Quick Start Guide

Datto BDR Needs Assessment Module

Instructions to Perform the "Quick" BDR Needs Assessment
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Overview

The “Quick” BDR Needs Assessment is a powerful tool for much more than just sizing your customer’s back-up requirements. Use it to get detailed information for upselling your services around the proper Datto solution, and to discover issues related to backups that could cause loss of data in the event of a disaster. You also get summary information on the servers and workstations on the network.

The software includes the Network Detective Application, the BDR Data Collector, and Worksheets used to collect BDR needs and set a BDR Solution Preference.

The “Quick” BDR Needs Assessment lets you:

- Quickly perform BDR Needs assessments to identify and expand BDR sales opportunities
- Identify the Risks associated with the prospect’s current BDR solution that is in place to present the business impact of system downtime and recovery time
- Generate a BDR System Sizing specification

The process to create a “Quick” BDR Needs Assessment involves creating a “Site” and executing two simple assessment steps using Network Detective:

1) Network data collection

The Network Data Collector is wizard driven and takes just a few minutes of your time to set-up. The scan itself typically takes 45-60 minutes on a 50-user network on a single subnet. You can run this from any windows system on the network with domain administrator credentials. The collection runs automatically, so you don’t have to watch it the entire 45-60 minutes.

2) Complete the BDR Needs Worksheet and the BDR Solution Preference Worksheet which take less than a minute each.
Perform BDR Needs Assessment Project Initial Set-up

1. Go to [www.rapidfiretools.com/bdr](http://www.rapidfiretools.com/bdr) to download and install the Network Detective application on your workstation or laptop (do not install at your client’s site). Then run Network Detective and login with your credentials.

2. Create a new Site by selecting the New Site option. Set the Site Name for the “Site” in Network Detective.

   ![New Site Window](image)

   Select the OK button to create the site.

Start an Active “Quick” BDR Needs Assessment Project

1. From within the Site Window, click the Start button to start the Assessment.

2. Next, select the BDR Assessment (Quick) option presented.

3. Select the Next button to continue.

4. In the Create New Assessment Window presented, use the default Label presented OR assign the Label (name) for your Assessment project by typing the name of your Assessment in the Label Name field.

5. Select the Next button to Start your Assessment.

6. Select the Finish button to complete the creation of your Assessment project.

7. Once the new BDR Assessment Project is started, a “Checklist” is displayed in the Assessment Window.
This Checklist presents the “Required” and “Optional” steps that are to be performed during the assessment process.

Throughout the assessment process you will be required to Complete the Checklist Items, in the order presented in the Checklist.

Note: The successful completion of your Assessment is dependent on the completion of each Checklist item in the numerical order as presented within the Checklist.

DO NOT ATTEMPT TO COMPLETE CHECKLIST ITEMS OUT OF ORDER
DOING SO WILL CAUSE YOU TO PRODUCE AN INVALID ASSESSMENT

You may also print a copy of the Checklist for reference purposes by using the Printed Checklist feature.

Continue to the next page to start your BDR Needs Assessment.
Perform the “Quick” BDR Needs Assessment

Execute the following steps, **IN THE EXACT ORDER DETAILED BELOW**, to perform the BDR Needs Assessment.

**Step 1 – Complete the BDR Needs Worksheet**

1. To complete the BDR Needs Worksheet, click on the selector on the left side of the InForm Bar located towards the bottom of the Assessment window to display the BDR Needs Worksheet for selection.

2. Open the BDR Needs Worksheet listed under the InForm Bar by clicking on the BDR Needs Worksheet’s name label. The BDR Needs Worksheet window will be displayed.

3. Enter Responses in the Response Field for each Topic listed throughout the worksheet in order to document the BDR needs for your client.

   Topics that require Responses are labeled with a “Required” tag next to the questions posed.

   To document the “responses” to the Instructions/Questions presented in this worksheet:
   
   A. Select and Review the “Topic”.
   
   B. Review the Topic Question or Instructions. Instructions provide guidance and are not included in the reports.
   
   C. Enter a “Response” for each of the “Required” questions.
   
   D. Select the Note icon to enter any “Notes” relevant to the topic’s response. (OPTIONAL)
   
   E. Select the Respondent icon and enter the name of individual that responded or provided information to respond to the topic’s question or requirement in the Response field. (OPTIONAL)

4. After completing the BDR Needs Worksheet, select the Save button to save your responses. Once your responses are saved, select the Close button to close the worksheet window.
5. After the BDR Needs Worksheet has been completed, the Checklist will be updated to show that the BDR Needs Worksheet has been Completed.

Proceed to the next step below to start the BDR Scan Data Collection Process.

Step 2 – Run BDR Data Collector, then Import Scan

1. On your customer’s network, download and run the BDR Data Collector on any Windows system from www.rapidfiretools.com/bdr. Alternatively, you can bring the Data Collector to your customer’s site and run from a USB drive.

