



## Appliance Hardware Upgrade Implementation Checklist

A Unitrends appliance hardware upgrade implementation requires the installer to perform the necessary steps to put the Unitrends data protection system into operation. The existing Unitrends appliance will remain on the network to be used for recovery until the replacement appliance is fully implemented and contains a backup history matching the licensed retention days (up to 90 days). This document is a checklist used to:

- Verify certain information is available, and certain processes are completed prior to the installation activities to ensure a smooth deployment.
- Identify the major activities and options that are required as part of the installation.
- Validate that each required component of the checklist is completed.

|                                |               |
|--------------------------------|---------------|
| <b>Customer Identification</b> |               |
| <b>Company:</b>                |               |
| <b>Location:</b>               |               |
| <b>Project Leader:</b>         | <b>Phone:</b> |

### Pre-Installation Checklist:

The following list of items needed to be acquired to avoid unnecessary delays in the installation process.

1. A static IP address for the appliance (or two IP addresses if intending on using both of the onboard NICs), the IP address(s) of the DNS server(s), the IP address of the gateway, and the subnet mask. It is recommended that the IP address(es) and hostname of the existing appliance be used by the replacement appliance. The existing appliance should receive a new hostname and IP address.

|                                 |  |  |
|---------------------------------|--|--|
| IP Address(s) for new appliance |  |  |
| IP Address(s) of DNS Servers    |  |  |
| IP Address of Gateway(s)        |  |  |
| Subnet Mask(s)                  |  |  |
| Hostname for new appliance      |  |  |

|                                 |  |  |
|---------------------------------|--|--|
| IP Address(s) for old appliance |  |  |
| Hostname for old appliance      |  |  |

2. The name and/or IP address of an email server so the appliance can email reports (and the license request for registration), e. g. exchange.unitrends.com. Please note that it may be necessary to ask the mail server admin to allow the appliance (by name or IP address) to send emails and use the mail server as a relay.

|  |  |
|--|--|
| Email Server information (e.g . mail.cust.com) |  |
|--|--|

3. Review the "Quick Start Guide" that comes with the appliance.

### Existing Appliance Management

The Unitrends appliance to be replaced can stay on the network and available to provide data recovery services for up to 90 days after receipt of the replacement appliance. This allows ample time to implement the new appliance and to build a backup history that matches the licensed retention days. It is recommended that the hostname and IP address of the existing appliance be changed and that



the new appliance be added to the network using a hostname and IP address known to DNS (if applicable) and the clients being backed up. Doing this will keep configuration changes on the clients to a minimum.

## Installation Process and Appliance Deployment Check List

The major service components and minimum service requirements are listed below. Please check  or initial the appropriate box after each required item is completed and sign the document at the end (if implementation is being performed by a Unitrends or Unitrends partner engineer). Required service components that cannot be performed or are deferred to a later time should be noted in the comments section provided.

| Required  | Service Description   | Complete                 |
|---|---|--------------------------|
| <b>Backup Strategy Design &amp; Review</b>                  |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Complete the following strategy design and review steps: <ul style="list-style-type: none"> <li><input type="checkbox"/> Review current backup schedules and determine if changes need to be made or if the same strategy will be used.</li> <li><input type="checkbox"/> Design backup schedules for clients to be protected.</li> <li><input type="checkbox"/> Determine files to be excluded from master and incremental backups and files to be included in selective backups (if applicable). Review selection lists (or backup profiles) on the DPU being replaced.</li> <li><input type="checkbox"/> List all database's to be backed up including Microsoft SQL databases and Microsoft Exchange Information Stores.</li> </ul> | <input type="checkbox"/> |
| <b>DPU Hardware Installation</b>                            |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Complete the following appliance hardware installation steps: <ul style="list-style-type: none"> <li><input type="checkbox"/> If attaching a multi-drive archiving unit, move the Infiniband adapter from the old to the new appliance. This step must be coordinated with Unitrends support.</li> <li><input type="checkbox"/> Mount appliance in rack, if applicable; connect power and connect physical network.</li> </ul>  | <input type="checkbox"/> |
| <b>Existing DPU Hostname and IP Address Change</b>          |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Complete the following existing appliance hardware configuration steps: <ul style="list-style-type: none"> <li><input type="checkbox"/> Change the existing appliance's hostname (for example, if the hostname is backup, change this to backup-old).</li> <li><input type="checkbox"/> Change the existing appliance's IP address to a new address available on the network.</li> <li><input type="checkbox"/> Disable backup schedules on existing appliance.</li> </ul>  | <input type="checkbox"/> |
| <b>DPU Base Configuration</b>                               |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Complete the following appliance base configuration setup steps: <ul style="list-style-type: none"> <li><input type="checkbox"/> Configure appliance onto network using the Configure system in the Rapid Recovery Console (<b>refer to the "Quick Start Guide"</b>) to assign host name, IP address, Gateway information. Use the hostname and IP address of the appliance being replaced (assuming the previous checklist step was taken).</li> <li><input type="checkbox"/> Assign root password, set system time, and setup Smart Relay Host for e-mail of alerts and reports.</li> <li><input type="checkbox"/> Configure disk controller monitoring software utility on DPU 2000 or 3000 systems.</li> </ul>                      | <input type="checkbox"/> |

