[Client Company]

Technical Disaster Recovery Plan

Prepared by [MSP NAME] on [DATE]

**Before you begin:**

* Assign DR roles – technician’s jobs/responsibilities

| Name | Role | Contact Info | DR Process ROLE | Priority |
| --- | --- | --- | --- | --- |
| *Ex) Bob Smith* | *BDR System Admin* | *Phone: 123.456.7890**Email:* bsmith@email.com | *Data recovery* | *1* |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

* Consider additional variables you may want to add to this plan, particularly for failback:
	+ Are you using Direct-to-Cloud or appliance-based backup?
	+ Are you using Local Cache for recovery acceleration for Direct-to-Cloud?
	+ For failback, are you replicating your backup from an appliance to an Axcient vault or a private vault, or via Geo+?

**Failover**

***Assumption: The whole site is down, natural disaster, appliance out of commission***

**Step 1 – Triage your workstations and servers to prioritize for recovery**

* Identify and document your primary/mission central systems
* Identify and document your second-tier systems are
* Identify and document secondary and tertiary systems that don’t need immediate recovery

| System | Offsite Backup | Backup Retention | Backup Frequency |
| --- | --- | --- | --- |
| *e.g., System 1* | *√* | *3 year* | *Hourly* |
|  |  |  |  |
|  |  |  |  |

**Step 2 – Determine hardware/performance requirements**

* How much RAM?
* CPU cores?
* Other:

**Step 3 – Identify Networking information**

* Gateway IP
* System IP addresses
* System subnets
* Other:

**Step 4** – **Determine the best option for network connectivity with DR site and local site**

* SSL VPN
* Site-to-site VPN (IPSEC or OpenVPN)
* Remote desktop (RDP)

**Step 5 – Virtualize desired systems in Axcient Cloud/Virtual Office**

Each x360Recover protected system receives 30 days of free virtualization in x360Recover Virtual Office during a calendar year. All virtual machines (VMs) in a Virtual Office test will be automatically shut off after the duration you configure in the auto-shutoff settings. You can monitor, stop, or extend this automatic VM shutoff date on the Virtual Office (Test) details page. [Visit the KB](https://help.axcient.com/recover-with-virtual-office/x360recover-manager-manage-virtual-offices) to learn more about managing Virtual Office.

* Virtualize with runbooks, or
* Allocate appropriate VM resources
	+ Virtualize manually
		- Step A – once machine(s) are turned on, configure Virtual Office settings including:
			* Gateway
			* Subnet mask
			* VPN preference - SSL VPN or Site-to-site VPN (IPSEC or OpenVPN)
			* Port forwarding
			* DHCP if not virtualizing active directory server
		- Step B – Assigning static IP to each virtual machine, if needed
			* Log in to each VM console and configure static IP as you would normally in Windows

**Step 6 – Credentials and access distribution**

* Relay user login credentials (determined by the network connection option in Step 4)
* If using SSL VPN, must remote into each end user’s machine to install VPN client

**Failback**

These are the next steps once the failback site is rebuilt and the hardware is back in commission and running normally. Axcient’s Knowledgebase includes a comprehensive guide to bare metal recovery (BMR): <https://help.axcient.com/bare-metal-restore-bmr/bare-metal-restore-bmr-guide>

Below are the steps for

* Appliance-based failback
* Direct-to-Cloud failback *with* Local Cache
* Direct-to-Cloud failback *without* Local Cache
* Bare metal restore from a virtual disk

**Appliance Based Failback**

**Step A –** Do an incremental vault restore down to the new appliance <https://help.axcient.com/x30recover-faqs-appliance-errors-and-troubleshooting/2091183-incremental-vault-recovery-x360recover>

**Step B**– Conduct BMR operations <https://help.axcient.com/bare-metal-restore-bmr/1402989-appliance-bmr-restore>

**Direct-to-Cloud Failback (without Local Cache)**

Conduct BMR operations <https://help.axcient.com/bare-metal-restore-bmr/vault-with-no-local-cache-bmr-bare-metal-restore>

**Direct-to-Cloud Failback (WITH Local Cache)**

Conduct BMR operations <https://help.axcient.com/bare-metal-restore-bmr/bare-metal-restore-from-local-cache>

**BMR from a Virtual Disk**

Conduct BMR operations <https://help.axcient.com/bare-metal-restore-bmr/virtual-disk-export-bmr-bare-metal-restore>

**Next steps**

* Be sure to shut off Virtual Offices, and revisit or configure VM auto-shutoff as necessary.
* Now that you have your DR plan, create a client-specific runbook for fast virtualization with Virtual Office.
* Document the plan to failback and bring the client back to normal operations.
* Document and present the plan and SLA to the client.