

GlobalSync Installation Guide



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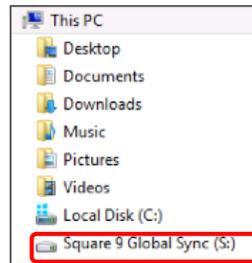
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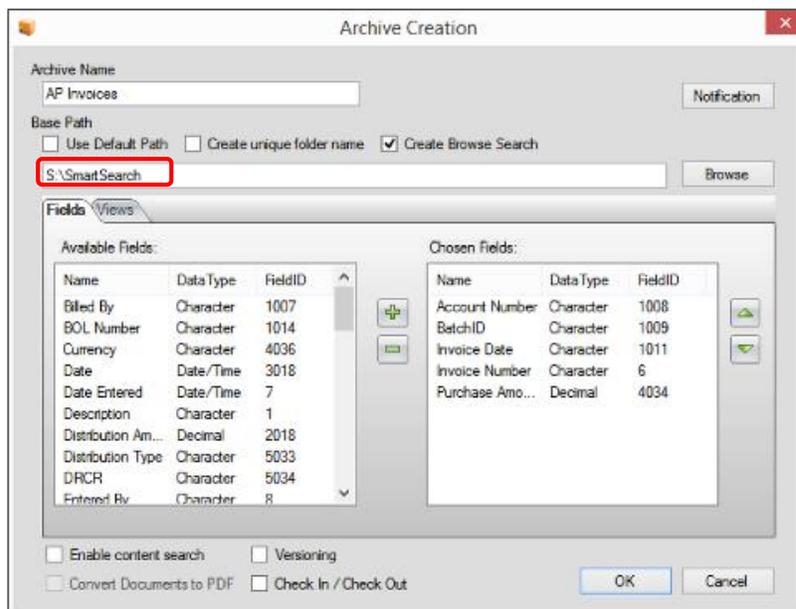
GlobalSync Usage

GlobalSync installs as a local file system on your SmartSearch server. Once installed, Windows Server will recognize a new local disk labeled “Square 9 Global Sync”. The default drive letter is S (Figure 1.1).



(Fig.1.1)

The GlobalSync drive is addressable as any other local storage device would be. As such, setup and configuration of GlobalSync with SmartSearch is as simple as pointing to the drive when a new Archive is created (Figure 1.2).



(Fig. 1.2)

Alternately, SmartSearch can be configured to use the GlobalSync drive as the default path for all new Archives. Existing customers can also easily leverage GlobalSync by adding it to their current system setup.

The end user experience when using traditional local storage or cloud storage with GlobalSync are identical. There is no difference to how users will create and consume content, or the types of documents that may be archived. It is important to realize that storing documents in the cloud can introduce some degree of latency depending on your internet connection speed and bandwidth consumption. GlobalSync also implements a caching mechanism for files to help customers control latency issues.

A user definable document cache is used to store the most recent documents locally on the SmartSearch server. Since cache size is controlled by the administrator, the customer can control how the cache is managed. Little to no cache may be implemented, resulting in 100% document access from the cloud. Alternately, a larger cache may be

configured for minimizing downloads from the server for new and/or recently accessed files. Regardless of how the cache is used, files are always flushed to the cloud as they are added or saved to ensure the cloud is current at all times.

Setup and Configuration

Creating an AWS Account and Configuring S3:

Customers that already have an existing AWS account can leverage what is already in place. Customers new to AWS will need to setup an account. Navigate to aws.amazon.com and create a new account, or login to your existing account. Once logged into the AWS Management Console, select S3 to access the S3 Console (Figure 1.3).



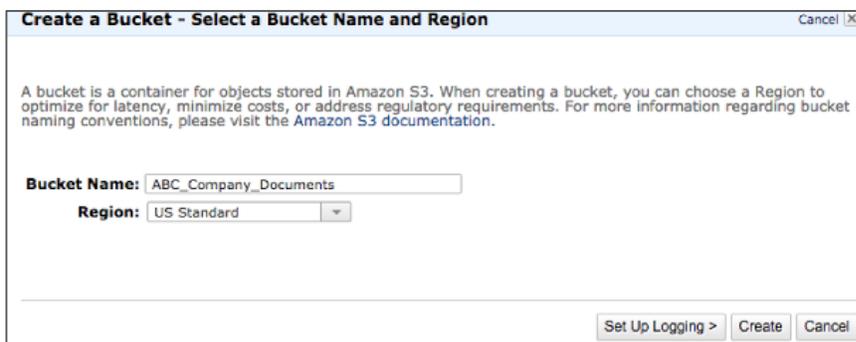
(Fig. 1.3)

S3 repositories are referred to as “Buckets”. Square 9 recommends creating a Bucket specifically for GlobalSync. Click the Create Bucket button to create a new Bucket (Figure 1.4).



