

File Dynamics CEDM 25.4 Installation Guide

Legal Notices

Condrey Corporation makes no representations or warranties with respect to the contents or use of this documentation, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Condrey Corporation reserves the right to revise this publication and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes.

Further, Condrey Corporation makes no representations or warranties with respect to any software, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Condrey Corporation reserves the right to make changes to any and all parts of the software at any time, without obligation to notify any person or entity of such revisions or changes. See the Software EULA for full license and warranty information with regard to the Software.

Any products or technical information provided under this Agreement may be subject to U.S. export controls and the trade laws of other countries. You agree to comply with all export control regulations and to obtain any required licenses or classification to export, re-export, or import deliverables. You agree not to export or re-export to entities on the current U.S. export exclusion lists or to any embargoed or terrorist countries as specified in the U.S. export laws. You agree to not use deliverables for prohibited nuclear, missile, or chemical biological weaponry end uses. Condrey Corporation assumes no responsibility for your failure to obtain any necessary export approvals.

Copyright © 2025 Condrey Corporation. All Rights Reserved.

No part of this publication may be reproduced, photocopied, or transmitted in any fashion without the express written consent of the publisher.

Condrey Corporation
120 North Laurens St.
Greenville, SC 29601
U.S.A.

<https://condreycorp.com/>

Third Party Systems

The software is designed to run in an environment containing third party elements meeting certain prerequisites. These may include operating systems, directory services, databases, and other components or technologies. See the accompanying prerequisites list for details.

The software may require a minimum version of these elements in order to function. Further, these elements may require appropriate configuration and resources such as computing, memory, storage, or bandwidth in order for the software to be able to perform in a way that meets the customer requirements. The download, installation, performance, upgrade, backup, troubleshooting, and management of these elements is the responsibility of the customer using the third party vendor's documentation and guidance.

Third party systems emulating any these elements must fully adhere to and support the appropriate APIs, standards, and protocols in order for the software to function. Support of the software in conjunction with such emulating third party elements is determined on a case-by-case basis and may change at any time.

Contents

File Dynamics CEDM 25.4 Installation Guide	1
Legal Notices	3
Third Party Systems	5
Contents	7
About This Guide	1
2 - Overview	2
3 - Licensing the Product	3
3.1 - License Overview	3
3.1.1 - License Version	3
3.2 - Obtaining an Evaluation License	3
3.3 - Obtaining Production License and Software	3
3.3.1 - Obtain the Activation Code	3
3.3.2 - Obtain the License File	4
3.3.3 - Obtaining the Software	4
4 - Configuring a SQL Server Instance	5
4.1 - SQL Server Requirements	5
4.1.1 - Supported Versions	5
4.1.2 - Supported Editions	5
4.1.3 - Dedicated Instance	5
4.2 - Install a New Instance of SQL Server	5
4.3 - SQL Server Post Configuration	12
5.1 - Administrator Access	15
5.1.1 - Installing Components on Member Servers	15
5.1.2 - Managing Active Directory Accounts	15
5.1.3 - Granting Proxy Access to Resource Servers	15
5.2 - Accessing the Product Contents	15
5.3 - Installing the Engine	15
5.4 - Installing or Updating the License	17

5.4.1 - Installing a New License	17
5.4.2 - Updating the License	18
5.5 - Configuring the Database	18
5.6 - Configuring the Engine	21
5.7 - Granting Access to Managed Storage	23
5.7.1 - Granting Rights	23
5.7.2 - Granting Privileges on a Member Server	24
5.7.3 - Granting Privileges on a Domain Controller	24
5.8 - Installing File System Agents	25
5.9 - Installing the Admin Client	28
5.10 - Authorizing the Agents	29
5.11 - Configuring Storage Resources	29

About This Guide

This installation guide provides network administrators who manage use and collaborative network storage resources with the concepts and procedures for installing and configuring OpenText File Dynamics CEDM 25.4.

2 - Overview

To install File Dynamics CEDM 25.4:

1. Start with *Licensing the Product (page 3)*.
2. Next, install a SQL Server instance that File Dynamics CEDM supports – see *Configuring a SQL Server Instance (page 5)* for details.
3. Finally, complete the installation.

3 - Licensing the Product

The following section provides an overview of available license types, along with the procedures for managing the license.

3.1 - License Overview

File Dynamics CEDM requires a production license file obtained from OpenText. Please note that the software and license is part of the File Dynamics CEDM entitlement.

3.1.1 - License Version

File Dynamics CEDM 25.4 requires a File Dynamics CEDM 7.0 license.

3.2 - Obtaining an Evaluation License

Email support@filedynamicsupport.com to schedule a product demonstration or obtain an evaluation license for File Dynamics CEDM.

Upon receiving an evaluation license, see *[Installing or Updating the License \(page 17\)](#)* for instructions.

3.3 - Obtaining Production License and Software

3.3.1 - Obtain the Activation Code

To obtain a File Dynamics CEDM 25.4 production license file, you must first retrieve your activation code from the OpenText software license site.



NOTE: Go to <https://sld.microfocus.com/mysoftware/contact/softwareContact> for instructions on downloading and activating the software from OpenText.

The Quick Start Guide and video links can assist with activating the software.

1. Go to <https://sld.microfocus.com/mysoftware/index>.
2. Follow the steps to activate File Dynamics CEDM 25.4.
3. Once you obtain the activation key, have it ready for the next steps to obtain the license file.

3 - Licensing the Product

3.3.2 - Obtain the License File

1. Go to <https://filedynamicssupport.com/License> and fill out the form with the required information.
2. Select product version 7.0 and enter the correct *Forest Root Name* for this product license.
3. Select *Activation* for the *License Type*.
4. Enter the *Licensed Seats Count*.
5. Enter the *Activation Code* you obtained from the customer center site.
6. Submit the form to receive an email with a link to download the license file.
7. Open the email and click **Download License File** to access the license file.
8. You will install the license during the CEDM Engine Configuration process – see *Installing or Updating the License (page 17)*.

3.3.3 - Obtaining the Software

To obtain the File Dynamics CEDM 25.4 software:

1. Go to <https://sld.microfocus.com/mysoftware/index>.
2. Select *Downloads*.
3. In the *Product* field select *File Dynamics*
4. Select the appropriate *Product Name* and *Version*.
5. Download the FileDynamics-CEDM-25.4.iso file.

4 - Configuring a SQL Server Instance

Use the following procedures to install a Microsoft SQL Server instance with the necessary settings to support File Dynamics CEDM.

SQL Server is a fully-featured database service that requires installation and maintenance planning before deployment. As a complete analysis of this maintenance is beyond the scope of this product's documentation, you should review Microsoft's SQL Server documentation to plan for separation of data and transaction logs, regular database backups, and transaction log and data growth.

