
Actifio Report Manager Deployment Guide

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Preface

About This Guide

This guide describes how to plan, deploy, and configure the Actifio Report Manager using an OVA template or VHDX image.

Intended Audience

This guide is intended for system administrators who are responsible for the Actifio Report Manager deployment. This guide assumes basic familiarity with storage concepts, and knowledge on Actifio CDS, and Sky appliances.

Product Version

The information in this guide is current as of Actifio Report Manager version 7.0.5.

Organization of This Guide

This guide includes the following chapters:

- **Chapter 1, [Report Manager Deployment Overview](#)**. Introduces Actifio Report Manager, and explains the available deployment options.
- **Chapter 2, [Deploying the Report Manager](#)**. Provides instructions on how to deploy the Actifio Report Manager.
- **Chapter 3, [Configuring the Report Manager](#)**. Provides instructions on how to configure the Actifio Report Manager to establish the communication with Actifio CDS, and Sky Appliances.
- **Chapter 4, [Migrating Report Data from Prior Versions of Report Manager](#)**. Provides instructions on how to migrate your existing report data to the new Report Manager
- **Chapter 5, [Accessing the Report Manager](#)**. Provides instructions on how to access Actifio Report Manager using a Web browser.

Related Documentation

- ***Actifio Report Manager Release Notes***. Provides information about what is new and changed in this release, as well as workarounds for known issues and limitations.
- ***Using the Actifio Report Manager***. Provides information on how to use your Actifio Report Manager.
- ***Actifio Report Manager - Schema Definitions PostgreSQL DB***. Describes the database table definitions that Actifio Report Manager uses to store records.

Actifio Support and Service

Access these locations for help with your Actifio product suite:

Customer Support Numbers	U.S. Toll-Free Number: 1.855.392.6810 From Anywhere: +1.315.261.7501 Australia: 0011 800-16165656 Germany: 00 800-16165656 New Zealand: 00 800-16165656 UK: 0 800-0155019
Customer Support Email	support@actifio.com
Customer Support Portal	https://now.actifio.com When prompted, enter the user name and password provided by your Actifio representative. During the configuration and initialization of your Actifio appliance, your Actifio representative provided you with a user name and password for the Actifio Now customer portal.
General Information	http://www.actifio.com

The Actifio Now portal offers a knowledge-base that contains answers to common questions and solutions to known problems. It also contains an extensive Content Library of product related documents such as user guides, operational manuals, and technical white papers.

Before You Call Customer Support

Make sure you have access to your Actifio Report Manager and have the following information available when you call:

- The Actifio Report Manager version number.
- The Actifio CDS or Sky Appliance version number.

1 Report Manager Deployment Overview

The Actifio Report Manager is a web based reporting service that enables you to generate various reports for Actifio appliances (Actifio CDS and Actifio Sky). This is an independent component that runs on its own server. The Report Manager must be cross-registered with the Actifio appliances (Actifio CDS and Actifio Sky) from which it collects the data. This document describes the detailed procedure to install and configure the Actifio Report Manager.

Note: Existing Report Manager Users: Starting with this release, Actifio Report Manager uses a new reporting engine to make use of most advanced computing and reporting capabilities. To retain the data collected by your existing Report Manager, see [Chapter 4, Migrating Report Data from Prior Versions of Report Manager](#).

Actifio Report Manager can be deployed in either VMware or Hyper-V environments, see the section [Deploying the Report Manager](#) on page 3.

Note: Existing systems running RM 6.2.0 or higher can upgrade directly to RM 7. 0.3

2 Deploying the Report Manager

Actifio Report Manager offers multiple deployment options for provisioning your requirements.

Topics:

- [Deploy the Report Manager OVA on VMware on page 3](#)
- [Deploy the Report Manager on a Standalone Hyper-V on page 7](#)
- [Deploy the Report Manager on a Hyper-V SCVMM on page 10](#)
- [Upgrading the Report Manager on page 14](#)

Minimum System Requirements

Following are the minimum system requirements for Actifio Report Manager deployment:

Component	VMware	Hyper-V
Deployment Environment	<ul style="list-style-type: none">• VMware ESX 5.5 or higher• vCenter	<ul style="list-style-type: none">• Hyper-V• System Center Virtual Machine Manager (SCVMM)
Memory	8 GB	8 GB
CPU	2 CPU	2 CPU
Disk Size	250 GB VMDK	250 GB VHD
Network	<ul style="list-style-type: none">• ADHD port - 5103• HTTP port - 443	<ul style="list-style-type: none">• ADHD port - 5103• HTTP port - 443

