

# Hierarchical Storage Management for OpenVMS

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## Installation Guide

Order Number: AA-QUJ1F-TE

This manual contains installation information for HSM and Media and Device management Services (MDMS).

<b>Required Operating System</b>	OpenVMS V6.2 or higher
<b>Required Software</b>	Storage Library System for OpenVMS V2.9B or higher, <b>or</b> Media and Device Management Services for OpenVMS V2.9B or higher
	DECnet (Phase IV) or DECnet-Plus (PHASE V)
	TCP/IP Services for OpenVMS

**Revision/Update Information:**  
**This manual replaces AA-QUJ1E-TE.**  
**Software Version: HSM V3.0**

**Compaq Computer Corporation**  
**Houston, Texas**

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## A HSM Basic Mode Installation Example

**B HSM Plus Mode Installation Example**

**C HSM Logicals**

**D HSM Files**

**E MDMS Files and Logical Names**

**F MDMS V3.0 Rights and Privileges**

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# Preface

This document contains installation and configuration information about HSM for OpenVMS V3.0. Use this document to install, and configure your HSM environment.

## Intended Audience

The audience for this document are persons who install HSM software. The users of this document should have some knowledge of the following:

- OpenVMS system management
- DCL commands and utilities

## Document Structure

This document is organized in the following manner and includes the following information:

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Chapter 1	Provides an introduction to the HSM environment and how it complements your storage environment.
Chapter 2	Describes the MDMS installation and configuration tasks.
Chapter 3	Describes the HSM software and hardware requirements.
Chapter 4	Describes the HSM installation tasks.
Chapter 5	Describes the HSM configuration tasks in preparation for use.
Chapter 6	Describes configuring the HSM environment for remote access through DFS, NFS, or PATHWORKS.
Appendix A	Shows a sample HSM Basic mode installation.
Appendix B	Shows a sample HSM Plus mode installation.
Appendix C	Provides a list of the HSM Logicals used.
Appendix D	Provides a list of the HSM File names.
Appendix E	Provides a list of the MDMS Logicals used.
Appendix F	Provides a list of the MDMS File names.

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## Related Documents

The following documents are related to this documentation set or are mentioned in this manual. The lower case x in the part number indicates a variable revision letter.

Document	Order No
HSM for OpenVMS Installation and Configuration Guide	AA-QUJ1x-TE
HSM for OpenVMS Guide to Operations	AA-PWQ3x-TE
HSM for OpenVMS Command Reference Guide	AA-R8EXx-TE
HSM for OpenVMS Software Product Description	AE-PWNTx-TE
HSM Hard Copy Documentation Kit (Consist of the above HSM documents and a cover letter)	QA-0NXAA-GZ
Storage Library System for OpenVMS Guide to Backup and Restore Operations	AA-QHLEx-TE
Storage Library System for OpenVMS Installation Guide	AA-KY16x-TE
OpenVMS System Management Utilities Reference Manual: A-L	AA-PV5Px-TK
OpenVMS DCL Dictionary: A-M	AA-PV5Kx-TK
OpenVMS DCL Dictionary: N-Z	AA-PV5Lx-TK
OpenVMS License Management Utility Manual	AA-PVXUx-TK
OpenVMS User's Manual	AA-PV5Jx-TK

## Related Products

The following related products are mentioned in this documentation.

Product	Description
HSM	HSM refers to Hierarchical Storage Management for OpenVMS software.
MDMS	MDMS refers to Media and Device Management Services for OpenVMS software.
SLS	SLS refers to Storage Library System for OpenVMS software.
SSMgr	SSMgr refers to POLYCENTER Save Set Manager for OpenVMS software.



## Conventions

The following conventions are used in this document.

Convention	Description
{ }	In format command descriptions, braces indicate required elements. You must include one of the elements.
[ ]	Brackets show optional elements in a command syntax. You can omit these elements if you wish to use the default response.
: .	Horizontal ellipsis points indicate the omission of information from a sentence or paragraph that is not important to the topic being discussed
...	Vertical ellipsis points indicate the omission of information from an example or command format. The information has been omitted because it is not important to the topic being discussed.
<b>boldface</b>	Boldface type in text indicates the first type instance of terms defined in the Glossary or in text.
<i>italic</i>	Italic type emphasizes important information, type indicates variables, indicates complete titles of manuals, and indicates parameters for system information.
Starting test . . .	This type font denotes system response, user input, and examples.
Ctrl/x	Hold down the key labeled Ctrl (Control) and the specified key simultaneously (such as Ctrl /Z).
PF1 x	The key sequence PF1 x indicates that you press and release the PF1 key, and then you press and release another key (indicated here by x).
<i>n</i>	A lowercase italic <i>n</i> indicates the generic use of a number. For example, 19 <i>nn</i> indicates a four-digit number in which the last two digits are unknown.
<i>x</i>	A lowercase italic <i>x</i> indicates the generic use of a letter. For example, <i>xxx</i> indicates any combination of three alphabetic characters.
OpenVMS Alpha	This term refers to the OpenVMS Alpha operating system.
OpenVMS VAX	This term refers to the OpenVMS VAX operating system.

## Determining and Reporting Problems

If you encounter a problem while using HSM, report it to COMPAQ through your usual support channels.

Review the Software Product Description (SPD) and Warranty Addendum for an explanation of warranty. If you encounter a problem during the warranty period, report the problem as indicated previously or follow alternate instructions provided by COMPAQ for reporting SPD nonconformance problems.



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## Welcome to HSM

The information presented in this chapter is intended to give you an overall picture of a typical storage environment, and to explain how HSM complements that environment.

### 1.1 What Do All Storage Environments Have In Common?

All storage environments that plan to implement HSM have the following common hardware and software:

- OpenVMS™, VAX™ or Alpha systems
- OpenVMS software Version 6.2 or higher for VAX and Alpha systems
- Disk devices for online storage/transactions
- DECnet™ Phase IV or DECnet-Plus (Phase V)
- Tape drives
- Removable media that is compatible with the tape drives for storing shelved data

### 1.2 What Makes a Storage Environment Unique?

All storage environments have some or all of the following characteristics that make them unique:

- Mixed architecture (a combination of VAX and Alpha systems)
- Heterogeneous client systems (OpenVMS, NT, UNIX)
- Types of tape drives (TLZ06, TZ877, and so forth)
- Types of robotic devices (stackers/loaders/libraries)
- Types of tape drive connections (direct-connect SCSI or controller-connected)
- Location of tape drives (remote or local)
- Number of disks
- Number of tape drives
- Optical Devices

### 1.3 How Does HSM Complement Your Storage Environment?

On most storage systems, 80% of the I/O requests access only 20% of the stored data. The remaining 80% of the data occupies expensive media (magnetic disks), but is used infrequently. HSM solves this problem by automatically and transparently moving data between magnetic disk and low-cost shelf-storage (tapes or optical disks) according to file usage patterns

## Welcome to HSM

### 1.4 What is the Purpose of a Managed Media & Device Environment?

and policies that you specify. HSM is most suitable for large data-intensive storage operations where the backup times become excessive. By moving infrequently used data to off-line storage, HSM can greatly reduce the amount of backup time required. The benefits of using HSM are:

- Limits on-line capacity to frequently used files, thus speeding access to current data.
- Provides faster backups with less on-line data needing regular backup.
- The backup-via-shelving capability reduces backup requirements up to 90%.
- Storage administrators no longer need to manage disk capacity on a daily basis, since HSM monitors this for them.
- Production applications won't fail due to "disk full" or "disk quota exceeded" exceptions because HSM prevents disks from filling up.
- Allows you to customize your storage hierarchy according to your requirements.
- The tape re-packing feature recovers shelf space on tapes used for deleted files or obsolete data.
- The flexible management system lets you move files between disk volumes or systems without any unshelving.
- The multi-file savesets feature provides full use of tape capacity and greatly increased shelving performance.
- The multiple catalogs feature allows much larger HSM systems by not limiting the number of shelved files.

### 1.4 What is the Purpose of a Managed Media & Device Environment?

HSM software is dependent on the Media and Device Management Services (MDMS) software to access storage devices. The purpose of a managed media and device environment is to maintain a logical view of the physical elements of your storage environment to serve your nearline and offline data storage needs. A managed media and device environment defines the media and:

- the drives that can use the media.
- the locations where media is stored,
- the locations of the drives that are compatible with the media,
- and the policy that governs the use of media.

The following list summarizes the characteristics of the managed media and device environment:

- Media - are defined media types in MDMS. Media type definitions are stored in the MDMS volume configuration database. All managed media are known in terms of type, location, capability, availability, and authorization (permitted users of these media). Before you can use media in your managed storage environment, you must add the media to the MDMS volume configuration database, and initialize the media for use. Once this is done, the media start to be known as "volumes." HSM recognizes these media type definitions, and depending upon which media type your storage class uses, performs the shelving operation using the appropriate media type and tape drives.
- Tape drive definitions also are stored in MDMS. Tape drives are used to serve the volumes known to MDMS. The MDMS software maintains a logical link between the volumes and the compatible tape drives, both in terms of

physical and logical boundaries. Volumes and tape drives can be managed logically from locations miles away from where they are physically located. HSM depends upon MDMS to select the appropriate tape drives determined by the media type. HSM storage classes associate these logical connections.

- MDMS enables you to set the default criteria for moving and recycling volumes. These criteria include rotation between onsite and offsite locations for safekeeping of the volumes, and the schedule that moves the volume through its lifecycle (retention, use, and reuse). HSM enables you to set the retention criteria for data saved on volumes, while MDMS enables you to define when to move or recycle volumes.

## 1.5 Differences - HSM Basic& Plus Mode

HSM software operates in one of two modes:

- HSM Basic mode  
Provides shelving, preshelving, and unshelving functionality using simple devices, Digital Linear Tape (DLT) magazine loaders, and 4mm DAT loaders.
- HSM Plus mode  
Provides shelving, preshelving, and unshelving functionality using the full suite of devices supported through Media and Device Management Services for OpenVMS (MDMS), including robotically-controlled devices like TL820s and StorageTek™ silos.

Except for the media and device management configuration and support, both modes operate identically.

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**Note**

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**If you don't already have SLS installed on your system, then you must install MDMS before you can use the HSM Plus Mode functionality. Don't install MDMS if SLS is already present.**

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### 1.5.1 HSM Basic Mode Functions

HSM Basic mode provides the following functionality and features:

- Complete HSM functionality for small to medium customer environments that can use smaller capacity tape loaders (for example, DLT loaders), standalone tape devices, and magneto-optical devices
- A simple, integrated user interface provided completely by HSM
- Limited media management that is not integrated with other storage management products
- Support of up to 36 archive classes for data reliability
- An HSM naming convention for tape volume labels
- Local tape device support within the VMScluster™ environment: the shelf server nodes must have visibility to all tape devices (this can include TMSCP-served devices)

### 1.5.2 HSM Plus Mode Functions

HSM Plus mode provides the following functionality and features:

- Complete HSM functionality for medium to large customer environments that use large tape jukeboxes and for locations that already have the MDMS or SLS software installed

## Welcome to HSM

### 1.5 Differences - HSM Basic& Plus Mode

- Support for large capacity nearline devices that support multiple terabytes of data, such as the TL820 and StorageTek™ silos
- Common media management with other OpenVMS storage management products through the MDMS software
- Device and media management support provided through the MDMS command line and menu interfaces; this requires a more complex configuration process than for HSM Basic mode
- Support of up to 9999 archive classes for data reliability
- No fixed naming conventions for HSM tape volumes; the Storage Administrator controls volume names through MDMS
- Tape device support within the cluster: the shelf server nodes do not require direct visibility to all tape devices within the cluster
- Support for remote tape devices, those that are not directly connected within the cluster, through the Remote Device Facility™ (RDF) portion of MDMS

#### 1.5.3 HSM Mode Comparison Table

Table 1-1 identifies the functionality HSM for OpenVMS provides and which mode provides it.

**Table 1–1 HSM Basic and Plus Functionality**

<b>Function</b>	<b>Basic</b>	<b>Plus</b>
OpenVMS Versions	6.1 thru 7.1	6.1 thru 7.1
Supported hardware platforms	VAX, Alpha	VAX, Alpha
Common media and device management with other Digital storage products	No	Yes, through MDMS
Support for Digital Linear Tape (DLT) magazine loaders as robotically-controlled devices	Yes	Yes
Support for TL81x, TL82x	No	Yes
Maximum number of archive classes	36	9999
Requires specific HSM volume names	Yes	No
Provides support for remote devices	No	Yes
Uses a single, integrated interface for configuration and use	Yes	No

All other functions, including HSM policies and cache, are provided in both modes.

## 1.5.4 Choosing HSM Modes

One of the pivotal decisions you must make before starting HSM is which mode you wish to run in - Plus or Basic.

Select Plus mode if:

- You wish to have consolidated media management with other Storage Management products (e.g. SLS, ABS...)
- You are planning to use large multi-drive tape jukeboxes such as the TL81x, TL82x or StorageTek Silo
- You are planning to use any kind of remote (RDF - accessed) tape drive
- You wish to choose your tape volume labels, or use bar-coded volume labels

Select Basic mode if:

- You do not want consolidated media management, or are using an alternative media manager
- You are not using large multi-drive tape jukeboxes (for example, you can use single-drive TZ8xx loaders in either mode)
- You are not planning to use tapes at all (for example, you might be using optical jukeboxes)
- You should select the mode before continuing with any further HSM configuration.

## 1.5.5 HSM Mode Change Restrictions

You choose an HSM mode to operate when you install the HSM for OpenVMS software. However, you can change modes after you make the initial decision. The following restrictions apply to changing modes after installation:

- You can always change from Basic mode to Plus mode.
- You can change from Plus mode to Basic mode only if you have not written any shelved file information to a catalog in Plus mode. Once you write information to a catalog in Plus mode, you cannot change back to Basic mode.
- For a change in operating mode to have effect, you must restart HSM.

## 1.6 HSM License Types

HSM offers three kinds of license types:

- HSM Base licenses
- HSM Capacity licenses
- HSM Concurrent Use licenses

### 1.6.1 HSM Base Licenses

A base HSM license is required to use HSM. This base license provides 20 GB of capacity. Additional capacity licenses are available as is an unlimited capacity license. The capacity is calculated according to the online storage space freed up when files are shelved. The total capacity is checked against the allowable capacity when a shelving operation occurs. If you exceed your

## Welcome to HSM

### 1.6 HSM License Types

capacity license, users will be able to unshelve data, but will not be able to shelve data until the license capacity is extended.

When you shelve a file, the amount of space freed up by the file's truncation is subtracted from the total capacity available. When you unshelve or delete the file, its allocated space is added to the capacity available. Periodically, HSM scans the volumes in the VMScluster™ system and compares the amount of storage space for the shelved files to the remaining capacity. The SMU SHOW FACILITY command displays the license capacity remaining for the HSM facility (VMScluster™ system).

Base licenses are available for all-VAX clusters, all-Alpha clusters, and mixed architecture clusters. These base licenses are shown in Table 1-2.

**Table 1–2 HSM Base Licenses**

<b>Base Licenses:</b>	
VAX only Cluster	QL-0NXA9-AA
Alpha only Cluster	QL-3J1A9-AA
Mixed Cluster	QP-03PAA-01

#### 1.6.2 HSM Capacity Licenses

HSM uses an online capacity licensing strategy. Because HSM increases online capacity for active data at low cost, the license strategy attempts to capitalize on this lower cost per megabyte. HSM reduces the cost of system management by providing this functionality with a reduced amount of operator intervention.

You may increase your HSM storage capacity by purchasing additional capacity licenses. Compaq makes it easy for you by combining a base license in the same capacity license package so only one part number is needed. These licenses expand your shelving capacity by 140 GB, 280 GB, 500 GB, or 1000 GB increments of storage. Table 1-3 lists these licenses.

**Table 1–3 HSM Additional Capacity Licenses**

<b>HSM Capacity Licenses:</b>	
140 GB Capacity License*	QP-03TAA-01
280 GB Capacity License*	QP-03TAA-02
500 GB Capacity License*	QP-03TAA-04
1000 GB Capacity License*	QP-03TAA-03

**Note**

**The \* in the above table means that these additional capacity licenses also include the base license for VAX clusters, Alpha clusters, and mixed-architecture clusters.**



## 1.7 HSM Concurrent Use Licenses

In addition to the HSM Capacity licenses, Compaq also has available some HSM Concurrent Use Licenses. These concurrent use licenses are different from the above capacity licenses in that they don't include a base license in the same package. Obtaining a concurrent use license and a base license requires two part numbers. Table 1-4 lists these licenses.

**Table 1-4 HSM Concurrent Use Licenses**

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<b>Concurrent Use Licenses:</b>	
20 GB Concurrent Use License	QL-2AWAA-3B
500 GB Concurrent Use License	QL-2AWAA-3G
Unlimited Concurrent Use License	QL-2AWAA-3H

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## 1.8 Installation Changes when SLS is Present

When the Storage Library System (SLS) product is already present on the system where you are installing HSM, you must NOT install MDMS. The HSM Product will use the MDMS software already running under SLS. If you reinstall MDMS again, it will override the MDMS software running under SLS and cause SLS to lose some functionality. See the Caution note that follows.

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**Caution**

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**If you currently use the Storage Library System for OpenVMS (SLS), do not install MDMS. MDMS does not contain the backup and restore functionality of SLS. If you install MDMS over SLS backup and restore functionality, you must reinstall your version of SLS. SLS includes the MDMS functionality.**

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## 1.9 HSM Upgrade Considerations

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**Note**

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**If you are installing HSM V3.0 on an Alpha running OpenVMS 7.2 you will be installing the latest HSDRIVER.**

**If you are upgrading from HSM V2.x, (on Alpha/VAX systems running Open VMS versions below 7.2), please note that though the HSDRIVER provided in this kit, is the latest version, you need not reboot your systems after installation in order to run HSM V3.0.**

**Do not run HSM V3.0 with the HSM V1.x driver installed. Doing so may crash your system.**

---

The additional tasks you must perform are described below:

1. All HSM V2.x versions contain an HSDRIVER with a different interface than the HSM V1.x versions. HSM V2.x version will not work with the V1.x version of HSDRIVER installed. So, if you are upgrading from an HSM V1.x version to an HSM V2.x version, you must reboot your system after the HSM installation or the system will crash. If you are operating in a VMScluster™, all nodes in the cluster using HSM must be rebooted to use the new HSDRIVER.

## Welcome to HSM

### 1.10 Backing HSM Up the Catalog

2. If you are upgrading from a lower HSM V2.x version to HSM V3.0, you do not have to reboot your system right after HSM installation. You may operate HSM V3.0 with an older V2.x HSDRIVER. However, you should plan to reboot your system in the near future to take advantage of the full HSDRIVER functionality.
3. The format of the HSM catalog and the SMU databases found in HSM\$MANAGER have changed for HSM Version 3.0 from V1.x. As a result, the installation procedure may convert the existing catalog and multifile save sets to the new format and you cannot downgrade to earlier versions.

In case something should happen during conversion, Compaq strongly recommends you back up the existing catalog and SMU databases before you install HSM Version 3.0 software. The catalog is located at: HSM\$CATALOG:HSM\$CATALOG.SYS and the SMU databases at: HSM\$MANAGER:\*.SMU.

4. You must shut down HSM before you perform the installation. If you do not, the installation will fail. To shut down HSM, use the following command:

```
§ SMU SHUTDOWN/NOW
```

### 1.10 Backing HSM Up the Catalog

Because the HSM catalog is such a critical file for HSM, it is very important that it gets backed up on a regular basis. The contents of shelved files are retrievable only through the catalog. You should therefore plan for the catalog to be in a location where it will get backed up frequently.

### 1.11 Backing up Your System Disk

At the beginning of the installation, VMSINSTAL prompts you about the backup of your system disk. Compaq recommends that you back up your system disk before installing any software.

Use the backup procedures that are established at your site. For details about performing a system disk backup, see the section on the Backup utility (BACKUP) in the OpenVMS System Management Utilities Reference Manual: A-L.

### 1.12 VMScluster™ System Considerations

If you installed HSM on a VMScluster™ system, there are four things you may need to do:

- Reinstall DCLTABLES on all nodes in the VMScluster™ system.
- Make sure that SYS\$STARTUP:HSM\$LOGICALS.COM is the same across all nodes in the VMScluster™ system and that all nodes can access any devices referenced in the logicals.
- Because HSM creates new DCL command verbs, all system users need to log out and log in again to see those verbs.
- To ensure all logicals are correctly defined and that HSM functionality is fully available on all devices in the VMScluster™ system, you may want to reboot all nodes in the VMScluster™ system.

## 1.13 Mixed Architecture Environments

### Before You Install your Storage Management Software

---

Note

---

**If you are planning to install HSM Plus software in a mixed architecture OpenVMS Cluster, you should understand the configuration issues explained in this section. If you do not consider these configuration issues, you could spend considerable time deleting and editing files, and reinstalling the software.**

---

This section addresses the characteristics of a mixed architecture environment and describes some fundamental approaches to installing and configuring your software to run in it.

The following list identifies the topics and their purposes:

- **1.13.1 Mixed Architecture Environments** defines the mixed architecture environment and discusses ways in which they can come about, change, then disappear. Each of these occurrences requires some consideration about how to configure your software.
- **1.13.2 Principles Guiding Mixed Architecture Configuration** lists the guiding principles that require you to make special considerations for mixed architecture implementation, and what these principles mean to you.
- **1.13.3 Configuring Applications in a Mixed Architecture OpenVMS Cluster** describes three possible approaches to implementing a mixed architecture environment.
- **1.13.4 Implementation Specific Approach** explains why the documentation includes procedures for a specific approach. If you cannot use the documented procedures, you should decide on an approach before you begin installation.

### 1.13.1 Mixed Architecture Environments

A mixed architecture OpenVMS Cluster includes at least one VAX system and at least one Alpha system.

#### Creating a Mixed Architecture Configuration:

If you add an Alpha system to a homogenous VAX OpenVMS Cluster, or if you are currently running a homogenous Alpha OpenVMS Cluster and inherit a VAX system, you will have a mixed architecture environment.

Before you integrate the Alpha or VAX node into the system, you should decide an approach to take for handling mixed architecture issues.

#### Operating a Mixed Architecture Configuration:

If you are currently operating a mixed architecture environment, and you want to add a VAX system or an Alpha system you must integrate it into your current configuration consistently with your other applications.

You should understand the particular requirements of any new application you introduce into a mixed architecture OpenVMS Cluster.

## Welcome to HSM

### 1.13 Mixed Architecture Environments

#### Dissolving a Mixed Architecture Configuration:

If you remove the last VAX or Alpha system, leaving a homogenous OpenVMS Cluster, you should remove any aspects of configuration that accounted for the heterogeneous nature of the mixed architecture system. This includes (but is not limited to) removing startup files, duplicate directory structures, and logical tables.

