

# IMM Virtual Server

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# IMM Virtual Server

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## Contents

Overview .....	3
Requirements .....	3
Access the Server Files.....	4
Planning.....	4
Methodology .....	4
Download.....	4
Validation.....	4
Run Checksum .....	5
Virtual Server Configuration .....	6
Import.....	6
Server Initialization .....	6
Protection.....	7
Rename/Add to Domain.....	7
Windows Update Service.....	7
Time Settings.....	7
Supplemental Instructions .....	8
Retain the OVA File .....	8
FTP Issues .....	9
Test the Download Server .....	9
Test your Access .....	11
"ImmTest" worked but the product download credentials don't.....	12
Still not working?.....	12
I can't make FTP work, what now?.....	12
Alternative #1 .....	12
Alternative #2.....	12
Appendix A: Importing Examples .....	13
VMware ESXi.....	13
Microsoft Hyper-V .....	13
Support.....	14

# IMM Virtual Server

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## Overview

This document will guide you in obtaining your new virtual server.



Read this document in its entirety before starting the process and if you have any questions ask your Project Team before continuing.

All steps in this document are "product generic". An additional document with "product specific" steps has also been provided, which this procedure calls for in the Server Creation section.

Consider security impacts on the process as you review the document. Antivirus, antimalware, firewalls, proxy services, etc., all may have a direct effect on your ability to complete these tasks.

## Requirements

To complete this process you need the following:

- This generic server download document
- The product specific supplemental instructions document
- An internet connection able to download 10-30GB files
- Enough available disk space to download and then unzip the server (so 2x the download size)
- The user name and password to download the files
- The decryption key for the server zip file
- A zip program that supports AES256 encryption/decryption (Windows built in tools do not).
- A server virtualization environment (VMware ESXi or Microsoft Hyper-V) with enough resources to run the server

If you do not have one or more of these, please contact your Project Team.

# IMM Virtual Server

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## Access the Server Files

### Planning

The file you are going to download will be 10-30 GB in size (size dependent on product). Typical download times are in the 2-5hr range, depending on your Internet connection.

Plan the download timing accordingly.

### Methodology

We recommend using FTP to download your server. FTP is better suited to this process due to the very large file sizes - it is more efficient and has the ability to restart interrupted transfers.

If your FI does not allow FTP, the file may be downloaded over HTTPS, using the URL below and the same user/password provided to you by your Project Manager

HTTPS URL: <https://immftp.exavault.com/login>

#### **If you use the HTTPS web page download method:**

- 1) Do not use the "Download All" button or check multiple files to download. The server OVA is too large and the process will fail.
- 2) Ensure you "unblock" all files after downloading them. Using files that are blocked by Windows security will fail.

## Download

- 1) Download the files to a machine which:
  - a. Will not go to sleep during the process
  - b. Has adequate space to store the server file
- 2) Download the files using the FTP (or HTTPS) URL and the User/Password which was provided by your Project Team.
  - a. Your download will include these files:
    - i. Checksums.xml
    - ii. ChecksumVerify.exe
    - iii. <ProductName>.zip
- 3) Wait until all files have finished transferring before proceeding

Problems connecting to or downloading the file? See the [FTP troubleshooting](#) section in this document.

## Validation

# IMM Virtual Server

Verification of the file is done through Checksum validation and the program “ChecksumVerify.exe” has been provided with the download to facilitate this process.

This step is critical to guaranteeing the success of your installation. Make sure you get a green result before continuing.



Do not use a UNC path to access the server file and run the Checksums validation as this may invalidate the process. Use a mapped drive if necessary.

