



# QUICK START GUIDE

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## Unitrends BDR Quick Assessment

Instructions to Perform a Backup and Disaster Recovery Assessment

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# Overview of Unitrends BDR Quick Assessment Module

The Unitrends BDR Quick 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 solution, and to discover issues related to backups that could cause loss of data in the event of a disaster. In addition, you can gather 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 Unitrends BDR Quick 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 Unitrends BDR Quick Assessment involves creating a **Site** and executing two simple assessment steps using Network Detective:

## 1. Run BDR Data Collector with Network Scan

The BDR 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.

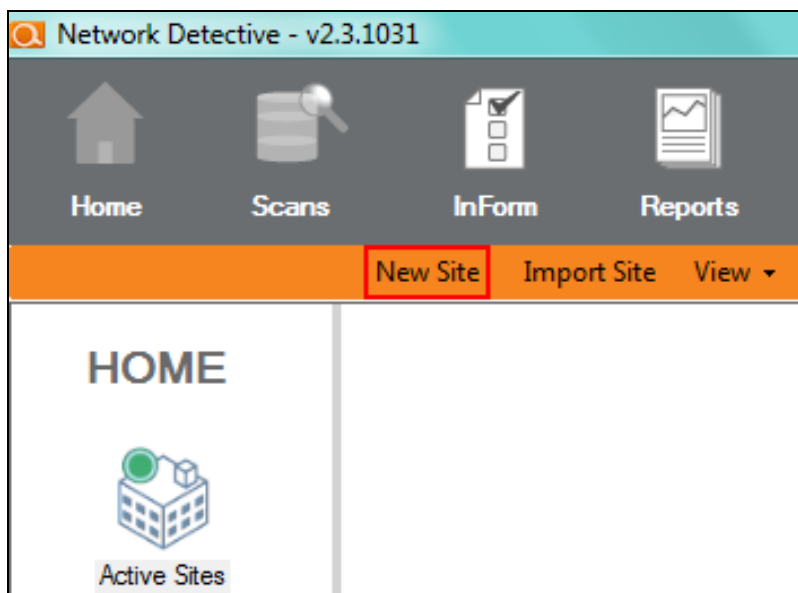
- ## 2. Complete the BDR Needs Worksheet and the Backup Selection Preference Worksheet
- which take less than a minute each.

# Perform a Unitrends BDR Needs Assessment

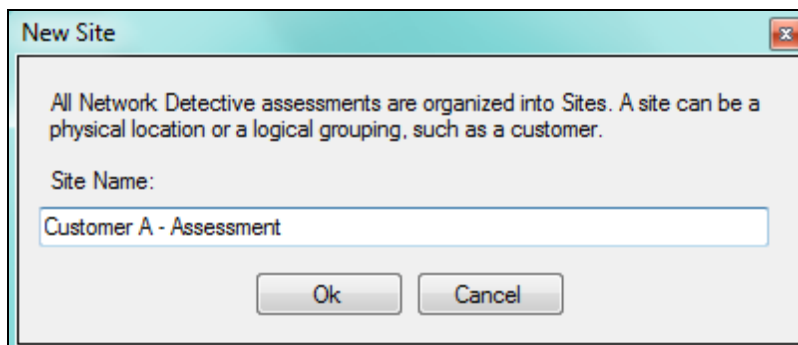
Follow the steps below to begin your BDR Needs Assessment:

