

# PresSTORE

powered by archiware

First Steps





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## 1 Installation

This section describes how to install PresSTORE on Mac OS X, Windows, Linux and Sun Solaris platforms.



These installation notes are intended for system administrators with a solid knowledge and understanding of the Unix commands and must be executed by the root user.

### 1.1. Overview

Installing PresSTORE incorporates several steps. It is recommended to read through this section before attempting to install the software.

1. Have your installation files or installation media at hand:
  - CD-ROM mounted in a local drive
  - file downloaded from the Internet.
2. You will require at least one PresSTORE license. If you wish to test the software in its full functionality, obtain a demo license.
3. Before starting the installation, please make sure that the system requirements (as described below) are met.
4. Depending on the license, PresSTORE will involve diverse system resources described below that you need to consider.
5. Follow the steps as described in the installation sections below.

### 1.2. System Requirements

PresSTORE is available for the following platforms and operating systems:

- Mac OS X from 10.4
- Windows x86 and x64 from 2003 or XP
- Linux (Kernel from 2.6.4, x86 or x64 with 32 bit shared libraries)
- Solaris Sparc from Solaris 2.8; or OpenSolaris from 10
- Solaris Intel from OpenSolaris 10

PresSTORE is released for the following file server products:

- Helios EtherShare und PCShare 3.1+
- Xinet Fullpress 12.0+
- NetAtalk 2.0+
- Windows Services for Macintosh

For PresSTORE Backup2Go Server Setup:

- Mac OS X from 10.5
- Solaris Intel or Sparc from OpenSolaris 10

### 1.3. System Resources

Depending on the license, PresSTORE will involve diverse system resources. The following section describes all the necessary system resources required by PresSTORE. However, the requirements on the CPU as a resource are not mentioned here, since those vary widely with the system configuration. Please note, that the system load can be considerably high during a backup or synchronize run, since they involve a lot of I/O read and write operations that require system calls to be executed.

#### Disc Space

To ensure an optimal backup, PresSTORE needs sufficient disc space available for its use.



It is recommended to configure the program and index areas on backed up file systems, for example a mirrored disc or a RAID system. This has the advantage that a crash of the disc does not influence the backup or, more importantly, the restore function.

During installation, an application and an index directory are created. The application directory contains all the programs, libraries and protocols. At least 250 MB of disc space are recommended. The installation script suggests a directory with sufficient disc space.

The index directory contains the configuration files and the backup indexes. Each file or directory that is backed up has a corresponding entry in the index, so that a search can be performed later. The amount of disc space depends on the number of files to be backed up and the length of time for which the file entries are to be kept in the backup index. On average, 1 KB for each file or a copy of it is required. This number can vary depending on the length of the file names, directory structure and depth.

An entry in the archive index needs around 1.5 KB. When additionally saving the thumbnails/previews, on average 20 KB per entry are required.

Example: A disc contains 100,000 files. These files have to be recoverable for at least one month.

100.000 Files x 1 KB x 4 Weeks = 400 MB



## Main Memory

Main memory requirements depend on the number of devices which PresSTORE has to service in parallel.

Example: A changer with 3 DLT drives

PresSTORE application server: 20 MB

3 x 10 MB for the backup server: 30 MB

Total: 50 MB

## Backup Devices

PresSTORE requires one or more drives attached to the system it is installed on. Any SCSI II or III conforming drives common to the corresponding operating system are supported. LTO, AIT, DLT and DAT tape drives have been tested and qualified. As an alternative, PresSTORE can save data into container files on the local hard disk.

## Media Libraries

A media library or changer is required where larger amounts of data have to be backed up, in order to enable fully automatic runs. A wide range of devices is supported.

## 1.4. The Mac OS X Installation

Archiware makes PresSTORE available both on CD-ROM and online. The installation file is packed and has the format 'awpstxyz.dmg'. The letters 'xyz' stand for the given PresSTORE version. After mounting the disc image, the program 'awpstxyz.pkg' automatically starts the PresSTORE installation.

In case you are upgrading from an earlier version of PresSTORE, please see Section 1.7, Upgrading to PresSTORE 4.

The installation program automatically copies all the required modules into the PresSTORE home directory, '/usr/local/aw'.

## 1 Installation

1. Begin installing on Mac OS X. You will be asked for your user name and password. Please enter and confirm with 'OK'.



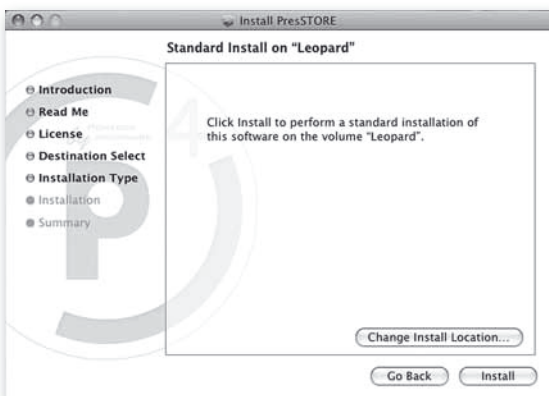
2. This window displays all the installation steps. Please click 'Continue' to proceed.



- Please read through the License Agreement and familiarize yourself with the terms of use and of the application of PresSTORE. If you own a full or a time limited PresSTORE license, click 'Continue' followed by 'Accept'.



- Please choose the target volume where to install PresSTORE and click 'Continue'. **Please note:** A PresSTORE server requires additional disc space for managing and storing the backup and archive indexes. See Section 1.3, System Resources.



- Following a successful PresSTORE installation, you will continue to either configure the server using a browser or add the just installed client to the client resources in the PresSTORE server.

