane, the types of files that will be indexed and subsequently scanned for content types are specified.

Binary files may either be included or excluded from indexing. Binary files are files that are not recognized as documents. Examples of binary files include executables and file fragments or blocks of data that have been recovered or obtained by applications. If binary files are included in indexing, text will be extracted from the unrecognized files using an algorithm that scans for sequences of single byte, UTF-8, and Unicode text. Indexing binary files is recommended for use with forensic data.

In addition, the option exists to index all files on the system ("Index All Available Files") or, alternatively, to specify include and exclude filters. Include and exclude filters can be specified as a comma-separated list of file and folder filters for example: *.doc*, *.xml, myfile.txt, *\FolderName*. A file will be indexed if it matches one of the "Include Filters" and does not match any of the "Exclude Filters." A filter without a slash character will be matched against the file name only when the files are indexed, whereas a filter that contains a slash will be matched against the entire file path.

Certain files types that are recognized as container files will automatically be treated as multiple documents, where each document within the container file is indexed and scanned for content types. Each container file that contains files with content hits will be reported in the File Reporter reports, along with information about the individual files within the container. The file types that are treated as container files are: .zip, .dbf, .csv, Microsoft Access (.mdb and .accdb), .mbox, Outlook Express (.dbx), and Outlook (.pst).

Offline files are automatically skipped and will not be indexed, as they would need to be recalled to the system being scanned in order to retrieve their text.

NOTES:

- The credit card number content type will recognize any sequence of numbers that appears to satisfy the criteria for a valid credit card number issued by one of the major credit card issuers. Credit card numbers are recognized regardless of the pattern of spaces or punctuation within the number. Numerical tests used by the credit card issuers for card validity are used to exclude sequences of numbers that are not credit card numbers. These numerical tests may detect some numbers that are not actual credit card numbers.
- The Social Security number content type will match a sequence of numbers that conforms to the pattern xxx xx xxxx. Since hyphens are indexed as spaces, this pattern will match U.S. Social Security numbers that contains spaces or hyphens. Since other numbers can conform to the same pattern, some numbers that are not actual Social Security numbers may be detected.

In the default mode of operation, the Data Collection Agents will transfer any indexes that were created or updated locally, to the web server on which the Data Agent Administration website exists, through the Data Agent Administration web service. The location is configurable through an application setting in the web.config file of the Data Agent Administration website:

```
<add key="IndexLocation" value="\\ServerName\INDEX"/>
```

During installation, the “IndexLocation” in the web.config is set to the path specified by the user in the “File Content Index Location” dialog box. If the user specifies to locate the indexes within the Data Agent Administration web application installation folder, the application setting would look like this, for example:

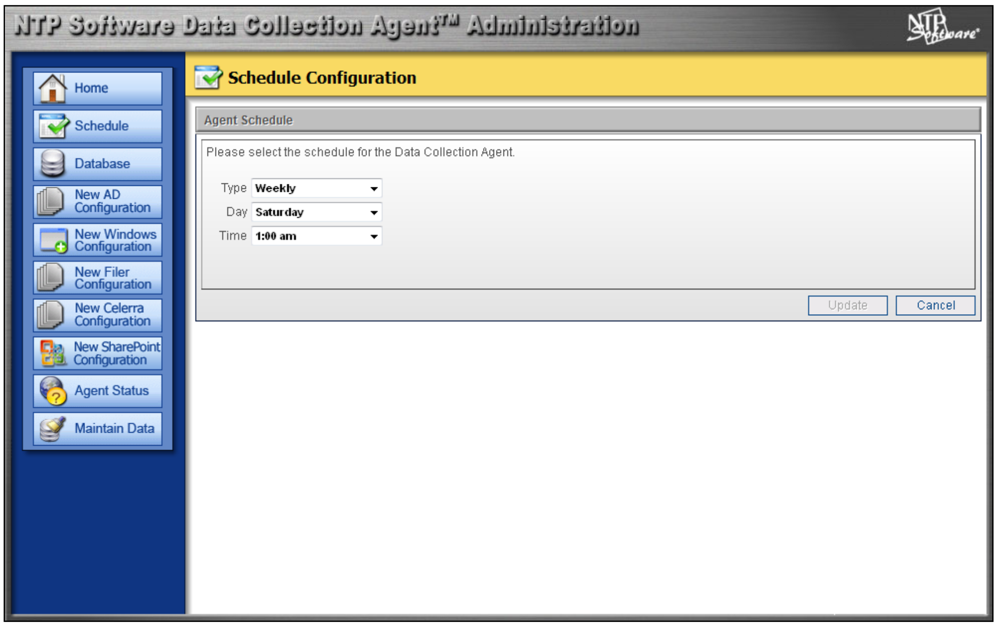
```
<add key="IndexLocation" value="C:\Program Files\NTPSoftware \File Reporter\ConfigService\INDEX"/>
```