4.1 - SQL Server Requirements

4.1.1 - Supported Versions

File Dynamics CEDM 25.4 supports the following versions of SQL Server:

- SQL Server 2022
- SQL Server 2019

4.1.2 - Supported Editions

The following editions of SQL Server are supported in production:

- SQL Server Express
- SQL Server Standard
- SQL Server Enterprise

If you do not already have SQL Server, you can download a current version of SQL Server for free at <https://www.microsoft.com/en-us/sql-server/sql-server-downloads>.

4.1.3 - Dedicated Instance

Due to security and collation considerations, you should configure a dedicated instance of SQL Server for File Dynamics CEDM.

4.2 - Install a New Instance of SQL Server

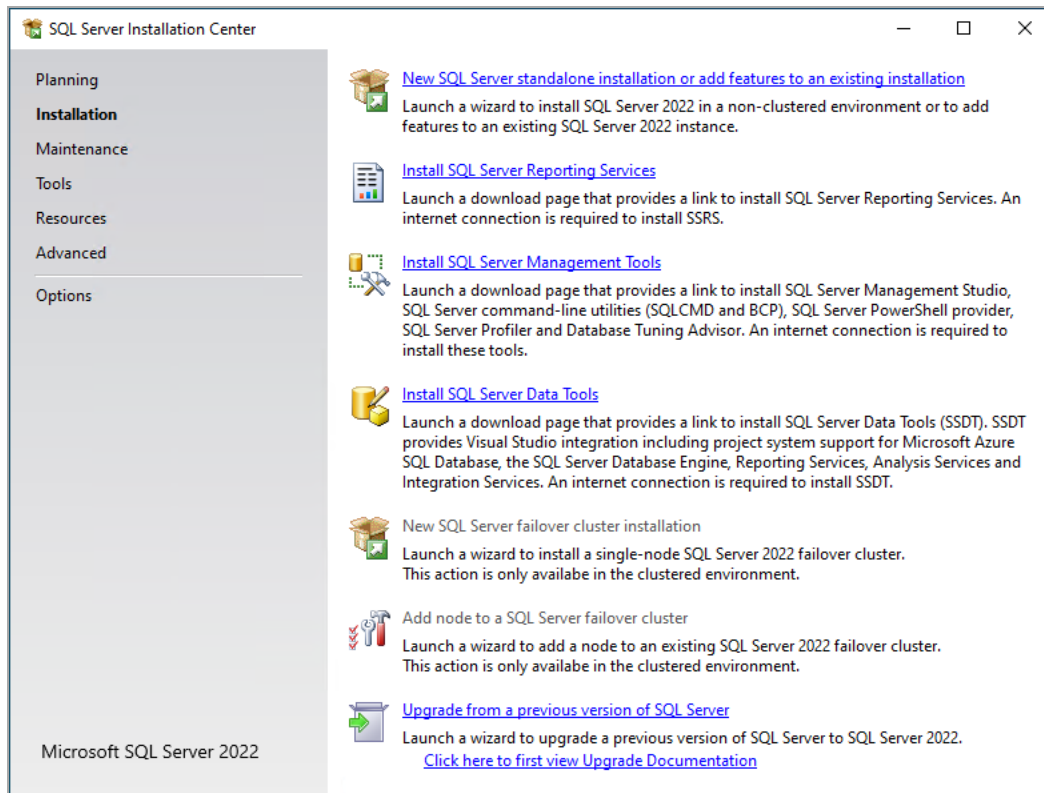
Installation procedures will vary based on your version of SQL Server. The following procedures are specific to Microsoft SQL Server 2022.

The following instructions assume you are installing a single instance of SQL Server on a Windows Server host with no Azure integration.

1. Double-click `setup.exe` from the Microsoft SQL Server ISO.
2. Click *Installation* on the SQL Server Installation Center page.

4 - Configuring a SQL Server Instance

3. Select *New SQL Server stand-alone installation or add features to an existing installation*.



4. Complete the following procedures in the SQL Server Setup wizard:
 - a. **Edition:** Select the SQL Server edition, enter the product key, and select the license option, then click *Next*.
 - b. **License Terms:** Accept the license terms and click *Next*.
 - c. **Global Rules:** View the results, then click *Next*.
 - d. **Microsoft Update:** Click *Use Microsoft Update to check for updates*, then click *Next*.
 - e. **Install Rules:** Review the results, then click *Next*.
 - f. **Azure Extension for SQL Server:** Uncheck *Azure Extension for SQL Server*, then click *Next*.
 - g. **Feature Selection:** Check *Database Engine Services*.

SQL Server 2022 Setup

Feature Selection

Select the Developer features to install.

Edition
License Terms
Global Rules
Microsoft Update
Product Updates
Install Setup Files
Install Rules
Azure Extension for SQL Server
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Ready to Install
Installation Progress
Complete

Looking for Reporting Services? [Download it from the web](#)

Features:

Instance Features

- ☒ Database Engine Services
- ☐ SQL Server Replication
- ☐ Machine Learning Services and Language Ext
- ☐ Full-Text and Semantic Extractions for Search
- ☐ Data Quality Services
- ☐ PolyBase Query Service for External Data
- ☐ Analysis Services

Shared Features

- ☐ Data Quality Client
- ☐ Integration Services
- ☐ Scale Out Master
- ☐ Scale Out Worker
- ☐ Master Data Services

Redistributable Features

Feature description:

The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer.

Prerequisites for selected features:

Already installed:

- Windows PowerShell 3.0 or higher

To be installed from media:

- Microsoft Visual C++ 2017 Redistributable

Disk Space Requirements

Drive	Required	Available
Drive C:	92 MB required	85947 MB available
Drive E:	902 MB required	129933 MB available

