Filr 2017 Planning Worksheet

You need a thorough deployment plan before rolling out Filr 2017 in your production environment.

This worksheet reflects the planning flow in the *Best Practices: Planning Your Filr Deployment Guide*. You are welcome to customize it as needed for creating your roll-out plan.

Table of Contents

1   Identify and Engage the Stakeholders

1. Identify the following stakeholders within your organization.
   Their buy-in and input is critical for a successful deployment.

Organization	Name	Position	Contact Information
Management			
User Community			
Server Administration			
Database Administration			
Network Administration			
Directory Service Administration			
Security Administration			
<other>			

2. Fill in the rest of this worksheet as a stakeholder team.

2 Organizational Needs

2.1 Summarize All Current File-Access, File-Sharing Activities

1. Summarize the current file-access and file-sharing activities in your organization. Identify by name any technologies being used.

| |
| |

2.2 Key Business Drivers

1. Describe the key business drivers behind your organization's decision to deploy Filr.

Possible Driver	Details
Web access to corporate data.	
Mobile device access to corporate data.	
Desktop access to corporate data.	
Types of corporate data to expose.	
Access to personal data (home directories and/or Filr-based storage).	
Internal sharing of corporate files and folders.	
Internal sharing of personal files and folders.	
External sharing of corporate files and folders.	
External sharing of personal files and folders.	
<Add additional rows for other business drivers.>	

2.3 Applicable Security Policies

1. Identify all organizational policies regarding data access and sharing.

Area	Policy	Implications for Filr
Corporate data access		
Personal data access		
Corporate data sharing		

Area	Policy	Implications for Filr
Personal data sharing		

2.4 Applicable Compliance and Regulatory Standards

1. Identify all governmental or other standards that apply to data access and sharing.

Area	Standard	Implications for Filr

2.5 Branding Requirements

1. Identify all organizational user interface branding requirements.

2. Summarize them here and specify where to find pertinent details.

3   Use Case Scenarios

1. Describe each file access and sharing scenario (use case) within your organization.

2. Ensure that you cover such things as users needing to access, view, or modify files using their web browsers, workstation desktop, or mobile devices.

3. Articulate as much detail as possible at this point in the planning process.

3.1 Use Case 1

Description:	
Question	**Answer**
Approximately how many users will do this?	
Where will they be located when accessing Filr?	
What kinds of network connections will they use?	
What will they be doing with the files?	
Where are the file servers located that they will be accessing through Filr?	
About how many files are involved?	
What kinds of files are involved?	
What size are the files - smallest and largest?	
How often do the files on the file servers change?	
How often do the access rights to the files and folders on the file servers change?	
<other?>	

3.2 Use Case *X*

Description:	
Question	**Answer**
Approximately how many users will do this?	
Where will they be located when accessing Filr?	

Description:	
What kinds of network connections will they use?	
What will they be doing with the files?	
Where are the file servers located that they will be accessing through Filr?	
About how many files are involved?	
What kinds of files are involved?	
What size are the files - smallest and largest?	
How often do the files on the file servers change?	
How often do the access rights to the files and folders on the file servers change?	
<other?>	

4 Users and Groups

1. Identify where the users and groups in your organization who need Filr access are located in eDirectory and/or Active Directory.

4.1 NetIQ eDirectory 8.8 or Later (LDAP Users and Groups)

Tree Name:		
Configuration Details	Locations: Replicas:	
User/Group Container	Path:	
	LDAP Proxy User Name Password: Directory rights required:	
	Users	Number of Users: Home Directories: • LDAP attribute used: • Average number of files:
	Groups	Number of Groups:
User/Group Container	Path:	
	LDAP Proxy User Name Password: Directory rights required:	
	Users	Number of Users: Home Directories: • LDAP attribute used: • Average number of files:
	Groups	Number of Groups:

4.2 Active Directory with the Latest Support Pack (LDAP Users and Groups)

Forest Name:	
Configuration Details	

User/Group Container	Path:	
	LDAP Proxy User Name Password: Directory rights required:	
	Users	Number of Users: Home Directories: • LDAP attribute used: • Average number of files
	Groups	Number of Groups:
User/Group Container	Path:	
	LDAP Proxy User Name Password: Directory rights required:	
	Users	Number of Users: Home Directories: • LDAP attribute used: • Average number of files
	Groups	Number of Groups:

4.3 Non-LDAP Users and Groups Requiring Manual Creation

1. Identify any users and groups that you will need to create manually because they are not in your LDAP directories.

Name	Login ID	Email and other contact information, etc.
Groups		

4.4 Duplicate User or Group Accounts

1. Identify any users and/or groups that have the same name in both eDirectory and Active Directory.

2. Identify which directory service to change the name in and record the change in the applicable table cell.

eDirectory Context and Name	AD Context and Name	Renamed in Active Directory	Renamed in eDirectory

IMPORTANT: Before importing the users and groups you have identified and prepared, ensure that you are aware of the additional information and tips in "Planning Filr Users and Groups" in the *Planning and Deployment Best Practices Guide*.

