



# Quick Start Guide - CD/DVD

*BackupAssist Quick Start Guide — Installation, Configuration and Setup*

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## 1. Introduction

BackupAssist is specifically designed to take the hassle out of CD and DVD backups by:

1. Automatically starting backups when you want them to be started.
2. Providing quick and easy setup for a range of disc rotation strategies (for rewritable media).
3. Automatically emailing reminders to change the disc and perform drive maintenance so you can stick to your strategy
4. Automatically emailing backup reports so you know when backups have been successful, and when they haven't.

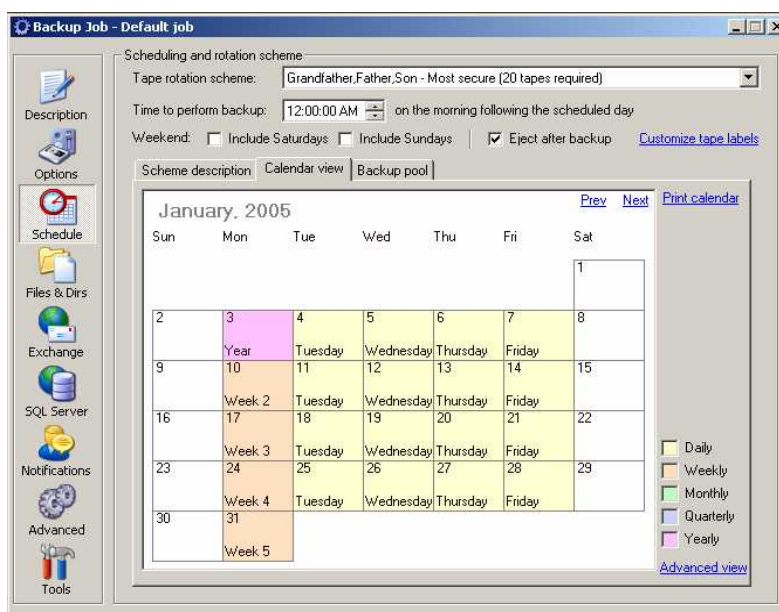


Figure 1: BackupAssist Administrative Console View

Using BackupAssist will save you and your organization time and money, and more importantly, better protect you from the disaster of data loss.

### Before you begin

1. Make sure that your CD or DVD drive is installed and has been detected by Windows. Most often this Windows will automatically detect and install drivers for your CD or DVD drive, but if not, you may need to install the drivers that came with the product. If you have been using other third party backup software, you may need to uninstall and reinstall these drivers.
2. Make sure that you don't have any other backup software installed on the machine (other than NTBackup and BackupAssist!). Other backup software can interfere with the operation of BackupAssist.
3. Make sure that you do not already have tasks scheduled to perform backups through the Windows Task Scheduler. Existing backups that are scheduled to run at the same time as BackupAssist will interfere with BackupAssist.



## 2. Installation and Configuration Wizard

The installation process is simplified through the Install Wizard and Configuration Wizard. Installation and setup should take no longer than 15 minutes.

To set up BackupAssist on your system:

1. Download the setup program from the BackupAssist website.
2. Run the setup program, and install BackupAssist
3. Run the BackupAssist Administration Console. As this is the first time the program has been run, the BackupAssist Configuration Wizard will appear, and guide you through the initial configuration.
4. After initial configuration is complete, perform a test backup to ensure that the backup is performed properly on your hardware.



Figure 2: BackupAssist Configuration Wizard

## Recommended Configuration

### 2.1 Backup Scheme Selection

The scheme you select depends on the media you have available. RW DVDs are very affordable now and provide a great solution for your backup needs. If you are using write once media it's probably best to use the 'Basic scheme' for now.

We recommend storing weekly, monthly, quarterly and yearly discs offsite to protect against robbery/fire. We also recommend that quarterly and yearly discs are archived (not overwritten, but taken out of the media pool) to provide permanent data storage. You might want to use write once media for archived backups.

