

Disaster Recovery (MSP) User Guide

Arcserve UDP Cloud Direct

v6.2.2

arcserve®

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- You can get in direct touch with the same library of information that is shared internally by our Arcserve Support experts. This site provides you with access to our knowledge-base (KB) documents. From here you easily search for and find the product-related KB articles that contains the field-tested solutions for many top issues and common problems.
- You can use our Live Chat link to instantly launch a real-time conversation between you and the Arcserve Support team. With Live Chat, you can get immediate answers to your concerns and questions, while still maintaining access to the product.
- You can participate in the Arcserve Support Global User Community to ask and answer questions, share tips and tricks, discuss the best practices and participate in conversations with your peers.
- You can open a support ticket. By opening a support ticket online, you can expect a callback from one of our experts in the product area you are inquiring about.
- You can access other helpful resources appropriate for your Arcserve Support product.

Contents

Chapter 1: Understanding UDP Cloud Direct Data Protection	7
Introduction	8
How to Set up a UDP Cloud Direct Partner Account	9
How to Add a Customer	10
How to Protect Customer Systems	12
Deploying UDP Cloud Direct Agent	13
Downloading UDP Cloud Direct Agent	14
Installing UDP Cloud Direct Agent	16
Registering UDP Cloud Direct Agent	17
How to Setup UDP Cloud Direct Virtual Appliance	19
Downloading UDP Cloud Direct Virtual Appliance	20
Deploying UDP Cloud Direct Virtual Appliance	21
Registering UDP Cloud Direct Virtual Appliance	23
How to Configure the Backup Task	25
How to Configure the Backup Using UDP Cloud Direct Virtual Appliance	28
How to Enable Disaster Recovery	30
How to Enable Disaster Recovery for Virtual Machine	32
How to Run the Backup Task	34
How to Run the Backup Using UDP Cloud Direct Virtual Appliance	36
How to Use Cloud Recovery	39
Activating systems in the Cloud	40
Connecting to the Cloud	42
Chapter 2: Exploring Tabs	49
How to Use Volume Tab	50
How to Use the Usage Tab	52
How to Use the Reports Tab	53
How to Use the Alerts Tab	55
How to Use the Users Tab	56
Using Partner Level Role Types	57
Using Customer Level Role Types	58
Adding a User from the Users Tab	59
Chapter 3: Using PSA Integration	61
Chapter 4: Using Branding	63

Chapter 5: Using Billing Tab	65
Chapter 6: Using Arcserve Knowledge Base	67
Chapter 7: Accessing Release Notes	69

Chapter 1: Understanding UDP Cloud Direct Data Protection

This section contains the following topics:

Introduction	8
How to Set up a UDP Cloud Direct Partner Account	9
How to Add a Customer	10
How to Protect Customer Systems	12
How to Setup UDP Cloud Direct Virtual Appliance	19
How to Configure the Backup Task	25
How to Configure the Backup Using UDP Cloud Direct Virtual Appliance	28
How to Enable Disaster Recovery	30
How to Enable Disaster Recovery for Virtual Machine	32
How to Run the Backup Task	34
How to Run the Backup Using UDP Cloud Direct Virtual Appliance	36
How to Use Cloud Recovery	39

Introduction

Arcserve UDP Cloud Direct Disaster Recovery solution enables customers to protect and recover on-premises servers in the Arcserve Cloud to guard against potential disruptions to their business operations. The solution provides protection for physical and virtual (VMware and Hyper-V) servers running Windows or Linux operating systems. With UDP Cloud Direct, customers are able to achieve business continuity by restoring data from the Arcserve Cloud.

The Arcserve UDP Cloud Direct Disaster Recovery solution has three primary components:

- **UDP Cloud Direct Agent** – lightweight software application that easily installs on a server, and enables the creation of a backup image of the server. The agent transfers the backup image and subsequent restore points to the Arcserve Cloud for off-site protection.
- **UDP Cloud Direct Portal** – web-based interface that enables administration of server backups and server recovery in the Arcserve Cloud.
- **Arcserve Cloud** – cloud infrastructure managed by Arcserve that protects customer environments, and serves as a recovery site in the event of a disaster or disruption to a customer's primary site. With the UDP Cloud Direct Disaster Recovery solution, customers are provisioned resources such as a private virtual data center, random access memory (RAM), and external IP addresses.

How to Set up a UDP Cloud Direct Partner Account

In order to use UDP Cloud Direct, you need to have a UDP Cloud Direct Partner account. If you do not have an existing UDP Cloud Direct Partner account, your Arcserve Sales Representative will be able to assist you with this process.

Once the process of creating a new UDP Cloud Direct Partner account is initiated, you should receive an email at the email address provided in order to complete account setup. Click the link provided in the email and you will be directed to the UDP Cloud Direct Portal where you can specify your new UDP Cloud Direct Partner account credentials. When completed, you can navigate to the [URL](#) and log into the UDP Cloud Direct Portal using your new credentials.

How to Add a Customer

When you log into the UDP Cloud Direct Portal with your Partner account credentials, you will be presented with the Customers tab that displays the list of all customers and their respective amounts of cloud storage consumed.

Customers

Sort by: Status | Name | Usage | Closest to Usage Threshold

All Customers	
PM Customer #2 – Trial	243.1GB
PM Customer #1 – Trial	30.4GB

To add a new customer, follow these steps:

1. Click **+ Add Customer** in the Customers page.
Add Customer dialog opens.
2. Specify the following details:

Customer Name

Enter name of the company of the customer.

Billing

Specify the billing details as paid customer account or trial account.

Data Backup Location

Select the desired Data Backup Location where you would like to store the backup data.

Add Customer ✕

Customer Name

This is the name of the company or organization you'll be providing backup services for.
Ex: Acme Co.

Billing

 ▼

Add this customer to your existing aggregated billing plan

Data Backup Location

3. Click **Add Customer** to submit the specified details.

You have added the new customer to the list of customers successfully.

How to Protect Customer Systems

The next step is to protect systems for the new customer. Protecting a customer's system requires deploying the UDP Cloud Direct Agent.

This section contains the following topics:

- [Deploying UDP Cloud Direct Agent](#)
- [Downloading UDP Cloud Direct Agent](#)
- [Installing UDP Cloud Direct Agent](#)
- [Registering UDP Cloud Direct Agent](#)

Deploying UDP Cloud Direct Agent

A key component of UDP Cloud Direct is the UDP Cloud Direct Agent. This backup agent must be installed on each system that contains data you want to protect in the Arcserve Cloud.

For VMware virtual environments, you can choose to deploy the UDP Cloud Direct Virtual Appliance. This virtual appliance enables agentless backup of VMware virtual machines. The UDP Cloud Direct Virtual Appliance eliminates the need to install the backup agent on each individual VMware virtual machine. Steps to deploy the UDP Cloud Direct Virtual Appliance for VMware are described [here](#).

Downloading UDP Cloud Direct Agent

The UDP Cloud Direct backup agent is available from the UDP Cloud Direct Portal.

Follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

Login

Account Email

Password

[Sign In](#)

[Click here for Ping Identity
Forgot your password?](#)

2. Select a customer from the list of available customers.

All Customers	
PM Customer #2 - Trial	215.9GB
PM Customer #1 - Trial	30.5GB

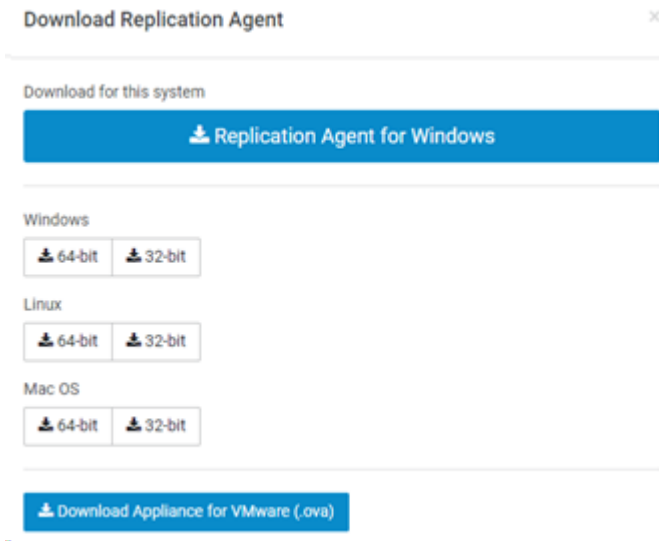
3. Click the *Systems* link under the customer name.

PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)

3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

4. On the *Systems* tab, click [Download Replication Agent](#).
5. From the pop-up window, select download for the appropriate operating system.



6. Note the file name and location of the downloaded file.


You have downloaded the UDP Cloud Direct Agent successfully.

Installing UDP Cloud Direct Agent

For agent-based protection of system data, the UDP Cloud Direct Agent must be installed on each system that you want to protect.

Follow these steps:

1. Locate the downloaded file for the UDP Cloud Direct Agent. If necessary, copy the file to the system the you want to protect.
2. Launch the installer to begin installing the backup agent on the system to protect.

 ArcserveUDPCloudDirectSetup_5.5.49873_x64

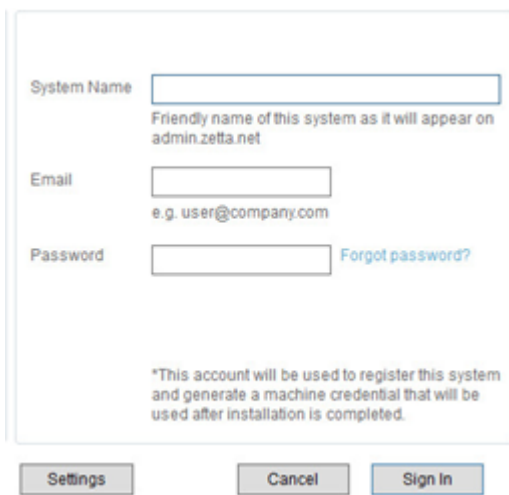
9/29/2016 5:15 PM Windows Installer Package

Registering UDP Cloud Direct Agent

After the backup agent is installed on the system, it must be registered with the Arcserve Cloud. Once the installation completes, you will be prompted to register the backup agent.

To register UDP Cloud Direct Agent, follow these steps:

1. Once the installation is complete, the registration window opens.



The registration window contains the following fields and elements:

- System Name:** A text input field with a placeholder. Below it, the text reads: "Friendly name of this system as it will appear on admin.zetta.net".
- Email:** A text input field with a placeholder. Below it, the text reads: "e.g. user@company.com".
- Password:** A text input field with a placeholder. To its right is a blue link labeled "Forgot password?".
- Disclaimer:** A paragraph of text at the bottom of the form: "*This account will be used to register this system and generate a machine credential that will be used after installation is completed."
- Buttons:** At the bottom of the window are three buttons: "Settings", "Cancel", and "Sign In".

2. At the prompt, enter a name for the system as you want it to appear in the UDP Cloud Direct Portal or keep the default name.
3. Enter the email address and password of your UDP Cloud Direct Partner account credentials.
4. Click **Sign In**. The prompt will reappear and request you to select a customer to associate the system.

Please select the organization you want to register.

System Name
Friendly name of this system as it will appear on admin.zetta.net

Email
e.g. user@company.com

Password [Forgot password?](#)



Organization
PM Customer #1
PM Customer #2
PM Customer #3
PM Customer #4
PM Customer #5

5. Select the customer from the drop-down menu to associate the system with the customer.
6. Click **Sign In** again to register the system.

You will be presented with the UDP Cloud Direct Portal showing the system added to the Systems tab for the specified customer.

Systems

Sort by: Status | Name | Most Recent Backup

 PM Cust 1 Demo ✔ Last backup 5 hours ago	PM Customer #1 <input type="button" value="Start Backup"/>
 PM Cust 1 Open MRS ✔ Last backup 6 hours ago	PM Customer #1 <input type="button" value="Start Backup"/>

You have registered the UDP Cloud Direct Agent successfully.

How to Setup UDP Cloud Direct Virtual Appliance

For VMware virtual environments, the UDP Cloud Direct Virtual Appliance can be deployed to enable agentless protection of one or more VMware virtual machines. The virtual appliance eliminates the need to install the UDP Cloud Direct agent on each virtual machine.

This section contains the following topics:

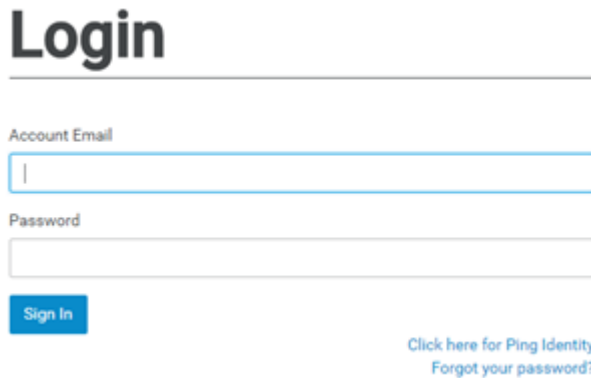
- [Downloading UDP Cloud Direct Virtual Appliance](#)
- [Deploying UDP Cloud Direct Virtual Appliance](#)
- [Registering UDP Cloud Direct Virtual Appliance](#)

Downloading UDP Cloud Direct Virtual Appliance

The UDP Cloud Direct Virtual Appliance is available as a .ova file from the UDP Cloud Direct Portal.

To download UDP Cloud Direct Virtual Appliance, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.



Login

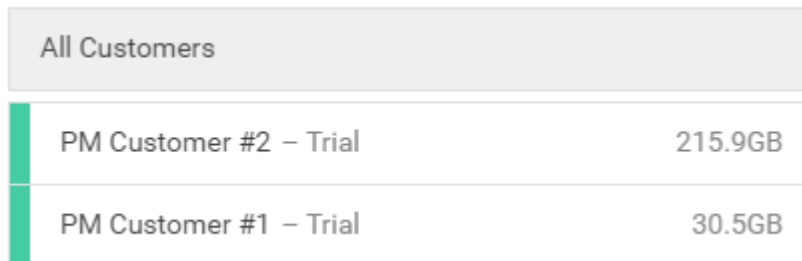
Account Email

Password

Sign In

[Click here for Ping Identity
Forgot your password?](#)

2. Select a customer from the list of available customers.



All Customers	
PM Customer #2 - Trial	215.9GB
PM Customer #1 - Trial	30.5GB

3. Click the *Systems* link under the customer name.



PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)

3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

4. On the *Systems* tab, click **Download Replication Agent**.
5. From the pop-up window, click **Download Appliance for VMware (.ova)**.
6. Make a note of the file name and directory where you saved the download.

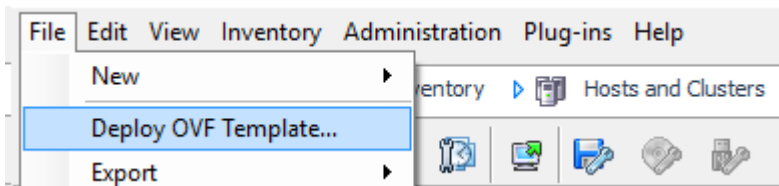
You have downloaded the UDP Cloud Direct Virtual Appliance successfully.