## Run Checksum

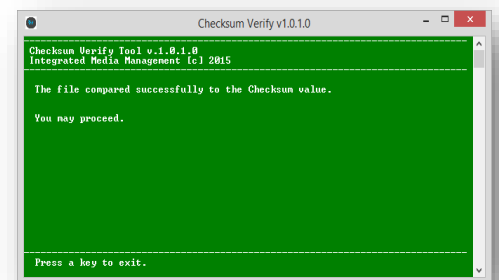
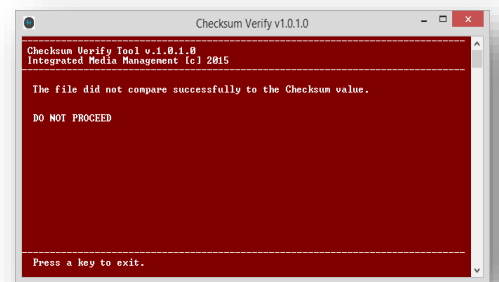
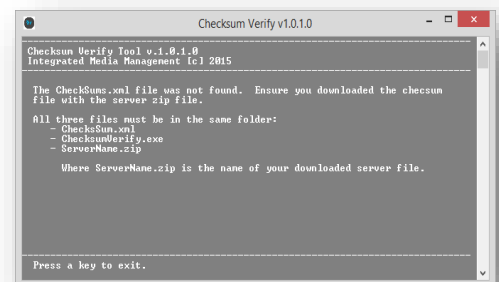
Verify you have these three named files in the same folder.

- 1) CheckSums.xml
- 2) ChecksumVerify.exe
- 3) “ServerName”.zip (where “ServerName” is the name of the server file you downloaded)

Double-click ChecksumVerify.exe to run

- 1) Wait for the results. You will get one of the following screens:

Gray = It can't find the checksum.xml file. Go back to step 1) and make sure all three files are in the same folder.



Red = **The checksum didn't verify correctly.** Either the file didn't finish transferring or it was changed. Do Not Continue. Re-download the files and try again.

Green = The checksum did verify and you may continue.

# IMM Virtual Server

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## Virtual Server Configuration

It is important that you are able to correctly manage and optimize your virtual server and host environment. The virtual server is provided to you with baseline virtual server defaults, which may or may not be the "best" configuration for your environment.

The following items should be reviewed to ensure you set them correctly for your environment:

- Network adapter type
- SCSI adapter type
- VM version (if VMware)
- VMware Tools version (if VMware)
- Gen1 machine (if Hyper-V)
- Reserved resources vs Not Reserved

This list is not all inclusive. It is intended as a prompt for you to review the environment and ensure it is correct for you.

If you need assistance with your VM management please contact the company that provides your virtual environment support.

## Import

You will need enough working disk space to extract the zipped virtual server as well as enough datastore space to import the new virtual server into your virtual server host.

- 1) Extract the zipped OVA file
  - a. Use 7-zip to ensure compatibility with the decryption algorithms. 7-zip is open source and free for commercial use. <http://www.7-zip.org/>
    - i. If you use a different zip program, you may have decryption issues. You will have to support those and work directly with the software publisher to resolve them.
  - b. Decryption key is provided by your Project Team
- 2) Import the virtual server (OVA file).
  - a. Use your preferred method to deploy a virtual server OVA.
    - i. See [Appendix A](#) for importing examples. If you need assistance with VMware or Microsoft virtual server importing please contact your VMware or Microsoft service provider.
  - b. Import only 1 server of each type you are deploying. If you are licensed for more than one of each, you will "clone" them after the first one is fully installed and tested.

## Server Initialization

- 1) Power on the new virtual server
- 2) Follow the on screen instructions to activate the sysprep'd Microsoft Server
  - a. Input your Microsoft license key.
    - i. The virtual server does not come with a Windows license. If you need to acquire one, contact your Microsoft License provider/vendor.
  - b. Input the new Local Administrator password (make sure you record this as it is needed in our installation process)

# IMM Virtual Server

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## Protection

Before making any changes to this server, ensure that it is backed up to protect your progress.

- 1) Create a Snapshot (or Microsoft equivalent) named "Before Rename"
  - a. Shut down the server
  - b. Create the snapshot (do not create this with the server powered on)

Retain this snapshot until the server is fully configured and tested.

## Rename/Add to Domain

The server needs to be in the same Domain as your workstations or some features will not work.

- 1) Rename the server
  - a. Give it a unique name that appropriately reflects how you want the "Live" server named. (the "Test" instance will be cloned from this one later)
  - b. Add it to your domain

## Windows Update Service

If the OVA server contains Windows Server 2016 or later, the Windows Update Service may have been disabled as part of our publishing process to prevent installation issues. Ensure you re-enable it per your policy.