## Create a Site

1. Go to <https://www.rapidfiretools.com/nd> 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.



3. Set the **Site Name** for the “Site” in Network Detective. Click **OK** to create the site.

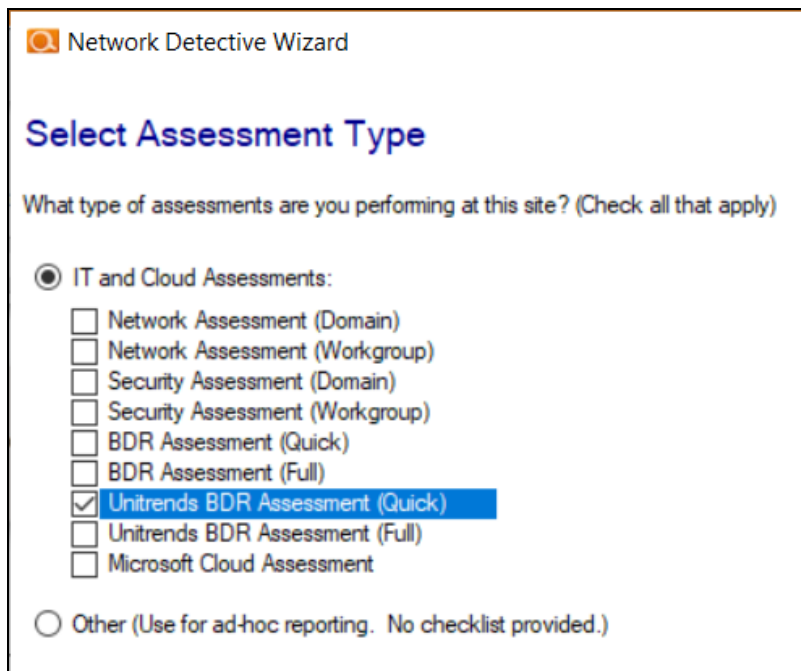


## Start an Active Unitrends BDR Quick Assessment Project

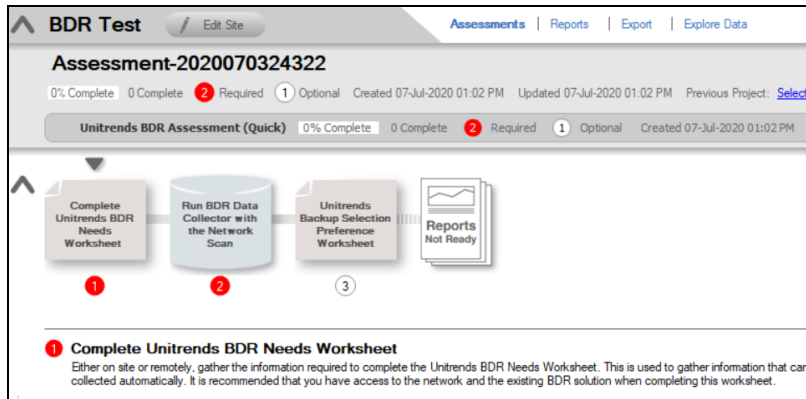
1. From within the **Site Window**, click the **Start** button to start the **Assessment**.



2. Next, select the **Unitrends 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, **Complete** the **Checklist Items** in the order presented.

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

**Important:** 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.

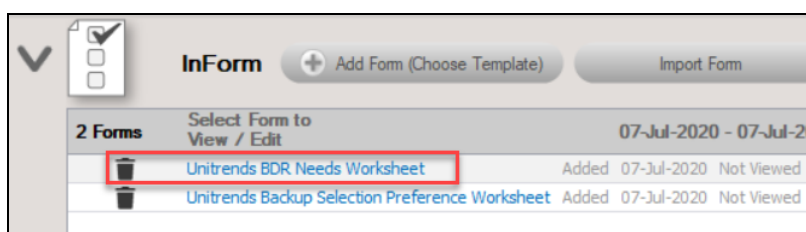
Continue to start your **Unitrends BDR Needs Assessment**.

## Perform the Unitrends BDR Quick Assessment

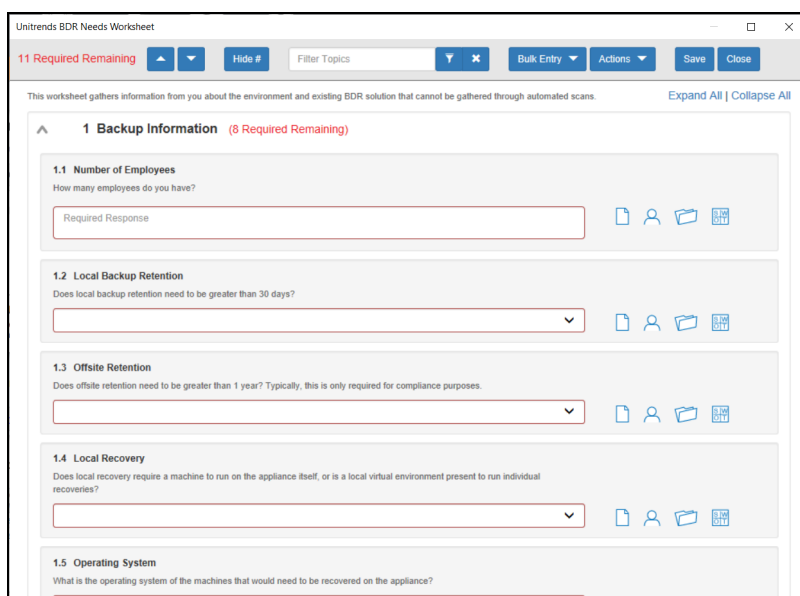
Follow the steps in the order below to perform the Unitrends BDR Quick Assessment.

### Step 1 — Complete the Unitrends BDR Needs Worksheet

1. To complete the **Unitrends 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 **Unitrends BDR Needs Worksheet** for selection.



2. **Open** the **Unitrends BDR Needs Worksheet** listed under the **InForm Bar** by clicking on the **Unitrends BDR Needs Worksheet's** name label. The **Unitrends 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.

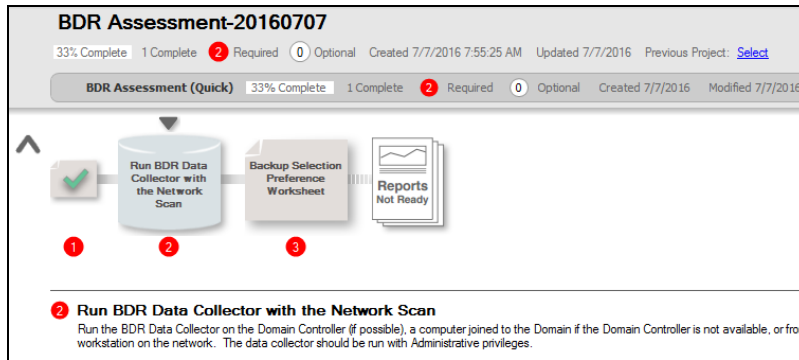
A screenshot of the 'Unitrends BDR Needs Worksheet' form. The title bar says 'Unitrends BDR Needs Worksheet'. Below the title bar, there's a status bar with '11 Required Remaining', a 'Hide #' button, a 'Filter Topics' input, and buttons for 'Bulk Entry', 'Actions', 'Save', and 'Close'. The main content area has a sub-header '1 Backup Information (8 Required Remaining)'. Below this are five sections: '1.1 Number of Employees' (text input), '1.2 Local Backup Retention' (dropdown), '1.3 Offsite Retention' (dropdown), '1.4 Local Recovery' (dropdown), and '1.5 Operating System' (text input). Each section has a description and a 'Required Response' label.