Select All Unselect All

Instance root directory: E:\Microsoft SQL Server\

Shared feature directory: E:\Microsoft SQL Server\

Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\

< Back Next > Cancel

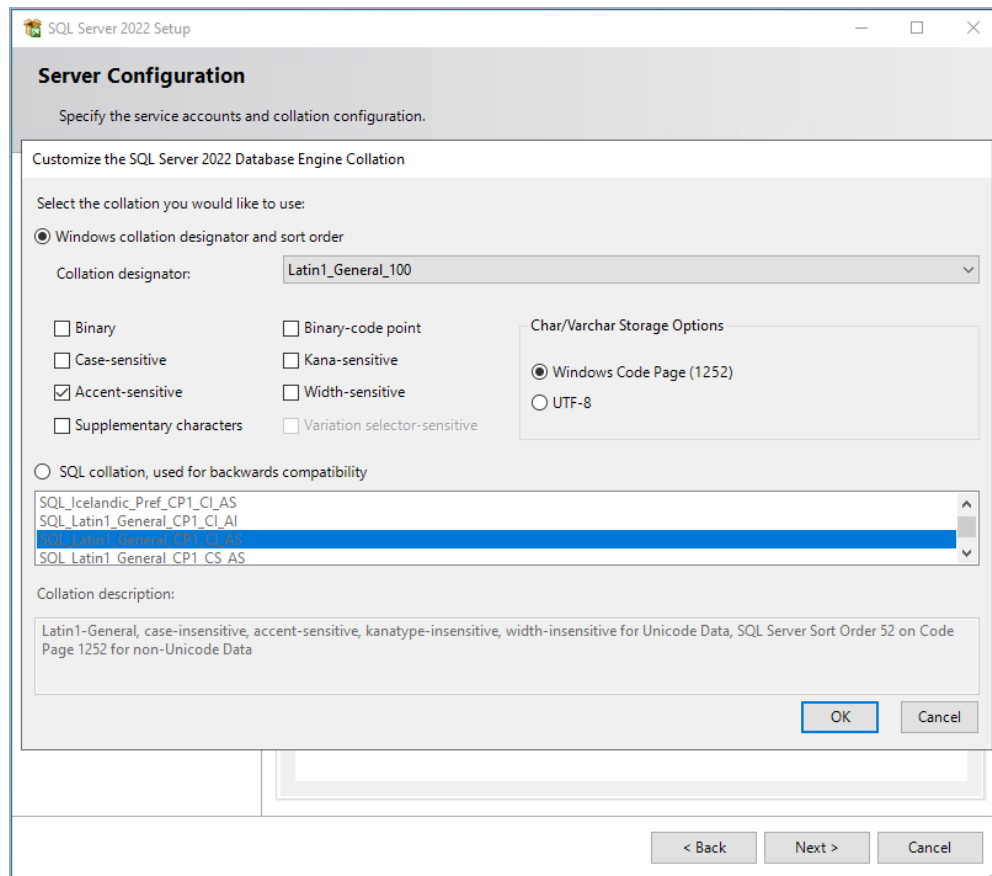
h. Review the installation paths, then click **Next**.



NOTE: For larger installations, consider installing the SQL Server instance on a separate volume by changing the *Instance Root Directory* path parameter.

- Feature Rules:** Review the results then click **Next**.
- Instance Configuration** - Select the appropriate instance type, modify the *Instance ID* if desired, then click **Next**.
- Server Configuration:** Select the *Collation* tab, then click **Customize**.

4 - Configuring a SQL Server Instance



- i. Select *Windows collation designator and sort order* in the *Customize the SQL Server 2022 Database Collation* dialog, then select your desired collation from the drop-down menu, preferably one that aligns with the Windows Server hosting the 25.4 Engine.

If you are unsure which collation to use, select *Latin1_General_100*, which is a safe option for File Dynamics CEDM.



NOTE: Select one of the *_100 or later collations, as these offer the best compatibility for advanced options such as *Supplementary characters*.

Refer to the following Microsoft document for more information on collation and locales:

<https://learn.microsoft.com/en-us/sql/relational-databases/collations/collation-and-unicode-support>.



IMPORTANT: 25.4 requires the use of a Windows collation. Legacy SQL collations are not supported.

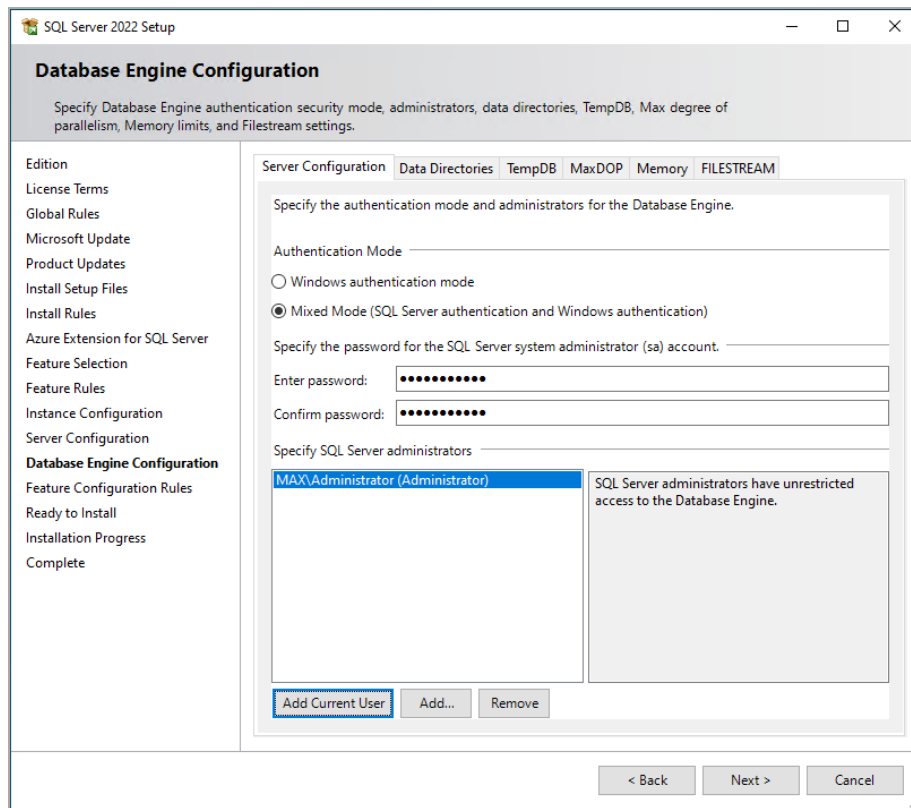
- ii. [Optional] Select *Accent-sensitive* and *Supplementary characters*.
- iii. [Optional] Select options for Kana-sensitive, Width-sensitive, and Variation selector-sensitive if you understand their impact with specific Asian character sets.
- iv. Deselect all other options.
- v. Select *Windows Code Page (1252)* for the **Char/Varchar Storage Options**.



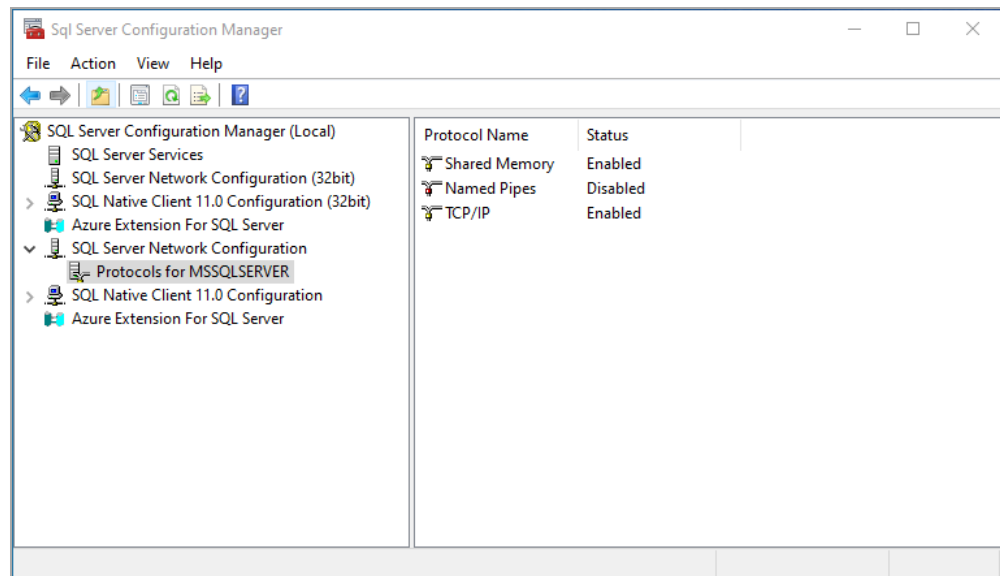
IMPORTANT: File Dynamics CEDM does not currently support the use of UTF-8 as a character storage option.

