Asigra Cloud Backup v14.2

DS-Notebook Client User Guide

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Asigra

Recovery is Everything™

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Contents

1 About this guide

This guide describes how to use the DS-Notebook Client to back up and restore data on your Mac Notebook.

NOTE: For instructions on how to install the DS-Notebook Client software, see the *Client Software Installation Guide*.

1.1 Intended audience

This guide is intended for users of the DS-Notebook Client who want to back up and restore data on their Mac Notebook.

1.2 Formatting conventions

The following formatting conventions are used in this guide:

Bold

Bold font identifies components, window and dialog box titles, and item names.

Italic

Italic font identifies references to related documentation.

`Monospace Font`

Monospace font identifies text that you should type or that the computer displays.

NOTE: Notes emphasize information that is useful but not essential, such as tips or alternative methods for performing a task.

IMPORTANT: Important notes emphasize information that is essential to the completion of a task and draw special attention to actions that could adversely affect the operation of the application or result in a loss of data.

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2 Getting started

The DS-Notebook Client ensures that the data on your Mac Notebook is always protected by providing intuitive wizards and options that allow you to quickly and easily back up and restore your data.

2.1 Logging on to the DS-Notebook Client

You must log on to the DS-Notebook Client with a valid user account on the local computer.

To log on to the DS-Notebook Client:

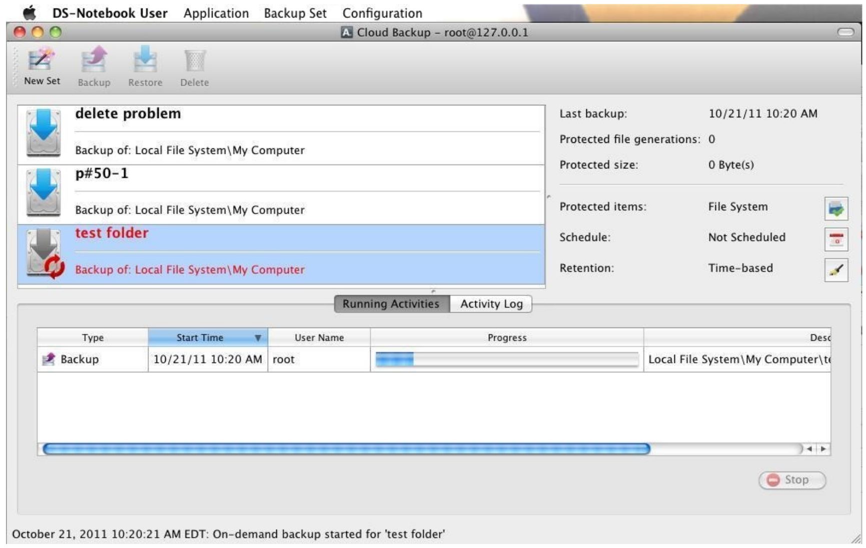
1. On the **Application** menu, point to **DS-Notebook Client**, and then click **DS-Notebook User**.
2. On the **Application** menu, click **Connect**.
3. In the **From** box, select the domain or server used to validate the credentials for the DS-Notebook Client.

    NOTE: This option only appears if the computer on which the DS-Notebook Client is running belongs to a Windows domain.

4. In the **User Name** box, type your user name. This must be a valid and active account (Administrator-level) on the computer where the DS-Notebook Client service is running.
5. In the **Password** box, type your password.
6. To use your current logged on Windows user name and password, select the **Use currently logged in user** check box.
7. Click **Login**.

2.2 Working in the DS-Notebook User main window

When the DS-Notebook User starts, the main window appears.



The main window consists of the following:

Function	Description
Title bar	Displays the log on name and location, which is usually 127.0.0.1 for the local computer.
Backup set list	Displays a list of the backup sets that have been created on the DS-Notebook Client. When you select a backup set, its properties are displayed on the right.
Toolbar icons	• **New Set** – Creates a new backup set. • **Backup** – Performs an on-demand backup. • **Restore** – Performs an on-demand restore. • **Delete** – Deletes the backup set.
Edit icons	• **Protected Items** – Edits the backup set properties. • **Schedule** – Edits the backup set schedule. • **Retention** – Edits the backup set retention.
Running Activities tab	Displays a list of the activities that are currently running on the DS-Notebook Client. To stop the highlighted activity, click **Stop**.
Activity Log tab	Displays a list of all the activities logged by the DS-Notebook Client. You can filter the list by date. To view the event log for the highlighted activity, click **Events.**

Table 1 DS-Notebook User main window functions

2.3 Configuring the DS-Notebook Client

Before using the DS-Notebook Client, you must configure the settings required to connect to the DS-System where your data will be backed up.