#### 1.13.2 Principles Guiding Mixed Architecture Configuration

##### Hardware Limitations:

VAX systems cannot execute image files compiled on an Alpha system, and Alpha systems cannot execute image files compiled on a VAX system. Other types of files cannot be shared, including object code files (.OBJ), and user interface description files (.UID). You must place files that cannot be shared in different locations: VAX files accessible only to VAX OpenVMS Cluster nodes, and Alpha files accessible only to Alpha OpenVMS Cluster nodes.

##### What it Means

Data files, in most cases, must be shared between OpenVMS Cluster nodes. You should place all shared files in directories accessible by both VAX and Alpha OpenVMS Cluster nodes.

Logical names, that reference files which cannot be shared, or the directories in which they reside, must be defined differently on VAX and Alpha systems.

Files that assign logical name values must therefore be architecture specific. Such files may either reside on node-specific disks or shared only among OpenVMS Cluster nodes of the same hardware architecture.

#### 1.13.3 Configuring Applications in a Mixed Architecture OpenVMS Cluster

This section describes three approaches to configuring applications to run in a mixed architecture OpenVMS Cluster. The one you choose depends on your existing configuration, and the needs of the particular application you are installing. These approaches are given as examples only. You should decide which you want to implement based on your own situation and style of system management.

All of these approaches have two aspects in common:

- All shared files reside in one location
- All files that cannot be shared reside in separate locations

##### 1.13.3.1 Separate Disk Configuration

These characteristics describe the separate disk configuration:

- Product directories are installed on two separate disks.
- One of the product directories is a complete installation containing all data (and other shared) files, and all executable (and other nonshared) files for either VAX or Alpha systems.
- The other of the product directories is a partial product installation, with only those directories that contain either Alpha or VAX system executables and other nonshared files.

- The systems using the disk with the complete installation uses logicals that normally reference the product executables and shared files.
- The systems using the disk with only the nonshared files use normal product logical definitions to point to shared files and directories. System logicals that point to nonshared files are assigned to the specific device, directory and/or file names.

### **1.13.3.2 Separate Root Configuration**

These characteristics describe the separate root configuration:

- Product directories are installed on the same disk, but at different root locations.
- One of the product directories is a complete installation containing all data (and other shared files), and all executable (and other nonshared) files for either VAX or Alpha systems.
- The other of the product directories is a partial product installation, with only those subdirectories that contain either Alpha or VAX system executables and other nonshared files.
- The systems using the directory with the complete installation uses logicals that normally reference the product executables and shared files.
- The systems using the directory with only the nonshared files use normal product logical definitions to point to shared files and directories. System logicals that point to nonshared files are assigned to the specific device, directory and/or file names.

### **1.13.3.3 Separate Subdirectory Configuration**

These characteristics describe the separate directory configuration:

- Product directories are installed on the same disk, and under the same root.
- Any directory which would normally contain the nonshared files (under a single architecture installation) has two subdirectories: one for VAX system nonshared files, and one for Alpha system nonshared files.
- Logicals that reference nonshared files are assigned search list values that point to the directories which holds shared files, and to the architecture specific subdirectories holding nonshared files.

### **1.13.4 Implementation Specific Approach**

This document includes specific procedures for a recommended approach based on current product configuration and the behavior of the installation process with respect to its use of logical definitions during upgrades.

If the recommended approach is inconsistent with the way you currently manage your system, you should decide on a different approach before you begin your installation procedures.

## Welcome to HSM

### 1.14 Overview of the HSM Installation Process

## 1.14 Overview of the HSM Installation Process

The following table provides an overview of the steps involved in the full HSM installation and configuration process. To make sure you go through the installation process properly, you could use the 'Check-Off' column in Table 1–5 HSM Installation and Configuration.

**Table 1–5 HSM Installation and Configuration**

Step	Task	Reference	Check-off
1.	Check for HSM - Required Software, Space and Privileges	3.3 Required Software	
2.	Required for HSM Basic Mode	3.3.1 Required for HSM Basic Mode	
3.	Required for HSM Plus Mode	3.3.2 Required for HSM Plus Mode	
4.	Required for HSM Repack Function	3.3.3 Required for HSM Repack Function	
5.	Required Hardware Disk Space	3.2 Required Hardware Disk Space	
6.	Required System Privileges	3.4 Required System Privileges	
7.	Required System Parameters	3.5 Required System Parameters	
8.	Required for VMSINSTAL	3.6 Required for VMSINSTAL	
9.	Installing DECthreads Images	3.7 Installing DECthreads Images	
10.	Registering your HSM License	3.8 Registering Your HSM License	
11.	Installing the HSM Software	4.1 Installing the HSM Software	
12.	Editing the System Startup and Shutdown Files	4.3 Editing the System Startup and Shutdown Files	
13.	Creating an HSM Catalog	4.4 Creating an HSM Catalog	
14.	Installation Verification Procedure	4.5 Installation Verification Procedure	
15.	Getting Started with HSM	Chapter 5	
16.	MDMS Pre-installation Tasks	2.1 MDMS Pre-installation Tasks	

**Table 1–5 HSM Installation and Configuration**

<b>Step</b>	<b>Task</b>	<b>Reference</b>	<b>Check-off</b>
17.	Installing the MDMS Software	2.2 Installing the MDMS Software	
18.	MDMS Post-installation Tasks	2.3 MDMS Post-installation Tasks	
19.	Graphical User Interface(GUI) Installation	2.4 Graphical User Interface(GUI) Installation	
20.	Running the GUI	2.5 Running the GUI	
21.	Hardware and Software Requirements	2.1.1 Hardware and Software Requirements	
22.	Meet Patch Requirements	2.1.2 Meet Patch Requirements	
23.	Install CMA Shareable Images	2.1.3 Install CMA Shareable Images	
24.	Shutdown Previous Version of MDMS	2.1.4 Shutdown Previous Version of MDMS	
25.	Shutdown Previous Version of MDMS	2.1.5 Register the MDMS License	
26.	Register the MDMS License	2.1.5 Register the MDMS License	
27.	Verify the Node is in the MDMS Database	2.1.6 Verify the Node is in the MDMS Database	
28.	Consider RDF Configuration	2.1.7 Consider RDF Configuration	
29.	Create a Node Object	2.3.1 Create a Node Object	
30.	Provide Automatic Start Up and Shut Down	2.3.2 Provide Automatic Start Up and Shut Down	
31.	Remove SLS/MDMS V2.x Automatic Startup	2.3.3 Remove SLS/MDMS V2.x Automatic Startup	
32.	Configure MDMS	2.3.4 Configure MDMS	
33.	Configure Remote Tape Drives	2.3.5 Configure Remote Tape Drives	

## Welcome to HSM

### 1.14 Overview of the HSM Installation Process

**Table 1–5 HSM Installation and Configuration**

<b>Step</b>	<b>Task</b>	<b>Reference</b>	<b>Check-off</b>
34.	Grant MDMS Rights to Users	2.3.6 Grant MDMS Rights to Users	
35.	Installing the DCL tables on Nodes	2.3.7 Installing the DCL tables on Nodes	
36.	Installation on OpenVMS Alpha V7.1 and 7.2	2.4.2 Installation on OpenVMS Alpha V7.1 and V7.2	
37.	Installation on Intel Windows NT/95/98	2.5.2 Running the GUI on Intel Windows NT/95/98	
38.	Installation on Alpha Windows NT	2.4.4 Installation on Alpha Windows NT	
39.	Running the GUI on OpenVMS Alpha	2.5.1 Running the GUI on OpenVMS Alpha	
40.	Running the GUI on Intel Windows NT/95/98	2.5.2 Running the GUI on Intel Windows NT/95/98	
41.	Running the GUI on Alpha Windows NT	2.5.3 Running the GUI on Alpha Windows NT	



---

## Installing MDMS Software

This chapter explains how to install the Media and Device Management Services (MDMS) Version 3.0 software. The sections in this chapter cover the 3 procedures involved in installing the software, namely:

- pre-installation tasks
- installation
- post-installation tasks

If this is the initial installation of MDMS V3.0 you should install MDMS on a node that is going to be one of your MDMS server nodes.

---

### Note

**You may want to read the MDMS configuration chapters in the guide to operations to make better decisions when installing MDMS.**

---

This version of MDMS installs the system executable files into system specific directories. Because of this, there is no special consideration for mixed architecture OpenVMS cluster system installations. At a minimum, you will install MDMS twice in a mixed architecture OpenVMS Cluster system:

- the first time for the Open VMS VAX nodes
- a second time for the OpenVMS Alpha nodes.

### 2.1 MDMS Pre-installation Tasks

The following table lists out exactly which section describes the particular pre-installation task, to help you ensure that the installation takes place correctly.

Action	Section
Meet hardware and software requirements	Section Section 2.1.1
Meet prerequisite patches requirements	Section Section 2.1.2
Install CMA shareable images	Section Section 2.1.3
Shutdown previous version of MDMS	Section Section 2.1.4
Register the MDMS License	Section Section 2.1.5
Verify the Node is in the MDMS Database	Section Section 2.1.6

## Installing MDMS Software

### 2.1 MDMS Pre-installation Tasks

Action	Section
Consider RDF Configuration	Section Section 2.1.7

#### 2.1.1 Hardware and Software Requirements

MDMS V3.0's free disk space requirements differ during installation (peak utilization) and after installation (net utilization). As a pre-installation step please make sure that the required space is available during and post-installation respectively. Table Section 2-1 shows the different space requirements.

**Table 2-1 Disk Space Requirements**

If you are installing the	Complete Kit	You will need
MDMS V3.0	Yes	131,560 peak blocks during installation 98,964 net blocks after installation (permanent)
	No	4,716 peak blocks during installation 1,156 net blocks after installation (permanent)

The two installation variants are organized, and require disk space as follows:

Variant	Peak Utilization	Net Utilization
Complete kit with all options selected:	131560	98964
<ul style="list-style-type: none"> <li>• OpenVMS MDMS</li> <li>• OpenVMS GUI</li> <li>• Alpha NT GUI</li> <li>• Windows GUI</li> </ul>		
Minimal kit	4716	1156

The files for MDMS are placed in two locations:

- *system disk*: for executables
- *MDMS\$ROOT*: for
  - Command procedures
  - Log files
  - Database files
  - GUI files for all three platforms

#### Note

**If disk space is an issue, it is advisable to place *MDMS\$ROOT*: on a disk other than your system disk because MDMS creates log files that can grow quite large.**

OpenVMS V6.2 is the minimum version of software necessary to run MDMS. OpenVMS V7.1 Alpha is the minimum version of software to run the GUI on.

## 2.1.2 Meet Patch Requirements

Table 2-2 describes the patch requirements for MDMS:

**Table 2–2 Prerequisite Patches**

Component	Operating System	Version	Patch
MDMSSSERVER	OpenVMS Alpha	V6.2	ALPY2K_062
	OpenVMS VAX	V6.2	VAXLIBR06_070
GUI	OpenVMS Alpha	V7.1 to V7.1-H2	ALPBASE02_071
		V7.1 to V7.1-H2	ALPACRT06_071
		V7.1 to V7.1-H2	ALPDCL01_071
		V7.1 to V7.1-H2	ALPSYSA01_071
		V7.1 to V7.1-H2	ALPSYSB02_071
		V7.1 to V7.1-H2	ALPTHREADS_03071
		V7.1-2 ONLY	VMS712_PTHREADS

If the server patches are not installed, you will see the following error while trying to start the server:

```
09-Mar-1999 10:38:16 %MDMS-I-TEXT, "10k Day" patch not installed!
```

### Note

**You can obtain these patches or the latest revision by contacting your Compaq representative. If the patches for the MDMSSSERVER are not installed, the server will not start but you can successfully install MDMS, then install the patches and start the server.**

## 2.1.3 Install CMA Shareable Images

If you are installing MDMS on an OpenVMS V6.2 VAX system, you have to install the following three files:

- SYS\$COMMON:[SYSLIB]CMA\$RTL
- SYS\$COMMON:[SYSLIB]CMA\$OPEN\_RTL
- SYS\$COMMON:[SYSLIB]CMA\$LIB\_SHR

If these images are not installed by default, include the following lines in the SYS\$STARTUP:SYSTARTUP\_VMS.COM:

```
$!
$! Install CMA stuff for MDMS
$!
$ INSTALL = "$INSTALL/COMMAND_MODE"
$ IF .NOT. F$FILE_ATTRIBUTES("SYS$COMMON:[SYSLIB]CMA$RTL.EXE", "KNOWN")
$ THEN -
$   INSTALL ADD SYS$COMMON:[SYSLIB]CMA$RTL
$ ENDF
```

## Installing MDMS Software

### 2.1 MDMS Pre-installation Tasks

```
$ IF .NOT. F$FILE_ATTRIBUTES("SYS$COMMON:[SYSLIB]CMA$OPEN_RTL.EXE", "KNOWN")
$ THEN
$   INSTALL ADD SYS$COMMON:[SYSLIB]CMA$OPEN_RTL
$ ENDIF
$ IF .NOT. F$FILE_ATTRIBUTES("SYS$COMMON:[SYSLIB]CMA$LIB_SHR.EXE", "KNOWN")
$ THEN
$   INSTALL ADD SYS$COMMON:[SYSLIB]CMA$LIB_SHR
$ ENDIF
```

#### 2.1.4 Shutdown Previous Version of MDMS

If you have been running a version of MDMS prior to Version 3.0, you must shut it down using the following command:

```
$ @SLS$SYSTEM:SLS$SHUTDOWN
```

If you are using MDMS V3.0, use the following command to shutdown MDMS:

```
$ @SYS$STARTUP:MDMS$SHUTDOWN
```

#### 2.1.5 Register the MDMS License

As MDMS V 3.0 does not have a separate license, you need one of the following licenses to run MDMS:

- ABS-CLIENT-ALPHA
- ABS-CLIENT-VAX
- ABS-OMT
- ABS-OMT-UPG
- ABS-SERVER-ALPHA
- ABS-SERVER-VAX
- HSM-SERVER
- SLS
- SLS-MGR
- SLS-REMOTE
- SLS-REMOTE-MGR

If you do not have one of these licenses registered, please refer to the section on registering the license for ABS or HSM whichever you are installing.

#### 2.1.6 Verify the Node is in the MDMS Database

If this installation is not the **initial** installation of MDMS V3.0, you need to verify that the node you are installing MDMS on is in the MDMS database. Enter the following command on a node that has MDMS already installed on it and verify that the node you are installing MDMS on is in the database:

```
$ MDMS SHOW NODE node_name_you_are_installing_on
%MDMS-E-NOSUCHOBJECT, specified object does not exist
```

If the node is not in the database, you receive the %MDMS-E-NOSUCHOBJECT error message and you should create the node. See the command reference guide for the qualifiers to use.

## Installing MDMS Software

### 2.2 Installing the MDMS Software

If the node you are adding is an MDMS server node, be sure to use the /DATABASE qualifier. If the node you are creating is to be a database server node, you need to edit all SYS\$STARTUP:MDMS\$SYSTARTUP.COM files in your domain and add this node to the definition of MDMS\$DATABASE\_SERVERS.

If the node is in the database, proceed with preinstallation tasks. The node may have been created when you converted from SLS/MDMS V2.x.

---

#### Note

---

**If this is the initial installation, you cannot create a node in the database. You will create the node during the post-installation.**

---

#### 2.1.7 Consider RDF Configuration

MDMS provides RDF software to facilitate operations that require access to remote, network connected tape drives. This allows you to copy data from a local site to a remote site, or copy data from a remote site to a local site.

During the installation you will be asked questions on whether you want to install on this node, the software that will allow it to act as a server and/or client for the RDF software. You need to decide if you want the server and/or client installed on the node.

- Install the **RDF Server software** on all nodes that are connected to the tape drives used for remote operations.
- Install the **RDF Client software** on all nodes that initiate remote operations to tape drives on the RDF Server node.

---

#### Note

---

**After installing RDF you may have to reboot your system. A new driver is included with this kit. If you have never installed RDF before a reboot is not needed. If you already have RDF installed, you do not need to reboot unless you need the new driver installed. It will be installed on the next reboot.**

---

## 2.2 Installing the MDMS Software

The MDMS installation procedure consists of a series of questions and informational messages. Once you start the installation procedure, it presents you with a variety of questions that will change depending on whether the installation is the first or a subsequent installation. The installation procedure provides detailed information about the decisions you will make.

If for any reason you need to abort the installation procedure at any time, you can press CTRL/Y and the installation procedure deletes all files it has created up to that point and exits. Note that you can restart the installation procedure from this point, at any time.

---

#### Note

---

**Be sure to read Section 2.4 for information on selecting GUI kits to be extracted from the saveset during this installation.**

---

To install MDMS:

## Installing MDMS Software

### 2.3 MDMS Post-installation Tasks

1. load the distribution medium into a suitable device, and mount the volume
2. invoke the VMSINSTAL procedure using the following command:

```
$ @SYS$UPDATE:VMSINSTAL MDMS030 location: OPTIONS N
```

Where:

**location:** is the device and directory that contains the software kit save set.

**OPTIONS:** N is an optional parameter that indicates you want to see the question on Release Notes. If you do not include the OPTIONS:N parameter, VMSINSTAL does not ask you about the Release Notes. You should review the Release Notes before proceeding with the installation in case they contain additional information about the installation procedure.

Follow the instructions as you are prompted to complete the installation. Each question you are asked is provided with alternatives for the decision you can take and an explanation for the related decision.

Questions and decisions offered by the installation procedure vary. Subsequent installations will not prompt you for information you provided during the first installation.

### 2.3 MDMS Post-installation Tasks

The following sections describe the post-installation tasks needed after installing the MDMS:

Action	Section
Create a Node Object	Section Section 2.3.1
Provide Automatic Start Up and Shut Down	Section Section 2.3.2
Remove SLS/MDMS V2.x Automatic Startup	Section Section 2.3.3
Configure MDMS	Section Section 2.3.4
Configure remote tape drives	Section Section 2.3.5
Grant MDMS Rights to Users	Section Section 2.3.6
Installing the DCL tables on Nodes	Section Section 2.3.7

#### 2.3.1 Create a Node Object

If this is the initial installation of MDMS, you need to create the node object in the MDMS node database for this node. Use the MDMS CREATE NODE command to create this initial database node. Refer to the command reference guide for the qualifiers for this command. The following is an example:

```
$ MDMS CREATE NODE NABORS -  
! NABORS is the DECnet Phase IV node name or a  
! name you make up if you do not use DECnet  
! Phase IV in your network  
/DATABASE_SERVER -  
! a potential database node  
! must also be defined in  
! in SYS$STARTUP:MDMS$SYSTARTUP.COM  
/TCPIP_FULLNAME=NABORS.SITE.INC.COM -  
! the TCP/IP full node name if you
```

```
! are using TCP/IP you need this if
! you are using the GUI
/DECNET_FULLNAME=INC:.SITE.NABORS -
! this is the full DECnet Phase V node name
! do not define if you do not have DECnet Phase V on this node
! be sure to define if you have DECnet Phase V installed on this node
/TRANSPORT=(DECNET,TCPIP)
! describes the transports that listeners are
! started up on
```

### 2.3.2 Provide Automatic Start Up and Shut Down

To automatically start MDMS when you initiate a system start up, at a location after the DECnet or TCP/IP start up command, add the following line in the system's start up file, SYSS\$MANAGER:SYSTARTUP\_VMS.COM:

```
$ @SYS$STARTUP:MDMS$STARTUP
```

To automatically stop MDMS when you initiate a system shut down, enter the following into the system's shut down file:

```
$ @SYS$STARTUP:MDMS$SHUTDOWN
```

While using MDMS V3.0 with ABS, make sure that MDMS startup is executed prior to ABS startup. ABS needs a logical name that is defined by the MDMS startup.

### 2.3.3 Remove SLS/MDMS V2.x Automatic Startup

If you have been using SLS/MDMS V2.x before and all your nodes running ABS and/or HSM version now support the new MDMS V3.0 make sure you remove this line from your system's start up file:

```
$ @SYS$STARTUP:SLS$STARTUP
```

If this node still needs to support clients that use SLS/MDMS V2.x refer to the Appendix **SLS/MDMS V2.x Compatibility** in the guide to operations. Until you have made all of the changes described in this appendix, you should not start up SLS/MDMS V2.x.

---

**Note**

---

**You must have performed the conversion procedure as described in Section Section 2.3.4 before editing the TAPESTART.COM file.**

---

### 2.3.4 Configure MDMS

Now that you have installed MDMS you need to configure MDMS by creating the following objects:

- Media types
- Locations
- Nodes
- Groups
- Jukeboxes

## Installing MDMS Software

### 2.3 MDMS Post-installation Tasks

- Tape Drives
- Magazines
- Pools
- Volumes

Please refer to the MDMS section in the guide to operations for more information on configuration and operation.

If you upgrading from SLS/MDMS V2.x you can convert the SLS/MDMS V2.x symbols and database to the MDMS V3.0 database. Use the procedure described in the appendix of the guide to operations.

Once MDMS V3.0 is installed, and any conversions are performed, you may wish to adjust your configuration prior to performing MDMS operations

#### 2.3.5 Configure Remote Tape Drives

If you installed the RDF software, you need to configure the remote tape drives.

For each tape drive served with RDF Server software, make sure there is a drive object record in the MDMS database that describes it. Refer to the chapters on MDMS configuration in the guide to operations and the MDMS CREATE DRIVE command in the command reference guide.

For each node connected to the tape drive, edit the file TTI\_RDEV:CONFIG\_node.DAT and make sure that all tape drives are represented in the file. The syntax for representing tape drives is given in the file.

During startup of MDMS, the RDF client and server are also started. The RDF images are linked on your system. If you see the following link errors on Alpha V6.2, this is not an RDF bug. The problem is caused by installed VMS patches ALPCOMPAT\_062 and ALPCLUSIO01\_062.

```
%LINK-I-DATMISMCH, creation date of 11-FEB-1997 15:16 in
shareable image SYS$COMMON:[SYSLIB]DISMNTSHR.EXE;3
differs from date of 4-MAY-1995 22:33 in shareable image library
SYS$COMMON:[SYSLIB]IMAGELIB.OLB;1
.
.
.
```

This is a known problem and is documented in TIMA. To correct the problem, issue the following DCL commands:

```
$ LIBRARY/REPLACE/SHARE SYS$LIBRARY:IMAGELIB.OLB SYS$SHARE:DISMNTSHR.EXE
$ LIBRARY/REPLACE/SHARE SYS$LIBRARY:IMAGELIB.OLB SYS$SHARE:INIT$SHR.EXE
$ LIBRARY/REPLACE/SHARE SYS$LIBRARY:IMAGELIB.OLB SYS$SHARE:MOUNTSHR.EXE
```

#### 2.3.6 Grant MDMS Rights to Users

Before any user can use MDMS, you must grant MDMS rights to those users. Refer to the MDMS Rights and Privileges Appendix in the Archive/Backup System for OpenVMS Command Reference Guide for explanation of MDMS rights and how to assign them.



### 2.3.7 Installing the DCL Tables on Nodes

To make MDMS commands available on all nodes of the cluster, you should ensure that all nodes have the latest version of DCLTABLES.EXE installed. You can do this by using SYSMAN or by logging into each node in the cluster and enter the following command:

```
$ INSTALL REPLACE SYS$COMMON:[SYSLIB]DCLTABLES.EXE
```

## 2.4 Graphical User Interface(GUI) Installation

This section describes how to install and run the Graphical User Interface (GUI) on various platforms.