- vi. Click *OK* to close the customization dialog, then click *Next*.
- I. **Database Engine Configuration:** Complete the following procedures in this panel:
- i. Select *Mixed Mode (SQL Server authentication and Windows authentication)*.
 - ii. Enter a password for the sa account in the *Enter password* and *Confirm password* fields.
 - iii. Click *Add Current User* to add your current account to the *SQL Server administrators* list.

4 - Configuring a SQL Server Instance



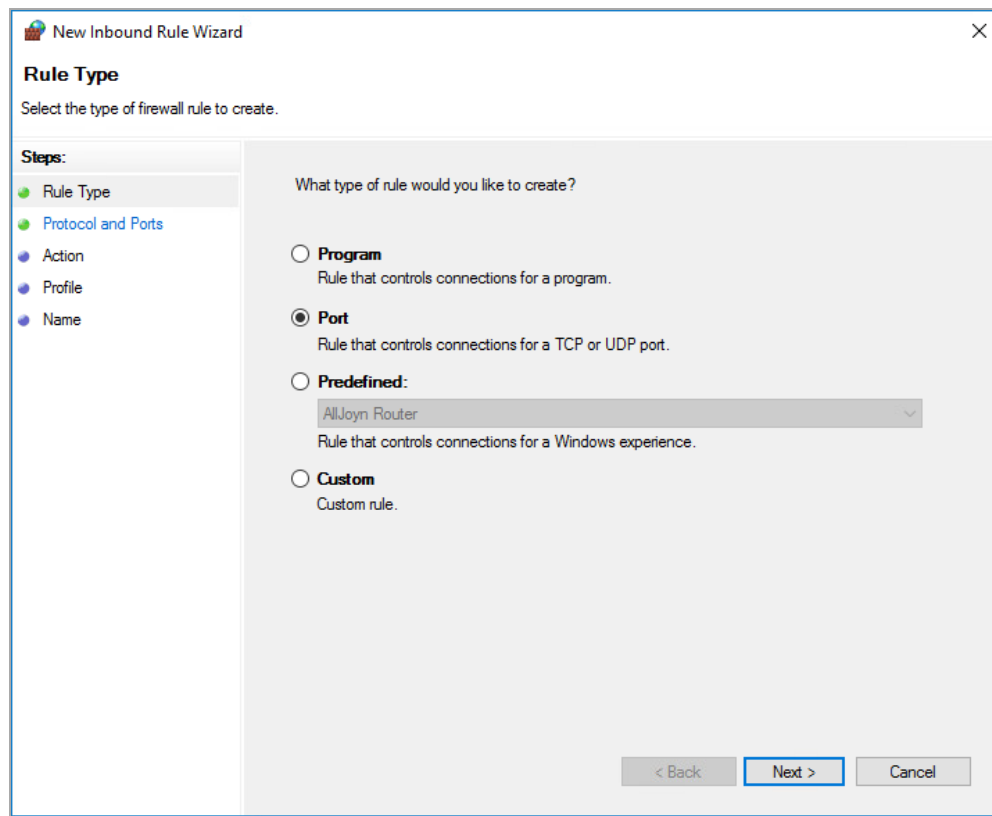
- iv. Review your selections, then Click *Next*.
 - m. **Feature Configuration Roles:** Review any messages, then click *Next*.
 - n. **Ready to Install:** Perform a final review of all installation options, then click *Install*.
 - o. **Complete:** Click *Close* once the installation is complete to exit the setup wizard.
5. From the Windows Start Menu launch *SQL Server Configuration Manager*.
- a. Expand *SQL Server Network Configuration* in the left-hand pane.
 - b. Click *Protocols for MSSQLSERVER* (or the name of the database instance you chose earlier).



- c. Right-click *TCP/IP* and select *Properties*.
 - d. Click the **Protocol** tab.
 - e. Set the *Enabled* field to *Yes*.
 - f. Set the *Listen All* field to *Yes*.
 - g. Click the **IP Addresses** tab.
 - h. Set the TCP Port field to 1433 under the *IPAll* heading at the bottom.
 - i. Click *OK*.
 - j. Close the SQL Server Configuration Manager.
6. Launch Windows Firewall with Advanced Security.
 - a. Click *Inbound Rules* from the left-hand column.
 - b. Click *New Rule* from the *Actions* column.

4 - Configuring a SQL Server Instance

- c. Select *Port* on the Rule Type page.



- d. Click *Next*.
- e. Enter `1433` in the *Specific local ports* field on the Protocol and Ports page, then click *Next*.
- f. Click *Next* on the Action page to accept the default setting.
- g. Click *Next* on the Profile page to accept the default settings.
- h. Specify a name (e.g., `SQL Server`) for the new inbound rule in the *Name* field on the Name page .
- i. Click *Finish*.

4.3 - SQL Server Post Configuration

Review the following and make any necessary adjustments to your SQL database settings before installing and configuring the CEDM Engine:

- Ensure that the SQL Server service is listening via TCP/IPv4, which is required for Engine access.

4 - Configuring a SQL Server Instance

- Ensure that the instance of SQL Server you just installed and configured is listening on TCP port 1433 (some editions of SQL Server do not enable TCP/IP by default).
- Update any necessary firewall rules.

5.1 - Administrator Access

5.1.1 - Installing Components on Member Servers

To configure the Engine and Agents, you must be logged in to the member server with an Active Directory domain account that has local Administrators (BUILTIN\Administrators) membership.

5.1.2 - Managing Active Directory Accounts

To configure the Engine service, you must be logged in to the member server with an Active Directory account that has access to create or modify domain groups and a proxy user account. This requirement is in addition to also having local Administrators group membership.

Membership in the Domain Admins group of the domain where the Engine server is installed is typically sufficient. If this is not possible, delegated write and modify access to users and groups in a container may suffice.

5.1.3 - Granting Proxy Access to Resource Servers

For Windows servers that will host managed shares but will not have an installed File System, you must set up local Administrators membership and privileges for the proxy account. You must have the same administrator access requirements as configuring an agent on that server.

5.2 - Accessing the Product Contents

A `FileDynamics-CEDM-25.4.iso` file comes with your purchase of File Dynamics CEDM 25.4.

1. Copy the `FileDynamics-CEDM-25.4.iso` file to a directory on the Windows server that will host the File Dynamics CEDM 25.4 Engine.
2. Mount the `FileDynamics-CEDM-25.4.iso` file and note the location as this is the source you will use to install File Dynamics CEDM 25.4 components.