In the default mode of operation wherein index transfer functionality is enabled, the File Reporter web application requires read access and the Data Agent Administration web application requires write access to the index storage location on the web server. This is accomplished during installation for a user-specified index location if a local path on the server is chosen. If a share is specified, the installer will not be able to set permissions because by default, the File Reporter and Data Agent Administration web applications application pools are configured to run under local accounts. In this case, the web applications will need to be configured appropriately so they can access the share located on another server in addition to the permissions on the specified share. This can be accomplished, for example, by creating a domain user or users, setting the application pools for the web applications to run under these identities, and assigning the appropriate permissions to these users on the share location. Also, if the “Index Location” setting is changed from its initial value by manually modifying the web.config file in the Data Agent Administration web application, these permission requirements will need to be manually configured for the new “IndexLocation” folder and/or share.

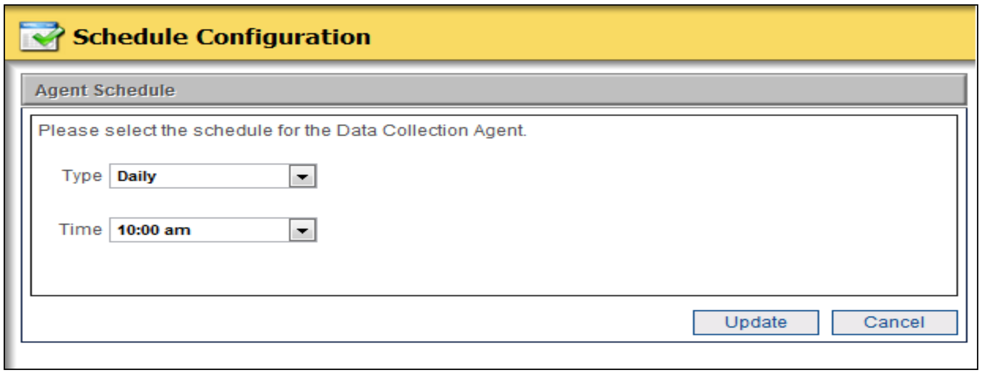
NTP Software Data Collection Agent Schedule Configuration

To configure the schedules of NTP Software Data Collection Agent, do the following:

1. In the left-hand main menu, click **Schedule** to open the **Schedule Configuration** window.



2. In the **Agent Configuration** dialog box, select daily/weekly/monthly scan schedule and set the time to run the scan.



> **NOTE:** As scans use a lot of network resources during the scanning operation, it is strongly recommended to run weekly or monthly scans instead of daily scans.

3. To run forced scan, navigate to the installation folder and run the *DataAgent.exe*

   For example: To run Hitachi scan, in the command prompt navigate to installation folder,

