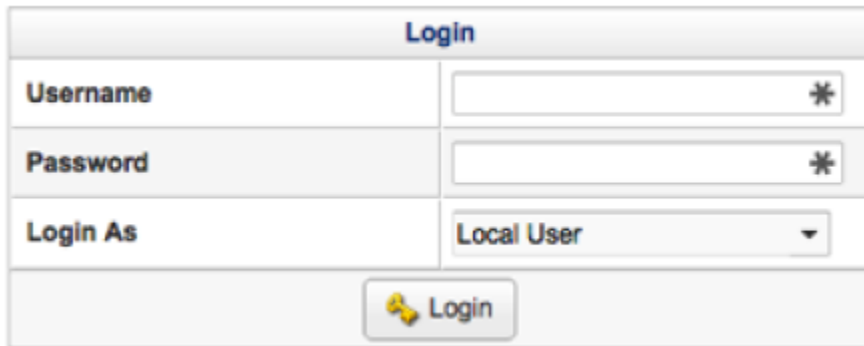


R1Soft Backup: Getting Started

- Login to R1Soft Server
- Adding a new server to be backed up
- Creating a Disk Safe
- Creating a backup policy

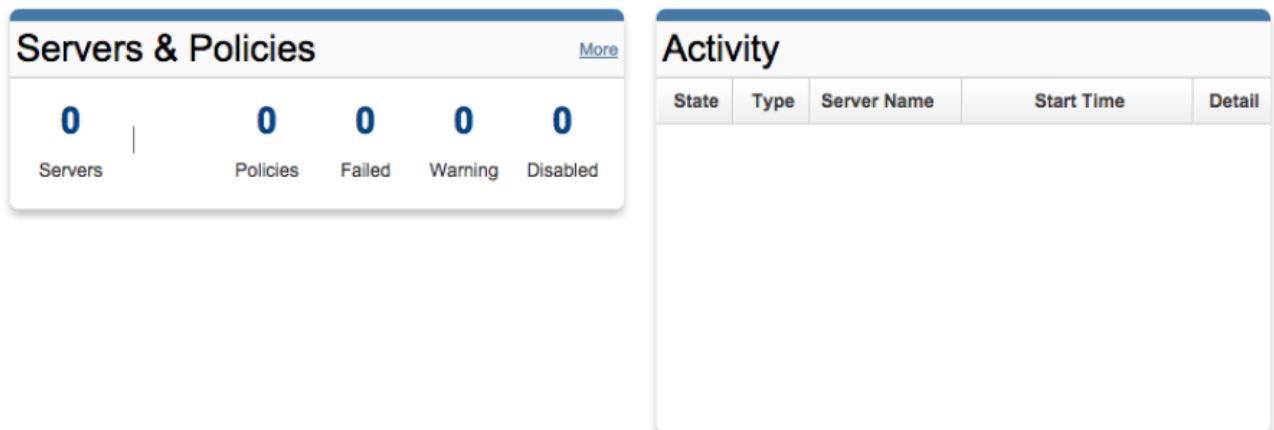
Login to R1Soft Server

1. Login to backup portal with the credentials in your welcome email.



The login form is titled "Login" in blue text. It contains three input fields: "Username" with a text input and a "Show/Hide" icon (an eye with a slash), "Password" with a text input and a "Show/Hide" icon, and "Login As" with a dropdown menu currently showing "Local User". Below these fields is a "Login" button with a yellow key icon.

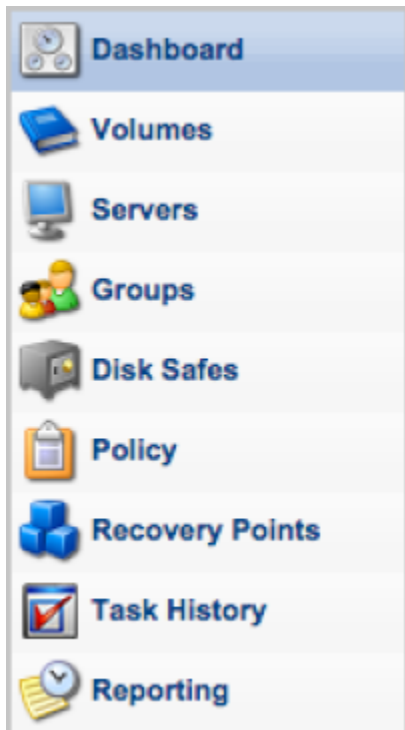
2. You start at the Dashboard, which shows your current servers, policies and recent activity. If this are just setting up your first server this will all be empty:



