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Quick Start Guide

# Ipswitch Analytics Quick Start Guide

Version 2.0



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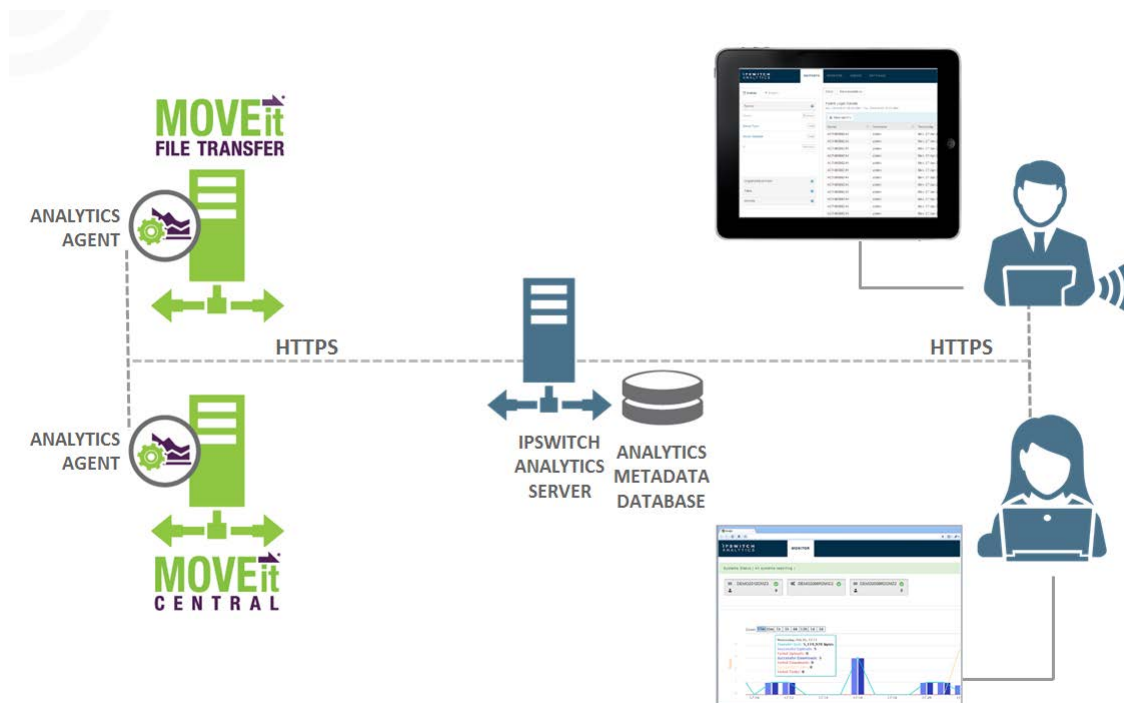
## Available Languages

This Quick Start Guide is available in the following languages:

- **English** [http://www.ipswitch.com/moveitanalyticsQSG2\\_0/en](http://www.ipswitch.com/moveitanalyticsQSG2_0/en)
- **French** [http://www.ipswitch.com/moveitanalyticsQSG2\\_0/fr](http://www.ipswitch.com/moveitanalyticsQSG2_0/fr)
- **German** [http://www.ipswitch.com/moveitanalyticsQSG2\\_0/de](http://www.ipswitch.com/moveitanalyticsQSG2_0/de)
- **Spanish** [http://www.ipswitch.com/moveitanalyticsQSG2\\_0/es](http://www.ipswitch.com/moveitanalyticsQSG2_0/es)

# Introducing Ipswitch Analytics

Ipswitch Analytics is a multi-node system where Agents extract, transform and load (ETL) log and table values from MOVEit File Transfer Server (DMZ) and the MOVEit Central SQL database to the Ipswitch Analytics Server and its database. Because this is a secure system using HTTPS, each node uses identity certificates.



# Requirements

Ipswitch Analytics Server Requirements			
System size (determined by number of Agents. One agent per MOVEit server/SQL database)	Small	Medium	Large
# of Analytics Agents	5 or fewer	6-10	11-20
Minimum RAM 1	4 GB	8 GB	16 GB
Recommended RAM 2	8 GB	16 GB	32 GB
Hard disk drive 3	1 TB	2 TB	4 TB
CPU	4 Core 2.2 GHz		
Network Interface Card	Gigabit Ethernet. The Ipswitch Analytics Server machine must have network access to the Ipswitch Analytics Agent.		
Windows Server OS	64-bit 2012 R2, 2012, 2008 R2 running on an administrator account		
Virtual Machine	VMWare ESX 5, Hyper-V 2008, 2012		

1. The amount of RAM required depends on the number of MOVEit servers and their estimated number of monthly transactions. The Ipswitch Analytics Server installer tunes the Ipswitch Analytics PostgreSQL database automatically based on the RAM detected during installation.
2. Recommended RAM improves user experience and query performance.
3. The amount of hard drive space required depends on the number of MOVEit servers and their estimated number of monthly transactions. Higher numbers of transactions and/or tasks might require a larger hard drive. A transaction includes uploads, downloads, and Central steps. If you are not sure of your MOVEit activity level, see *Estimating Monthly Transactions* (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28863.htm>).  
*Recommended:* 1 or 2 months after you install the Ipswitch Analytics server, check your system to verify that you have enough hard drive space to retain all of your data. *Suggested:* To improve overall data loading and reporting performance, consider using SSD drives instead of spinning drives.

