



# PHD Virtual Backup

PHD Virtual Backup Exporter

version 6.5

Users Guide

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[www.phdvirtual.com](http://www.phdvirtual.com)





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PHD Virtual Backup Exporter Users Guide

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## About This Guide

This guide is designed to introduce you to the PHD Virtual Backup Exporter and to:

- Explain how to install and configure the PHD Exporter.
- Illustrate the steps necessary to export backups to a staging location.

**Note:** The information in this guide is also included in the PHD Virtual Backup Users Guide.

**Table 1 - Terms and acronyms used in this guide**

Term or acronym	Definition
<b>PHD Virtual Backup Plug-in</b>	The integrated component of PHD Virtual Backup found within and installed via the PHD Virtual Backup installation file.
<b>PHD Virtual Backup Console</b>	The graphical interface used to configure PHD VBA settings and to configure and run backups and restores. Installed via the PHD Virtual Backup installation file along with the plug-in.
<b>VBA™</b>	Virtual Backup Appliance. A small virtual machine used to backup and restore other VMs. The PHD Virtual Backup Appliance is a VBA.
<b>PHD Virtual Backup Appliance</b>	The VBA that is deployed and used to perform backups and restores of virtual machines.
<b>Backup Data Store</b>	The location where backups are stored for each PHD VBA. This can be an attached virtual disk or network location.
<b>PHD Guest Tools</b>	The stand-alone component is installed on individual virtual machines that require application aware processing.
<b>PHDVB</b>	PHD Virtual Backup
<b>PHD VBA</b>	The PHD Virtual Backup Appliance (also, sometimes referred to as 'the appliance').
<b>PHD Console</b>	The PHD Virtual Backup Console.
<b>PHD Exporter</b>	The PHD Virtual Backup Exporter.
<b>PHD Exporter Console</b>	The PHD Virtual Backup Exporter Console.
<b>BDC</b>	Backup Data Connector.
<b>VM</b>	Virtual Machine.
<b>OVF</b>	Open Virtualization Format (.ovf). A standard format for packaging and distributing virtual appliances.
<b>XVA</b>	Xen Virtual Appliance (.xva). The standard format for packaging and distributing virtual appliances on XenServer.
<b>DR</b>	Disaster Recovery.

# Chapter 1 - Installing the PHD Virtual Backup Exporter

The PHD Virtual Backup Exporter lets you export backup files from any existing backup storage location for long term or offsite storage. The PHD Exporter must be installed to a Windows Server machine using the included installation file. You only need to install the PHD Exporter if you plan to export backups to another location - the PHD Exporter is not required to run Backups, Restores, or Replication.

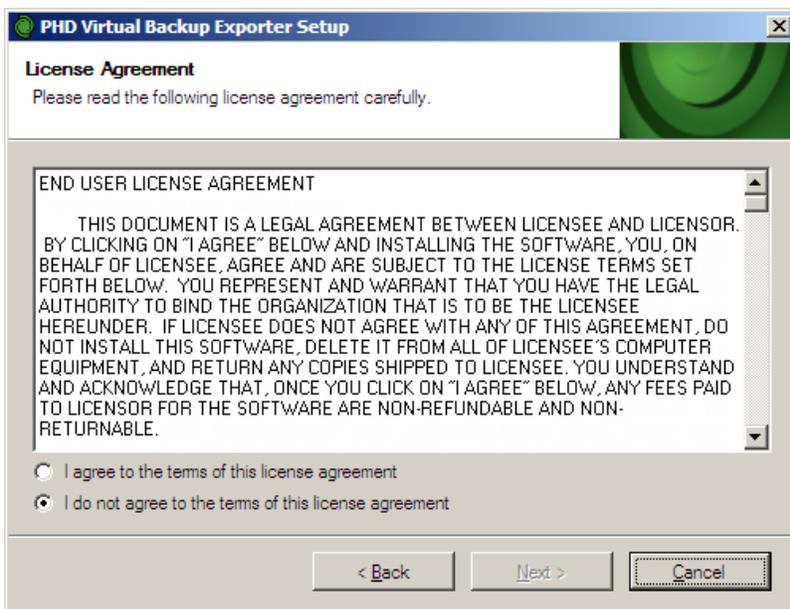
## What you will need

- The PHD Virtual Backup Exporter installation file extracted from the PHD Virtual Backup installation package.
- A computer with either Windows Server 2003 (32 bit) or Windows Server 2008 R2 installed. (.NET Framework 2.0 or later is also required). For performance reasons, it is recommended that the PHD Exporter be installed to a physical machine (not a virtual machine).
- Adequate space available on the Windows Server for storing exported backup files.