Deploying UDP Cloud Direct Virtual Appliance

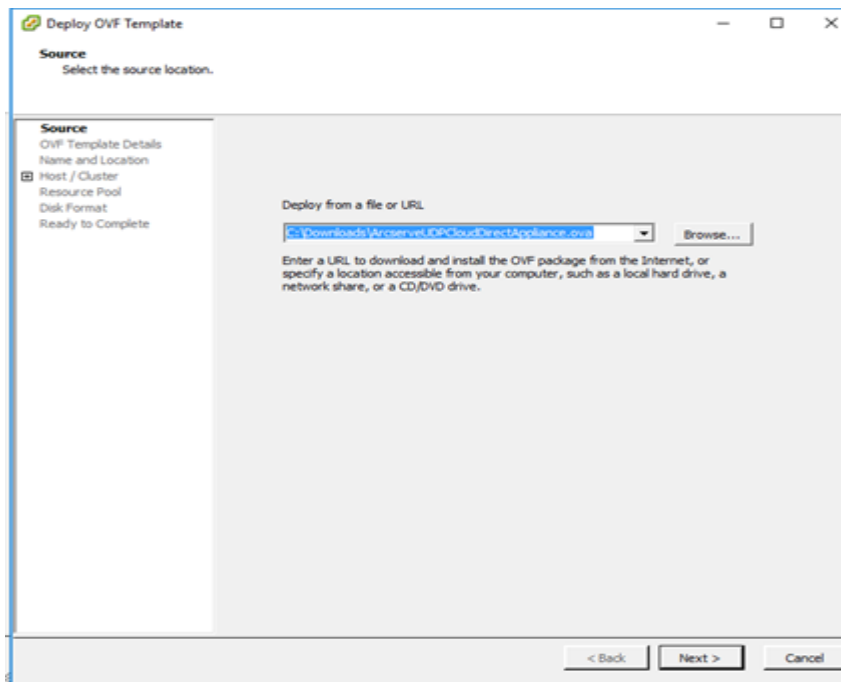
Use the VMware vSphere Web Client to deploy the UDP Cloud Direct Virtual Appliance into your VMware vSphere environment.

Follow these steps:

1. Launch the VMware vSphere Web Client and log in.
2. In the vSphere Web Client, click on File, and then select Deploy OVF Template.



3. Click *Browse* to navigate to the location where you downloaded the *.ova* file, select the file, click **Next >**.



4. Proceed through the rest of the setup process until you get to *Ready to Complete*, and then click **Finish**. The UDP Cloud Direct Virtual Appliance is deployed. Once completed, click **Close**.
5. Navigate to *Getting Started* and select the UDP Cloud Direct Virtual Appliance.

ance, and then click *Power on the virtual machine*.



The screenshot displays the vSphere interface with a help tab titled "What is a Virtual Machine?". The tab includes a navigation bar with options: Getting Started, Summary, Resource Allocation, Performance, Tasks & Events, Alarms, Console, Permissions, and Maps. The main content area contains the following text:

What is a Virtual Machine?

A virtual machine is a software computer that, like a physical computer, runs an operating system and applications. An operating system installed on a virtual machine is called a guest operating system.

Because every virtual machine is an isolated computing environment, you can use virtual machines as desktop or workstation environments, as testing environments, or to consolidate server applications.

In vCenter Server, virtual machines run on hosts or clusters. The same host can run many virtual machines.

Basic Tasks

- ▶ Power on the virtual machine
- 🔧 Edit virtual machine settings

The interface also features a diagram of a vSphere environment. It shows a vSphere Client connected to a vCenter Server, which manages a Datacenter. The Datacenter contains a Cluster of hosts, and one host is shown running several Virtual Machines.

Explore Further

- 📖 Learn more about virtual machines
- 📖 Learn how to install an operating system

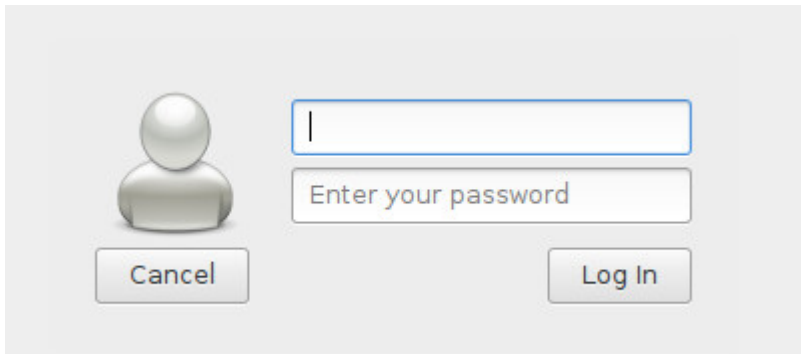
You have deployed the UDP Cloud Direct Virtual Appliance successfully.

Registering UDP Cloud Direct Virtual Appliance

Once the Virtual Appliance is installed and powered on, you need to register the UDP Cloud Direct Virtual Appliance with the Arcserve Cloud.

Follow these steps:

1. In the VMware vSphere Web Client, navigate to *Console* tab for the virtual appliance.



2. Enter the default user name *zetta*, the default password *zettazetta*, and click *Log In*.
3. Enter the user account credentials (email/password) of a user that was created under the customer account that leverages the virtual appliance, and then click *Continue to vCenter Configuration*.

Note: You need to create a user under the customer account to complete this step.

Configure

Email

Password

System Name

[Continue to vCenter Configuration](#)

4. Enter your vCenter Server address, vCenter Username, and vCenter Password, and then click *Complete Configuration*.

Configure vCenter

vCenter Server	<input type="text"/>	Check Certificate
Username	<input type="text"/>	
Password	<input type="password"/>	

Complete Configuration

You should get confirmation that the registration was successfully completed. It could take up to 5 minutes for data to become available in the UDP Cloud Direct Portal.

Success!

Please login to admin.zetta.net to configure the virtual machines you want to backup. You may have to wait about 5 minutes before the data becomes available.

5. **Optional step:** You can click *Change Appliance Password* to change the password for your UDP Cloud Direct Virtual Appliance using your current default password.

You have registered the UDP Cloud Direct Virtual Appliance successfully.

How to Configure the Backup Task

Protecting system data involves creating one or more backup tasks. You need to configure the backup tasks configured for systems where the UDP Cloud Direct Agent is installed. When using the UDP Cloud Direct Virtual Appliance, a single backup tasks is used to backup up one or more virtual machines.

To create the backup task for a system, follow these steps:

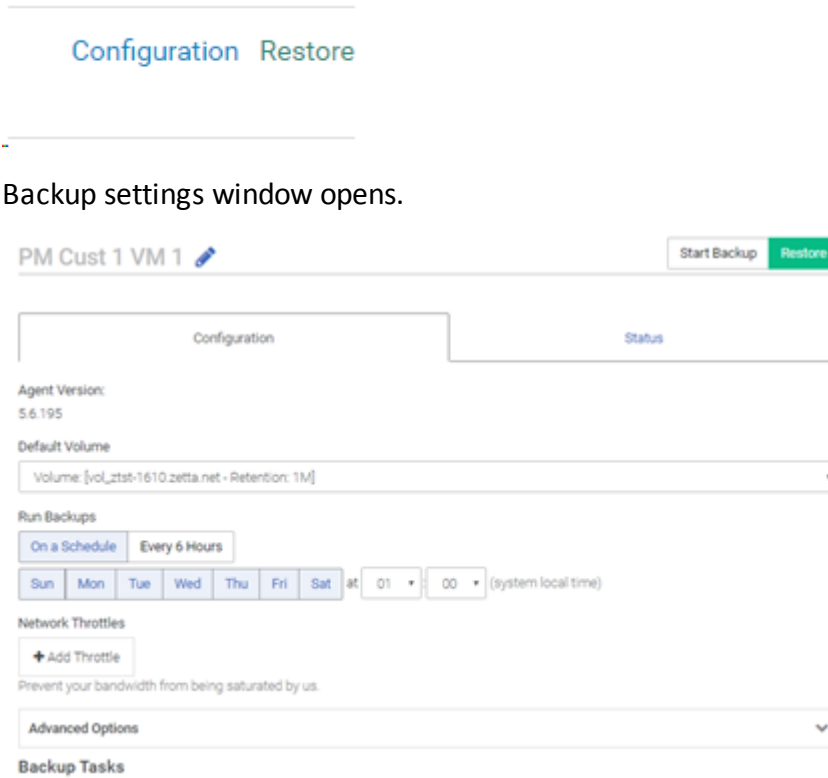
1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