5 LDAP Synchronization

1. Identify the requirements for synchronizing your directory services with Filr.

Does your LDAP identify store include nested groups?	□ Yes - At least two initial LDAP synchronizations are required to get group membership information properly established in the Filr database. □ No - One initial LDAP synchronizations should suffice to properly establish group membership information in the Filr database.
Summarize how frequently Filr-impacting information changes in your organization's identify stores.	
Specify the synchronization settings	Enable Scheduled Synchronization: □
	Every Day: or On Selected Days:
	At: or Repeat every:

6   File Servers/Network-Based Storage

1. Identify each server or network storage device that users need access to, including any servers containing home directories.

6.1   Server or Network Storage Device 1

DNS Name:	
IP Address:	
Type:	Circle One Windows 2003 R2, Windows 2008 R2, Windows 2012, or Windows 2012 R2 Open Enterprise Server (OES) 2 SP3 or OES 11 6.5.8 or later Network Attached Storage (NAS) with NetApp, EMC, and other Microsoft Active Directory joined NAS devices SAN
Physical Location:	
Location of Object in Directory Service:	

6.2   Server or Network Storage Device *X*

DNS Name:	
IP Address:	
Type:	Circle One Windows 2003 R2, Windows 2008 R2, Windows 2012, or Windows 2012 R2 Open Enterprise Server (OES) 2 SP3 or OES 11 6.5.8 or later Network Attached Storage (NAS) with NetApp, EMC, and other Microsoft Active Directory joined NAS devices SAN
Physical Location:	
Location of Object in Directory Service:	

7 Net Folder Servers

1. Identify each NSS volume or CIFS Share that users need access to, including those containing home directories.

   FYI - Filr accesses each volume/share and server/storage combination as a "Net Folder Server."
   Users access Net Folders (next item).

7.1 Net Folder Server 1

Net Folder Server Name:		
	Associated Server or Device DNS Name:	
	Volume/Share Path:	
	Proxy User FQDN:	
	Proxy User Password:	

7.2 Net Folder Server *X*

Net Folder Server Name:		
	Associated Server or Device DNS Name:	
	Volume/Share Path:	
	Proxy User FQDN:	
	Proxy User Password:	

8 Net Folders

1. Identify the main folders that contain organizational data that users and groups need access to.

2. Keep in mind the users and groups requiring access (see the next section).
   You might need to work in this and the next section in tandem, adjusting the Net Folder definitions as you identify the users and groups needing access.

3. Be sure to identify all of the information requested below. You will need it as you plan for Filr storage and Net Folder Synchronization.

8.1 Net Folder 1

Net Folder Name:		
	Associated Net Folder Server:	
	Path to Net Folder:	
	File Statistics:	Number of Files: Types of Files: File Size Range:
	Frequency of File Content Changes:	
	Frequency of Trustee/Access Rights Changes:	
	Roll-out Priority:	

8.2 Net Folder *X*

Net Folder Name:		
	Associated Net Folder Server:	
	Path to Net Folder:	
	File Statistics:	Number of Files: Types of Files: File Size Range:
	Frequency of File Content Changes:	
	Frequency of Trustee/Access	

	Rights Changes:	
	Roll-out Priority:	

9   Net Folder Access

1. For each Net Folder, identify the Users and/or Groups that are allowed access through Filr.

2. Verify that the Filr Roles they are expected to have are aligned with their NSS, NTFS, or SharePoint file system rights.

9.1   Net Folder 1

Net Folder Name:			
	User or Group Name	**Filr Role**	**Rights Required for Role Verified on Target File System**
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	

9.2   Net Folder *X*

Net Folder Name:			
	User or Group Name	**Filr Role**	**Rights Required for Role Verified on Target File System**
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	
		Viewer Editor Contributor	

10 Home Folders and Net Folder Servers (My Files)

1. Identify each group of home folders in your organization.
   Home folders are usually created automatically along with their associated users.