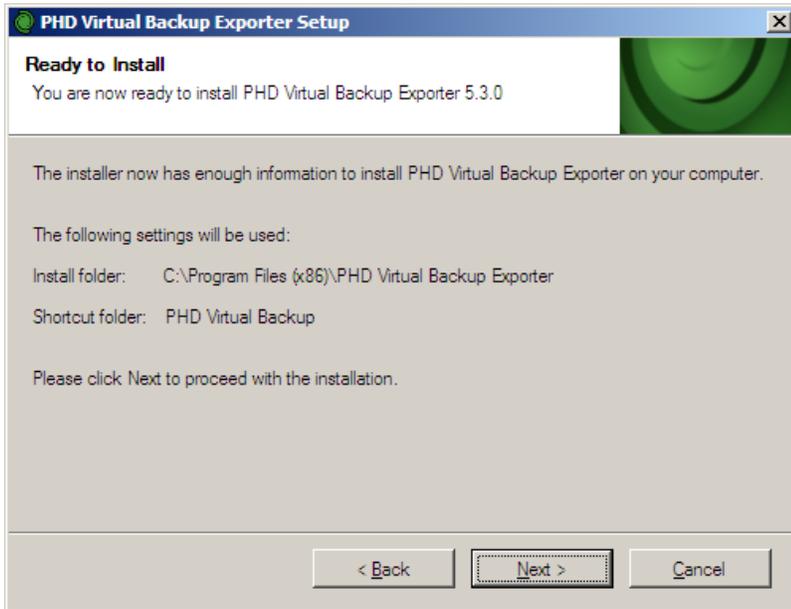
**Note:** Antivirus programs may prevent the PHD Exporter from exporting files to your staging location. If you are running antivirus software on your staging computer, make sure an exclusion is added to your antivirus software to allow the PHD Exporter to save any exported files.

## To install the PHD Exporter

1. From the PHD Virtual Backup installation package, double-click the PHD Exporter installation file. When the installation wizard opens, click **Next**.



2. Agree to the license agreement then click **Next** to continue.
3. Select a location to install the application, then click **Next**.



4. Review the summary, then click **Next** to begin the installation.
5. When the wizard completes, click **Finish**.

The PHD Virtual Backup Exporter is installed. You can run the PHD Exporter by double-clicking the desktop icon or by selecting **PHD Virtual Backup > PHD Virtual Backup Exporter** from the Windows Start menu.

## Chapter 2 - PHD Virtual Backup Exporter

The PHD Virtual Backup Exporter is a Windows application that allows you to export existing backups for long term or offsite storage. When the PHD Exporter is configured, the compressed and deduplicated backup files stored on your PHD VBA's backup storage locations are exported to an external staging location in standard OVF format.

**Note:** Full/Incremental backups are not currently supported by the PHD Exporter.

Using a separate application to export the backup files offloads some of the overhead from the PHD VBA and helps to increase the typical transfer rate to tape or for other archive or storage purposes.



Different than the Backup Data Connector, which exposes backups through the PHD VBA as a CIFS share, the PHD Exporter exports the backup data directly from the backup storage location to a Windows server.

The PHD Exporter can take advantage of the Windows Task Scheduler that comes installed with each supported version of Windows to run each export job. When creating your job, you can select to add a task to the Windows Task Scheduler. From there you can then create and edit a schedule for the export job. If you will not be using the Windows Task Scheduler, you can use a batch script or another scheduling program to run your export jobs.

The PHD Exporter is described in detail in the next few sections:

<a href="#">How the PHD Virtual Backup Exporter works</a> .....	4
<a href="#">PHD Exporter Console</a> .....	10
<a href="#">PHD Exporter - Create Job Wizard</a> .....	21

## How the PHD Virtual Backup Exporter works

Each time an export job runs, backup files you selected are exported directly from the PHD VBA backup storage location and then written to a staging location on a Windows server. The next few sections provide an overview of how the PHD Exporter is installed, configured, and used to export your backup files.

**Note:** The PHD Exporter is supported on Windows Server 2003 (32 bit) and Windows Server 2008 R2 operating systems. .NET Framework 2.0 or later is also required.

### Installing the PHD Exporter

The PHD Exporter is a separate Windows application that can be installed to a Windows server machine (for performance reasons, it is recommended that you install the PHD Exporter to a physical machine rather than a virtual machine) with access to your backup data. After it is installed and configured, you can create jobs to export backup files from your existing backup storage locations. The PHD Exporter is installed via an executable included with the PHD Virtual Backup installation package.

When installation completes, in addition to the Program Files directory, another directory is created (C:\PHDVB) that is used to store the PHD Exporter configuration files. These files contain information about the staging location, data stores, email settings, and export jobs that you create. If you remove the PHD Exporter application, these files and directory are not automatically removed - they remain on your computer. If you re-install the PHD Exporter, these configuration options and jobs will still be available.

**Note:** If the PHD Exporter installation path changes (if it was removed then re-installed to a new location, for example) any export jobs that were created previously must be updated to point to the new location of the PHD Exporter executable. If you created a task in Windows Task Scheduler, edit the task properties to change the path. If you are using a batch script or other method, make sure to update the path in the command used to run the export job.

### Configuring the PHD Exporter

After the PHD Exporter is installed, at a minimum, you will need to define a staging location to store the exported backups, and then add at least one PHD VBA backup storage location from which you will export backups

**Note:** To allow backups to be exported from a PHD VBA's attached disk storage, sharing must be enabled. This can be done in the PHD Console's Configuration area **Connectors** tab. Select the PHD VBA from the dropdown menu, then on the Connectors tab, select **Enable share for VM Replication or Exporter**. After you save your changes, you will be able to export backups stored on the PHD VBA's attached disk storage.

Use the PHD Exporter Console's **Configuration** area to define the staging area and configure backup storage locations. See [PHD Exporter Console - Configuration on page 13](#) for details.

