

The cover image features a blue background with a central white text box. The text reads "SmartFile Virtual Backup Appliance" in a large, bold, white font, with "Quick Start Guide" in a smaller, italicized white font below it. In the background, there are several server rack units, some of which are highlighted with a blue glow.

SmartFile Virtual Backup Appliance

Quick Start Guide

The SmartFile Backup solution is simple. You buy a pair SmartFile Backup Appliances; one for onsite and the other for remote offsite. Connect both to your LAN for the initial backup which may be very large. After the initial backup, relocate the Offsite SmartFile to a remote location. The Onsite SmartFile will continue to perform the incremental backup to the remote Offsite SmartFile.

Getting Started

PREREQUISITES

1. Install VMware Player on a desktop computer in your office network. VMware Workstation may also be used.
2. Download SmartFile Virtual Backup Appliance software (SFBV-xxxx.rar), where xxxx depends on the appliance size.

INSTALLATION

1. Extract SFBV-xxxx.rar onto a local disk or a NAS device, for onsite backup. Make sure there's enough space on the disk for the maximum size of the backup appliance downloaded.
2. Open VMware Player. Select "Open a Virtual Machine". Locate the file "SmartFilerOS" under the folder SFBV-xxxx from the extracted location. Select the file and click "Open".
Note that the VM is added to the VMware Player library with its default name.
3. Click "Edit virtual machine setting". In the Virtual Machine Settings window, choose the "Options" tab. Select the "General" option; in the right pane change the Virtual machine name from "SmartFilerOS" to "SmartFiler Onsite". Click OK.
4. Play the SmartFiler Onsite virtual machine. Choose the "I copied it" answer if prompted by VMware Player.

CONFIGURING NETWORK SETTINGS AND SMARTFILER LOCATION

1. Once the console login screen appears, login to SmartFile with the following credentials:
username: smartfiler **password:** smartfiler
2. In the SmartFile Configuration Menu, choose option 1 to "Configure All".
3. Provide the IP address, Mask and Gateway settings according to your network. Verify the settings and type "yes" to confirm and proceed with the configuration.

- Next, configure this SmartFiler as an Onsite SmartFiler when prompted with the question, “Is this an Offsite SmartFiler? (Y/N)” by typing “N”.
NOTE: Only network configuration via console login needs to be done for the Offsite SmartFiler. All other configurations are done only on the Onsite SmartFiler.
- On the next screen, select the time zone according to your location.
NOTE: Choose the same time zone for both SmartFilers even if they are in two different time zones
- Choose option 6 to quit the configuration menu. (The system will automatically log you out).
- Minimize the VMware Player window; let the Onsite SmartFiler VM continue to run.

CONFIGURING THE OFFSITE SMARTFILER

Extract the SFBV-xxxx.rar again, this time onto a removable USB or NAS device for offsite backup. Make sure there’s enough space on the disk for the maximum size of the backup appliance downloaded. Repeat the steps listed in the INSTALLATION section for the Offsite SmartFiler. **NOTE:** Rename the VM as SmartFiler Offsite; complete the configuration making sure to specify this VM as an offsite appliance (Step 4 above).

ACCESSING THE SMARTFILER USER INTERFACE USING A WEB BROWSER

- From any computer on the same network, open a web browser and type in:
The IP address of the Onsite SmartFiler:22280 in the URL address bar.
- On the SmartFiler Welcome screen, Click on the “Login to SmartFiler”.
- Enter the following credentials to login to the SmartFiler Web User Interface.
username: admin **password:** admin

NOTE: Enter the Registration information when prompted to continue with configuration of SmartFilers

Pairing Onsite and Offsite SmartFilers

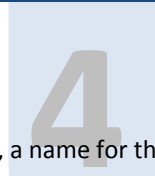
- From the top menu bar on the SmartFiler Web UI, click on the tab “Advanced Options”.
- From the Advanced Options menu bar click on the tab “Pair Onsite-Offsite”.
- Type the LAN IP addresses of the Onsite and Offsite SmartFilers if they are paired for the first time. Type the WAN IP addresses if the Offsite SmartFiler has been relocated outside of the LAN.
NOTE: The Onsite and Offsite SmartFilers must be connected in a LAN for initial pairing.
- Select ‘First Time’ from the pull-down menu for the initial pairing. Select New Location if the SmartFilers were previously paired and relocated to a different network.
NOTE: If the SmartFilers are on different networks behind a Firewall, then the Firewall must be configured to forward SSH port (Default:22222) to the respective SmartFilers.
- Click on “Pair SmartFilers” to initiate pairing.
NOTE: The two SmartFilers exchange SSH keys during the process of initial pairing. This enables the two SmartFilers to communicate securely and transfer encrypted data.

Selecting Windows Computers from the Network for Backup

- From the top menu bar on the SmartFiler Web UI, click on the tab “Advanced Options”.
- From the Advanced Options menu bar click on the tab “Configure Windows Backup Folders”.
NOTE: You can configure Network Backup only from the Onsite SmartFiler
- Provide the Windows Server IP Address, Server Name, Username for the Windows Shared Folder, Password and the Windows Shared Folder Name.
- Click on “Configure Windows Folder” to complete the configuration.
- Repeat these steps for all Windows computers on the network that need to be backed up.