**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)
  - F. 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.
4. After the **Unitrends BDR Needs Worksheet** has been completed, the **Checklist** will be updated to show that the **BDR Needs Worksheet** has been **Completed**.

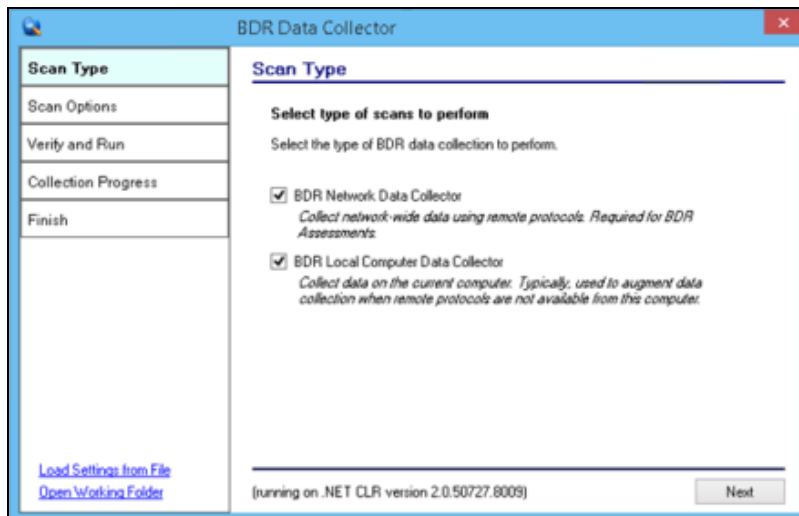




Proceed to the next step below to start the BDR **Scan Data Collection** Process.

## Step 2 — Run BDR Data Collector, then Import Scan

1. On your customer's network, download and run the **BDR Data Collector** on any Window's system from [www.rapidfiretools.com/bdr](http://www.rapidfiretools.com/bdr). Alternatively, you can bring the Data Collector to your customer's site and run from a USB drive.

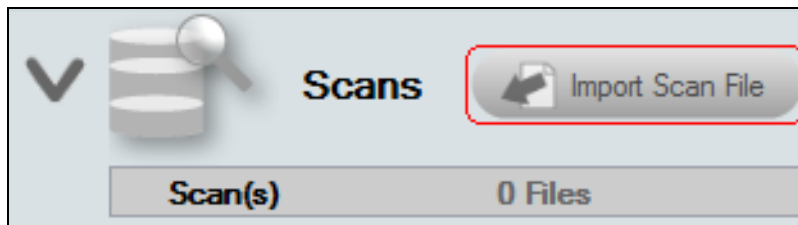


2. Follow the steps outlined in "[Running the BDR Data Collector](#)" on page 20 to perform the **BDR Network Data Collection**.

**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**.



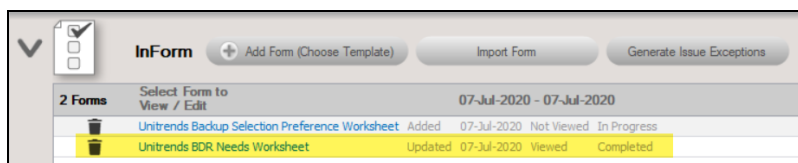
After the BDR Collector Data Scan is finished, select **Import File** within the Network Detective BDR Assessment Window to select the scan data file and Import the file into the Assessment.

### Step 3 — Complete Unitrends Backup Selection Preference Worksheet(OPTIONAL)

When you generate the Unitrends BDR Needs Analysis Report at the end of the assessment, you will be presented with a **recommend Unitrends Recovery Series product** for your BDR requirements. This OPTIONAL worksheet allows you to override the suggested Unitrends Model.

**Note:** You can skip this step and begin generating reports.

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



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

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

**Note:** You can view more details about the available Unitrends Recovery Series appliances here: <https://www.unitrends.com/backup-appliance-models>

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

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

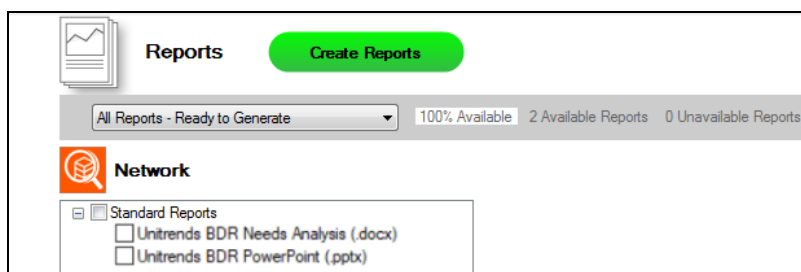
## Generating Reports

**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 <https://www.rapidfiretools.com/nd> 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 **Unitrends BDR 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:

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

# Appendices

Refer to the appendices listed below for the supplementary information referenced in this user guide:

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- Unitrends “Quick” BDR Needs Assessment versus “Full” Assessment .....19
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## Pre-Scan Network Configuration Checklist

RapidFire Tools products can gather a great deal of information from the target network with little advance preparation - and with very little footprint! However, if you are having trouble with scans, or you have the ability to configure the target network in advance, we recommend the settings below.