(Fig. 1.4)

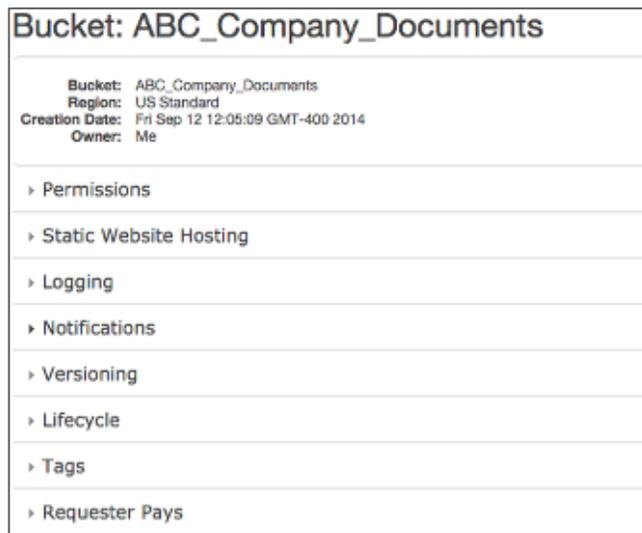
Specify a Bucket Name and Region and click Create. Note that Bucket names may not contain spaces (Figure 1.5).



(Fig. 1.5)

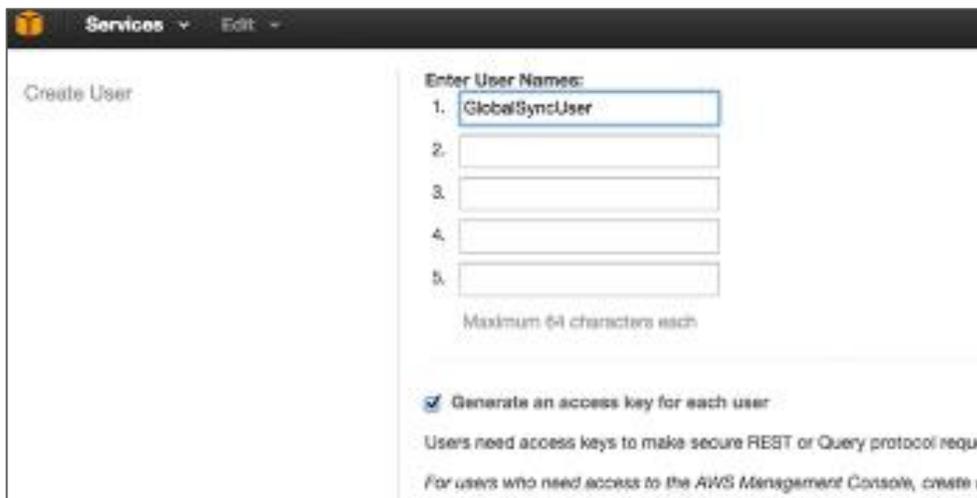
Once the Bucket is created, you will have the ability to configure all of the user definable properties and parameters of the Bucket itself like lifecycles, versioning behaviors and notifications (Figure 1.6).

 *Note: These properties can only be managed from the S3 console.*



(Fig. 1.6)

GlobalSync requires an AWS access key and secret key to securely access the Bucket. To gain the necessary access, create a user in the Identity and Access Management console. To access the IAM, click your account name in the top right corner of the AWS screen and choose Security Credentials. This will bring you to the IAM User’s screen. Click the Create New Users button and enter a username (Figure 1.7).



(Fig. 1.7)

Ensure “Generate an access key” is checked and click Create. Once the user is created, you will be brought to a screen allowing you to access the users’ security credentials.

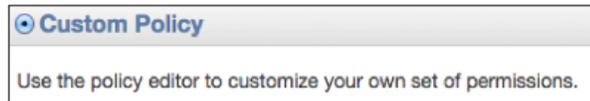
 *Note: You will not be able to access these credentials again. There is no way to recover the credentials if they are lost and the user account will need to be recreated if that happens. **DO NOT LOOSE THE ACCESS KEY ID AND SECRET ACCESS KEY.***

Back on the User list, select the new user so permissions can be applied. Permissions in AWS are applied with Policies. Two policies are required for GlobalSync to function. Click the Attach User Policy button (Figure 1.8).



(Fig. 1.8)

On the set permissions screen, choose Custom Policy and click Select (Figure 1.9).



(Fig. 1.9)

In the Policy Name section, type ListBuckets. In the Policy Document section enter the following policy (Figure 1.10).

