Autonomy Connected® Backup Installing Mac Agents

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Notice to Government End Users

Acknowledgements

RSA Data Security, Inc. MD5 Message-Digest Algorithm; zlib general purpose compression library, Jean-loup Gailly and Mark Adler; Info-ZIP, more information at `ftp://ftp.info-zip.org/pub/infozip/license.html`; HTML-to-RTF Pro DLL 1.8 © 2002-2007 SautinSoft.

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About This Document

This document is for system administrators and Data Center technicians. To use this document, you must be familiar with your Connected® Backup Data Centers and the Mac OS® X operating system.

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Documentation Updates

The information in this document is current as of Autonomy Connected® Backup version 8.6.2. The content was last modified 30 May 2012.

You can retrieve the most current product documentation from Autonomy's Knowledge Base on the Customer Support Site.

A document in the Knowledge Base displays a *version number* in its name, such as *IDOL Server 7.5 Administration Guide*. The version number applies to the product that the document describes. The document may also have a *revision number* in its name, such as *IDOL Server 7.5 Administration Guide Revision 6*. The revision number applies to the document and indicates that there were revisions to the document since its original release.

It is recommended that you periodically check the Knowledge Base for revisions to documents for the products your enterprise is using.

To access Autonomy documentation

1. Go to the Autonomy Customer Support site at

   https://customers.autonomy.com

2. Click **Login**.
3. Enter the login credentials that were given to you, and then click **Submit**.

   The Knowledge Base Search page opens.

4. In the **Search** box, type a search term or phrase. To browse the Knowledge Base using a navigation tree only, leave the **Search** box empty.
5. Ensure the **Documentation** check box is selected.
6. Click **Search**.

   Documents that match the query display in a results list.

7. To refine the results list, select one or more of the categories in the **Filter By** pane. You can restrict results by
   - **Product Group**. Filters the list by product suite or division. For example, you could retrieve documents related to the iManage, IDOL, Virage or KeyView product suites.
   - **Product**. Filters the list by product. For example, you could retrieve documents related to IDOL Server, Virage Videologger, or KeyView Filter.
   - **Component**. Filters the list by a product's components. For example, you could retrieve documents related to the Content or Category component in IDOL.
   - **Version**. Filters the list by product or component version number.
   - **Type**. Filters the list by document format. For example, you could retrieve documents in PDF or HTML format. Guides are typically provided in both PDF and HTML format.
8. To open a document, click its title in the results list.

   To download a PDF version of a guide, open the PDF version, click the Save icon in the PDF reader, and save the PDF to another location.

Related Documentation

The following documents provide more details on Connected Backup:

- *Product Overview*
- *Installing PC Agents*
- *Administering PC Agents*
- *Administering Mac Agents*
- *Installing the Data Center*
- *Administering the Data Center*
- *Upgrading the Data Center*
- *Data Center Disaster Recovery*
- *Account Management Web Services Development*
- *DataTransfer API Administration Guide*
- *Connected Backup for PC Agent Quick Start*
- *Connected Backup for Mac Agent Quick Start*
- *Web Services Programming Reference*
- *Connected Backup Release Notes*
- *Connected Backup Agent Version Matrix*
- *Connected Backup Interoperability Matrix*
- *Connected Backup Requirements Matrix*
- *Connected Backup Application Localization Matrix*
- *Connected Backup Documentation Localization Matrix*

In addition, all Connected Backup applications include online help.

Conventions

The following conventions are used in this document.

Notational Conventions

This document uses the following conventions.

Convention	Usage
Bold	User-interface elements such as a menu item or button. For example: Click **Cancel** to halt the operation.
Italics	Document titles and new terms. For example: ■ For more information, see the *IDOL Server Administration Guide*. ■ An *action command* is a request, such as a query or indexing instruction, sent to IDOL Server.
`monospace font`	File names, paths, and code. For example: The `FileSystemConnector.cfg` file is installed in `C:\Program Files\FileSystemConnector\`.
`monospace bold`	Data typed by the user. For example: ■ Type **`run`** at the command prompt. ■ In the **User Name** field, type **`Admin`**.
`monospace italics`	Replaceable strings in file paths and code. For example: `user` *`UserName`*

Command-line Syntax Conventions

This document uses the following command-line syntax conventions.

Convention	Usage
[optional]	Brackets describe optional syntax. For example: [-create]
|	Bars indicate "either | or" choices. For example: [option1] | [option2] In this example, you must choose between option1 and option2.
{ required }	Braces describe required syntax in which you have a choice and that at least one choice is required. For example: { [option1] [option2] } In this example, you must choose option1, option2, or both options.
required	Absence of braces or brackets indicates required syntax in which there is no choice; you must type the required syntax element.
variable <variable>	Italics specify items to be replaced by actual values. For example: -merge *filename1* (In some documents, angle brackets are used to denote these items.)
...	Ellipses indicate repetition of the same pattern. For example: -merge *filename1*, *filename2* [, *filename3* ...] where the ellipses specify, *filename4*, and so on.

The use of punctuation—such as single and double quotes, commas, periods—indicates actual syntax; it is not part of the syntax definition.

Notices

This document uses the following notices:

CAUTION A caution indicates an action can result in the loss of data.

IMPORTANT An important note provides information that is essential to completing a task.

NOTE A note provides information that emphasizes or supplements important points of the main text. A note supplies information that may apply only in special cases—for example, memory limitations, equipment configurations, or details that apply to specific versions of the software.

TIP A tip provides additional information that makes a task easier or more productive.

Autonomy Product References

This document references the following Autonomy products:

- Connected Backup

Autonomy Customer Support

Autonomy Customer Support provides prompt and accurate support to help you quickly and effectively resolve any issue you may encounter while using Autonomy products. Support services include access to the Customer Support Site (CSS) for online answers, expertise-based service by Autonomy support engineers, and software maintenance to ensure you have the most up-to-date technology.