2. Select the customer from the list of available customers.

All Customers	
PM Customer #2 – Trial	215.9GB
PM Customer #1 – Trial	30.5GB

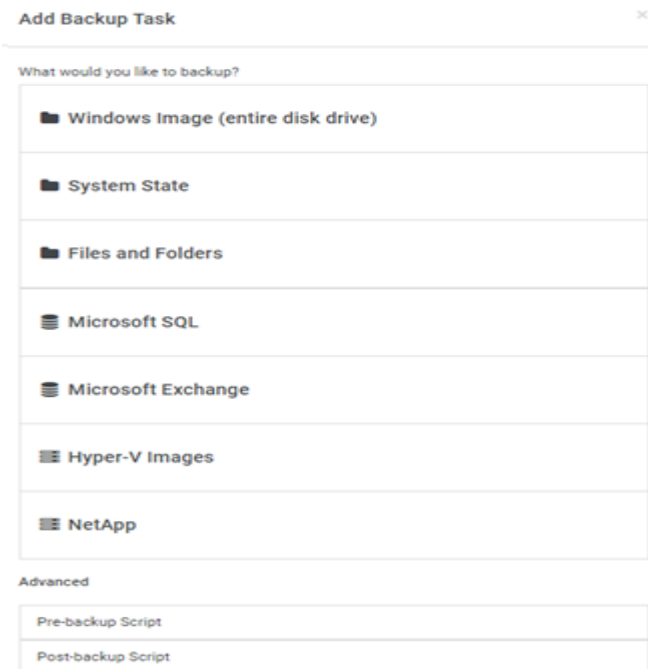
3. Click the *Systems* link under the customer name.

4. You are presented with the *System* tab for the customer. You should see the list of the registered systems. Click on the *Configuration* link to view the backup settings for the system.



Backup settings window opens.

5. Click **+ Add Backup Task** under the *Backup Tasks* section to create a new task. In order to leverage UDP Cloud Direct, you must create a *Windows Image Backup* backup task.



6. From the pop-up window, click **Start Backup** **Enable Disaster Recovery** to create the backup task.

7. Select the disk letter from the drop-down list.
 8. Click **Done** on the task pop-up screen.

The newly added task appears under the Backup Tasks section.

Note: It is possible to create multiple tasks for each system. It is important to note that a single schedule applies to all the tasks created for the system.


You have created and configured the backup task successfully.

How to Configure the Backup Using UDP Cloud Direct Virtual Appliance

The UDP Cloud Direct Virtual Appliance allows for the protection of VMware virtual machines. Once deployed, the virtual appliance will discover all the virtual machines associated with the specified VMware vCenter server. The deployed virtual appliances and the discovered virtual machines will be listed on the *VMware* tab for a customer.

To configure the UDP Cloud Direct Virtual Appliance to backup VMware virtual machines, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.



Login

Account Email

Password

Sign In

[Click here for Ping Identity
Forgot your password?](#)

2. Select the customer from the list of available customers.

Customers

Sort by: Status | Name | Usage | Closest to Usage Threshold

All Customers	
PM Customer #2 – Trial	243.1GB
PM Customer #1 – Trial	30.4GB

3. Click the *VMware* link under the customer name.

PM Customer #1

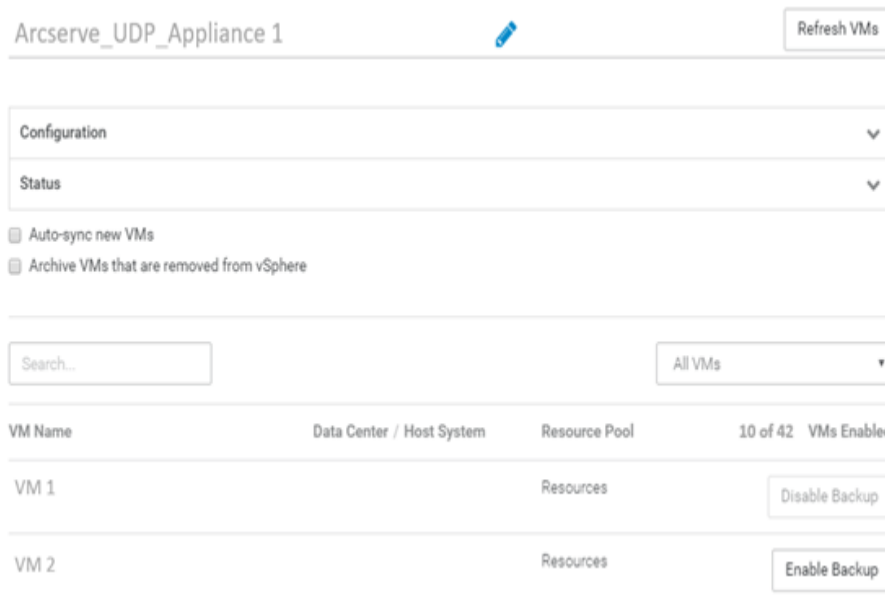
2 Systems | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)
 3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

You are presented with the *VMware* tab for the customer. You will see a list of the registered UDP Cloud Direct Virtual Appliances.

VMware



- Click the desired UDP Cloud Direct Virtual Appliance from the list. The virtual machines visible to the Virtual Appliance are listed.



- Click **Enable Backup** for each virtual machine that you want the UDP Cloud Direct Virtual Appliance to backup. Once enabled for backups, the virtual machine will appear listed on the *Systems* tab.

You have configured the backup using UDP Cloud Direct Virtual Appliance successfully.

How to Enable Disaster Recovery

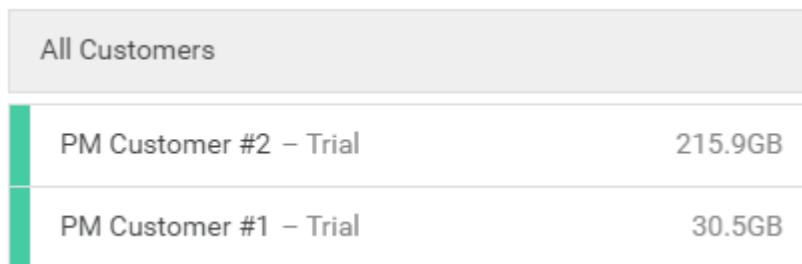
Once the *Windows Image Backup* task is properly configured, then you can enable UDP Cloud Direct Disaster Recovery for the system. This will protect the system so that a virtual instance can be powered on in the Arcserve Cloud.

To enable disaster recovery, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.



2. Select the customer from the list of available customers.



All Customers	
PM Customer #2 - Trial	215.9GB
PM Customer #1 - Trial	30.5GB

3. Click the *Systems* link under the customer name.



You are presented with the *Systems* tab for the customer. You should see a list of the registered systems.



4. Click **Enable Disaster Recovery** for the desired system.

5. Specify the amount of Random Access Memory (RAM) that you would like the virtual instance of the system to have when it is run in the Arcserve Cloud.
6. Specify the appropriate Microsoft licenses if known.

Add to Disaster Recovery Plan ×

Disaster Recovery allows you to run your systems in a private cloud that we provide. In order to enable this system for Disaster Recovery, we must change the location of your system's data to a volume inside of our Disaster Recovery environment. You will have to complete one sync before you may activate this system in our cloud.

RAM (GB)

Must be an even integer.

Microsoft Licenses

7. Click **Save**.
8. Click **Close** on the acknowledgment pop-up screen.

Note: After disaster recovery is enabled for the system, you should notice that the indicator showing that Disaster Recovery is enabled for the system.

PM Customer #1

Start Backup ✓ Disaster Recovery

You have enabled the Disaster Recovery successfully.

How to Enable Disaster Recovery for Virtual Machine

The UDP Cloud Direct Virtual Appliance enables agentless protection for VMware virtual machines. Once deployed, the virtual appliance will discover all the virtual machines associated with a specified VMware vCenter server. In Virtual machines that have backups enabled, you can enable the disaster recovery protection.

To enable disaster recovery for protected VMware virtual machines, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.