| Required  | Service Description   | Complete                 |
|---|---|--------------------------|
| <b>Backup Professional Configuration</b>                    |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Complete the Backup Professional (BP) configuration setup as follows: <ul style="list-style-type: none"> <li><input type="checkbox"/> Verify BP software version, install updates, as required, and complete software licensing.</li> <li><input type="checkbox"/> Create devices for backup and BareMetal storage (if more than one disk device is desired). It is recommended that additional devices not be created.</li> <li><input type="checkbox"/> Verify device used for existing SQL database backups exists on new DPU (if not using the D2DBackups default device).</li> </ul> | <input type="checkbox"/> |
| <b>Client Registration and Backup Schedule Creation</b>     |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Register clients to the DPU as follows: <ul style="list-style-type: none"> <li><input type="checkbox"/> Register client to DPU using Configure-&gt;Clients in the RRC.</li> <li><input type="checkbox"/> Configure client's schedule components - selection lists, options and calendars.</li> <li><input type="checkbox"/> Setup client backup schedules. Configure e-mail notification when creating schedules.</li> <li><input type="checkbox"/> Create BareMetal backup schedules.</li> </ul>   | <input type="checkbox"/> |
| <b>Client File System Backup and Restore Test</b>           |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Conduct file system backup and restore test on each installed client system as follows: <ul style="list-style-type: none"> <li><input type="checkbox"/> Perform manual backup (master or selective) to the DPU.</li> <li><input type="checkbox"/> Verify existence of the backed up data.</li> <li><input type="checkbox"/> Perform selective restore of a sample file set to client.</li> <li><input type="checkbox"/> Verify accuracy of the restored data.</li> </ul>  | <input type="checkbox"/> |

| <b>Database Implementation Option</b>                       |  |                          |
|---|--|--------------------------|
| Required  | Service Description  | Complete                 |
| <b>Client Software Installation and Configuration</b>       |  |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Install and configure databases (e.g. SQL, Exchange, GroupWise) for backup to the DPU as follows: <ul style="list-style-type: none"> <li><input type="checkbox"/> Install client software on customer database system and/or applicable scripts on DPU (if necessary).</li> <li><input type="checkbox"/> For Exchange information store backup, create a Samba share on the DPU using the command dpu samba.</li> <li><input type="checkbox"/> Verify backup device used by existing SQL database backup schedules exists on the new DPU (if applicable).</li> </ul> | <input type="checkbox"/> |

| Database Backup Schedule Creation                           |   |                          |
|---|---|--------------------------|
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Create database backup schedules: <ul style="list-style-type: none"> <li><input type="checkbox"/> For Exchange, configure information store backup using the Exchange Agent on the client.</li> <li><input type="checkbox"/> Create backup schedule on the DPU that uses pre-backup commands to backup information store.</li> <li><input type="checkbox"/> For SQL server database backup, save SQL database backup schedules to new DPU.</li> <li><input type="checkbox"/> Ensure active databases are excluded from file level backups.</li> </ul> | <input type="checkbox"/> |

| Archiving Implementation Option                             |   |                          |
|---|---|--------------------------|
| Required  | Service Description   | Complete                 |
| <b>Archiving</b>  |   |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Configure backup archiving to disk or tape: <ul style="list-style-type: none"> <li><input type="checkbox"/> Create archive profile.</li> <li><input type="checkbox"/> Schedule archive.</li> <li><input type="checkbox"/> Run archive process.</li> <li><input type="checkbox"/> Demonstrate restore from archive.</li> </ul> | <input type="checkbox"/> |

| Returning Old Appliance to Unitrends                         |  |                          |
|--|--|--------------------------|
| Required   | Service Description  | Complete                 |
| <b>Preparing Appliance for Return</b>                        |  |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No  | To wipe data from the old appliance, complete the following step: <ul style="list-style-type: none"> <li><input type="checkbox"/> From a command prompt on the <b>OLD</b> appliance, run these commands:               <pre>fuser -km /backups umount /backups dd if=/dev/zero of=/dev/vgbackup/lvbackup count=10240</pre> <p><b>Note:</b> This will remove all data from the appliance's /backups file system.</p> </li> </ul>  | <input type="checkbox"/> |
| <b>Packaging Appliance for Return and Shipping Appliance</b> |  |                          |
| <input type="checkbox"/> Yes<br><input type="checkbox"/> No  | To package the appliance for return to Unitrends, complete the following steps: <ul style="list-style-type: none"> <li><input type="checkbox"/> Call Unitrends at 803-454-0300 to order packaging materials.</li> <li><input type="checkbox"/> Pack appliance in box using necessary packaging materials to avoid shipping damage.</li> <li><input type="checkbox"/> Ship package to Unitrends using the following address:               <p style="margin-left: 40px;"><b>Doug Scott</b><br/> <b>Unitrends</b><br/> <b>Computer Distribution</b><br/> <b>206-A Business Park Boulevard</b><br/> <b>Columbia, SC 29203</b></p> </li> </ul> | <input type="checkbox"/> |