To configure the DS-Notebook Client:

1. On the **Configuration** menu, click **Registration Info**.
2. Under **Customer Registration**, do the following:
    a) In the **Customer Name** box, type a descriptive name for the client.
    b) In the **Account #** box, type the account number assigned to you by your service provider.
    c) In the **DS-Client #** box, type the unique client number assigned to you by your service provider.

NOTE: If you already registered the client with a service provider, you should have received a Customer Registration Information (CRI) file containing the required information. Click **Browse** and select the file.

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3. Under **DS-System Info**, do the following:
    a) In the **Address** box, type the IP address or DNS name of the DS-System to which your client will be connecting. Separate multiple IP addresses with a semi-colon.
    b) To add an IP address, click **Add**.
    c) To remove an IP address, select the IP address, and then click **Remove**.
4. Under **Private Key**, do the following:
    a) In the **Type** box, select the type of encryption that you want to use. Stronger encryption requires longer keys.
    b) In the **Key** box, type the unique private encryption key that is to be used for all data that comes from your client.
    c) In the **Confirm** box, retype the private encryption key. You cannot change this key once it is set.
5. Under **Account Key**, do the following:
    a) In the **Type** box, select the type of encryption you want to use. Stronger encryption requires longer keys.
    b) In the **Key** box, type the unique account encryption key assigned by your service provider. Common backup data from all your clients will be encrypted with this same account key.

c) In the **Confirm** box, retype the account encryption key. You cannot change this key once it is set.

NOTE: Encryption keys are case sensitive and the character length depends on the type and level of encryption selected. DES requires 8 characters, AES-128 requires 16 characters, AES-192 requires 24 characters, and AES-256 requires 32 characters. If you enter a shorter string, an auto-complete feature repeats the string until all the required characters are filled. For example, “123” becomes “1231231231231231”.

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6. To forward the encryption keys to the DS-System the first time the client connects to the DS-System, select the **Allow encryption key forwarding to DS-System** check box. This allows your service provider to create a valid CRI file with the encrypted keys so they can recreate a working version of the client.
7. Under **User Info**, enter the request information about your organization.
8. Click **Save**.

2.4 Re-registering the DS-Notebook Client

To provide an extra level of security before backup data is accepted, your service provider might configure your DS-Notebook Client account so that it requires registration with the DS-System. If this is the case, your DS-Notebook Client automatically registers with the DS-System on first connection.

If you need to change the DS-Notebook Client hardware or install the DS-Notebook Client on a new machine, do the following:

- Contact your service provider and ask them to disable the **Requires Registration** option for your DS-Mobile Client on the DS-System.
- Arrange a time with your service provider to perform the re-registration process so that they can open a registration window (approximately 5 minutes).

To re-register the DS-Notebook Client:

1. On the **Configuration** menu, click **Re-Register**.
2. Click **Re-Register**. A message appears informing you if the registration process was successful or not.

2.5 Configuring the system administration tasks

You can configure when the DS-Notebook Client performs daily and weekly system administration tasks. We recommend that you use the default settings.

To configure the system administration tasks:

1. On the **Configuration** menu, click **Admin**.
2. In the **Admin Configuration** dialog box, do the following:
    - To configure when DS-Notebook Client performs daily administration tasks, select the **Daily** check box and specify the time when you want the daily administration process to start.
    - To configure when DS-Notebook Client performs weekly administration tasks, select the **Weekly** check box and specify the time and day when you want the weekly administration process to start.
3. To run the daily or weekly administration tasks immediately, click **Run Now**.
4. Click **Finish**.

2.6 Recovering the DS-Notebook Client database

By default, the DS-Notebook Client database is backed up as part of the daily administration tasks so that you can recover orphaned backup sets or the last backed up version of the database from the DS-System if required.