5.3 - Installing the Engine

File Dynamics CEDM uses one Engine per forest. The Engine can be installed on a host server that meets the following **minimum** requirements:

- Microsoft Windows Server 2025 (Member Server)
- Microsoft Windows Server 2022 (Member Server)
- Microsoft Windows Server 2019 (Member Server)
- 4 GB RAM
- Forest functional level of Windows Server 2003 or later

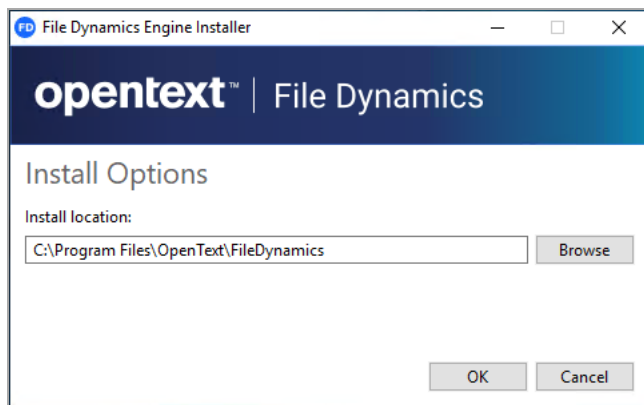
- Microsoft File System Resource Manager (FSRM) must be installed for quota management (see the *File Dynamics CEDM 25.4 Administration Guide*).

Note the following:

- The Engine runs as a service that is configured to start by using the Local System account.
- The default Engine port is 3012.
- The firewall inbound rule is added during the Engine installation.

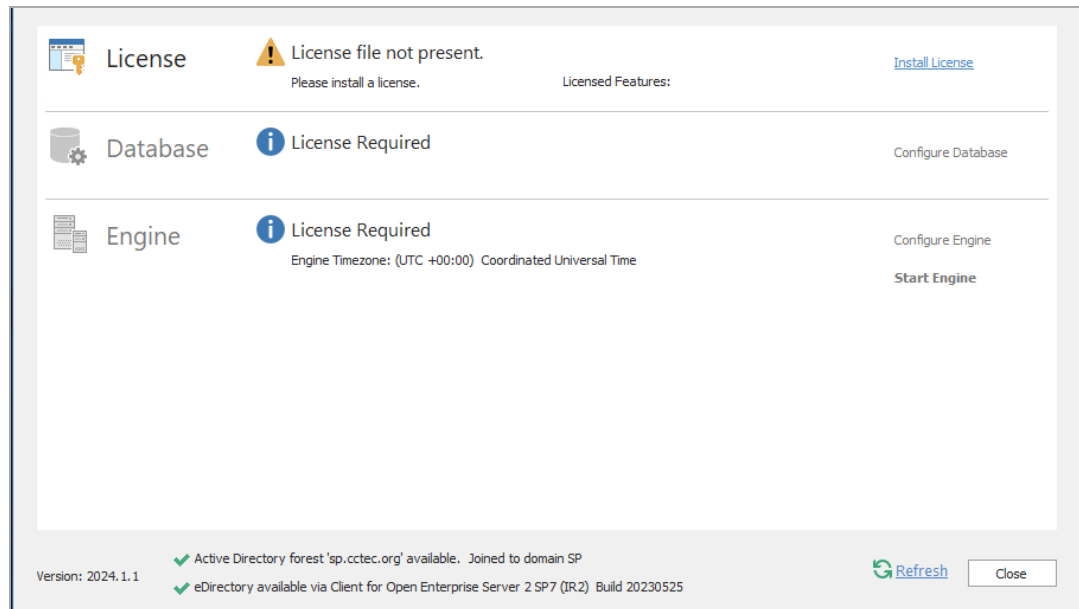
To install the Engine:

1. Double-click File Dynamics CEDM-Engine-25.4-xx.exe at the root of the FileDynamics-CEDM-25.4.iso image.
2. Click *Run* when asked if you want to run this file.
3. Agree to the licensing terms and conditions, then click *Next*.
4. (Conditional) Click *Options* to install the Engine to a location other than the default path.



5. Specify the new path in the *Install location* field, then click *OK*.
6. Click *Install*.
7. Read the overview on the first page of the wizard, then click *Next*.
8. Click *Install*.
9. Click *Finish* to close the wizard. The Install Successful message indicates that the Engine and Configuration Utilities were installed successfully.

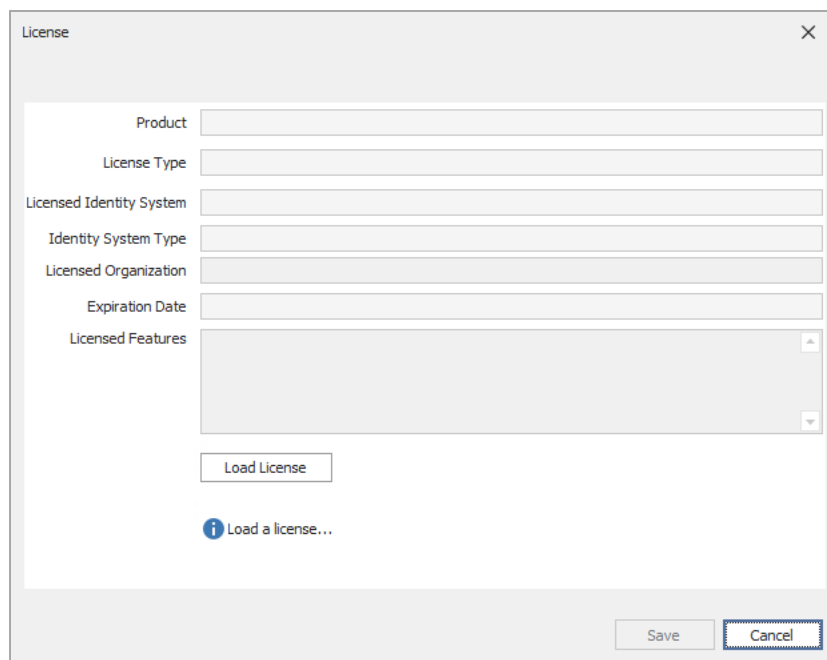
10. Click *Run Configuration Utility* to open the configuration interface.



5.4 - Installing or Updating the License

5.4.1 - Installing a New License

1. Click *Install License* in the Configuration Utility to open the License dialog.



2. If no license is found, the license properties will be empty.

3. Click *Load License*, then browse to and select your license file.
4. Examine the license properties to ensure that the license is valid.
5. Click *Save*.