Deploy the Report Manager OVA on VMware

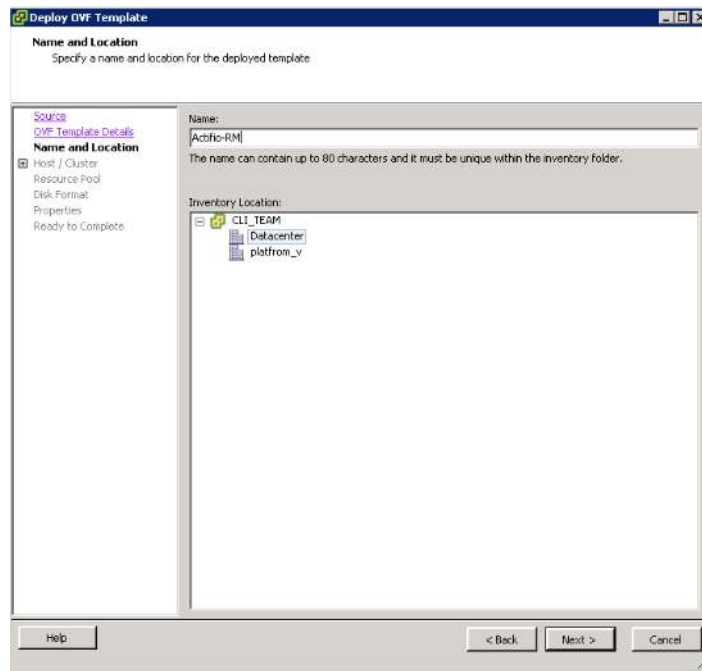
Perform the following steps to deploy the Actifio Report Manager using an OVA file. This procedure uses VMware vSphere client's Deploy OVA Template wizard to create a Report Manager VM:

1. Download the Actifio Report Manager OVA template from Actifio Support portal. For assistance, contact your Actifio representative.
2. Log on to the VMware vCenter or ESX Server using vSphere Client.
 - o Enter the host name or IP address of a vCenter Server system or ESXi host, depending on what you want to access.
 - o Enter a user name and password.
 - o Click **Login**.

3. In the vSphere Client, select the ESX Server on which the Report Manager OVA template will be deployed and then select **File > Deploy OVF Template** from the **File** menu.

The Deploy OVF Template wizard appears.

4. Specify the source location, browse your file system for the Report Manager OVA template in the source location wizard and click **Next**.
5. Review the **OVA Template Details** and click **Next**.
6. Navigate to, and select the resource pool where you want to deploy the OVA template and click **Next**.

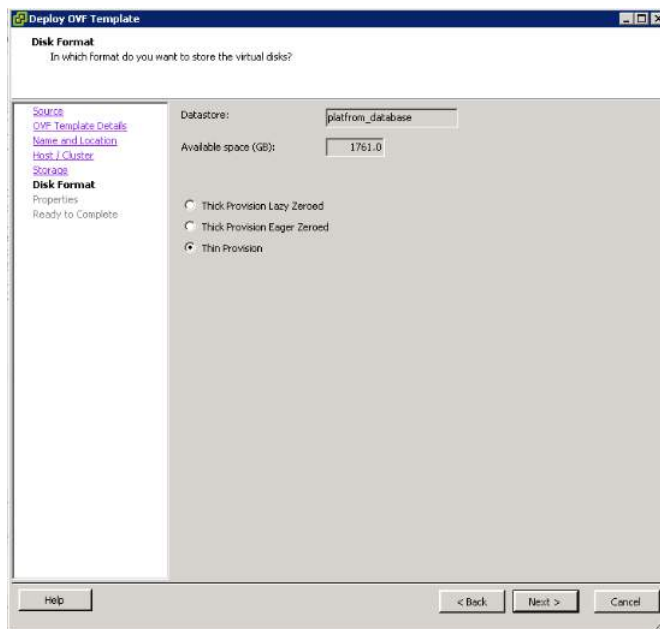


Naming the VM and Selecting Resource Pool for OVA

Optional. Edit the name and select the Datastore location within the inventory where the VM file resides, and then click **Next**. The Disk format template displays the Datastore information.