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "Stmt1403202294000",
      "Effect": "Allow",
      "Action": [
        "s3:ListAllMyBuckets"
      ],
      "Resource": [
        "arn:aws:s3:*"
      ]
    }
  ]
}
```

(Fig. 1.10)

Attach a second policy named Bucket Access and enter the following Policy Document. Be sure to use your own Bucket name. The Bucket name is listed twice in the Policy Document (Figure 1.11).

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "Stmt1403202783000",
      "Effect": "Allow",
      "Action": [
        "s3:*"
      ],
      "Resource": [
        "arn:aws:s3:::YourBucketName",
        "arn:aws:s3:::YourBucketName/*"
      ]
    }
  ]
}
```

(Fig. 1.11)

Installing GlobalSync

GlobalSync is built on top of .Net 4.5 and requires a 64-bit operating system. Supported operating systems include Windows Server 2008 R2 and Windows Server 2012. The GlobalSync installer will guide you through the setup and configuration. You will need to have your AWS Access Key ID and Secret Access Key available at the time of installation.

Run Setup.exe and click Next (Figure 1.12).



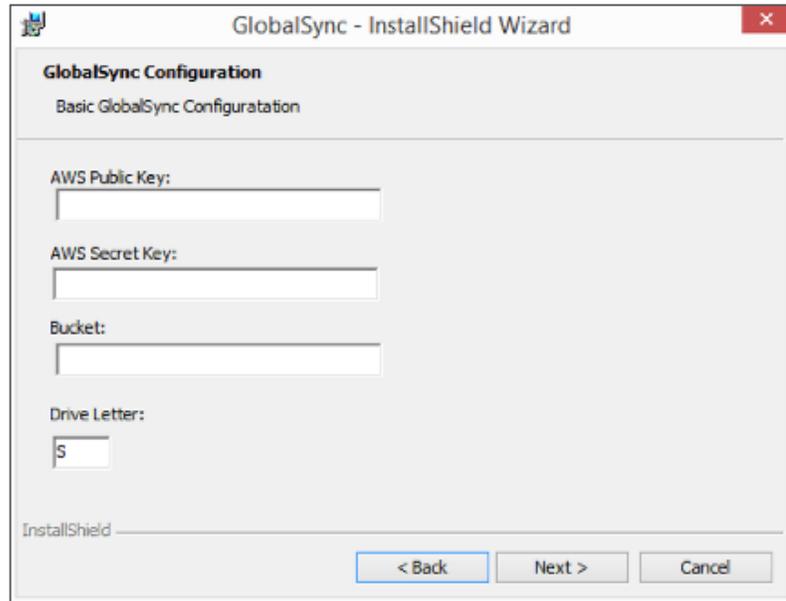
(Fig. 1.12)

Accept the license agreement and click Next (Figure 1.13).



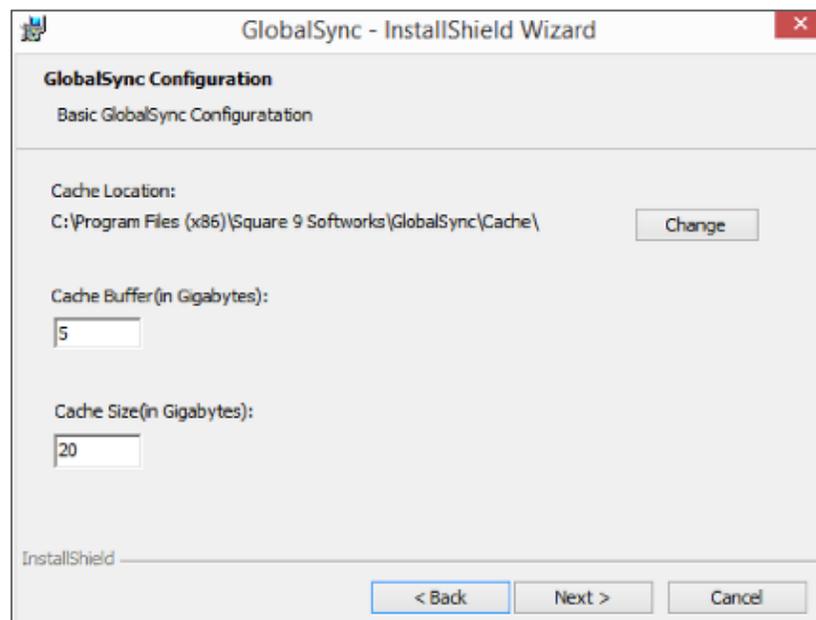
(Fig. 1.13)

Enter the Access Key ID into the AWS Public Key field. Enter the secret access key into the AWS Secret Key field. Enter the bucket name that was configured for GlobalSync. If necessary, change the desired drive letter from S to an available local drive letter on the server (Figure 1.14).