To access the Customer Support Site, go to

https://customers.autonomy.com

The Customer Support Site includes:

- **Knowledge Base**: The CSS contains an extensive library of end user documentation, FAQs, and technical articles that is easy to navigate and search.
- **Case Center**: The Case Center is a central location to create, monitor, and manage all your cases that are open with technical support.
- **Download Center**: Products and product updates can be downloaded and requested from the Download Center.
- **Resource Center**: Other helpful resources appropriate for your product.

To contact Autonomy Customer Support by e-mail or phone, go to

http://www.autonomy.com/content/Services/Support/index.en.html

Contact Autonomy

For general information about Autonomy, contact one of the following locations:

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CHAPTER 1

Install

This chapter describes how to install Connected Backup Agents.

- Preparation
- Distribution Methods

Preparation

To install a Connected Backup Agent on a computer, you must meet the following requirements:

- Existing Agent Configuration
- User computer system requirements
- System permissions

Existing Agent Configuration

To deploy Agents, you must create an Agent configuration in Support Center. An Agent configuration contains the features and settings that comprise an Agent, including the Agent version and the default file selection rules.

For more information, refer to *Administering Mac Agents* and Support Center Help.

User Computer System Requirements

For requirements that a computer must meet before you can install the Agent, refer to *Connected Backup Requirements Matrix*.

System Permissions

To install an Agent, you must log on to the computer with local administrator privileges during the Agent installation process.

Distribution Methods

After you have established that the Agent system requirements have been met, choose from the following available Agent distribution methods:

- Using the Account Management Website
- Using the command-line installation program
- Using disk image pre-install

Use the Account Management Website

The Account Management Website enables users to manage their own accounts, which includes the following tasks:

- Create a new Connected Backup account.
- Download an Agent Setup file.
- Install the Agent on a computer.

NOTE For information about how to access the Account Management Website, contact the Data Center administrator.

Administrator Tasks

To obtain the URL for the Agent configuration to use for the Agent deployment

1. Open a Web browser, and then log on to Support Center.
2. Navigate to the community where you want to create the account. The community contains the Agent configuration to deploy.

3. Expand the **Configurations** node, and then expand the **Mac** subnode.

> **NOTE** You cannot create accounts in the root community. If you create an Agent configuration in the root community, to obtain a URL, navigate to a subcommunity.

4. Select the name of the Agent configuration to deploy.
5. On the View or Edit Mac Agent Configuration page, scroll to the bottom of the page, and then copy the Account Management Registration URL.

> **NOTE** The Account Management Registration URL is case sensitive.

You can now provide the Account Management Registration URL to your users to begin the Agent deployment process.

Agent Installation

To use the Account Management Website to install an Agent on a computer

1. On the user’s computer, open a Web browser, and then log on to the Account Management Website by navigating to the Account Management Registration URL.
2. Click **Register and Download**.
3. To accept the End User License Agreement (EULA), click **Accept**.
4. Type the account registration information. Be sure to complete required fields, which are marked with an asterisk.

> **NOTE** Unless your Agent community uses LDAP, remember the email address and password that you enter during this step. You need this information to gain access to the Account Management Website to finish the Agent installation and manage the account.
>
> A valid password must meet the following requirements:
>
> - Is between 6 to 100 alphanumeric characters, inclusive.
> - At least one character must be different than the other characters.
> - Must not begin or end with a space.

5. Click **Continue**.

   The Account Management Website creates a Connected Backup account for the user's Agent backups on the Data Center.

6. To create an Agent Setup file for your computer, click **Download Software**.
7. The Preparing the Software to Download page opens. When the file is ready, the Web browser displays the Download Instructions page.
8. Click **Begin Download**.

   The File Download dialog box opens.

   The Agent Setup file is bound to the account number created for the user during the registration process. You cannot use the Agent Setup file install the Connected Backup Agent for other users.

9. Create or navigate to the folder to contain the Agent Setup file, and then click **Save**.
10. Navigate to the folder that contains the Agent Setup file, and then double-click `AgentSetup.zip`.
11. Double-click `AgentSetup.mpkg`.
12. Follow the on-screen instructions to complete the installation.

    When the installation completes, the Installation Complete dialog box opens.

13. To exit the Agent Setup program, click **Finish**.
14. When the Agent starts, at the prompt, type the password that you specified during registration.

    You see this prompt only the first time that you open the Agent after its initial installation.

The Connected Backup Agent is now available for use on the user's computer.

Use the Command-line Installation Program

An Agent Setup file that is not directly associated with one account is available from Support Center for Agent configurations. This generic Agent Setup file enables you to distribute the Agent to multiple users' computers, and then install an account via the command-line.

The command-line installation method enables you to use any file distribution method to create scripts or wrappers and distribute the Agent Setup file to multiple clients. You also can use third-party file distribution software.

Administrator Tasks

To obtain the Agent Setup file to use for the Agent deployment

1. Open a Web browser, and then log on to Support Center.
2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **Mac** subnode.
3. Select the name of the Agent configuration to deploy.
4. On the View or Edit Mac Agent Configuration page menu, click **Download**.

   The Download Agent Setup page opens.
5. Click **Download**.

   The Save As dialog box opens.
6. Navigate to the folder in which you want to save the Agent Setup file, and then click **Save**.

To deploy the Agents, use the downloaded Agent Setup file.

Agent Installation

To use the command-line installer, you must extract the AgentSetup.mpkg from the AgentSetup.zip file.

To install the Agent on users' computers with the downloaded Agent Setup file, type the following command in a terminal window:

```
sudo path/AgentSetup.mpkg/Contents/Resources/install
parameters
```

where

- `path` is the path name that contains the `AgentSetup.mpkg` file.
- `parameters` is one or more of the Agent Setup command-line parameters. For a complete list of available parameters, see "Command-line Agent Setup File Parameters" on page 40.

Examples

The following examples represent some uses of the command-line installation method to install a Connected Backup Agent:

Example 1

Agent install without user intervention

```
sudo AgentSetup.mpkg/Contents/Resources/install
```

Example 2

Agent install without user intervention, and installation logs stored in `log file.txt`:

```
sudo AgentSetup.mpkg/Contents/Resources/install LOGFILE="log
file.txt"
```

NOTE Whenever spaces exist in any command-line parameter, enclose the parameter in double-quotes (“).