### 1.5. The Windows Installation

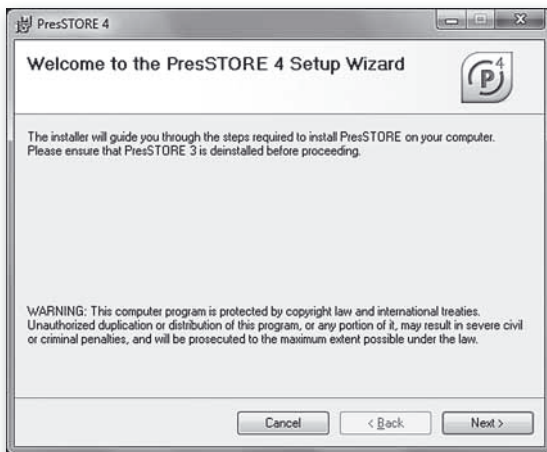
Archiware makes PresSTORE available both on CD-ROM and online. The installation file is packed and has the format 'awpstxyz.msi'. The letters 'xyz' stand for the given PresSTORE version. The installation is done by the Windows Installer by simply double-clicking on the installation file.

In case you are upgrading from an earlier version of PresSTORE, please see Section 1.7, Upgrading to PresSTORE 4.

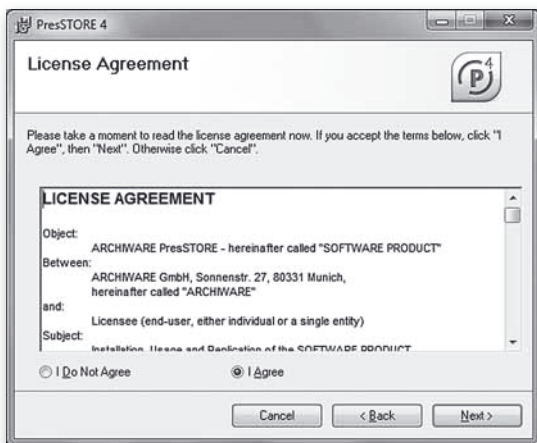


Administrator access rights are required to install PresSTORE.

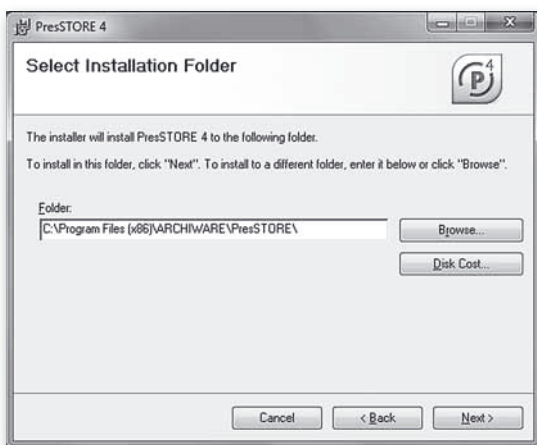
- After starting the installer, please click 'Next' to continue.



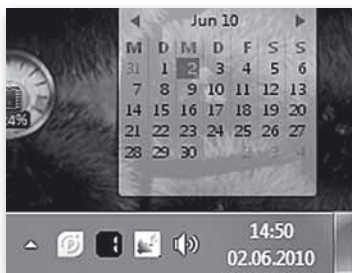
- Please read through the License Agreement and familiarize yourself with the terms of use and of the application of PresSTORE. Accept the License Agreement with 'I agree' or exit the installation.



- To accept the suggested installation path, click 'Next'. To choose another path, click 'Browse'.



4. PresSTORE is installed and started as a service. The default browser port is set to 8000. Subsequently, the PresSTORE Server Manager is started.



A green icon indicates that PresSTORE is running, a red icon, that PresSTORE could not be started. The log files stored in `log\lexsrv.log` and `log\install.log` in PresSTORE's home folder contain additional information.

5. To continue with the configuration, right-click the PresSTORE Service Manager icon in the task bar and click 'Start browser'. This step is not necessary when installing a client.

### 1.6. Solaris and Linux Installations

This section describes:

- Installation requirements
- Mounting the PresSTORE CD
- Creating an installation directory
- Copying the installation file
- Unpacking the program directory structure
- Starting the installation script

In case you are upgrading from an earlier version of PresSTORE, please see Section 1.7, Upgrading to PresSTORE 4.

### 1.6.1 Installation Requirements

PresSTORE is available both on CD-ROM and online. The installation file is packed and has the format 'awpstxyz.taz' or 'tgz'. The letters 'xyz' stand for the given PresSTORE Version. If you downloaded PresSTORE from the web, you can directly proceed to creating the installation directory.

You can install PresSTORE only as the *root* user.

### 1.6.2 Mounting the PresSTORE CD

Normally the auto-mount process on both Solaris and Linux enable you to directly access the PresSTORE CD. Should your CD for some reason not be mounted automatically, you can issue the following commands to mount it.

Linux:

```
Linux # mount /dev/cdrom
```

Solaris:

```
Solaris # mount -r -F hsfs /dev/dsk/c0t6d0s2 /cdrom
```

### 1.6.3 Creating an Installation Directory

Please create a directory for PresSTORE taking into consideration the required disc space as described in the previous section.

Example: Let us assume that '/usr/local' is a directory on a mirrored partition with 5 GB of free space, thus satisfying the installation requirements.

```
# cd /usr/local  
# mkdir aw
```

### 1.6.4 Copying the Installation File

Having created the PresSTORE home directory, you can copy the installation file from the CD, move the downloaded file there or download the file into this directory. Please replace the letters 'xyz' in the example below with the given PresSTORE version.

```
# cp /cdrom/cdrom0/server/awpstxyz.tgz /usr/local/aw
```



Correct the source directory according to the mount point of your CD.

### 1.6.5 Unpacking the Program Directory Structure

You have to unpack the installation file before you can start the actual installation. First change to the PresSTORE home directory.

```
# cd /usr/local/aw
```

Then unpack the installation file by using the following combined commands. Please replace the letters 'xyz' in the example below with the given PresSTORE version.

```
# gzip -d < awpstxyz.tgz | tar xf -
```

### 1.6.6 Starting the Installation Script

Now you can begin the installation of the PresSTORE software. Start the installation script in the PresSTORE home directory.

```
# ./install.sh
```

Please execute in sequence all the menu points and then exit the installation with point 99.