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The Ipswitch Analytics Server must be installed on a dedicated physical or virtual machine. Do not install the Ipswitch Analytics Server on a machine that hosts a MOVEit server or a MOVEit database.

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<b>Ipswitch Analytics Agent Requirements</b>	
1 GB of free disk space	
512 MB of free RAM	
Network connectivity with the MOVEit database and the Ipswitch Analytics Server. The Agent machine does not need network connectivity with the MOVEit server.	
One or more working MOVEit systems, each with a current license: <ul style="list-style-type: none"><li>▪ MOVEit File Transfer Server (DMZ) 8.0, 8.1, 8.2, 8.3.</li><li>▪ MOVEit File Transfer (DMZ) High Availability and Disaster Recovery 8.0, 8.1, 8.2, 8.3.</li><li>▪ MOVEit Central 8.0, 8.1, 9.0.</li><li>▪ MOVEit Central Failover 8.0, 8.1, 9.0.</li></ul>	
Supported MOVEit databases: <ul style="list-style-type: none"><li>▪ Microsoft SQL Server 2014 Standard/Enterprise (local or remote)</li><li>▪ Microsoft SQL Server 2012 Standard/Enterprise (local or remote)</li><li>▪ Microsoft SQL Server 2008 R2 Standard/Enterprise (local or remote)</li><li>▪ Microsoft SQL Server 2008 Standard/Enterprise (local or remote)</li><li>▪ MySQL 5.1.x - 5.5 (local only)</li></ul> <p>You can install only one Agent per machine (physical or virtual machine) and one Agent per SQL instance. <i>Recommended:</i> Install the Agent on the same machine that hosts the MOVEit database.</p>	
(optional) Virtual machines running on: <ul style="list-style-type: none"><li>▪ VMware ESX (32-bit and 64-bit guest servers)</li><li>▪ Microsoft Hyper-V (32-bit and 64-bit guest servers)</li><li>▪ Hardware and software requirements for the virtual machine are the same.</li></ul>	
<b>Supported Web Browsers</b>	
<ul style="list-style-type: none"><li>▪ Chrome 47.0.x and 48.0.x (Windows only)</li><li>▪ Microsoft Internet Explorer 10 and 11 (Windows only)</li><li>▪ Microsoft Edge 23.x and 25.x (Windows 10 only)</li><li>▪ Mozilla Firefox 43.x and 44.x (Windows, Mac, and RedHat Linux)</li><li>▪ Safari 8.x and 9.x (Mac only)</li></ul>	
<b>Additional Requirements</b>	
Adobe Reader is required to read exported PDF reports.	

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# Install Ipswitch Analytics for the First Time

Read this section if you *do not have* an earlier version of Ipswitch Analytics installed.

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If you already have an older version of Ipswitch Analytics, see *Update to a New Release of Ipswitch Analytics* (on page 20).

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Here is a high-level view of the installation process. Click any item to view instructions for that step.

## Step 1: Gather Items

- Admin credentials to sign in to your network
- MOVEit IP addresses or hostnames
- MOVEit database administrator credentials
- Certificate Keystore file (optional)
- Ipswitch Analytics license file

## ***Step 2: Install the Analytics Server*** (on page 8)

- Download the Analytics Server install file
- Install the Analytics Server

## ***Step 3: Sign in, Upload the License File*** (on page 10)

- In a web browser, navigate to Analytics Server URL
- Sign in
- Upload license file to SETTINGS > Licensing

## ***Step 4: Install Analytics Agents*** (on page 11)

- Download the Analytics Agent install file
- Install one or more Analytics Agents

## ***Step 5: Verify Agent Functionality*** (on page 14)

- Go to the Monitor
- Verify that all Agents are online

## ***Step 6: Configure Analytics Server*** (on page 15)

- Set global password policy
- Create user accounts
- Set up email notifications
- Create rulesets
- Create user groups

**INSTALLATION COMPLETE.** Give sign in credentials and Ipswitch Analytics Server URL to users.

# Step 1: Gather Items

Print this installation worksheet. Before you start the installation, gather the items in the Pre-installation Checklist. As you install the product, add your input values to the list.