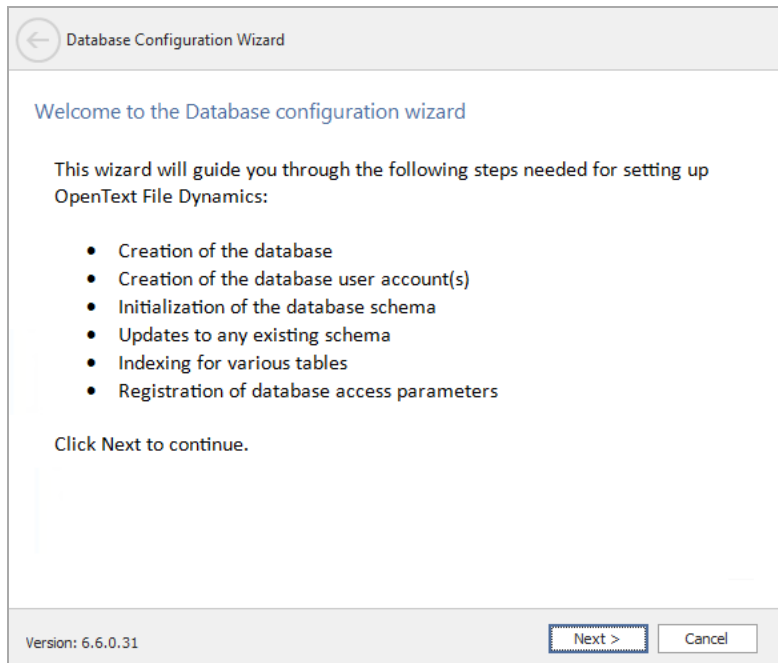
5.4.2 - Updating the License

After you install File Dynamics CEDM, you can update your evaluation license or production license by simply replacing the old license with the new one.

Use the same procedures above to replace an existing license.

5.5 - Configuring the Database

1. Click *Configure Database* in the Configuration Utility.



2. From the dialog that opens, review what will be configured, then click *Next* to start the configuration wizard.

The screenshot shows the 'Database Configuration Wizard' dialog box. It has a title bar with a back arrow and the text 'Database Configuration Wizard'. The main content area is titled 'Database Connection' and contains several sections: 'Database Properties' with a 'Type' dropdown set to 'SQL Server'; 'Communication' with fields for 'Database Host Address' (srs-m3.sp.cctec.org), 'Port' (1433), and 'Initial Database' (fsfdb); 'Database Service Account' with fields for 'Database Account Name' (fsfadmin), 'Password', and 'Verify Password'; and 'Database Admin Credentials' with a checkbox for 'Use Windows Authentication' (unchecked), and fields for 'Database Administrator' (sa) and 'Password'. At the bottom, there is a version string 'Version: 6.6.0.31' and two buttons: 'Next >' and 'Cancel'.

3. From this page, you establish the following settings necessary for the Engine to communicate with the database.

Database Properties: Displays information on the database.

- a. **Type:** Displays the supported database.

Communication: Specifies the address, port number, and name of the database.

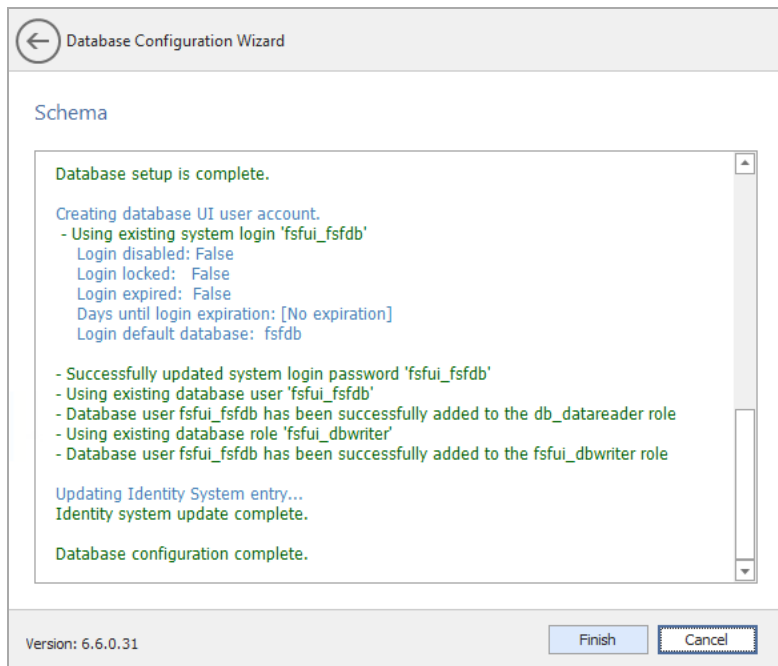
- b. **Database Host Address:** Specify the address of the server hosting the installed database.
- c. **Port:** The default SQL Server port setting is 1433, which you can change if there is a port conflict.
- d. **Initial Database:** The default name of the File Dynamics CEDM database.

Database Service Account: Set the authentication information for the database service account, which the Engine uses to sign in to the database.

- e. **Database Account Name:** The database account is cedmadmin by default, but you can change it in this field.
- f. **Password:** Specify a password for the service account to connect to the database.
- g. **Verify Password:** Enter the password again in this field.

Database Admin Credentials: Establish the database administrator name and credentials.

- h. **Use Windows Authentication:** Check this box to disable the *Database Administrator* and *Password* fields and configure the database using the authentication credentials of a Windows network administrator, rather than the credentials of a SQL Server database administrator.
 - i. **Database Administrator:** Enter the SQL Server administrator name.
 - j. **Password:** Enter the SQL Server administrator password.
4. Complete the fields, then click *Next*.



5. Review the configuration log, then click *Finish*.

5.6 - Configuring the Engine

1. Click *Configure Engine* in the Configuration Utility.
2. From the dialog that opens, review what will be configured, then click *Next*.

Configuration Wizard - Active Directory Mode

Basic Options

HTTP Listener

Host Address: 0.0.0.0

Port: 3009

SSL Certificate

Subject Name: srs-m3.sp.cctec.org

Expiration Days: 3,653

Expiration Date: 4/19/2033 3:41:15 PM

Key Length: 4096

Details Generate

Version: 6.6.0.31

Next > Cancel

3. From this page, you confirm or change basic Engine configuration settings.

HTTP Listener: Displays communication parameters for the Engine.

- a. **Host Address:** Leave the setting at 0.0.0.0 to listen to all addresses, or enter an address to limit listening to that specific address.
- b. **Port:** The default port is 3012.

SSL Certificate: Displays the details for the SSL certificate that will be generated.

- c. **Subject Name:** The server is listed as the default name of the certificate that will be generated, or you can enter a name.
- d. **Expiration Days:** Select the life span of the security certificate.
- e. **Key Length:** Select the SSL certificate encryption setting from the drop-down menu.
- f. **Details:** Click the button to view the certificate data.
- g. **Generate:** If you modify any of the settings in the SSL Certificate region, click this button to generate a new certificate.

4. Make any necessary edits to the parameter settings, then click *Next* to advance the wizard.

Configuration Wizard - Active Directory Mode

Active Directory Service Accounts

Proxy Account
Enter the name of a service account used by the Engine and Agents for all operations.

Proxy Rights Group
Enter the name of a service group used for rights assignments for access to server, share, and file resources. The Proxy Account will automatically be assigned as the initial member of this group.