It is important that Windows Updates are not scheduled to run during the Servers operational hours.

## Time Settings

If your group policy does not automatically apply time zone / daylight savings settings to new systems, ensure that these settings are set correctly on the server.

# IMM Virtual Server

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## Supplemental Instructions

Please refer to the supplemental instructions document provided for additional product-specific install steps and perform these steps at this time. If you do not have the product specific supplemental instruction document, please contact your project team for assistance.



Do not continue without performing the product specific steps in the supplemental instruction document. The server will not function without those instructions being completed.

## Retain the OVA File

The source OVA is your backup in case you need to re-import the baseline server as part of this process. It can also be important to have this file for testing when diagnosing issues in the installation process.

The source OVA file should be retained until such time you have a fully installed, tested and operational server.

Once you are live on the server, it is recommended that you power down the server, export it to OVA and then retain that copy as your failsafe.



# IMM Virtual Server

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## FTP Issues

It is not uncommon that security of Financial Institutions blocks FTP access for most internal workstations. Please talk to your internal security staff to enable FTP access so you can complete this task. We have provided connections for both FTP and SFTP in case one is preferable to your security policies.

Before continuing, verify that the ports used for FTP are open/allowed. Depending on which protocol you are going to use, the ports are as follows.

FTP = 21 or SFTP = 22

## Test the Download Server

You can verify the server is up and functional by using one of the numerous online FTP test sites. This eliminates your own security setup (for now) in the process. An example test site is listed below.

- 1) [https://www.wormly.com/test\\_ftp\\_server](https://www.wormly.com/test_ftp_server)
- 2) Enter the fields in as follows:

**Test an FTP Server**

FTP Test Tool

**FTP Server**  
immftp.exavault.com  
Enter an IP address or a fully qualified hostname

**Use SSL?**  
 Yes  No

**Username**  
ImmTest  
Optional - will attempt to login with this username

**Password**  
ImmTest  
Optional.

**Test this FTP server >>**

- 3) Select the Test this FTP server >> button

# IMM Virtual Server

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It will return a number of FTP messages ending in something like below (may not be exactly what you get) showing the final success status:

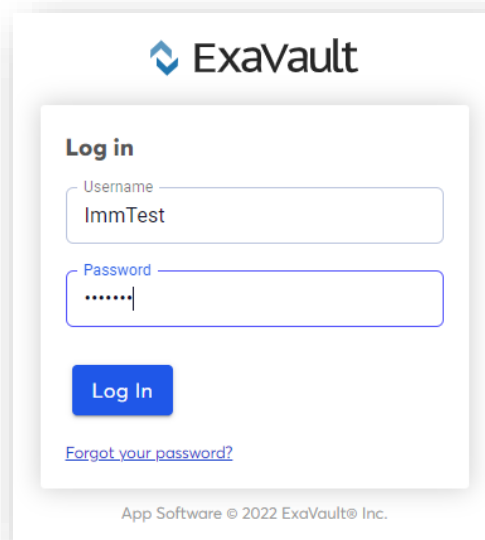
```
Resolving hostname...
Starting FTP Test...
* Rebuilt URL to: ftp://immftp.exavault.com/
* Trying 67.208.93.227...
* Connected to immftp.exavault.com (67.208.93.227) port 21 (#0)
< 220 ProFTPD 1.3.5 Server (EV) [67.208.93.227]
> USER ImmTest
< 331 Password required for ImmTest
> PASS ImmTest
< 230 User ImmTest logged in
> PWD
< 257 "/" is the current directory
* Entry path is '/'
> EPSV
* Connect data stream passively
* ftp_perform ends with SECONDARY: 0
< 229 Entering Extended Passive Mode (|||62813|)
* Trying 67.208.93.227...
* Connecting to 67.208.93.227 (67.208.93.227) port 62813
* Connected to immftp.exavault.com (67.208.93.227) port 21 (#0)
> TYPE A
< 200 Type set to A
> LIST
< 150 Opening ASCII mode data connection for file list
* Maxdownload = -1
* Remembering we are in dir ""
< 226 Transfer complete
* Connection #0 to host immftp.exavault.com left intact
FTP Test completed.
```