To recover the DS-Notebook Client database

1. On the **Configuration** menu, click **Recovery**.
2. In the **Recovery** dialog box, select one of the following options:
    - **Recover Orphaned Backup Sets** – Select this option to recover orphaned backup sets on the DS-System. This can occur if backup set data exists on the DS-System, but the backup set settings do not exist in the DS-Notebook Client database.
    - **Recover Backup History Database from the cloud** – Select this option to recover the last backed up version of the database from the DS-System. You will lose any changes made since the last database backup.
3. Click **OK**.

3 Working with backup sets

Once you have created a backup set in the DS-Notebook Client, you can perform other related activities including scheduling, restoring, or deleting a backup.

3.1 Creating a backup set

You must create at least one backup set.

To create a backup set:

1. On the **Backup Set** menu, click **New Set**.
2. In the **Data Source and Login Information** page, do the following:
   a) Under **Data Source**, specify the source computer containing the data that you want to back up. Normally, for laptops, you would use the default “My Computer” selection. If connected to the cloud (network), you can browse to select another machine that is accessible by the DS-Notebook Client.

   b) Under **Login Credentials**, specify the user account that the DS-Notebook Client will use to access the files on the data source. The default is the same user name that you used to log on to the DS-Notebook User.

   If you have selected another computer, you must supply valid access credentials for the selected machine. Click **[...]** and specify the user name in the following format:

   `<computer-name_or_domain-name>\user-name`

   Where `<computer-name_or_domain-name>` is the computer name or domain name where the corresponding user name is defined.

   c) Click **Next**.
3. In the **Select items** page, do the following:
   a) Under **Files To Backup**, select the type(s) of files that you want to backup.

   - To back up all the files in the selected backup location, select **All Files**. To exclude specific types of files, click **Exclude Filters**, and then select then one of the following filters: Exclude temporary files, Exclude backup files, or Exclude file extensions.
   - To back up specific types of files in the selected backup location, select **Documents**, **Video**, **Pictures**, **Music**, **Email**, and/or **Custom file extensions** as required.

NOTE: Hover the cursor over the filter to see the list of extensions. You can separate multiple file extensions using the “|” character. Extensions can be any length as long as the file system accepts the characters.

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b) Under **Data Location**, select one of the following options:

- **Specific Location** – Allows you to select from a list of common backup locations.
- **Custom** – Allows you to browse for a location from a list of accessible folders on the data source.

c) Click **Next**.

4. In the **Select Schedule** page, do the following:

a) Under **Scheduling Type**, select one of the following options:

- **Not Scheduled** – Select this option to perform manual on-demand backups only.
- **Daily Backup** – Select this option to perform a daily backup as per the defined schedule.
- **Monthly Backup** – Select this option to perform a monthly backup as per the defined schedule.

b) Under **Start & End Time**, do the following:

- In the **Start At** box, specify the time that you want the scheduled backup to start.
- To run the scheduled backup only when the DS-Notebook Client is connected to the DS-System, select the **Only if connected to cloud** check box.
- To stop the scheduled backup if it is not completed by a specific time, select the **Stop if not finished by** check box, and then specify the time when you want the backup to stop. You can select a schedule window of up to 6 days.
- To specify the frequency of the scheduled backup, select the **Occurs Every** check box, and then specify the interval in hours.

c) Under **Scheduling Day(s)**, select the days of the week that you want the backup to run. If you are performing a monthly backup, select a date in the month (from 1-28) that you want the backup to run.

d) Under **Global Configuration For All Schedules**, specify the duration after which a missed schedule will be triggered after the schedule time. You can specify a value between 1 and 16 hours.

e) Click **Next**.

5. In the **Select Retention** page, do the following:

a) Under **Time-based Online Retention**, do the following:

- In the **Keep most recent generations** box, specify the maximum number of generations that you want to retain. The default value is 3.

- To keep one generation from each day from the past week, select the **Keep one generation per day for a week** check box.
- To keep one generation from each week from the past month, select the **Keep one generation per week for 1 month** check box.
- To keep one generation from each month from the past year, select the **Keep one generation per month for 1 year** check box.