   C:\Program Files\NTPSoftware\Data Collection Agent\HNAS>

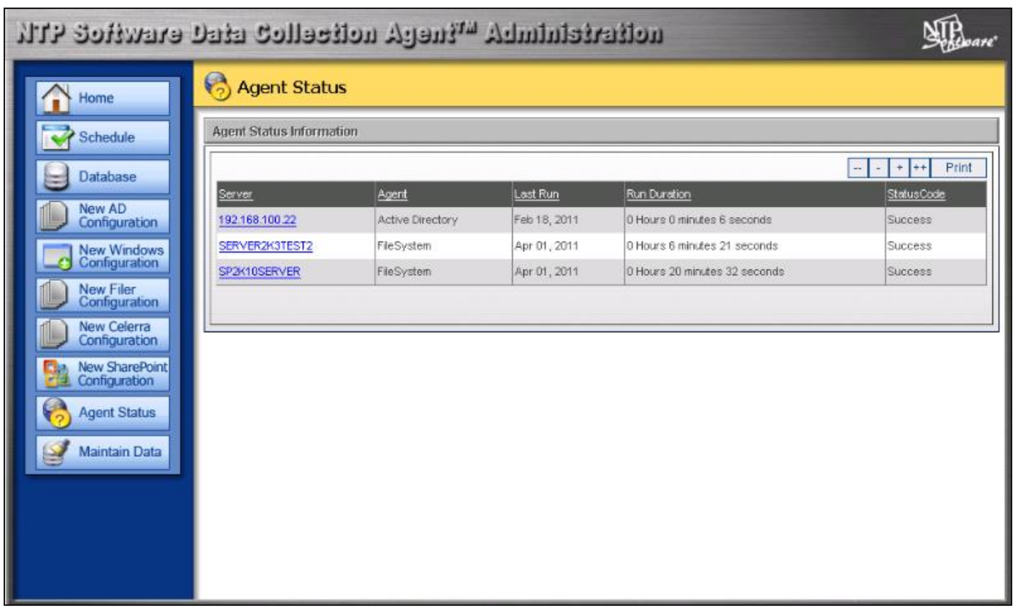
   Then execute the command *DataAgentHNAS.exe*

Viewing NTP Software File Reporter Agent Status Utility

NTP Software File Reporter is an agent-based application. Each server in your environment has its own NTP Software Data Collection Agent, which is responsible for scanning, processing, and reporting the individual server's data to the database. Network communication problems can cause an agent to fail to report its complete dataset to the database. NTP Software provides a status utility to help determine whether a communication problem might have occurred, and if so, where it happened.

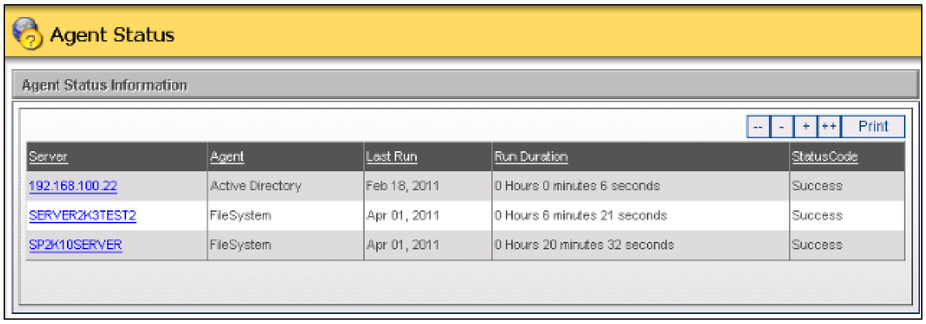
To view the agent status utility, do the following:

1. In the left-hand main menu, click **Agent Status**. The Agent Status Information screen shows the date and duration of the last successful scan of each server on the network.



NOTE: Click the headers of the view displayed in the figure to sort the data in ascending or descending order.