As the GUI is based on Java, you must have the Java virtual machine installed on the system you run the MDMS GUI on. If you do not have Java installed on your system, these sections describe what is needed and where to get it.

This installation procedure extracts files from the MDMS kit and places them in MDMS\$ROOT:[GUI...]. You can then move the files to your Windows system and install them.

---

**Note**

---

**For the GUI to communicate with the MDMS server, you must have TCP/IP services on the node where you have the MDMS server running. After installation be sure to refer to Section 2.4 to run the GUI.**

---

### 2.4.1 Requirements

The GUI requires the following in order to run:

**Virtual Machine** – Since the MDMS GUI is a Java application, it requires the platform specific Java Virtual Machine. The availability of each Java Virtual Machine is described in the following sections. The best way of getting a Java Virtual Machine is to download the platform-specific kit from the given URLs. If this is not possible, the MDMS package also contains a copy for your convenience. Issues concerning availability and installation of the Java Virtual Machine can be directed to:

```
http://www.sun.com/java/products for Windows NT and  
http://www.digital.com/java/download/jdk_ovms/1.1.8/index.html for OpenVMS
```

A Java Virtual Machine is included in this MDMS kit for the purpose of completeness. MDMS provides both the pointers (URLs) of downloading a Java Virtual Machine and the actual files of the Java Virtual Machine in the release package. However, the downloading approach is encouraged.

Memory - The hard drive space requirement is 6 MB for Java Virtual Machine and 2 MB for MDMS GUI. The main memory space requirement for running MDMS GUI is 10 MB.

### 2.4.2 Installation on OpenVMS Alpha V7.1 and V7.2

The following steps describe how to install and run the MDMS GUI on OpenVMS Alpha:

1. If you are installing the GUI on OpenVMS Alpha V7.1, then the following patches (or their latest equivalent) need to be installed on the system. Please contact your Compaq representative for obtaining these patches.

## Installing MDMS Software

### 2.4 Graphical User Interface(GUI) Installation

**Table 2–3 Patches Required for OpenVMS V7.1 for JAVA**

Patch Required	For OpenVMS Version	Fix Description
ALPBASE02_071	V7.1 to V7.1-H2	Fixes needed to enable ALPACRT06_071 and ALPSYSA01_071. <b>Must be installed first.</b>
ALPACRT06_071	V7.1 to V7.1-H2	DECC fixes-fork, exec
ALPDCL01_071	V7.1 to V7.1-H2	Fixes for multiple kernel threading problem
ALPSYSA01_071	V7.1 to V7.1-H2	Higher-priority thread blocking
ALPSYSB02_071	V7.1 to V7.1-H2	IEEE arithmetic
ALPTHREADS_03071	V7.1 to V7.1-H2	DECthreads; support for Java, selected fixes
VMS712_PTHREADS	V7.1-2 ONLY	DECthreads; support for Java, selected fixes

These patches are not required for installation on OpenVMS Alpha V7.2.

2. Extract the files for the OpenVMS Java Virtual Machine.

You may use the Java kit provided with the MDMS kit or download files from the Web. If you want to install from the MDMS kit, answer YES to the following question:

```
Do you want the OpenVMS Java kit extracted [NO]?
```

If you install from the MDMS kit, a file called:

```
MDMS$ROOT:[GUI.VMS]DEC-AXPVMS-JAVA-V0101-81-1.PCSI_DCX_AXPEXE
```

is created. Use this file to install Java as in step 4.

3. In the MDMS installation, the following question is asked.

```
Do you want the MDMS GUI installed on Alpha OpenVMS [YES]?
```

Reply 'Yes' to the question if you want to install the GUI on OpenVMS. Files will be moved to MDMS\$ROOT:[GUI.VMS] and the GUI installation will be completed.

4. Following the MDMS installation, you should install Java by first extracting the PCSI file for the Java installation using the following commands:

```
$ SET DEFAULT MDMS$ROOT:[GUI.VMS]
$ RUN DEC-AXPVMS-JAVA-V0101-81-1.PCSI_DCX_AXPEXE
```

Extract and read the Release Notes for additional information on how to use this product in an OpenVMS environment:

```
$ PRODUCT EXTRACT RELEASE_NOTES JAVA-
/SOURCE=[directory_where_you_put_the_PCSI_file]-
/FILE=[directory_where_you_want_it]JDK118_VMS_RELEASE_NOTES.HTML-
/BASE_SYSTEM=AXPVMS
```

Install the JDK1.1.8 from the .PCSI file obtained:

```
$ PRODUCT INSTALL JAVA-
/SOURCE=[directory_where_you_put_the_PCSI_file]/BASE_SYSTEM=AXPVMS
```

## Installing MDMS Software

### 2.4 Graphical User Interface(GUI) Installation

The following files are installed by PCSI (POLYCENTER Software Installation utility) with file attribute of ARCHIVE:

```
SYSS$MANAGER:JAVA$SETUP.COM
SYSS$MANAGER:JAVA$STARTUP.COM
SYSS$SYSROOT:[JAVA.LIB]FONT.PROPERTIES
SYSS$SYSROOT:[JAVA.LIB]FONT_PROPERTIES.JA
```

If a file having any of these names already exists on the system, the installation process renames it to a new name with the file type ending ‘**\_OLD**’, before loading the new copy from the kit. Only the latest version of the existing file is preserved (by being renamed to file.type\_old) before PCSI deletes all remaining versions.

For example, an existing SYSS\$MANAGER:JAVA\$SETUP.COM is renamed to SYSS\$MANAGER:JAVA\$SETUP.COM\_OLD before the new copy is copied from the kit. If you have previously personalized any of these files, you might need to merge your personalizations with the new copy.

The JDK documentation is installed on your system at the following location:

```
SYSS$COMMON:[SYSHLP.JAVA]INDEX.HTML
```

5. After installation you must do the following:

```
$ EDIT SYSS$STARTUP:JAVA$SETUP.COM
```

and include the following logical name definition at the end of the file:

```
$ DEFINE JAVA$CLASSPATH -
MDMS$ROOT:[GUI.VMS]MDMS.ZIP,-
MDMS$ROOT:[GUI.VMS]SYMANTEC.ZIP, -
MDMS$ROOT:[GUI.VMS]SWINGALL.JAR, -

SYSS$COMMON:[JAVA.LIB]JDK118_CLASSES.ZIP
```

6. Run JAVA\$SETUP.COM to establish defaults for the logical names CLASSPATH and JAVA\$FILENAME\_CONTROLS, and to define symbols that determine whether Java will interpret commands as either foreign commands or DCL commands:

```
$ @SYSS$MANAGER:JAVA$SETUP.COM
```

Add the above command line to SYSS\$COMMON:[SYSMGR]SYLOGIN.COM so that when users login, they will have the Java definitions.

---

#### Note

**Make sure that the logical JAVA\$USE\_DCL is not defined or the GUI will not work.**

---

7. The JAVA\$SETUP.COM procedure calls:

```
SYSS$SYSROOT:[SYSHLP.JAVA]JAVA$FILENAME_CONTROLS.COM
```

to establish the JAVA\$FILENAME\_CONTROLS default values. You can edit this file to see what defaults are being used and how to change them. (This information is also in the "UNIX Style Filenames on an OpenVMS System" section of the JDK release notes.)

8. Rename the file SYSS\$COMMON:[JAVA.LIB]FONT.PROPERTIES to another name. This file remaps the fonts and makes the MDMS GUI appear incorrect. Renaming the file to

## Installing MDMS Software

### 2.4 Graphical User Interface(GUI) Installation

another name will cause Java to use the default fonts, which are necessary to run the MDMS GUI.

9. If you are running the GUI using a non-PC keyboard, for example an OpenVMS keyboard, issue the following command on the system running the GUI:

```
$mcr decw$utils:xmodmap -e "keysym Delete = BackSpace Delete"
```

#### 2.4.3 Installation on Intel Windows NT/95/98

The following describes how to install the MDMS GUI on Intel platforms running Windows NT/95/98:

1. In the MDMS installation, the following question is asked.

```
Do you want files extracted for Microsoft Windows NT/95/98 on Intel [YES]?
```

Reply YES if you want to install the GUI on Intel Windows NT/95/98.

2. Install the Java Virtual Machine - If Java Virtual Machine is not already installed on your PC, download JRE 1.1.8 from:

```
http://www.javasoft.com/products/jdk/1.1/jre or  
http://www.sun.com/developers/developers.html
```

and follow the instructions to perform a default installation. You may use other versions of JRE, preferably 1.1.8 or later. If a Java Virtual Machine is not available, you may use MDMS\$ROOT:[GUI.INTEL]JRE117WINTEL.EXE.

Simply double-click on this file to install Java, and follow the setup instructions.

3. Install the MDMS GUI:

Make MDMS\$ROOT:[GUI.INTEL]SETUP\_INTEL.EXE available to the target machine (Intel PC running Windows NT/95/98)

Run SETUP\_INTEL.EXE on the target machine.

#### 2.4.4 Installation on Alpha Windows NT

The following describes how to install the MDMS GUI on an Alpha platform running Windows NT:

1. In the MDMS installation, the following question is asked. Reply YES if you want to install the GUI on Alpha NT.

```
Do you want the MDMS GUI files extracted for Alpha NT [YES] ?
```

2. Install the Java Virtual Machine - If Java Virtual Machine is not already installed on your Alpha, download JRE 1.1.8 from:

```
http://www.digital.com/java/download/jre_nt/1.1.8/jre118_down.html
```

and follow the instruction to perform a default installation. If a Java Virtual Machine is not available, you may use:

```
MDMS$ROOT:[GUI.ALPHA_NT]JRE118ALPHANT.EXE.
```

3. Install FX!32 if not installed and make sure FX!32 is enabled.

4. Install the MDMS GUI:
  - Make MDMS\$ROOT:[GUI.ALPHA\_NT]SETUP\_ALPHA\_NT.EXE available to the target machine (Alpha PC running Windows NT)
  - Run SETUP\_ALPHA\_NT.EXE on the target machine.
  - If the 'Unzip To' folder has been modified to anything other than default directory, remember to modify the MDMS\_GUI.BAT.

## 2.5 Running the GUI

Now that you have installed the GUI, you have to make sure the server node is configured to accept communications from the GUI. The server node for the GUI must have:

- TCP/IP enabled  
and
- the MDMS rights enabled in the SYSUAF record for the user

To enable TCP/IP communications on the server, you have to set the *TCP/IP Fullname* attribute and enable the TCPIP transport. See the command reference guide for information about setting these attributes in a node.

MDMS rights for the user must be enabled in the SYSUAF record to log into the server using the GUI. Refer to the command reference guide for information about MDMS rights.

The following sections describe how to run the GUI on various platforms.

### 2.5.1 Running the GUI on OpenVMS Alpha

To use the MDMS GUI on OpenVMS Alpha systems, use the following commands:

```
$ @SYS$STARTUP:JAVA$SETUP.COM
$ SET DISPLAY/CREATE/NODE=node_name/TRANSPORT=transport
$ MDMS/INTERFACE=GUI
```

For the SET DISPLAY command, the node\_name is the name of the node on which the monitor screen exists. This allows you to use the GUI on systems other than those running OpenVMS Alpha V7.1 or higher. The transport must be a keyword of:

- LOCAL – if you are running the GUI on the same node as the monitor
- DECNET – if you are running the GUI on a monitor connected to another node and you wish to use DECnet protocol between the monitor node and the GUI Java node.
- TCPIP – if you are running the GUI on a monitor connected to another node and you wish to use TCPIP protocol between the monitor node and the GUI Java node.

### 2.5.2 Running the GUI on Intel Windows NT/95/98

To use the MDMS GUI on Intel Windows NT/95/98 platforms, double click MDMS\_GUI\MDMS\_GUI.BAT.

## Installing MDMS Software

### 2.5 Running the GUI

#### 2.5.3 Running the GUI on Alpha Windows NT

To use the MDMS GUI on Alpha Windows NT, do one the following:

1. If both the Java Virtual Machine and the MDMS GUI were installed with default selection, then double click MDMS\_GUI\MDMS\_GUI.BAT
2. Otherwise in MDMS\_GUI\MDMS\_GUI.bat, replace the Java Virtual Machine directory and MDMS\_GUI directory as necessary, double click MDMS\_GUI\MDMS\_GUI.BAT.

---

## Meeting the HSM Installation Requirements

This chapter enlists requirements to be met before installing the HSM software. Go through the following list before you begin installation.

### Requirements List

The requirements list to meet before installing HSM software is as follows:

- Read the HSM Software Release Notes
- Required Software
- Requirements for HSM Basic Mode
- Requirements for HSM Plus Mode
- Requirements for HSM Repack Function
- Required Hardware Disk Space
- Required System Privileges
- Required System Parameters
- Required for VMSINSTAL
- Installing DECthreads™ Images
- Registering your HSM Licence

### 3.1 Read the Release Notes

The HSM kit includes online release notes. Compaq strongly recommends that you read the release notes before proceeding with the installation. The release notes are in a text file named `SYS$HELP:HSM30.RELEASE_NOTES` and a Postscript ® file named `SYS$HELP:HSM30_RELEASE_NOTES.PS`.

### 3.2 Required Hardware Disk Space

Table 3–1 summarizes the disk space requirements for installing and running HSM.

**Table 3–1 Disk Space Requirements**

Item	Blocks Needed	Description
Install	28,000	Temporary blocks for Kit

## Meeting the HSM Installation Requirements

### 3.3 Required Software

Table 3–1 Disk Space Requirements

Item	Blocks Needed	Description
HSM Software	16,000	Permanent blocks for software
Catalog	100,000	Catalog grows at the average rate of 1.25 blocks for each file copy shelved. Compaq recommends 100,000 blocks be set aside initially for this catalog.

HSM requires 16,000 free disk blocks on the system disk. To determine the number of free disk blocks on the current system disk, enter the following command at the DCL prompt:

```
$ SHOW DEVICE SYS$SYSDEVICE
```

### 3.3 Required Software

The software requirements list for HSM is as follows:

- HSM V3.0 is supported on the OpenVMS Alpha V6.2, V7.1, V7.2, and V7.2-1, and OpenVMS VAX Operating System V6.2, V7.1, and V7.2. HSM V3.0 does not support ODS5 disk volumes.
- HSM Basic Mode does not require any software other than HSM and the OpenVMS Operating System.
- HSM Plus Mode requires MDMS V2.5B or newer software, or SLS V2.5B or newer software. However, you should use the latest version of MDMS or SLS (V2.9) to take advantage of the latest enhancements and device support. An MDMS license is not required for using HSM. An SLS license is required only if SLS is to be used independently of HSM.

#### 3.3.1 Required for HSM Basic Mode

When HSM is used in Basic Mode, the only software required, in addition to HSM, is the OpenVMS Operating System Versions 6.2 through 7.2 - see above. Media and Device Management Services (MDMS) is required only if you wish to convert from HSM Basic Mode to HSM Plus Mode.

#### 3.3.2 Required for HSM Plus Mode

HSM Plus mode requires the use of Media and Device Management Services for OpenVMS (MDMS) Version 2.5B or newer software for managing media and devices. MDMS software comes packaged with HSM and can be obtained from one of the following sources:

- Off the HSM distribution kit
- Included with Storage Management Library System for OpenVMS (SLS).
- Included as a separate source with Archive/Backup System for OpenVMS (ABS) or Sequential Media File system for OpenVMS (SMF) software

---

**Note**

**MDMS software must be installed before you install HSM in Plus mode, unless SLS is already present on the system. If SLS is present, do not install MDMS since HSM will**



use the SLS version of MDMS. MDMS is not required for operating in HSM Basic mode.

---

### 3.3.3 Required for HSM Repack Function

The HSM SMU REPACK Command allows you to do an analysis of valid and obsolete data on shelf media and copy the valid data to other media, thus freeing up storage space. This Repack functionality is found in HSM Plus Mode.

The HSM Repack function requires the use of two tape drives since this is a direct tape to tape transfer process. One tape must match the media type of the source archive class and the other tape must match the media type of the destination archive class.

## 3.4 Required System Privileges

To install HSM software, you must be logged into an account that has the SETPRV privilege. Note that VMSINSTAL turns off the BYPASS privilege at the start of the installation.

## 3.5 Required System Parameters

The installation for HSM may require that you raise the values of the GBLSECTIONS and GBLPAGES system parameters if they do not meet the minimum criteria shown in Table 3–2.

**Table 3–2 System Parameters for VAX and ALPHA**

System Parameters	VAX	ALPHA
Additional GBLPAGES	1783	2926
Additional GBLSECTIONS	6	36

To find your current system parameters, use the following command:

```
$ MCR SYSGEN
SYSGEN> SHOW GBLPAGES
SYSGEN> SHOW GBLSECTIONS
```

## 3.6 Required for VMSINSTAL

When you invoke VMSINSTAL, it checks for the following:

- Whether you are logged into a privileged account
- Whether you have adequate quotas for installation
- Whether DECnet™ software is running
- Whether any users are logged into the system

Note that VMSINSTAL requires that the installation account have a minimum of the following quotas:

```
ASTLM = 40 (AST Quota)
BIOLM = 40 (Buffered I/O limit)
BYTLM = 32,768 (Buffered I/O byte count quota)
DIOLM = 40 (Direct I/O limit)
```

## Meeting the HSM Installation Requirements

### 3.7 Installing DECthreads™ Images

```
ENQLM = 200 (Enqueue quota)
FILLM = 300 (Open file quota)
```

Type the following command to find out where your quotas are set.

```
$ show process/quota
```

If VMSINSTAL detects any problems during the installation, it notifies you and prompts you to continue or stop the installation. In some instances, you can enter YES to continue. Enter NO to stop the installation and correct the problem.

User account quotas are stored in the SYSUAF.DAT file. Use the OpenVMS Authorize Utility (AUTHORIZE) to verify and change user account quotas.

First set your directory to SYS\$SYSTEM, and then run AUTHORIZE, as shown in the following example:

```
$ SET DEFAULT SYS$SYSTEM
$ RUN AUTHORIZE UAF>
```

At the UAF> prompt, enter the SHOW command with an account name to check a particular account. For example:

```
UAF> SHOW SMITH
```

To change a quota, enter the MODIFY command. The following example changes the FILLM quota for the SMITH account and then exits from the utility:

```
UAF> MODIFY SMITH /FILLM=50
UAF> EXIT
```

After you exit from the utility, the system displays messages indicating whether changes were made. Once the changes have been made, you must log out and log in again for the new quotas to take effect.

## 3.7 Installing DECthreads™ Images

If DECthreads™ images are not installed, you must install them before you install HSM. DECthreads™ consists of several images. To check for them, you will need to execute the following commands. These commands require CMKRNL privileges and will need to be executed on all nodes in the cluster running HSM.

```
$ install list sys$library:cma$rtl.exe
$ install list sys$library:cma$lib_shr.exe
$ install list sys$library:cma$open_lib_shr.exe
$ install list sys$library:cma$open_rtl.exe
```

If any of these list commands fails, then the DECthreads™ images need to be installed. To install them, execute the following commands.

```
$ install add sys$library:cma$rtl.exe/open/head/share
$ install add sys$library:cma$lib_shr.exe/open/head/share
$ install add sys$library:cma$open_lib_shr.exe/open/head/share
$ install add sys$library:cma$open_rtl.exe/open/head/share
```

## 3.8 Registering Your HSM License

To register your HSM license or to add additional capacity licenses, follow the steps in Table 3–3. Before you attempt to register your PAK, be sure to have the PAK information in front of you.

**Table 3–3 How to Register Your HSM License**

Step	Action
1.	Enter the LICENSE REGISTER command with the product name and a dash. <pre>\$ LICENSE REGISTER HSM-SERVER -</pre>
	<b>Important:</b> Enter a dash at the end of each command in steps 1 through 8.
2.	Enter the /ISSUER qualifier information, assigning the value DEC between quotation marks. <pre>_\$ /ISSUER="DEC" -</pre>
3.	Enter the /AUTHORIZATION qualifier information, assigning it the value from the AUTHORIZATION NUMBER entry of the PAK. <pre>_\$ /AUTHORIZATION=xxxxxxx -</pre>
4.	Enter the /PRODUCER qualifier information, assigning the value DEC in quotes. <pre>_\$ /PRODUCER="DEC" -</pre>
5.	Enter the /UNITS qualifier information, assigning the value from the UNITS entry of the PAK. This is the value that determines your HSM online capacity. <pre>_\$ /UNITS=nn -</pre>
6.	Enter the /DATE qualifiers information, assigning the product's release date value from the PRODUCT RELEASE DATE entry of the PAK. <pre>_\$ /DATE=dd-mmm-yyyy -</pre>
7.	Enter the /AVAILABILITY qualifier information, assigning the value from the AVAILABILITY TABLE CODE entry of the PAK. <pre>_\$ /AVAILABILITY=x -</pre>
8.	Enter the / OPTIONS qualifier information, assigning the value from the KEY OPTIONS entry of the PAK. <pre>_\$ /OPTIONS=xxxxxx -</pre>
9.	Enter the /CHECKSUM qualifier information, assigning the value from the CH entry of the PAK. <b>Important:Do NOT end the entry with a dash.</b> <pre>_\$ /CHECKSUM=n-xxxx-xxxx-xxxx-xxxx</pre>
10.	Invoke the LICENSE LOAD command with the product name. <pre>\$_LICENSE_LOAD_HSM-SERVER</pre>

**Meeting the HSM Installation Requirements**  
**3.8 Registering Your HSM License**

---

## Installing HSM Software

This chapter contains instructions for installing HSM Version 3.0 software on the OpenVMS operating system.

### 4.1 Installing the HSM Software

This section contains a step-by-step description of the installation procedure.

Installing HSM will take approximately 10 to 20 minutes, depending on your system configuration and media.

Running the Installation Verification Procedure (IVP) on a standalone system takes about 5 minutes.

#### 4.1.1 The Installation Procedure

The HSM installation procedure consists of a series of questions and informational messages. Table 4–1 shows the installation procedure. For a complete example of an HSM installation and verification procedure for HSM Basic mode, see Appendix A; for HSM Plus mode, see Appendix B.

To abort the installation procedure at any time, enter Ctrl/Y. When you enter Ctrl/Y, the installation procedure deletes all files it has created up to that point and exits. You can then start the installation again.