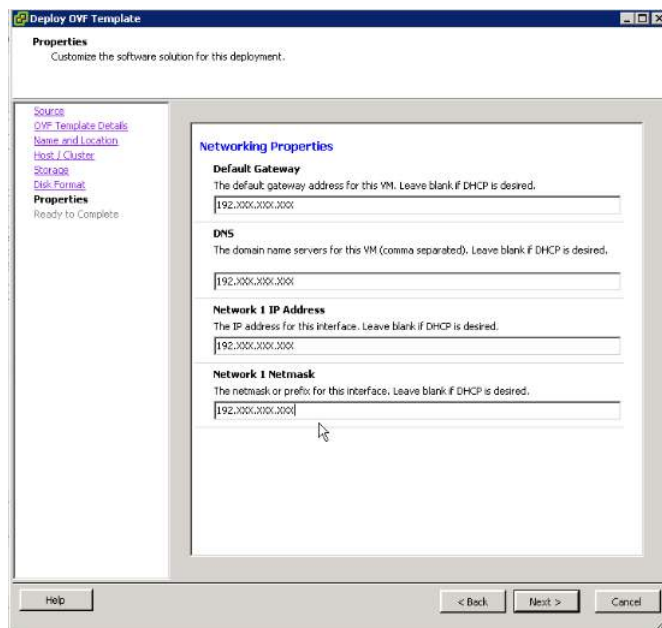
7. On the **Host / Appliance** page, select a host or appliance where you want to deploy the OVA Template and Click **Next**.
8. Select a Datastore to store the deployed OVA template and click **Next**.
9. Select **Thin Provision** disk format and click **Next**.

Use this format to save storage space. For the thin disk, provision as much datastore space as the disk would require based on the value that you enter for the disk size. However, the thin disk starts small and at first, uses only as much datastore space as the disk needs for its initial operations.



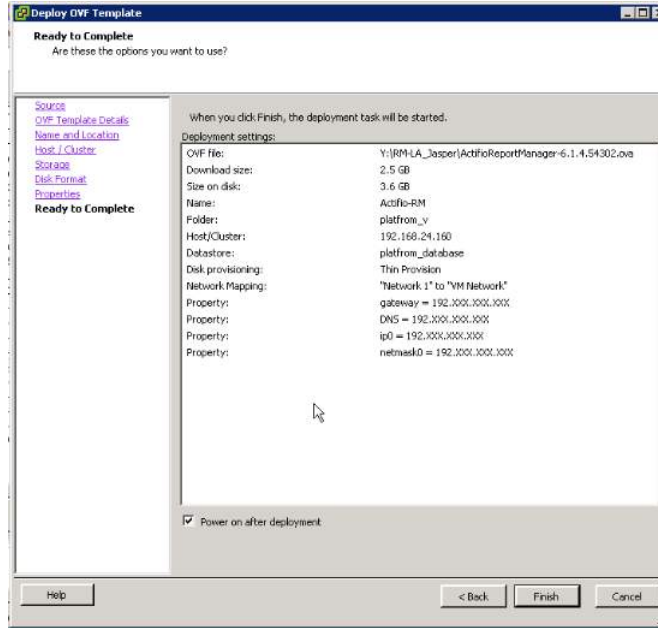
Selecting the Disk Format

10. If you want to assign a static IP to your Report Manager VM, provide network configurations, static IP from your network IP range. Click **Next**.



Configuring Network for vCenter in Non-DHCP Mode

11. On Ready to Complete page, review the setup details and select the **Power on after deployment** option. Click **Finish** to complete the deployment process.



The Ready to Complete Screen

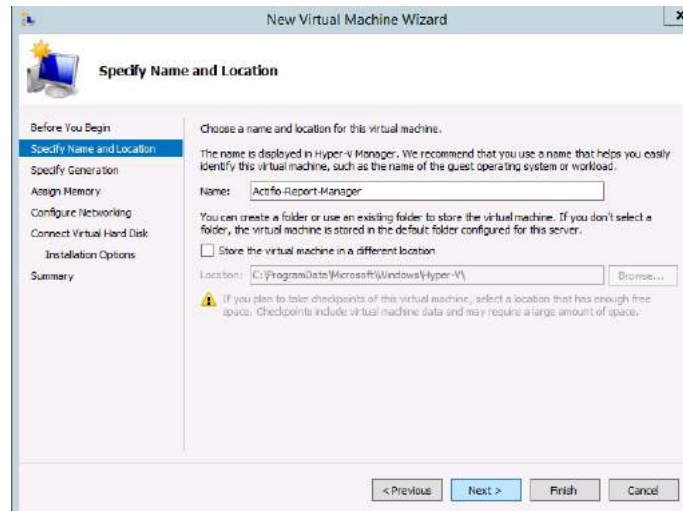
12. At this stage, the VM is powered on and the Report Manager service starts.
It can take a few minutes for all the services to start. Once all the services are started, you will see the IP address of the VM on the vSphere Client screen.
13. Click **OK** in the confirmation dialog.
At this point, the Report Manager VM is up and running using the automatically assigned IP address by DHCP. However, in almost all installations the Report Manager is assigned IP address and host name, which is used for further configurations of the Report Manager.
14. Go to [Chapter 3, Configuring the Report Manager](#) to provide the configuration details.