Admins Group
The Admins Group is used to restrict access to logon and manage OpenText File Dynamics.
Note that the current logged on user SP\Administrator will be added to this group.

Proxy Account:

Proxy Rights Group:

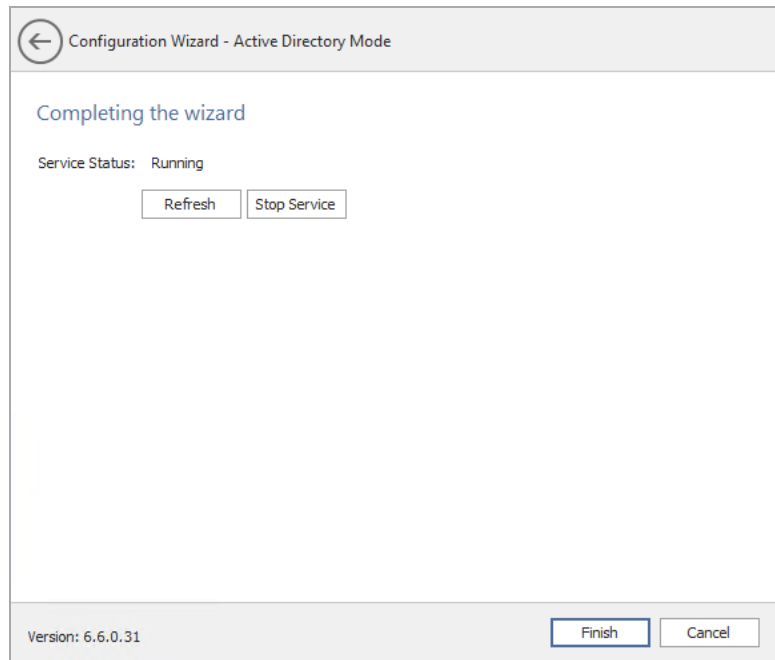
Admins Group:

Accounts Container:

Version: 6.6.0.31

5. File Dynamics CEDMuses proxy accounts to perform tasks necessary for storage management. From this page, you establish your proxy account settings:
 - a. Enter names for the Proxy Account, the Proxy Rights Group, and the Admins Group.
 - b. Click the Browse button to specify an Active Directory container for the proxy objects, appropriate to your environment (e.g., the Service Accounts container).

6. Once you establish your proxy account settings, click *Next*.



7. Click *Finish*.

5.7 - Granting Access to Managed Storage

You must set the proper rights on each network share that File Dynamics CEDM will manage (i.e., the target shares for migration). In addition, certain privileges must be granted on each server for which File Dynamics CEDM will manage storage.

5.7.1 - Granting Rights

Every share to be managed by File Dynamics CEDM must have proper rights assigned to the Proxy Rights group.

1. Authenticate as a user with privileges to manage shares to the server on which the storage is located.
2. Grant Full Control sharing privileges to the Proxy Rights group for each share that File Dynamics CEDM will manage.
3. Do one of the following:
 - a. To proxy storage on a member server, see [Granting Privileges on a Member Server \(page 24\)](#) for details.
 - b. To proxy storage on a domain controller, see [Granting Privileges on a Domain Controller \(page 24\)](#) for details.

5.7.2 - [Granting Privileges on a Member Server](#)

Every server on which File Dynamics CEDM manages storage must have certain privileges granted to the Proxy Rights group. If you install the Agent on a server, this privilege assignment is made automatically. If you use the Agent on one server to act as a Proxy Agent on another server—rather than installing an Agent on that server—you must assign these privileges on that server manually.

1. Log in as a domain administrator and authenticate to a domain controller within the domain where the storage is located.
2. Click *Start* on any domain controller or computer on which the Admin or Remote Server administration tools are installed, then open the *Administrative Tools* window.
3. Click *Active Directory Users and Computers*.
4. Select the container with the server in the left-hand pane.
5. Right-click the server in the right-hand pane and select *Manage* to open the Computer Management window.
6. Expand *Local Users and Groups* in the left-hand pane.
7. Select *Groups*.
8. Double-click *Administrators* in the right-hand pane to open the Administrators Properties dialog.
9. Click *Add* to open the Select Users, Computers, or Groups dialog.
10. Type: `domain_name\[Proxy Rights group name]` in the *Enter the object names to select* field.
11. Click *OK* to save the setting.

5.7.3 - [Granting Privileges on a Domain Controller](#)

Every server on which File Dynamics CEDM manages storage must have certain privileges granted to the Proxy Rights group. If you install the Agent on a server, this privilege assignment is made automatically. If you use the Agent on one server to act as a Proxy Agent on another server—rather than installing an Agent on that server—you must assign these privileges on that server manually.

1. Log in as a domain administrator and authenticate to a domain controller within the domain where the storage is located.
2. Launch Active Directory Users and Computers.
3. Select *Builtin* in the left-hand pane of the Active Directory Users and Computers window.
4. Double-click the *Administrators* group in the right-hand pane.
5. Click the *Members* tab.
6. Click *Add*.
7. Type the Proxy Rights group name in the *Enter the object names to select* field.

8. Click *Check Names*.
9. Click *OK*.
10. Click *OK*.

5.8 - Installing File System Agents

A File System Agent can be installed on a Windows Server machine that meets the following minimum requirements:

- Microsoft Windows Server 2025 (Member Server)
- Microsoft Windows Server 2022 (Member Server)
- Microsoft Windows Server 2019 (Member Server)
- Microsoft Windows Server 2016 (Member Server)
- 4 GB RAM
- **NOTE:** Microsoft File System Resource Manager (FSRM) must be installed for quota management – See the *File Dynamics CEDM 25.4 Administration Guide*.

Note the following:

- A File System Agent runs as a service that is configured to start using the Local System account.
- The default File System Agent port is 3014.
- A firewall inbound rule for the File System Agent is created during the installation.

To install the Agent:

1. Copy the `FileDynamics-CEDM-25.4.iso` to a directory on the Windows server that will host the File System Agent.
2. Mount the `FileDynamics-CEDM-25.4.iso` file.
3. Double-click `File Dynamics CEDM-FileSystemAgent-25.4-xx.exe` at the root of the `FileDynamics-CEDM-25.4.iso` image.
4. Click *Run* when asked if you want to run this file.
5. Agree to the licensing terms and conditions, then click *Install*.
6. Click *Run Configuration Utility* when notified that the setup was successful.

7. On the initial wizard page, review the setup steps and click *Next* to advance the wizard.

The screenshot shows a 'Configuration Wizard' window with a 'General Options' section. It contains two main configuration areas: 'HTTP Listener' and 'SSL Certificate'. The 'HTTP Listener' section has a 'Host Address' dropdown set to '0.0.0.0' and a 'Port' dropdown set to '3014'. The 'SSL Certificate' section has a 'Subject Name' text field with 'srs-m3.sp.cctec.org', an 'Expiration Days' dropdown set to '3,650', and a 'Key Length' dropdown set to '4096'. It also displays the 'Expiration Date' as '9/12/2033 4:05:18 PM' and includes 'Details' and 'Generate' buttons. At the bottom, it shows 'Version: 2024.1.1' and 'Next >' and 'Cancel' buttons.