Example 3

Agent install without user intervention, connecting to Active Directory account jbloggs, and backing up immediately after installation and registration:

```
sudo AgentSetup.mpkg/Contents/Resources/install LDAPID=jbloggs
FIRSTBACKUP=1
```

Example 4

Agent install for an account reserved with code ticket1, and using e-mail address joe.bloggs@mycompany.com and a password of password1:

```
sudo AgentSetup.mpkg/Contents/Resources/install
RESERVATIONCODE=ticket1 EMAILADDRESS=joe.bloggs@mycompany.com
PASSWORD=password1
```

Command-line Install with Apple Remote Desktop

Use Apple Remote Desktop to perform a command-line installation on multiple computers simultaneously.

When you use Apple Remote Desktop, you do not specify installation parameters that associate the Agent with a user. The Data Center assigns an account number to the Agent when the user opens the Agent for the first time, and the user can then update the account profile with identifying information.

To use Apple Remote Desktop to perform a command-line installation

1. Extract the **AgentSetup.mpkg** from the download **AgentSetup.zip** file.
2. Open Apple Remote Desktop.
3. From Apple Remote Desktop, select all of the computers on which you want to install the Agent.
4. From the Apple Remote Desktop Manage menu, select **Copy items**.

   The Copy items dialog box appears.

5. Select **AgentSetup.mpkg**.
6. From the Place items in drop-down menu, select **Top folder of the disk**.
7. Click **Copy**.

   Apple Remote Desktop sends the AgentSetup.mpkg file to the computers that you selected.
8. Click **Close**.
9. If they are not already selected, select the computers that received the AgentSetup.mpkg file.
10. From the Apple Remote Desktop Manage menu, select **Send UNIX command**.

    The Send UNIX Command dialog box appears.
11. In the **Command** field, type the following command:

    `/AgentSetup.mpkg/Contents/Resources/install`
12. For the **Run command as** option, select user.
13. In the User field, type **`root`**.
14. Click **Send**.

    Apple Remote Desktop installs the Agent on the selected computers.

Use Disk Image Installation

If you use pre-configured disk images for your computers, you can create and use an Agent Setup file not already associated with a Connected Backup account to install Agents. After you use a third-party disk-imaging tool to place the disk image that contains an unregistered Agent on a user’s computer, either the user or an administrator can activate Agent through a provided application, and the Data Center assigns the Agent an account number. The Agent can then back up to and retrieve files from the Data Center.

Since these unregistered Agent installations do not have account numbers, they do not use a license on the Data Center until they are activated by the user or an administrator.

NOTE For each Data Center environment that your users connect to, create a separate disk image that uses separate Agent Setup files.

Administrator Tasks

To obtain the Agent Setup file to use for the Agent deployment

1. Open a Web browser, and then log on to Support Center.
2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **Mac** subnode.
3. Select the name of the Agent configuration to deploy.
4. On the View or Edit Mac Agent Configuration page menu, click **Download**.

   The Download Agent Setup page opens.
5. Click **Download**.

   The Save As dialog box opens.
6. Navigate to the folder in which you want to save the Agent Setup file, and then click **Save**.

You now can begin the Agent deployment process using the downloaded Agent Setup file.

Agent Installation Using Agent Installation Wizard

To install the Agent on a disk image without registering an account number

1. Navigate to the folder that contains the Agent Setup file, and then double-click `AgentSetup.mpkg`.

   The Welcome window opens.
2. Select one of the following options:
   - **Create a disk image with a running service** - Installs an inactive Agent on the computer that users without administrator privileges can activate.
   - **Create a disk image only** - Installs an inactive Agent on the computer that requires a user with administrator privileges to activate.

   The User License Agreement window appears.
3. Click **Next**.
4. Follow the on-screen instructions to complete the installation.

   When the installation is complete, the Installation Complete dialog opens.
5. To exit the Agent Setup program, click **Finish**.

The Connected Backup Agent is now installed on the computer. This Agent is not associated with any accounts on the Data Center, and must be activated before computer backups are attempted.

Agent Installation Using Command-line Installation Program

To use the command-line installation program to install an Agent on a disk image, but not register an account on the Data Center, type the following command:

```
sudo path/AgentSetup.mpkg/Contents/Resources/install
DISKIMAGE=option
```

where

- *path* is the path name that contains the `AgentSetup.mpkg` file.
- *option* is one of the following disk image installation options:

Option	Description
`serviceon`	Installs an inactive Agent on the computer that users without administrator privileges can activate.
`serviceoff`	Installs an inactive Agent on the computer that requires a user with administrator privileges to activate.

If you do not specify an option for DISKIMAGE, an active Agent is installed by the command-line program. For more information about this parameter, see “Command-line Agent Setup File Parameters” on page 40.

The Connected Backup Agent is now installed on the computer. This Agent is not associated with any accounts on the Data Center, and must be activated before computer backups are attempted.

Activate Disk Image Installation Agents

Agents installed with these methods are inactive Agents, that do not back up files until an administrator or a user activates them.

To activate an Agent for users without administrator privileges

1. Start the Connected Backup Agent.
2. Click **Activate Now**.

   The Agent connects to the Data Center and registers an active account.

To activate an Agent that requires a user with administrator privileges to activate

1. Open a terminal window on the computer with the disk image pre-installed Agent.
2. To activate the Agent, type the following command:

```
sudo /Library/AgentService/bin/activate -registernow
```

The Agent connects to the Data Center and registers an active account.

For more information about additional command-line parameters for the Activate application, see “Activate Command Parameters” on page 48.

CHAPTER 2

Recover/Reinstall

This chapter describes how to recover and reinstall Agents.

- Preparation
- .Recovery Methods

Preparation

If your computer experiences a problem or you replace your computer's hard drive, you can reinstall the Connected Backup Agent and then reconnect to your existing account on the Data Center.