Deploy the Report Manager on a Standalone Hyper-V

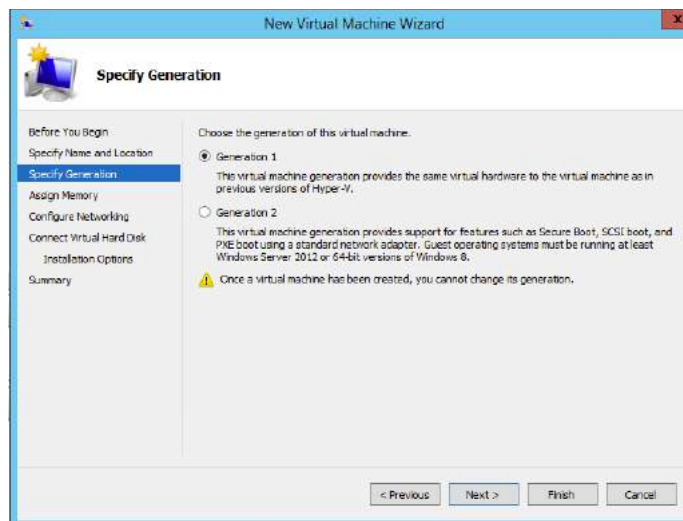
This section describes how to deploy Actifio Report Manager on Microsoft Hyper-V standalone server.

Once an Actifio representative has provided a copy of the Actifio Report Manager VHDX file and it has been placed in a location accessible by the Hyper-V Hypervisor that will host the Actifio Report Manager appliance: Deploy the Actifio Report Manager VHDX like any other Hyper-V VM.

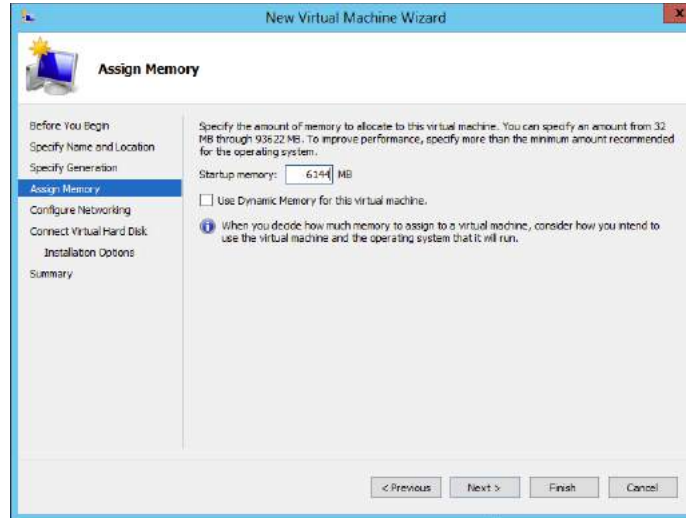
Note: Because the Actifio Report Manager is deployed like any other VHDX, only the steps in the deployment procedure of particular interest to the Actifio Report Manager installer are called out.



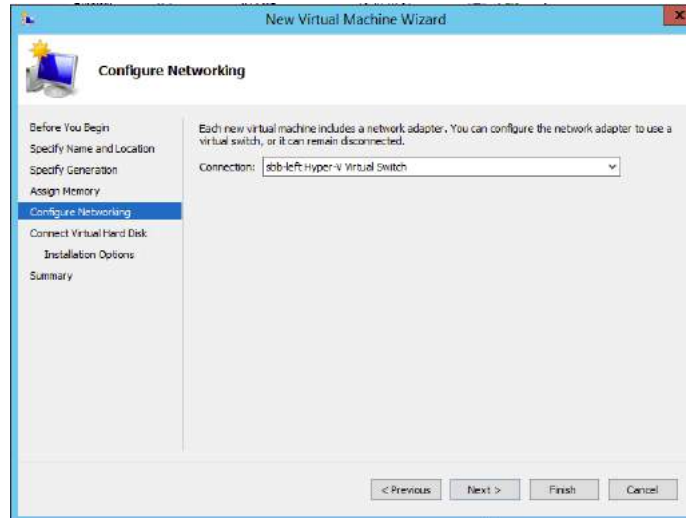
1. When prompted, give the virtual machine a unique name. This is the name Hyper-V will use. It is not the name displayed in the Actifio Report Manager user interface.