### 1.6.7 Testing the Installation

After completing the installation, you can test the PresSTORE application server. Use the command `'start-server'` to start the server, if you have not already started it from the installation menu.

The program `'ping-server'` in PresSTORE's home directory attaches to the application server and returns connection information you will need to start a client session, as described in Section 2.1, Starting the Browser.

```
# ./ping-server server
server pid: 442 (server is running)
access url: http://192.168.12.99:8000/login (use web-browser
to connect)
```




In case the server unexpectedly does not start, the section 'Notes and Error Correction' gives useful information on how to diagnose and solve the problem.

### 1.7. Upgrading to PresSTORE 4

This section describes how to upgrade the PresSTORE Server and Client on a Mac OS X, Windows, Linux or Sun Solaris.

#### 1. Hints regarding the upgrade:

	<ul style="list-style-type: none"><li>• These installation notes are intended for system administrators with a solid knowledge and understanding of the Unix commands and must be executed by the root user.</li><li>• PresSTORE versions prior to PresSTORE 3.0 cannot be upgraded. Please either upgrade to version 3 before upgrading to P4 or remove all files created with version 2 (i.e. all index files and configuration information) and install PresSTORE 4 anew.</li><li>• A backup of the system is recommended before starting the installation. This backup should include both the PresSTORE home directory and the existing backup and archive indexes.</li><li>• Before starting the upgrade, please check if the system requirements as described in chapter 1.2, System Requirements are met.</li><li>• A downgrade from PresSTORE 4.0 to a previous version is not possible.</li></ul>
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#### 2. Program Update:

##### a. Mac OS X:

Upgrading a Mac OS X system requires the same procedure as a new installation. See section 1.4, The Mac OS X Installation. The installation procedure retains the existing configuration and index information.

##### b. Windows:

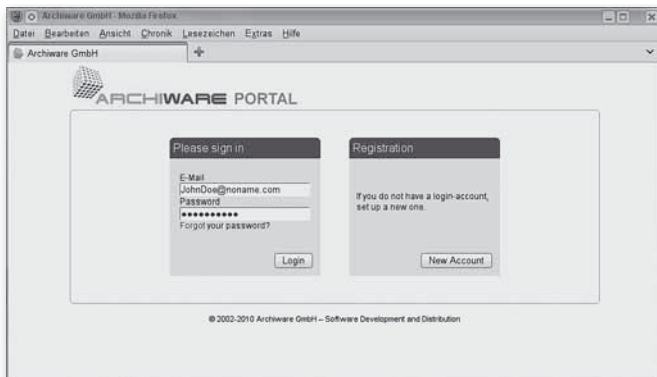
Upgrading a Windows system requires the same procedure as a new installation. See Section 1.5, The Windows Installation.

If PresSTORE version 3.x was previously installed, it has to be uninstalled first. Please read further instructions in the README file of the corresponding PresSTORE version. Uninstalling does not remove the configuration nor the index files. It is simply required, because PresSTORE 4 uses a new installation program.

c. Linux/Solaris:

Please read the README file in the ARCHIWARE home directory for an upgrade on a Solaris or Linux system.

3. You have to enter the appropriate PresSTORE licenses for P4. For requesting new activation keys or to look up the existing license, please follow the steps in the online portal at [www.ARCHIWARE.com/portal](http://www.ARCHIWARE.com/portal).



After upgrading, PresSTORE will automatically switch into a 30-day transitional period during which you are required to obtain and enter the activation keys for your new version. In this period, your product will remain active with your old license keys.

### 2 Signing In and Entering the License

This section describes the basic elements of PresSTORE and of the license activation.

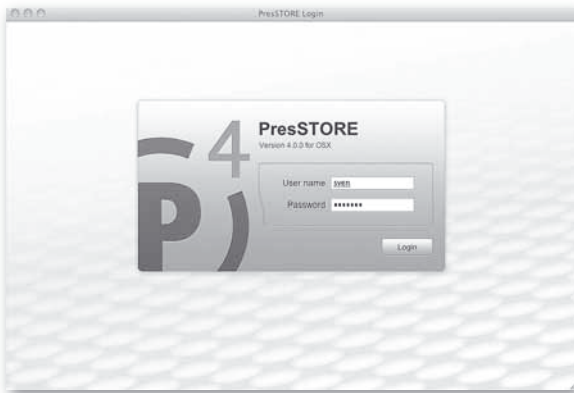
#### 2.1. Starting the Browser

PresSTORE is a web-server application running in the background. The user interface runs in a web browser such as Firefox 3.5+ or Safari 4.0+ or Internet Explorer 7.0+. To reach the interface sign in via your browser using the following URL:

`http://localhost:8000/login`

Please use *root* or *administrator* for your first session.

Once you have signed in, PresSTORE's home screen is displayed.



#### 2.2. License Activation

After signing in, you have to enter your licenses in order to be able to access all your required functions. To create a license resource, please follow these steps:

1. Click the home button in the menu bar at the top.
2. Navigate to *Getting Started > License the software* in the main window.
3. Start entering a new license by clicking the new button at the bottom left.

4. In the license window, enter the data into the corresponding fields according to your Activation Key document. The version information in the document may differ from the installed version. Nevertheless, please enter the data exactly as shown in the document. In case you do not own a PresSTORE license, you may request a trial license from the Archiware portal.

License Configuration: 1234567890

PresSTORE 3 License

Serial number: 1234567890      Status: Enabled

Apply  
Close

**Scope of License**

Selection: AWx000 - Demo Unlimited Package

Version: 0.0.0

Expires: 01-Jun-2010      Format: dd-mmm-yyyy

**System Identification**

Host ID: 5b37a6a0-0401

License key: nkpw-ahtk-esnk-kwac

✓ Resource updated.