To recover an account, the following requirements must be met:

- User computer system requirements
- System permissions

User Computer System Requirements

For requirements that a computer must meet before you can install the Agent, refer to *Connected Backup Requirements Matrix.*

System Permissions

To install an Agent, you must log on to the computer with local administrator privileges during the Agent installation process

.Recovery Methods

You can recover accounts in the following ways:

- Using the Account Management Website
- Using the Agent Startup Wizard
- Using a disk image pre-install Agent
- Using the command-line installation program

Use the Account Management Website

You can access the Account Management Website for the user's account and download a new Agent Setup file to reinstall the Agent.

To recover a user's account using the Account Management Website

1. Open a Web browser, and then log on to the user's Account Management Website.

   To log on, use the logon credentials associated with the account, or select the **Access User's Online Account** link on the account's summary page in Support Center.

   NOTE In order to see the **Access User's Online Account** link in Support Center, be sure that your technician account has the Access Users' Data permission. If you do not have this permission, you cannot see or use the link.

   The Account Management Website opens with the user's account information.

2. Select **Reinstall Agent**.
3. Click **Download Software**.
4. To reinstall the Agent, follow the instructions on the Download Instructions page.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

NOTE Before you complete a backup, retrieve any files that are missing from the computer. The Agent marks any files that are missing from a computer after a recovery (for example, due to a computer replacement or hard drive recovery) as deleted. This might cause Compactor to remove files over time due to the file expiration rules.

Use the Agent Startup Wizard

You can let users recover their own accounts if the accounts' Agent configurations include the use of the Agent Startup Wizard. For more information about how to enable the Agent Startup Wizard in the Agent Settings for an Agent configuration, see Support Center Help.

To use the Agent Startup Wizard to recover an account

1. Navigate to the folder that contains the Agent Setup file, and then double-click `AgentSetup.zip`.

> **NOTE** Use the same Agent Setup file that was used to install the Agent. If the original Agent Setup file is not on the computer, download from Support Center an Agent Setup file that uses the same Agent version installed on the computer.

2. Double-click `AgentSetup.mpkg`.
3. In the Startup Options window, select **Recover an existing backup account**, and then click **Next**.
4. Follow the prompts and enter the information that is required to recover your account.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

> **NOTE** Before you complete a backup, retrieve any files that are missing from the computer. The Agent marks any files that are missing from a computer after a recovery (for example, due to a computer replacement or hard drive recovery) as deleted. This might cause Compactor to remove files over time due to the file expiration rules.

Use a Disk Image Installation Agent

You can use an Agent installed as part of a disk image that has not yet been used to register an account in order to recover an existing account, as long as the Agent configuration in use includes the use of the Agent Setup Wizard. For more information about how to enable the Agent Startup Wizard in the Agent Settings for an Agent configuration, refer to Support Center Help.

To use a disk image installation Agent to recover an account, activate the account, and then use the Agent Setup Wizard recovery procedure to complete the account recovery. For more information about Agent activation, see “Activate Disk Image Installation Agents” on page 21. For more information about how to use the Agent Setup Wizard to recover an account, see “Use the Agent Startup Wizard” on page 25.

Use the Command-line Installation Program

You can use the command-line installation program to recover accounts.

Administrator tasks

To obtain the Agent Setup file to use for the account recovery

1. Open a Web browser and log on to Support Center.
2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **Mac** subnode.
3. Select the name of the Agent configuration in use by the account.
4. On the View or Edit Mac Agent Configuration page menu, click **Download**.

   The Download Agent Setup page opens.
5. Click **Download**.

   The Save As dialog box opens.
6. Change the folder to the directory you want to save the Agent Setup file in, and then click **Save**.

You can now begin the account recovery process using the downloaded Agent Setup file.

Account Recovery

To use the downloaded Agent Setup file to recover an account on a user’s computer, type the following command:

```
sudo path/AgentSetup.mpkg/Contents/Resources/install
ACCOUNTNUMBER=account_number parameters
```

where

- *path* is the path name that contains the AgentSetup.mpkg file.
- *account_number* is the number of the account that you want to recover. Use the following syntax: nnnnn-nnnnn.
- *parameters* is one of the following Agent Setup command-line parameter options:

Options	Description
`TECHID=technician_id PASSWORD=` *`technician_password`*	Recovers account using a technician account. Both `TECHID` and `PASSWORD` are required, and require the technician account and technician password, respectively.
`USERPASSWORD=` *`user_password`*	Recovers account using the user's account password information. The *`user_password`* is the password associated with the Connected Backup account.

NOTE Be sure that your technician account has the Access Users' Data permission. If you do not have this permission, you cannot use the TECHID/PASSWORD option to recover an account.

For a complete list of available parameters, see "Command-line Agent Setup File Parameters" on page 40.

The Connected Backup Agent is installed and reconnected to the user's account. The Agent is now available for use on the user's computer.

NOTE Be sure to retrieve any files missing from the computer before completing a backup. Any files missing from a computer after a recovery (such as due to a computer replacement or hard drive recovery) will be marked as deleted by the Agent, which could cause their removal over time by the Compactor service per the file expiration rules.

Example

The following example demonstrates the use of the command-line installation method to recover an account:

Recover a user account with account number 10100-55436, using technician account sampletech and a technician password of stpassword123!:

```
sudo AgentSetup.mpkg/Contents/Resources/install
ACCOUNTNUMBER=10100-55436 TECHID=sampletech
PASSWORD=stpassword123!
```

CHAPTER 3

Upgrade

This chapter describes how to upgrade Agents.

- Scenarios
- Upgrade Methods

Scenarios

You can use the Agent upgrade process to install a newer version of an Agent on users' computers and also to change the Agent configuration in use by accounts. When you change the Agent configuration an Agent uses, you can configure the following attributes:

- Profile and Website settings
- Agent settings
- File selection rules
- Displayed Agent language

Upgrade Methods

Choose from the following available Agent upgrade methods:

- Using central administration
- Using the command-line installation program
- Using UpdateConfiguration (version 8.4x and later)

Use Central Administration

Use the central administration feature of Support Center to upgrade Agents to new Agent versions with minimal user interaction.