These checklists detail the recommended network configurations for both Windows **Domain** and **Workgroup** environments.

**Note:** You must have .NET 3.5 installed on machines in order to use all data collector and appliance tools.

### Checklist for Domain Environments

Share this checklist with your IT Administrator and ask them to configure your network's Domain Controller as follows:

Complete	Domain Configuration
<b>GPO Configuration for Windows Firewall (Inbound Rules)</b>	
<input type="checkbox"/>	<p>Allow <i>Windows Management Instrumentation (WMI)</i> service to operate through Windows Firewall</p> <p>This includes the following rules:</p> <ul style="list-style-type: none"> <li>• Windows Management Instrumentation (ASync-In)</li> <li>• Windows Management Instrumentation (WMI-In)</li> <li>• Windows Management Instrumentation (DCOM-In)</li> </ul>
<input type="checkbox"/>	<p>Allow <i>File and printer sharing</i> to operate through Windows Firewall</p> <p>This includes the following rules:</p> <ul style="list-style-type: none"> <li>• File and Printer Sharing (NB-Name-In)</li> <li>• File and Printer Sharing (SMB-In)</li> <li>• File and Printer Sharing (NB-Session-In)</li> </ul>
<input type="checkbox"/>	<p>Enable <i>Remote Registry</i> "read only" access on computers targeted for scanning.</p>

Complete	Domain Configuration
	<div data-bbox="381 296 1323 405" style="border: 1px solid #0070C0; padding: 5px;"> <b>Note:</b> Remote Registry access should be restricted for use by the user access account credentials to be used during network and local computer scan. </div>
<input type="checkbox"/>	<p>Enable the <i>Internet Control Message Protocol (ICMP)</i> to allow authorized ICMP echo request messages and ICMP echo reply messages to be sent and received by Windows computers and network devices.</p> <p>Windows firewall rules on Windows computers may need to be created/enabled to allow a computer:</p> <ul style="list-style-type: none"> <li>operating a Kaseya-RapidFire Tools product network data collector to issue ICMP echo request messages to be sent to Windows computers and network devices</li> <li>to send ICMP echo reply messages in response to an ICMP echo request</li> </ul> <div data-bbox="381 827 1349 936" style="border: 1px solid #0070C0; padding: 5px;"> <b>Note:</b> ICMP requests are used to detect active Windows computers and network devices to scan. </div>
<b>GPO Configuration for Windows Services</b>	
<input type="checkbox"/>	<p><i>Windows Management Instrumentation (WMI)</i></p> <ul style="list-style-type: none"> <li>Startup Type: Automatic</li> </ul>
<input type="checkbox"/>	<p><i>Windows Update Service</i></p> <ul style="list-style-type: none"> <li>Startup Type: Automatic</li> </ul>
<input type="checkbox"/>	<p><i>Remote Registry</i></p> <ul style="list-style-type: none"> <li>Startup Type: Automatic</li> </ul>
<input type="checkbox"/>	<p><i>Remote Procedure Call</i></p> <ul style="list-style-type: none"> <li>Startup Type: Automatic</li> </ul>
<b>Network Shares</b>	
<input type="checkbox"/>	<ul style="list-style-type: none"> <li><i>Admin\$</i> must be present and accessible using supplied credentials (usually a local admin or user in the local Computer's Administrative Security group)</li> </ul>



Complete	Domain Configuration
<b>3rd Party Firewalls</b>	
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Ensure that 3rd party Firewalls are configured similarly to Windows Firewall rules described within this checklist.</li> </ul> <div> <b>Note:</b> This is a requirement for both Activity Directory and Workgroup Networks. </div>

## Checklist for Workgroup Environments

Share this checklist with your IT Administrator and ask them to configure each computer in your workgroup as follows:

Complete?	Workgroup Configuration
	<b>Network Settings</b>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• <i>Admin\$</i> must be present on the computers you wish to scan, and be accessible with the login credentials you provide for the scan</li> </ul>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• <i>File and printer sharing</i> must be enabled on the computers you wish to scan</li> </ul>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• <i>Ensure the Windows Services below are running and allowed to communicate through Windows Firewall:</i> <ul style="list-style-type: none"> <li>• Windows Management Instrumentation (WMI)</li> <li>• Windows Update Service</li> <li>• Remote Registry</li> <li>• Remote Desktop</li> <li>• Remote Procedure Call</li> </ul> </li> </ul>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>• Workgroup computer administrator user account credentials.</li> </ul> <div> <b>Note:</b> Before configuring scan settings for workgroups, prepare a list of the workgroup computer(s) administrator user account credentials for entry into the scan settings wizard. </div>