### Creating Export jobs

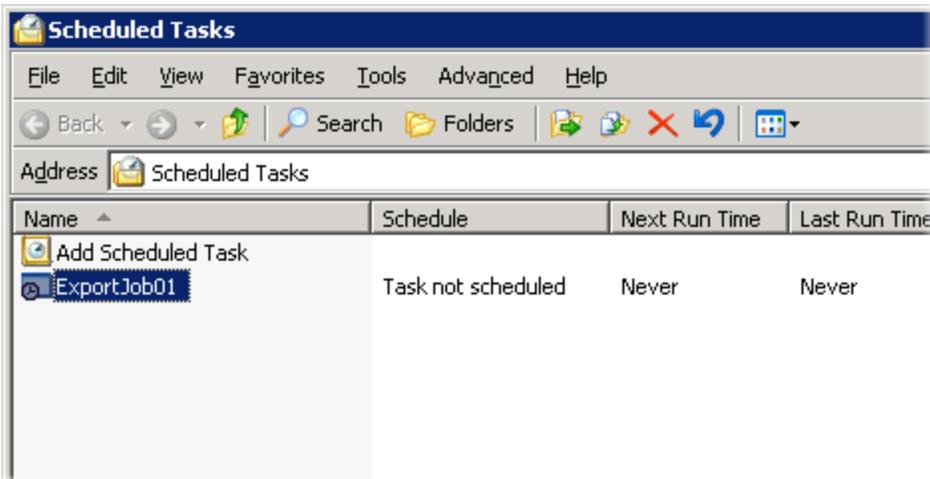
After installing and configuring the PHD Exporter, you can then create export jobs to export VM backups to your staging location as OVF's. For details on creating Export Jobs, see the section [PHD Exporter Console - Jobs on page 11](#).

**Note:** Backups created with PHD Virtual Backup versions prior to v5.3 are not supported for export by the PHD Exporter. If an export job contains backups from a previous version, a warning is reported in the logs and email report.

## Viewing and Editing Export Jobs in the Windows Task Scheduler

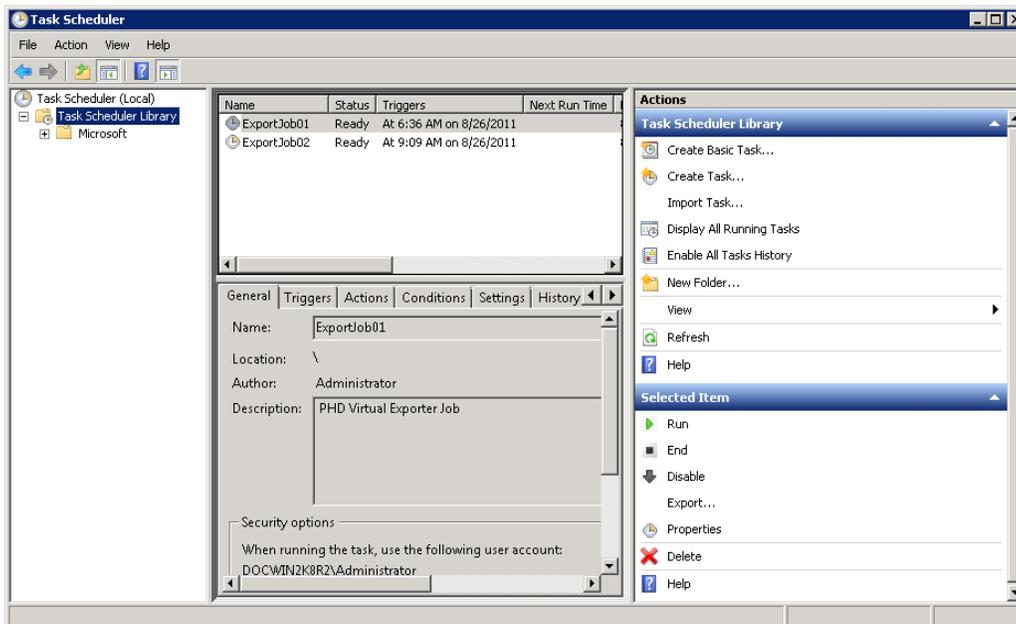
If you selected to add a task to the Windows Task Scheduler, you can view your job there after the wizard completes. You can open the Task Scheduler quickly from the Exporter Console **Jobs** area by clicking **Task Scheduler**. When open, you can view your created export jobs in the list of scheduled tasks. The following image shows the list of tasks as seen in the Windows Task Scheduler on a Windows 2003 machine. Right-click the task name to edit the schedule or to run the job.

**Figure 2 - 1. An export job added to the Task Scheduler on Windows 2003 Server**



On Windows 2008 Server, export jobs are added to the **Task Scheduler Library** as seen in the following image. Select any job here to edit the job schedule or to start the job.

