Acronis Install Review Checklist

**Note:** This checklist is for installing the AMS at your customer’s site and configuring it, deploying agents, and configuring backup plans. [Click this link to view the *Acronis Solution Guide and Best Practices* PDF](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf). Click other links for additional help.

**Management Server Installation**

* [Install the AMS and Acronis Console onto a machine at your customer’s site](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#Installing).
	+ On the installer, check the following boxes: **Centrally monitor and configure the backing up of physical and virtual machines, Store the backups of other machines on this machine,** and **Connect to remote machines**.
* [Connect to the AMS and configure the local vault to store the Acronis backups.](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#Configuring)
	+ For local backups, we recommend not using deduplication locally unless you have extremely fast disks and a minimum of 32GB of RAM available to dedicate to Acronis.
	+ If you do choose to setup deduplication locally, please ensure that the dedup indexing database is on a separate volume.

**License Provisioning and Installation**

* [Provision Acronis licenses from the eFolder Web Portal for the machines you plan to protect.](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#Provisioning)
	+ Ensure that you provision add-on keys for Exchange, AD, SQL, and SharePoint as needed.
* [Add provisioned licenses keys to the License Server on the AMS at your customer’s site](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#LicenseKeys).

**Agent Installation and Configuration**

* [Deploy Acronis agents onto the machines that are going to be protected and register them with the AMS at the customer site.](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#InstallingAgent)
	+ On the installer, check the following box: **Backup this machine’s data.**
* Configure notifications in the AMS both locally at your customer’s site and on the remote AMS in the eFolder Cloud.
	+ Under *Options*, *Default backup options*, select **E-mail notifications.**
	+ Specify the things for which you want to be notified and enter in your SMTP information.
* [Create a local backup plan and add protected agents to the backup plan.](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#LocalBackupPlan)
	+ **Note:** Backup Plans should be setup by connecting to the local AMS—not the agent itself.
	+ **Recommended:** Create a custom backup plan with incrementals throughout the day, a differential once a week, and a new full backup once a month.
	+ Ensure that you enable chain cleanup by deleting images older than a set period of time.
	+ **IMPORTANT:** You must create a separate Exchange Information Store backup to execute granular recoveries from Exchange.
* [Create a remote backup plan or seed drive backup plan if you need to seed the data to eFolder using a drive; after the seed drive has reached the datacenter, convert the seed backup plan to a remote backup plan.](https://backup.securewebportal.net/efolder/files/BDR%20for%20Acronis/Acronis%20Solution%20Guide%20and%20Best%20Practices.pdf#RemoteBackupPlan)
	+ **Recommended:** Create a custom backup plan with incrementals once a day, differentials once a week, and a new full backup once a month (because of deduplication, the full backup will not be transferred in full).
	+ **IMPORTANT:** Please pick a random arbitrary date for your full images to ensure that all your customers do *not* send full backups to the data center at the same time.
	+ **IMPORTANT:** Do *not* set retention to less than 60 days.
	+ **Note:** We do *not* support granular Exchange recoveries in our cloud. Do *not* setup *Information Store* backups to the cloud. In the event of a disaster, Exchange will work in a virtual export with the standard image-based backups.

**Create Bootable Media:**

* Select the **Bootable Media Builder** under the *Tools* menu.
* Select a media type of Windows PE; you will likely have to download the Windows AIK (~3GB).
* Select **ISO** as the media type.