NOTE: Time-based retention automatically runs after every backup.

b) Under **Deletion of Files**, do the following:

- To delete a file that was removed from the backup source, select the **If files are removed from source** check box, and then specify the amount of time that must pass before the file is removed.
- To retain the latest generations of a file online, specify the number of generations you want to keep in the **Keep generations** box. By default, this is set to 0, which means all generations will be deleted.

c) Click **Next**.

6. In the **Select Backup Set Name** page, type a name for the backup set, and then click **Finish**. The backup set appears in the list in the DS-Notebook User window.

NOTE: To rename a backup set after it has been created, double-click the backup set, type the new name, and then click outside the list to save your changes.

3.2 Scheduling a backup

Schedules determine when data on your DS-Notebook Client will automatically be backed up. You can modify the schedule at any time.

To schedule a backup:

1. Select the backup set that you want to schedule.
2. On the right-side of the DS-Notebook User window, click the **Schedule** button.
3. Configure the schedule as required, and then click **Finish**.

NOTE: If your laptop computer is powered off or the DS-Notebook Client service is not started, any schedules that were missed will be triggered if the machine or service is started within six hours from the time the schedule was supposed to run.

3.3 Performing an on-demand backup

In addition to your scheduled backups, you can perform an on-demand backup of your data at any time.

To perform an on-demand backup:

1. Select the backup set that you want backup.
2. On the **Backup Set** menu, click **Backup**. The backup process starts immediately.
3. To view the results of the backup activity, click the **Activity Log** tab.

NOTE: If there are any errors, you can view the event logs. For more information, on viewing the event log, see Section 3.7, "Viewing logs", on page 19.

3.4 Restoring a backup

You can perform an on-demand restore of your data at any time by selecting all or part of the backed up data that you want to restore. You can also apply various filters if you only want to restore data from a particular time.

1. Select the backup set that you want to restore.
2. On the **Backup Set** menu, click **Restore**.
3. In the **Select Items** page, do the following:
   a) Under **Items to Restore**, select the backed up folders containing the files you want to restore. When you highlight a folder, any backed up files inside the folder are displayed on the right.
   b) In the **File Filter** box, select the types of files (e.g. *.pdf) you want to display. The default (*) is to show all files.
   c) To select a specific generation of a file to restore, click **Generations**.
   d) To filter the items that are available to restore to a specific time period, select the **Time Filter** check box, and then select the following filters:
      - **Backed up on/after** – Displays data that was backed up on or after the specified date and time.
      - **Backed up on//before** – Displays data that was backed up on or before the specified date and time.
      - **Hide files removed on/before** – Hides data that was intentionally deleted from the source computer on or before the specified date and time to prevent you from restoring data that was intentionally deleted.
   e) Click **Next**.

4. In the **Restore Destination** page, do the following:
   a) Under **Restore Destination**, select one of the following options:
      - **Original location** – Restores the data to the same location from which it was backed up and overwrites any data with the same file name.
      - **Original computer, alternate directory** – Restores the data to a different directory on the same computer.

   b) Under **Restore Reason**, select a reason for the restore request.
5. Click **Finish**. The restore process starts immediately.
6. To view the results of the restore activity, click the **Activity Log** tab.

NOTE: If there are any errors, you can view the event logs. For more information, on viewing the event log, see .

3.5 Synchronizing a backup

You can synchronize a backup set to compare the actual online storage on the DS-System with the DS-Notebook Client database to ensure that it is correct.

To synchronize a backup:

1. Select the backup set that you want to synchronize.
2. On the **Backup Set** menu, click **Synchronize**. The synchronization process starts immediately.
3. To view the results of the synchronization activity, click the **Activity Log** tab.

NOTE: If there are any errors, you can view the event logs. For more information, on viewing the event log, see .

3.6 Deleting a backup

You can delete backed up data by selecting the items that you want to delete.