10.1 Home Folder Server 1

Home Net Folder Server Name:		
	Path to Home Folders:	
	File Statistics:	Number of Files: Types of Files: File Size Range:
	Roll-out Priority:	

10.2 Home Folder Server *X*

Home Net Folder Server Name:		
	Path to Home Folders:	
	File Statistics:	Number of Files: Types of Files: File Size Range:
	Roll-out Priority:	

11 Personal Storage (My Files)

1. If you decide to allow users to have personal storage on Filr, you should probably limit the amount of data that each user can store by setting a default quota and high-water mark.

2. You can also specify quotas for specific users or groups.

11.1 Default Data Quota (All Users)

11.2 User-Specific Personal Storage Quotas

User Name	Quota

11.3 Group-Specific Personal Storage Quotas

Group Name	Quota

11.4 High-Water Mark (All Users)

12 Searching (Content Indexing)

1. Ensure that you weigh indexing costs against the benefits of having searchable content.

Net Folder Name:		
	File numbers by Size:	Small (<500 MB): Medium (500 MB to 2 GB): Large (>2 GB):
	Estimated time to create index:	
	Estimated frequency of updates:	
Net Folder Name:		
	File numbers by Size:	Small (<500 MB): Medium (500 MB to 2 GB): Large (>2 GB):
	Estimated time to create index:	
	Estimated frequency of updates:	
Net Folder Name:		
	File numbers by Size:	Small (<500 MB): Medium (500 MB to 2 GB): Large (>2 GB):
	Estimated time to create index:	
	Estimated frequency of updates:	

13 Notifications (Email Integration)

1. Identify the settings required to set up notifications of Filr events through email.

Use Local Postfix Mail Server:	☐ Yes ☐ No
Protocol:	
SMTP Host:	
SMTP Port:	
Time Zone:	
SMTP User Name:	
SMTP User Password:	
Authentication required:	☐ Yes ☐ No
Allow sending email to all users:	☐ Yes ☐ No
Force HTTPS links:	☐ Yes ☐ No
Enable STARTTLS:	☐ Yes ☐ No
Connection Timeout (in seconds):	

14 System-Level Sharing Settings

1. Identify the maximum sharing privileges allowed through Filr.

Share Right	Yes/No
Allow Sharing with LDAP-imported Groups?	
Allow resharing?	
Share with Internal Users?	
Share with "All Internal Users" group?	
Share with External Users?	
Share with Public?	
Share using a File link?	

15 Net Folder Sharing Settings

1. For each Net Folder that needs sharing enabled, specify the users and/or groups allowed to share and their sharing rights (up to the maximum allowed above).
   (My Files users automatically have the sharing rights set above. No further configuration is required.)

15.1 Net Folder 1 Sharing Settings

Net Folder Name:			
	User or Group Name:		
		File Sharing Rights:	☐ Internal
			☐ External ☐
			☐ Public:
			☐ Using File Link:
			☐ Reshare:
		Folder-Sharing Rights:	☐ Internal:
			☐ External:
			☐ Public:
			☐ Reshare:

15.2 Net Folder *X* Sharing Settings

Net Folder Name:			
	User or Group Name:		
		File Sharing Rights:	☐ Internal
			☐ External ☐
			☐ Public:
			☐ Using File Link:
			☐ Reshare:
		Folder-Sharing Rights:	☐ Internal:
			☐ External:

	☐ Public:
	☐ Reshare:

16 Net Folder Just-in-Time Synchronization

1. Indicate whether just-in-time synchronization should be enabled.

   To use Just-in-Time Synchronization at the Net Folder Server or Net Folder level, it must be enabled at the system level, which is the default.
   If you choose to disable it at the system level, the administrator interface lets you select it for a Net Folder Server or Net Folder, but the feature won't actually work.

Just-In-Time Synchronization Global Setting	Enabled Disabled

17 Net Folder Server-Level Synchronization

1. Specify the Net Folder Server synchronization settings.
    There are overridden by any settings made at the Net Folder level.