Login

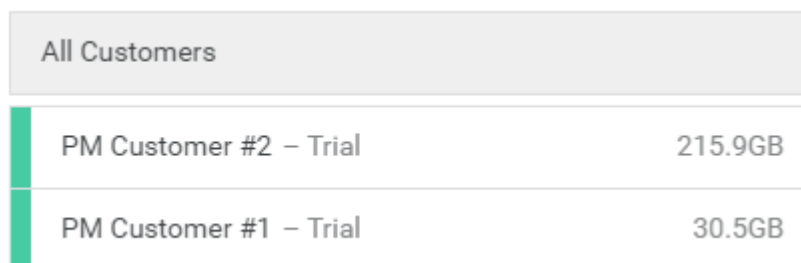
Account Email

Password

[Sign In](#)

[Click here for Ping Identity
Forgot your password?](#)

2. Select the customer from the list of available customers.



All Customers	
PM Customer #2 – Trial	215.9GB
PM Customer #1 – Trial	30.5GB

3. Click the *Systems* link under the customer name.



PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)

3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

You are presented with the *Systems* tab for the customer. You should see a list of the registered systems and protected virtual machines.

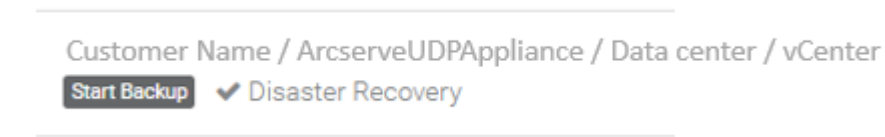


4. Click **Enable Disaster Recovery** for the desired virtual machine.
5. Specify the amount of Random Access Memory (RAM) that you would like the virtual instance of the system to have when it is run in the Arcserve Cloud.
6. Specify the appropriate Microsoft licenses if known.



7. Click **Save**.
8. Click **Close** on the acknowledgment pop-up screen.

Note: After disaster recovery is enabled for the virtual machine, you should notice that the indicator showing that Disaster Recovery is enabled for the virtual machine.



How to Run the Backup Task

The data of a system is not protected until the backup tasks have run at least once. The backup tasks configured for a system will run according to the configured schedule. It is also possible to initiate the backup tasks to run manually.

To manually initiate the backup tasks of a system to run, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

Login

Account Email

Password

[Sign In](#)

[Click here for Ping Identity
Forgot your password?](#)

2. Select the customer from the list of available customers.

All Customers	
PM Customer #2 – Trial	215.9GB
PM Customer #1 – Trial	30.5GB

3. Click the *Systems* link under the customer name.

PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)
3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

You are presented with the *Systems* tab for the customer. You will see a list of the registered systems.

4. Click on the *Configuration* link to view the backup settings for the system.

[Configuration](#) [Restore](#)

Backup Settings window opens.

PM Cust 1 VM 1 Start Backup Restore

Configuration Status

Agent Version:
5.6.195

Default Volume
Volume: [vol_ztst-1610.zetta.net - Retention: 1M]

Run Backups
On a Schedule Every 6 Hours

Sun Mon Tue Wed Thu Fri Sat at 01 : 00 (system local time)

Network Throttles
 Prevent your bandwidth from being saturated by us.

Advanced Options

Backup Tasks

5. Click **Start Backup** to manually start all the backup tasks configured for the system. The tasks will also run according to the configured schedule. The configured schedule applies to all tasks configured for the system.

Note: To manually start a backup, you can click **Start Backup** for the system on the *Systems* tab.

You have started the backup task successfully.

How to Run the Backup Using UDP Cloud Direct Virtual Appliance

The UDP Cloud Direct Virtual Appliance will perform a backup of all its associated virtual machines where backup has been enabled. The virtual appliance will perform that backups according to the configured scheduled or backups can be manually initiated.

To initiate the virtual appliance to backup all enabled virtual machines manually, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

Login

Account Email

Password

[Sign In](#)

[Click here for Ping Identity
Forgot your password?](#)

2. Select the customer from the list of available customers.

Customers

Sort by: Status | Name | Usage | Closest to Usage Threshold

All Customers	
PM Customer #2 – Trial	243.1GB
PM Customer #1 – Trial	30.4GB

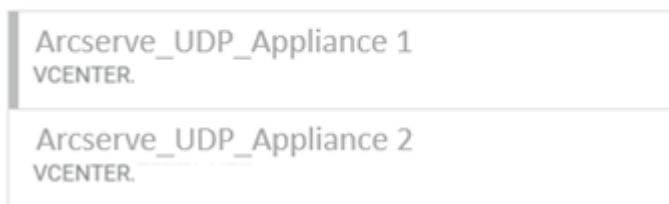
3. Click the *VMware* link under the customer name.

PM Customer #1

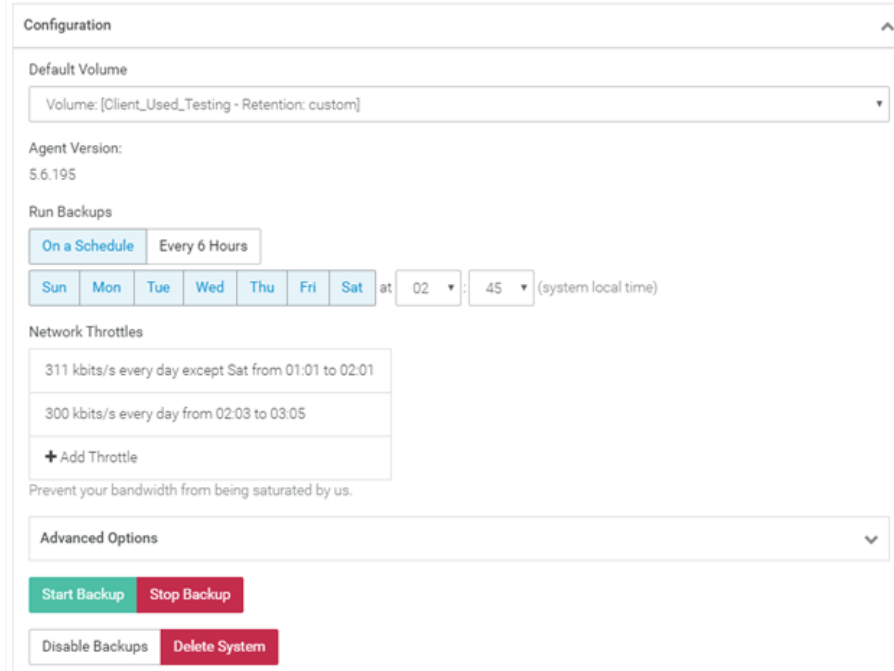
2 Systems | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)
 3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

You are presented with the *VMware* tab for the customer. You will see a list of the registered UDP Cloud Direct Virtual Appliances.

VMware



- Click the desired UDP Cloud Direct Virtual Appliance from the list. The virtual machines visible to the Virtual Appliance are listed.
- Expand the *Configuration* section for the selected Virtual Appliance.



- Ensure that the virtual appliance is backing up the virtual machines to the desired volume.

7. Click **Start Backup** to initiate the UDP Cloud Direct Virtual Appliance to backup all of its associated virtual machines for which backups have been enabled.

You have started the backup using UDP Cloud Direct Virtual Appliance successfully.

How to Use Cloud Recovery

A key benefit of UDP Cloud Direct Disaster Recovery is providing the ability for customers to run virtual instances of protected systems in the cloud in the event that a disaster impacts their On-premises environment. The process of powering on virtual instances of servers in the cloud and leveraging the cloud as a recovery site is often referred to a Failover.

About Failover

The Failover process involves all the steps necessary to ensure that a customer can leverage the cloud as they would their On-premises environment to continue running their critical business operations. Important aspects of the failover process include powering on virtual instances of protected systems in the cloud and enabling secure connectivity to the recovered environment.

The UDP Cloud Direct Disaster Recovery solution enables the administration of the failover process through the *Disaster Recovery* tab of the UDP Cloud Direct Portal.

