Chapter 3 Getting Started

Overview

This chapter describes how to:

- Start Backup Director
- Perform an automatic backup job
- Monitor a job in progress
- View the results of the automatic job
- Manage the job queue
- View system messages
- View tree structures and select items
- Add users
- Customize the user interface

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Introduction

If you've installed Backup Director correctly, you are ready to begin using this comprehensive data protection tool!

To start Backup Director

1. Log in as the user you defined during installation.

2. From Windows Program Manager, click the Backup Director icon from the appropriate group window. The Control Console window appears.

Control Console

The Control Console is the nerve center of your installation. From this manager, you can understand basic information about your entire installation.

The tabs on the Control Console's Control Panel window provide brief descriptions of the managers and menu options that you can choose from Control Console. The four tabs are:

- Basics
- Status
- Reports
- Managers

Basics Tab

When you select an icon representing a basic operation or feature, a Palindrome Cue Card window briefly describes the various options and prompts you to access the appropriate manager or window. Additional cue cards further describe the operation or feature. You can choose **Close** to return to the Control Console.

Backup

The program describes different types of backup operations. At the cue card prompt, indicate whether you want to proceed with an operation. The program takes you to the appropriate manager and window. A cue card tells you how to complete the operation. For more information about specific types of backup operations:

- To back up a resource, see chapter 5.
- To back up a directory or file, see chapter 5.
- To back up all protected resources using configured automatic operations, see chapter 3. Also, Chapter 2, "Backup Concepts," contains background information about automatic operations.

Restore

The program describes different types of restore operations. At the cue card prompt, indicate whether you want to proceed with an operation. The program takes you to the appropriate manager and window. A cue card tells you how to complete the operation. For more information about specific types of restore operations:

- To restore a file or directory, see chapter 6.
- To restore an entire resource, see chapter 6.

Media and Devices

The Palindrome Cue Card briefly describes the devices that can be added, supported firmware, and AutoLoader Software. The cue card also describes the types of media it uses. At the prompt, indicate whether you want to proceed with an operation.

A cue card tells you how to complete the operation. For more information about the media and device operations:

- To format media, see Chapter 10, "Managing Media."
- To add a device, see Chapter 11, "Managing Devices."
- To change the configuration of a device or autoloader, see Chapter 11, "Managing Devices.".

Automatic Operation

The Palindrome Cue Card briefly describes the configurable parameters for automatic operations. Indicate which feature you want to configure. A cue card tells you how to configure the feature. For more information about the automatic operations parameters:

- To specify the servers and resources the program backs up, see chapter 8.
- To specify at what time and how frequently the program performs the automatic operations, see chapter 5.
- To specify which operations to perform, see chapter 4 for parameter descriptions. See Chapter 2, "Backup Concepts" for background information about automatic operations.

SmartAlerts

SmartAlerts are icons that represent types of problems that can occur at your installation. It is important to understand what they mean so that you can respond to them appropriately. Information about alerts also appears in Chapter 7, "Managing Jobs."

<u>Status Tab</u>

Items on this tab display the changing status of your installation's jobs and media.

<u>Reports Tab</u>

Items on this tab display configuration and rotation information for your installation.

<u>Managers Tab</u>

Items on this tab access other Backup Director managers.

Performing Your First Backup

Backup Director comes with default parameters already set for the system, operations, and the rotation schedule of managed media.

Automatic means that Backup Director automatically determines:

- Which operation to perform—Automatic jobs include database maintenance and backup operations. Automatic jobs perform different operations on rotation and non-rotation days.
- Which media to use
- When to perform the backup
- When to move media sets on-site and off-site

See chapter 4 for information about media scheduling (automatic job) parameters.

To submit an automatic job

1.   Load media in the backup device.

2.   From the Control Panel window, open the Operations menu and select the *Automatic* option (this option is also in Resource Manager). A prompt asks if you want the program to prompt you with questions. These questions are typically related to the media or device. The *Automatic* option is also available on the Operations menu in Resource Manager.

        If you choose **No**, you are allowing the program to determine how to proceed with a job if it encounters a problem. This is unattended mode.

        If you choose **Yes**, the program may prompt you to respond to media or hardware messages. This is attended mode. If no one is available to respond to a prompt, the program will wait indefinitely for a response.

3.   Regardless of the mode you select, an Establishing Communications window displays the job ID assigned to the automatic job and its status in the job queue. The program begins processing this job as soon as possible.