17.1 Net Folder Server 1 Sync Settings

Net Folder Server Name:			
	Enable Scheduled Synchronization:	☐	
		Every Day: or On Selected Days:	☐ S M T W T F S
		At: or Repeat every:	_____ AM PM _____ hours
	Just-In-Time Synchronization Enabled:	☐	

17.2 Net Folder Server *X* Sync Settings

Net Folder Server Name:			
	Enable Scheduled Synchronization:	☐	
		Every Day: or On Selected Days:	☐ S M T W T F S
		At: or Repeat every:	_____ AM PM _____ hours
	Just-In-Time Synchronization Enabled:	☐	

18 Net Folder-Level Synchronization

1. Specify Net Folder synchronizations settings that need to differ from those set for the respective NF servers.

18.1 Net Folder 1 Sync Settings

Net Folder Name:			
	Use the Net Folder Server Synchronization Schedule	☐	
	or		
	Use the Synchronization Schedule Defined Below:	☐	
		Every Day: or On Selected Days:	☐ S M T W T F S
		At: or Repeat every:	_____ AM PM _____ hours
	Just-In-Time Synchronization Enabled:	☐	

18.2 Net Folder *X* Sync Settings

Net Folder Name:			
	Use the Net Folder Server Synchronization Schedule	☐	
	or		
	Use the Synchronization Schedule Defined Below:	☐	
		Every Day: or On Selected Days:	☐ S M T W T F S

		At: or Repeat every:	_____ AM PM _____ hours
	Just-In-Time Synchronization Enabled:	☐	

19 Administrative Access

1. Specify the Filr users who will need administrative access and rights.

Name	Contact Information	Administration Scope

20 Networking Support

20.1 IP Address Information

1. Identify and reserve static IP addresses for all your Filr, Search, and MySQL (if applicable) appliances.

General	Subnet Address: Subnet Mask: DNS Servers: Primary Gateway:	
Load Balancing	Type:	☐ L4 Switch ☐ Apache ☐
Filr 1	DNS Name: IP Address:	
Filr 2	DNS Name: IP Address:	
Filr 3	DNS Name: IP Address:	
Filrsearch 1	DNS Name: IP Address:	
Filrsearch 2	DNS Name: IP Address:	
MySQL	DNS Name: IP Address:	

20.2 Ports and Firewalls

1. Identify the IP ports used by all the Filr infrastructure components on your network.

2. Plan to set your network firewalls to allow network traffic as needed.

Service	Ports used
To L4 Switch/Load Balancer	80 443
To Filr	22 8443

	9443
To NetWare and/or OES Servers	524 389/636
To Windows Servers	136 137 138 139 445 389/636
To CIFS Storage	445
To NFS Storage	111 2049
To Mail Server	25 465/587
To MySQL or MS SQL	22 3306 9443
To Filrsearch	22 1188 1199 9443

21 Virtual Machines and VM Host Server

1. Leveraging the information gathered in this planning worksheet, identify the resources that your Filr, Filrsearch, and MySQL appliances and the associated virtual machine host servers require.

21.1 Filr Appliance 1

DNS Name:		
	Role:	☐ Direct end user service ☐ Synchronization and indexing only
	Disk Space Required:	/ : /vastorage: /var: /vashare: (see "Shared Storage" section)
	CPUs:	
	RAM:	

21.2 Filr Appliance *X*

DNS Name:		
	Role:	☐ Direct end user service ☐ Synchronization and indexing only
	Disk Space Required:	/ : /vastorage: /var: /vashare: (see "Shared Storage" section)
	CPUs:	
	RAM:	

21.3 Filrsearch Appliance 1

DNS Name:		
	Disk Space Required:	/ :

		/vastorage:
		/var:
	CPUs:	
	RAM:	

21.4 Filrsearch Appliance 2

DNS Name:		
	Disk Space Required:	/ :
		/vastorage:
		/var:
	CPUs:	
	RAM:	

21.5 MySQL Appliance (If an SQL Server Is Not Available)

DNS Name:		
	Disk Space Required:	/ :
		/vastorage:
		/var:
	CPUs:	
	RAM:	

21.6 VM Host Server 1

Host Server Platform:	
Version:	
Hosted Appliance DNS Names:	
Number of Physical Network Adapters:	

Disk Space:	
CPUs:	
RAM Required:	

21.7 VM Host Server *X*

Host Server Platform:	
Version:	
Hosted Appliance DNS Names:	
Number of Physical Network Adapters:	
Disk Space:	
CPUs:	
RAM Required:	

22 Storage

22.1 Dedicated Disk Space for Appliances

Total:	

22.2 Network-Based Shared Disk Space for /vashare

Total:	

23