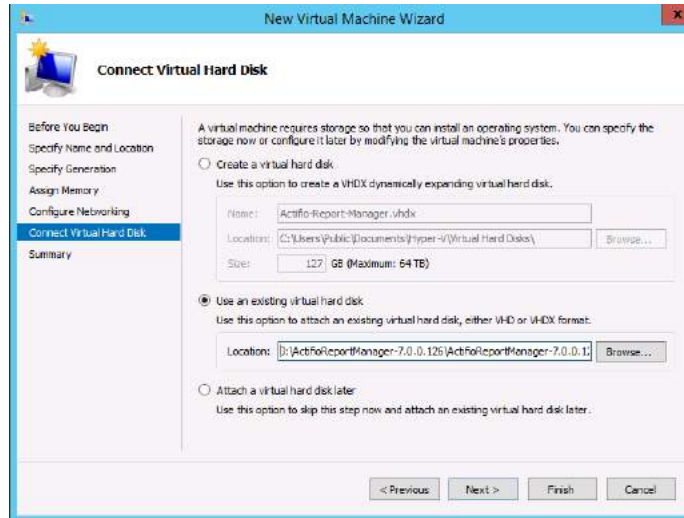
2. When prompted to specify a Generation, select **Generation 1**.



3. Set **Startup Memory** to match that of your requirements. Suggested memory is 8 GB
4. Check the **Use Dynamic Memory for this virtual machine** option.



5. To configure networking, use a Hyper-V virtual switch that grants access to your network.



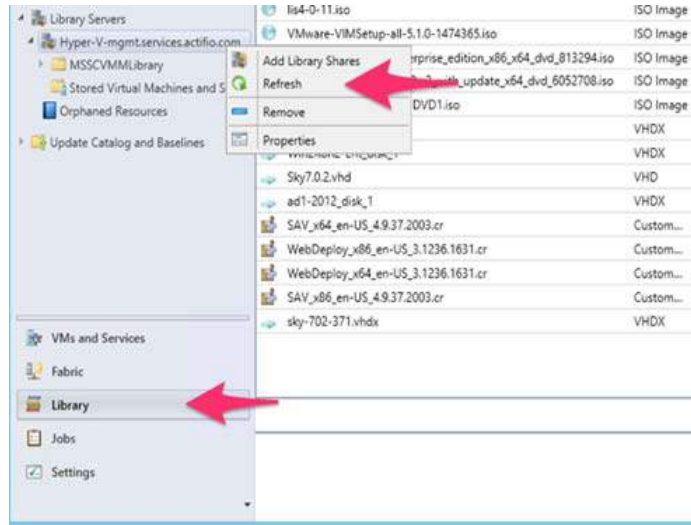
6. When prompted to **Connect Virtual Hard Disk**, use the Actifio Report Manager VHDX as the boot image:
Select **Use an existing virtual hard disk**
For location, browse to or enter the path to the Actifio Report Manager VHDX image.
7. Click **Finish**.

Deploy the Report Manager on a Hyper-V SCVMM

This section describes how to deploy Actifio Report Manager on Microsoft System Center Virtual Machine Manager (SCVMM). Once an Actifio representative has provided a copy of the Actifio Report Manager VHDX file and it has been placed in a location accessible by the Hyper-V Hypervisor that will host the Actifio Report Manager appliance: Deploy the Actifio Report Manager VHDX like any other Hyper-V VM.

Perform these steps on SCVMM running on Windows 2012 R2:

1. Copy the Actifio Report Manager VHDX file into the VMM Library location and launch the SCVMM.
2. Refresh the Library:
Select **Library** in bottom left pane, expand **Library Servers** and right click the server and **Refresh**.



3. Select **VMs and Services** in bottom left pane.



4. Select **Create Virtual Machine** option.



- Browse to select the Actifio Report Manager VHDX file from the Library and select **Next**.



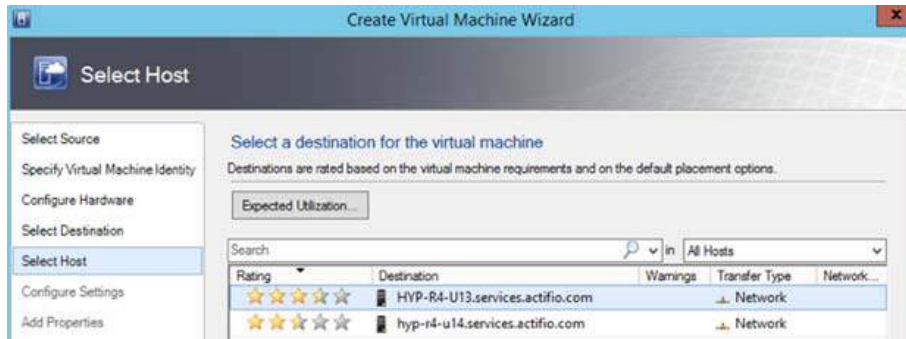
- In the next step, name your Actifio Report Manager VM and click **Next**.
- Configure CPU/Processors and memory requirements and click **Next**.