2. In the **Agent Status Information** dialog box, click a server name to open its details page.



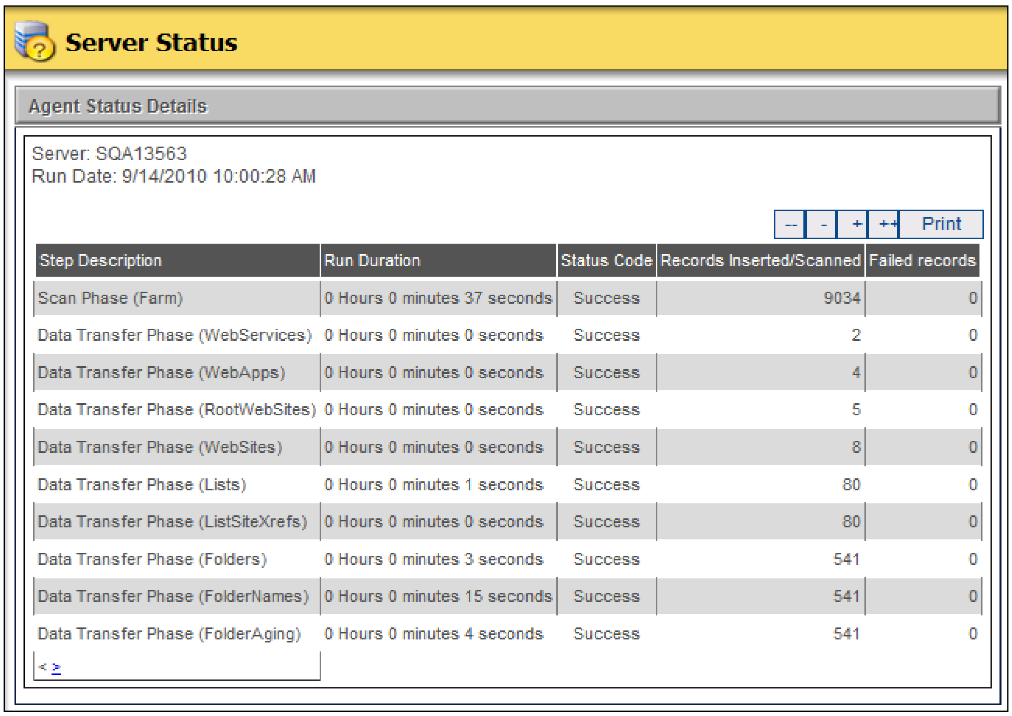
Agent Status

Agent Status Information

-- - + ++ Print

Server	Agent	Last Run	Run Duration	StatusCode
192.168.100.22	Active Directory	Feb 18, 2011	0 Hours 0 minutes 6 seconds	Success
SERVER2K3TEST2	FileSystem	Apr 01, 2011	0 Hours 6 minutes 21 seconds	Success
SP2K10SERVER	FileSystem	Apr 01, 2011	0 Hours 20 minutes 32 seconds	Success

3. In the **Agent Status Details** window, you can view all the scans that have run on that server.



Server Status

Agent Status Details

Server: SQA13563
Run Date: 9/14/2010 10:00:28 AM

-- - + ++ Print

Step Description	Run Duration	Status Code	Records Inserted/Scanned	Failed records
Scan Phase (Farm)	0 Hours 0 minutes 37 seconds	Success	9034	0
Data Transfer Phase (WebServices)	0 Hours 0 minutes 0 seconds	Success	2	0
Data Transfer Phase (WebApps)	0 Hours 0 minutes 0 seconds	Success	4	0
Data Transfer Phase (RootWebSites)	0 Hours 0 minutes 0 seconds	Success	5	0
Data Transfer Phase (WebSites)	0 Hours 0 minutes 0 seconds	Success	8	0
Data Transfer Phase (Lists)	0 Hours 0 minutes 1 seconds	Success	80	0
Data Transfer Phase (ListSiteXrefs)	0 Hours 0 minutes 0 seconds	Success	80	0
Data Transfer Phase (Folders)	0 Hours 0 minutes 3 seconds	Success	541	0
Data Transfer Phase (FolderNames)	0 Hours 0 minutes 15 seconds	Success	541	0
Data Transfer Phase (FolderAging)	0 Hours 0 minutes 4 seconds	Success	541	0

< >

IMPORTANT: If a scan did not complete successfully, the status utility shows a breakdown for each agent's status to help determine where the problem occurred.

NOTES:

- Clicking a server's name displays a full report about the scans that have run on that server.

- This report includes a description of the phase (whether scanning, data analysis, or data transfer), the time duration of the phase, and the phase status (whether Success or Failed).
- It also shows the number of records for a data transfer operation or scanned records for a scanning operation.
- Use the + ++ or -- - buttons to increase or decrease the number of records displayed per page.
- Use the Print button to obtain a hard copy of the results.