**Figure 2 - 2. An export job added to the Task Scheduler on Windows 2008 Server**

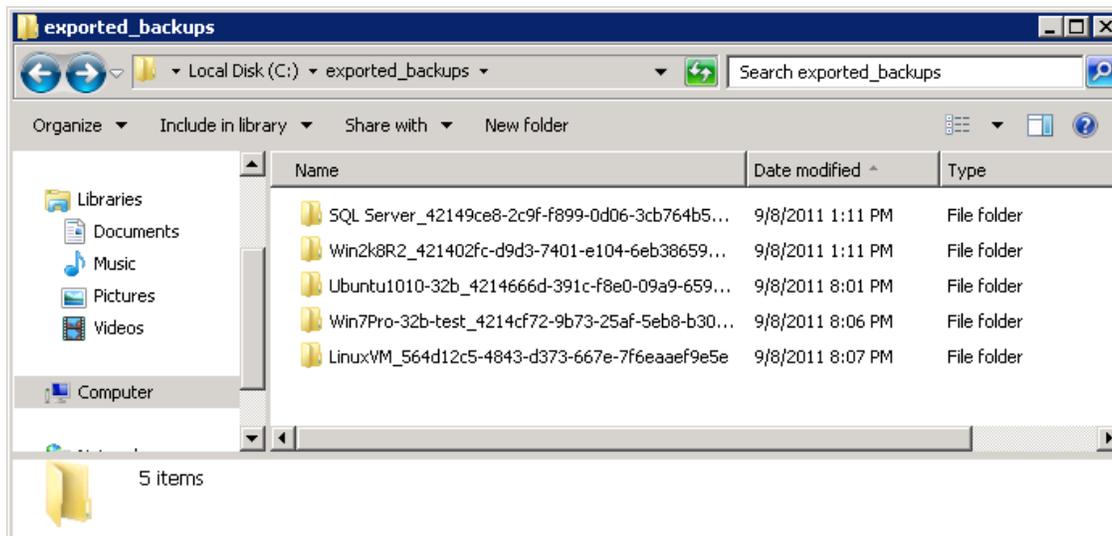


**Note:** The Windows Task Scheduler can be used to both **create** and **edit** job schedules after they have been created with the Create Job wizard. If you did not select to add the job to the Task Scheduler, you can use a batch script or another scheduling program to run your export jobs.

## Viewing Exported Backups

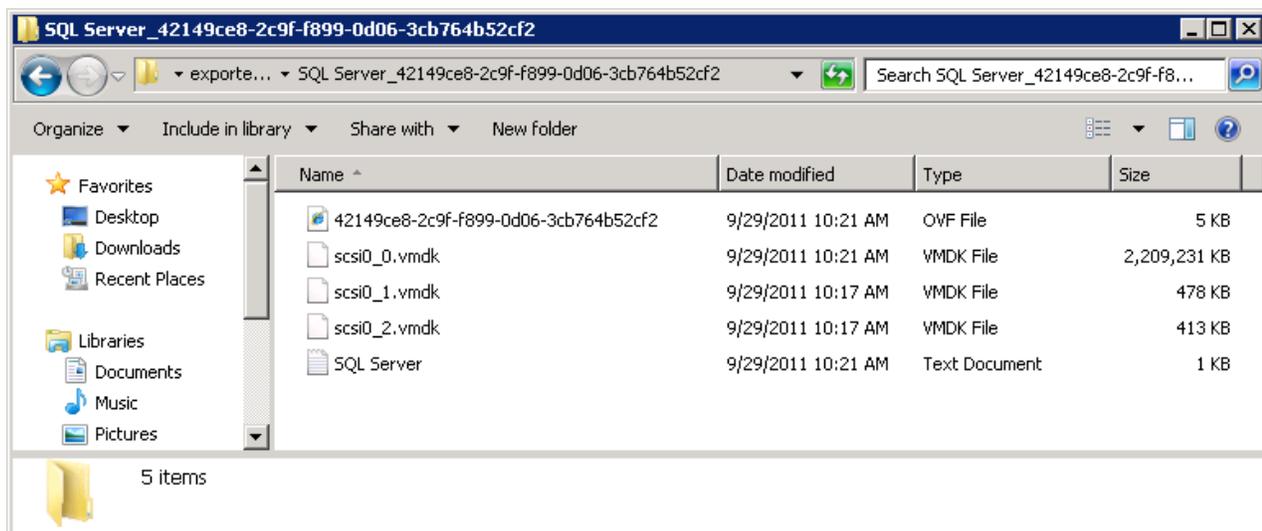
After an export job runs and the files have been exported, they are available in the staging location you defined. Files are exported as standard OVF's with the appropriate VMDK files. The folder structure of the staging location consists of individual folders per exported VM, each folder named according to the VM name and UUID, as seen in the following image.

**Figure 2 - 3. Folders created in the staging directory**



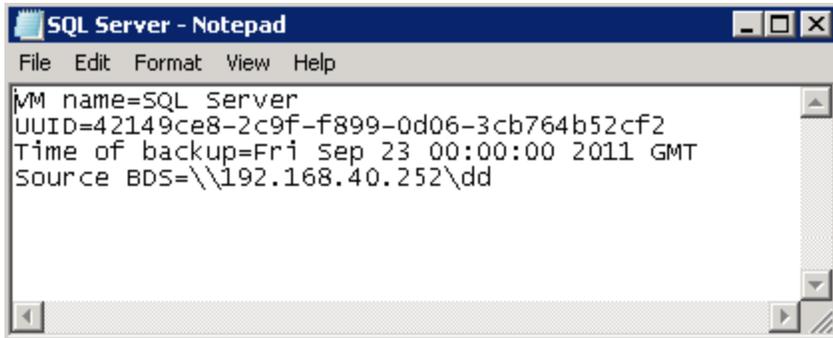
If you open one of the individual export folders, you will see the OVF, the associated VMDK files, and a text file with details about the VM backup that was exported. The following image shows an exported backup of a SQL Server VM.

**Figure 2 - 4. Example of an exported backup**



The text file created with each export contains details about the backup that was exported, including the VM name, the VM UUID, the time the backup was taken, and the backup storage location it was exported from.

**Figure 2 - 5. Example text file included with each exported backup**



**Note:** Exported hardware version 4 virtual machines will be created as hardware version 7 VMs.

Once the files have been exported, you can use your own third-party applications to sweep these files to tape or for use with other long term storage or archive solutions.