2. Follow the steps outlined in Appendix A – Running the BDR Data Collector to perform the BDR Network Data Collection.

   Note: WMI must be enabled within the network to run this scan.

3. After the BDR Data Collector Scan is complete, from your laptop or workstation, run the Network Detective application, click into the Site, and select the Import Scan File option in the Assessment window to Import the Scan File into the Assessment.

   After the BDR Collector Data Scan is finished, select Import File within the Network Detective BDR Assessment Window to select the scan data file and Import the file into the Assessment.

Step 3 – Complete Backup Selection Preference Worksheet (OPTIONAL)

This OPTIONAL worksheet allows you to override the suggested Datto Model. Note: You can skip this step and begin generating reports.

1. To complete the Backup Selection Preference Worksheet, open the Backup Selection Preference Worksheet.

   The worksheet is listed under the InForm Bar located towards the bottom of the Assessment window. To open the worksheet select the Backup Selection Preference Worksheet’s name label.
2. The **Backup Selection Preference Worksheet** window will be displayed.

3. In the **Response** field, select the **Datto BDR Solution** option override that you want to assign to this assessment.

4. After completing the **Backup Selection Preference Worksheet**, select the **Save** button to save your responses. Next, select the **Close** button to close this worksheet’s window.

5. After the **Backup Selection Preference Worksheet** has been completed, the **Checklist** will be updated to show that the **Backup Selection Preference Worksheet** has been **Completed**.

### Generating Reports

**NOTE:** This step is NOT performed at the client site or network. Network Detective should be installed on your workstations or laptop. Install Network Detective from [www.rapidfiretools.com/bdr](http://www.rapidfiretools.com/bdr) if you have not already done so.

**To incorporate your company’s brand in the reports,** use the custom **Reporting Branding Preference** features in Network Detective. To learn more about how to use the **Report Branding Preference** feature, refer to the **Network Detective User Guide** available at [www.rapidfiretools.com/bdr](http://www.rapidfiretools.com/bdr).

**Follow these steps to run the BDR Analysis Reports**

1. Run Network Detective and login with your credentials.

2. Then select the **Site**, go to the **Active BDR Assessment**, and then select the **Reports** link located in the center of the **Assessment Window** in order select the reports to be generated.

3. Then select which of the **BBR Needs Assessment** reports that you want to generate.

4. Select the **Create Reports** button and follow the prompts to generate the reports you selected. *You may be prompted to add information to the report to include for whom the report is prepared.*

At the end of the report generation process, the generated reports will be made available for you to open and review.

**The BDR Needs Assessment module can generate the following reports and assessment worksheets:**

**BDR Needs Analysis Report** – Reporting showing analysis of the Backup/Disaster Recovery needs for an environment. It includes both discovered information regarding the storage needs of an environment, along with analysis of both onsite and offsite backup requirements.

**BDR PowerPoint** – PowerPoint slide deck for use in presenting your finding from the BDR Needs Analysis with your client.
**BDR Needs Assessment Worksheets** – All of the worksheets that were completed during an assessment can be generated. The generated worksheets will contain the Response input that was placed into each worksheet during the assessment process.

**Performing the “Quick” BDR Needs Assessment versus “Full” Assessment**

This Quick Start Guide focuses on performing the “Quick” BDR Needs Assessment.

For a more thorough BDR needs analysis that will scan for cloud storage (e.g. – dropbox), cloud applications (e.g. - Salesforce.com), and more, you can perform a “Full” BDR Needs Assessment as outlined in the BDR Needs Assessment User Guide available at [www.rapidfiretools.com/bdr](http://www.rapidfiretools.com/bdr).

The table below outlines the major differences between the Quick and Full assessment.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Quick Details</th>
<th>Full Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scan Types</td>
<td>Network Only</td>
<td>Network and Local Computer</td>
</tr>
<tr>
<td>Cloud Storage Opportunity Detection</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Cloud Application Usage Detection</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Non-published Local Attached Storage Detection</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Existing Backup Solution Evaluation</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>RTO Calculator</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Critical System Identification</td>
<td>Use default setting of servers as critical and workstations as not</td>
<td>Allows you to hand pick which systems are critical</td>
</tr>
<tr>
<td>Exclude Individual Volumes from Assessment</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Requires Completion of InForm Worksheets</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
Appendix A – Running the BDR Data Collector

**Prerequisite:** The BDR Data Collector scan depends on the availability of WMI within the network environment being scanned. Please verify that WMI is enabled before proceeding with the steps below.