To delete a backup:

1. Select the backup set that you want to delete.
2. On the **Backup Set** menu, click **Delete**.
3. In the **Select Items** page, do the following:
    a) Under **Items to Delete**, select the backed up folders containing the files you want to delete. When you highlight a folder, any backed up files inside the folder are displayed on the right.

    b) In the **File Filter** box, type the extension of the types of files (e.g. *.pdf) you want to display. The default (*) is to show all files.

    c) To filter the items that are available to delete to a specific time period, select the **Filter** check box, and then select the following filters:

    - **Backed up on/after** – Displays data that was backed up on or after the specified date and time.
    - **Backed up on//before** – Displays data that was backed up on or before the specified date and time.
    - **Only files removed since** – Displays data that was intentionally deleted from the source computer.
    - **Do not delete the last** – Allows you to specify the number of generations that you want to retain from the specified time period. If you specify a value, you will only be able to select data that has more generations online than the number specified in this field.
4. Click **Finish**. The delete process starts immediately. If you selected all the data, you must confirm that you want to delete the entire backup set.
5. To view the results of the delete activity, click the **Activity Log** tab.

NOTE: If there are any errors, you can view the event logs. For more information, on viewing the event log, see .

3.7 Viewing logs

You can troubleshoot issues by viewing detailed activity and event logs for all your backup and restore activities.

To view logs:

1. In the main DS-Notebook Client window, click the **Activity Log** tab.
2. In the **From** and **To** boxes, select the date and time of the activity logs that you want to view.
3. To view the event logs for a specific activity, select the activity, and then click **Event**. The Event Log Viewer displays the following information:

Column	Description
Type	Displays the severity of the event (information, warning, or error).
Time	Displays the date and time that the event occurred.
User	Displays the name of the user associated with the event (if applicable).
Category	Displays the category associated with the event.
Event #	Displays the event ID code.
Activity	Displays the session ID number associated with the event.
Detail	Displays the IP address (if applicable).
Description	Displays a description of the event.
From	Specify the start date the you want to use to filter events
To	Specify the end date that you want to use to filter events.
Activity ID	To only view events associated with a specific activity ID, enter the ID.

Table 1 Activity Log

4 Managing the DS-Notebook Client backup policy

You can set the backup policy (backup sets, schedules, retention rules, etc.) for the DS-Notebook Client by creating a local auto-configuration (config-update.xml) file or using a Centrally Managed Backup Policy.

4.1 Creating an auto-configuration (config-update.xml) file

When you use a local auto-configuration (config-update.xml) file to configure the backup sets, user and group roles, backup schedules, and retention rules, the DS-Notebook Client reads the XML file to ensure that its structure is correct.

To create an auto-configuration (config-update.xml) file:

1. Open the sample DTD file provided in the following location on the DVD:

   ```
   \Software\DS-Client\DS-Notebook_Client\Sample_XML_Files\Sample
   Auto-Configuration XML File (DS-Notebook Client)
   ```

2. Update the sample file as required and then save as **config-update.xml**.

   NOTE: The XML file must be named **config-update.xml** and must conform to the structure defined in the **asigra_conf.dtd** file. Only File System backup sets, roles, schedules, and retention rules from the XML file will be applied to the DS-Notebook Client database.

3. Copy the **config-update.xml** file to the folder containing the DS-Notebook Client service.

The DS-Notebook Client checks for an updated config-update.xml file every 10 seconds. If updated, the DS-Notebook Client reads the XML file and applies its settings. After the XML file is applied, the DS-Notebook Client renames the file to config-update-***nnn***.xml, where ***nnn*** is an incremental number.

4.2 Using a Centrally Managed Backup Policy

When a Centrally Managed Backup Policy is enabled for the DS-Notebook Client in the DS-System by a service provider, all policies (backup sets, schedules, retention rules, etc.) are configured and managed by the DS-System.

A config-update.xml file is downloaded to the DS-Notebook Client installation directory and the DS-Notebook Client checks for a new policy every time that it connects to the DS-System and skips any policies that have already been applied.

DS-Notebook Client users can only perform on-demand backups and restores of backup sets managed by the DS-System. Backup sets created by a user can only be restored or deleted. In addition, some menus in the DS-Notebook User window are disabled and any backup sets created by the policy appear with a lock icon super-imposed over the backup set icon.

If the service provider turns off the Centrally Managed Backup Policy, full control over the backup sets returns to the user and any backup sets created by the policy appear with an unlock icon superimposed over the backup set icon.