<p style="text-align: center;"><b>Basic Scheme</b></p> <p><b>For:</b> small organisations who need a basic backup.  <b>Advantages:</b> only 5 backup discs required, or one per day for write once discs.  <b>Disadvantages:</b> backup pool is limited, and data loss must be detected within 5 days for the backups to be useful. If using write once discs then this won't be a problem, but it will require a lot more CDs/DVDs.</p> <p><b>Backup pool:</b>          - Monday, Tuesday, Wednesday, Thursday, Friday</p>	<p style="text-align: center;"><b>Intermediate</b></p> <p><b>For:</b> schools, universities and organisations who need a basic backup and a range of archives.  <b>Advantages:</b> good archiving of backups, whilst only requiring 10 backup discs  <b>Disadvantages:</b> backup pool is limited to the last quarter.</p> <p><b>Backup pool:</b>          - Quarter (first Monday of each quarter)          - Month (first Monday of each month)          - Week 2, Week 3, Week 4, Week 5 (respective Mondays of month)          - Tuesday, Wednesday, Thursday, Friday</p>
<p style="text-align: center;"><b>Professional</b></p> <p><b>For:</b> professional organisations needing a powerful backup scheme.  <b>Advantages:</b> great range of backups, with yearly and quarterly archives  <b>Disadvantages:</b> requires 14 discs, plus one per year for archiving.</p> <p><b>Backup pool:</b>          - Yearly (first Monday of each year)          - Quarter 2, Quarter 3, Quarter 4 (first Monday of each quarter)          - Month 2, Month 3 (first Monday of months in quarter)          - Week 2, Week 3, Week 4, Week 5 (respective Mondays of month)          - Tuesday, Wednesday, Thursday, Friday</p>	<p style="text-align: center;"><b>Grandfather/Father/Son</b></p> <p><b>For:</b> professional organisations needing a powerful backup scheme.  <b>Advantages:</b> excellent archiving of backups, yearly and monthly archives  <b>Disadvantages:</b> requires 20 discs (22 including weekends), plus one per year for archiving.</p> <p><b>Backup pool:</b>          - Yearly (first Monday of each year)          - February, March, April, May, June, July, August, September, October, November, December, (first Monday of month)          - Week 2, Week 3, Week 4, Week 5, (respective Mondays of month)          - Tuesday, Wednesday, Thursday, Friday, plus optional Saturday and Sunday tapes</p>



### 2.2 Backup media options

Most organizations run their backups from the file server. We recommend backing up your most critical files, together with the system state (or registry).

The working directory should be a directory that is dedicated to BackupAssist and should not be used for any other purpose. If you are using a mix of RW and R media, leave the option to erase the disc on, as it will have no effect on read only discs. We also suggest using the compression option to maximize the space you have available for backups.

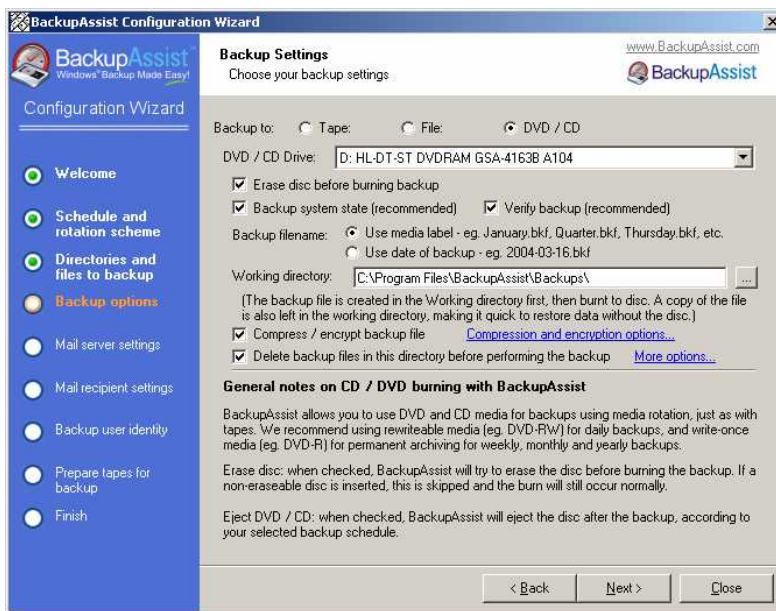


Figure 3: Backup settings

### 2.3 Backup Notification and Alert

We strongly recommended using the email feature. All that is required is access to a SMTP server.