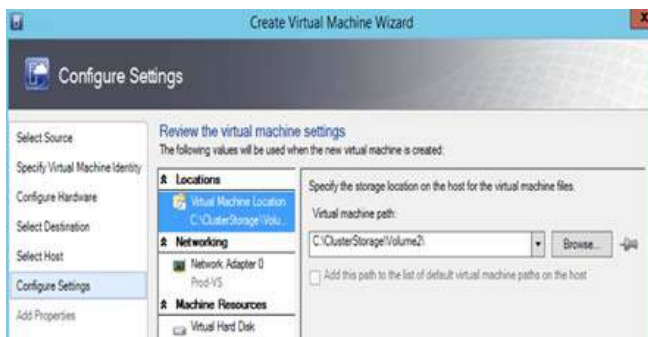
- Place the VM where you want it to reside and click **Next**.



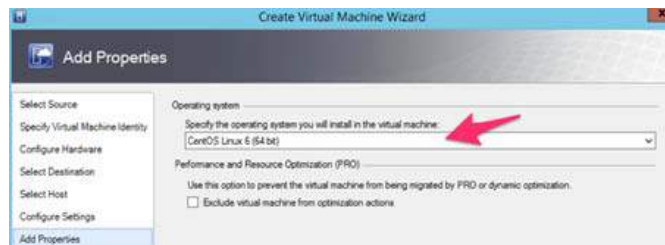
9. Select the required Hyper-V server from the list and click **Next**.



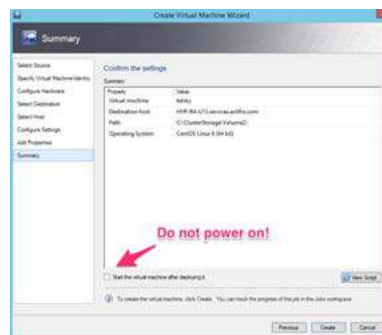
10. Select the Storage location for the OS and click **Next**.



11. Select **CentOS Linux 6 (64-bit)** for operating system and click **Next**.



12. Review the configurations and select create, but Do Not Power on.



Your Report Manager deployment on Hyper-V on SCVMM is completed.

Assigning a static IP to the Report Manager

Once you finish the deployment, you need to power on the Actifio Report Manager and assign a static IP to access it over the network.

Follow these steps to assign a static IP:

1. Open the Report Manager Hypervisor console and press **ALT+F2**.
The Network Configuration wizard appears.
2. Press **3** to highlight the **Configure Networking** option and press **Enter**.
3. The Device Configuration option is highlighted by default, press **Enter**.
4. The **eth0 (eth0)-hv_netvsc** option is highlighted by default, press **Enter**.
5. Network Configuration window appears (move the cursor using navigation arrows).
 - o Navigate to **Use DHCP** option and press the space bar to enable assigning static IP.
 - o Enter a valid Static IP, Netmask, Default Gateway IP and Primary DNS server (Secondary DNS server is optional) in the corresponding fields.
 - o Navigate to **Ok** option and press **Enter**.
 - o Navigate to **Save&Quit** option and press **Enter**.
6. Now the static IP is assigned with your Actifio Report Manager, and can be accessed over the network.

Go to [Chapter 3, Configuring the Report Manager](#) to provide the configuration details.

Upgrading the Report Manager

Note: Existing systems running RM 6.2.0 or higher can upgrade directly to 7.0.5

Perform the following steps to upgrade the Report Manager.

1. Obtain the Actifio Report Manager upgrade file from your Actifio representative.
2. Open a browser, and in the address space enter the IP address of the Report Manager:
https://<RM IP address>/
3. From the Report Manager Login window, enter the superuser credentials, then click **Log In**.
4. Navigate to **Manage** and select the **Upgrade** option.
The Upgrade window appears.
5. From the Upgrade window, you can either:
 - o Browse to the location of the **patch-ARMx.x.x.xxxxx.gpg** upgrade file and upload it into this window.
 - o Directly drag and drop the **patch-ARMx.x.x.xxxxx.gpg** upgrade file onto this window.
6. Report Manager begins the upload process. A progress bar appears to show the status of the upload. The file upload sequence undergoes three phases: file upload, file unpack, and file extraction.
7. When the file upload is complete and the upgrade image has been extracted and listed in the Upgrade window. Select the upgrade image and click **UPDATE REPORT MANAGER**.
The upgrade process may take 5-10 minutes to complete. During this process Report Manager is not accessible to perform any operations.