To change the schedule of the automatic job

        >   From the Status tab select the Job Queue icon. If the "Default Automatic" job is in the "ready" state, highlight it and select the **View** button. By default, automatic jobs are scheduled to begin processing at 6 p.m. Monday through Sunday. If you would like to change this schedule, see chapter 5 for information about editing the schedule parameters.

Monitoring Jobs

You can monitor jobs from any manager at the time you submitted the job or, at any time, from the Control Console. Once the program begins processing a job, you can view its progress.

The Backup Job Status window, displays general information about the resources selected for the current job and which resources the program has completed processing so far. The Backup Operation Status displays additional detail. Your first few automatic jobs will take a relatively long time to complete.

To view a backup job in progress

        >   From the Job Queue window, highlight a backup job that the program is currently servicing and choose the **View** button. The Backup Job Status window appears.

            −To view details of the current backup job, choose the **View** button. The Backup Operation Status window appears. This window displays information about the operation(s), the device being used, the activity the device is performing, etc.

            −To view details of all processes the program is running concurrently, choose the **View All** button.

> **TIP:** While you can continue monitoring job until it completes, you will improve performance by closing its job status or operation window when you are satisfied that the job is running smoothly. If you want to monitor the job later, you can view the job only through Control Console's Job Queue window.

Alert Button

The program does not force you to address an alert; you can continue doing other work. The button appears on a job status or operation status window only when an alert condition exists. This job cannot proceed until you correct a problem. When you are ready to address the alert, choose the **Alert** button to display the system message again. See chapter 7 for more information about alerts.

Abort Button

The **Abort** button on the job status windows can be used to stop the processing of a job.

To abort a job

1.   From the job status windows, choose **Abort**. A prompt appears.

2.   Confirm that you want to abort the job. Close the job status window.

<u>After the Job Completes</u>

There are several ways that you can confirm the results of an automatic job:

- **Last Automatic window**−Displays the status of the operation for each resource and automatically filters system messages for that specific automatic job.
- **System Messages window**−Displays all of the messages available for completed jobs.
- **Alerts palette**−Indicates whether a condition exists that requires corrective action.
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  File Manager−The File History window indicates the latest version recorded by the database.
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  Media Manager−The session information includes the time the session was written and the label of the media it is located on.

Last Automatic Window

To view system messages for a recent automatic job

1.   From the Status tab, choose the Last Automatic icon. The Last Automatic window appears. This window displays the results of the most recent automatic job.

2.   From the Last Automatic window, choose the **Messages** button. The System Messages window automatically filters system messages based on the job ID of the most recent automatic job.

System Messages

Backup Director records messages generated by jobs directly in the System Messages window.

The default view of the System Messages window displays all of the system messages, including linked messages, for the most recent jobs. The most recent system messages appear at the top of the list. **Linked messages** provide detailed information and appear indented below the primary message.

To view a system message

1.   Highlight a system message in the System Messages window. The full description of the system message and any recommended action appear below the system messages.

2.   Use the thumb button or arrow key to view additional available messages in the window

> If the **More** button is active, you can view more messages. Choose this button and continue to scroll through the list of available messages. Continue this method of browsing the database until you have found the items you are looking for or the **More** button is no longer active.

To view details about the message

1.   Highlight the system message.

2.   Choose the **Details** button. The System Message window appears. Use the **Next** button to view any linked messages.

Alerts Palette

The icons in the alerts palette represent types of problems that need corrective action. The alerts identify general problems relating to jobs, the job server, media, and devices. If an alert is active (appears in color), warning or error messages exist. Click the active alert to view details about the problem. Tool Tips describe the meaning of each alert.

See chapter 7 for more information about alerts.

File Manager

The File History Database automatically records files that have been backed up during automatic operations. To view the media locations of file versions, you can view the Extended History window in File Manager. This window displays the label of the media that the file version was written to and the time and date the operation occurred.

Media Manager

You can view the latest session written to a media by viewing your installation's media tree. Session information includes the time and date of the most recently written session. If Media Manager was open when you submitted the job, you must select *Refresh Media Tree* to display the latest backup job.

Custom Jobs

By using managers, you can select specific items for backup or restore operations. Jobs defined in this way are called **custom jobs**. Custom jobs provide greater flexibility than automatic jobs. They allow you to:

- Use managed or non-managed media.
- Include the entire Protected Resource List or specific resources or files.
- Perform any single operation (backup, restore, or utility operation).
- Perform the operation once, periodically, or following another scheduled job.