Complete?	Workgroup Configuration
<input data-bbox="261 296 302 331" type="checkbox"/>	<p data-bbox="394 306 1398 401">Enable the <i>Internet Control Message Protocol (ICMP)</i> to allow authorized ICMP echo request messages and ICMP echo reply messages to be sent and received by Windows computers and network devices.</p> <p data-bbox="394 447 1409 506">Windows firewall rules on Windows computers may need to be created/enabled to allow a computer:</p> <ul data-bbox="444 537 1398 646" style="list-style-type: none"><li>• operating a Kaseya-RapidFire Tools product network data collector to issue ICMP echo request messages to be sent to Windows computers and network devices</li><li>• to send ICMP echo reply messages in response to an ICMP echo request</li></ul> <div data-bbox="394 667 1365 779"><p data-bbox="418 688 1341 751"><b>Note:</b> ICMP requests are used to detect active Windows computers and network devices to scan.</p></div>

## Unitrends “Quick” BDR Needs Assessment versus “Full” Assessment

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

Feature	Quick	Full
Scan Types	Network Only	Network and Local Computer
Unitrends Backup Product Custom Recommendation	✓	✓
Cloud Storage Opportunity Detection		✓
Cloud Application Usage Detection		✓
Non-published Local Attached Storage Detection		✓
Existing Backup Solution Evaluation		✓
RTO Calculator		✓
Critical System Identification	Use default setting of servers as critical and workstations as not	Allows you to hand pick which systems are critical
Exclude Individual Volumes from Assessment		✓
Requires Completion of InForm Worksheets		✓

## Running the BDR Data Collector

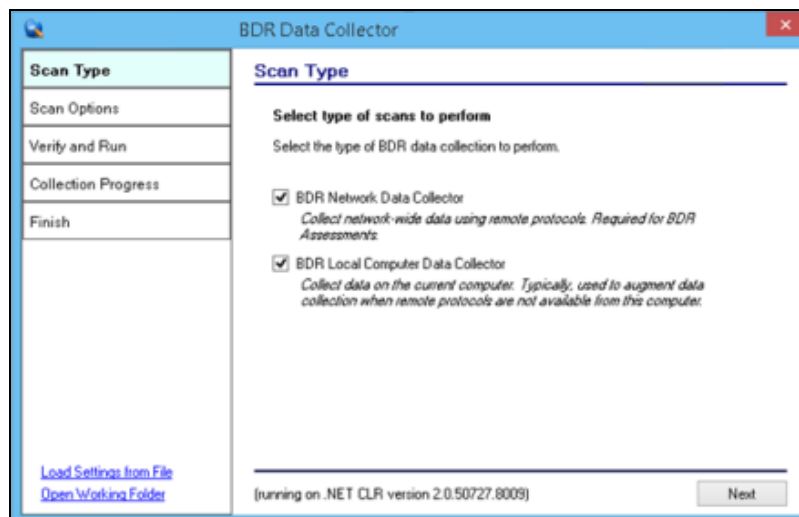
**Prerequisite:** The **BDR Data Collector** scan depends on the availability of WMI within the network environment being scanned. Please verify that WMI is enabled before proceeding with the steps below.

### 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 (<https://www.rapidfiretools.com/nd>) 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.

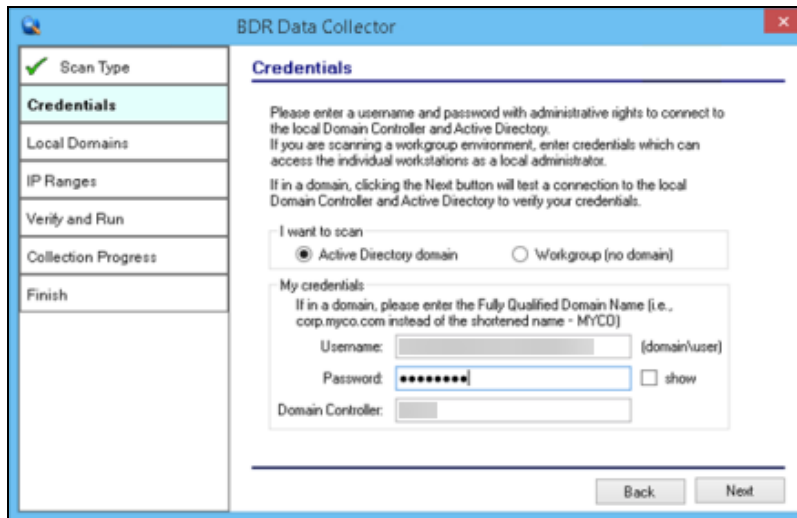
To start the **BDR Data Collector**, right-click on the **BDRDataCollector.exe** and run **BDRDataCollector.exe** using the **RUN AS ADMINISTRATOR MENU** option. Use the **unzip** option to unzip the files into a temporary location and start the collector.



### 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.



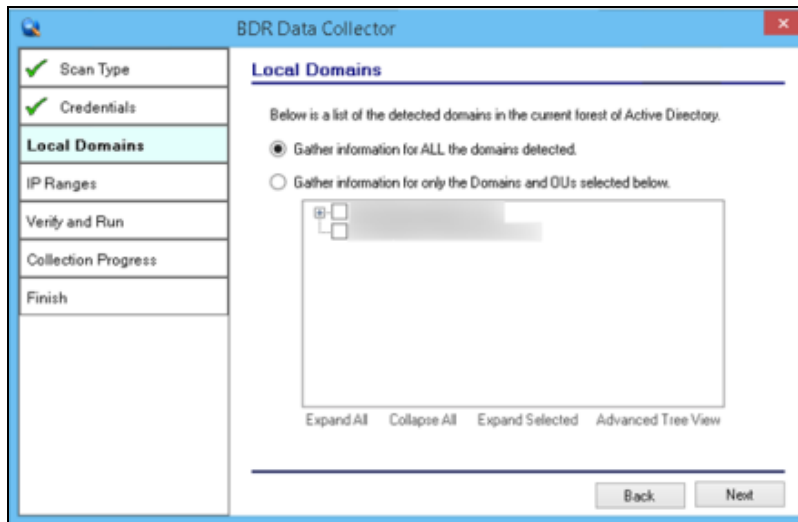
### Step 3 — Configure the BDR Data Collector Network Scan

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.