This section contains the following topics:

- [Activating systems in the Cloud](#)
- [Connecting to the Cloud](#)

Activating systems in the Cloud

To access the Disaster Recovery tab, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

Login

Account Email

Password

[Sign In](#)

[Click here for Ping Identity](#)
[Forgot your password?](#)

2. Select the customer from the list of available customers.

Customers

Sort by: Status | Name | Usage | Closest to Usage Threshold

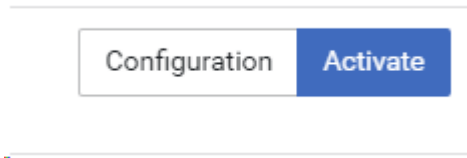
All Customers	
PM Customer #2 – Trial	243.1GB
PM Customer #1 – Trial	30.4GB

3. Click the *VMware* link under the customer name.

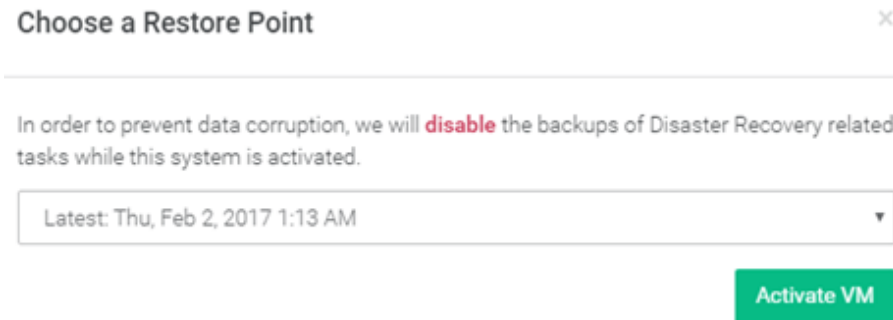
PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)
3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

4. Under the *Idle VMs* section, click **Activate** to initiate the activation of a virtual instance of a protected system in the cloud.

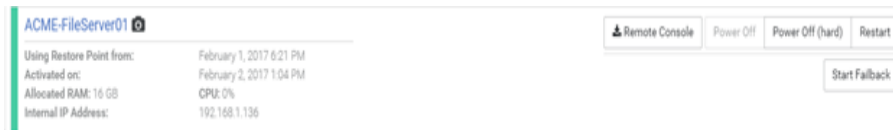


5. Select the desired restore point from the drop-down list.



6. Click **Activate VM** button to power on the virtual instance in the cloud.

Note: Once activated, the virtual instance will appear in the listed *Active VMs* section, along with information about the virtual instance and administrative buttons.



You have activated the system in Cloud successfully.

Connecting to the Cloud

There are multiple options for securely connecting to the Arcserve Cloud in order to leverage the virtual instances of recovered servers.


This section contains the following topics:

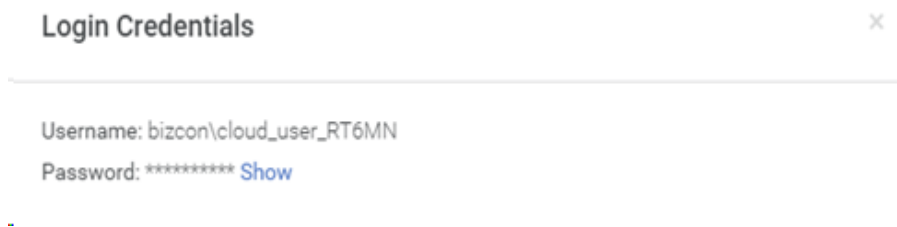
- [How to Connect to Remote Console](#)
- [How to Connect to Point to Site VPN](#)
- [How to Connect to Site to Site VPN](#)
- [How to Failback an Activated Virtual License](#)

How to Connect to Remote Console

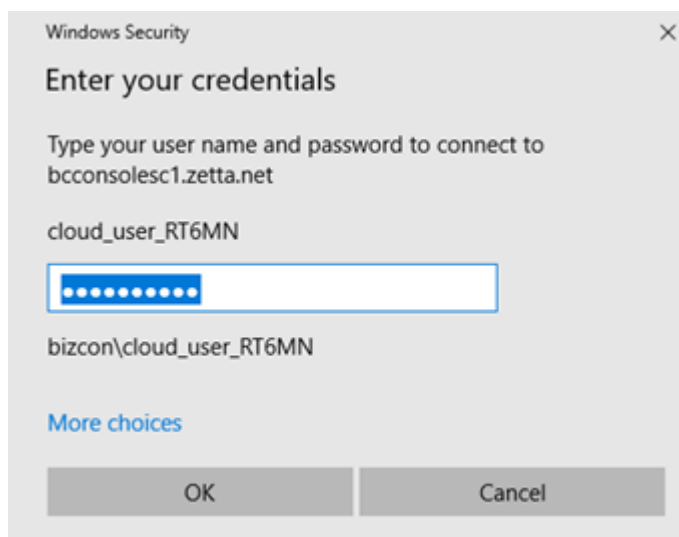
A remote console can be established with a single virtual instance running in the Arcserve Cloud. A remote console connection enables a user to access a virtual instance running in the cloud using the remote desktop protocol.

To establish a remote console connection with an activated virtual instance from the *Disaster Recovery* tab, follow these steps:

1. Click  **Remote Console** for the activated system to download the remote desktop protocol (.rdp) file.
2. From the Login Credentials pop-up window, click the *Show* link to reveal the password required for the connection.



3. Launch the downloaded remote desktop protocol (.rdp) file.
4. Click the *Connect* button in the RemoteApp program dialog box.
5. Enter the password from the Login Credentials pop-up window into the Windows security dialog box.



6. Click **OK** to initiate the remote console connection. A web browser window should appear with the login screen of the virtual instance.

7. Click **Yes** when asked *Do you want to connect despite certificate errors.*
8. Click **Send Ctrl+Alt+Del** at the top of the browser window.
9. Enter the Windows credentials for the virtual instance.

Note: The Windows credentials are same for the on-premises system at the time of the restore point.

You have connected to the remote Console successfully.

How to Connect to Point to Site VPN

A *Point to Site* connection enables a secure virtual private network (VPN) connection between a single client machine and the virtual private data center in the Arcserve Cloud. Such a connection would enable an end user at a coffee shop to establish a secure private connection to the recovered environment in the cloud. It is important to note that a separate connection would be needed if the end user also required access to systems that were still available in the On-premises environment. The On-premises systems would not be able to communicate with the recovered systems in the cloud using the Point to Site connection.

The instructions to establish a *Point to Site* connection is available on the *Disaster Recovery* tab in the *Connect Point-to-Site* dialog box.

Connect Point-to-Site

Access your active VMs by connecting your local machine to our cloud. Use this if you're not in your office (or don't have to your company network through your company's VPN) or if your entire site is down.

 Session Logs

[Connection Instructions](#)

How to Connect to Site to Site VPN

A *Site to Site* connection enables a secure virtual private network (VPN) connection between an externally accessible IP address of an On-premises environment and the virtual data center in the Arcserve Cloud. This type of connection would eliminate the need for end user to establish a *Point to Site* VPN connection. With a *Site to Site* connection, systems in the on-premises environment would be able to communicate with recovered systems in the cloud.

A *Site to Site* connection enables the ability to offer IP Takeover functionality. IP Takeover makes it possible for a virtual instance running in the cloud to assume the IP address of a failed On-premises system. When other On-premises systems or applications need to communicate with the failed On-premises system, the request will be forwarded to the virtual instance running in the cloud.

Arcserve offers the UDP Cloud Direct Virtual Network Appliance to help establish a *Site to Site* connection. This virtual network appliance runs as a virtual machine in VMware vSphere, Microsoft Hyper-V, and Oracle VirtualBox environments. Once the virtual network appliance is deployed, the process of establishing a *Site to Site* connection can be completed on the *Disaster Recovery* tab of the UDP Cloud Direct Portal.

Connect Site-to-Site

Access your active VMs by connecting your local network with our cloud network. Use this if you're in the office (or have access to it through your company VPN) and if have a partial disaster with only some of the systems on your site down.

Configuration & IP Takeover

How to Failback an Activated Virtual License

The Failback process involves all the steps necessary to recover an On-premises environment following a disaster by leveraging virtual instances of systems running in the cloud. UDP Cloud Direct Disaster Recovery enables customer to failback virtual instances from the Arcserve Cloud through the UDP Cloud Direct Portal. The failback process occurs over three iterations. First, a snapshot of the activated virtual instance is taken and then downloaded. Second, another snapshot of the activated virtual instance is taken, and only the differences between the two snapshots are downloaded. Finally, the activated virtual instance will be shut down so that a final snapshot can be taken and the remaining differences can be download. Once the download is complete, the resulting disk image can be used to create a virtual machine in the On-premises environment.