The dashboard is divided into two main sections. The left section, titled "Servers & Policies" with a "More" link, displays five statistics: 0 Servers, 0 Policies, 0 Failed, 0 Warning, and 0 Disabled. The right section, titled "Activity", contains a table with the following headers: State, Type, Server Name, Start Time, and Detail. The table body is currently empty.

Adding a new server to be backed up

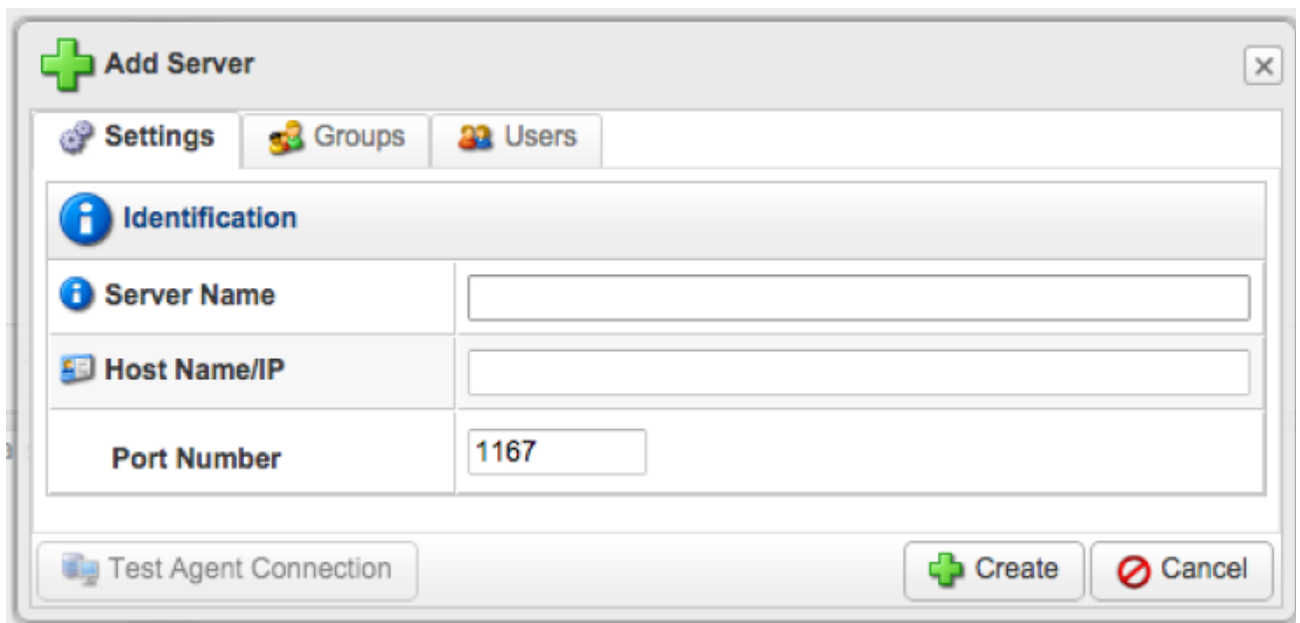
1. First step is to add your newly setup server, so click on the Servers option in the bottom left:



2. The top left section of the screen will then change to show Server Options, select Add Server:



3. You will now add the server's name and IP address:



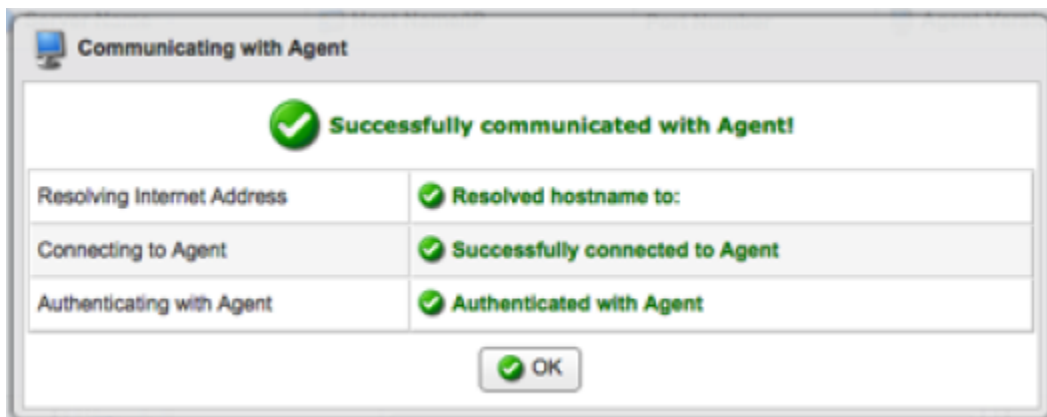
The 'Add Server' dialog box features a title bar with a green plus icon and a close button. Below the title bar are three tabs: 'Settings' (selected), 'Groups', and 'Users'. The 'Settings' tab contains an 'Identification' section with three input fields: 'Server Name', 'Host Name/IP', and 'Port Number'. The 'Port Number' field is pre-filled with '1167'. At the bottom left is a 'Test Agent Connection' button, and at the bottom right are 'Create' and 'Cancel' buttons.

Identification	
Server Name	<input type="text"/>
Host Name/IP	<input type="text"/>
Port Number	1167

Test Agent Connection Create Cancel

Enter Server Name, this can be a domain name or just a name for you to reference this server. Host Name/IP should be the IP address of the server you just installed the R1Soft Agent Software.

4. Test the connection by pressing 'Test Agent Connection' button in the bottom left of the Add Server box:



The 'Communicating with Agent' dialog box shows a success message at the top: 'Successfully communicated with Agent!'. Below this is a table with three rows, each showing a step in the process and its status. At the bottom is an 'OK' button.

Resolving Internet Address	✓ Resolved hostname to:
Connecting to Agent	✓ Successfully connected to Agent
Authenticating with Agent	✓ Authenticated with Agent

OK

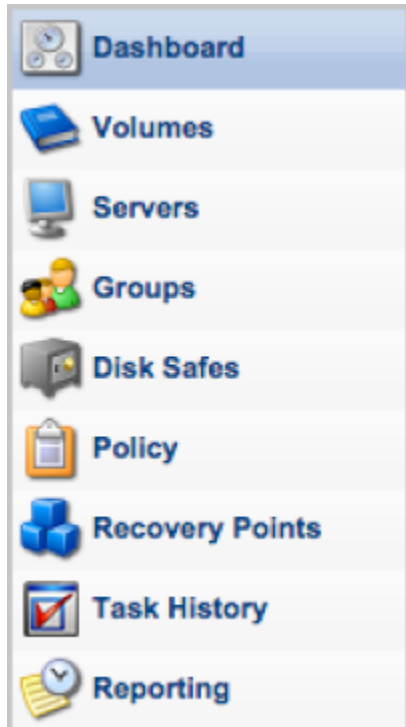
If everything is setup correctly, then you'll see confirmation of each step like above. If not, then stop and contact support and they will assist you. Close the box by clicking on OK

5. Now that you have tested the connection, you can click on the Create button to create the server in the portal. A popup will appear after a few seconds saying 'Successfully added server' click Ok to close it.

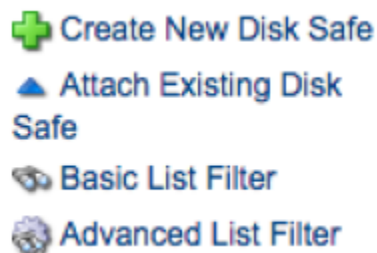
You have now added the server and its time to add a 'Disk Safe' to store you data into.