5. Click the *Apply* button to confirm the input. A new license resource will be created. Provided the entry is correct, the license resource will be enabled.

### 2.3. A General Introduction to the User Interface

Having entered the activation keys, all the licensed modules can be accessed from the home screen of the PresSTORE interface.

The PresSTORE window consists of

- A top menu for selecting the desired module to control,
- a left sidebar menu that depends on which module has been chosen, and
- a main window, that depends on the currently selected sidebar function.

The topmost or starting point of the PresSTORE interface is the home screen:



The top menu holds the following items:

	<p>Home button – brings you back to the home screen from anywhere in the interface.</p>
	<p>Backup button – leads to all the settings required to configure and run Backup.</p>
	<p>Backup2Go button – takes you to the screens required to configure Backup2GO for portable devices.</p>
	<p>Synchronize button – allows you to set up data replication and transfers.</p>
	<p>Archive button – leads to all settings required to configure and run Archive.</p>
	<p>Restore button – allows to restore data from a backup or archive.</p>
	<p>Jobs and Logs button – allows access to logs of finished, planned and running jobs.</p>
	<p>PresSTORE button – leads to help, support and further program information.</p>

Some module icons in the top menu may be grayed out, depending on which modules are licensed. In trial mode, all module buttons are accessible.

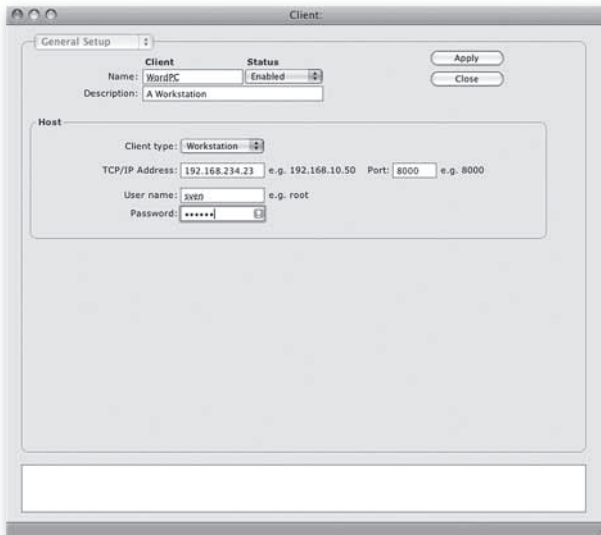
The left sidebar menu contains shortcuts to facilitate the navigation to PresSTORE's configuration pages, which can otherwise be accessed via the tree structure from the home screen.

## 3 First Steps With PresSTORE

This section shows how to set up a backup, archive or synchronization in a few steps. A detailed description of these steps can be found in Sections 6 to 11 of the manual.

### 3.1. Adding a Client

In case you plan to use a second computer in addition to the local host, the connection to that computer must be configured by adding a new client. PresSTORE must also be installed on the client computer. The procedure is the same as for the server, except that on the client computer, no license must be entered and no further configuration is required.



To configure a client for the PresSTORE server, click on Clients from the side bar menu when in the Backup, Synchronize or Archive module. It does not matter from which module you plan to use the client, the setup configures an all-purpose connection. Enter a unique name (within PresSTORE) for this client and define its connection with the IP address and port (default port is 8000) parameters. Pick a local account (user and password) on that client on behalf of which local access will be granted. Preferably, the account should be a root or an administrator account to avoid access rights problems during later use.

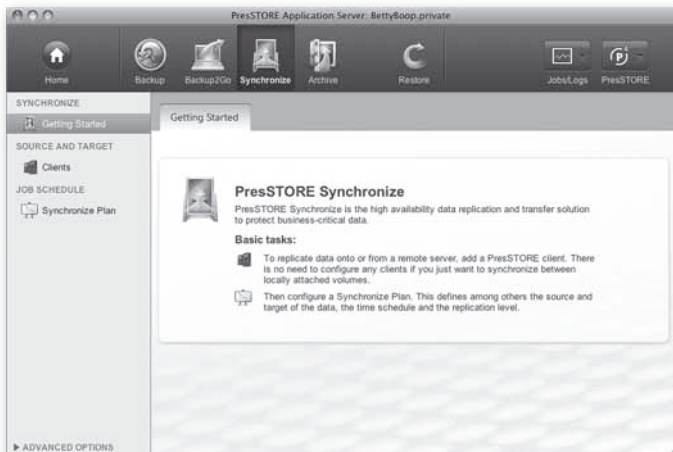
Confirm the input with *Apply* and leave the window with *Close*.

For further information about PresSTORE clients please see Section 7.11 of the manual.

### 3.2. How to Set Up a Synchronization Plan

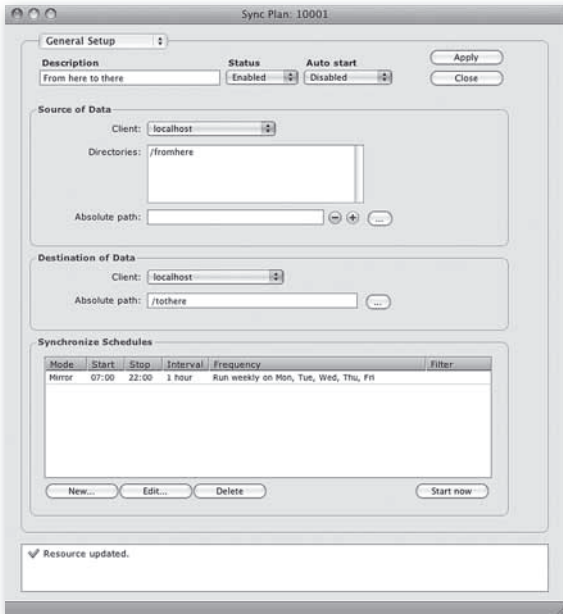
With PresSTORE Synchronize, a destination directory tree is synchronized to match all files and sub-directories of a source directory. All files on the source directory are copied to the destination in an initial step, new or changed files are transferred with later synchronize jobs.