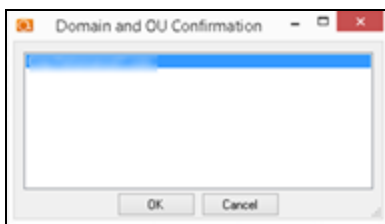
At this point in the process, the **Local Domains** window will be presented.



## 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:

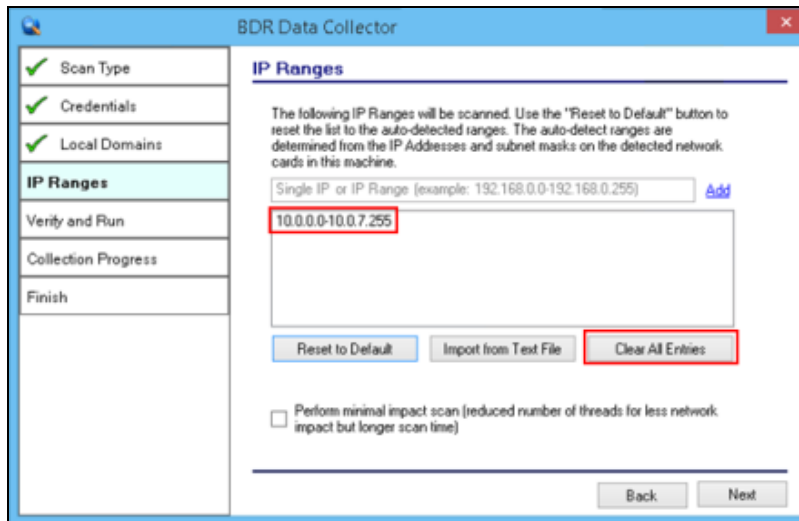
1. Select Gather information for only the Domains and OUs you select, and make your selections.



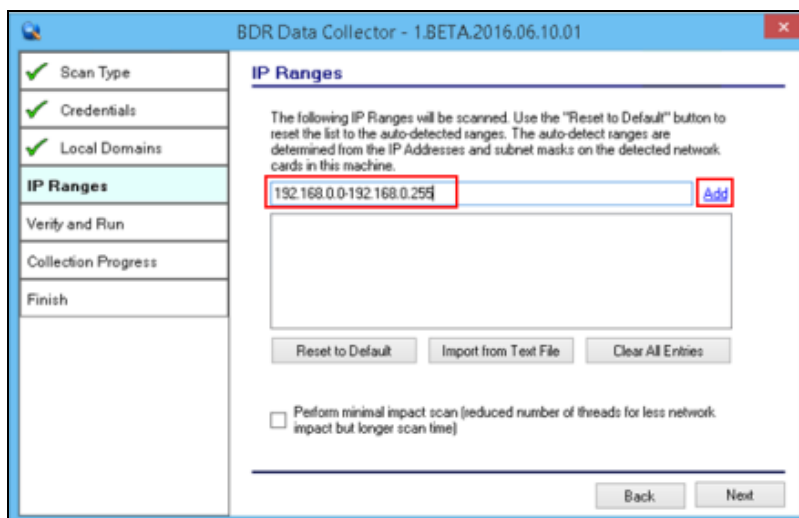
2. Select the **Next** button.
3. Confirm the Domain and OU when the **Domain and OU Confirmation** window is presented.
4. Select the **OK** button to confirm the Domain and OUs you have selected

## 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.

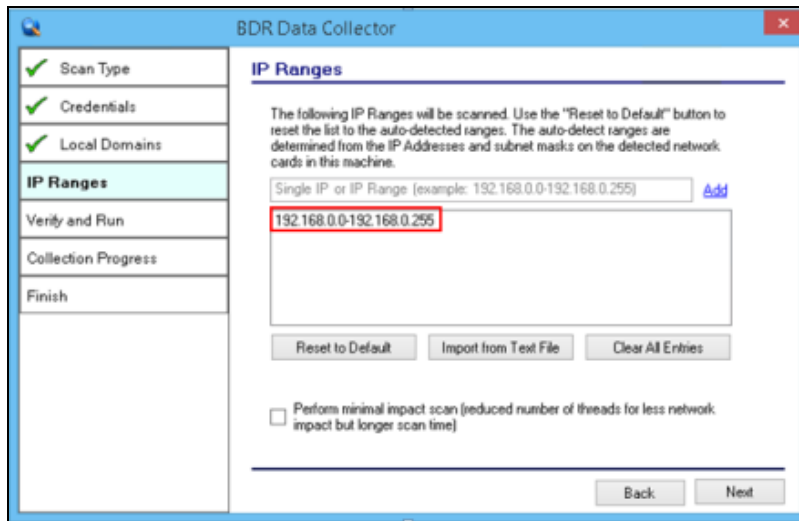


Next, enter the **Starting and Ending IP Addresses** for the range(s) you want to scan in the IP range field using the following format:

**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.

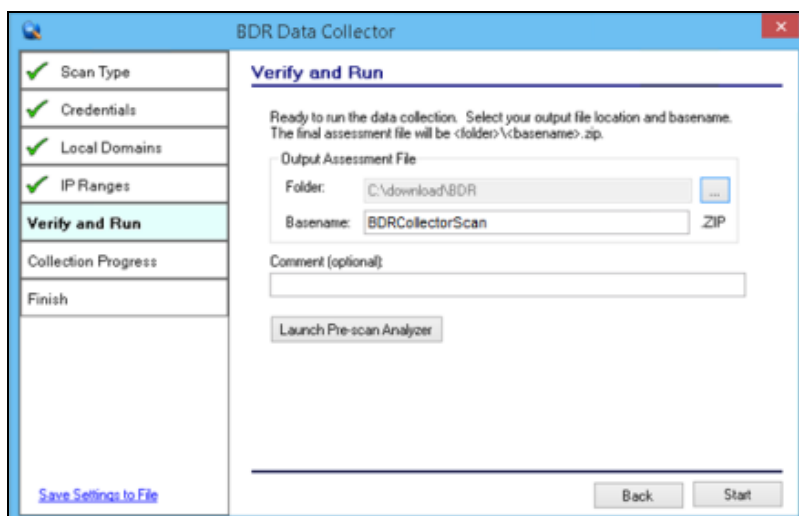


**Note:** Scans may affect network performance. Select **Perform minimal impact scan** if this is an issue. Then select the **Next** button.

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 **Base name** for the scan data.

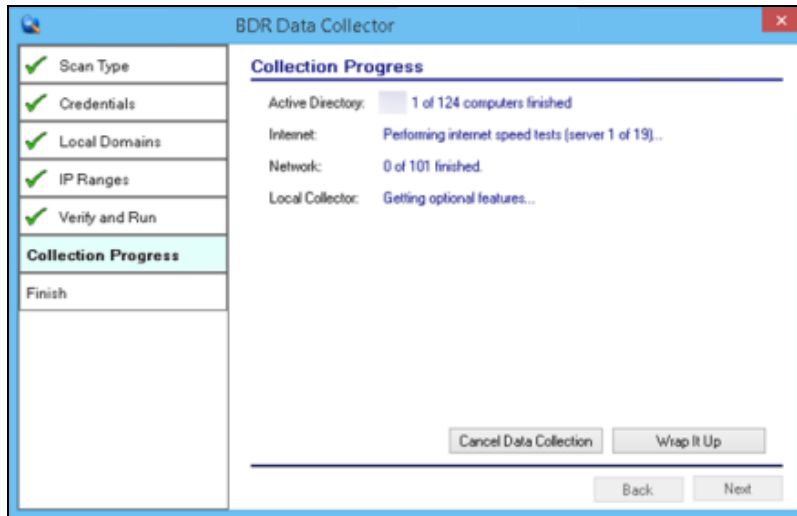


Enter any **Comments** and then select **Start**. The **Collection Progress** window will then be displayed as presented below.



**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

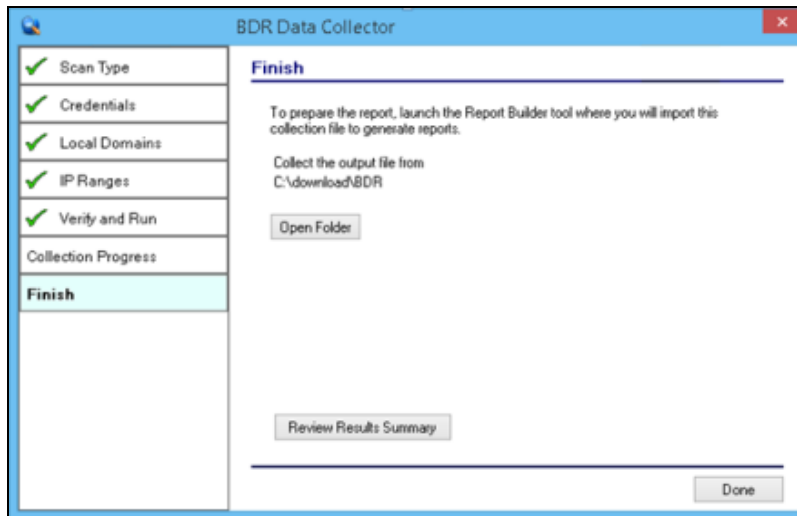


The **Network Scan**’s status is detailed in the **Collection Progress** window.

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**.

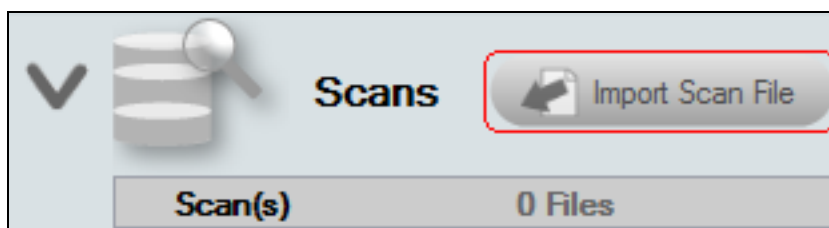
Click on **Done button** to close the **BDR Data Collector** window. Note the location where the scan's output file is stored and gather the output zip file(s) for importing into the Network Detective application.