The system administrator should receive backup report emails to monitor backup procedure. This means that if a backup error occurs, the administrator will be informed of it! If no email is received, then the administrator knows that the machine was down at the time (crash / power failure), or some other problem prevented a backup from being performed, and an investigation is required.

We also recommend that reminder emails be sent to the appropriate person (secretary / office administrator) to minimize the possibility of human error in the backup process.

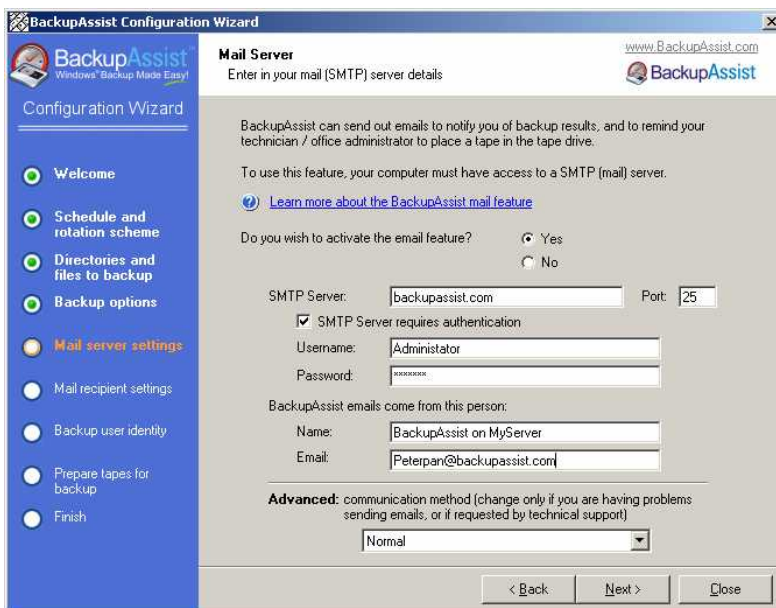


Figure 4: Email notification set up



## 2.4 Backup User Identity

Most installations can run the backup process as the local administrator. However, if you are backing up files from another machine (e.g., from a shared directory on another file server), then you will need to ensure that the backup runs under the identity of a user that has permissions to access those files.

Most commonly, running as the Administrator of your domain will suffice.

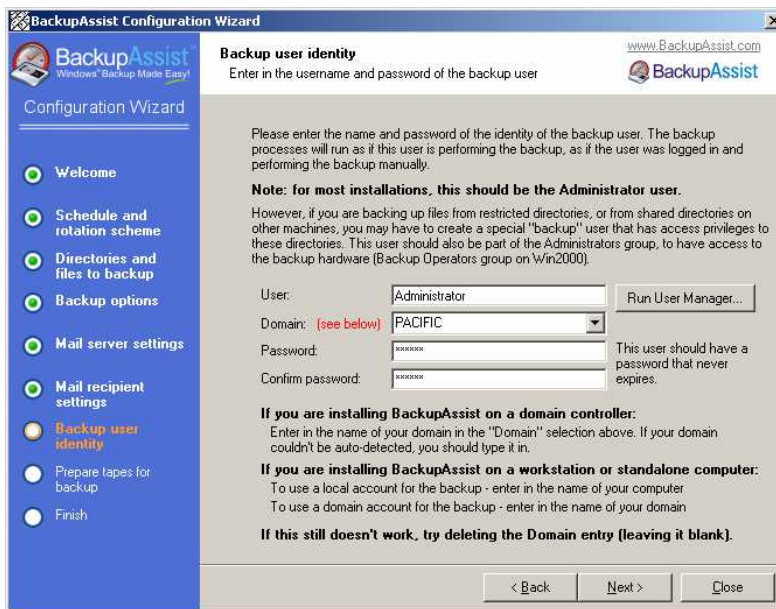


Figure 5: Choosing the Backup User Identity

### 3. What should I do after configuration?

#### 3.1 Modify timing and perform a test backup

By default backups will be performed at midnight each night. You may wish to change this to an earlier time particularly if your backups take a long time to run. This setting can be modified in the schedule tab.