## Installation Worksheet

### Pre-installation Checklist

- ☐ Windows Server \_\_\_\_\_
- ☐ Windows Server \_\_\_\_\_
- For each MOVEit database:
  - ☐ Database Type \_\_\_\_\_
  - ☐ Database Name: \_\_\_\_\_
  - ☐ IP address or hostname: \_\_\_\_\_
  - ☐ Username: \_\_\_\_\_
  - ☐ Password: \_\_\_\_\_
- ☐ Certificate keystore file. If you do not have a certificate keystore file, you may opt to create a 90-day self-signed certificate and import a certificate keystore file later.
- ☐ Ipswitch Analytics license file (evaluation or perpetual)

### Installation Input Values

Analytics Server Settings System Administrator username: \_\_\_\_\_

Analytics Server Settings: System Administrator password: \_\_\_\_\_

Analytics Server Settings: System Administrator email: \_\_\_\_\_

Agent Access username: \_\_\_\_\_

Agent Access password: \_\_\_\_\_

Tomcat Settings: HTTPS Connector Port (8443 default): \_\_\_\_\_

Tomcat Settings: Ipswitch Analytics Server URL: \_\_\_\_\_

Tomcat Service Logon Username: \_\_\_\_\_

Tomcat Service Logon Password: \_\_\_\_\_

Tomcat Service Logon Group (optional): \_\_\_\_\_

Tomcat certificate keystore password or self-signed certificate password: \_\_\_\_\_

Ipswitch Analytics Database Admin Username: \_\_\_\_\_

Ipswitch Analytics Database Admin Password: \_\_\_\_\_

Ipswitch Analytics Database Access Username: \_\_\_\_\_

Ipswitch Analytics Database Access Password: \_\_\_\_\_

Ipswitch Analytics Database Port: \_\_\_\_\_

Analytics Agent Truststore Password: \_\_\_\_\_



## Step 2: Install the Analytics Server

- 1 Sign in as an **Administrator** on a Windows Server machine. This will be the account under which all Ipswitch Analytics Server processing occurs.
- 2 Download the Ipswitch Analytics Server installation file: **lpswitch\_Analytics\_Base\_vn.exe**, where *n* is the version number of the software.
- 3 Open **lpswitch\_Analytics\_Base\_vn.exe**.

**Note:** If the machine is missing any prerequisites, a list of software items appears. Click **Install**.

The Start Install page of the installer opens. Click **Next**.

- 4 Accept the License Agreement. Click **Next**.
- 5 Select a **Destination Folder** for the Ipswitch Analytics Server files.

**Caution:** Do not specify a destination on a drive that is mapped to a network drive.

**Caution:** Do not specify a destination on the desktop.

**Note:** You select the location for the Ipswitch Analytics Server database files in a later step.

Click **Next**.

- 6 Enter the **Analytics Server Settings**. Click **Next**.
- 7 Enter the **Agent Access Settings**.

The Agent Access Username and Password are used by all Ipswitch Analytics Agents to authenticate with the Ipswitch Analytics Server, and validate data sent from the agent to the server. This account is not used by any person. In the Analytics user interface Users module, this username appears in the list of users.

Provide the following information:

- **Agent Access Username:** Default name is **feeder**. Allowed characters: alpha characters a through z, numerals 0 through 9, and underscore (\_).
- **Agent Access Password:** The password for the Agent to use when authenticating with the Ipswitch Analytics Server.

**IMPORTANT:** Write down the Agent Access username and password on the Installation Worksheet. You must provide them when you install an Agent.

- 8 Enter the **Tomcat Settings**.
  - **HTTPS Connector Port:** The connector port used for HTTPS and the Ipswitch Analytics Server URL. Adhere to your IT security or other IT network policies when configuring ports.
  - **Ipswitch Analytics Server IP address or hostname:** Must match the Common Name (CN) in your imported keystore certificate.

**IMPORTANT:** Write down this information in the Installation Worksheet.

Click **Next**. The HTTPS Connector Port will be validated.

## 9 Specify the Tomcat Logon Account.

Make a selection based on the account you want to use to sign in and run the Ipswitch Analytics Server service:

- **Use Local System Account (default):** Uses the Local System account to sign in and run the service. This is the account that you used to sign in to Windows. (If you select this option, you are not required to provide additional credentials.)
- **Specify a different account:** Does not use the Local System account. If you select this option, an additional screen opens for you to provide the user name, password, and group of the account to sign in and run the Ipswitch Analytics service. To use a domain account, provide credentials in the format DOMAIN\username.

Click Next.

## 10 Select a Tomcat SSL Certificate option.

The Ipswitch Analytics Server uses this information to validate identity certificates.

- **Create Self-Signed Certificate**  
Select this option for Evaluation Accounts only; it creates a certificate that expires in 90 days. Provide a password. Click Next.
- **Import Certificate Keystore:** Import an SSL password-protected PKCS12 certificate keystore file with .PFX or .P12 file extension. Click **Browse** to locate and select the certificate keystore, and then provide the password for the keystore. Click Next.

## 11 Select a Database Location for the Ipswitch Analytics Server's PostgreSQL database. MOVEit data collected from all Agents is sent to this database. *Recommended:* Use the default location.

**IMPORTANT:** If you select a different database location, it must be a data-specific directory that is not limited to a single user.

Click Next.

## 12 Enter the Ipswitch Analytics Database Settings. This information is required to run the PostgreSQL database on the Ipswitch Analytics Server. A PostgreSQL database will be installed on this machine as part of the Ipswitch Analytics Server installation.