This option lets you use Support Center to upgrade Connected Backup Agents to newer versions without the use of third-party system management tools.

To use central administration to upgrade a single version 8.x Agent

1. Open a Web browser, and then log on to Support Center.

   NOTE Be sure that your technician account has the Change the Agent Configuration of Accounts permission. If you do not have this permission, you cannot complete this process.

2. Enable central administration for the community that contains the account associated with the Agent to be upgraded if it has not already been enabled.

   For more information about how to enable central administration, refer to Support Center Help.

3. Search for the account.
4. If Support Center displays multiple results, click the appropriate account number.

   The Account Summary page opens.

5. Select **Assigned Configuration**.

   The Change Agent Configuration page opens.

6. Select the new Agent configuration for the account from the list of available Agent configurations, and then click **Save and Deploy**.

The Data Center configures the account to use the new Agent configuration. The Data Center then changes the user’s Agent to the assigned Agent configuration during the Agent synchronization of the next backup.

To use central administration to upgrade multiple version 8.x Agents at the same time

1. Open a Web browser, and then log on to Support Center.

> **NOTE** Be sure that your technician account has the Change the Agent Configuration of Accounts and Run Reports permissions. If you do not have these permissions, you cannot complete this process.
>
> For more information about how to set technician account permissions, refer to Support Center Help.

2. Enable central administration for the community that contains the account associated with the Agent to be upgraded if it has not already been enabled.

   For more information about central administration, refer to Support Center Help.

3. Create a report template to generate a report that lists the accounts to be upgraded to a new Agent configuration.

   For more information about how to create report templates, refer to Support Center Help.

4. On the page for the created report template, click **Run Report**.
5. After the Support Center creates the report, select the report to view its contents.
6. Click **Select Accounts**.

   A check box appears to the left of each account listed by the report.

7. Select the accounts from the report to be upgraded to the new Agent configuration, and then click **Create Group**.

   For more information about groups, refer to Support Center Help.

8. On the Report page menu, click **Group** and then click Change Configuration.

   The Change Group Account Configuration page opens.

9. Select the new Agent configuration for the grouped accounts from the list of available Agent configurations, and then click **Save and Deploy**.

The accounts are immediately configured to use the new Agent configuration. The users' Agents are then changed to the assigned Agent configuration during the Agent synchronization portion of the next backup.

Use the Command-line Installation Program

An Agent Setup file that is not directly associated with one account is available from Support Center for Agent configurations. This generic Agent Setup file lets you distribute the Agent to multiple users' computers and then install an account via the command-line.

The command-line installation method lets you use any file distribution method to create scripts or wrappers and upgrade the Agent on multiple clients, without the use of central administration. You can also use third-party file distribution software such as Apple Remote Desktop.

To obtain the Agent Setup file to use for the Agent upgrade process

1. Open a Web browser and log on to Support Center.
2. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **Mac** subnode.
3. Select the name of the Agent configuration to deploy.
4. On the View or Edit Mac Agent Configuration page menu, click **Download**.

   The Download Agent Setup page opens.
5. Click **Download**.

   The Save As dialog box opens.
6. Change the folder to the directory you want to save the Agent Setup file in, and then click **Save**.

You can now begin the Agent deployment process using the downloaded Agent Setup file.

To use the downloaded Agent Setup file to upgrade the Agent on users' computers, type the following command:

```
sudo path/AgentSetup.mpkg/Contents/Resources/install
REINSTALL=ALL
```

where

- *`path`* is the path name that contains the `AgentSetup.mpkg` file.

Use UpdateConfiguration

The Agent installation folder of a version 8.4x or later Agent contains the UpdateConfiguration application. This application changes the Agent configuration that the installed account uses on the Data Center. This tool performs the following tasks:

- Upgrades an Agent to a later version, or an Agent that uses a different language.
- Changes the Profile and Website settings, rules, or Agent settings that are applied to an account.
- Changes the Agent branding.

To change the Agent configuration of an installed Agent

1. Open a Web browser, and then log on to Support Center.
2. Navigate to the community that contains the Agent configuration
3. In the community where you created the Agent configuration to deploy, expand the **Configurations** node, and then expand the **Mac** subnode.
4. Select the name of the new Agent configuration to use.
5. On the View or Edit Mac Agent Configuration page, scroll to the bottom of the page to view the Agent configuration ID to use with the UpdateConfiguration command.
6. To change the Agent configuration that the Agent uses on a user’s computer, type the following command:

   `updateconfiguration` *`options`*

The following table lists the options to use with the UpdateConfiguration file:

Option	Description
`-configuration [-configid]`	(Optional) Specifies the ID of the new Agent configuration.
`-techid [-id]`	(Optional) Specifies the technician account the Data Center requires to change the Agent configuration. Requires use of -password option.
`-password [-pw]`	(Optional) Specifies the technician account password that the command uses. Requires use of -techid option.

NOTE Be sure that your technician account has the **Change the Agent Configuration of Accounts** permission. If you do not have this permission, you cannot complete this process.

The Agent is immediately configured to use the new Agent configuration, and downloads the necessary files and settings to make the change without having to start or complete a backup.

NOTE UpdateConfiguration must use an Agent configuration that is available for use in the community where the account exists.

The UpdateConfiguration application also has a graphical user interface to collect the Agent configuration, Support Center technician, and technician password. The graphical user interface has the additional option to **Download any changes to the file set used in the Agent's current configuration**. This allows changes that are made to an Agent configuration on the Support Center to be sent to an Agent when central administration is turned off for a community.

When you run the application, the command prompt window displays errors and diagnostic messages regarding the Agent configuration change.