Selecting Items

Custom jobs require the user to select the items for an operation. The Resource, File, Media, and Device managers present items in a tree structure to illustrate a hierarchy of items.

To select a manager

> Select the Managers tab and click a manager icon. The main window appears.

> **TIP:** You can also click a manager icon from the managers palette.

Tree structures let you view how items are organized and let you hide or display details. **Expanding** displays additional detail; **collapsing** hides detail.

To collapse or expand a tree

1. Highlight an item.

2. Select the appropriate Tree menu option. Next to each item is a collapse/expand button. The plus sign (+) indicates that the highlighted item can be expanded at least one level. The minus (-) sign indicates that all of the levels have been displayed so that the only action available is collapsing.

Tagging Items

Select an item on the device and media trees (in Device Manager and Media Manager) by highlighting the icon. These managers process a single item during each operation. Tree structures with check boxes allow you to tag multiple items before choosing the operation. Tree structures with check boxes appear in Resource Manager, File Manager, and the session windows within Media Manager. See chapter 9 for information about finding, sorting, and filtering the files.

To tag an item

> Highlight the item you want to tag and click the item's check box or open the Select menu and select *Current Item*. A red "x" appears next to the tagged item.

or

> Click the item's check box.

To tag an item and all items beneath it

> Highlight the item and choose *SubTree* from the Select menu. You can also highlight the item and type "/." If you expand the item, you will see that lower-level items had red "x"s. For example, if you tag a server, all of the protected resources residing on the server are immediately tagged. If you tag a directory, its files are tagged as well.

TIP: To untag items after submitting a job or to select different items for the current job, open the Select menu and select the *Clear Tags* option.

Attended and Unattended Modes

When you submit a job, you can run it in attended or unattended mode. In unattended mode, the program determines how to complete the operation based on parameters that have been configured and information from the configured devices.

In attended mode, the program prompts you to provide instructions in order for the program to continue. Usually the program prompts the user to load the correct media for the current job.

Excluding automatic jobs, the program processes jobs in attended mode by default. When you submit a job, you have the option of choosing unattended mode by turning off the **Prompt With Questions** option. If you submit an automatic job ahead of schedule, you have the opportunity to submit the job in attended mode.

Managing the Job Queue

To view the Job Queue window

> From the Control Console, select the Status tab and click the Job Queue icon.

TIP: If you are submitting several jobs, you may want to note their job IDs. Later, you can filter the System Messages window to display only the messages of a specific job.

The Job Queue window displays all jobs in the queue. Scheduled jobs are indicated by an "alarm clock" icon. All other jobs are indicated by a "document" icon. In the normal state, these icons are yellow, if there is a problem, the icons turn red.

When a job has completed successfully, the program sends a system message indicating that the job completed successfully to the System Messages window. Unless the job repeats, the job disappears from the Job Queue window. If a jobs fails (its status is "server hold"), the program assigns the job a new job ID. The system messages describing the failure appear under the original job ID.

De-activating a Job

Administrators and operators can de-activate (or put on operator hold) jobs. You might do

this to allow a more urgent job to process, to repair a device, or retrieve the required media.

To de-activate a job

> From the Job Queue window, highlight the job you want to de-activate and select the **Hold** button. The **Status** field changes to **Operator Hold**.

TIP: To put all of the remaining jobs on hold after the program completes processing the current jobs, select the **Halt queue** option. The displayed status of the jobs does not change while the queue is halted.

Activating a Job

Backup Director puts jobs on server hold if they fail. Whether the jobs are on server or operator hold, they require a user to resubmit them. The job server processes all jobs in the order in which they were submitted or resubmitted.

To activate a job

1. If the job is on server hold (it appears with a red document or alarm clock icon on the Job Queue window), highlight it. Select the **View** button to display the system messages for this job. Resolve the problems that caused the job to fail. Refer to the *Administrator's Reference Guide*, if necessary.

2. From the Job Queue window, highlight the job on hold and choose the **Submit** button.

    > If a scheduled job has not been assigned a job ID, you can also submit for processing. If the scheduled job has been assigned a job ID, then it is already due for processing.

3. A prompt asks if you want the program to prompt you with questions (select the **Prompt With Questions** option to run in attended mode). Choose your preference. The job's state changes to "Resubmitted."