Note: Clear your browser caches after the upgrade.

3 Configuring the Report Manager

Note: This chapter is applicable only for the new installations. You can skip this chapter if you are upgrading your existing Report Manager to a newer version.

This chapter provides instructions on how to configure the Actifio Report Manager to establish communication with Actifio CDS and Sky Appliances.

To establish communication between the Actifio CDS and Sky appliance and the Report Manager, provide the Actifio appliance, and network configuration details in the Report Manager installer page:

1. Open a web browser to `http://<Assigned IP Address of the Report Manager>`. The Report Manager Installer page appears.
2. **Customize Network Configuration** check-box options: All fields are mandatory.

Check this option only if the Report Manager gets the IP through DHCP during deployment, and you want to provide a static IP for Report Manager.

Un-check this option if you have already provided the network configuration details during deployment or you want to proceed with the DHCP IP.

By default this option is unchecked.

actifio Report Manager Installer
Radically Simple

Customize Network Configuration
All Items marked with (*) are required.

Report Manager IP Address *

Report Manager Host Name *

DNS Server *

Subnet Mask *

Gateway *

Timezone

Default CDS/Sky Appliance

DNS Name or IP Address *

Admin Password *

Configuring the Report Manager

Note: Steps 3 to 6 are optional if the Report Manager is already configured over the network, you may leave the **Customize Network Configuration** check-box un-checked.

3. Enter the IP address of the Report Manager in the **Appliance IP** field. This must be a valid static IP address that is assigned to the Report Manager.
4. Enter the host name in the **Appliance Name** field. The appliance name is the host name assigned to the Report Manager VM.
5. Enter the IP addresses of the **DNS Server**, **Subnet Mask**, and **Gateway** in the corresponding fields.
6. Select your preferred timezone from the **Timezone** drop-down list.
7. Enter the IP address/FQDN of the Actifio CDS or Sky appliance that you want the Report Manager to pair with by default in **IP Address/FQDN** field.

Note: If you want to migrate data from an older version (Actifio Report Manager 6.1.2.50327) to the new Report Manager version (Actifio Report Manager 7.x.x), ensure that the Actifio Appliance set as authentication server in the older version must be the default appliance while configuring the new Report Manager.

8. Enter the Admin password of Actifio CDS or Sky appliance in **Admin Password** field.
This appliance is marked as authentication server for Actifio Report Manager, any non superuser login will be authenticated against this server.
9. Optionally, use the **Test** button to verify whether the provided Actifio CDS or Sky appliance details are correct.
10. Click **Configure** to update the configuration changes. The Report Manager installs and reboots automatically. This process may take about 15 minutes.

After the reboot, the Report Manager is ready to use. Now you can connect to the Report Manager from any supported browser using `https://<Report Manager IP address>`

4 Migrating Report Data from Prior Versions of Report Manager

This chapter provides instructions on how to migrate your existing report data to a new Report Manager.

Migration Considerations

The migration process is optional, use this process only when you want to transfer your existing report data to the new Report Manager. Any existing data on the new Report Manager will be wiped out by this process, and it is only recommended immediately after installation of a new Report Manager. If you do not want to retain your earlier data, you can skip this process and simply install the new Report Manager.

Note: Existing Report Schedules are not migrated as part of the migration process, you need to re-create them in the new version of Report Manager after migration.

Actifio CDS/Sky appliance purges data after 90 days, but the previous Report Manager versions prior to 6.2.0 retains data for one year by default. Migration is required for customers those who want to report on data older than 90 days such data has been captured in their previous report manager.

Supported Releases

The migration process is compatible from Actifio Report Manager version 6.1.2 and higher. If you are using any of the previous versions of the Report Manager, first you need to upgrade to 6.1.2 and run the below mentioned scripts to pack the data in existing Report Manager.

Note: If you are using Actifio Report Manager version 6.2 or higher, migration process is not required, you can simply upgrade to the latest version.

Migrating Data From Previous Versions of Report Manager

The migration process consists of following steps:

- [Steps to be Performed with Existing Report Manager System](#)
- [Steps to be Performed with a New Report Manager System](#)

Steps to be Performed with Existing Report Manager System

Note: Before proceeding with data migration, ensure that your existing Report Manager is upgraded to Report Manager version 6.1.2

1. Obtain the migration file (**rm_data_migration.tgz**) from the Actifio representative.
2. Log on to your existing Report Manager as root user, and upload the migration file to **root** directory.