## Importing OVF's

If you need to recreate some or all of your VMs quickly by importing the files you exported with the PHD Exporter back into your environment, you can do so using native hypervisor tools.

VMware provides a tool, **VMware OVF Tool**, that will let you import OVF's to your hypervisor. Using the command-line version of the tool, you can create a script to run multiple OVF imports at the same time. Refer to the VMware OVF Tool documentation on the VMware web site and the VMware knowledge base for details.

XenServer provides a tool called **XenConvert** that lets you convert OVF's into a format that can then be imported into your hypervisor (for example, XVA). To import multiple files at once, you can create a script to run the XenServer import command to import each of your VMs. Refer to the XenConvert documentation available on the Citrix XenServer web site and the Citrix Knowledge Center for details.

**Note:** Exporting backups from one hypervisor then importing those OVF's into another hypervisor (VMware ESXi to Citrix XenServer, for example) may work in certain circumstances, but is not supported.

## Using NFS shares with the PHD Exporter

You can both export backups from, and store exported backups on, NFS shares with the PHD Exporter. Accessing NFS shares from Windows, though, requires some additional configuration. The guidelines below include one possible solution for accessing NFS shares on Windows 2003 Server and Windows 2008 R2. For additional details on configuring Windows to access NFS shares, including the use of third-party applications, refer to your local system administrator.

### **Windows 2003 Server**

To access NFS shares from Windows 2003 Server, you can install and configure **Windows Services for UNIX** then make sure the following services are running: **Client for NFS** and **User Name Mapping**. In addition, User Name Mapping must be configured. Windows Services for UNIX is available for download from the Microsoft web site.

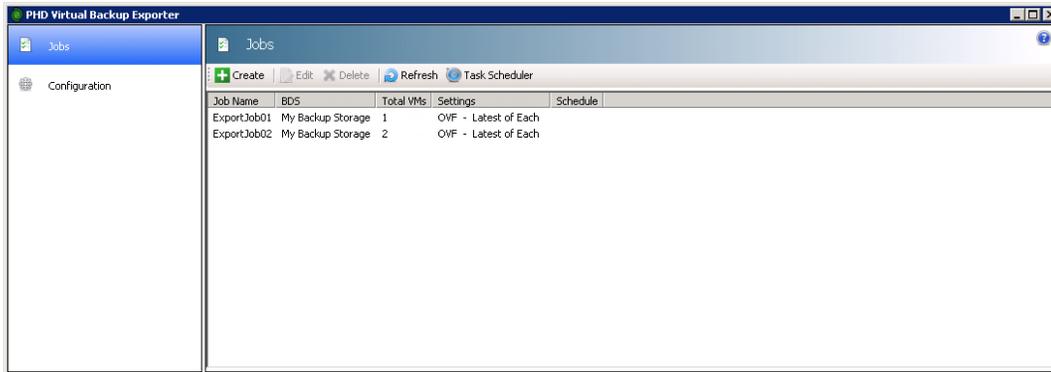
### **Windows 2008 R2**

To access NFS shares from Windows 2008 R2, you can install the **Services for Network File System** role (using Server Manager). In addition, an Identity mapping source may need to be configured in the Services for NFS Properties.

## PHD Exporter Console

After installing the PHD Exporter, you can use the PHD Exporter Console to configure and create export jobs.

**Figure 2 - 6. The PHD Exporter Console**

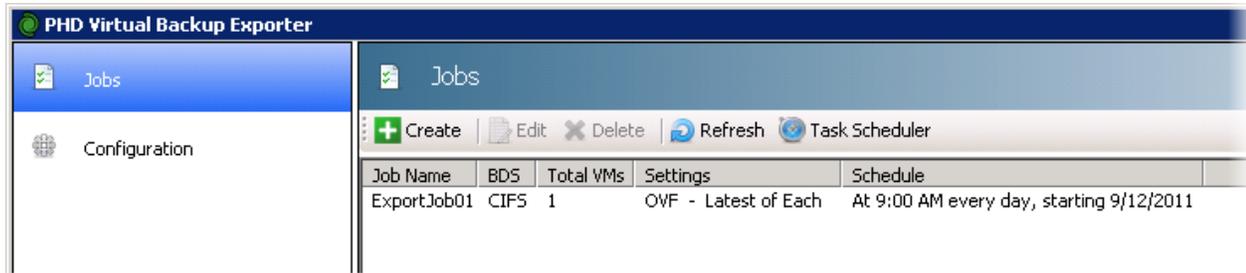


The PHD Exporter Console has two main areas, described in the next few sections.

- [PHD Exporter Console - Jobs on page 11](#)
- [PHD Exporter Console - Configuration on page 13](#)

## PHD Exporter Console - Jobs

The Jobs area displays all existing PHD Exporter jobs that you've created.



**Table 2 - Jobs toolbar buttons**

Toolbar button	Description
 <b>Create</b>	Opens the <b>Create Job</b> wizard to create a new export job. For details, see <a href="#">PHD Exporter - Create Job Wizard on page 21</a>
 <b>Edit</b>	Edit the selected job. You can edit the Job name, and VM backups selected for export. To edit the job schedule, use the Windows Task Scheduler.
 <b>Delete</b>	Delete a selected export Job.
 <b>Refresh</b>	Refresh the jobs list.
 <b>Task Scheduler</b>	Open the Windows Task Scheduler. After creating export Jobs, you will use the Windows Task Scheduler to edit the job schedule and to run the jobs.

After installing and configuring the PHD Exporter, you can create export jobs that will export selected VM backups to your staging location as OVFs.