To failback an activated virtual instance, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Partner account credentials.

Login

Account Email

Password

[Sign In](#)

[Click here for Ping Identity
Forgot your password?](#)

2. Select the customer from the list of available customers.

Customers

Sort by: Status | Name | Usage | Closest to Usage Threshold

All Customers	
PM Customer #2 – Trial	243.1GB
PM Customer #1 – Trial	30.4GB

3. Click the *Disaster Recovery* link under the customer name.

PM Customer #1

[2 Systems](#) | [VMware](#) | [Disaster Recovery](#) | [Usage](#) | [Volumes](#) | [Reports](#) | [Users](#)

3 Volumes | 30.25 GB Used as of 02/01/2017 16:00:00 PST

4. Click **Start Failback** for an activated virtual instance.
5. Select a destination system from the drop-down list to download iterative snapshots of the disk image of the activated virtual instance.
6. Specify a path on the destination system.
7. Specify the desired format for the disk image file that will be downloaded.
8. Enter the password of your account credentials.

Start Failback ×

Destination System

Destination System - Windows ▾

Destination Path

Destination Format

IMG ▾

Password for admin@domain.com

The failback of this cloud system will take place over three steps. In the first step, each disk image will be restored to your local environment; however, the following steps will only sync the changes. Please note that after the second step a user will have to click the 'Complete Final Failback Step' button to proceed because this step requires us to shut down your cloud system. Consequently, we recommend that you execute this step during non-business hours. You will be emailed when the final step is ready.

Start Failback

9. Click **Start Failback** to begin the failback process. An email notification is sent when it is time for the final step of the process. The progress of the failback process will be displayed on the *Disaster Recovery* tab.
10. To initiate the final step of the download process, click **Complete Final Failback Step** for the activated virtual instance.

Note: Upon completion, a disk image file is available in the specified format, in the specified location, on the specified destination system. The disk image file is used to create a virtual machine in the On-premises environment as part of the process of recovering the On-premises environment.

Chapter 2: Exploring Tabs

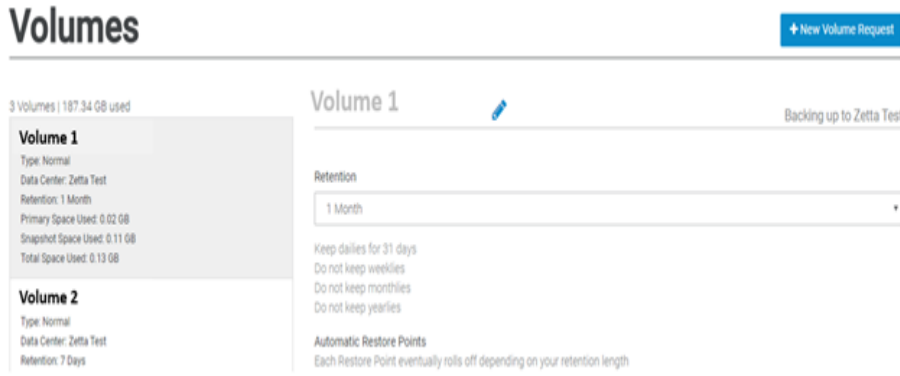
The UDP Cloud Direct solution protects the data of On-premises systems in the Arcserve Cloud. Within the Arcserve Cloud, the system data is stored in volumes. There are a few different types of volumes including Normal and ZeroCopy (for Disaster Recovery), and each volume is identified by its name, retention policy, and Arcserve data center location.

This section contains the following topics:

How to Use Volume Tab	50
How to Use the Usage Tab	52
How to Use the Reports Tab	53
How to Use the Alerts Tab	55
How to Use the Users Tab	56

How to Use Volume Tab

The *Volumes* tab lists details of the volumes associated with a customer. On this tab, it is possible to rename the volume, as well as change its retention policy. It is also possible to request that a new volume be created.



To create a new volume, follow these steps:

1. Click **+ New Volume Request**.
2. Specify a name for the new volume.
3. Specify a data center location.
4. Specify the retention policy for the volume.

The screenshot shows the 'New Volume Request' form. It has a title bar with a close button (X). The form contains the following fields: 'Volume Name' (text input), 'Data Center' (dropdown menu with '-- Select Datacenter --'), 'Retention' (dropdown menu with '-- Select Retention Policy --'), and 'Comments (optional)' (text input). At the bottom of the form is a blue button labeled 'Request New Volume'.

5. Click **Request New Volume**.

Note: The new volume request is received and processed by the Arcserve Team. After the request is successfully processed, the new volume will

appear among the list on the *Volumes* tab. The new volume is available as a destination for configured backup tasks.

You have created the new volume successfully.

How to Use the Usage Tab

The *Usage* tab provides a visual display of the storage being used to protect system data of a customer in the Arcserve Cloud over a period of time. There is a graph for each volume that can be viewed by Day, Month, or Year for the present time, or a time period in the past. Storage usage for a particular date and time may be viewed by moving the mouse over the graph. Additional usage data for a specific volume can be viewed by clicking on the volume name.

Usage

13 Volumes | 1161.15 GB Used as of 02/01/2017 15:00:00 PST

◀ Jan 1 – Feb 1, 2017 ▶
Day | Month | Year

Usage by Volume

Charts Relative to Largest | [Expand All Charts](#)



How to Use the Reports Tab

The Reports tab lists the available types of reports and alerts. Each report type can be configured for scheduled delivery, or can be generated On Demand. Each alert type will send an email notification when the specified event occurs. Multiple instances of each report and alert can be created. The number of each report and alert type that is configured is displayed.


All reports are delivered through email, and all except the Daily Digest report are delivered with a Comma Separated Value (CSV) file attached that contains job details.

Reports and alerts can be generated to include all systems, or only selected systems.

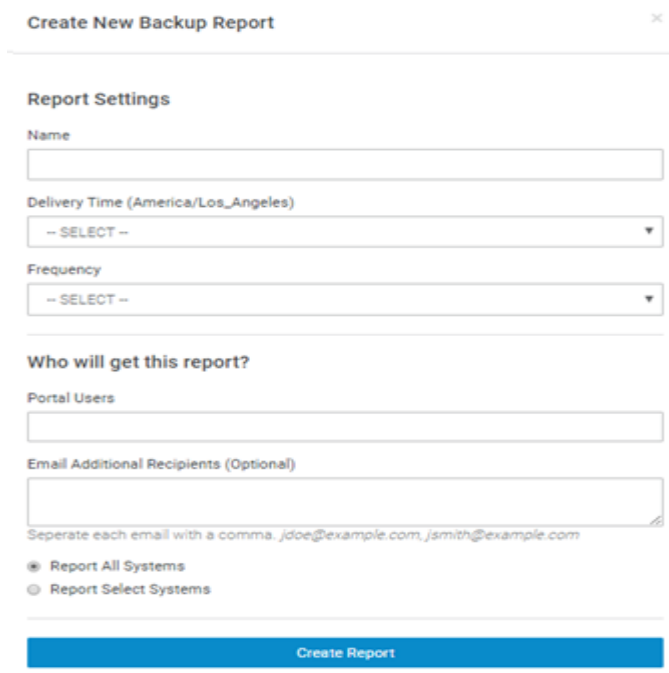
It is possible to configure reports and alerts at the Partner level and/or at the customer level.

To create a report, follow these steps:

1. Click on the desired report type.
2. Click on **+ Add Report** to create a new instance of the report.

Note: Clicking  **On Demand** generates a report that is delivered as soon as possible to the email address of the current user.

3. Configure the report by providing a report name, the delivery time, the delivery frequency, report recipients, and the protected systems to include in the report.



The screenshot shows a web form titled "Create New Backup Report" with a close button (X) in the top right corner. The form is divided into two main sections: "Report Settings" and "Who will get this report?".