Note: The default password for root user is "password" unless it is changed.

3. Execute the following command to unpack the migration file.

`tar xvfz rm_data_migration.tgz`

A directory **`rm_data_migration`** is created under the **`root`** directory

4. Run the export script using the following command:

`sh /root/rm_data_migration/export_rm_repo.sh`

Once you run this command a new file (**`hf-RM70.x.x.tgz`**) is created under the **`/act/hotfix/stage/`** directory, this file contains your existing Report Manager's data.

5. Download the file (**`hf-RM70.x.x.tgz`**) to your local machine.

Now the existing report data is packed and available for the new Report Manager.

Steps to be Performed with a New Report Manager System

1. Log on to your new Report Manager with superuser or user with administrative privileges.
2. Navigate to **Manage** and select the **Upgrade** option.
The upgrade page appears.
3. Use the Browse option to upload the file (**`hf-RM70.x.x.tgz`**) to your new Report Manager. Optionally you can use the drag and drop option to upload the file.
4. The upgraded file is listed in the upgrade page.
5. Select the uploaded file and click **Upgrade**.

Now your previous report data is available with the new Report Manager.

6. Perform data synchronization between Actifio Appliances (Actifio CDS and Actifio Sky) and the Report Manager systems to bring reporting data up-to-date.
7. Assigning the Authentication Server (optional):

An authentication mechanism is introduced in Report Manager, which allows existing Actifio appliance (CDS and Sky) users to access the Report Manager using the same credentials. To enable this, an Actifio appliance must be added as an authentication server to the Report Manager.

Choose the authentication server based on the Default Actifio Appliance used in the Report Manager configuration:

Scenario 1: If the appliance exists in the migrated data, then the appliance is common to both the old and the new version of Report Manager. Hence, the Actifio appliance is selected as the authentication server by default.

Scenario 2: If the appliance does not exist in the migrated data, then manually select one of the appliance from the imported list as the authentication server.

See the Report Manager User guide to configure Authentication Server.

5 Accessing the Report Manager

Topics:

- [Accessing the Report Manager through the Actifio Desktop](#)
- [Accessing the Report Manager through a Web Browser](#)

Supported Browsers

The Actifio Report Manager can be accessed in these browsers:

Browser	Supported Versions
Microsoft Internet Explorer	8 or higher
Mozilla Firefox	27.0 or higher
Google Chrome	40.0 or higher
Apple Safari	7.0 or higher

Accessing the Report Manager through the Actifio Desktop

Actifio Desktop is the graphical user interface of Actifio CDS/Sky appliances. Perform the following steps to access your Actifio Report Manager:

Note: To access the Report Manager from the Actifio Desktop the desktop version should be 6.2.1 or higher.

1. Open your Actifio Desktop application.
2. Enter the user name, password, appliance IP for which Report Manager is configured
3. Click **Login**.
4. Click on the Report Manager icon at the bottom of the screen to launch the Report Manager, Actifio Report Manager login screen appears in your default browser.
5. Enter your user name and password and click **Login**. The Report Manager supports the following user login types:

superuser: The superuser login allows you to perform all administrative tasks such as adding and deleting appliances, changing authentication server, data sync scheduling, etc. The superuser login is enabled by default with "superuser" as default ID and password. To change the default password, See **Using the Actifio Report Manager**.

Existing Appliance (CDS/Sky) Users: All existing users of Actifio Appliances can log on to the Report Manager using their Actifio appliance login credentials. *These user accounts are activated only after adding the Actifio Appliance as an authentication server.*

Note: All administrative tasks can be done by superuser or existing Actifio appliance users with administrative privileges.

Accessing the Report Manager through a Web Browser

Perform the following steps to access your Actifio Report Manager:

1. Open a Web browser and type the Report Manager URL.
The URL must be in the following format: (**https://<Report Manager IP>**)
2. On the login screen, enter your user name and password and click **Login**.

Actifio Report Manager supports the following user login types:

- o superuser
- o Existing Actifio Appliance Users

superuser: The superuser login allows you to perform all the administrative tasks such as adding and deleting appliances, changing authentication server and data sync scheduling etc. The superuser login is enabled by default with "superuser" as default ID and password. To change the default password, See **Using the Actifio Report Manager** guide.

Existing Appliance Users: All the existing users of Actifio Appliances can log on to the Report Manager using their Actifio appliance login credentials. *These user accounts are activated only after adding the Actifio Appliance as authentication server.*

Note: All the administrative tasks can be done by superuser or existing Actifio appliance users with administrative privileges.