**Note:** Backups created with PHD Virtual Backup versions prior to v5.3 are not supported for export by the PHD Exporter. If an export job contains backups from a previous version, a warning is reported in the logs and email report.

### To create an export Job

1. On the Windows staging server where the PHD Exporter is installed, click the desktop icon, or use the Windows Start menu, **PHD Virtual Backup > PHD Virtual Backup Exporter**.
2. In the **Jobs** area, click  **Create**. When the wizard opens, follow the steps to create your export job. See [PHD Exporter - Create Job Wizard on page 21](#) for details.

When the wizard closes, you will see the job in the **Jobs** list of the console.

### To edit an export job

To edit any job's settings, select the job and click  **Edit**. Note that if you added a job to the Windows Task Scheduler, you will need to use the Windows Task Scheduler to edit that jobs schedule.

## PHD Exporter Console - Configuration

Use the Configuration area to define the required and optional settings used by the PHD Exporter, including the staging location to store exported backups and email settings for receiving export job reports. The following sections describe each configuration area in detail.

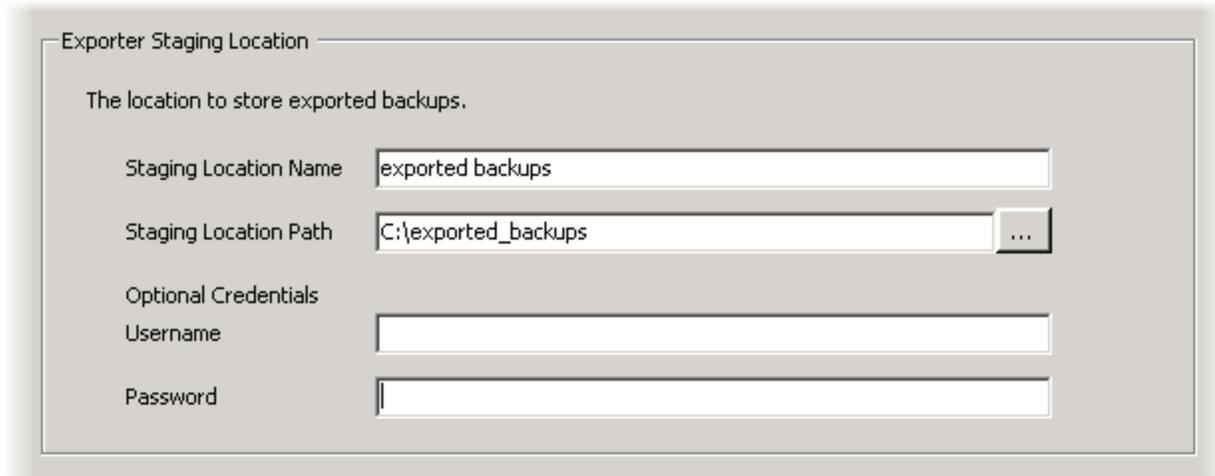
- [General Tab on page 14](#)
- [Backup Data Stores Tab on page 15](#)
- [Email Tab on page 18](#)
- [Support Tab on page 20](#)

## General Tab

Use the General tab to define the staging location to store your exported backups. This would typically be a local folder on the Windows server where the PHD Exporter was installed. Each time an export job runs, backups will be exported to this location.

### To define a staging location

1. Open the PHD Exporter Console.
2. Click **Configuration**. On the **General** tab, enter a descriptive name for the staging location, for example, *exported backups*.



The screenshot shows a configuration window titled "Exporter Staging Location". Below the title is the instruction "The location to store exported backups." The window contains four input fields:

- Staging Location Name:** A text box containing the text "exported backups".
- Staging Location Path:** A text box containing the text "C:\exported\_backups" and a small ellipsis button to its right.
- Optional Credentials:** A section containing two empty text boxes labeled "Username" and "Password".

3. Enter the path to the location. You can type the path directly, or navigate to the path using the ellipsis button. If the path you enter requires specific credentials to access, enter them in the **Optional Credentials** area.

Note that using an NFS share as your staging location may require some additional configuration. See [Using NFS shares with the PHD Exporter on page 9](#).

4. Click **Save**.

After defining the staging location, you'll next need to add PHD VBA backup storage location information. See [Backup Data Stores Tab on page 15](#)

