Rocket | Arkivio ™

The Rocket Arkivio® Autoexplore Assessment Process

Overview

The Data Classification Assessment enabled by Rocket Arkivio provides all of the essential information storage managers need about their data and storage without the headaches. The solution installs in minutes, requires no agents, is high performance and has no impact on users access to data. The solution is lightweight and so easy to configure; it is all done on-line. This document describes the key steps to execute a successful Data Classification Assessment.

I. **Pre-Installation Preparation**

Prior to scheduling the Assessment Service, client will complete a Site Survey document which is designed to collect environmental data (number and type of servers; number, type and size/filecount of volumes; general description of desired info (e.g.: file age, file type, ownership,…)) and to provide client with environmental requirements. The completed Site Survey should then be reviewed with the client to address any questions.

II. **Standard Software Installation**

Once on site, the consultant will deploy and configure the Autoexplore product. This process includes the following:
1. Verify the server (W2K3,memory/disk, IIS, ASP,…) and environment configuration (DNS, Service Account permissions, NFS exports).
2. Install Arkivio Autoexplore components and verify successful set-up.

III. **Software Configuration**

After the installation is completed, consultant will:
1. Define the designated file servers through the Arkivio GUI as previously identified (in Site Survey).
2. Select CIFS/NFS shares to be managed in consultation with the client. The consultant will confirm proper connectivity to these hosts/file systems, including required access.
3. Create customer-defined File and Volume Groups. These are the logical groupings of files and volumes which provide the client with both the quantity and locations of particular types of data, and can include criteria such as file size, time since last access or update, type of file and file ownership.
   File Data Collection (FDC), which is the process by which file metadata is collected for the above selected shares, will be initiated and monitored. It is this data that is used to quantify the characteristics of the Data and Storage Groups, and will enable the simulation of policy actions.

IV. **Review and Refine Implementation**

After completion of the FDC, the consultant will:
1. Review initial findings with the partner and client to identify large collections of data in which the client is interested.
2. If necessary, make modifications or additions to the File, Volume Groups and File Type Groups and perform a manual Aggregation to apply these changes to reports.
3. Create a Data Management Policy to be able to show the benefits of data relocation.

V. **Generate and Export Reports / Simulate Policy Execution**

Once the data and storage classes have been established, the consultant will:
1. Generate a series of classification reports for the groups of data and storage.
2. Simulate the policy and share with the partner and client to demonstrate effectiveness of policy results. A backup of the database can be made to allow reports to be generated offsite as desired.

VI. **Filesystem Storage Assessment Report – Deliverable**

Based upon the results of the classification reports and the policy simulation report, a Filesystem Storage Assessment report will be created containing summary report pages and an analysis. This report can be used by the partner to provide consultative discussions with the client to explore options to meet the goals of the client in terms of reduction of backup windows or media, reduction in the growth of Tier-1 storage use, tiering of data based on its value, selection of data for long-term retention, or other criteria.