Examples

The following examples demonstrate the use of the UpdateConfiguration application:

Example 1

Update the installed Agent to use Agent configuration 152 on the Data Center by using a Support Center technician called Admin, with the password NewPass1:

```
UpdateConfiguration -configid 152 -techid Admin -pw NewPass1
```

Example 2

Update the installed Agent by displaying a dialog box that prompts for the required Agent configuration, Support Center technician, and technician password:

```
UpdateConfiguration
```

Example 3

Update the installed Agent to a new Agent configuration on the Data Center by using a Support Center technician called Admin, with the password NewPass1:

```
UpdateConfiguration -techid Admin -pw NewPass1
```

This example is useful if you have disabled central administration, but you assigned a new Agent configuration to an account.

CHAPTER 4

Remove/Uninstall

This chapter describes how to remove Agents from users' computers.

- Before You Begin
- Removal Methods

Before You Begin

To remove an Agent, you must have administrator privileges on the computer.

Removal Methods

To remove the Agent from your computer, use one of the following methods:

- Using the Mac interface
- Using the command-line installation program

Use the Mac Interface

To use the Mac interface to remove an Agent

1. In Finder, browse to one of the following locations:
   - If the Agent was a new installation, browse to `/Applications/Autonomy/Connected Backup`.
   - If the Agent was an upgrade from a previous version, browse to `/Applications/Iron Mountain/Connected Backup`.
2. Double-click **Uninstall Connected Backup**.

You have removed the Agent from the computer.

.Use the Command-line

To use the command-line to remove an Agent

1. Open the Terminal utility.

2. To remove the Agent, type the following command:

   ```
   sudo /Library/AgentService/bin/uninstall
   ```

You have removed the Agent from the computer.

CHAPTER 5

Reference

This chapter describes the parameters of the command-line applications involved with the installation, upgrade, and removal of Mac Agents.

Command-line Agent Setup File Parameters

You can use product-specific parameters with the Agent Setup file.

The following table describes the parameters for the Agent Setup file:

Parameter	Description
`ACCOUNTNUMBER`	Directs the Agent Setup file to recover a specific account. Use: Recovery Syntax: `ACCOUNTNUMBER`=value where value is a 10-digit account number in the format nnnnn-nnnnn. Required parameters: Use one of the following parameter options: ■ `TECHID` and `PASSWORD` ■ `USERPASSWORD` **NOTE** Do not use this parameter with any of the following parameters: ■ `COMMUNITYID` ■ `CONFIGURATIONID` ■ `EMAILADDRESS` ■ `FIRSTBACKUP` ■ `LDAPID` ■ `RESERVATIONCODE`
`COMMUNITYID`	Directs the Agent Setup process to use a community different from the one included in the Agent Setup file. Use: Install Syntax: `COMMUNITYID`=value where value is a valid community ID on the Data Center. Verify that the Agent configuration in use is active in the community specified by this parameter. If the Agent configuration is not active, the installation uses the default Agent configuration for the community. **CAUTION** The Agent Setup process does not validate the community ID provided by this parameter. The installation process fails if you use an invalid community ID. If this happens, reinstall the Agent with a valid community ID.

Parameter	Description
`CONFIGURATIONID`	Directs the Agent Setup process to use an Agent configuration different from the one included in the Agent Setup file. Use: Install Syntax: `CONFIGURATIONID`=value where value is a valid Agent configuration ID on the Data Center. **CAUTION** The Agent Setup process does not validate the Agent configuration ID provided by this parameter.
`DISKIMAGE`	Installs an inactivated Agent on a computer. Use: Install Syntax: `DISKIMAGE`=value where value is one of the following accepted values: ■ `no` - (Default) Installs an active and registered Agent. ■ `serviceoff` - Installs an inactive Agent on the computer that requires a user with administrator privileges to activate. ■ `serviceon` - Installs an inactive Agent on the computer that users without administrator privileges can activate. **NOTE** If you use this parameter to install an inactive Agent, installation fails if you use any of these additional parameters: ■ `ACCOUNTNUMBER` ■ `EMAILADDRESS` ■ `FIRSTBACKUP` ■ `LDAPID` ■ `PASSWORD` ■ `RESERVATIONCODE` ■ `REGISTRATIONFILE` ■ `TECHID` ■ `USERPASSWORD` **NOTE** The installation process fails if you attempt to install an inactive Agent on a computer that already has an Agent.

Parameter	Description
EMAILADDRESS	Specifies the email address for the created account. Use: Install Syntax: `EMAILADDRESS=value` where value is a valid email address, with domain (example, user@company.com) Required parameter: `PASSWORD` **NOTE** If you do not specify an e-mail address and password with an account during installation, the account is associated with the user's computer name.
FIRSTBACKUP	Specifies whether or not to run a backup after installation and registration. Use: Install Syntax: `FIRSTBACKUP=value` where value is one of the following accepted values: ■ **1**. Perform a backup after installation and registration. ■ **0**. (Default) Do not run a backup after installation and registration.
LDAPID	Specifies the enterprise directory user ID for the registration. Use: Install Syntax: `LDAPID=value` where value is a user name in the enterprise directory. You can use system variables with this parameter (example, %username%), but not registry variables. For accounts with reservation codes that are in an enterprise directory community, use this parameter with the account reservation code. **NOTE** Do not use this parameter with any of the following parameters: ■ EMAILADDRESS ■ RESERVATIONCODE
LOGFILE	Specifies the name and location of a log file for the Agent Setup file. Use: Install Syntax: `LOGFILE=value` where value is a file name with an absolute or relative path reference.

Parameter	Description
PASSWORD	Specifies the password for the created account. Use: Install Syntax: PASSWORD=value where value is a valid account password. Required parameter: EMAILADDRESS **NOTE** A valid account password consists of six to 100 alphanumeric characters and at least one character that differs from the other characters. **NOTE** If the created account is in an enterprise directory community, this parameter is ignored by the Agent Setup process.
PASSWORD	Specifies the password of the technician account to use for an account recovery. Use: Recovery Syntax: PASSWORD=value where value is the valid technician password for the technician account you are using for the account recovery. Required parameters: ACCOUNTNUMBER and TECHID
REGISTRATIONFILE	Directs the Agent Setup process to send user registration information in an XML file to the Data Center during the installation process. Use: Install Syntax: REGISTRATIONFILE=value where value is the location and name of an XML file that contains account registration information. **NOTE** If the XML file does not exist in the location provided by this parameter, the Agent installation process will complete, but with no user information fields populated. For more information about how to create the XML file for this parameter, see "REGISTRATIONFILE Fields" on page 45.