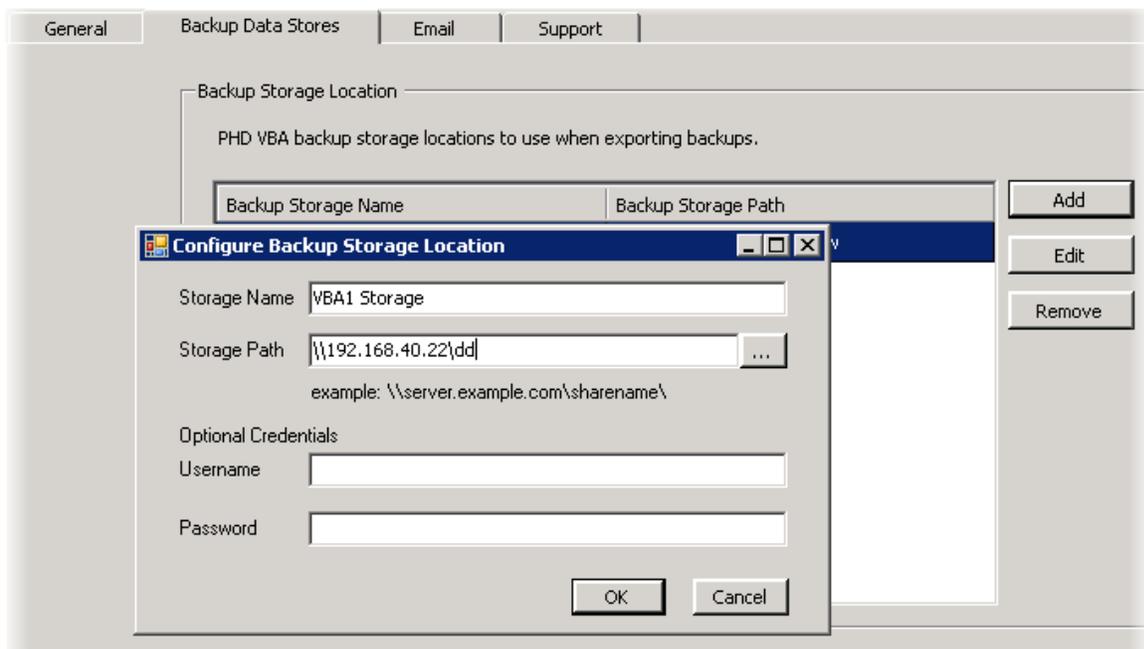
## Backup Data Stores Tab

Use this tab to enter existing PHD VBA backup stores from which you will export backups to your staging location.

**Note:** Full/Incremental backups are not supported for export.

### To add a new backup storage location

1. Open the PHD Exporter Console.
2. Click **Configuration**, then click the **Backup Data Stores** tab.
3. In the **Backup Storage Location** area, click **Add**. The **Configure Backup Storage Location** dialog opens.



4. Enter a descriptive name to use for the backup storage, for example, *VBA1 Storage*.
5. Enter the path to the location in the following format:

*\\server name or IP address\share*

Note that to use attached disks for export, they must first be shared using the PHD Console, Connectors tab. Also, if the path you enter requires specific credentials to access, enter them in the **Optional Credentials** area.

To use an NFS share, additional Windows requirements must be met - see [Using NFS shares with the PHD Exporter on page 9](#).

6. Click **Ok** to close the dialog.
7. Click **Save**.

**Note:** When using a shared local attached storage disk for export, if the PHD VBA's IP address changes, you will need to edit the Backup Storage and enter the new IP address. PHD VBA IP addresses can change if you are using DHCP in your environment.

Now when you create an export job, these backup storage locations will be available for selection. After adding the backup storage location, you can begin creating export jobs (see [PHD Exporter Console - Jobs on page 11](#)), or you can configure email to receive email reports with the status of each job (see the section, [Email Tab on page 18](#)).

## Email Tab

Use the email tab to enable email reports and to define your email settings. Email reports are sent at the completion of each export job and include the status of each VM export included in the job. You can also view reports using the Support tab - see [Support Tab on page 20](#) for details. Email settings include the server that the PHD Exporter will use to send email reports and the email addresses that should receive those reports.

The screenshot shows the 'Email' tab in the PHD Virtual Backup Exporter console. The 'Email Settings' section is active, showing options to enable or disable email reports. The 'Email reports using the following information:' option is selected. The configuration includes:
 

- Server Name: smtp.appsonline.com
- Port: 25
- Security: None
- Server requires credentials: checked
- Username: testreport@phdvirtual.com
- Password: masked with dots
- From Email Address: testreport@phdvirtual.com

 A 'Recipients' list contains 'user@phdvirtual.com'. Action buttons include 'Add', 'Edit', 'Remove', 'Test All', and 'Test Email'. A 'Save' button is located at the bottom right of the settings area.

### To enable email reports for export jobs

1. Open the PHD Exporter Console and click **Configuration** then click the **Email** tab.
2. Select the option: **Email reports using the following information:**
3. Enter the IP address or FQDN of the email server you would like to use to send email reports.
4. If your email server requires security, select the type from the **Security** menu.
  - **None** - do not use security.
  - **STARTTLS** - use STARTTLS security when sending email reports.
  - **SMTP over SSL** - use SMTP over SSL when sending email reports.
5. If the server requires authentication, select the checkbox and enter a username and password.
6. Enter a **From Email Address** (this is the address the PHD Virtual Backup emails will come from).
7. Click **Add** to add the email addresses that will receive the email reports. When added, the addresses will be displayed within the **Recipients** dialog box. To remove any email addresses, select the address in the **Recipients** dialog and click