**Table 4–1 How to Install the HSM Software**

Step	Action
1	Load and mount the media that contains the software kit.
2	Invoke the VMSINSTAL procedure. Use the following command: <pre> \$@SYS\$UPDATE:VMSINSTAL HSM022 location: OPTIONS N </pre> <p><u>Where:</u>  location is the tape device (or directory) that contains the software kit save set.  <i>OPTIONS N</i> is an optional parameter that tells VMSINSTAL to ask you to choose Release Notes options. The default behavior is to move the Release Notes to SYSSHELP.</p>
3	If you see the following message: <pre> %VMSINSTAL-W- ACTIVE, The following processes are still active* Do you want to continue anyway [NO]? </pre> <p>Enter <b>Y</b> and press &lt;Return&gt;, else go to step 4.</p>

---

## Installing HSM Software

### 4.1 Installing the HSM Software

Table 4–1 How to Install the HSM Software

Step	Action
4	<p>Confirm the state of the system backup.</p> <p>* Are you satisfied with the backup of your system disk [Yes]?</p> <p>Press &lt;Return&gt;.</p>
5	<p>Identify the location for the software to be mounted. * Where will the distribution volumes be mounted: You may specify a tape drive, a local disk, or a remote disk. Enter the appropriate information and press &lt;Return&gt;.</p>
6	<p>If you entered OPTIONS N on the VMSINSTAL command line, respond to the Release Notes option.</p> <p>Release notes included with this kit are always copied to SYS\$HELP. Additional Release Notes Options:</p> <ol style="list-style-type: none"><li>1. Display release notes</li><li>2. Print release notes</li><li>3. Both 1 and 2</li><li>4. None of the above</li></ol> <p>* Select option [2]:</p> <p>Enter the number of the desired option and press &lt;Return&gt;.</p>
7	<p>Answer if you want to purge old files.</p> <p>* Do you want to purge files replaced by this installation [YES]?</p> <p>Enter Y and press &lt;Return&gt;.</p>
8	<p>Select to run the Installation Verification Procedure (IVP).</p> <p>* Do you want to run the IVP after the installation [YES]?</p> <p>Recommendation: Running the IVP procedure is recommended. Press &lt;Return&gt; to run the IVP, else enter No and press &lt;Return&gt;.</p>
9	<p>Confirm the PAK registration</p> <p>. *** HSM License *** Correct installation and operation of this software requires that one of the following Product Authorization Keys (PAKs) reflecting your software license be present on this system: HSM-SERVER HSM-USER</p> <p>* Does this product have an authorization key registered and loaded [Y]?</p> <p>Enter Y and press &lt;Return&gt;</p>

**Table 4–1 How to Install the HSM Software**

Step	Action
10	<p>Determine whether to install HSM Basic or HSM Plus mode.</p> <p style="text-align: center;">*** HSM Mode ***</p> <p>With this version, HSM can operate in one of two possible modes: BASIC - The standalone HSM product which supports a limited number of nearline and offline devices. PLUS - The integrated HSM product, integrated with Media and Device Management Services (MDMS) which supports an expanded number of nearline and offline devices.</p> <p>NOTE: MDMS or SLS V2.5B or newer must be installed before installing HSM PLUS mode. Also, once files are shelved in PLUS mode, you may <i>*not*</i> change back to BASIC mode.</p> <p>Enter BASIC or PLUS to select the mode in which you want HSM to operate. * Enter the mode to install [PLUS]:</p> <p>The default shown varies according to whether the HSM install detects the presence of MDMS or SLS Version 2.5B or newer software on your system. If it does, the default is Plus mode; if it does not, the default is Basic mode. If you tell HSM to install HSM Plus mode, but MDMS or SLS software is not installed on your system, the installation fails.</p>
11	<p>Identify the HSM manager account UIC. If you see the following message:</p> <p style="text-align: center;">*** HSM Account ***</p> <p>A privileged account named HSM\$SERVER will be created for use by HSM processes. This account will not allow interactive log-ins and the password will be automatically generated.</p> <p>The installation procedure will not proceed until you enter a valid user identification code (UIC) for the HSM\$SERVER account.</p> <p>The UIC must be unique and within the SYSTEM group.</p> <p>* Enter the UIC to be used for HSM\$SERVER account [[1,22]]:</p> <p>Press &lt;Return&gt;</p>

## Installing HSM Software

### 4.1 Installing the HSM Software

Table 4–1 How to Install the HSM Software

Step	Action
12	<p>Select a location for the HSM configuration databases and log files.</p> <p><u>Restriction:</u> The location must have at least 100,000 (100K) free blocks and be available to all nodes in the VMScluster™ system that will use HSM.</p> <p style="text-align: center;">*** HSM Device ***</p> <p>You will now be asked to enter a disk device specification to be used as a repository for HSM configuration databases and log files.</p> <p>NOTE: *** This device must have at least 100000 free blocks and be available to all nodes in the cluster that will be running HSM ***</p> <p>* Enter the disk device to use for HSM files [SYSS\$SYSDEVICE]:</p> <p>The default location for HSM files is SYSS\$SYSDVICE:[HSM\$SERVER].</p> <p>VMSINSTAL prompts you to verify the file location before continuing.</p>
13	<p>Set quotas and flags for the HSM account. VMSINSTAL will automatically set quotas and flags for the account.</p>
14	<p>Create HSM catalog and databases. HSM requires a catalog and databases to run. The VMSINSTAL can create them upon completion of the software installation for you.</p> <p><u>Recommendation:</u> Compaq recommends you answer <b>Y</b> to the following question:</p> <p style="padding-left: 40px;">* Do you want to run the database creation procedure [YES]?</p>
15	<p>Set system disk files as not shelvable. VMSINSTAL can submit a command file to set all system disk files as non-shelvable. This protects the integrity of the system disk.</p> <p><u>Recommendation:</u> Compaq recommends you answer <b>Y</b> to the following question:</p> <p style="padding-left: 40px;">* Do you want to submit SETFILENOSHELV.COM [YES]?</p>
16	<p>At this point, the installation proceeds without further operator intervention. If you requested VMSINSTAL run the IVP, it runs it here.</p>

Note that VMSINSTAL deletes or changes entries in the process symbol tables during the installation. Therefore, if you are going to continue using the system manager's account and you want to restore these symbols, you should log out and log in again.

#### 4.1.2 Error Recovery

If errors occur during the installation procedure, VMSINSTAL displays failure messages. If the installation fails, you see the following message:

```
%VMSINSTAL-E-INSFAIL, The installation of HSM has failed
```

If the IVP fails, you see this message:

```
The HSM Installation Verification Procedure failed.
```



```
%VMSINSTAL-E-IVPFAIL, The IVP for HSM has failed.
```

Errors can occur during the installation if any of the following conditions exist:

- The operating system version is incorrect.
- Quotas necessary for successful installation are insufficient.
- System parameter values for successful installation are insufficient.
- The OpenVMS help library is currently in use.
- The product license has not been registered and loaded.

For descriptions of the error messages generated by these conditions, see the OpenVMS documentation on system messages, recovery procedures, and OpenVMS software installation. If you are notified that any of these conditions exist, you should take the appropriate action as described in the message.

## 4.2 After Installing HSM Software

The following postinstallation tasks should be performed after installing HSM software:

- Edit the system startup and shutdown files.
- Modify system parameter settings.
- Create an HSM catalog, if you did not have the installation do so.
- Install special device drivers.

## 4.3 Editing the System Startup and Shutdown Files

You must edit the system startup and shutdown files to provide for automatic startup and shutdown.

Add the command line that starts HSM to the system startup file, called SYSS\$MANAGER:SYSTARTUP\_VMS.COM.

HSM cannot start until after the network has started. You must place this new command line after the line that executes the network startup command procedure.

The following example shows the network startup command line followed by the HSM startup command line:

```
$ @SYSS$MANAGER:STARTNET.COM  
:  
:  
$ @SYSS$STARTUP:HSM$STARTUP.COM
```

The HSM\$STARTUP.COM procedure defines logicals required by the HSM software, connects the HSDRIVER software for VAX or Alpha systems, and issues an SMU STARTUP command to start the shelf handler process. The shelf handler process runs continuously and exits only with the SMU SHUTDOWN command. You may restart the shelf handler manually by using the SMU STARTUP command.

You also can connect the HSDRIVER software manually. To do this, use one of the following commands:

## Installing HSM Software

### 4.4 Creating an HSM Catalog

- For a VAX system:  

```
§ MCR SYSGEN CONNECT HSA0: /NOADAPTER
```

- For an Alpha system:  

```
§ MCR SYSMAN IO CONNECT HSA0: /NOADAPTER
```

Add the following command line to the system shutdown file, called SY\$SMANAGER:SYSHUTDOWN.COM:

```
§ SMU SHUTDOWN/NOW
```

### 4.4 Creating an HSM Catalog

The HSM catalog is the one and only authority containing information about shelved files. It grows as files get shelved.

If you did not have the installation create an HSM catalog for you, you must create it manually before you start HSM. To manually create the catalog, invoke SY\$STARTUP:HSM\$CREATE\_CATALOG.COM. This creates a single catalog for HSM to access.

When a catalog is created in this manner, it will be configured in Basic mode by default. SMU SET FACILITY/MODE=PLUS should be executed after the catalog is created if Plus mode is desired. Creating a new Basic mode catalog in an environment that was previously defined in Plus mode can cause unpredictable results.

The HSM\$STARTUP.COM file placed in SY\$STARTUP at installation time creates several system wide logicals used by HSM. These logicals are stored in a file called HSM\$LOGICALS.COM and includes the logical HSM\$CATALOG. This logical points to the directory where HSM should look for the shelving catalog. If you wish to change the location of the catalog, the line in SY\$STARTUP:HSM\$LOGICALS.COM that defines this logical should be changed.

---

#### Note

---

**HSM does not automatically create a new catalog if it cannot find the catalog in the location pointed to by HSM\$CATALOG; this condition aborts HSM startup with an error message.**

---

The system logical HSM\$CATALOG should be created ahead of time to specify the location for the catalog. If you have not already created the logical, you are prompted to define it now and to restart the procedure. You still must modify the line in HSM\$LOGICALS.COM to reflect that location if it is other than the default. The new catalog file is empty when created.

### 4.5 Installation Verification Procedure

As mentioned in the installation procedure itself, VMSINSTAL can run an IVP upon completion of the HSM installation. The IVP attempts to verify that HSM can shelve and unshelve files using default configuration information. For a complete example of the HSM IVP, see Appendix A for HSM Basic mode or Appendix B for HSM Plus mode.

## Installing HSM Software 4.5 Installation Verification Procedure

---

### Note

---

**You can run the IVP by itself. If you do, it shuts down HSM.  
Use `SYS$STARTUP:HSM$STARTUP.COM` to restart HSM after the IVP finishes.**

---

**Installing HSM Software**  
**4.5 Installation Verification Procedure**

---

## Getting Started with HSM

HSM comes with a set of default configuration definitions that enable you to get HSM up and running quickly. This chapter explains how to use those definitions and perform other essential configuration tasks to start using HSM. Once HSM is up and running, you can modify the configuration for optimal performance in your operational environment. Read the Customizing the HSM Environment Chapter in the HSM Guide to Operations Manual for more information on tuning.

This chapter includes the following topics:

- A description of the default configuration installed with HSM
- A discussion of how to make minimal adjustments to the default configuration for HSM to function in your operational environment
- A description of how to set up the near-line and off-line environments for both Basic and Plus modes
- Example off-line configurations for both Basic and Plus modes

### 5.1 HSM's Default Configuration

After installation, HSM is configured with all the default definitions designed into the software. This section explains in detail what the default configuration definitions are and how you need to modify them to get HSM up and running. If you follow the steps in this section, you should be able to shelve and unshelve data on your system. For more information on optimizing HSM functions for your environment, read the Customizing the HSM Environment Chapter in the HSM Guide to Operations Manual.

When you install HSM, it sets up several default elements you can use to run HSM with few modifications. These default elements include the following:

- A default facility definition
- A default shelf definition
- A default device definition
- A default volume definition
- Default policy definitions

#### 5.1.1 The Default Facility

- The facility is initially set up with the following attributes:
- All HSM operations are enabled
- All event logging is enabled

## Getting Started with HSM

### 5.1 HSM's Default Configuration

- All nodes are authorized as shelf servers
- Use of a catalog server is disabled
- Default mode depends on whether MDMS/SLS is installed on your system

These operations and event logging defaults represent the behavior that is recommended and expected to be used most of the time that HSM is in operation.

You should customize your shelf servers to be restricted to the larger systems in your cluster and to those that have access to the desired near-line and off-line devices.

#### 5.1.2 The Default Shelf

HSM provides a default shelf that supports all online disk volumes. The default shelf enables HSM operations.

Note that no archive classes are set up for the default shelf at initialization. To enable HSM operations to near-line and off-line devices, you need to configure the default shelf to one or more archive classes.

#### 5.1.3 The Default Device

HSM provides a default device record, which applies when you create a device without specifying attributes for the device. The default attributes are:

- The device is shared with other applications.
- Shelving and unshelving operations are enabled.
- No archive classes are associated with the device.

For the device to be used by HSM, you must at minimum associate one or more archive classes with the device. You may also choose to dedicate any device for exclusive HSM use.

#### 5.1.4 The Default Volume

HSM provides a default volume record, which applies to all online disk volumes in the system unless a specific volume entity exists for them. The default volume contains the following attributes:

- Explicit HSM operations (preshelving, shelving, unshelving, file faults, unpreshelving) are enabled.
- Implicit HSM operations (policy-based operations) are disabled.
- Contiguous files are ineligible for shelving
- Placed files are eligible for shelving
- The high water mark is 90 percent.

If these attributes are acceptable, no further configuration of volume records is needed.

You may change the volume attributes in one of two ways:

- Update the default volume record, which will affect all online disk volumes associated with the default volume.

- Create an individual volume entity for each online disk volume you want to change. This is recommended if you turn on policy-based HSM operations.

Compaq recommends you examine disk usage before enabling implicit shelving operations on your cluster. For example, enabling a high water mark criterion on the default volume could cause immediate mass shelving on all volumes if the disk usage is already above the high water mark.

Compaq also recommends that you create an individual volume record for each system disk and disable all HSM operations on those volumes.

### 5.1.5 The Default Policies

HSM provides three default policies as follows:

- `HSM$DEFAULT_POLICY`-This is used as a template for all policy definitions, including the other two default policies.
- `HSM$DEFAULT_OCCUPANCY`-This policy is used as the default reactive policy definition in the system for device full and high water mark triggers.
- `HSM$DEFAULT_QUOTA`-This policy is used as the default reactive policy definition in the system for exceeded quota triggers.

At installation time, all three default policies contain the same attributes:

- The policy is enabled for shelving (rather than preshelving).
- The comparison date used for file selection is the expiration date, which when used in conjunction with OpenVMS volume retention time, provides an effective date of last read or write access.
- The elapsed time is set to 180 days; This means that files that have been accessed within 180 days will not be selected for shelving.
- The low water mark goal for the policy is 80 percent.
- The primary policy file selection algorithm is space time working set (STWS).
- The secondary policy file selection algorithm is least recently used (LRU).

These default policy definitions allow HSM to function effectively with the minimum of advance configuration and can be used without any modifications or additional information.

By default, all volumes use the appropriate default policies without any further configuration being required.

## 5.2 Running HSM with the Default Configuration

Although HSM provides the default elements described above, you cannot simply try to run HSM with these items. You must verify the facility definition and configure the following additional items for HSM to function:

- Define archive classes for use.
- Select archive classes for the default shelf.
- Define devices to support each archive class.
- Initialize the tape volumes for each archive class.

## Getting Started with HSM

### 5.2 Running HSM with the Default Configuration

- Set volume retention times on all online disks on which you want policy-based shelving to occur.

#### 5.2.1 Verifying the Facility Definition

As mentioned earlier, HSM provides a default facility definition. Before you start using HSM, however, you want to verify that the default facility definition is correct for your environment.

The following example shows how to view information about the facility:

```
$ SMU SHOW FACILITY

HSM is enabled for Shelving and Unshelving

Facility history: Created: 22-APR-1999 12:10:37.13
Revised: 22-APR-1999 12:10:37.13
Designated servers: NODE1 NODE2
Current server: NODE1
Catalog server: Disabled
Event logging: Audit Error Exception
HSM mode: Plus
Remaining license: 20 gigabytes
```

The information displayed indicates:

- Whether the facility is enabled for shelving, unshelving, or both
- Which nodes on the cluster are designated as shelf servers
- The current shelf server node
  - An indication of whether all catalog writes and caching operations are performed by the shelf server node
  - What log options are turned on
  - The HSM operational mode (Basic or Plus)
  - The remaining license space (in gigabytes) for the HSM facility

If any of these attributes are not correct for your facility, you need to modify them before continuing to configure HSM.

#### 5.2.2 Defining Archive Classes for Use

To define an archive class for HSM to use, use one of the following commands depending on the mode in use. For HSM Basic Mode use:

```
$ SMU SET ARCHIVE n ! for Basic Mode
```

For HSM Plus Mode use:

```
$ SMU SET ARCHIVE n -_$/MEDIA_TYPE=string -_$/DENSITY=string -_$/
ADD_POOL=string
```

Where *n* is a list of archive class numbers from 1 to 36 (Basic mode), or 1 to 9999 (Plus mode).

In Plus mode, the *DENSITY* and *ADD\_POOL* qualifiers are optional. The *MEDIA\_TYPE* and *DENSITY* must exactly match the definitions in *TAPESTART.COM* (see Section 6.4).



### 5.2.3 Selecting Archive Classes for the Default Shelf

During installation, HSM creates a default shelf named HSM\$DEFAULT\_SHELF. To allow shelving operations, the shelf must be associated with one or more archive classes. When data is copied to the shelf, it is copied to each of the archive classes specified. Having several archive classes provides you additional safety for your shelved files. Each archive class is written to its own set of media. Compaq recommends having at least two archive classes.

Archive classes are represented in HSM by both an archive name and an archive identifier. The properties of archive classes depends on the selected HSM operational mode:

**Basic Mode** –Basic mode supports up to 36 archive classes named HSM\$ARCHIVE01 to HSM\$ARCHIVE36, with associated archive identifiers of 1 to 36 respectively. The media type for the archive class is determined by the devices associated with the archive class. It is not specifically defined.

**Plus Mode** –Plus mode supports up to 9999 archive classes named HSM\$ARCHIVE01 to HSM\$ARCHIVE9999, with associated archive identifiers of 1 to 9999 respectively. You specify the media type and (optionally) density which must exactly agree with the corresponding fields associated with off-line devices in the MDMS/SLS file TAPESTART.COM. Specifying a volume pool allows you to reserve specific volumes for HSM use.

Restore archive classes are the classes to be used when files are unshelved. HSM attempts to unshelve files from the restore archive classes in the specified order until the operation succeeds. To establish your restore archive classes, you use the /RESTORE qualifier.

The following command associates archive classes 1 and 2 with the default shelf. It also specifies that UNSHELVE operations use the restore archive classes 1 and 2. Each archive class has an associated media type.

```
$ SMU SET SHELF/DEFAULT/ARCHIVE_ID=(1,2)/RESTORE_ARCHIVE=(1,2)
```

IF You Want to...	THEN Use . . .
Use one archive class	SMU SET SHELF/DEFAULT /ARCHIVE=1/RESTORE=1
Use two archive classes	SMU SET SHELF/DEFAULT /ARCHIVE=(1,2) /RESTORE=(1,2)
Use three archive classes	SMU SET SHELF/DEFAULT/ARCHIVE=(1,2,3) /RESTORE=(1,2,3)

### 5.2.4 Defining Devices for the Archive Classes

Now you need to specify which near-line/off-line devices you want to use for copying shelved file data to the archive classes. You must specify a minimum of one device to support near-line or off-line shelving.

#### Dedicating Devices

In some circumstances, it is beneficial to dedicate a device for HSM operations. You may want to dedicate a device if you expect a lot of HSM operations on that device and you do not want those operations to be interrupted by another process.

## Getting Started with HSM

### 5.2 Running HSM with the Default Configuration

For each device definition you create, you have the option of dedicating the device or sharing the device. A dedicated device is allocated to the HSM process. A shared device is allocated to HSM only in response to a request to read or write to the media. Once the operation completes, the device is available to other applications.

The SMU SET DEVICE/DEDICATE command is used to dedicate a device, the SMU SET DEVICE/SHARE command is used to share a device. The following options are for dedicating or sharing a device:

<b>ALL (default)</b>	<b>Uses the device for shelf, preshelve, unshelve, and cache flush operations</b>
SHELVE	Uses the device exclusively for shelf, preshelve, and cache flush operations
UNSHELVE	Uses the device exclusively for unshelve operations. When you dedicate a device for HSM operations, you must make sure the archive classes you assign to the device are compatible with the operations you want to perform.

<b>IF You Want to . . .</b>	<b>THEN Use Command/Qualifier . . .</b>
Specify a dedicated device:	SMU SET DEVICE /DEDICATE=ALL device
Specify a shared device:	SMU SET DEVICE /SHARE=ALL device
Support the device for one archive class	SMU SET DEVICE device: /ARCHIVE=1
Support the device for two archive classes	SMU SET DEVICE device:/ARCHIVE=(1,2)
Support the device for three archive classes	SMU SET DEVICE device: /ARCHIVE=(1,2,3)

#### Archive Class, Device, and Media Type

For HSM Basic mode, when you associate an archive class with a particular device, you implicitly define the media type for that archive class. HSM, in Basic mode, determines media type for a given device based on the device type.

#### Robot Name

In Basic mode, you must associate a Robot Name with a tape magazine loader if you wish it to be robotically controlled.

### 5.2.5 Initializing Tape Volumes for Each Archive Class

After setting up the devices, you must initialize each tape volume for the archive classes to be used.

For Plus mode, the tape volumes are defined by using STORAGE ADD VOLUME commands to MDMS/SLS. For jukebox loaders such as the TL81x and TL82x, it is important that the vol-

## Getting Started with HSM

### 5.2 Running HSM with the Default Configura-

umes names match the external volume label and bar code on the volume. You can use the OpenVMS INITIALIZE command to initialize volumes, or use the SLS Operator Menu (option 3) to do this.

HSM Basic mode uses a different approach. There are fixed labels for use in each archive class as shown in Table 5–1 :

**Table 5–1 Archive Class Identifier/Label Reference for HSM Basic Mode Archive**

Archive Id	Archive Label	Volume Id	Volume Label	Volume Id	Label
1	HS0xxx	13	HSCxxx	25	HSOxxx
2	HS1xxx	14	HSDxxx	26	HSPxxx
3	HS2xxx	15	HSExxx	27	HSQxxx
4	HS3xxx	16	HSFxxx	28	HSRxxx
5	HS4xxx	17	HSGxxx	29	HSSxxx
6	HS5xxx	18	HSHxxx	30	HSTxxx
7	HS6xxx	19	HSIxxx	31	HSUxxx
8	HS7xxx	20	HSJxxx	32	HSVxxx
9	HS8xxx	21	HSKxxx	33	HSWxxx
10	HS9xxx	22	HSLxxx	34	HSXxxx
11	HSAXxx	23	HSMxxx	35	HSYxxx
12	HSBxxx	24	HSNxxx		HSZxxx

In the table, the values for xxx are as follows:

001, 002, ..., 099, 101, 102, ..., 199, 201, 202, ..., 999, A01, A02, ..., A99, B01, B02, ..., Z99

This naming convention must be adhered to for Basic Mode, allowing up to 3564 volumes per archive class. An archive class always starts with the "001" value and progresses up in order, as shown.