Perform a test backup by selecting the Tools tab in the Administration Console, and clicking the "Perform Test Backup" link.

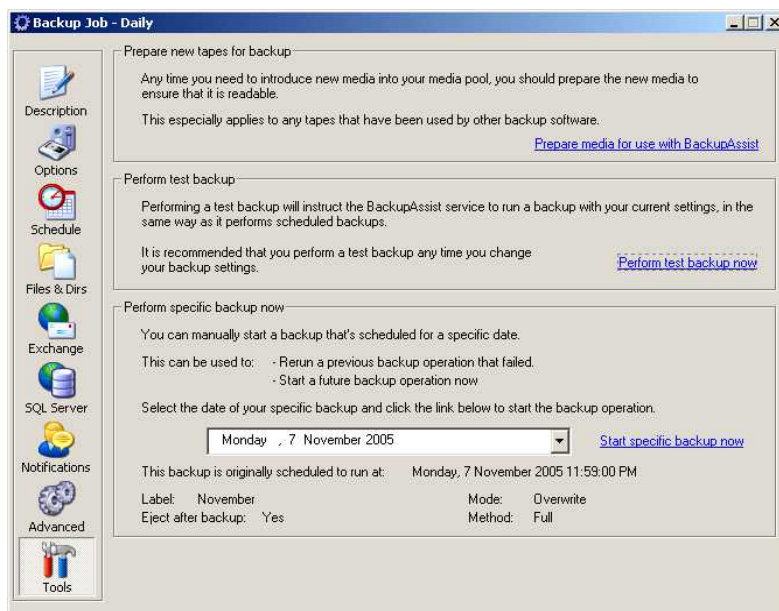


Figure 7: Test Backup

**Please Note:** test backups can take a long time depending on the amount of data backed up and the speed of your tape drive. If you don't have the time to do a full backup now, you can go to the Files & Dirs tab and select a small sample folder to backup instead. Remember to set the Files & Dirs back to normal after the test backup is complete!

#### 3.2 Label your media pool

If you are using re-writable media, the labels that you should physically write onto your discs can be obtained from the "Backup Pool" tab when viewing Schemes in the Administration Console. That way when you receive a reminder message you will be able to identify the right disc to put in. Otherwise, just write the dates of the backup onto the disc as you write to them.



Figure 8: Media labels for your tapes

### 3.3 Set up and test notification emails

Reminder messages are sent at midday by default, you might want to change this setting, depending on your office hours. The time for reminder messages can be modified in the Notifications tab.

Once you have set up the notifications to your satisfaction, click on 'Send test reminder notifications now' and make sure that you receive the test email.