## 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.

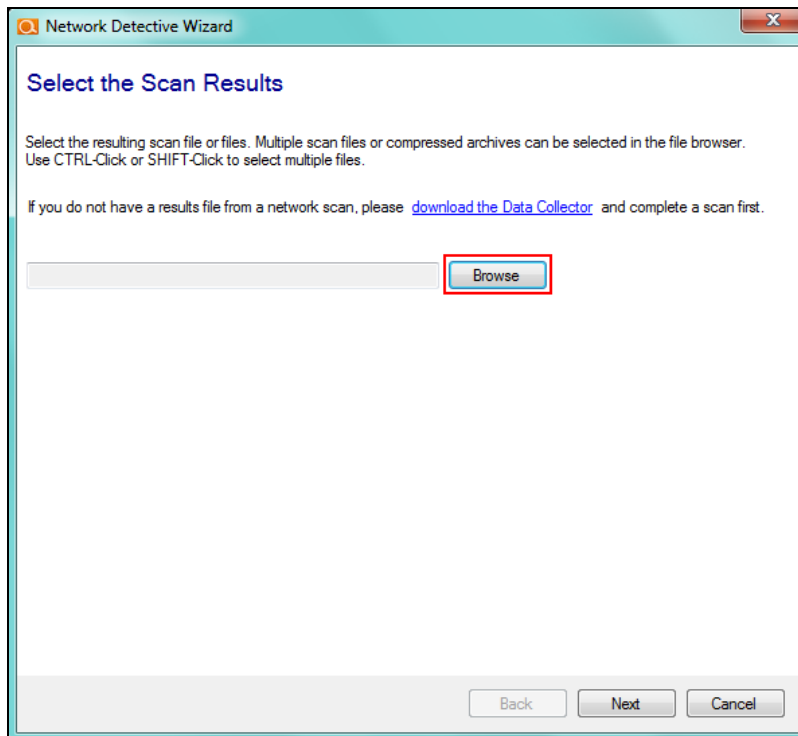
**Perform the following steps to Import the Scan Data:**

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



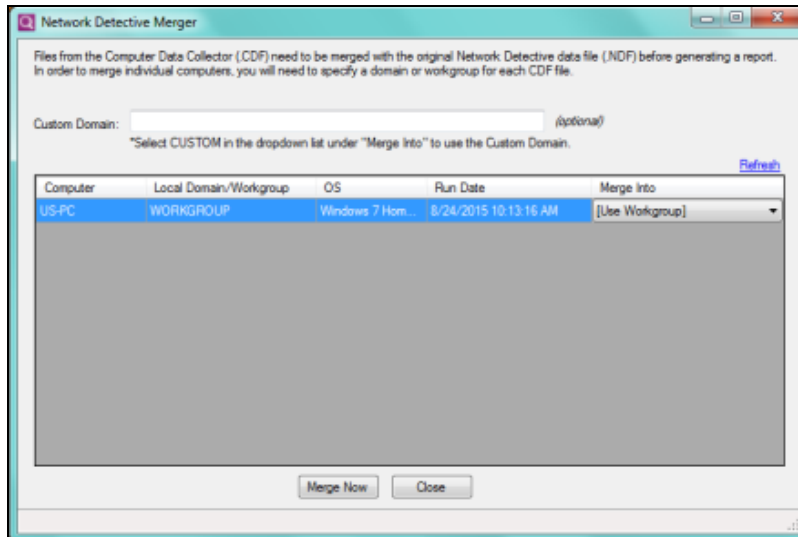
The **Select the Scan Results** window will be displayed thereby allowing you to import the .ZIP file produced by the **BDR Network Data Scan** into the **Assessment**.

2. **Browse** and **Select** the **BDR Network Scan** data file from the data collection you completed at your client's site.



Then click the **Next** button to import the scan data.

3. The **Network Detective Merge** window will be displayed.

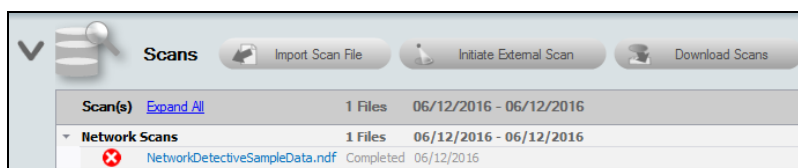


The success of the scan's import will be confirmed by the **Scan Archive Created** window being displayed.



4. 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.

BDR Test

[Assessments](#)
[Reports](#)
[Export](#)
[Explore Data](#)

Assessment-2020070324322

67% Complete
2 Complete
0 Required
1 Optional
Created 07-Jul-2020 01:02 PM
Updated 07-Jul-2020 02:16 PM
Previous Project: [Select](#)

Unitrends BDR Assessment (Quick)

67% Complete
2 Complete
0 Required
1 Optional
Created 07-Jul-2020 01:02 PM

1

2

3

Unitrends Backup Selection Preference Worksheet

Reports Ready

3

Unitrends Backup Selection Preference Worksheet

This worksheet allows you to override the suggested Unitrends Model.