Report Settings

- Name:** A text input field.
- Delivery Time (America/Los_Angeles):** A dropdown menu with "-- SELECT --" as the selected option.
- Frequency:** A dropdown menu with "-- SELECT --" as the selected option.

Who will get this report?

- Portal Users:** A text input field.
- Email Additional Recipients (Optional):** A text input field with a small icon in the bottom right corner.
- Seperate each email with a comma. jdoe@example.com, jsmith@example.com
- Report All Systems
- Report Select Systems

At the bottom of the form is a blue button labeled "Create Report".

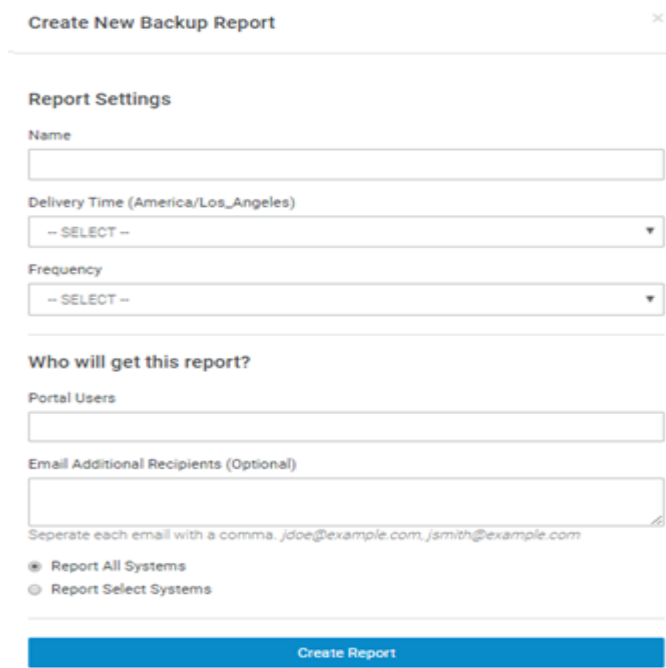
4. Click **Create Report** to create an instance of the report.

You have created the report successfully.

How to Use the Alerts Tab

To create an alert, follow these steps:

1. Click on the desired alert type.
2. Click **+ Add Alert** to create a new instance of the alert.
3. Configure the alert by providing a name, specifying the criteria, specifying the recipients, and specifying the protected systems for which to generate the alert.



The screenshot shows a form titled "Create New Backup Report" with a close button (X) in the top right corner. The form is divided into several sections:

- Report Settings:**
 - Name:** A text input field.
 - Delivery Time (America/Los_Angeles):** A dropdown menu with "-- SELECT --" selected.
 - Frequency:** A dropdown menu with "-- SELECT --" selected.
- Who will get this report?:**
 - Portal Users:** A text input field.
 - Email Additional Recipients (Optional):** A text input field with a small icon in the bottom right corner. Below the field, there is a note: "Seperate each email with a comma. jdoe@example.com, jsmith@example.com".
 - Report All Systems:** A radio button that is selected.
 - Report Select Systems:** A radio button that is not selected.

At the bottom of the form is a blue button labeled "Create Report".

4. Click **Create Alert** to create an instance of the alert.

You have created the alert successfully.

How to Use the Users Tab

The *Users* tab allows you to manage the users who can access the UDP Cloud Direct Portal. Users may be configured at the Partner level or at the customer level.

This section contains the following topics:

- [Using Partner Level Role Types](#)
- [Using Customer Level Role Types](#)
- [Adding a User from the Users Tab](#)

Using Partner Level Role Types

A user may be added to the account and given a particular role. Each role provides different access rights and administrative capabilities. The user role types are as follows:

- **Partner Admin** – users have all privileges including system, volume, user, and support ticket management.
- **Partner Group Admin** – users have privileges for select group of accounts including system, user, and support ticket management. They may also access and recover the data stored by systems of the accounts they manage.
- **Partner Sales** – users are restricted to account management (adding, removing and converting) and support ticket management.

Using Customer Level Role Types

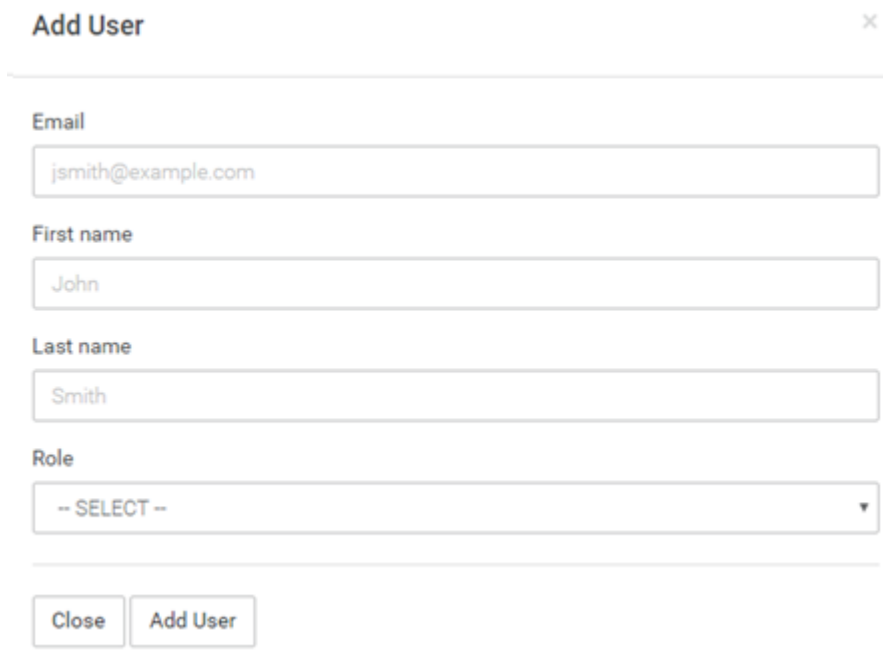
A user may be added to the account and given a particular role. Each role provides different access rights and administrative capabilities. The user role types are as follows:

- **Admin** – users have all privileges including system, volume, user, and support ticket management. They may also access and recover the data stored by every system in their organization
- **Billing** – users may view invoices and manage an organization's payment information. They may also create and edit support tickets and view an organization's retention information (For example, usage, volume retention).
- **Storage** – users are allowed to manage storage details (For example, volume retention, manual restore points) and create and edit support tickets.
- **Restore** – users may access and recover the data stored by systems for which they been granted access and the ability to manage support tickets.

Adding a User from the Users Tab

To add a user from the Users tab, follow these steps:

1. Click **+ Add User**.



The screenshot shows a modal window titled "Add User" with a close button in the top right corner. Below the title bar, there are four input fields stacked vertically. The first is labeled "Email" and contains the text "jsmith@example.com". The second is labeled "First name" and contains "John". The third is labeled "Last name" and contains "Smith". The fourth is labeled "Role" and is a dropdown menu currently showing "-- SELECT --". At the bottom of the form, there are two buttons: "Close" on the left and "Add User" on the right.

2. Enter email address for the new user.
3. Enter First name of user.
4. Enter Last name of user.
5. Select the desired role for the user.
6. Click **Add User** to save the new user.

Note: An email is sent to the new user to verify the email address and complete the process. Upon receiving the email, the user will create their account credentials.

You have added the user from the *Users* tab successfully.

Chapter 3: Using PSA Integration

UDP Cloud Direct Data Protection supports integration with Autotask and ConnectWise PSA solutions. Integration is configured through the *PSA Integration* tab.

Chapter 4: Using Branding

UDP Cloud Direct Portal supports branding of the name and email address for emails delivered to customers. It is also possible to specify the URLs to view logs and configure the backup agent.


Chapter 5: Using Billing Tab

The *Billing* tab provides information regarding invoices and payment information for the UDP Cloud Direct Partner Account.

Chapter 6: Using Arcserve Knowledge Base

Arcserve [Knowledge Base](#) provides a repository of product documentation and helpful articles. You can search on key terms, and will be presented with related information to provide help and guidance.

Chapter 7: Accessing Release Notes

The Release Notes provide information on new features and functionality added to the product. The release notes may be found by clicking on the  icon.