To configure PresSTORE Synchronize, click the *Synchronize Button* from the Top Menu.



### 3 First Steps with PresSTORE

Choose *Synchronize Plans* from the left sidebar menu. Then click *New ...* in the main window.

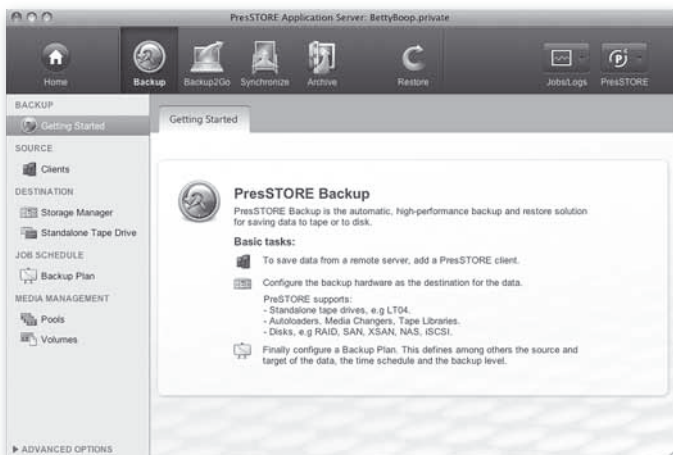


Choose a name for this plan and pick a source and destination directory on a client or on the local host. Source and Destination define where from and where to the data is copied. Save the plan with the *Apply* button.

The plan created above may now immediately be started with *Start now Mirror*. As an alternative, a time schedule can be set up to start synchronization automatically. For further information about synchronization plans refer to the manual Section 7.8.

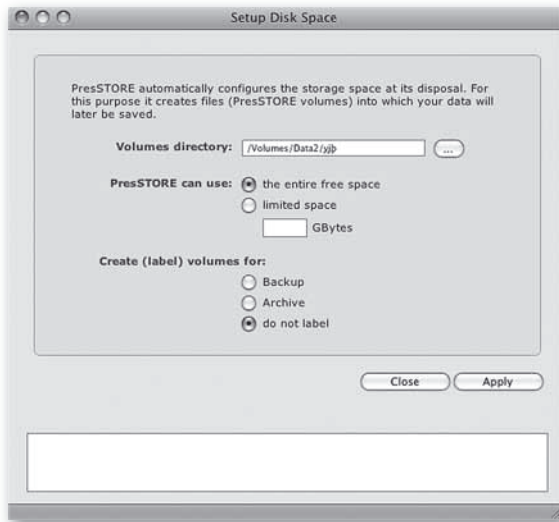
### 3.3. How to Set Up a Backup Plan

Backup plans are intended to save files or entire directory trees from the local host or a connected client. The data is saved onto a media pool, which is a set of volumes. A single backup run saves either all the data or all the data that changed since the last backup. Each backup plan is executed according to the configured schedule. To configure the Backup, select *Backup* from the top button bar.



#### 3.3.1 Setting up Disk Space for Backup

A backup requires media to store the data on. These media need to be set up before starting the backup. The setup will be demonstrated by configuring a backup to disk. To begin the setup, select the *Storage Manager* from the left side menu. Then click *New Disk Storage* at the bottom of the main window.



Select a path to be used for disk storage. Then decide whether to restrict the disc space to be used for PresSTORE or to use the entire disc. Pick *Backup* as purpose for the volumes. Confirm the input with *Apply* and leave the window with *Close*.



This completes the configuration. Two further tasks are performed invisibly in the background:

- A media pool is created to maintain the storage volumes and
- the new media are labeled, which assigns them to a media pool and prepares them for use.

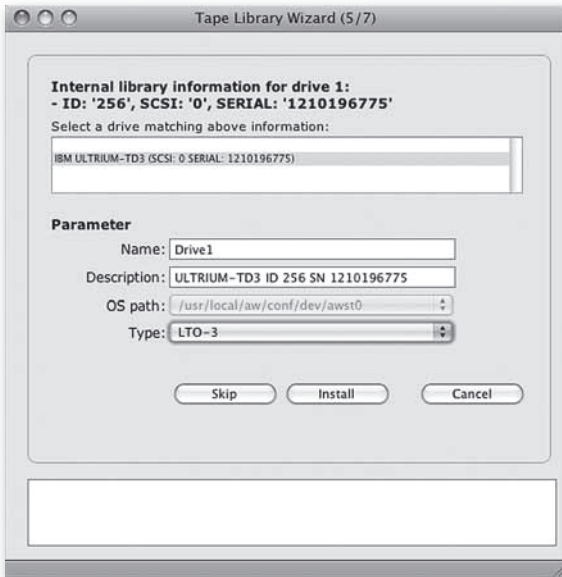


### 3.3.2 Configuring a Media Library (Changer or Jukebox)

To configure a media library device, also named changer, storage loader or tape jukebox, select the *Storage Manager* from the left side menu. Then click *New Tape Library ...* at the bottom of the main window.



While configuring the library, you will also configure each of the built in drives.



Please enter the type for each drive, for example LTO-3 or AIT-2.

After configuring the drive, the tapes can be prepared for later use by labeling them. In this step, the tapes are assigned to a media pool which sets the purpose of the tape (backup or archive). In case you skip this step, you can label the tapes later on.