- **Database Administrator Username:** Username for the account that the database administrator can use to access the PostgreSQL database if necessary. *Recommended:* use the suggested username.
- **Database Administrator Password:** Password for the Admin Username you specified.
- **Database Access Username:** The account that the Ipswitch Analytics Server web application uses to access the PostgreSQL database, to insert data that arrives from the Ipswitch Analytics Agents, and to retrieve report and monitor data for display. This account is not used by any person. *Recommended:* use the suggested username.
- **Database Access Password:** Password for the Access username you specified.
- **Database Port:** This port number is predefined to the standard PostgreSQL port. You can specify any unused port.

Click Next.

## 13 Review the installation setup, and then click Install.

**14** On the Installshield Wizard Completed screen, click **Finish**.

The installation program places an Ipswitch Analytics shortcut icon on your desktop and the Start menu.

**Tip:** The log files are located in <installation\_directory>\Logs. For example,  
C:\Program Files\Ipswitch\Analytics Server\Logs

## Step 3: Sign in and Upload the License File

After you click **Finish** on the Installation Complete screen, an Ipswitch Analytics shortcut icon is placed on your desktop and Start menu.

**Note:** If users will access the Analytics Server from outside the corporate firewall, go to an external computer not connected to your network, open a web browser, and enter the Analytics Server URL in the address bar. If you cannot connect to the Analytics Server from the external computer, you might need to configure your firewall to open the port.

- 1 Click the Ipswitch Analytics shortcut. A browser window opens to the sign-in page. Sign in using the **System Administrator** user name and password that you created during the Ipswitch Analytics Server installation. The Ipswitch Analytics workspace opens with a Welcome message.

**Note:** If you cannot sign in, see ***Troubleshooting (Installation)*** (on page 18).

- 2 Click **Browse to License** and select your license file.

The Licensing page shows:

- **# Licenses:** The number of Agent licenses allowed by your license. The base Ipswitch Analytics license includes two Agent licenses that can be connected to either MOVEit server type; additional licenses are specific to the MOVEit server type.
- **# Available:** The number of unused Agent licenses. Initially this number is the same as the number of licenses. When you install an Agent, the Agent uses one of the available licenses, and the # Available is reduced.
- The **Base Serial Number** populates with a long alpha-numeric number.

The **Licenses** section lists all available Agent licenses.

For more information about:

- Disconnecting and reconnecting Agents to a MOVEit database, see **Licensing** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28525.htm>).
- Purchasing add-on Agent licenses, see **How to Buy** (<http://www.ipswitchft.com/how-to-buy>).

## Step 4: Install an Analytics Agent

Note: For MOVEit Central Environments:

See *Installing Analytics Agents in Legacy Failover Environments*

<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#29421.htm>.

Install an Agent for each MOVEit database that you want to include in the Ipswitch Analytics environment. Install only one Agent per machine.

*Recommended:* Install the Agent on the machine that hosts the MOVEit database. For more information, see *Configuration Options*

<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#29291.htm>.

The machine that hosts the MOVEit database must be online and network accessible.

- 1 On the machine where you want to install the Agent, sign in with an account that has administrator privileges.

*Recommended:* Install the Agent on the machine that hosts the MOVEit database.

- 2 Download the appropriate Ipswitch Analytics Agent installation file, where *n* is the release number:

- 64-bit: `ipswitch_Analytics_Agent64_vn.exe`
- 32-bit: `ipswitch_Analytics_Agent32_vn.exe`

- 3 Open the Ipswitch Analytics Agent installation file. Click **Next**.

- 4 Accept the License Agreement. Click **Next**.

- 5 Select a Destination Folder.

**Caution:** Do not specify a destination on the desktop.

Click **Next**.

- 6 Enter the **Analytics Server Settings**. The Agent forwards data from the MOVEit server to the Ipswitch Analytics Server that you specify here.

- **Ipswitch Analytics Server IP address or hostname:** (From the **Tomcat Settings**) For example, if you entered `https://analytics:8443/ura` for Ipswitch Analytics Server URL during installation of the Ipswitch Analytics Server, enter `analytics`.
- **Port:** The port on which the Ipswitch Analytics Server accepts HTTPS connections. Default is 8443. Adhere to your IT security or other IT network policies when configuring ports.
- **Agent Access Username:** The username that the Agent uses to authenticate with the Ipswitch Analytics server. You specified this username during the Ipswitch Analytics server installation. See the Installation Worksheet.
- **Agent Access Password:** See the Installation Worksheet.

- 7 Click **Next**.

- 8 If the machine on which you are installing the Agent does not contain an installation of MOVEit Central or DMZ, select the **MOVEit server type** for which you are installing this Agent.

**9 Enter the MOVEit Database Settings.**

- **Database Type:** Select either **MySQL** or **Microsoft SQL Server**, depending on the type of database used by the MOVEit server you selected in the prior step.
- **Authentication Type (SQL Server only):** Select the authentication type that is used for logon to the SQL Server.