**Steps to Perform the BDR Data Collection Process on the Network**

**Step 1 - Launch the BDR Data Collector**

The BDR Network scan is performed at your client’s site. You can bring and run the BDR Data Collector from a USB drive, or, from any Windows system, visit the RapidFire Tools software download website (www.rapidfiretools.com/bdr) and download and run the BDR Data Collector named BDRDataCollector.exe.

The BDR Data Collector is a self-extracting .ZIP file that does not install on the client computer.

To start the BDR Data Collector, right-click on the BDRDataCollector.exe and run BDRDataCollector.exe using the **RUN AS ADMINISTRATOR MENU** option. Use the **unzip** option to unzip the files into a temporary location and start the collector.

**Step 2 – Configure the BDR Data Collector Network Scan**

Starting the BDR Data Collector will present the following screen. Select the **Next** button and the **Credentials** window will be presented.

**Step 3 – Configure the BDR Data Collector Network Scan**

The Credentials window will be displayed to enable you to enter the required administrative credentials necessary to access the network environment during the scanning process. Enter the Credentials by performing these steps:

1. Enter a username and password with administrative rights to connect to a Domain Controller and Active Directory. If in a domain, clicking the **Next** button will test a connection to the a Domain Controller and Active Directory to verify your credentials.

2. Select the **Next** button.

At this point in the process, the **Local Domains** window will be presented.
Step 4 – Configure the Local Domains

For most SMB networks, simply click **Next** to gather information from ALL Domains. For larger clients you may want to narrow the scope of the assessment. If so, select the Domains to gather information by performing these steps:

1. Select Gather information for only the Domains and OUs you select, and make your selections.
2. Select the **Next** button.
3. Confirm the Domain and OU when the **Domain and OU Confirmation** window is presented.
4. Select the **OK** button to confirm the Domain and OUs you have selected.

Step 5 – Configure the Network IP Address Range to be Scanned

You may use the default **IP Range** presented and select the **Next button**, or define an **IP Range**.

You can specify an IP Range by clearing the default IP address range entry detected within the network by selecting the **Clear All Entries** option.

Next, enter the **Starting and Ending IP Addresses** for the range(s) you want to scan in the IP range field using the following format:

**Starting Address of IP Range Address**<hyphen>**Ending Address of IP Range**.

Then select the **Add** link to add the IP Range you specified.

Note that you can add multiple IP ranges if you need to scan remote locations or multiple subnets.

Scans may affect network performance. Select **Perform minimal impact scan** if this is an issue. Then select the **Next** button.

The **Verify and Run** window will be presented.

Step 6 – Verify and Run the Scan

Select the folder that you want to store the scan data file in after the scan is completed. You may change the scan’s **Output Assessment File Folder** location and **Basename** for the scan data.

Enter any **Comments** and then select **Start**. The **Collection Progress** window will then be displayed as presented below.
Note: Prior to performing Step 6 above, you can run the Pre-Scan Analyzer. The Pre-Scan Analyzer checks to verify that WMI is available. The Pre-Scan Analyzer can also identify any “unreachable” computers that should be turned on to be made accessible before you start the BDR Collector Scan, or identify unreachable computers that you need to later scan with the Computer Data Collector.

Step 7 – Monitor the Network Scan’s Collection Progress

The Network Scan’s status is detailed in the Collection Progress window.

The Collection Progress window presents the progress status of a number of scanning processes that are undertaken.

At any time you can Cancel Data Collection which will not save any data. By selecting Wrap It Up you can terminate the scan and generate reports using the incomplete data collected.

Upon the completion of the scan, the Finish window will be displayed.

Step 8 – Complete the BDR Data Collector Network Scan Process

The Finish window indicates that the scan is complete and enables you to review the scan output file’s location and the scan’s Results Summary.

Click on Done button to close the BDR Data Collector window. Note the location where the scan’s output file is stored and gather the output zip file(s) for importing into the Network Detective application.

Importing the BDR Collector Generated Scan Data

The final step in this process is to import the data collected during the BDR Network Scan into the Network Detective application in the Active BDR needs assessment.

Perform the following steps to Import the Scan Data:

1. Click on the Import Scans File button in the Network Detective Assessment window.

   The Select the Scan Results window will be displayed thereby allowing you to import the .ZIP file produced by the BDR Network Data Scan into the Assessment.

2. Browse and Select the BDR Network Scan data file from the data collection you completed at your client’s site.
3. Then click the **Next** button to import the scan data.

4. The **Network Detective Merge** window will be displayed.
   
   The success of the scan’s import will be confirmed by the **Scan Archive Created** window being displayed.

5. Select the **Finish** button to complete the scan file import process.

After the **BDR Data Collector** scan file is imported into the assessment, the **Scans** section of the **Assessment Window** will be updated to list the **Network Scans** files imported into the assessment.

In addition, the **Status and Check List** information indicators will be updated to present the assessment’s current status. Refer to the figure to the right.