Configuration Wizard

General Options

HTTP Listener

Host Address: 0.0.0.0

Port: 3014

SSL Certificate

Subject Name: srs-m3.sp.cctec.org

Expiration Days: 3,650

Key Length: 4096

Expiration Date: 9/12/2033 4:05:18 PM

Details Generate

Version: 2024.1.1

Next > Cancel

8. From this page, you confirm or change basic File System Agent configuration settings.

HTTP Listener: Displays the communication parameters for the File System Agent.

- a. **Host Address:** Leave the setting at 0.0.0.0 to listen to all addresses, or enter an address to limit listening to that specific address.
- b. **Port:** The default port is 3012.

SSL Certificate: Displays the details for the SSL certificate that will be generated.

- c. **Subject Name:** The server is listed as the default name of the certificate that will be generated, or you can enter a name.
- d. **Expiration Days:** Select the lifespan of the security certificate, which is set at 10 years by default.
- e. **Key Length:** Select the SSL certificate encryption setting from the drop-down menu, which is set at 2048 by default.
- f. **Details:** Click to view the certificate data.
- g. **Generate:** Click to generate a new certificate if you modify any of the settings in the SSL Certificate region.

9. Make any necessary edits to the parameter settings, then click *Next* to advance the wizard.

The screenshot shows the 'Configuration Wizard' window with the 'Engine Communication' tab selected. The title bar reads 'Configuration Wizard'. Below the title bar, the text 'Engine Communication' is displayed. Underneath, there is a section titled 'Engine Communication' containing two input fields: 'Engine Address' (a text box) and 'Engine Port' (a dropdown menu showing '3012'). At the bottom of the window, the version 'Version: 2024.1.1' is shown on the left, and 'Next >' and 'Cancel' buttons are on the right.

10. From this page, you set parameters for the File System Agent to communicate with the Engine.
 - a. **Engine Address:** Enter the DNS name or IP address to the server hosting the Engine.
 - b. **Engine SSL Port:** Select the SSL port for the Engine from the drop-down menu.
11. Once you establish your Engine connection settings, click *Next*.

The screenshot shows the 'Configuration Wizard' window with the 'Group Membership' tab selected. The title bar reads 'Configuration Wizard'. Below the title bar, the text 'Group Membership' is displayed. Underneath, there is a red warning icon followed by the text: 'The OpenText File Dynamics CEDM Proxy Rights Group has not been set. Please enter it to continue.' Below this message is a text box labeled 'Proxy Rights Group' containing the text 'SP\filedynamicscedmproxyrights'. At the bottom of the window, the version 'Version: 2024.1.1' is shown on the left, and 'Next >' and 'Cancel' buttons are on the right.

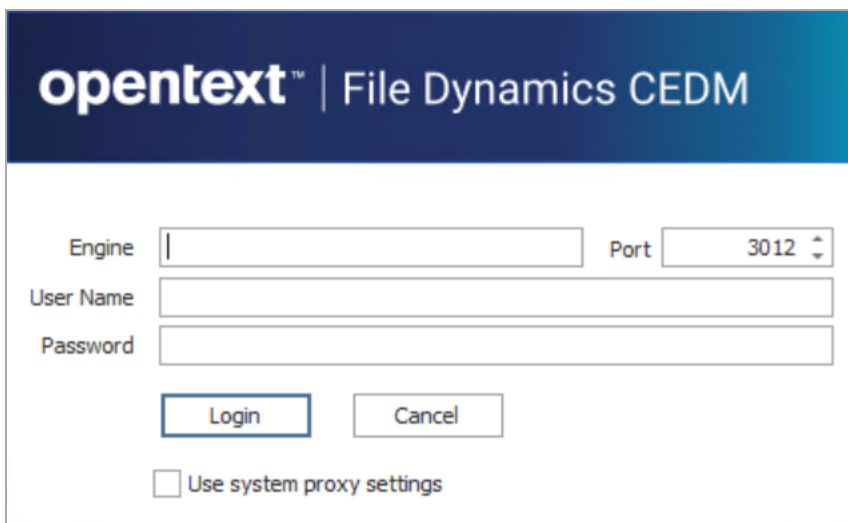
12. (Conditional) If you chose a name that was not the default name for the File Dynamics CEDM Proxy Rights group, enter that name in the *Proxy Rights Group* field.
13. Click *Next*.
14. Click *Refresh* to verify that the service is running.
15. Click *Finish*.

See [Authorizing the Agents \(page 29\)](#) to authorize the agent service.

5.9 - Installing the Admin Client

The administrative interface (Admin Client) for File Dynamics CEDM can be installed on any platform that can run .NET 9.0.

1. Copy the `FileDynamics-CEDM-25.4.iso` to a directory on the Windows server or workstation that will run the Admin Client.
2. Mount the `FileDynamics-CEDM-25.4.iso` file.
3. Double-click `File Dynamics CEDM-Admin-25.4-xx.exe` at the root of the `File Dynamics CEDM_25.4.0.iso` image, then click *Run* when prompted.
4. Agree to the licensing terms and conditions, then click *Install*.
5. when notified that the setup was successful, click *Run Admin Client* to open the login dialog.



The screenshot shows the 'opentext™ | File Dynamics CEDM' login window. It contains the following fields and controls:

- Engine:** A text input field.
- Port:** A dropdown menu currently showing '3012'.
- User Name:** A text input field.
- Password:** A text input field.
- Login:** A button.
- Cancel:** A button.
- ☐ **Use system proxy settings**

6. Enter the DNS name or IP address in the *Engine* field.
7. Select the secure port number from the drop-down menu in the *Port* field (3012 by default).
8. Enter the *User Name* and *Password*.

NOTE: The user must be a member of the File Dynamics CEDM Admins group to log in.

9. Click *Login*.

5.10 - Authorizing the Agents

1. Click the *Home* tab in the Admin Client.
2. Click *Agents*.
3. Select one or more listed servers.
4. Click *Authorize*.
5. Click *Yes* when asked if you want to authorize the selected event monitor.
6. Click *Close* when the Results page appears.
7. Repeat Steps 3-6 for all File System Agents.

5.11 - Configuring Storage Resources

Before File Dynamics CEDM can manage and report on your network storage, you must first configure your storage resources. As part of the configuration process, you will specify which servers to include for scoping and which to ignore.

1. Click *Storage Resources* in the *Home* tab of the Admin Client.
2. Browse the server directory in the *Scope* field to locate the containers or servers you want to include, and drag them into the *Include* field.

NOTE: If you do not specify which containers or servers to include, File Dynamics CEDM will process *all* the servers on your network.
3. (Optional) Right-click a server in the *Include* field and select *Share* to view information on the shares of that server.
4. Click *Save*.
5. Click *Yes* to update of the storage resources.