# IMM Virtual Server

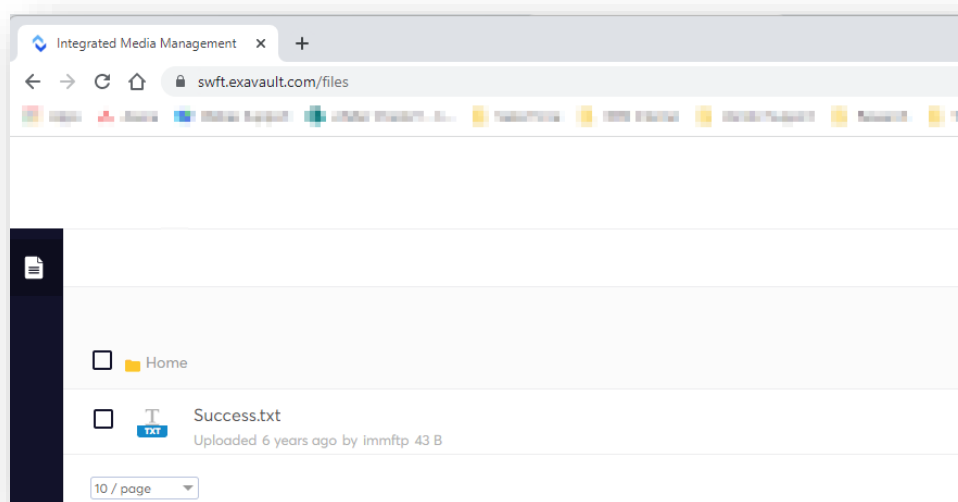
## Test your Access

After showing that the server is up in the previous sections test, you can test your own connectivity directly in a browser window (IE is shown here).

- 1) Open your browser and type in the URL: `ftp://immftp.exavault.com`
- 2) You will be prompted to log in
  - a. Enter user: `ImmTest`
  - b. Enter pw: `ImmTest`
  - c. Select the Log In button



You will receive a directory listing something like below if you can complete the connection. There is one file in the folder called "Success.txt".



At this point if you did not get either the logon screen or the resulting folder display, the issue is security on your end, because the previous Download Server Test demonstrated that the server was up and functional.

# IMM Virtual Server

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## "ImmTest" worked but the product download credentials don't.

Test your product download credentials via the HTTPS site. If they fail to log on, let your Project Manager know so they can troubleshoot the log on issue.

## Still not working?

Virtually 100% of reported FTP issues come from CU Security and can only be resolved on your end. The tests in the previous sections should delineate where the issue is.

## I can't make FTP work, what now?

### Alternative #1

Use the HTTPS URL to download the files.

If you do this ensure that the files are "unblocked" before using them. Check each files "properties" to ensure they are not blocked by windows.

### Alternative #2

Use the FTP method from a different location that is not blocking FTP. Please note the security warning below.



**You are not permitted to decrypt the server's zip file outside of your institution's secure environment.** Ensure that you bring the file inside your secured network prior to decrypting it and that it never exists outside your FI as an unencrypted file, either on a computer or any type of media.

# IMM Virtual Server

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## Appendix A: Importing Examples

Our virtual server files are exported from a VMware ESXi system, which makes it a simpler process to get them into a VMware host.

### VMware ESXi

Example, when using the vSphere v6.0 client:

- 1) Select the File menu
- 2) Choose Deploy OVF Template
- 3) Browse for the OVA file
- 4) Follow the wizard directions. Use the options that are correct for your environment but do not change the server resources to be under the required specs for the product (review the System Requirements documentation).

### Microsoft Hyper-V

IMM Virtual Server OVAs can be converted to 'Gen1' Hyper-V format.

Microsoft provides conversion information on their website, or there are various 3rd party alternatives like StarWind 'V2V Converter' which provide this functionality.

For assistance with these processes, contact the vendor for the software you decide to use.

[Download Instructions](#)

# IMM Virtual Server

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## Support

If you have trouble completing this procedure, contact your Project Team for assistance.