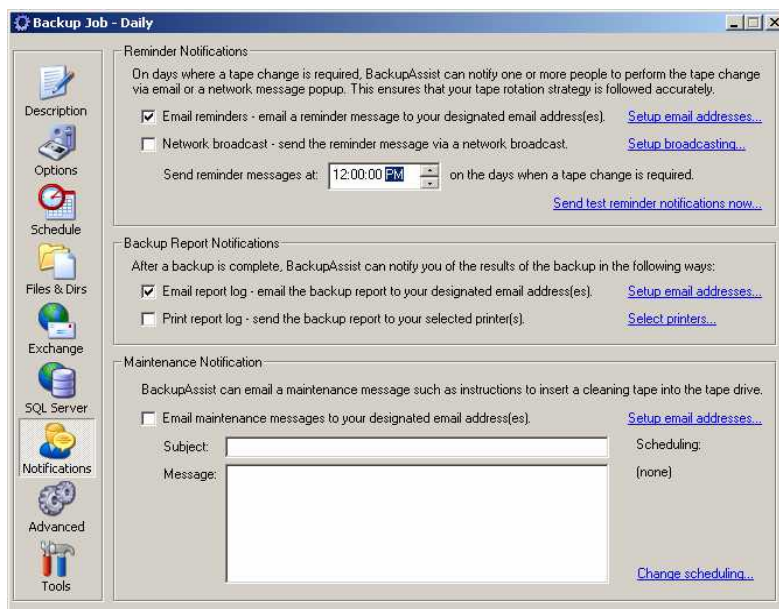


Figure 9: Notification emails

One of the key advantages of using BackupAssist over scheduled tasks is the automatic emailing of backup reports. This enables the administrator to examine the status of each backup, without manually having to check the logs.

The administrator should review each report for any errors.

If a report is not emailed then one of the following occurred:

- The tape backup machine was down (crash / power failure)
- The SMTP (mail) server was down, or could not be reached, to send the status email
- BackupAssist failed to run the backup as scheduled

In this scenario, the administrator should investigate the backup logs to see whether the backup was run or not, and take corrective action if necessary.

### What do I do now?

You're finished! All that remains is to keep an eye on the report emails to make sure the backups are working, and to change the discs when you get the reminder emails. We would suggest looking at the first couple of backup log files that are sent the email to make sure that everything that you need up is being backed up.

If you have any problems, issues or questions on BackupAssist first have a look at the FAQ on the last page of this guide. If that doesn't address your concern, feel free to email [support@backupassist.com](mailto:support@backupassist.com), and we'll do our best to help you out.

We hope you enjoy many years of trouble free backups with BackupAssist... Windows backup made easy!



## 4. Frequently Asked Questions

### What format will my backup media be in?

**Standard Windows backup format.** BackupAssist uses Windows' Backup utility to perform the backups, so your tapes will be in the standard backup format. No proprietary software is needed to use the tapes.

### How do I restore data?

Simply restore data from your tapes using the Windows Backup program, as you would do if the backups were performed manually. No special processes are required.

**Please note:** restoration should be performed by qualified technical personnel.

### I need to run additional tasks before and after the backup - can BackupAssist™ do this?

**Yes** - absolutely. We provide the facility to run programs before and after the backup - they're called the Pre-backup script and Post-backup script. You can set them up in the Advanced section of the BackupAssist™ Administration Console.

### I need to map network drives for a backup. Where do I set up the mapped drives?

Go to the Advanced tab in the Administration Console. There you can add drives to map for the backup operation. You can also choose to import the currently mapped drives - this will add all the currently mapped drives into the list.

**Note:** to ensure that a mapped drive can be backed up, you must add it to the list.

### What should a system administrator do once BackupAssist™ is set up?

There's not much that a system administrator should do, as the idea of BackupAssist™ is to make the backup process an automatic, self-managing process. However, it is necessary that the system administrator check the emailed backup reports to ensure that the backup is performed successfully each night.

### What types of backup does it support?

**Full, Differential, Copy, Daily and Incremental** backups are supported.

### Do I have to use one of the predefined schemes?

**No** - Custom schemes can be used if you need the flexibility of designing your own backup schedule and rotation strategy.

### What level of support does BackupAssist provide for open files?

The level of open file support (OFS) provided in BackupAssist varies based on operating system:

Operating system	OFS on local disks	OFS on network disks
Windows 2003 Server	Full support	Basic for all network drives
Windows XP Pro	Full support	Basic for all network drives
Windows 2000	Basic support	Basic for mapped network drives
Windows NT	Basic support	Basic for mapped network drives

**Full support** - complete backup of open files, including all locked files, maintaining data consistency

**Basic support** - open files locked with a shared lock or no lock are copied and backed up after the main backup. Files with an exclusive lock cannot be copied or backed up. Exclusively locked files are typically SQL Server or Exchange data files. SQL Server can be backed up using our optional add-on module.