**Windows:** SQL Server logon will use Windows authentication. If you select this option, username must be entered in the **DOMAIN\User** format.

**SQL:** SQL Server logon uses a separate user/password created specifically for logon to the SQL Server database.

- **Database Name:** The name of the MOVEit database. If you are installing the Agent on the same machine as the MOVEit server, this field is pre-populated.
- **Hostname or IP Address:** The location of the MOVEit database. The value you specify depends on your configuration:
  - If the MOVEit database is on the same machine as the MOVEit server, value is **localhost**.
  - If the MOVEit database and MOVEit server are on separate machines, the value is the Hostname or IP address of the machine where the database is located.

**Note:** If you are installing the Agent on a machine that contains an SQL Server database with multiple instances on the same server, the Hostname or IP Address field prepopulates with the default value used by MOVEit Central or DMZ (for example, localhost\instance1). You can enter a different instance. If the machine does not contain MOVEit DMZ or Central, you must enter the instance name manually.

- If you are installing the Agent on a machine that does not have MOVEit DMZ or Central, the default database name appears here (for example, moveitdmz).
- **Port:** The port that is used to connect with the MOVEit database. Default is the default port value for MSSQL/MySQL.

**Note:** If the MOVEit database is using a non-standard port number, you must remove the default port number and replace it with the non-standard port number.

- **Username and Password:** The username and password that allows access to the MOVEit database. For an SQL Server database: The Authentication Type you selected in a previous step determines what user credentials you enter here. Windows authentication requires that the username be in the **DOMAIN\User** format.

**Tip:** If you cannot locate the username and password to the MOVEit database, look in C:\MOVEitDMZ\_Install.INI file (DMZ) or C:\MOVEitCentral\_Install.INI file (Central).

**10 Click Next.****11 Enter the Analytics Agent Settings.**

- **Agent Display Name:** Enter a name to identify this MOVEit server within Ipswitch Analytics. The name will appear in the Monitor dashboard and in reports.

**Tip:** Use the MOVEit Central name in the Agent Display Name so that in the Ipswitch Analytics interface, users can identify data that comes from this MOVEit server.

- **Is this a new or existing agent?** Select an option:
  - **Installing a new agent with a new name:** The Agent Display Name must be unique.
  - **Installing an agent already known to Analytics Server:** Use this option if an agent with this display name was previously installed on this MOVEit Central or MOVEit DMZ server, and was later removed. If you install a new agent on the same server, you can use the same name as the "old" agent.
- **Would you like to include historical data?** This will import all current data from this MOVEit server:
  - **Yes:** Ipswitch Analytics includes all historical data from this MOVEit server.
  - **No:** Ipswitch Analytics reports include data *from this time forward only*, and does include any past data from this MOVEit server.

See the subsection **About historical data**, below.

Click Next.

## 12 Review the installation setup, and then click Install.

**Note:** If you click Cancel, the installation stops, but the Agent installation folder remains in the installation directory you selected. You can safely delete the Analytics Agent directory to remove any files that remain after an interruption of the installation process.

To view the installer log after the installation finishes, select the checkbox.

To view the log at another time: the log is located in a temp directory in the user's AppData folder. For example, C:\Users\Administrator\AppData\Local\Temp\n\MSIstring.log (where *n* is a number, and *string* is an alphanumeric string).

## 13 Click Finish.

The Ipswitch Analytics Agent service is now running on this machine and immediately starts to report data to the Ipswitch Analytics Server. To disconnect this Agent, see **Licensing** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28525.htm>) in the *Ipswitch Analytics Administrator's Guide*.

To install another licensed Agent for a different MOVEit database, repeat this procedure (Step 4: Install an Analytics Agent).