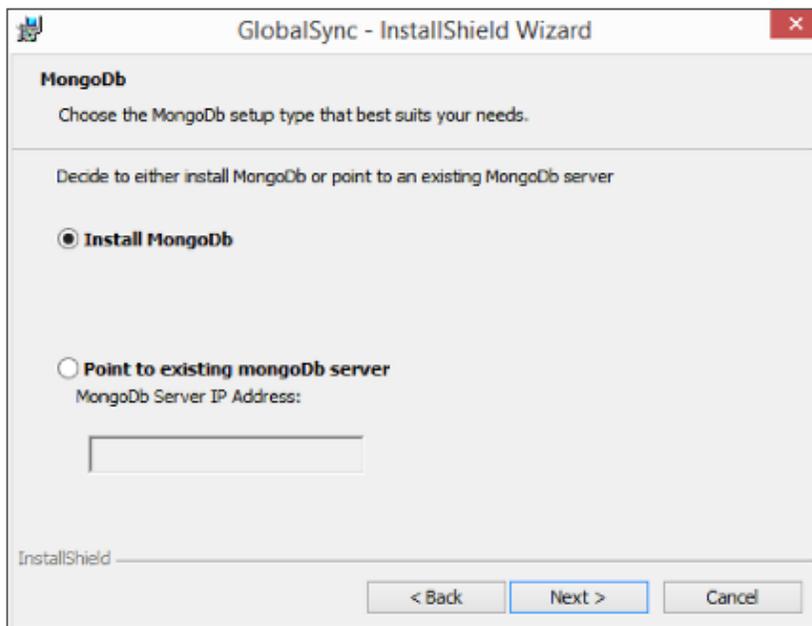
(Fig. 1.13)

Select the cache location. This should be a local drive on the server. Optionally configure the Cache Buffer Size and the Cache Size (Figure 1.14). Cache Size represents the total size of the local cache on the server machine. This is the maximum amount of disk space on the server the cache will consume. The Cache Buffer is the amount of space that is made available when the upper limit of the cache has been reached. For example, if you have a cache of 20GB and a buffer of 5GB, once 20GB of cache has been filled, the system will sweep the oldest files in the cache leaving 15GB of the most recent files still in the cache.



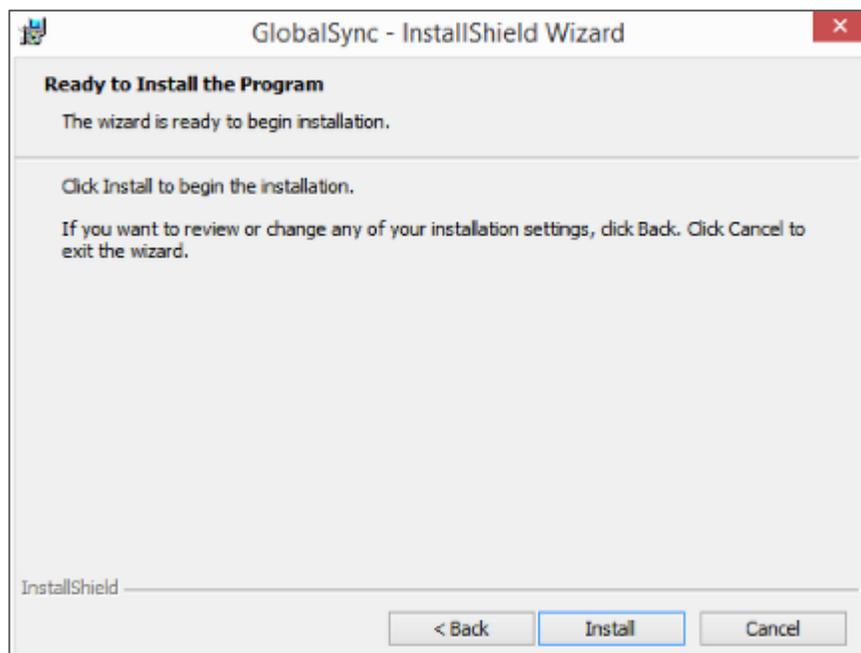
(Fig. 1.14)

GlobalSync uses a database engine called MongoDB for file system maintenance. If the server already has a MongoDB instance installed, you can use the existing instance. Otherwise the installer will create a new Mongo instance for you. Select whether you want to install a new Mongo instance or use an existing instance and click Next (Figure 1.15).



(Fig. 1.15)

Click Install to install and configure GlobalSync (Figure 1.16). A new Windows Service named S9GlobalSync will be installed and started. This service must remain running in order to maintain access to the cloud drive.



(Fig. 1.16)

Notes