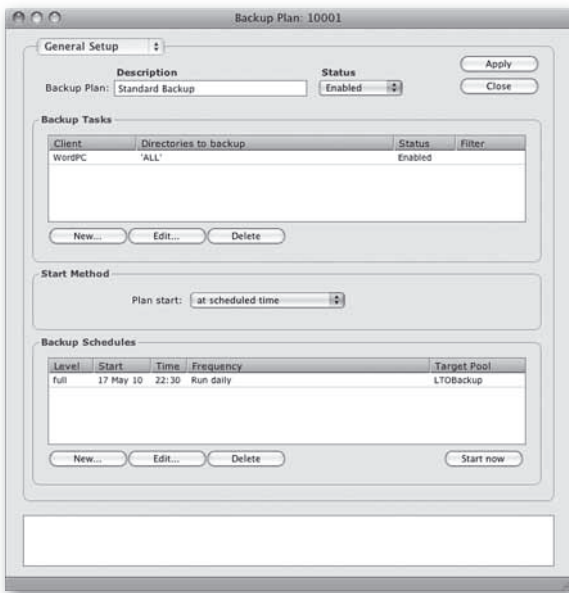
This completes the configuration. Two further tasks are performed invisibly in the background:

- A media pool is created to maintain the storage volumes and
- the new media are labeled, which assigns them to a media pool and prepares them for use.

Please find further information about storage media and their management in Sections 7.2 to 7.4 of the user manual.

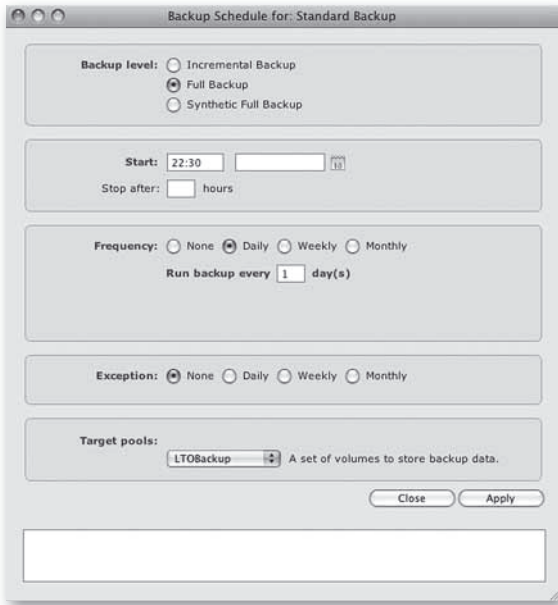
### 3.3.3 Creating a Backup Plan

Choose *Backup Plan* from the sidebar menu. In the backup manager shown in the main window, choose *New*. A new backup plan window will appear. Please enter a name for the new backup plan and save it with *Apply*.



Next, select the client(s) to back up from the *Clients* pull down menu and add them to the list with the + (plus) button. By default, the entire file system of the client is configured to be backed up. By double-clicking the client entry, you can reduce this selection and define the directories in the file system that you wish to back up.

Next, you have to create a time schedule. To do this, click *New...* in the *Backup Schedules* area.



Pick full backup for the backup level and the (automatically generated) pool *Disk-Backup* for the target pool. As a schedule example, a daily backup can be selected as shown in the image. After saving the schedule with *Apply*, the backup plan can be started immediately by clicking on *Start now*.

The backup plan is started in the background and will continue running even when the user interface is closed.

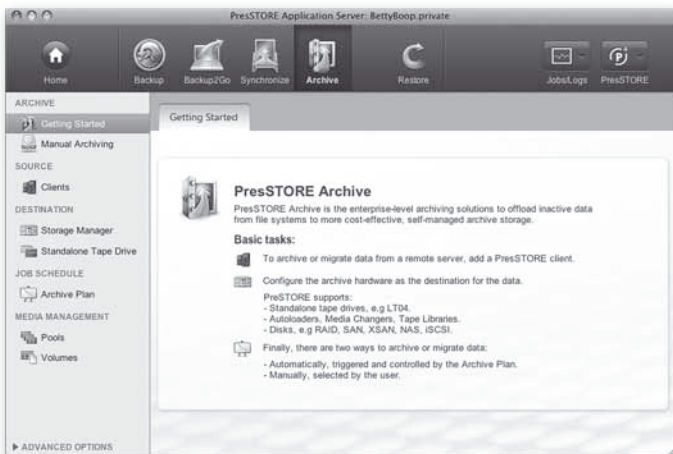


The diagram icon opens the job monitor. Click here in order to watch the running job or to check what is currently running in PresSTORE. Please find further information about backup plans in Section 7.7 of the manual.



### 3.4 How to Set Up an Archive Plan

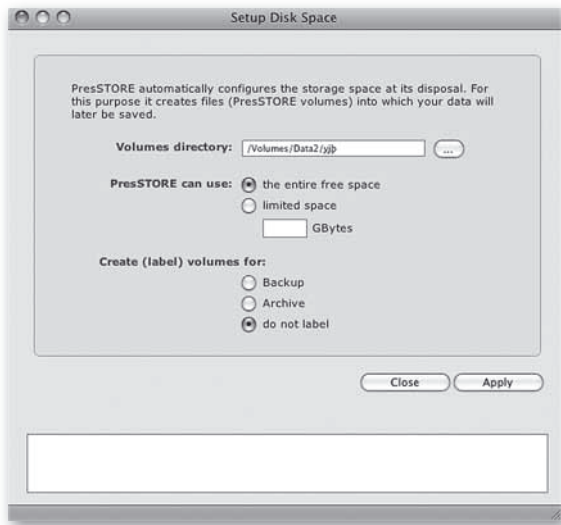
Archive plans are intended for long-term archiving of data and migrating data from on-line to off-line storage. The archive plan defines common criteria for this purpose and provides them as a common set to the user. Select Archive from the Top Menu.



#### 3.4.1 Setting up Disk Space for Archive

An archive requires media to store the data on. These media needs to be set up before starting the archiving. The setup will be demonstrated by configuring an archive to disk.

To begin the setup, select the *Storage Manager* from the left side menu. Then click *New Disk Storage* at the bottom of the main window.