## About historical data

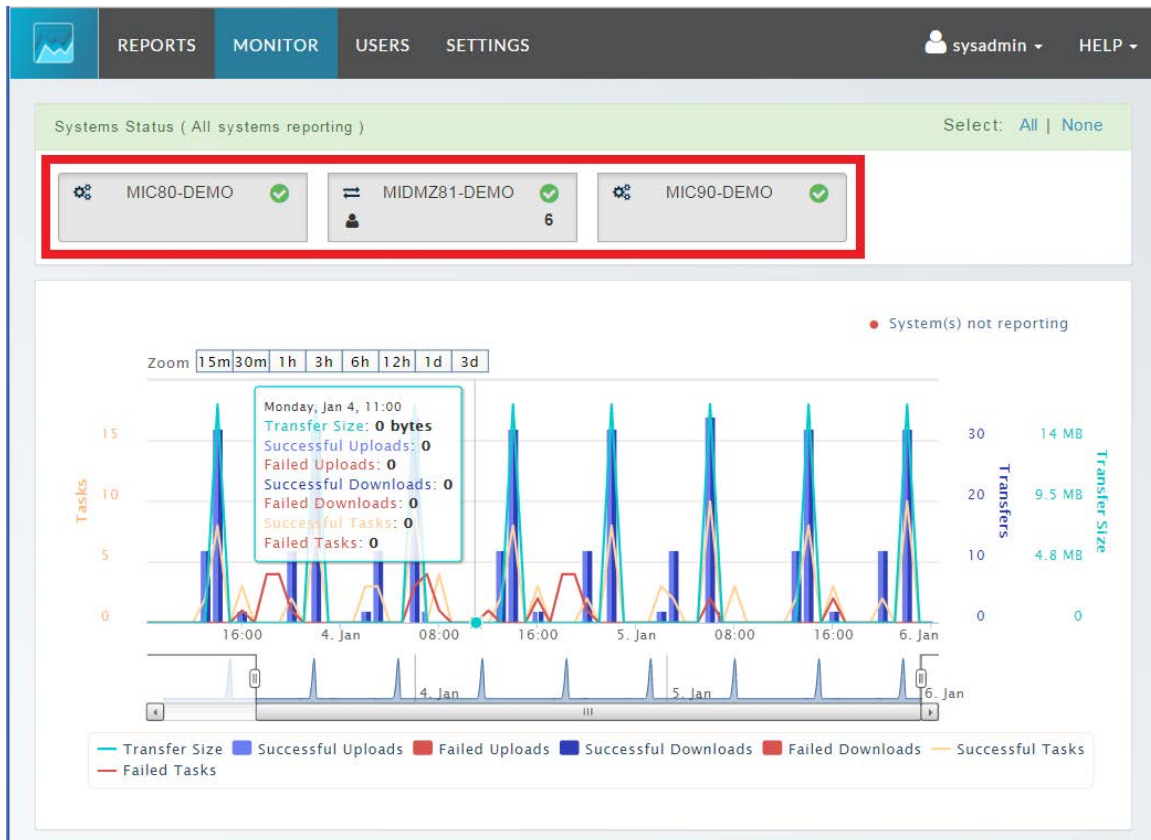
If during the Agent installation, you chose to include historical data, it might take some time (a few minutes to a few hours) to retrieve the historical data and send it to the Ipswitch Analytics server. While the data is being captured, the MOVE it server continues to operate, and you can use Ipswitch Analytics. However, because data capture is a "trickle" process, some historical data cannot be viewed until the data capture process is complete. You are not notified when the Agent finishes including all historical data. To verify that the historical data capture process is complete, run a report for a time range in the past.

If you have a large number (more than 10) Analytics Agents to be connected to the Analytics Server, the server might face heavy data volume from the agents if they all feed historical data at the same time. To

make the initial data loading process run more smoothly, start the agents by smaller groups of 10 agents. Start the second group after the first group has finished loading historical data. After the historical data is loaded, the data volume returns to normal levels and all agents can stay up. Users can then start to use the Analytics Server.

## Step 5: Verify Agent Functionality

- 1 In the web browser where you signed in earlier, navigate to the **Monitor** module.  
The top of the workspace contains a Dashboard that shows all of the Agents that you installed.
- 2 Verify that all Agents are Online  and sending data to the Ipswitch Analytics Server. If the status of any Agent is Unknown  or Offline , see **Troubleshooting** (on page 18).  
For example, the figure shows three installed agents that are online and sending data to the Ipswitch Analytics Server.



To release an Agent license so that you can use it with a different MOVEit server, see **Licensing** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28525.htm>).

## Step 6: Configure the Analytics Server

Complete each of the following tasks to configure the Analytics Server for the first time.

- *Add User Accounts* (on page 15)
- *Set Up Email Notification* (on page 16)
- *Create Rulesets* (on page 17)
- *Create User Groups* (on page 17)

### Add User Accounts

- 1 Open the Users module.
- 2 Click Add User. The New user screen appears.
- 3 Enter a unique alphanumeric Username.
- 4 Use the drop-down list next to the username to select a **Role** for the user.

The user's Role controls access to Ipswitch Analytics modules and Ipswitch Analytics report types, and allows the following actions:

- **Partner:** View Transfer and Workflow reports in the Library.
- **Monitor:** View the Monitor.
- **Reader:** View the Monitor; view Transfer and Workflow reports in the Library.
- **Creator:** View the Monitor; view Transfer and Workflow reports in the Library; create reports in the Templates and Schedule tabs. This role is for users whose main purpose is to create reports.  
**Note:** A ruleset can limit the MOVEit sources that a Creator can access when creating and running templates, and when creating schedules.
- **Administrator:** Access all Ipswitch Analytics modules except the SETTINGS > System tab; view all report types, including User Audit and Security reports; create rulesets, assign rulesets to schedules.
- **System Administrator:** Full access: manage all system settings and access all areas of Ipswitch Analytics.

**Caution:** Assign users to the System Administrator role with caution. Only System Administrators can manage system-wide settings in the Settings module, and can access all areas of Ipswitch Analytics.



The table shows each role, its permissions, and the accessible Ipswitch Analytics modules.