Parameter	Description
`RESERVATIONCODE`	Specifies an account reservation code to use for the created account. Use: Install Syntax: `RESERVATIONCODE`=value where `value` is a valid account reservation code from Support Center. **NOTE** When you install an Agent for an account in a community using an enterprise directory, do not use this parameter, but use LDAPID instead.
`TARGETDIR`	Specifies a different path in the Program Files folder to install the Agent. Use: Install Syntax: `TARGETDIR`=value where value is the complete path of the new installation folder, including drive letter.
`TECHID`	Specifies the technician account to use for an account recovery. Use: Recovery Syntax: `TECHID`=value where value is a technician account that exists in the account's community. Required parameters: `ACCOUNTNUMBER` and `PASSWORD` **NOTE** The technician account requires the Access Users' Data permission in the account's community to work with this parameter.
`USERPASSWORD`	Specifies the user's account password to use for an account recovery. Use: Recovery Syntax: `USERPASSWORD`=value where value is a valid account password. Required parameter: `ACCOUNTNUMBER`

REGISTRATIONFILE Fields

When you use the REGISTRATIONFILE parameter with the command-line installation, you instruct the Agent Setup process to read an XML file that contains registration field values for an account. These values are then associated with the new account by the Agent Setup process immediately after installation.

When you create an XML file for the registration information, be sure you include all of the available fields in the file. Values that do not have a value can be left blank between the opening and closing field tag.

The registration XML file cannot set field states, such as hidden, read-only or required. You must set states in the **Profile and Website Settings** page in Support Center.

The following table describes the fields within the REGISTRATIONFILE XML file:

Field name	Description
`FIRSTNAME`	Maximum character length = 32
`MIDDLENAME`	Maximum character length = 16
`LASTNAME`	Maximum character length = 64
`COUNTRY`	Maximum character length = 32
`ADDRESS1`	Maximum character length = 40
`ADDRESS2`	Maximum character length = 40
`ADDRESS3`	Maximum character length = 40
`CITY`	Maximum character length = 40

Field name	Description
STATE	Maximum character length = 40 This field connects to a localized field on the Account Management Website based on the locale it is installed in. The following list includes the localized field connections: ■ Canada: Province ■ France: Region ■ Germany: Region ■ Japan: Prefecture ■ UK: County ■ U.S.: State ■ All other countries: Region
POSTALCODE	Maximum character length = 11
EMAIL	Maximum character length = 100 If you use both this field and the EMAILADDRESS parameter, the installation ignores the value in EMAILADDRESS, and uses the value in this field.
COMPANY	Maximum character length = 64
DEPARTMENT	Maximum character length = 64
LOCATION	Maximum character length = 32
MAILSTOP	Maximum character length = 16
COSTCENTER	Maximum character length = 16
EMPLOYEEID	Maximum character length = 16
PHONE	Maximum character length = 32
EXTENSION	Maximum character length = 16
CUSTOM	Maximum character length = 255

NOTE You must use uppercase for the field names in the XML file that contains the registration information.

If any field values exceed the maximum character length for a field in the XML file, the installation generates error messages only in the Data Center DCMaint logs. In addition, the Agent Setup file does not display them in the command prompt window.

Enclose each registration field value in a CDATA section to ensure that the parser interprets values as character data, and not XML markup. If you leave out the CDATA section, the XML file incorrectly parses any special characters, such as “<“and “&” in the registration field values.

The Agent reads the XML information immediately after installation or account recovery, and then encrypts and sends the information to the Data Center. If you change the content of the registration XML file after installation, the Agent does not send updated registration fields to the Data Center.

Sample XML File Content

```
<REGISTRATIONFIELDS>
<FIRSTNAME><![CDATA[John]]></FIRSTNAME>
<MIDDLENAME></MIDDLENAME>
<LASTNAME><![CDATA[Smith]]></LASTNAME>
<COUNTRY></COUNTRY>
<ADDRESS1></ADDRESS1>
<ADDRESS2></ADDRESS2>
<ADDRESS3></ADDRESS3>
<CITY></CITY>
<STATE></STATE>
<POSTALCODE></POSTALCODE>
<EMAIL></EMAIL>
<COMPANY></COMPANY>
<DEPARTMENT></DEPARTMENT>
<LOCATION></LOCATION>
<MAILSTOP></MAILSTOP>
<COSTCENTER></COSTCENTER>
<EMPLOYEEID></EMPLOYEEID>
<PHONE></PHONE>
<EXTENSION></EXTENSION>
<CUSTOM><![CDATA[ASSETNUM324]]></CUSTOM>
</REGISTRATIONFIELDS>
```

Activate Command Parameters

The following table describes the command-line parameters for the Activate command:

Parameter	Description
`-account`	Specifies an account number to use for an account recovery with an inactive Agent. Required parameters: `-techid` and `-password`
`-firstbackup`	Starts a backup after Agent registration.
`-ldapid`	Specifies the enterprise directory user ID for the Agent registration.
`-password`	Specifies the password of the technician account to use for an account recovery. Required parameters: `-account` and `-techid`
`-registernow`	Directs the Activate command to start the Agent service, launch the Agent, and register the account. If you use this parameter, the Activate command behaves in one of the following ways: ■ If you enabled the Agent Startup Wizard for the Agent configuration, the Wizard opens. ■ If you did not enable the Agent Startup Wizard, the Agent registers immediately and anonymously. If you do not specify this option, the account registers after you restart the computer.
`-rescode`	Specifies the reservation code required by the Data Center for the Agent registration. The Data Center requires this parameter only if the community that the Agent is configured to use requires account reservation. For more information about account reservation, see Support Center Help.
`-techid`	Specifies the technician account to use for an account recovery. Required parameters: `-account` and `-password`
`-createdesktop shortcut`	Directs the Activate command to create a desktop shortcut to the Connected Backup PC Agent or Mac Agent, as appropriate.