Select a path to be used for disk storage. Then decide whether to restrict the disc space to be used for PresSTORE or to use the entire disc. Pick *Archive* as purpose for the volumes. Confirm the input with *Apply* and leave the window with *Close*.



This completes the configuration. Two further tasks are performed invisibly in the background:

- A media pool is created to maintain the storage volumes and
- the new media are labeled, which assigns them to the media pool and prepares them for use.

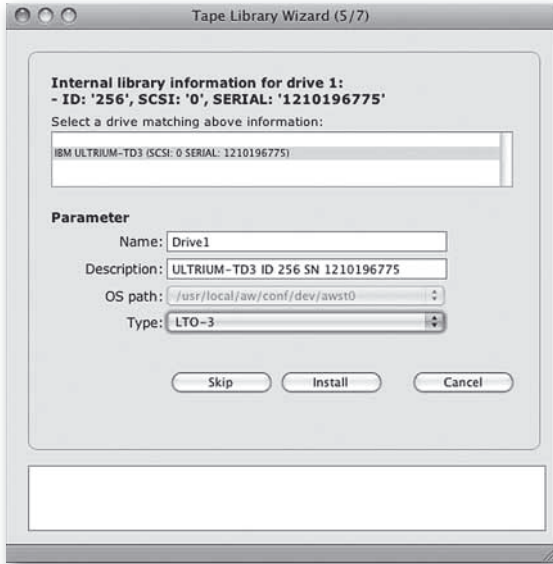


### 3.4.2 Configuring a Media Changer (Jukebox)

To configure a media library device, also named changer, storage loader or tape jukebox, select the *Storage Manager* from the left side menu. Then click *New Jukebox ...* at the bottom of the main window.



While configuring the library, you will also configure each of the built in drives.



Please enter the type for each drive, for example LTO-3 or AIT-2.

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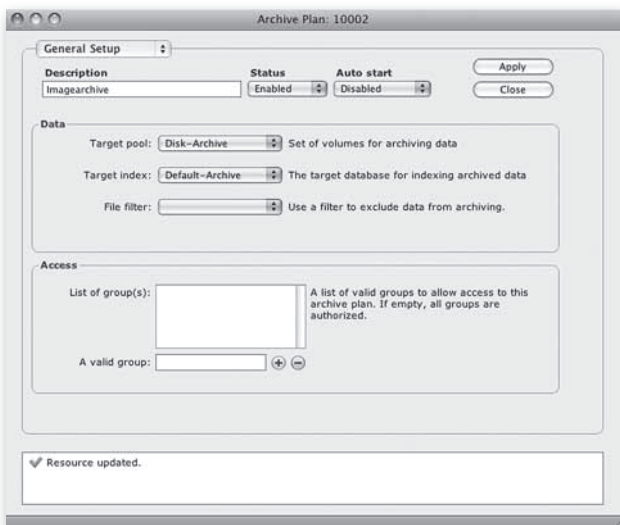
This completes the configuration. Two further tasks are performed invisibly in the background:

- A media pool is created to maintain the storage volumes and
- the new media are labeled, which assigns them to a media pool and prepares them for use.

Please find further information about storage media and their management in Sections 7.2 to 7.4 of the user manual.

### 3.4.3 Creating an Archive Plan

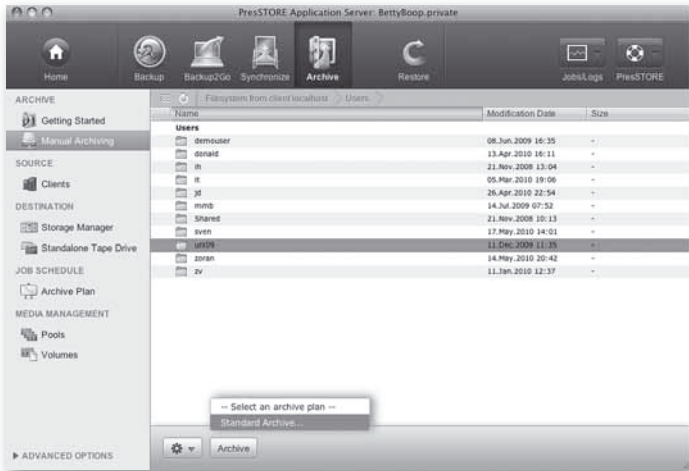
Choose *Archive Plan* from the sidebar menu. In the archive manager shown in the main window, choose *New*. The archive plan dialog window will appear:



Enter a name for the new plan. Choose the automatically generated *Disc-Archive* pool as the target pool and *Default-Archive* as the target index. Confirm the input with *Apply* and leave the window with *Close*.

### 3 First Steps with PresSTORE

The file system browsing area offers the easiest way to archive. To browse the file system, pick *Manual Archiving* in the left sidebar. Select the file system that holds the data you want to archive.



After selecting the files, click the *Archive* button to directly archive the selected files and folders with your newly created archive plan.

For further information about archive plans see Section 7.6 of the manual.