Selecting Unix and Mac Computers from the Network for Backup

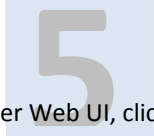
1. From the top menu bar on the SmartFiler Web UI, click on the tab “Advanced Options”.
2. From the Advanced Options menu bar click on the tab “Configure NFS/UNIX Backup Folders”.
NOTE: You can configure Network Backup only from the Onsite SmartFiler
3. Provide the Unix server IP address, Server name, Absolute path name of the NFS exported directory, a name for the mount point on the SmartFiler.
NOTE: Any NFS/UNIX/Mac folder that needs to be backed up should be first exported from the respective Unix server with at least Read access for the SmartFiler. The exact procedure and syntax for exporting directories depend on the flavor of Unix.
4. Click on “Configure Unix Server Backup” to complete the configuration. To add more Unix servers, click on the Add More Unix Directories and repeat the steps above.



Configuring Backup and Snapshot Policy

BACKUP POLICY

1. From the top menu bar on the SmartFiler Web UI, click on the tab “Backup Policy”.
NOTE: You can configure Backup Policy only from the Onsite SmartFiler
2. In the Backup Policy page specify your backup and snapshot schedule and retention policy.
3. Configure or Disable Backup - choose an option (Onsite Only, Onsite and Offsite, Offsite Only or No Backup)
4. Daily Backup Time – Select time start daily backup
5. Retain Daily Backups for – Type number of weeks you would like to retain the daily backup data.
6. Weekly Backups – Select “Yes” if you would like weekly backups too.
7. Backup Weekly on – Select a Weekly Day for Backup
8. Retain Weekly Backups for – Type the number weekly backup data to retain.
9. Database Backup – Select “No”. To enable Database Backup see document at <http://www.smartpick.com/UsingBackupExec.html>
10. Click on “Change Configuration” button.



SmartFiler Backup Appliance

Dashboard Backup Policy Restore Data Delete Backups Advanced O

Onsite

Configure Backups and Snapshots

Backup Options

Configure or Disable Backup Onsite & Offsite

Daily Backup Time 4 50 PM

Retain Daily Backups for 2 Week(s)

Weekly Backups Yes

Backup Weekly on Mon

Retain Weekly Backups for 8 Week(s)

Database Backup

Enable Database Backup Offsite No

(Exchange, SQL, SharePoint, Oracle, etc.)

Hourly Snapshots Options

HOURLY SNAPSHOT POLICY

In the Backup Policy page:

1. Enable Snapshots. Hourly Snapshots of All Data Onsite - “Yes”
2. Select the time of day for the first Snapshot.
3. Select the snapshot frequency from the drop-down menu
4. Select the number of snapshots per day.
NOTE: Allow the initial backup (First Backup) to complete before enabling the Hourly Snapshots. SmartFiler can then

Hourly Snapshots Options

Hourly Snapshots of All Data Onsite Yes

First Snapshot at 10 00 AM

Snapshot Data every 2 hours

Number of Snapshots per day 4

Change Configuration Cancel

optimize the disk space more efficiently.

NOTE: Snapshots are stored only in the Onsite SmartFiler. The Snapshots are retained for 24 hours (Until a new Snapshot is taken at the same time on the following day.)

Monitoring Backups

SmartFiler and Backup status can be monitored through the Dashboard. The display on the top left of the window shows if the Dashboard is Onsite or Offsite. Through the Dashboard you can monitor:

- Last Backup activity
- Last Snapshot activity
- Network addresses of both SmartFilers
- Disk usage
- Backup and Snapshot Policy
- Windows folders and Unix directories being backed up.
- The Dashboard of the other SmartFiler (thru the link: View Offsite Dashboard)



Moving the Offsite SmartFiler to Remote Location

SmartFiler Backup Appliance is designed to enable offsite backup of large volumes of data by performing the initial backup in a LAN and then moving the Offsite SmartFiler to an offsite location. To relocate the Offsite SmartFiler after the initial backup:

1. When a backup is not in progress, shutdown the Offsite SmartFiler through the SmartFiler UI: Advanced Options→Troubleshooting page
2. Take the removable disk where the Offsite SmartFiler resides to an offsite location of your choice; connect it to a desktop computer with Internet access; make sure that VMware Player is installed on this computer. Run the Offsite SmartFiler.
3. Assign an IP for the Offsite SmartFiler using the Console Interface. To do this login with **username:** smartfiler and **password:** smartfiler; choose Option 2 Configure Network and follow the instructions.
4. Configure the Firewall/Router to allow the SSH port used by SmartFiler (Default 22222) to be forwarded to the Offsite SmartFiler IP.
5. Repeat step above for the Onsite SmartFiler.
6. Pair the Onsite and Offsite SmartFilers using the SmartFiler web interface of the Onsite SmartFiler. (Advanced Options→Pair Onsite-Offsite)
7. Provide the WAN IP address for pairing and select the option “New Location”
8. Click on Pair Smart Filers button.

You Are Done! Your Offsite Backup will happen per your policy

Please look at the SmartFiler Backup Appliance User Guide for more detailed notes on administration of SmartFiler Backup Appliance, including how to restore data and Advanced Options. Look at the support section at www.smartpick.com.