

Workshare Hybrid Storage (WHS) Deployment Checklist

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Planning before deployment

Hardware requirements

- ☐ **Decide on how many servers you want to deploy WHS**
 - Recommended servers:
 - ☐ Server 1: WHS installation and file storage (any other fileserver or NAS can be used) *
 - ☐ Server 2: SQL server (existing SQL server can be used)
 - ☐ **Confirm hardware requirement for WHS server**
 - ☐ 4GB memory (minimum requirement)
 - ☐ 8GB Memory (recommended)
 - ☐ 2GHz or faster x64-bit processor with 2 cores (minimum requirement)
 - ☐ 2GHz or faster x64-bit processor with 4 cores (recommended)
 - ☐ 1GB available disk space for installation (Note: this is not the space where you store your files)
 - ☐ 500GB hard disk space - Consider your storage based on how much data you plan to store - add extra storage if needed. WHS requires a folder or drive to store file content data. There are no restrictions on the type of storage that is used for this purpose as long as it can be presented to WHS as a folder or drive (including network shared drives). (Note: this is the storage where you store your files)
 - ☐ Network and internet connection
- * File content data can be stored in any storage medium that is mounted as a drive or network share on the Windows Server system

Software requirements

- ☐ **Confirm software requirement for WHS server**
 - ☐ Windows Server 2012 R2 only
- ☐ **Confirm software requirement for database server**
 - ☐ SQL Server 2012

Existing SQL Servers can be used.
SQL Server 2014 Express Edition will be installed if you don't have SQL Server 2012, but please consider scalability, redundancy and a backup plan.
- ☐ **Confirm the following two databases are created**
 - ☐ Main database storing file metadata and security information
 - ☐ Error database which is used to record any errors encountered by the application

Other requirements

- ☐ Internal DNS name for the WHS server
- ☐ External DNS name for the WHS server
- ☐ The WHS server must be accessible from both the internal corporate network and the internet over port 443 (HTTPS)
- ☐ A valid SSL certificate (in PFX format) for the WHS server's DNS name when accessed over HTTPS as it will receive requests from both client applications and browsers and from Workshare application servers over HTTPS. Self-signed certificates will not work. Certificates issued by niche Certificate Authorities may not work. Workshare recommends obtaining a certificate from a reputable CA. (GoDaddy)

Installation

- ☐ Ensure you have met all the prerequisite requirements.
- ☐ Select a domain name for the server – for example, hybridstorage.mydomain.com.
- ☐ Obtain an SSL certificate in PFX format for this domain (or a wildcard certificate for *.mydomain.com) Place this on the target machine.
- ☐ Configure DNS records so that hybridstorage.mydomain.com resolves correctly for both internal and external users.
- ☐ Configure any corporate firewall to allow HTTPS requests to reach the server either directly or via a load balancer or reverse proxy.
- ☐ Deployment should begin with a clean but fully up-to-date install of Windows Server 2012, ideally with all service packs and updates installed.
- ☐ Obtain and unpack the Workshare.HybridStorage-<VersionNumber>.zip file on the WHS server.
- ☐ Find the 'SetupServer.ps1' PowerShell script among the unpacked files – this is the installer in a form of an installation script.
- ☐ Find a PowerShell script called 'Configuration.ps1' – this contains all the configuration variables that may need to be changed to customize the installation in the next few steps.
- ☐ Edit the 'Configuration.ps1' file - for more detailed information refer to page 11 of the 'Workshare Hybrid Storage Installation Guide' (available from the Workshare knowledge base).
- ☐ Run the 'SetupServer.ps1' file.

The WHS software is now installed in evaluation mode. It is fully functional and ready to use. We recommend creating a backup before enabling production mode.

Backup

- ☐ Make sure that the SQL databases used by WHS – particularly the main 'storage' database are regularly backed up.
- ☐ Make sure that the file content storage path used by WHS to store file content is regularly backed up.

Enable production mode

- ☐ Evaluation mode servers should be used for testing and evaluation and must not be used for storing 'production' files.
- ☐ To enable production mode make sure you have backup set up for your database and for your file content storage.
- ☐ Follow the 'Enable Production Mode' link in the admin UI and confirm that you have implemented and understood the list of requirements for a production mode server. Please note: The date, user name and list of statements that the user has confirmed are stored in the database.

The following steps are optional depending on whether you have worked with RIAK previously or on earlier versions of WHS.

Migration from RIAK (Linux version)

- ☐ Change TTL on DNS server to 5-15 minutes.
- ☐ Deploy as per 'Installation' steps a hybrid server - WHS server while Riak still in use.
- ☐ Create a new bucket on WHS with same name as Riak bucket.
- ☐ Change the Riak external DNS name so it is unavailable for the users.
- ☐ Copy all existing content from Riak to WHS (via an S3 tool such as Cloudberry Explorer or similar - preferably one that can sync buckets).
- ☐ Update access key and secret key on Workshare Admin console - Data Management to use new WHS keys instead of Riak ones.
- ☐ Make new WHS server available through DNS name previously used by Riak.

Upgrade

- ☐ Make sure you have a backup of the operating system, the databases and your file storage.
- ☐ Obtain and unpack the new version of Workshare.HybridStorage-<VersionNumber>.zip file.
- ☐ If you manually changed the web.config (for instance to change database connection parameters or blob storage folder) then you will need to make matching edits to the InstalledConfiguration.ps file otherwise the upgrade script will overwrite their manual edits to web.config with the original values.
- ☐ Run the upgrade.ps file from the unzipped installation folder ***

Upgrade.ps will load the settings originally used to install the WHS service from a file called

*** 'InstalledConfiguration.ps' that is in the web site folder – default c:\hybridstorage\InstalledConfiguration.ps. The original install writes all the configuration parameters to this file so that they can be re-used by upgrades.

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