Role	Reports			Monitor	Users	Settings		
	Library	Templates	Schedule			Rulesets	System	Licensing
Partner	Transfer and Workflow only	NO	NO	NO	NO	NO	NO	NO
Monitor	NO	NO	NO	YES	NO	NO	NO	NO
Reader	Transfer and Workflow only	NO	NO	YES	NO	NO	NO	NO
Creator	Transfer and Workflow only			YES	Read only	NO	NO	NO
Administrator	YES	YES	YES	YES	YES	YES	NO	NO
System Administrator	YES	YES	YES	YES	YES	YES	YES	YES

Follow your organization's accepted security practices when assigning roles.

- 5 A suggested Password appears.
  - To have the system suggest a different password, click **Generate**.
  - To create a custom password, click **Change**.
- 6 *Optional*: Enter a **Firstname** and **Lastname** for the user.
- 7 Enter an **Email address**, where email notifications will be sent when scheduled reports are ready for viewing. The email address does not have to be unique; multiple users can share the same email address.
- 8 Click **Save**.
- 9 Give the following information to users so they can sign in to Ipswitch Analytics: **Ipswitch Analytics** Server IP address or hostname, Username, Password.

## Set Up Email Notifications

If you plan to allow scheduled report delivery to email addresses, you must set up email notifications.

- 1 Go to the **SETTINGS** module and select the **System** tab.
- 2 Select the **Enable Email Notifications** checkbox.
- 3 Enter the following information:
  - **Host Name**: Host name or IP address of the SMTP server. This is the server that will deliver the outgoing email messages. For example: smtpstest.ipswitch.com or 192.168.1.1.
  - **Port**:
  - **Enable Authentication**: This checkbox must be selected to allow email notifications.
  - **Username and Password**: The login credentials for the SMTP server.
  - **Enable STARTTLS**: If selected, and a socket factory has not been specified, the use of a MailSSLSocketFactory is enabled.
 Provide the following information:

- **Hosts to trust for SSL connection:** The host name or IP address. Wildcards are accepted ("\*" will trust all hosts). Enter multiple hosts separated by spaces.
- **Socket connection timeout in milliseconds:** Default is 10,000.
- **Socket I/O timeout in milliseconds:** Default is 30,000.
- **Enable HTML email (optional):** Sends email notifications in HTML format. If not selected, email is sent in plain text.
- **From email address:** An email address from which notifications will be sent.

**Note:** Supported email clients: Gmail, Microsoft Outlook, Apple Mail.

#### 4 Click Save.

To return to the original default Notification settings, click **Reset**.

View **sample emails**

(<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28933.htm>).

## Create Rulesets

Rulesets restrict access to specific MOVEit sources. Rulesets:

- Block Creators from viewing and selecting specific MOVEit servers, organizations and usernames in the Templates Filter.
- Limit a scheduled report to include only specific MOVEit servers, organizations and usernames.

Create rulesets in the **SETTINGS** module. For more information, see **Rulesets**

(<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28529.htm>).

## Create User Groups

User Groups:

- Allow only a specific group of users to view and/or manage a Library report
- Deliver a scheduled report to a specific group of users

Create user groups in the **USERS** module, under the **Groups** tab. For more information, see **User Groups**

(<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28742.htm>).

## Modify or Remove

To Modify or Remove the Analytics Server or an Analytics Agent, see *Modify* (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28636.htm>) or *Remove* (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28360.htm>).

**WARNING:** Removing the Analytics Server also removes the Analytics database.

To open the *Ipswitch Analytics Administrator Guide*, select HELP > *Administrator Guide* ([http://www.ipswitch.com/analytics02\\_0adminhelp/en](http://www.ipswitch.com/analytics02_0adminhelp/en)).

## Troubleshooting (Installation)

Problems and possible causes:

### Cannot access the Ipswitch Analytics server

- During the Server installation, when selecting a Tomcat certificate option, you imported a Certificate Keystore but the keystore failed. To fix the certificate keystore, update the certificate by *Modifying the Server Installation* <https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28706.htm>.

### Ipswitch Analytics Server sign-in page does not appear

- The Ipswitch Analytics Server machine is shut down or is restarting.
- The Ipswitch Analytics Server service is not running. Check this in your computer's Control Panel > Administrative Tools > Services.
- Verify internet connectivity on both machines.
- During the Ipswitch Analytics Server installation, the PKCS12 keystore certificate was entered in an unsupported format. The installer does not validate imported certificates.  
*To fix this:* Modify the server installation and select a keystore certificate that has a .PFX or .P12 extension.

### In the Monitor module, Agent status is Unknown or Offline

- The MOVEit database machine is shut down or is restarting.
- The MOVEit database service has stopped running.  
*To check this:* On the MOVEit database machine, go to the Control Panel > Administrative Tools > Services. Depending on the MOVEit database, make sure either the Microsoft SQL Server or the MySQL service is running.