Creating a Disk Safe

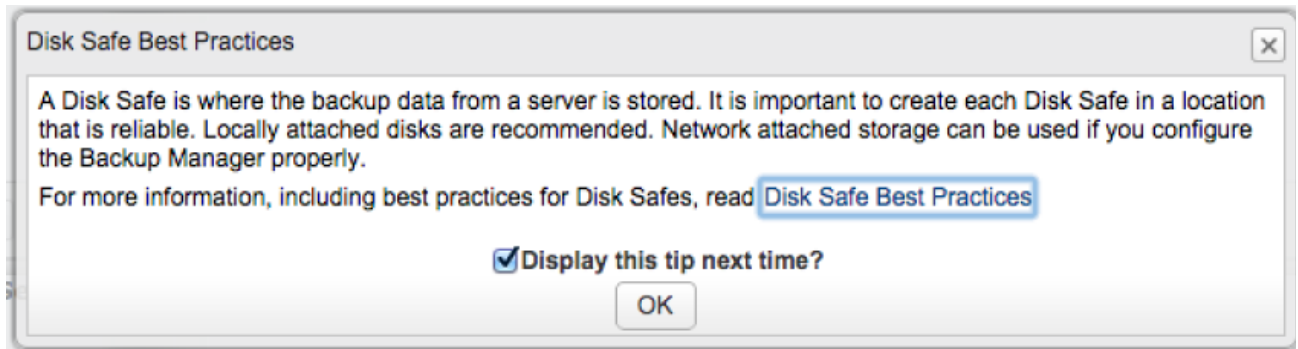
1. From the bottom left, select 'Disk Safes':



2. The top left section of the screen will then change to show Disk Safe Options, select 'Create New Disk Safe':



3. The portal will pop-up a warning to advise you to store the Disk Safe in a reliable location. You can click OK to close it:



4. In the Create New Disk Safe panel you will now need to enter a name for the Disk Safe, select the server that this disk safe will be used to backup and the destination volume:

Settings	Devices	Data Settings	Limits
Identification			
Name	<input type="text" value="server01 disk safe"/>		
Server			
Server	<input type="text" value="server01"/>		
Location			
Volume	<input type="text" value="61-6962"/>		

Name should be something that is easy for you to reference should you want to make a change to the configuration in the future.

Server you should select the name of the server you setup in Step 1.

Volume this is the name of your storage area on the storage server. Most accounts will only have one of this and therefore you can leave it as the default volume name.

5. Now we choose what to backup from this server, click on the 'Devices' tab. The portal will quickly connect to your server to pull a list of directories and devices:

Settings

Devices

Data Settings

Limits

☒ Automatically add new devices

☒ Protect Storage Configuration

Devices On Agent				Devices In Disk Safe			
Mount Point	Capacity	Content Type		State	Mount Point	Capacity	Content Type
	0 bytes	Swap					
/	906.9 GB	Ext2/3/4					
/boot	250 MB	Ext2/3/4					
/tmp	1 GB	Ext2/3/4					

Get Devices From Agent

Create

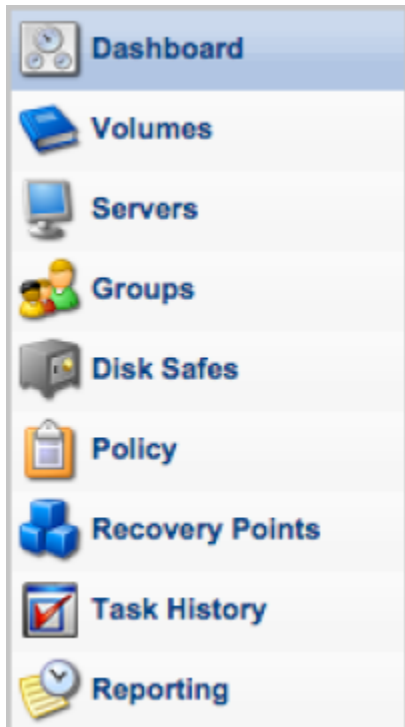
Cancel

- By default it will backup everything, if you want to specify certain directories then uncheck 'Automatically add new devices' and you can manually select the directories to backup.
- If you want to change compression type of add encryption then select the 'Data Settings tab'.
 - Finally if you want to change any of the limits or features click on the 'Limits' tab. We recommend leaving them at default to get started and then if you need to make changes, make them as need.
 - You are now ready to create the Disk Safe, so click the Create button in the bottom right. A popup will appear after a few seconds saying 'Successfully created disk safe' click Ok to close it.