Use the GetSettings Command

The GetSettings application displays the Agent configuration ID and community ID for an installed Agent.

The GetSettings application uses the following command-line syntax:

```
/Library/AgentService/bin/getsettings parameters
```

The following table describes the command-line parameters for the GetSettings application:

Parameter	Description
`-accountnum [-a]`	Displays Agent's 9-digit account number.
`-brief [-b]`	Abbreviates displayed output.
`-config [-c]`	Displays Agent configuration ID and community ID for Agent.
`-fileset [-f]`	Displays Agent's version and language.
`-lastbackup [-l]`	Displays time and status of last backup for Agent. **NOTE** You will receive error messages if you have not backed up this account.
`-registration [-r]`	Displays user registration information for the Agent on the current computer.
`-xml [-x]`	Converts the displayed output to XML format.

Examples

The following examples demonstrate the use of the GetSettings application:

Example 1

Display the account number, Agent configuration ID, and community ID of the Agent:

```
getsettings -a -c
```

Output:

```
Account Number = XXXXXXXXX
Community = YY
Configuration = ZZ
```

Example 2

Display the account number and version and language of the Agent, in brief format:

```
getsettings -a -f -brief
```

Output:

```
XXXXXXXXX, English 8.4.0.2
```

Example 3

Display the Agent configuration ID and community ID of the Agent, in XML format:

```
getsettings -c -xml
```

Output:

```
<RegistrationInfo>
<Community>2129</Community>
<Configuration>10955</Configuration>
</RegistrationInfo>
```

APPENDIX

Sample User Instructions

This appendix contains an example of information that you can provide to users if you want them to register an account and install the Agent. You can copy and modify the text in this template to communicate instructions to users.

- Register an Account and Install an Agent

Register an Account and Install an Agent

Your company uses Connected Backup software to back up and protect data. To protect the files on your computer, you must register a backup account and install the Connected Backup Agent software on your computer. To do so, you must complete the following procedures:

1. Register your backup account
2. Install an Agent on your computer
3. Open your Agent for the first time after installation
4. Start your first backup

This document tells you how to complete each procedure.

Step 1: Register Your Backup Account

1. Go to the Account Management Website in one of the following ways:
   - Click the link in the e-mail message that your system administrator sent to you.
   - Open your Web browser and enter the URL that your system administrator sent to you.

   The **Welcome** page opens.
2. Click **Register and Download**.

   The Registration page opens.
3. To accept the Service License Agreement, click **Accept**.
4. If the system prompts you to enter a reservation account code, enter the code that you received from your service provider, and click **Continue**.
5. If the system prompts you to enter a Network Logon ID, enter the network logon ID (or user name) and password that you use to log on to your network and click **Continue**.
6. Enter the required information on the Registration page.

   An asterisk identifies required fields.
7. Write down the e-mail address that you enter, and remember the password that you enter.

   You need this information for future reference. You also need your password to open the Agent for the first time.

IMPORTANT For security reasons, do not write down your password. When you create a password, create one that is easy for you to remember, but difficult for someone else to guess.

8. After you enter the required information on the Registration page, click **Continue**.

   The Account Management Website registers your account and displays the Registration Complete page.
9. To print a copy of this information, click **Print**.

   Store the printed account information in a secure location. You need this information to log on to the Account Management Website to manage your account online.
10. Click **Download Software**.

    The Creating Your Download page opens.

11. When the Download Instructions page opens, read the instructions, and then click **Begin Download**.

    The **File Download** dialog box opens.

12. Complete one of the following steps:

    - To save the Agent Setup file to your computer, click **Save**.
    - To run the Agent Setup program, click **Run**.

13. Continue to the next procedure, "Step 2: Install an Agent on Your Computer" on page 53.

Step 2: Install an Agent on Your Computer

1. Navigate to the default download location and double-click the Agent Setup file (`AgentSetup.mpkg`).
2. In the Welcome screen, click **Next**.

   The Application License dialog box opens.

3. Accept the license agreement, and then click **Next**.

   The Installation Options dialog box opens.

4. Accept the default installation location or browse to another location, and then click **Next**.

   The Installing Agent screen opens. This screen informs you about the progress of the installation. When the installation is complete, the Installation Complete screen opens.

5. To complete the installation, click **Finish**.
6. To open the Agent after you install it, continue to the next procedure, "Step 3: Open the Agent for the First Time After Installation" on page 54.

Step 3: Open the Agent for the First Time After Installation

After you install the Agent, the Agent opens automatically, and the Enter Password dialog box opens.

1. In the Enter Password dialog box, enter your account password.

   This is the password that you entered during account registration.

2. Click **OK**.

   You receive a message as the Agent synchronizes your account with the Data Center. After the Agent synchronizes with the Data Center, the Welcome to the Agent window opens.

3. For information about how to use the Agent for the first time and how to perform your first backup, click **Help**.

   You can print the Help topic for reference.

4. Close the Help topic, and then click **Close**

   The Welcome to the Agent window closes.

   The Backup Set tab opens and the Agent compiles your backup set. A Scanning message opens at the lower, left of this tab during that process.

   After the Agent compiles your backup set, the application displays the total number of files in the backup set and the total number of files scanned at the bottom of the Backup Set tab.

Step 4: Start Your First Backup

To start your first backup, click **Backup Now**.

You receive a backing up message. The first backup can take several hours to complete, depending on the number of files in your backup set and the speed of the network connection. Subsequent backups are smaller and faster because the Agent backs up only new files and changes to previously backed-up files.

You can close the Agent while a backup is in progress. You can view the results of the backup by reopening the Agent and viewing the Summary or History tab.

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