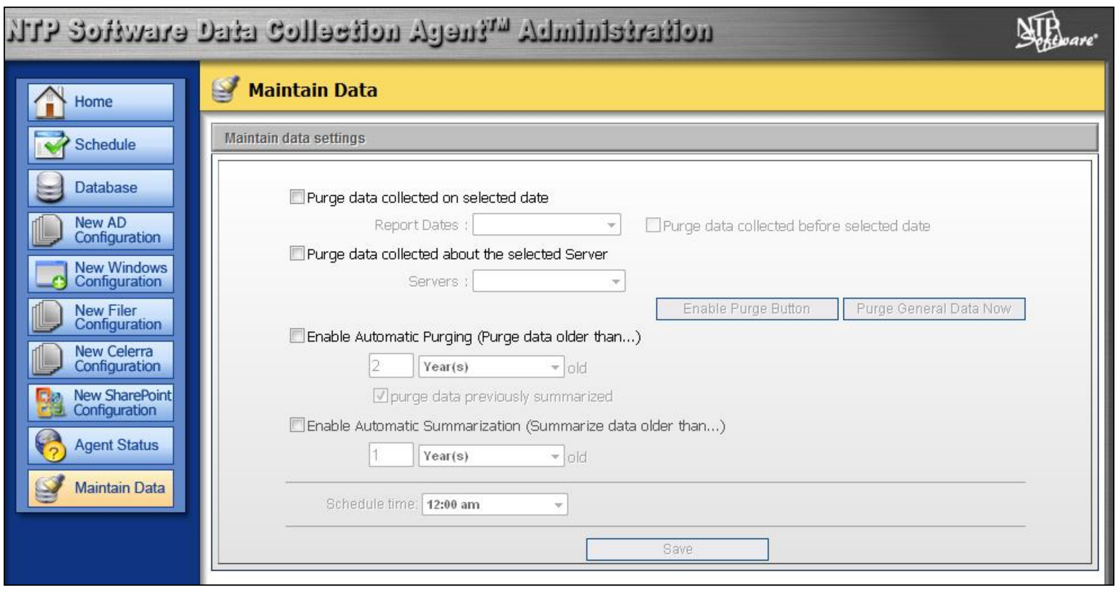
Purging the NTP Software File Reporter Database

By default, NTP Software File Reporter performs weekly scans on all of your enterprise servers with NTP Software Data Collection Agents installed. Because NTP Software does not impose size limits on the NTP Software File Reporter database, the database could grow extremely large over time. We recommend using the database purging utility routinely to clean your NTP Software File Reporter database.

NOTE: Purging data from the database also removes the data from report displays.

To purge NTP Software File Reporter database, do the following:

1. In the left-hand main menu, click **Maintain Data**.

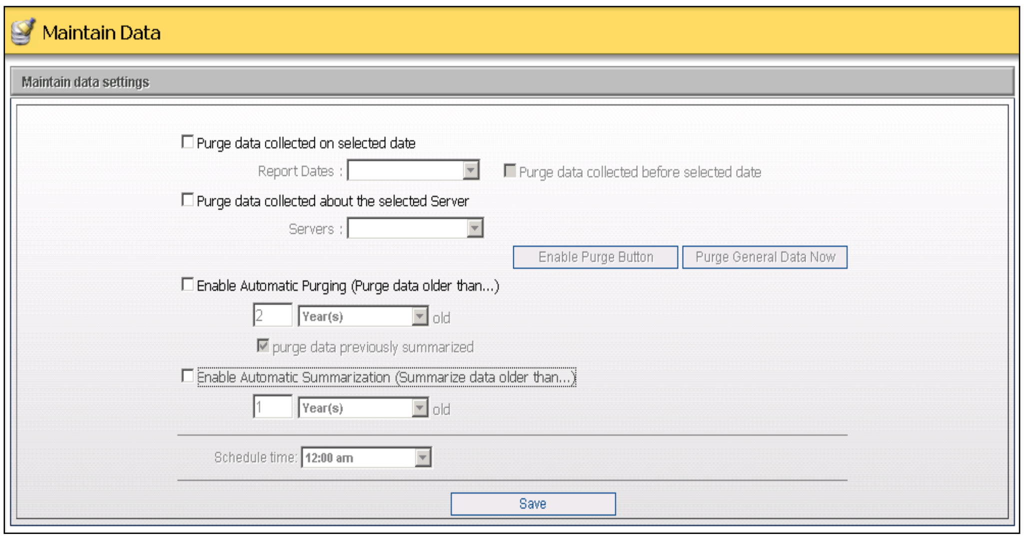


NTP Software File Reporter Database Maintenance offers four sets of criteria for purging data:

- Purging data collected on a selected date
- Purging all data collected about a selected server
- Enabling Automatic Purging (purge data older than a specific time period)
- Enabling Automatic Summarization (summarize data older than a specific time period)

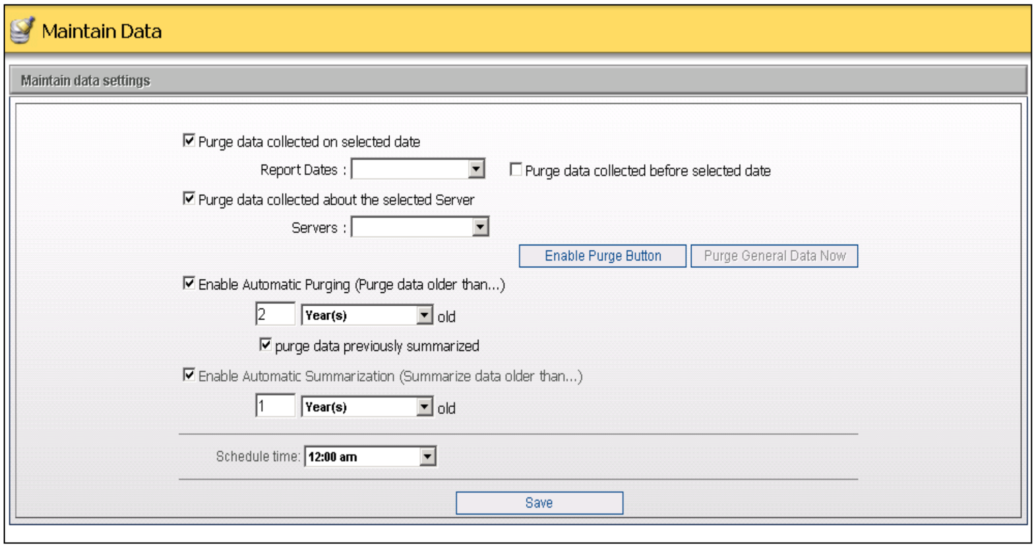
NOTE: The Automatic Purging and Automatic Summarization will execute on a daily basis at the time specified.

2. In the **Maintain Data Settings** window, select the purging criteria you want to apply based on the criteria sets specified previously. Click the **Save** button.



3. Press the **Enable Purge** button to enable the **Purge General Data Now** button.

NOTE: Because of the permanent nature of the data deletion, an administrator is required to enable the function before performing a purge. We also recommend performing a backup before any purge takes place.



4. Click the **Purge General Data Now** button to purge the data from the NTP Software File Reporter Database.

NOTE: Verify your selections and make changes as needed before clicking this button.

About NTP Software

NTP Software puts users in charge of their file data and is the only company providing file data management solutions that deliver all of the enterprise-class features needed to understand, manage, monitor, and secure file data completely. NTP Software is a global leader and has been chosen by the majority of Fortune 1000 companies and thousands of customers in private and public sectors for providing leadership through superior solutions, professional services, experience, and trusted advice. NTP Software delivers a single solution across the entire data storage environment, from individual files and users to an entire global enterprise across thousands of systems and sites. NTP Software reduces the cost and complexity associated with the exponential growth of file data and is located on the web at www.ntpsoftware.com.

NTP Software Professional Services

NTP 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 NTP Software Representative at 800-226-2755 or 603-622-4400.

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