Use the OpenVMS INITIALIZE command to initialize the physical tape volumes for each archive class that you use.

The following examples show how to initialize two tape volumes each for archive class 1 and 2.

```

Archive Class ID
_ $ INITIALIZE $1$MUA100: HS0001 ! tape 1 for archive class ID 1
$ INITIALIZE $1$MUA200: HS0002 ! tape 2 for archive class ID 1
$ INITIALIZE $1$MUA100: HS1001 ! tape 1 for archive class ID 2
$ INITIALIZE $1$MUA200: HS1002 ! tape 2 for archive class ID 2
Tape volume

```

## Getting Started with HSM

### 5.2 Running HSM with the Default Configuration

---

#### Note

---

**It is vital for correct use for all tape volumes to have different labels. If you initialize multiple volumes with the same label, HSM will not be able to differentiate between them and will not be able to unshelve files on the volumes.**

---

#### 5.2.6 Set Volume Retention Times for Policy-Based Shelving

Each template policy uses the expiration date as the basis for selecting files for shelving. This default is intended to be used with the OpenVMS volume retention feature to provide an effective date of last access. The date of last access is the optimal way to select truly dormant files for shelving by policy.

To use the default policy effectively, you must enable volume retention on each volume used for shelving. If you do not specifically enable volume retention on a volume, expiration dates for files on the volume usually will be zero. In this case, the default policy will not select any files for shelving.

#### Verifying Privileges

To set volume retention, you must be allowed to enable the SYSPRV system privilege or have write access to the disk volume index file.

#### Setting Volume Retention

To set volume retention dates, use the following procedure. For more information about the OpenVMS command SET VOLUME/RETENTION, see the OpenVMS DCL Dictionary.

1. Enable the system privilege for your process:

```
$ SET PROCESS/PRIVILEGE=SYSPRV
```

2. Enable retention times for each disk volume on your system:

```
$ SET VOLUME/RETENTION=(min,[max])
```

For min and max, specify the minimum and maximum periods of time you want the files retained on the disk using delta time values. If you enter only one value, the system uses that value for the minimum retention period and calculates the maximum retention period as either twice the minimum or as the minimum plus seven days, whichever is less.

If you are not already using expiration dates, the following settings for retention times are suggested:

```
$ SET VOLUME/RETENTION=(1-, 0-00:00:00.01)
```

#### Initializing File Expiration Dates

Once you set volume retention on a volume and define a policy using expiration date as a file selection criteria, the expiration dates on files on the volume must be initialized. HSM automatically initializes expiration dates the first time a policy runs on the volume. This initializes dates

for all files on the volume that do not already have an expiration date. The expiration date is set to the current date and time, plus the maximum retention time as specified in the SET VOLUME/RETENTION command.

After the expiration date has been initialized, the OpenVMS file system automatically updates the expiration date upon read or write access to the file, at a frequency based on the minimum and maximum retention times.

## 5.3 Additional Configuration Items

There are three additional configuration tasks you may want to perform to use in connection with HSM's default configuration:

- Authorize shelf servers
- Specify a cache for HSM to use
- Schedule default policy execution

### 5.3.1 Authorizing Shelf Servers

If your cluster contains a mixture of large nodes and smaller satellite workstations, you may want to restrict shelf server operation to the larger nodes for better performance.

Use the SET FACILITY command to initially authorize your shelf server. See the SMU SET FACILITY command in the HSM Guide to Operations for detailed information on this command. In the following example, two nodes (NODE1 and NODE2) are authorized as shelf servers. By default, all shelving operations and all event logging are enabled also.

```
$ SMU SET FACILITY/SERVER=(NODE1,NODE2)
```

If you omit the /SERVER qualifier, all nodes in the cluster are authorized as shelf servers.

IF You Want to ...	THEN Use...
Authorize one node for shelf server operation	SMU SET FACILITY/SERVER=node
Authorize several nodes for shelf server operation	SMU SET FACILITY/SERVER=(node,node,...)
Authorize all nodes for shelf server operation	SMU SET FACILITY/NOSERVER (default)

### 5.3.2 Working with a Cache

A cache provides many performance benefits for HSM operations, for example, a significant improvement in the response time during shelving operations.

If you would like to use a magneto-optical device as a shelf device instead of, or in addition to near-line /off-line devices, define the magneto-optical device as a cache.

IF You Want to...	THEN Use Command/Qualifier . . .
Define a cache volume	SMU SET CACHE device:

## Getting Started with HSM

### 5.3 Additional Configuration Items

IF You Want to...	THEN Use Command/Qualifier . . .
Set the cache block	SMU SET CACHE device: /BLOCK=value size
Change the flush device:	SMU SET CACHE /INTERVAL=time interval
Specify the flush SMU SET CACHE device:	: /AFTER=time start_time

#### 5.3.3 An Example of Managing Online Disk Cache

A system manager has decided that approximately 250,000 blocks of online disk cache will improve application availability by reducing shelving time.

There are three user disks that contain various amounts of available storage capacity: \$1SDUA13, \$1SDUA14, and \$1SDUA15. The three disk volumes are defined as cache devices with differing amounts of capacity:

```
$1SDUA13 is set to 100,000 blocks
$1SDUA14 is set to 50,000 blocks
$1SDUA15 is set to 100,000 blocks
```

#### 5.3.4 Running Default Policies

HSM includes a set of default policy definitions to provide a working system upon installation. These definitions are created during the installation procedure and are immediately implemented. The definitions also are used when creating additional definitions.

Although schedules are maintained in a database, there is no supplied schedule for the default preventive policy HSM\$DEFAULT\_POLICY. If you want to implement a preventive policy, you must use the SMU SET SCHEDULE command as shown in the HSM Guide to Operations.

Table 5–2 lists the supplied default policy definitions that are configured for operation upon installing HSM.

**Table 5–2 Supplied Default Policy Definitions**

Definition	Name
Preventive policy	HSM\$DEFAULT_POLICY +
Reactive policies	HSM\$DEFAULT_OCCUPANCY, HSM\$DEFAULT_QUOTA + These default definitions cannot be deleted.

#### 5.3.5 Template Policy Definitions

The default definitions for the disk volume, shelf, and preventive policy are also template definitions. When you create new disk volume, shelf, and policy definitions, any parameters not given a value use the parameter value in the template definition.

##### 5.3.5.1 Using a Template Policy Definition

The following steps show how the policy template definition HSM\$DEFAULT\_POLICY provides values for a newly created policy definition.

## Getting Started with HSM

### 5.3 Additional Configuration Items

11. Examine the template definition values. The policy template definition contains the default values.

```
$ SMU SHOW POLICY/DEFAULT/FULL

Policy HSM$DEFAULT_POLICY is enabled for shelving
Policy History:
Created:      8-JUN-1999 12:39:32.34
Revised:     8-JUN-1999 12:39:32.34
Selection Criteria:
State:       Enabled
Action:      Shelving
File Event:  Expiration date
Elapsed time: 180 00:00:00
Before time: <none>
Since time:  <none>
Low Water Mark: 80 %
Primary Policy: Space Time Working Set (STWS)
Secondary Policy: Least Recently Used (LRU)
Verification:
Mail notification: <none>
Output file: <none>
```

12. Create a new policy in which the comparison date is based on the last backup date and the low water mark is set to 40 percent.

```
$ SMU SET POLICY NEW_POLICY /BACKUP/LOWWATER_MARK=40
```

13. Examine the newly created policy definition and compare the values with the default. In this example:

The primary policy and secondary policy values are from the default policy definition. The comparison date and the low water mark values have been changed.

```
$ SMU SHOW POLICY/FULL NEW_POLICY

Policy NEW_POLICY is enabled for shelving
Policy History:      Created:  20-OCT-1994 13:49:26.64
Revised:            20-OCT-1994 13:49:26.64
Selection Criteria:
State:              Enabled
Action:             Shelving
File Event:         Backup date
Elapsed time:       180 00:00:00
Before time:        <none>
Since time:         <none>
Low Water Mark:    40 %
Primary Policy:     Space Time Working Set(STWS)
Secondary Policy:   Least Recently Used(LRU)
Verification:
Mail notification:  <none>
Output file:        <none>
```

#### 5.3.5.2 Changing Default Policy Definitions

You may use the values supplied in the template definition or change them to suit your needs. To change the values of a template definition, use the SMU SET POLICY command to change the named default definition, or use the /DEFAULT qualifier to change the template itself.

#### Examples

Either of the following commands set the HSM\$DEFAULT\_POLICY secondary policy to STWS:

```
SMU> SMU SET POLICY /SECONDARY_POLICY=STWS/DEFAULT
```

## Getting Started with HSM

### 5.4 Plus Mode Offline Environment

```
SMU> SMU SET POLICY HSM$DEFAULT_POLICY /SECONDARY_POLICY=STWS
```

## 5.4 Plus Mode Offline Environment

In Plus mode, you are using MDMS or SLS as your media manager. In addition to setting up the HSM configuration as described above, you also need to set up the MDMS/SLS environment to agree with the HSM definitions. This section discusses the minimum MDMS/SLS operations to run HSM in Plus mode.

This section does not explain everything you need to do to first set up MDMS in an environment. For detailed instructions on installing and configuring MDMS, see the Media and Device Management Services for OpenVMS Guide to Operations.

### 5.4.1 How HSM Plus Mode and MDMS Work Together

By using Media and Device Management Services for OpenVMS (MDMS) software, HSM Plus mode uses common media and device management capabilities. MDMS provides these common services for various storage management products, such as Archive Backup System (ABS) and Storage Library System for OpenVMS (SLS), as well as HSM.

### 5.4.2 How MDMS Supports HSM

MDMS provides the following services:

- An integrated and shared approach to controlling access to devices
- A shared database to media and device information
- Common commands that allow you to manage media across storage management products

What this means for HSM is:

If you already use MDMS to support some other storage management product, you will need to do little to add functionality for HSM.

If you do not use MDMS for other storage management products now, you can start using it for HSM and add other products later without having to shift your media and device management approach.

HSM can now support more devices, including TL820s as fully robotic devices.

HSM can support gravity-controlled loading in a Digital Linear Tape (DLT) magazine loader in addition to robotically-controlled loading in a DLT.

### 5.4.3 MDMS Commands for HSM Plus Mode Use

For HSM to work with MDMS, there are various MDMS commands you may need to use.

Table 5-3 lists the MDMS commands you may need to use for HSM Plus mode and describes what each one does. Later sections of this chapter describe how to use some of these commands.



For detailed information on working with MDMS, see the Media and Device Management Services for OpenVMS Guide to Operations.

**Table 5–3 MDMS Commands for HSM Plus Mode**

MDMS Command	Description
ADD DRIVE	Returns a drive to the pool of available drives for MDMS to use.
ADD MAGAZINE	Adds a magazine name to the magazine database.
ADD VOLUME	Adds a new volume record with the specified attributes to the volume database.
BIND	Binds a volume to a slot in a magazine.
CREATE LABEL	Closes the current label file for MDMS and opens a new one.
EXPORT CARTRIDGE	Exports a tape cartridge to the out port of a tape jukebox, such as a TL820.
EXPORT MAGAZINE	Requests that a specific magazine be removed from a tape jukebox.
IMPORT CARTRIDGE	Imports a single cartridge from the in port of a tape jukebox to a slot inside the jukebox.
IMPORT MAGAZINE	Imports a magazine into the jukebox.
INVENTORY JUKEBOX	Performs a physical inventory of the cartridges in a tape jukebox, such as a TL820 or a DLT loader.
LABEL	Generates a printable label for a volume or volume set.
REMOVE DRIVE	Removes a drive from the pool of available drives for MDMS to use.
REMOVE MAGAZINE	Removes a magazine name from the magazine database.
REMOVE VOLUME	Removes a volume record from the volume database.
SET VOLUME	Modifies the attributes of a volume.
SHOW	Various SHOW commands to display MDMS values and attributes.
UNBIND	Unbinds a volume from a magazine and removes the volume name from the magazine database.

#### 5.4.4 MDMS Configuration Tasks Required to Support HSM Plus Mode

To enable HSM to work with MDMS, you must perform the following tasks:

1. Define media triplets in SYSS\$MANAGER:TAPESTART.COM.
2. Add volumes and volume pools to the MDMS database.
3. Authorize HSM to access volumes in appropriate pools.
4. If you are using magazines for HSM, add magazines to the magazine database and bind the volumes to them.
5. If you are using large tape jukeboxes, there are some special configuration items in TAPESTART.COM. Also, you will need to import the volumes into the jukebox.

For detailed instructions on performing MDMS tasks, refer to the MDMS Software Installation and Configuration Chapter in this book. see the Media and Device Management Services for OpenVMS Guide to Operations.

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### 5.4 Plus Mode Offline Environment

#### 5.4.4.1 Defining Media Triplets

MDMS uses a concept called a media triplet to identify media types and drives the software is allowed to use. The media triplet is comprised of the following symbols:

---

MTYPE_n	A name that identifies the media type, often related to the physical media type, such as TK85K, TA90, or HSM_TK50. This is the item you identify when you use the SMU SET ARCHIVE / MEDIA_TYPE command in HSM.
DENS_n	The density for media of this type. If there is a value here, you also must include it in the SMU SET ARCHIVE /DENSITY command in HSM. <ul style="list-style-type: none"> <li>If the drives for this media type support tape data compaction, set DENS_n to COMP.</li> <li>For some types of media, such as 9-track, set DENS_n to the real density of the media (for example, 800, 1600, or 6250 for 9-track)</li> <li>Otherwise, leave DENS_n blank.</li> </ul>
DRIVES_n	The tape drives that can support this type of media. Although a drive is listed here, HSM only uses that drive if you enable it with the SMU SET DEVICE command. <p>Some products that interact with MDMS use a fourth item, CAPACITY_n, in their media definitions. For HSM, this symbol is not needed, but can be defined in the media triplet.</p>

---

#### 5.4.4.2 Defining Tape Jukeboxes

If you are going to use robotically-controlled tape jukeboxes, you need to define the jukeboxes in TAPESTART.COM.

There are two symbols you must define in TAPESTART.COM to use any type of tape jukeboxes with robotic loading. These symbols are:

---

TAPE_JUKEBOXES	A list of all tape jukebox names.
tape_jukebox_name	For each name in TAPE_JUKEBOXES, identifies the robot device and tape drives controlled by that device.

---

The following example shows a correctly-configured jukebox definition:

```

$!
$! -----
$! Node Name
$!
$NODE := 'F$TRNLNM ("SYS$NODE")'
$NODE = NODE - ":@" - "_"
$!
$!-----
$!
$! Jukebox definitions

```

```
$!  
$!-----  
$  
$TAPE_JUKEBOXES := "TL810_1"  
$TL810_1 := "'NODE'::$1$DUA810, 'NODE'::$1$MUA43, -  
'NODE'::$1$MUA44, 'NODE'::$1$MUA45, 'NODE'::$1$MUA46"
```

Notice that the node name is required in such definitions, and should reflect the node name on which the command procedure is run. As such, the use of the variable ''NODE' parameter is recommended. The drives referenced in this definition must also appear in the media triplets.

#### 5.4.4.3 Adding Volumes to MDMS Database for HSM to Use

Once you have defined all the appropriate symbols in TAPESTART.COM, you need to make MDMS aware of the volumes HSM will use. To do this, you use the STORAGE ADD VOLUME command. STORAGE ADD VOLUME has a number of possible qualifiers. For HSM's purposes, the only qualifiers that are essential are:

- /MEDIA\_TYPE- Must identify the media type you defined in TAPESTART.COM for this volume.
- /POOL- Identifies the volume pool to which the volume belongs.
- /DENSITY- Must identify the density defined in TAPESTART.COM for this media type, if something is assigned to DENS\_n.

Compaq recommends you put HSM volumes into volume pools. This prevents other applications from using HSM volumes and vice-versa.

#### 5.4.4.4 Authorizing HSM Access to Volumes

If you decide to put HSM volumes into volume pools (as described above), then you need to authorize HSM to access those pools. You authorize access to volume pools by using the Volume Pool Authorization function of the Administrator menu.

To access the Administrator menu, use one of the following commands:

```
$ RUN SLS$SYSTEM:SLS$SLSMGR  
or  
$ SLSMGR
```

The second command works only if you have installed MDMS and run the SYSSMAN-AGER:SLS\$TAPSYMBOL.COM procedure to define short commands for the MDMS menus.

To authorize HSM access to volume pools, use the user name HSM\$SERVER.

#### 5.4.4.5 Importing Volumes Into a Jukebox

Unless you are configuring a magazine loader (see Section 6.4.4.6), you need to import volumes into the jukebox. For this, use the STORAGE IMPORT CARTRIDGE command.

#### 5.4.4.6 Configuring Magazines

If you are using magazines (a physical container with some number of slots that hold tape volumes) with magazine loaders in MDMS, you need to:

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### 5.4 Plus Mode Offline Environment

1. Add the magazine names to the magazine database.
2. Let MDMS know which volumes belong to which magazines.

To add magazines to the magazine database, you use the `STORAGE ADD MAGAZINE` command. This command adds a magazine name into the magazine database. This command does not verify that this magazine exists or is available to any particular device for use. It simply adds a record to the database to identify the magazine.

To manually associate volumes with a magazine, you use the `STORAGE BIND` command. This command creates a link in the databases for the specified volume and magazine. Again, this does not ensure the specified volume is in the specified magazine, it simply updates the database entries. You must use the `/SLOT` qualifier to identify the slot in the magazine where the volume resides (or will reside).

If you prefer, you can automatically associate volumes with a magazine. To do this, you must have physical access to the magazine and an appropriate device and the volumes to be associated must be in the magazine. Then, you `IMPORT` the magazine into the device and use the `STORAGE INVENTORY JUKEBOX` command. `STORAGE INVENTORY JUKEBOX` reads the labels of the volumes in the magazine, binds the volumes to the magazine, assigns the magazine slot numbers to the volumes, and updates the magazine and volume databases. Note that the volumes need to be initialized before issuing the `INVENTORY` command.

#### 5.4.4.7 Importing Magazines or Volumes Into the Jukebox

Once you have defined the volumes, and optionally magazines, to use in the jukebox, they need to be imported into the jukebox. The command to use this depends on the actual hardware being used.

For a large tape jukebox such as a TL81x or TL82x, you import volumes directly into the jukebox ports using the `STORAGE IMPORT CARTRIDGE` command.

For a magazine loader such as a TZ877, you import the entire magazine into the jukebox using the `STORAGE IMPORT MAGAZINE` command.

To import volumes into a StorageTek silo, you use the `STORAGE IMPORT ACS` command. Refer to the HSM Command Reference Guide for more detail on this command.

#### 5.4.4.8 Working with RDF-served Devices in HSM Plus Mode

HSM Plus mode supports the use of RDF-served devices for shelving and unshelving. This means you can define devices that are physically separated from the cluster on which the shelving operations initiate. To do this, you must:

- Install remote capability (RDF) through MDMS.
- Define the device as a remote device in the MDMS configuration
- Use the `/REMOTE` qualifier on the `SMU SET DEVICE` command.

The following example shows how to set up the HSM device definition to work with a remote device:

```
$ SMU SET DEVICE FARNODE:::$2$MIA21 /REMOTE /SHARE=ALL /ARCHIVE=(3,4)
```

The following restrictions apply to working with remote devices:

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### 5.5 HSM Plus Mode Configuration Examples

- The node name must be included in the SMU SET DEVICE /REMOTE command.
- HSM does not have to exist on the remote server node, although RDF does.
- The archive classes you define to work with the RDF-served devices are logically different on each cluster.
- RDF-served devices cannot be dedicated for HSM use.

## 5.5 HSM Plus Mode Configuration Examples

The following sections illustrate various sample configurations for HSM Plus mode:

The first example sets up four TA90E drives, which support a specific media type. Three of the drives also support generic TA90 access from other applications besides HSM.

The second example shows how a TZ877 device can be configured with three magazines for HSM use.

The third example shows how a local TL820 can be configured with 50 HSM volumes.

The fourth example shows how to set up a RDF-served TL820 for HSM operations.

These examples show device and archive class configurations for HSM and MDMS. Other HSM details, such as associating archive classes with shelves, are not shown, but are the same as for HSM Basic mode.

These examples illustrate device definitions for HSM and MDMS. They do not attempt to show all commands needed to use HSM. For example, the following additional actions may be necessary:

- Loading the HSDRIVER and (if needed) GKDRIVER (see Installation Guide)
- Setting up an optional cache
- Setting up policies
- Starting up MDMS and HSM

### 5.5.1 Sample TA90 Configuration

The following procedure defines a media type for a basic device (TA90), adds 50 volumes of that media type to a particular pool, authorizes HSM only to access that pool, and defines the appropriate archive classes and HSM devices for these volumes.

1. Define the media triplet in TAPESTART.COM.

```
$ MTYPE_1 := TA90E
$ DENS_1 := COMP
$ DRIVES_1 := $1$MUA20,
$1$MUA21, $1$MUA22,
$1$MUA23
```

2. Define 50 volumes and add them to a volume pool called HSM\_POOL.

```
$ STORAGE ADD VOLUME AA0001/POOL=HSM_POOL/MEDIA_TYPE=TA90E/DENSITY=COMP
$ STORAGE ADD VOLUME AA0002/POOL=HSM_POOL/MEDIA_TYPE=TA90E/DENSITY=COMP
...
$ STORAGE ADD VOLUME AA0050/POOL=HSM_POOL/MEDIA_TYPE=TA90E/DENSITY=COMP
```

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### 5.5 HSM Plus Mode Configuration Examples

3. Use the MDMS Administrator Menu to authorize user HSM\$SERVER for access to volume pool HSM\_POOL on all nodes in the cluster. User HSM\$SERVER is the only user allowed to access volumes from this pool, thus the volumes are dedicated to HSM. If a pool is not used, the default pool for HSM\$SERVER is used (if any), or the MDMS default pool is used.

```
$ SLSMGR
```

4. Define two archive classes for HSM, both of which use media from HSM\_POOL, with media type TA90E with compaction.

```
$ SMU SET ARCHIVE 1 /ADD_POOL=HSM_POOL /DENSITY=COMP /MEDIA_TYPE=TA90E
$ SMU SET ARCHIVE 2 /ADD_POOL=HSM_POOL /DENSITY=COMP /MEDIA_TYPE=TA90E
```

5. Define the devices for HSM use, with \$1\$MUA23: being dedicated for HSM use.

```
$ SMU SET DEVICE $1$MUA20:, $1$MUA21:, $1$MUA22: /ARCHIVE=(1,2)
$ SMU SET DEVICE $1$MUA23: /DEDICATE=ALL /ARCHIVE=(1,2)
```

6. Associate the default shelf with the archive classes.

```
$ SMU SET SHELF /DEFAULT /ARCHIVE=(1,2) /RESTORE=(1,2)
```

#### 5.5.2 Sample TZ877 Configuration

The following procedure defines a media type and two jukeboxes for TZ877 DLT loaders, defines 14 volumes with two volume pools, authorizes HSM to access those volume pools, and defines the appropriate archive classes and HSM devices for these volumes.