- The Agent machine is shut down or is restarting.
- The Ipswitch Analytics Agent service has stopped running on the Agent machine.  
*To check this:* On the Agent machine, go to the Control Panel > Administrative Tools > Services. Verify that the Ipswitch Analytics Agent service is running.
- There is no Internet connectivity on the Agent machine or the MOVEit database machine.
- Firewall restrictions prevent the Agent machine from having network access to the MOVEit database machine or the Ipswitch Analytics Server machine.
- The password that the Agent uses to access the MOVEit database has expired or was changed.  
To update the Agent username or password, you must ***modify the Agent installation*** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28697.htm>).
- The HTTPS port on the Agent machine, the MOVEit database machine and/or the Ipswitch Analytics Server machine is not open.  
To update the port numbers for any of these machines, you must ***modify the Agent installation*** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28697.htm>).

## In the Monitor module, the Agent does not appear on the dashboard

- ***Modify the Agent installation*** (<https://docs.ipswitch.com/MOVEit/Analytics2.0/Help/Admin/en/index.htm#28697.htm>): on the Analytics Server Settings screen, make sure that you enter the correct password for the Agent to access the Ipswitch Analytics server.
- Check the Agent log on the Agent machine, located at C:\Program Files\Ipswitch\Analytics Agent\logs\agent.log to see if the Agent is able to receive data from the MOVEit database, authenticate with the Ipswitch Analytics Server and send data to the Ipswitch Analytics Server.

# Update to a New Release of Ipswitch Analytics

Update the Analytics server first, and then update the Agents.

## Before You Update

- 1 Back up your existing database. For instructions, see the *POSTgreSQL documentation* (<http://www.postgresql.org/docs/9.3/static/backup.htm>).

**Note:** Ipswitch strongly recommends that you back up your database before you run the installer.

- 2 Back up the following files:
  - cert files. These files are named `server*.pem` and are located under the install directory in `apache/tomcat7/certs/`
  - .init file This file is located under the install directory in `...apache/tomcat7/conf/.init`

**Note:** Make sure that you do not have any files open in the existing installation directories for the Ipswitch Analytics Server or the Ipswitch Analytics Agents.

## New License is Required

A new Ipswitch Analytics license is required to complete the upgrade process. Licenses for your existing version of Ipswitch Analytics do not work with the upgraded version. To obtain a new license, visit the *Ipswitch File Transfer Customer Portal* <https://ipswitchft.secure.force.com/cp/CPMyLicenses>.

## What Happens During the Server Update?

When you run the installation program, it detects that a previous version of the Ipswitch Analytics server is installed. The installation program saves your server settings, retains the database, and uninstalls the existing server software. Next, it installs the new version of server software, moves back the database, and restores your server settings. You then sign in to the Admin Console and upload your license file.

First, *Update the Analytics Server* (on page 21)

Next, *Update the Analytics Agents* (on page 22)

## Update the Analytics Server

- 1** Sign in as Administrator on the Windows machine where the Ipswitch Analytics server is currently installed.
- 2** Download the Ipswitch Analytics Server installation file: `ipswitch_Analytics_Base_vn.exe`, where *n* is the version number of the software. Open the file.  
The Preparing Setup screen opens, with a progress bar. The installer detects the presence of a previous version of Ipswitch Analytics Server software.  
The Welcome screen opens.
- 3** Click **Next**.  
The Setup Status screen opens, showing a progress bar. The upgrade process can take several minutes, depending on the size of your database.  

**Note:** When you originally installed the previous version of Ipswitch Analytics, you provided Tomcat Logon Account information. The default was to use the local system account. If during that installation *you specified a different account*, the upgrade program prompts you for the username, password, and group of that account.
- 4** When the Update Complete screen opens, click **Finish**. The Ipswitch Analytics sign-in page opens.
- 5** Enter your username and password, and click **Sign in**. Ipswitch Analytics opens to the Licensing page with an Upgrade Complete message.
- 6** Click **Browse to License** and select your new license file. The license file is uploaded.

Next: *Update the Analytics Agents* (on page 22).

## Update the Analytics Agent

Upgrade the Agent on each MOVEit database machine in your Ipswitch Analytics environment.

- 1 On the machine where you want to upgrade the Agent, sign in with an account that has administrator privileges.
- 2 Download the appropriate Ipswitch Analytics Agent installation file, where *n* is the release number:
  - 64-bit: `ipswitch_Analytics_Agent64_vn.exe`
  - 32-bit: `ipswitch_Analytics_Agent32_vn.exe`

- 3 Open the Ipswitch Analytics Agent installation file.

The Preparing to Install screen opens, showing a progress bar. The installation program detects the existing agent. A Question dialog box opens with the message "This setup will perform an upgrade of 'Ipswitch Analytics Agent'. Do you want to continue?"

- 4 Click Yes. The Welcome screen appears briefly, and the installation program begins. The process can take several minutes.

In some situations, the following Installer Information message appears:

The setup must update files or services that cannot be updated while the system is running. If you choose to continue, a reboot might be required to complete the setup.

- 5 If you receive the information message, click OK.

The program continues until the InstallShield Wizard Completed screen appears.

Tip: To open the log after installation finishes, select the checkbox.