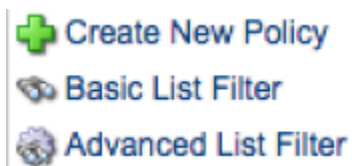
Your Disk Safe is now setup, the final stage is add a backup policy.

Creating a backup policy

- From the bottom left, select 'Policy':



2. The top left section of the screen will then change to show Policy Options, select 'Create New Policy':



3. In the Create New Policy panel, you will setup how often the backup runs, any file/directory exclusions as well as setup native backups of SQL Server or MySQL. As our backup services contain the full version of R1Soft, you are able to use these without additional cost, you can also setup access from control panels such as cPanel.

The screenshot shows a 'Policy Settings' window with several tabs: Policy Settings, Data Retention, File Excludes, Advanced Excludes, SQL Server, Exchange, MySQL, and Control Panels. The 'Policy Settings' tab is active and contains three main sections:

- Identification:**
 - Enabled:** A checkbox that is checked.
 - Name:** An empty text input field.
 - Description:** An empty text input field.
- Disk Safe:**
 - Server:** A dropdown menu with the text 'Select a server'.
 - Disk Safe:** A dropdown menu with the text 'Choose a server to get available Disk Safes'.
- Scheduling:**
 - Replication Schedule:** Includes an 'Edit Schedule' button and the text 'Hourly, 0 minutes after the hour'.
 - Merge Schedule:** Includes an 'Edit Schedule' button and the text 'Daily at 12:00AM'.
 - Disk Safe Verification Schedule:** Includes an 'Edit Schedule' button and the text 'Verification schedule is ON DEMAND, verification must be run manually.'

At the bottom right of the window are three buttons: 'Create' (with a green plus icon), 'Create and run' (with a blue play icon), and 'Cancel' (with a red X icon).

Name should be something that is easy for you to reference should you want to make a change to the configuration in the future.

Description use to describe what this policy is for.

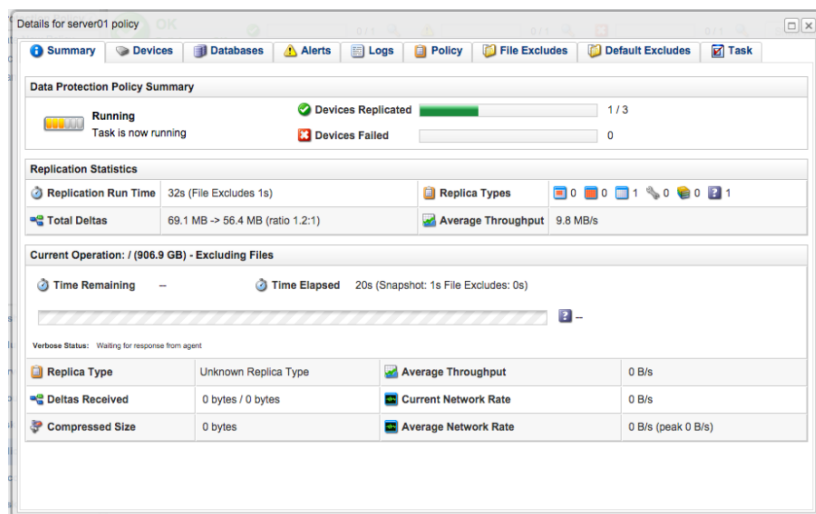
Server you should select the name of the server you setup in Step 1.

Disk Safe you should select the name of the Disk Safe you setup in Step 2.

Replication Schedule can be left at hourly unless you want more frequent backups. You need to make the trade-off between too frequent backups consuming bandwidth on your server versus too infrequent which increases risk of data loss.

4. Once you have set the settings as needed, click on 'Create and run' so that your policy is created and immediately begins the backup process.

You have now created your backup and it will begin to run. Monitor the backup process to watch for errors. Depending on the size of the initial backup it can take a substantial amount of time. You can monitor it through the portal:



If you have any questions, please do not hesitate to contact us.

This guide is provided without warranty expressed or implied. With any data backup or restoration process there is a risk and it should be only undertaken by someone with sufficient training and expertise.