1. Define the media type in TAPESTART.COM.

```
$ MTYPE_1 := TK85K
$ DENS_1 :=
$ DRIVES_1 :=
$1$MUA500:,
$1$MUA600:
```

2. Define the jukebox devices in TAPESTART.COM. The TZ877s are connected through an HSJ controller to give them cluster-wide access, where the robot names (command disk names) are \$1\$DUA500: and \$1\$DUA600: for devices \$1\$MUA500: and \$1\$MUA600: respectively.

```
$ NODE := 'F$TRNLNM ("SYS$NODE")'
$ NODE = NODE - ":" - "_"
$!
$ TAPE_JUKEBOXES := "JUKEBOX1, JUKEBOX2"
$ JUKEBOX1 := "'NODE'::$1$DUA500:, 'NODE'::$1$MUA500:"
$ JUKEBOX2 := "'NODE'::$1$DUA600:, 'NODE'::$1$MUA600:"
```

3. Define 14 volumes and add them to two volume pools called HSM\_POOL1 and HSM\_POOL2. This allows the specification of a separate pool for each magazine resulting in optimal selection of volumes when shelving files.

```
$ STORAGE ADD VOLUME TZ0001/POOL=HSM_POOL1/MEDIA_TYPE=TK85K
...
$ STORAGE ADD VOLUME TZ0007/POOL=HSM_POOL1/MEDIA_TYPE=TK85K
$ STORAGE ADD VOLUME TZ0008/POOL=HSM_POOL2/MEDIA_TYPE=TK85K
...
$ STORAGE ADD VOLUME TZ0014/POOL=HSM_POOL2/MEDIA_TYPE=TK85K
```

4. Use the MDMS Administrator Menu to authorize HSM\$SERVER to access the volume pools for all nodes in the cluster. User HSM\$SERVER is the only user allowed to access

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volumes from these pools, thus the volumes are dedicated to HSM.

```
$ SLSMGR
```

5. Define two magazines containing volumes for each archive class. The magazines are "named" HSM001 and HSM002.

```
$ STORAGE ADD MAGAZINE HSM001/SLOTS=7  
$ STORAGE ADD MAGAZINE HSM002/SLOTS=7
```

6. Bind the volumes to the magazines.

```
$ STORAGE BIND TZ0001 HSM001/SLOT=0  
...  
$ STORAGE BIND TZ0007 HSM001/SLOT=6  
$ STORAGE BIND TZ0008 HSM002/SLOT=0  
...  
$ STORAGE BIND TZ0014 HSM002/SLOT=6
```

7. IMPORT the magazines into the loaders as follows:

```
$ STORAGE IMPORT MAGAZINE HSM001 JUKEBOX1  
$ STORAGE IMPORT MAGAZINE HSM002 JUKEBOX2
```

8. Define two archive classes for HSM, using media from pools HSM\_POOL1 and HSM\_POOL2, with media type TK85K. Note that in this configuration, each magazine contains volumes for a single archive class.

```
$ SMU SET ARCHIVE 1 /MEDIA_TYPE=TK85K /ADD_POOL=HSM_POOL1  
$ SMU SET ARCHIVE 2 /MEDIA_TYPE=TK85K /ADD_POOL=HSM_POOL2
```

9. Define the devices for shared use.

```
$ SMU SET DEVICE $1$MUA500:, $1$MUA600: /ARCHIVE=(1,2)
```

9. Associate the default shelf with the archive classes.

```
$ SMU SET SHELF /DEFAULT /ARCHIVE=(1,2) /RESTORE_ARCHIVE=(1,2)
```

### 5.5.3 Sample TL820 Configuration

The following procedure defines a media type and jukebox definition for a TL820 device on the local cluster, defines 50 volumes and adds them to a pool, authorizes HSM and other applications to access the volumes in this pool, and defines appropriate archive classes and devices for use. In this example, the TL820 is connected to an HSJ controller with a robot name (command disk name) of \$1\$DUA820:

1. Define the media type in TAPESTART.COM.

```
$ MTYPE_1 := TK85K      $ DENS_1 :=  
$ DRIVES_1 := $1$MUA100:, $1$MUA200:, $1$MUA300:
```

2. Define the jukebox device in TAPESTART.COM.

```
$ NODE := 'F$TRNLNM ("SYS$NODE")'      $ NODE = NODE - "::" - "_"  
$!  
$ TAPE_JUKEBOXES := "TL820_1"  
$ TL820_1 := "'NODE'::$1$DUA820:, 'NODE'::$1$MUA100:, -  
'NODE'::$1$MUA200:, 'NODE'::$1$MKU300:"
```

3. Define 50 volumes and add them to a volume pool called TL820\_POOL.

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### 5.5 HSM Plus Mode Configuration Examples

```
$ STORAGE ADD VOLUME ACP001 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
$ STORAGE ADD VOLUME ACP002 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
...
$ STORAGE ADD VOLUME ACP050 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
```

- Using the MDMS Administrator Menu, authorize HSM, along with other applications such as Sequential Media File System or Archive/Backup System to access this volume pool.

```
$ SLSMGR
```

- The TL820 will be treated as a port loader, rather than a magazine loader. Import all 50 volumes into the loader. Note that MDMS and the TL820 hardware determine into which slot the volumes are loaded. HSM needs no knowledge of this.

```
$ STORAGE IMPORT CARTRIDGE ACP001 TL820_1
$ STORAGE IMPORT CARTRIDGE ACP002 TL820_1
...
$ STORAGE IMPORT CARTRIDGE ACP050 TL820_1
```

- Define three archive classes for HSM, all of which use media from TL820\_POOL, with media type TK85K

```
$ SMU SET ARCHIVE 1 /ADD_POOL=TL820_POOL /MEDIA_TYPE=TK85K
$ SMU SET ARCHIVE 2 /ADD_POOL=TL820_POOL /MEDIA_TYPE=TK85K
$ SMU SET ARCHIVE 3 /ADD_POOL=TL820_POOL /MEDIA_TYPE=TK85K
```

- Define the devices for HSM use. One device (drive in the TL820) is set up for dedicated HSM use on archive class 1 only (the primary archive class).

```
$ SMU SET DEVICE $1$MUA100:, $1$MUA200: /ARCHIVE=(1,2,3)
$ SMU SET DEVICE $1$MUA300: /DEDICATE=ALL /ARCHIVE=1
```

- Set the default shelf to utilize the archive classes:

```
$ SMU SET SHELF /DEFAULT /ARCHIVE=(1,2,3) /RESTORE=(1,2,3)
```

#### 5.5.4 Sample RDF-served TL820 Configuration

The following procedure defines a configuration for an RDF-served TL820 device that resides on a remote node. This example also shows the client and server definitions for setting up both nodes so that a client HSM system can access the TL820.

##### 5.5.4.1 Definitions on Client Node

The configuration for TAPESTART.COM on the client node (the one running HSM) is as follows:

- Define the database node and media triplet in TAPESTART.COM. Because the drives are on a RDF-served node, the node name must be specified in DRIVES\_n. The RDF-served node is named BOSTON.

```
$ PRI := BOSTON $ DB_NODES := BOSTON
$ MTYPE_1 := TK85K $ DENS_1 := $ DRIVES_1 := BOSTON::$1$MUA21:,
BOSTON::$1$MUA22:, BOSTON::$1$MUA23:
```

- Define the jukebox device in TAPESTART.COM. All device references must be prefaced by the node name of the RDF-served node.

```
$ TAPE_JUKEBOXES := "JUKE_TL820" $ JUKE_TL820 := "BOSTON::$1$DUA100:,
BOSTON::$1$MUA21:, - BOSTON::$1$MUA22:, BOSTON::$1$MUA23:"
```

- Define 20 volumes and add them to a volume pool called TL820\_POOL.



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### 5.5 HSM Plus Mode Configuration Examples

```
$ STORAGE ADD VOLUME APW201 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
$ STORAGE ADD VOLUME APW202 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
...
$ STORAGE ADD VOLUME APW220 /POOL=TL820_POOL /MEDIA_TYPE=TK85K
```

- Using the MDMS Administrator Menu, authorize HSM, along with other applications such as Sequential Media File System or Archive/Backup System to access this volume pool.

```
$ SLSMGR
```

- Define two archive classes for HSM, both of which use media from TL820\_POOL, with media type TK85K

```
$ SMU SET ARCHIVE 1 /ADD_POOL=TL820_POOL /MEDIA_TYPE=TK85K
$ SMU SET ARCHIVE 2 /ADD_POOL=TL820_POOL /MEDIA_TYPE=TK85K
```

- Define the devices for HSM use. All remote devices must be set up for shared access. The device names must match exactly those specified in DRIVES\_n in TAPESTART.COM.

```
$ SMU SET DEVICE BOSTON::$1$MUA21: /REMOTE /ARCHIVE=(1,2)
$ SMU SET DEVICE BOSTON::$1$MUA22: /REMOTE /ARCHIVE=(1,2)
$ SMU SET DEVICE BOSTON::$1$MUA23: /REMOTE /ARCHIVE=(1,2)
```

- Associated the default shelf with the archive classes.

```
$ SMU SET SHELF /DEFAULT /ARCHIVE=(1,2) /RESTORE_ARCHIVE=(1,2)
```

#### 5.5.4.2 Definitions on the RDF-served Node

The configuration for TAPESTART.COM on the RDF-served node (the one containing the TL820 device). Note that HSM does not have to be running on the RDF-served node, but MDMS or SLS must be installed and running. Also note that node BOSTON is the database node for MDMS for the enterprise.

- Define the media type in TAPESTART.COM. Note that because the drives are local to this system, no node name is specified.

```
$ PRI := BOSTON $ DB_NODES := BOSTON $! $ MTYPE_1 := TK85K
$ DENS_1 := $ DRIVES_1 := $1$MUA21:, $1$MUA22:, $1$MUA23:
```

- Define the jukebox device in TAPESTART.COM.

```
$ NODE := 'F$TRNLNM ("SYS$NODE")' $ NODE = NODE - "::" - "_"
$! $ TAPE_JUKEBOXES := "JUKE_TL820"
$ JUKE_TL820 := "'NODE'::$1$DUA100:, 'NODE'::$1$MUA21:, -
'NODE'::$1$MUA22:, 'NODE'::$1$MUA23:"
```

- The TL820 will be treated as a port loader, rather than a magazine loader. Import all 20 volumes into the loader. Note that MDMS and the TL820 hardware determine into which slot the volumes are loaded. HSM needs no knowledge of this. This command must be entered at the RDF-served node.

```
$ STORAGE IMPORT CARTRIDGE APW201 JUKE_TL820
$ STORAGE IMPORT CARTRIDGE APW202 JUKE_TL820
...
$ STORAGE IMPORT CARTRIDGE APW220 JUKE_TL820
```

Because node BOSTON is the database node, the volume and pool authorization entered on the client node are also valid on the server node.

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### 5.6 HSM Basic Mode Configuration Examples

## 5.6 HSM Basic Mode Configuration Examples

The following example shows how to configure the default shelf, archive classes, devices and caches in HSM Basic mode for two different configurations:

- The first example sets up two TZ877 devices for HSM use, each containing seven 20 GB cartridges. With two archive classes, the total HSM shelf size is 140 GB.
- The second example sets up an RW500 optical jukebox for use as the HSM shelf repository.

These examples illustrate device definitions for HSM. They do not attempt to show all commands needed to use HSM. For example, the following additional actions may be necessary:

- Loading the HSDRIVER and (if needed) GKDRIVER (see Installation Guide)
- Setting up an optional cache
- Setting up policies
- Starting up HSM

### 5.6.1 TZ877 Sample Configuration

The following procedure defines archive classes 1 and 2 for HSM use. We will assign one TZ877 loader to each archive class. In this example, the magazine loaders are connected directly to a SCSI bus on node OMEGA: as such, they can only be accessed from this node.

```
$!  
$ SMU SET ARCHIVE 1,2  
$ SMU SET SHELF /DEFAULT /ARCHIVE=(1,2) /RESTORE_ARCHIVE=(1,2)  
$ SMU SET DEVICE $  
1$MKA100: /ARCHIVE=1 /ROBOT_NAME=$1$GKA101:  
$ SMU SET DEVICE $1$MKA200: /ARCHIVE=2 /ROBOT_NAME=$1$GKA201:  
$ SMU SET FACILITY /SERVER=OMEGA  
$!  
$! Confirm Setup  
$!  
$ SMU SHOW ARCHIVE  
  
HSM$ARCHIVE01 has not been used  
Identifier: 1   Media type: CompactTape III, Loader   Label:   HS0001  
Position:    0   Device refs: 1   Shelf refs: 2  
  
HSM$ARCHIVE02 has not been used   Identifier: 1   Media type: CompactTape  
III, Loader   Label:   HS1001   Position:    0   Device refs: 1   Shelf  
refs: 2  
  
$ SMU SHOW SHELF  
  
Shelf HSM$DEFAULT_SHELF is enabled for Shelving and Unshelving  
Catalog File:  SYSSYSDEVICE:[HSM$SERVER.CATALOG]HSM$CATALOG.SYS  
Shelf History:  
Created:    30-MAY-1996 13:16:33.79  
Revised:   30-MAY-1996 13:56:00.27  
Backup Verification: Off  
Save Time:  <none>  
Updates Saved: All  
Archive Classes:  
Archive list:  
HSM$ARCHIVE01   id: 1           HSM$ARCHIVE02   id: 2   Restore list:  
HSM$ARCHIVE01   id: 1           HSM$ARCHIVE02   id: 2  
  
$ SMU SHOW DEVICE
```

## Getting Started with HSM

### 5.6 HSM Basic Mode Configuration Examples

```
HSM drive HSM$DEFAULT_DEVICE is enabled.
Shared access: < shelve, unshelve >
Drive status:  Not configured
Media type:    Unknown Type
Robot name:    <none>
Enabled archives: <none>
```

```
HSM drive _$1$MKA100: is enabled.
Dedicated access: < shelve, unshelve >
Drive status:    Configured
Media type:      CompacTape III, Loader
Robot name:      _$1$GKA101:
Enabled archives: HSM$ARCHIVE01  id: 1
```

```
HSM drive _$1$MKA200: is enabled.
Dedicated access: < shelve, unshelve >
Drive status:    Configured
Media type:      CompacTape III, Loader
Robot name:      _$1$GKA201:
Enabled archives: HSM$ARCHIVE02  id: 2
```

In addition, the tape volumes in each TZ877 loader must be initialized before using HSM. Either manually (using the front panel), or by using the Media Robot Utility (MRU), load each volume and initialize it as follows:

```
$ ROBOT LOAD SLOT 0 ROBOT $1$GKA101
$ INITIALIZE $1$MKA100: HS0001
$ ROBOT LOAD SLOT 1 ROBOT
$1$GKA101
$ INITIALIZE 1$MKA100: HS0002
...
$ ROBOT LOAD SLOT 6 ROBOT $1$GKA101
$ INITIALIZE $1$MKA100: HS0007
$ ROBOT LOAD SLOT 0 ROBOT $1$GKA201
$ INITIALIZE $1$MKA200: HS1001
$ ROBOT LOAD SLOT 1 ROBOT $1$GKA201
$ INITIALIZE $1$MKA200: HS1002
...
$ ROBOT LOAD SLOT 6 ROBOT $1$GKA201
$ INITIALIZE $1$MKA200: HS1007
```

#### 5.6.2 RW500 Example

In this example, we are configuring 8 out of 32 platters in an RW500 optical jukebox to be a permanent shelf repository for HSM. Note that the optical platters are set up as a permanent HSM cache, with no cache flushing and no specific block size restrictions. In addition, HSM shelving and unshelving operations must be specifically disabled on the cache devices and all other platters in the optical jukebox.

```
$ SMU SET CACHE $2$JBA0: /BLOCK=0 /NOINTERVAL /HIGHWATER=100 /NOHOLD
$ SMU SET CACHE $2$JBA1: /BLOCK=0 /NOINTERVAL /HIGHWATER=100 /NOHOLD
...
$ SMU SET CACHE $2$JBA7: /BLOCK=0 /NOINTERVAL /HIGHWATER=100 /NOHOLD
$!
$! Disable all shelving on ALL platters in the jukebox
$! $ SMU SET VOLUME $2$JBA0: /DISABLE=ALL
$ SMU SET VOLUME $2$JBA1: /DISABLE=ALL
...
$ SMU SET VOLUME $2$JBA31: /DISABLE=ALL
```

Note that shelving must be disabled on all platters when any of the platters are being used as an HSM cache to avoid platter load thrashing.

**Getting Started with HSM**  
**5.6 HSM Basic Mode Configuration Examples**

---

## DFS, NFS, and PATHWORKS Access

This chapter describes the remote access features of HSM using DFS, NFS, or PATHWORKS.

### 6.1 DFS, NFS and PATHWORKS Access Support

HSM Version 3.0 supports file access to shelved files on client systems where access is through DFS, NFS and PATHWORKS. At installation, HSM sets up such access by default. However, you may want to review this access and change it as needed, because it can potentially affect all accesses.

#### 6.1.1 DFS Access

File faulting (and therefore file events) work as expected, with the exception of CTRL-Y/exit. Typing CTRL-Y exit during a file fault has no effect. The client side process waits until the file fault completes and the file fault is not canceled.

In addition, with DFS one can determine the shelving state of a file just as if the disk was local (i.e. DIRECTORY/SHELVED and DIRECTORY/SELECT both work correctly).

The shelve and unshelve commands do not work on files on DFS-served devices. The commands do work on the VMScluster™ that has local access to the devices, however.

#### 6.1.2 NFS Access

The normal default faulting mechanism (fault on data access), does not work for NFS-served files. The behavior is as if the file is a zero-block sequential file. Performing "cat" (or similar commands) results in no output.

However, at installation time, HSM Version 3.0 enables such access by defining a logical name that allows file faults on an OPEN of a file by the NFS process. By default, the following system and cluster wide logical name is defined:

```
$ DEFINE/SYSTEM HSM$FAULT_ON_OPEN "NFS$SERVER"
```

This definition supports access to NFS-served files upon an OPEN of a file. If you do not want NFS access to shelved files, simply de-assign the logical name as follows:

```
$ DEASSIGN/SYSTEM HSM$FAULT_ON_OPEN
```

For a permanent change, this command should be placed in:

```
SYS$STARTUP:HSM$LOGICALS.COM
```

## DFS, NFS, and PATHWORKS Access

### 6.1 DFS, NFS and PATHWORKS Access Support

For NFS-served files, file events (device full and user quota exceeded) occur normally with the triggering process being the NFS\$SERVER process. The quota exceeded event occurs normally because the any files extended by the client are charged to the client's proxy not NFS\$SERVER.

If the new logical is defined for the NFS\$SERVER, the fault will occur on OPEN and appears transparent to the client, with the possible exception of messages as follows:

```
% cat /usr/oreo/shelve_test.txt.2
NFS2 server oreo not responding still trying NFS2 server oreo ok
```

The first message appears when the open doesn't complete immediately. The second message (ok) occurs when the open completes. The file contents, in the above example, are then displayed.

Typing CTRL-C during the file fault returns the user to the shell. Since the NFS server does not issue an IO\$\_CANCEL against the faulting I/O, the file fault is not canceled and the file will be unshelved eventually.

It is not possible from the NFS client to determine whether a given file is shelved. Further, like DFS devices, the shelve and unshelve commands are not available to NFS mounted devices.

#### 6.1.3 PATHWORKS

Normal attempts to access a shelved file from a PATHWORKS client initiate a file fault on the server node. If the file is unshelved quickly enough (e.g. from cache), the user sees only the delay in accessing the file. If the unshelve is not quick enough, an application-defined timeout occurs and a message window pops up indicating the served disk is not responding. The timeout value varies on the application. No retry is attempted. However, this behavior can be modified by changing HSM's behavior to a file open by returning a file access conflict error, upon which most PC applications retry (or allow the user to retry) the operation after a delay. After a few retries, the file fault will succeed and the file can be accessed normally. To enable PATHWORKS access to shelved files using the retry mechanism, HSM defines the following logical name on installation:

```
$ DEFINE/SYSTEM HSM$FAULT_AFTER_OPEN "PCFS_SERVER, PWRK$LMSRV"
```

This definition supports access to PATHWORKS files upon an OPEN of a file. If you do not want PATHWORKS to access shelved files via retries, simply de-assign the logical name as follows:

```
$ DEASSIGN/SYSTEM HSM$FAULT_AFTER_OPEN
```

For a permanent change, this command should be placed in:

```
SYS$STARTUP:HSM$LOGICALS.COM
```

The decision on which access method to use depends upon the typical response time to access shelved files in your environment.

If the logical name is defined, HSM imposes a 3-second delay in responding to the OPEN request for PATHWORKS accesses only. During this time, the file may be unshelved: otherwise, a "background" unshelve is initiated which will result in a successful open after a delay and retries.

At this point, the file fault on the server node is under way and cannot be canceled.

## DFS, NFS, and PATHWORKS Access

### 6.1 DFS, NFS and PATHWORKS Access Sup-

The affect of the access on the PC environment varies according to the PC operating system. For windows 3.1 and DOS, the computer waits until the file is unshelved. For Windows NT and Windows-95, only the windows application itself waits.

File events (device full and user quota exceeded) occur normally with the triggering process being the PATHWORKS server process. The quota exceeded event occurs normally because the any files extended by the client are charged to the client's proxy not the PATHWORKS server.

It is not possible from a PATHWORKS client to determine whether a file is shelved. In addition, there is no way to shelve or unshelve files explicitly (via shelve- or unshelve-like commands). There is also no way to cancel a file fault once it has been initiated.

Most PC applications are designed to handle "file sharing" conflicts. Thus, when HSM detects the PATHWORKS server has made an access request, it can initiate unshelving action, but return "file busy". The typical PC application will continue to retry the original open, or prompt the user to retry or cancel. Once the file is unshelved, the next OPEN succeeds without shelving interaction.

#### 6.1.4 New Logical Names for NFS and PATHWORKS Access

As just discussed, HSM supports two logical names that alter the behavior of opening a shelved file for NFS and PATHWORKS access support. These are:

- *HSM\$FAULT\_ON\_OPEN* - This logical name forces a file fault on an Open of a file for the processes listed in the equivalence name, and the open waits until the file fault is complete. Designed for use with the NFS server.
- *HSM\$FAULT\_AFTER\_OPEN* - This logical name forces a deferred file fault on the file when it is opened. If the fault completes within three seconds, the open completes successfully, otherwise it fails with "file busy", but initiates a "background" file fault. Repeated attempts to open the file will eventually succeed. Designed for use with the PATHWORKS server.

The default behavior is to perform no file fault on Open; rather the file fault occurs upon a read or write to the file.

Each logical name can take a list of process names to alter the behavior of file faults on open. For example:

```
$ DEFINE /SYSTEM HSM$FAULT_ON_OPEN "NFS$SERVER, USER_SERVER, SMITH"
```

The *HSM\$FAULT\_ON\_OPEN* can also be assigned to "HSM\$ALL", which will cause a file fault on open for all processes. This option is not allowed for *HSM\$FAULT\_AFTER\_OPEN*.