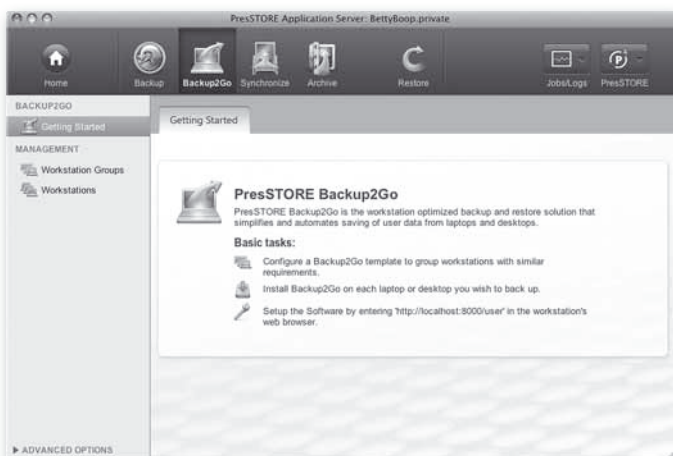


## 3.5 How to Set Up Backup2Go

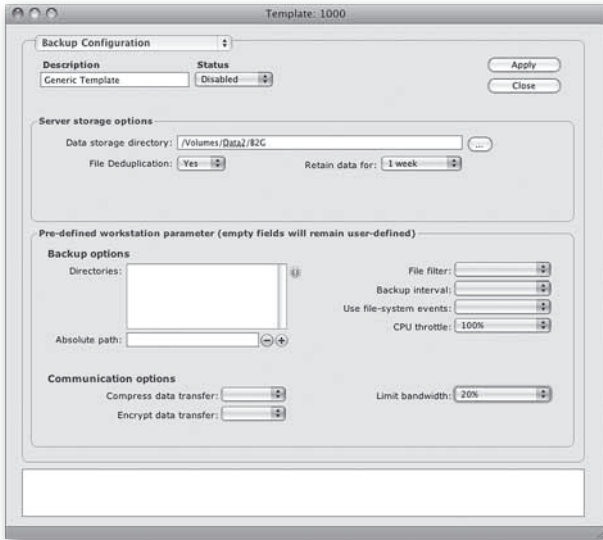
Backup2Go is an easy to use backup to disk module designed to back up workstations that are not permanently available for backup.

### 3.5.1 Setup the Backup2Go Server

Select Backup2Go from the top menu.




To prepare the Backup2Go server, choose *Workstation Groups* from the sidebar menu. Then double click *Generic template ...* in the main window.



For each new workstation that registers into the server, a new resource is created and linked to this template. The template defines the default parameters that will be used for backing up the workstation. If you wish to set parameters that differ from those defined in the template, you can set those individually in the workstation's resource on the server or on the workstation itself. Any subsequent changes to the template will reflect on the workstations linked to it.

The purpose of the *Predefined workstation parameters* section is to define the parameters of the backup, which the administrator of the backup does not wish the user to be able to change. Entries that are left blank can be defined directly in the workstation's setup. The ones defined here will override and prevent setting them on the workstation. When the directories field is left empty, which is by default, the home directory of the user that signs in to configure the local settings on the workstation is used. The *Server storage options* section defines where and for how long to store the data of previous snapshot. The current state of the file system

is indefinitely stored. These entries are mandatory. If not set in the template, these parameters must be set later on the workstation.

	<p>To make use of the full power of PresSTORE's Backup2Go, use a file system that supports snapshots to store the workstation data on the server. P4 supports ZFS (Zettabyte File System) on Solaris and the Journaled HFS Plus file systems on Mac OS X 10.5+</p>
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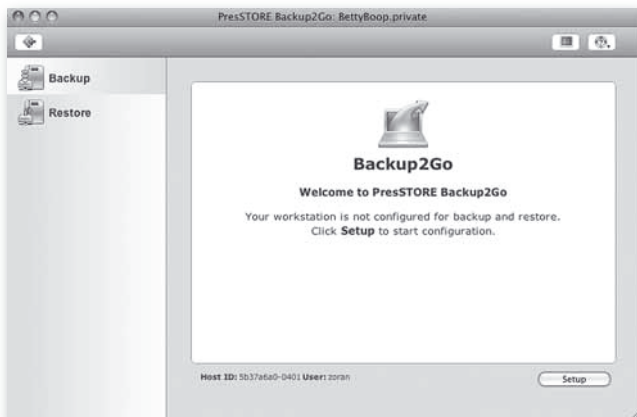
This step completes the Backup2Go server setup.

### 3.5.2 How to Set Up a Backup2Go Workstation

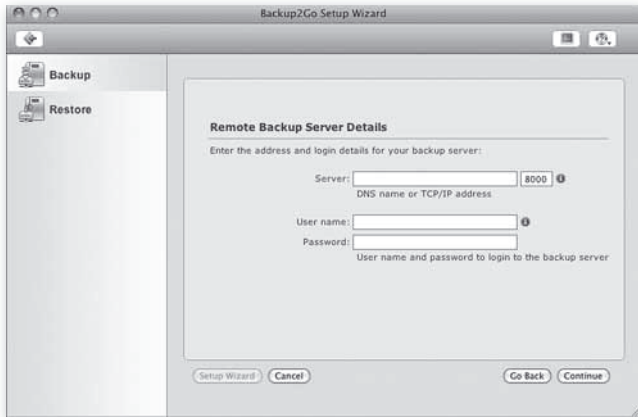
Install PresSTORE on each workstation to be backed up with Backup2Go. The procedure is the same as for the server, except that on the workstation no license and no further configuration is required, see more in Section 1, Installation.

After installing, please use a web browser (for example Safari or Firefox) and the following URL to log into PresSTORE's user interface:

<http://localhost:8000/workstation>



Click *Setup* to configure the workstation backup, which will take you to the workstation setup wizard:



To setup the required connection to the server, enter the *server name* or IP address of an existing Backup2Go server and enter the *User name* and *Password* to be used to connect to the server. This account must have login access to the Backup2Go server. The same server account is required later during restore to access the data. Click *Continue* to confirm the input.

You can define the directories that you would like to back up, provided that this field is not overridden by the administrator, who can explicitly define the directories to backup in the workstation template. By default, this field is filled with the home directory of the user that is configured to sign in on the server. To configure it, follow the wizard to the *Data to backup* section to define or modify the directories you want to include in the backup.

Check *Activate backup* and confirm the changes by clicking the *Apply* button. That's all.

The template on the server defines how often a workstation backup will be done. The backup for the workstation is run for the first time after the first such interval has expired. In case the workstation is off-line or in standby mode at the scheduled time, the backup will start as soon as the Backup2Go server becomes accessible again.

Please find more information about the Backup2Go server in the manual Section 7.12 and the Backup2Go workstation in Section 7.13.



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