Deleting a Job

To delete a job from the queue

1. From the Job Queue window, highlight the job you want to delete. You can delete jobs with the status of "Ready," "Operator Hold" and "Server Hold."

2. Choose the **Delete** button. Backup Director asks you to confirm that you want to delete the job from the queue.

3. Choose **Yes**.

    > If this is a repeating scheduled job that has been assigned a job ID; only this repetition of the job is deleted. The job server will process the job at the next scheduled time. To permanently delete the scheduled job, highlight the scheduled job again and choose the **Delete** button. The scheduled job no longer appears in the window.

    NOTE: Backup Director does not allow you to delete your "Default Automatic" job from the database. You can put this job on

operator hold, however.

Adding Users

During the installation process, the program adds the auto login user to the Admin List and the group EVERYONE to the User List. Users are divided into three types: administrators, operators, and end users. Each has different rights and are configured in the Configuration Manager.

> **NOTE:**　　　In 4.x installations, any user who needs to submit file-level jobs (in other words, accessing File Manager) must be logged in to the tree where Backup Director is installed.

Administrators are users with full access to all six managers within Backup Director. Only administrators have access to the programs most powerful functions:

- Configuring access to users
- Configuring operations and automatic job parameters
- Defining file rules
- Labeling media
- Configuring access to other Backup Director installations

Operators have full access to Control Console and limited access to File Manager. Within Control Console, operators have the same rights as administrators and are able to manage the jobs in the queue. You can delegate job monitoring tasks to operators; in most cases they can respond to device and media messages.

End users can access File Manager only. Operators and end users are able to back up and restore directories and files for which they have rights. These users can restore data only to its original location. The Configuration Manager contains the lists of users with access to Backup Director.

See chapter 9 for information about end user access to File Manager.

Adding Operators and Administrators

To add operators and administrators

1. From the Control Console window, select the Managers tab.

2. Click the Configuration Manager icon on the Managers tab. The Configuration Manager window appears.

3. Open the Configure menu and select *Systems*.

4. Select the Admin List tab.

5. Choose the **Insert User** button and the list of servers on the network appears.

6. Click the server that the user has access to. The list of users defined on that server appears.

7. Click the user's name. The user appears on the list as an administrator.

8.   Choose a user type (**Administrator** or **Operator**).

9.   Specify which type(s) of notification the user will receive. By default, administrators are configured to receive NetWare SEND messages on warnings and errors.

>   If you specify MHS e-mail notification, also enter the user's e-mail address and the volume path of the MHS Mail server.

Adding End Users

The User List tab allows you to configure users and groups of users for access to Backup Director's File Manager. If you are adding end users or end user groups, you need to allow end users access the File History Database of their resources. See chapter 9 for information about configuring File Manager for end users.

To add a user (or group)

1.   From the Configuration Manager window, open the Configure menu and select *Systems*.

2.   Select the User List tab.

3.   Click the **Insert User** (or **Insert Group**) button. The Pick a User to Add (or Pick a Group to Add) dialog box appears.

4.   Select a user from the Pick a User to Add (or Pick a Group to Add) dialog box. The user (or group) appears in the **User** list.

See Chapter 4, "Customizing Your Installation," for information about configuring these parameters.

Customizing the User Interface

Backup Director allows you to set parameters to determine the appearance of your user interface. You can customize the display of each manager individually.

The Preferences option, available in every manager, allows you to:

•   Display or hide the status bar, which provides information about activities currently being performed through the user interface, such as building a directory.
•   Display or hide Tool Tips, which provides a brief description of the tool bar icon's function.
•   Change on-screen fonts (This option does not apply to Configuration Manager and Control Console although you can configure this option to apply to other managers).
•   Display the horizontal scroll bars.

Some options can only be configured in specific managers.

•   Save the size and position of all windows. When you next open the specific manager, the program displays the windows in the same size and in the same position as they were when you exited.

- Display the alerts and managers palettes throughout program and display the opening screen (available only in Control Console).
- Configure end user notification (available only in File Manager)
- Display the drive bar (available only in File Manager).
- Configure the end user's workstation names (available only in File Manager).
- Configure notification for end users (available only in File Manager).

To configure display preferences

1. From any manager, open the File menu and select *Preferences*. The Preferences dialog box appears.

2. Set your preferences.

3. Choose **OK** to save your preferences.

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