As these logicals are defined to allow NFS and PATHWORKS access, they are not recommended for use with other processes, since they will cause many more file faults than are actually needed in a normal OpenVMS environment. When used, the logicals must be system-wide, and should be defined identically on all nodes in the VMScluster™ environment.

These logical name assignments or lack thereof take effect immediately without the need to restart HSM.

**DFS, NFS, and PATHWORKS Access**  
**6.1 DFS, NFS and PATHWORKS Access Support**



# A

---

## HSM Basic Mode Installation Example

This appendix contains a sample HSM Basic mode installation on a VAX system. Upon completion of the actual installation, this example runs the IVP to determine whether the installation was correct.

---

### Note

---

**HSM must be shut down using \$ SMU SHUTDOWN on the installation system and all VMScluster™ nodes that use the installation system's system disk before you install the new version of the HSM software, otherwise the installation fails.**

---

```
$ @SYS$UPDATE:VMSINSTAL HSM022 DISK$:[DIR]
OpenVMS VAX Software Product Installation Procedure V6.1
It is 20-OCT-1999 at 14:12.
Enter a question mark (?) at any time for help.
* Are you satisfied with the backup of your system disk [YES]?
The following products will be processed:

HSM V3.0

Beginning installation of HSM V3.0 at 14:13

%VMSINSTAL - I - RESTORE, Restoring product save set A ...
%VMSINSTAL - I - RELMOVED, Product's release notes have been moved to
SYS$HELP.

*****
*           Hierarchical Storage Management (HSM)           *
*           for OpenVMS V3.0 Installation                     *
*                                                                 *
*   Copyright(c) Compaq computer Corporation 1998 - 1999.   *
*   All Rights Reserved. Unpublished rights reserved under the *
*   copyright laws of the United States.                       *
*****

*Do you want to purge files replaced by this installation [YES]?
*Do you want to run the IVP after the installation [YES]?

*** HSM License ***

Correct installation and operation of this software requires that one of the
following Product Authorization Keys (PAKs) reflecting your software license
be present on this system:

          HSM-SERVER
          HSM-USER

* Does this product have an authorization key registered and loaded [YES]?

*** HSM Mode ***
```

## HSM Basic Mode Installation Example

With this version, HSM can operate in one of two possible modes:

BASIC - The standalone HSM product which supports a limited number of near line and offline devices.

PLUS - The integrated HSM product, integrated with Media and Device Management Services (MDMS) which supports an expanded number of nearline and offline devices.

NOTE: MDMS or SLS V2.5B or newer must be installed before installing HSM PLUS mode. Also, once files are shelved in PLUS mode, you may \*not\* change back to BASIC mode.

BASIC or PLUS to select the mode in which you want HSM to operate. the mode to install [PLUS]: BASIC Installing HSM V3.0 BASIC mode

\*\*\* HSM Account \*\*\*

A privileged account named HSM\$SERVER will be created for use by HSM processes. This account will not allow interactive logins and the password will be automatically generated.

The installation procedure will not proceed until you enter a valid user identification code (UIC) for the HSM\$SERVER account. The UIC must be unique and within the SYSTEM group.

Enter the UIC to be used for HSM\$SERVER account [[1,22]]:

\*\*\* HSM Device \*\*\*

You will now be asked to enter a disk device specification to be used as a repository for HSM configuration databases and log files.

NOTE: \*\*\* This device must have at least 100000 free blocks and be available to all nodes in the cluster that will be running HSM \*\*\*

Enter the disk device to use for HSM files [SYS\$SYSDEVICE]:

```
HSM files will be placed at SYS$SYSDEVICE:[HSM$SERVER]
*Is this correct [YES]?
This installation creates an ACCOUNT named HSM$SERVER.
user record successfully added
identifier HSM$SERVER value [000001,000022]
added to rights database
This installation updates an ACCOUNT named HSM$SERVER.
user record(s) updated
This installation updates an ACCOUNT named HSM$SERVER.
user record(s) updated
This installation updates an ACCOUNT named HSM$SERVER.
user record(s) updated
This product creates system disk directory SYS$SYSDEVICE:[HSM$SERVER].
This product creates system disk directory SYS$SYSDEVICE:[HSM$SERVER.LOG].
This product creates system disk directory SYS$SYSDEVICE:[HSM$SERVER.
CATALOG].
This product creates system disk directory SYS$SYSDEVICE:[HSM$SERVER.MAN-
AGER].
Checking for DISKQUOTAs on device SYS$SYSDEVICE:
Restoring product save set B ...
```

The file SYS\$STARTUP:HSM\$STARTUP.COM contains specific commands needed to start the HSM Software. This file should not be modified. To start the software at system startup time, add the line

```
$ @SYS$STARTUP:HSM$STARTUP.COM
```

to the system startup procedure SYS\$MANAGER:SYSTARTUP\_VMS.COM

The HSM Catalog and SMU Databases must be created before running HSM. This procedure can create the HSM Catalog and SMU Databases automatically for you

## HSM Basic Mode Installation Example

as a post-installation task.

you want to run the database creation procedure [YES]?

The file SYS\$SYSTEM:SETFILENOSHELV.COM should be executed to set all system disk files as NON-SHELVABLE. This is important to preserve the integrity of your system disk.

This procedure can submit SETFILENOSHELV.COM to a batch execution queue for you as a post-installation task.

you want to submit SETFILENOSHELV.COM [YES]?

```
*****
*                               IMPORTANT                               *
*****
* When you upgrade to a new version of VMS you should invoke      *
* SYS$SYSTEM:SETFILENOSHELV.COM again. The installation of VMS    *
* does not and will not automatically set your system disk       *
* files to NON-SHELVABLE for you.                                  *
*****
```

No further questions will be asked during this installation.

The installation should take less than 10 minutes to complete.

This software is proprietary to and embodies the confidential technology of Compaq Computer Corporation. Possession, use, or copying of this software and media is authorized only pursuant to a valid written license from Compaq or an authorized sublicensor.

Restricted Rights: Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of DFARS 252.227-7013, or in FAR 52.227-19, or in FAR 52.227-14 Alt. III, as applicable.

Files will now be moved to their target directories...

executing HSM Post-Installation procedure

Creating HSM catalog

This command file creates the default HSM Catalog file.

The Catalog file is a directory of every file that was ever shelved.

It should be protected as such by controlling access to it.

You should only have to create the Catalog file once because that catalog will be used from that point on and contains a history of shelving activity and more importantly locates the offline data for the shelved files.

You should make sure that the Catalog file gets backed up on a regular basis since loss of this file could mean loss of the data for your shelved files.

```
HSM catalog created successfully
Creating HSM SMU database files
HSM SMU database files created successfully
setting HSM mode to BASIC SETFILENOSHELV (queue HSM$POLICY_NODE, entry 2)
holding until 10-OCT-1999 14:24
HSM post-installation procedure complete
HSM for OpenVMS V3.0 Installation Verification Procedure (IVP)
*** Copyright(c) Compaq Corporation 1998 - 1999.
starting HSM shelving facility on node NODE shelf
handler process started 000000AE policy execution process started 000000AF
Shelf Handler version - V2.x (BLxx), Oct 20 1999 Shelving Driver version
- V2.x (BLxx), Oct 20 1999 Policy Execution version - V2.x (BLxx), Oct 20
1999 Shelf Management version - V2.x (BLxx), Oct 20 1999
for OpenVMS is enabled for Shelving and Unshelving
history: Created: 10-JAN-1999 14:19:28.26
Revised: 10-JAN-1999 14:19:41.83
servers: Any cluster member
server: NODE
server: Disabled
logging: Audit
Error Exception mode: Basic
license :Unlimited
cache device _NODE$DKB300: created
shelf HSM$DEFAULT_SHELF updated
volume _NODE$DKB300: created
file SYS$COMMON:[SYSTEST.HSM]HSM_IVP1.TMP;1
shelved file SYS$COMMON:[SYSTEST.HSM]HSM_IVP1.TMP;1
unshelved file SYS$COMMON:[SYSTEST.HSM]HSM_IVP2.TMP;1 shelved
```

## HSM Basic Mode Installation Example

```
unshelving file NODE$DKB300:[SYSCOMMON.SYSTEST.HSM]HSM_IVP2.TMP;1
policy HSM$IVP_POLICY created
scheduled policy HSM$IVP_POLICY for volume _NODE$DKB300: was created on
server NODE _NODE$DKB300: (queue HSM$POLICY_NODE, entry 3) started on
HSM$POLICY_NODE waiting for HSM$IVP_POLICY to execute...
waiting for HSM$IVP_POLICY to execute...
file SYS$COMMON:[SYSTEST.HSM]HSM_IVP3.TMP;1
unshelved shutting down HSM shelving facility on node NODE
waiting for HSM to shutdown... waiting for HSM to shutdown...
```

The IVP for HSM V3.0 was successful! \*\*\*

```
Storage Management (HSM) for OpenVMS, Version V3.0
Compaq Computer Corporation 1998 - 1999. All Rights Reserved.
shelf handler process started 000000B2
policy execution process started 000000B3
for OpenVMS is enabled for Shelving and Unshelving
history:
Created:          20-OCT-1999 14:19:04.15
Revised:          20-OCT-1999 14:22:03.89
servers:          Any cluster member
server:           NODE
server:           Disabled
logging:          Audit
Error Exception  mode: Basic
license:          Unlimited
Software has been successfully started
  Installation of HSM V3.0 completed at 14:22
  VMSINSTAL procedure done at 14:22
```

# B

---

## HSM Plus Mode Installation Example

This appendix contains a sample HSM Plus mode installation on a VAX system. In this instance, HSM Version 3.0 is installed over an existing HSM environment. Upon completion of the actual installation, this example runs the IVP to determine whether the installation was correct.

---

### Note

**HSM must be shut down using \$ SMU SHUTDOWN on the installation system and all VMScluster™ nodes that use the installation system's system disk before you install the new version of the HSM software, otherwise, the installation fails.**

---

```
$ @SYS$UPDATE:VMSINSTAL HSM022 DISK$:[DIR]
OpenVMS VAX Software Product Installation Procedure V6.1
It is 20-OCT-1999 at 14:40.
Enter a question mark (?) at any time for help.
* Are you satisfied with the backup of your system disk [YES]?
The following products will be processed:
HSM V3.0
Beginning installation of HSM V3.0 at 14:40
%VMSINSTAL-I-RESTORE, Restoring product save set A ...
%VMSINSTAL-I-REMOVED, Product's release notes have been moved to SYS$HELP.
Restoring product save set A ...
Product's release notes have been moved to SYS$HELP.
*****
*           Hierarchical Storage Management (HSM)           *
*           for OpenVMS V3.0 Installation                     *
*                                                                 *
*   Copyright(c) Compaq Computer Corporation 1998,1999.   *
*   All Rights Reserved. Unpublished rights reserved under the *
*   copyright laws of the United States.                   *
*****
* Do you want to purge files replaced by this installation [YES]?
* Do you want to run the IVP after the installation [YES]?
*** HSM License ***
Correct installation and operation of this software requires that one
of the following Product Authorization Keys (PAKs) reflecting your
software license be present on this system:
HSM-SERVER
HSM-USER
* Does this product have an authorization key registered and loaded [YES]?
*** HSM Mode ***
With this version, HSM can operate in one of two possible modes:
BASIC - The standalone HSM product which supports a limited number of near-
line and offline devices.

PLUS - The integrated HSM product, integrated with Media and Device Manage-
ment Services (MDMS) which supports an expanded number of nearline and
offline devices.
NOTE: MDMS or SLS V2.5B or newer must be installed before installing HSM PLUS
mode. Also, once files are shelved in PLUS mode, you may *not* change back to
BASIC mode.
```

## HSM Plus Mode Installation Example

```
Enter BASIC or PLUS to select the mode in which you want HSM to operate.
* Enter the mode to install [PLUS]:
%HSM-I-MODE, Installing HSM V3.0 PLUS mode
%VMSINSTAL-I-ACCOUNT, This installation updates an ACCOUNT named HSM$SERVER.
%UAF-I-MDFYMSG, user record(s) updated
%VMSINSTAL-I-ACCOUNT, This installation updates an ACCOUNT named HSM$SERVER.
%UAF-I-MDFYMSG, user record(s) updated
%VMSINSTAL-I-ACCOUNT, This installation updates an ACCOUNT named HSM$SERVER.
%UAF-I-MDFYMSG, user record(s) updated
%HSM-I-CHKQUO, Checking for DISKQUOTAs on device SYS$SYSDEVICE:
%VMSINSTAL-I-RESTORE, Restoring product save set B ...
%HSM-I-CHKMRU, Checking version of Media Robot Utility (MRD$SHR.EXE)
%HSM-I-CHKHSD, Checking for updated version of HSDRIVER
The file SYS$STARTUP:HSM$STARTUP.COM contains specific commands
needed to start the HSM Software. This file should not be modified.
To start the software at system startup time, add the line
$ @SYS$STARTUP:HSM$STARTUP.COM to the system startup procedure SYS$MAN-
AGER:SYSTARTUP_VMS.COM
```

The file SYS\$SYSTEM:SETFILENOSHELV.COM should be executed to set all system disk files as NON-SHELVABLE. This is important to preserve the integrity of your system disk. This procedure can submit SETFILENOSHELV.COM to a batch execution queue for you as a post-installation task.

```
* Do you want to submit SETFILENOSHELV.COM [YES]? NO
*****
*
*           IMPORTANT
*
*****
* When you upgrade to a new version of VMS you should invoke
* SYS$SYSTEM:SETFILENOSHELV.COM again. The installation of VMS
* does not and will not automatically set your system disk
* files to NON-SHELVABLE for you.
*****
%HSM-I-DONEASK, No further questions will be asked during this installation.
-HSM-I-DONEASK, The installation should take less than 10 minutes to complete.
This software is proprietary to and embodies the confidential technology of
Compaq Computer Corporation. Possession, use, or copying of this
software and media is authorized only pursuant to a valid written
license from Compaq or an authorized sublicensor. Restricted Rights: Use,
duplication, or disclosure by the U.S. Government is subject to restrictions
as set forth in subparagraph (c)(1)(ii) of DFARS 252.227-7013, or in FAR
52.227-19, or in FAR 52.227-14 Alt. III as applicable.
%VMSINSTAL-I-MOVEFILES, Files will now be moved to their target directories...
```

```
%HSMPOST-I-START, executing HSM Post-Installation procedure
%HSMPOST-I-SMUDBCONVERT, converting SMU databases
%SMUDBCONVERT-I-ARCHIVE, converting SMU archive database
%SMUDBCONVERT-I-CURRENT, SMU archive database conversion not required
%SMUDBCONVERT-I-CACHE, converting SMU cache database
%SMUDBCONVERT-I-CURRENT, SMU cache database conversion not required
%SMUDBCONVERT-I-CONFIG, converting SMU shelf database
%SMUDBCONVERT-S-CONFIG, SMU shelf database converted
%SMUDBCONVERT-I-DEVICE, converting SMU device database
%SMUDBCONVERT-S-DEVICE, SMU device database converted
%SMUDBCONVERT-I-POLICY, converting SMU policy database
%SMUDBCONVERT-S-POLICY, SMU policy database converted
%SMUDBCONVERT-I-VOLUME, converting SMU volume database
%SMUDBCONVERT-S-VOLUME, SMU volume database converted
%HSMPOST-S-SMUDBCONVERT, SMU databases successfully converted
%HSMPOST-I-CATCONVERT, converting default catalog
%HSMPOST-I-CATCURRENT, catalog conversion not required
%HSMPOST-I-CATATTRUPD, updating catalog file attributes
%HSMPOST-S-CATATTRUPD, catalog file attributes updated
%HSMPOST-I-SETMODE, setting HSM mode to PLUS
%HSMPOST-I-DONE, HSM post-installation procedure complete
*** HSM for OpenVMS V3.0 Installation Verification Procedure (IVP) ***
Copyright(c)Compaq Computer Corporation 1998,1999
%HSM-I-IVPSTART, starting HSM shelving facility on node NODE
%SMU-S-SHP_STARTED, shelf handler process started 000000C3
%SMU-S-PEP_STARTED, policy execution process started 000000C4
```

## HSM Plus Mode Installation Example

```
HSM Shelf Handler version - V2.x (BLxx), Oct 20 1999
HSM Shelving Driver version - V2.x (BLxx), Oct 20 1999
HSM Policy Execution version - V2.x (BLxx), Oct 20 1999
HSM Shelf Management version - V2.x (BLxx), Oct 20 1999
HSM for OpenVMS is enabled for Shelving and Unshelving
Facility history:
Created:          20-OCT-1999 14:52:28.26
Revised:         20-OCT-1999 14:52:41.83
Designated servers: Any cluster member
Current server:  NODE
Catalog server:  Disabled
Event logging:   Audit Error Exception
HSM mode:       Basic
Remaining license: Unlimited
%SMU-I-CACHE_CREATED, cache device _NODE$DKB300: created
%SMU-I-SHELF_UPDATED, shelf HSM$DEFAULT_SHELF updated
%SMU-I-VOLUME_CREATED, volume _NODE$DKB300: created
%SHELVE-S-SHELVED, file SYS$COMMON:[SYSTEST.HSM]HSM_IVP1.TMP;1 shelved
%UNSHELVE-S-UNSHELVED, file SYS$COMMON:[SYSTEST.HSM]HSM_IVP1.TMP;1 unshelved
%SHELVE-S-SHELVED, file SYS$COMMON:[SYSTEST.HSM]HSM_IVP2.TMP;1 shelved
%HSM-I-UNSHLVPRG, unshelving file _NODE$DKB300:[SYS$COMMON.SYST-
EST.HSM]HSM_IVP2.TMP;1
%SMU-I-POLICY_CREATED, policy HSM$IVP_POLICY created
%SMU-I-SCHED_CREATED, scheduled policy HSM$IVP_POLICY for volume
_NODE$DKB300: was created on server NODE Job _NODE$DKB300: (queue
HSM$POLICY_NODE, entry 5) started on HSM$POLICY_NODE
%HSM-I-IVPWAIT, waiting for HSM$IVP_POLICY to execute...
%HSM-I-IVPWAIT, waiting for HSM$IVP_POLICY to execute...
%UNSHELVE-S-UNSHELVED, file SYS$COMMON:[SYSTEST.HSM]HSM_IVP3.TMP;1 unshelved
%HSM-I-IVPSHUT, shutting down HSM shelving facility on node NODE
%HSM-I-IVPSHUTWAIT, waiting for HSM to shutdown...
%HSM-I-IVPSHUTWAIT, waiting for HSM to shutdown...

*** The IVP for HSM V3.0 was successful! ***
Hierarchical Storage Management (HSM) for OpenVMS, Version V3.0
Copyright Compaq Computer Corporation 1998 - 1999. All Rights Reserved.
%SMU-S-SHP_STARTED, shelf handler process started 00000103
%SMU-S-PEP_STARTED, policy execution process started 00000104
HSM for OpenVMS is enabled for Shelving and Unshelving
Facility history:
Created:          20-OCT-1999 14:51:04.15
Revised:         20-OCT-1999 14:54:03.89
Designated servers: Any cluster member
Current server:  NODE
Catalog server:  Disabled
Event logging:   Audit
Error Exception
HSM mode:       Basic
Remaining license: Unlimited
HSM Software has been successfully started
Installation of HSM V3.0 completed at 14:55
VMSINSTAL procedure done at 14:55
```

**HSM Plus Mode Installation Example**



---

## HSM Logicals

### C.1 HSM Logical Names

The following is the list of logical names entered into the logical name tables when HSM software is installed. These names are defined by the product's startup file. They are automatically entered into these logical name tables whenever the system reboots or whenever the software is invoked.

```
(LNM$PROCESS_TABLE)
(LNM$JOB_8CE40840)
(LNM$GROUP_000107)
(LNM$SYSTEM_TABLE)
"HSM$CATALOG" = "DISK$USER1:[HSM$SERVER.CATALOG]"
"HSM$FAULT_AFTER_OPEN" = "PCFS_SERVER, PWRK$LMSRV"
"HSM$FAULT_ON_OPEN" = "NFS$SERVER"
"HSM$LOG" = "DISK$USER1:[HSM$SERVER.LOG]"
"HSM$MANAGER" = "DISK$USER1:[HSM$SERVER.MANAGER]"
"HSM$PEP_REQUEST" = "MBA454:"
"HSM$PEP_RESPONSE" = "MBA455:"
"HSM$PEP_TERMINATION" = "MBA427:"
"HSM$REPACK_DURATION" = "0"
"HSM$ROOT" = "DISK$AIM2:[HSM$ROOT.]"
"HSM$SHP_REQUEST" = "MBA451:"
"HSM$SHP_RESPONSE" = "MBA452:"
"HSM$SHP_URGENT" = "MBA450:"
(DECW$LOGICAL_NAMES)
```

## C.1 HSM Logical Names

---

## HSM Files

### D.1 HSM File Names

The HSM installation procedure creates several files on your system. Table D-1 lists and describes the files installed on server and client nodes. File names with an asterisk (\*) preceding them are installed only on server nodes.

**Table D-1 HSM Files Installed**

Name	Description
HSM\$SERVER:directory	
CATALOG.DIR	Directory where the HSM catalog databases are kept
LOG.DIR	Directory where HSM audit and error logs are kept
MANAGER.DIR	Directory where the HSM management databases are kept
SETFILENOSHELV.LOG	Shows which files were set non- shelvable directory
HSM\$SERVER.CATALOG:directory	
HSM\$CATALOG.SYS	This is the default catalog database. The user may define other catalogs that would be placed in this directory.
HSM\$SERVER.MANAGER:_directory	
HSM\$ARCHIVE_DB.SMU	Contains the archive class database
HSM\$CACHE_DB.SMU;1	Contains HSM cache database
HSM\$CONFIG_DB.SMU;1	Contains system configuration database
HSM\$DEVICE_DB.SMU;1	Contains HSM device database
HSM\$POLICY_DB.SMU;1	Contains HSM policy database
HSM\$SHELF_LOG_CONFIG.TXT;1	
HSM\$SHP_REQUEST.SYS;1	Keeps a record of the shelf-handler requests for the cluster
HSM\$SHP_REQUEST_SYS;1	Keeps a record of the shelf_handler requests for the node
HSM\$VOLUME_DB.SMU;1	Contains HSM Volume database.
HSM\$SERVER.LOG:_directory	

## HSM Files

### D.1 HSM File Names

**Table D–1 HSM Files Installed**

<b>Name</b>	<b>Description</b>
HSM\$PEP_AUDIT.LOG	Event audit log of HSM policy execution
HSM\$PEP_ERROR.LOG;1	Error log of HSM policy execution
HSM\$SHELF_HANDLER.LOG;1	Log file of shelf handler process
HSM\$SHELF_PEP.LOG;1	Log file of Policy execution process
HSM\$SHP_AUDIT.LOG;1	Event audit log of shelf handler activity
HSM\$SHP_ERROR.LOG;1	Error log of shelf handler activity

# E

---

## MDMS Files and Logical Names

The HSM/MDMS installation procedure installs files and defines logical names on your system. This appendix lists the names of the files installed and logical names that are added to the system logical name -table. Section E.1 lists names of the files installed and Section E.2 lists the logical names that are added to the system logical names table.

---

### Note

**They are automatically entered into these logical name tables whenever the system reboots or whenever the software is invoked. The LNM\$JOB table also contains logical names that are defined when a user logs in to a system running MDMS software.**

---

### E.1 MDMS File Names

Table E-1 contains the names of all MDMS files created on the system after MDMS V3.0 is successfully installed.

---

### Note

**Some files may not be installed depending on the options you select.**

---

**Table E-1 MDMS Installed Files**

---

<b>File Name</b>	<b>File Name</b>
	<b>SY\$HELP</b>
MDMS.HLP	MDMSV30.RELEASE_NOTES
MDMSV30.RELEASE_NOTES.PS	
	<b>SY\$LIBRARY</b>
MDM\$SHR.EXE	
	<b>SY\$MESSAGE</b>
MDM\$MSG.EXE	RDF\$MSG.EXE
	<b>SY\$MANAGER</b>
MDM\$\$SYSTARTUP.COM	MDM\$\$SYSTARTUP.TEMPLATE
	<b>SY\$\$SHARE</b>
MDM\$SHR.EXE	MRD\$RTL.EXE

---

## MDMS Files and Logical Names

### E.1 MDMS File Names

**Table E-1 MDMS Installed Files**

<b>File Name</b>	<b>File Name</b>
	<b>SYS\$STARTUP</b>
MDM\$\$SHUTDOWN.COM MDM\$\$UNINSTALL.COM	MDM\$\$STARTUP.COM
	<b>SYS\$SYSTEM</b>
MDM\$\$SERVER.EXE, MDM\$\$CONVERT_V3_TO_V2.EXE, MDM\$\$CONVERT_V2_TO_V3.EXE	MDM\$\$DCL.EXE MDM\$\$SERVER.EXE
	<b>SYS\$TEST</b>
MDM\$\$IVP.COM	
	<b>MDM\$\$ROOT:[DATABASE]</b>
MDM\$\$DOMAIN_DB.DAT MDM\$\$GROUP_DB.DAT MDM\$\$LOCATION_DB.DAT MDM\$\$MEDIA_DB.DAT MDM\$\$POOL_DB.DAT	MDM\$\$DRIVE_DB.DAT MDM\$\$JUKEBOX_DB.DAT MDM\$\$MAGAZINE_DB.DAT MDM\$\$NODE_DB.DAT MDM\$\$VOLUME_DB.DAT
	<b>MDM\$\$ROOT:[GUL.VMS]</b>
ALPDCL01_071.A-DCX_AXPEXE ALPACRT08_071.A-DCX_AXPEXE ALPSYSB02_071.A-DCX_AXPEXE DEC-AXPVMS-JAVA-V0101-6- 1.PCSI_DCX_AXPEXE MDMS.INI MDMS_GUI_HELP.HTML	ALPBASE02_071.A-DCX_AXPEXE ALPSYSA02_071.A-DCX_AXPEXE ALPTHREADS_03071.A-DCX_AXPEXE DEC-AXPVMS-VMS712_PTHREADS-V0100-- 4.PCSI-DCX_AXPEXE MDMS.ZIP SYMANTEC.ZIP
	<b>MDM\$\$ROOT:[GUL.VMS.GRAPHICS]</b>
CONFWIZ4.GIF DOMAIN2.GIF GROUP.GIF LOCATION.GIF MEDIATYPE.GIF POOL.GIF SERVJUKE.GIF VOLROT.GIF	CONFWIZ5.GIF DRIVE.GIF JUKEBOX.GIF MAGAZINE.GIF NODE.GIF REQUESTS.GIF SPLASH.GIF VOLUME.GIF
	<b>MDM\$\$ROOT:[GUL.ALPHA_NT]</b>
JRE116ALPHANT.EXE	SETUP_ALPHA_NT.EXE
	<b>MDM\$\$ROOT:[GUI.WINTEL]</b>
JRE117WINTEL.EXE	SETUP_INTEL.EXE
	<b>MDM\$\$ROOT:[PATCHES.ALPHA]</b>
ALPY2K02_062.A	ALPY2K02_062.CVRLET_TXT
	<b>MDM\$\$ROOT:[PATCHES.VAX]</b>

**MDMS Files and Logical Names**  
**E.1 MDMS File Names**

**Table E-1 MDMS Installed Files**

File Name	File Name
VAXLIBR06_070.A	VAXLIBR06_070.B
VAXLIBR06_070.C	VAXLIBR06_070.CVRLET_TXT
VAXLIBR06_070.D	VAXLIBR06_070.E
VAXLIBR06_070.F	VAXLIBR06_070.G
<b>MDMS\$ROOT:[SYSTEM]</b>	
MDMS\$ALL_OTHER_DB.FDL	MDMS\$CONVERT_V3_TO_V2.COM
MDMS\$CONVERT_V2_TO_V3.COM	MDMS\$COPY_DB_FILES.COM
MDMS\$CREATE_DB_FILES.COM	MDMS\$REPLACE_SLS_LOADER.COM
MDMS\$START_GUI.COM	MDMS\$VOLUME_DB.FDL
<b>MDMS\$ROOT:[TTI_RDEV.ALPHA]</b>	
CONFIG_EXAMPLE.DAT	RDALLOCATE.COM
RDCDRIVER_AXP.OPT	RDCDRIVER_AXP61.OPT
RDCDRIVER_AXP70.OPT	RDCLIENT_SHUTDOWN.COM
RDCLIENT_STARTUP.COM	RDCTL_EXE.OPT
RDEV_AXP70.OLB	RDEV_AXP61.OLB
RDDEALLOCATE.COM	RDEV_BUILD.COM
RDEV_CHECK_STATE.COM	RDEV_CLIENT.COM
RDEV_CONFIGURE.COM	RDEV_COPYRIGHT.COM
RDEV_GATHER.COM	RDEV_LOGICALS.COM
RDEV_RMT_SHUTDOWN.COM	RDEV_RMT_STARTUP.COM
RDEV_SERVER.COM	RDEV_UCXSTUB_AXP61.OLB
RDEV_UCXSTUB_AXP70.OLB	RDFREE.COM
RDF_UCX_RSHD_STARTUP.COM	RDLOG.COM
RDRMT_STARTUP.COM	RDSERVER_SHUTDOWN.COM
RDSERVER_STARTUP.COM	RDSHOW.COM
RLINK_AXP.OPT	RMTSRV_AXP.OPT
SHRLINK_AXP.OPT	
<b>MDMS\$ROOT:[TTI_RDEV.VAX]</b>	
CONFIG_EXAMPLE.DAT	DRVRDEFS_V62.STB
DRVRDEFS_V62.STB	DRVRDEFS_V62.STB
DRVRDEFS_V62.STB	DRVRDEFS_V62.STB
DRVRDEFS_V62.STB	DRVRDEFS_V62.STB
RDALLOCATE.COM	RDCDRIVER_V62.EXE
RDCDRIVER_V62.STB	RDCDRIVER_V62.STB
RDCDRIVER_V62.STB	RDCDRIVER_V62.STB
RDCDRIVER_V62.STB	RDCDRIVER_V62.STB
RDCDRIVER_V62.STB	RDCDRIVER_V62.STB
RDCDRIVER_V62.STB	RDCDRIVER_VAX.OPT
RDCLIENT_SHUTDOWN.COM	RDCLIENT_STARTUP.COM
RDCLIENT_V62.EXE	RDCONTROL_V62.EXE
RDCTL_EXE.OPT	RDDEALLOCATE.COM
RDEV_BUILD.COM	RDEV_CHECK_STATE.COM
RDEV_CLIENT.COM	RDEV_CONFIGURE.COM
RDEV_CONTROL_SHR_V62.EXE	RDEV_COPYRIGHT.COM
RDEV_GATHER.COM	RDEV_LOGICALS.COM
RDEV_RMT_SHUTDOWN.COM	RDEV_RMT_STARTUP.COM
RDEV_SERVER.COM	RDEV_UCXSTUB_VAX.OLB
RDEV_VAX.OLB	SHRLINK_VAX.OPT
RDF_UCX_RSHD_STARTUP.COM	RDFREE.COM
RDLOG.COM	RDLOG.COM
RDRMT_STARTUP.COM	RDSERVER_SHUTDOWN.COM
RDSERVER_STARTUP.COM	RDSERVER_V62.EXE
RDSHOW.COM	RLINK_VAX.OPT
RMTSRV_V62.EXE	RMTSRV_VAX.OPT

## MDMS Files and Logical Names

### E.2 MDMS Logical Names

## E.2 MDMS Logical Names

When the MDMS installation procedure is complete, logical names are entered into the system logical name table and stored in the startup file, SYS\$STARTUP:MDMS\$SYSTARTUP.COM. They are automatically entered into the system logical name table whenever the system reboots or whenever MDMS is started with this command:

```
SYS$STARTUP:MDMS$STARTUP.COM.
```

Table E-2 describes the logical names in the system table

**Table E-2 MDMS Logical Names**

Logical Name	Definition and Description
MDMS\$DATABASE_LOCATION	This logical points to the location of the MDMS database files.
MDMS\$DATABASE_SERVERS	<p>This logical name is a comma separated list of full node names of potential database servers. When a server starts up, it uses this logical to see if it may be a database server. If the server finds its node name in the list, it tries to become the database server. If the server does not find itself in the list, it then knows that it is not a database server but it then tries to communicate with the node in the list to find the database server. The name of the node defines how the two server communicate with each other.</p> <p>This list of names must be DECnet, DECnet-Plus, or TCP/IP node names. They can be a mix of different protocols or the same. For example the node list could look like this:</p> <pre>NODE1,NODE2.SITE.INC.COM,INC:.SITE.NODE3</pre> <p>The above example shows that to communicate with:</p> <ul style="list-style-type: none"> <li>• NODE1 use DECnet</li> <li>• NODE2 use DECnet-Plus</li> <li>• NODE3 use TCP/IP</li> </ul>
MDMS\$LOGFILE_LOCATION	This logical name points to the location of the MDMS log files.
MDMS\$ROOT	This logical name points to the device and directory of the root for the MDMS files.
MDMS\$SUPPORT_PRE_V3	This logical name enables or disables support of SLS/MDMS V2.9x remote servers. When this logical is TRUE, a SLS/MDMS V2.9x client can communicate with a MDMS V3.0 server. If you do not have any SLS/MDMS V2.9x clients, define this logical as FALSE.



**Table E–2 MDMS Logical Names**

<b>Logical Name</b>	<b>Definition and Description</b>
MDMSSCHEDULED_ACTIVITIES_START_HOUR	<p>This logical name is the start hour (0-23) for the following scheduled activities:</p> <ul style="list-style-type: none"> <li>• Deallocate volumes that have passed their scratch date</li> <li>• Free volumes that have passed their freed date</li> <li>• Scheduled magazine rotation</li> <li>• Scheduled volume rotation</li> </ul> <p>If this logical is not defined, these activities are scheduled for 1 AM.</p>
MDMSSYSTEM	<p>This logical name points to the location of MDMS utilities.</p>
MDMS\$TCPIP_SND_PORTS	<p>This logical name is the range of port numbers for outgoing TCP/IP connections. The defaults are ports 601 to 1023.</p>
MDMS\$VERSION3	<p>This logical name is TRUE when ABS and HSM should use MDMS V3.0. If ABS and HSM is not suppose to use MDMS V3.0 this logical will not be defined. The MDMS server should not be running if ABS and HSM is not suppose to use MDMS V3.</p>



---

## MDMS V3.0 Rights and Privileges

This appendix has explanation for MDMS user rights and privileges.

Every MDMS user/potential user will be assigned zero or more rights in their SYSUAF file. These rights will be examined on a per-command basis to determine whether a user has sufficient privilege to issue a command. The command is accepted for processing only if the user has sufficient privilege. In case the user has no rights the **entire command** is rejected. Each right has a name in the following format:

MDMS\_rightname.

Rights are looked-up on the *client OpenVMS node* that receives the request, as such each user must have an account on the *client node*.

- in the case of DCL commands and applications, this would be the node at which the request is issued.
- from the GUI, it is the node whose MDMS\$SERVER process receives the request. The rights are translated into a bitmap and passed to the database server for validation.

### F.1 MDMS Rights - Types

MDMS has the following rights:

- High-level rights
- Low level rights
- ABS rights

#### F.1.1 High Level Rights

These rights are designed for a specific kind of user, to support a typical MDMS installation, and make the assignments of rights to users easy. The **three** high-level MDMS rights, the default right, administrator right and the additional right are described in Table F-1

# MDMS V3.0 Rights and Privileges

## F.1 MDMS Rights - Types

**Table F–1 High Level Rights**

High level right	Allows Privileges for...
MDMS_USER	A non-privileged MDMS user who wants to use MDMS to manage tape volumes for BACKUP, ABS or HSM purposes
MDMS_APPLICATION	Main applications that MDMS supports - ABS and HSM server processes
MDMS_OPERATOR	The user responsible for day-to-day operations in the MDMS environment.
Default Right A <i>hidden</i> high-level right	The low level rights contained in it, for users with no MDMS rights. They are additional to any specific rights a user may have been granted. It is the <i>default right</i> . By default, there are no low-level rights assigned to the <i>default right</i> . If rights are assigned to the default right, they apply to all users in the system, since every user is effectively granted the default right. The default right can be disabled with the MDMS_NO_DEFAULT identifier in a user's UAF file.
MDMS_ALL_RIGHTS Administrator Right	A system administrator to perform any operation. MDMS_ALL_RIGHTS can be enabled with the OpenVMS SYSPRV privilege.
Additional Right	All operations.
MDMS_USER	A non-privileged MDMS user who wants to use MDMS to manage tape volumes for BACKUP, ABS or HSM purposes
MDMS_APPLICATION	Main applications MDMS supports - ABS and HSM server processes
MDMS_OPERATOR	User responsible for day-to-day operations in the MDMS environment.
Default Right A <i>hidden</i> high-level right	The low level rights contained in it, for users with no MDMS rights. They are additional to any specific rights a user may have been granted. It is the <i>default right</i> . By default, there are no low-level rights assigned to the <i>default right</i> . If rights are assigned to the default right, they apply to all users in the system, since every user is effectively granted the default right. The default right can be disabled with the MDMS_NO_DEFAULT identifier in a user's UAF file.
MDMS_ALL_RIGHTS Administrator Right	A system administrator to perform any operation. MDMS_ALL_RIGHTS can be enabled with the OpenVMS SYSPRV privilege.
Additional Right	All operations.

You can disable the mapping of SYSPRV to MDMS\_ALL\_RIGHTS using a SET DOMAIN command

### F.1.2 Low-level rights

Each command or command option will be tagged with one or more low-level rights that are needed to perform the operation. Where more than one right is specified, the command indicates the appropriate combination of rights needed. The MDMS administrator can assign a set of *low-level rights* to each high-level right. The administrator can then simply assign the high-level right to the user.

MDMS translates the high-level right to respective low-level rights while processing a com-

## MDMS V3.0 Rights and Privileges

### F.1 MDMS Rights - Types

mand. For additional flexibility, the user can be assigned a combination of high-level and low-level rights. The result will be a sum of all rights defined.

The default set of mapping of high-level to low-level rights will be assigned at installation (by default) and stored in the domain record. However, the MDMS administrator can change these assignments by using the **SET DOMAIN** command.

---

#### Note

---

**By default a user has no rights and cannot use MDMS. The system administrator can change the ‘rightless’ user’s rights using a SET DOMAIN command. These rights can again be disabled on a per-user basis as needed.**

---

The low-level rights are designed to be applied to operations. A given command, with a given set of qualifiers or options, requires the sum of the rights needed for the command **and all supplied options**. In many cases some options require more privilege than the command, and that higher privilege will be applied to the entire command if those options are specified.

The following are usable low level rights:

**Table F–2 Low Level Rights**

---

<b>Low Level Right Name</b>	<b>Allows Privilege to:</b>
MDMS_ALL_RIGHTS	Enable all operations (This right is for the system administrator.)
MDMS_ALLOCATE_ALL	Allocate volumes or drives for any user
MDMS_ALLOCATE_OWN	Allocate a drive and become “owner”
MDMS_ALLOCATE_POOL	Allocate a volume from an authorized pool
MDMS_ASSIST	Request operator assistance on calls
MDMS_BIND_ALL	Bind any volumes together in a volume set
MDMS_BIND_OWN	Bind owned volumes together in a volume set
MDMS_CANCEL_ALL	Cancel any request
MDMS_CANCEL_OWN	Cancel one’s own requests
MDMS_CANCEL_POOL	Cancel a request of a member of the same pool
MDMS_CREATE_ALL	Create any database object
MDMS_CREATE_POOL	Create volumes in a pool authorized to user
MDMS_DEALLOCATE_ALL	Deallocate volumes for any user
MDMS_DEALLOCATE_OWN	Deallocate an owned volume or drive
MDMS_DELETE_ALL	Delete any database object
MDMS_DELETE_POOL	Delete volumes in pool authorized to user
MDMS_INITIALIZE_ALL	Initialize any volume
MDMS_INITIALIZE_POOL	Initialize a volume in pool authorized to user
MDMS_INVENTORY_ALL	Perform inventory on any jukebox

---

## MDMS V3.0 Rights and Privileges

### F.1 MDMS Rights - Types

**Table F–2 Low Level Rights**

<b>Low Level Right Name</b>	<b>Allows Privilege to:</b>
MDMS_LOAD_ALL	Load any volumes including scratch volumes
MDMS_LOAD_OWN	Load owned volumes into drives
MDMS_LOAD_POOL	Load volumes in pool authorized to user
MDMS_LOAD_SCRATCH	Load scratch volumes
MDMS_MOVE_ALL	Move any volume
MDMS_MOVE_OWN	Move owned volumes
MDMS_MOVE_POOL	Move volumes in pool authorized to user
MDMS_SET_ALL	SET (modify) any database object
MDMS_SET_PROTECTED	SET internal MDMS attributes in an object
MDMS_SET_OWN	SET (modify) volumes allocated to user
MDMS_SET_POOL	SET (modify) volumes in pool authorized to user
MDMS_SET_RIGHTS	SET (modify) rights in the domain
MDMS_SHOW_ALL	SHOW or REPORT any database object
MDMS_SHOW_OWN	SHOW or REPORT volumes allocated to user
MDMS_SHOW_POOL	SHOW or REPORT volumes in pool authorized to user
MDMS_SHOW_RIGHTS	Show rights with a SHOW DOMAIN/FULL
MDMS_UNBIND_ALL	Unbind any volumes
MDMS_UNBIND_OWN	Unbind owned objects from a volume set
MDMS_UNLOAD_ALL	Unload any volumes or drives
MDMS_UNLOAD_OWN	Unload volumes allocated to user from a drive
MDMS_UNLOAD_POOL	Unload volumes in pool authorized to user

### F.1.3 ABS Rights

MDMS can be defined to recognize ABS rights and map them to MDMS rights. This capability is disabled by default and can be enabled with a SET DOMAIN command. The exact mapping for ABS rights is as in Table F–3:

**Table F–3 ABS Rights**

<b>ABS RIGHTS</b>	<b>MDMS RIGHTS</b>
ABS_BACKUP_JOB	MDMS_USER
ABS_BYPASS	MDMS_ALL_RIGHTS
ABS_CREATE_EXECUTION_ENV	MDMS_CREATE_ALL MDMS_SET_ALL MDMS_SHOW_ALL

## MDMS V3.0 Rights and Privileges F.2 Default High-Level to Low-Level Mapping

**Table F–3 ABS Rights**

ABS RIGHTS	MDMS RIGHTS
ABS_CREATE_REMOTE_JOB	None
ABS_CREATE_STORAGE_CLASS	MDMS_CREATE_ALL MDMS_SET_ALL MDMS_SHOW_ALL
ABS_LOOKUP_ALL	None
ABS_SHOW_ALL	MDMS_SHOW_ALL

## F.2 Default High-Level to Low-Level Mapping

This section defines the default high to low-level mapping for each high-level right.

### F.2.1 MDMS\_USER:

**Table F–4 MDMS\_USER Rights**

MDMS User...	Allows privilege to...
MDMS_ALLOCATE_OWN	Allocate a drive and become “owner”
MDMS_ALLOCATE_POOL	Allocate a volume from a pool authorized to user
MDMS_ASSIST	Request operator assistance on calls
MDMS_BIND_OWN	Bind owned volumes together in a volume set
MDMS_CANCEL_OWN	Cancel one’s own requests
MDMS_DEALLOCATE_OWN	Deallocate an owned volume or drive
MDMS_LOAD_OWN	Load owned volumes into drives
MDMS_SHOW_OWN	SHOW or REPORT volumes allocated to user
MDMS_SHOW_POOL	SHOW or REPORT volumes in pool authorized to user
MDMS_UNBIND_OWN	Unbind owned objects from a volume set
MDMS_UNLOAD_OWN	Unload volumes allocated to user from a drive

## MDMS V3.0 Rights and Privileges

### F.2 Default High-Level to Low-Level Mapping

#### F.2.2 MDMS\_OPERATOR Rights:

Table F-5 Operator Rights

MDMS Operator...	Allows privilege to...
MDMS_ALLOCATE_ALL	Allocate volumes or drives for any user
MDMS_ASSIST	Request operator assistance on calls
MDMS_BIND_ALL	Bind any volumes together in a volume set
MDMS_CANCEL_ALL	Cancel any request
MDMS_CREATE_POOL	Create volumes in a pool authorized to user
MDMS_DEALLOCATE_ALL	Deallocate volumes for any user
MDMS_DELETE_POOL	Delete volumes in pool authorized to user
MDMS_INITIALIZE_ALL	Initialize any volume
MDMS_INVENTORY_ALL	Perform inventory on any jukebox
MDMS_LOAD_ALL	Load any volumes including scratch volumes
MDMS_MOVE_ALL	Move any volume
MDMS_SET_OWN	SET (modify) volumes allocated to user
MDMS_SET_POOL	SET (modify) volumes in pool authorized to user
MDMS_SHOW_ALL	SHOW or REPORT any database object
MDMS_SHOW_RIGHTS	Show rights with SHOW DOMAIN/FULL
MDMS_UNBIND_ALL	Unbind any volumes
MDMS_UNLOAD_ALL	Unload any volumes or drives

##### F.2.2.1 Domain Commands for Mapping Privileges

```
SET DOMAIN
/[NO]ABS_RIGHTS
/ADD
/[NO]APPLICATION_RIGHTS[=(right[,...])]
/[NO]DEFAULT_RIGHTS[=(right[,...])]
/[NO]OPERATOR_RIGHTS[=(right[,...])]
/REMOVE
/[NO]SYSPRV
/[NO]USER_RIGHTS[=(right[,...])]
```

##### Example F-1

```
SET DOMAIN /OPERATOR_RIGHTS=MDMS_SET_PROTECTED /ADD
```

This command adds the MDMS\_SET\_PROTECTED right to the operator rights list.



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