**Remove.**

8. When you are finished configuring email reports, click **Save**.

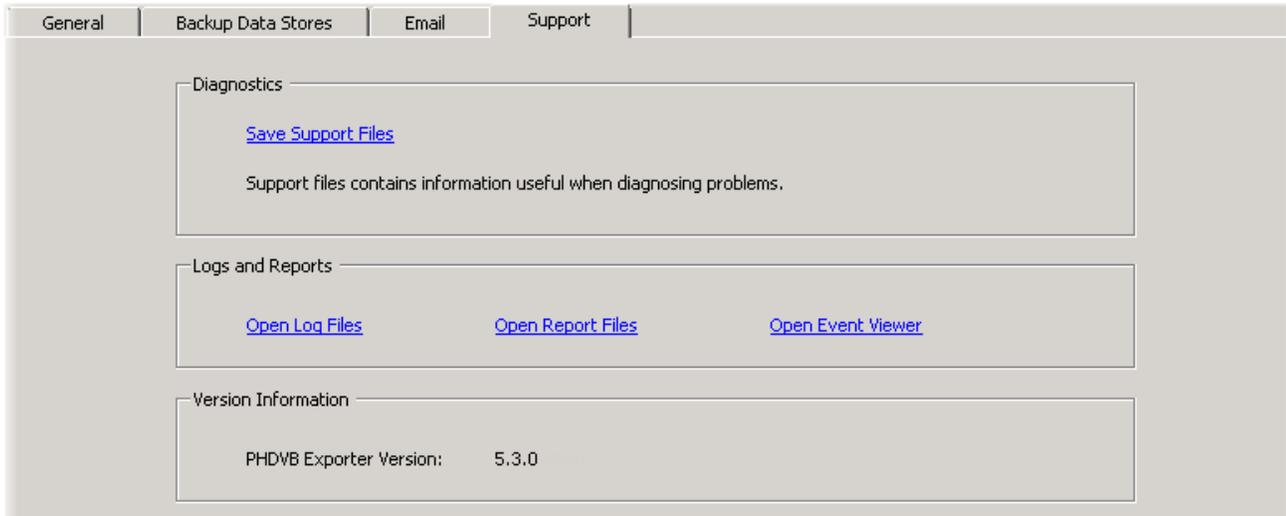
### **Testing email settings**

You can click **Test All** to send a test email to all email addresses entered in the Recipients dialog. To send a test email to a single email address, select the address in the **Recipients** dialog, then click **Test Email**.

A confirmation dialog is displayed when the email is sent. Verify the email was sent by checking to see if the email was received by the email client for the selected address or addresses.

## Support Tab

Use this tab to view the application version and to save support logs that can be used when troubleshooting issues with the PHD Exporter. Additionally, you can view the reports generated and sent after each export job completes.



### To save PHD Exporter support files

1. Open the PHD Exporter Console and click **Configuration**.
2. Click the **Support** tab, then in the **Diagnostics** area, click **Save Support Files**.
3. A compressed file is saved to the location you specify.

### Viewing PHD Exporter logs and reports

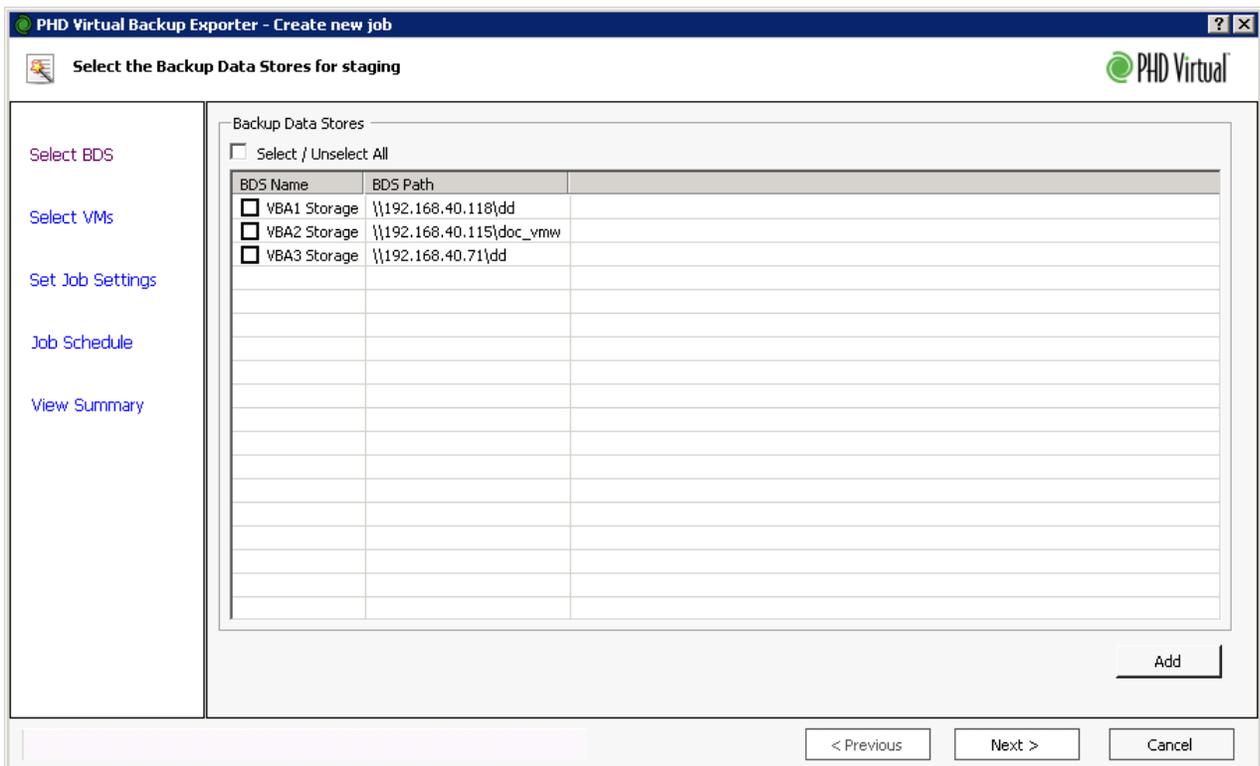
1. Open the PHD Exporter Console and click **Configuration**.
2. Click the **Support** tab, then in the **Logs and Reports** area, click the link to open either the Log Files, Report Files, or the Windows Event Viewer.

## PHD Exporter - Create Job Wizard

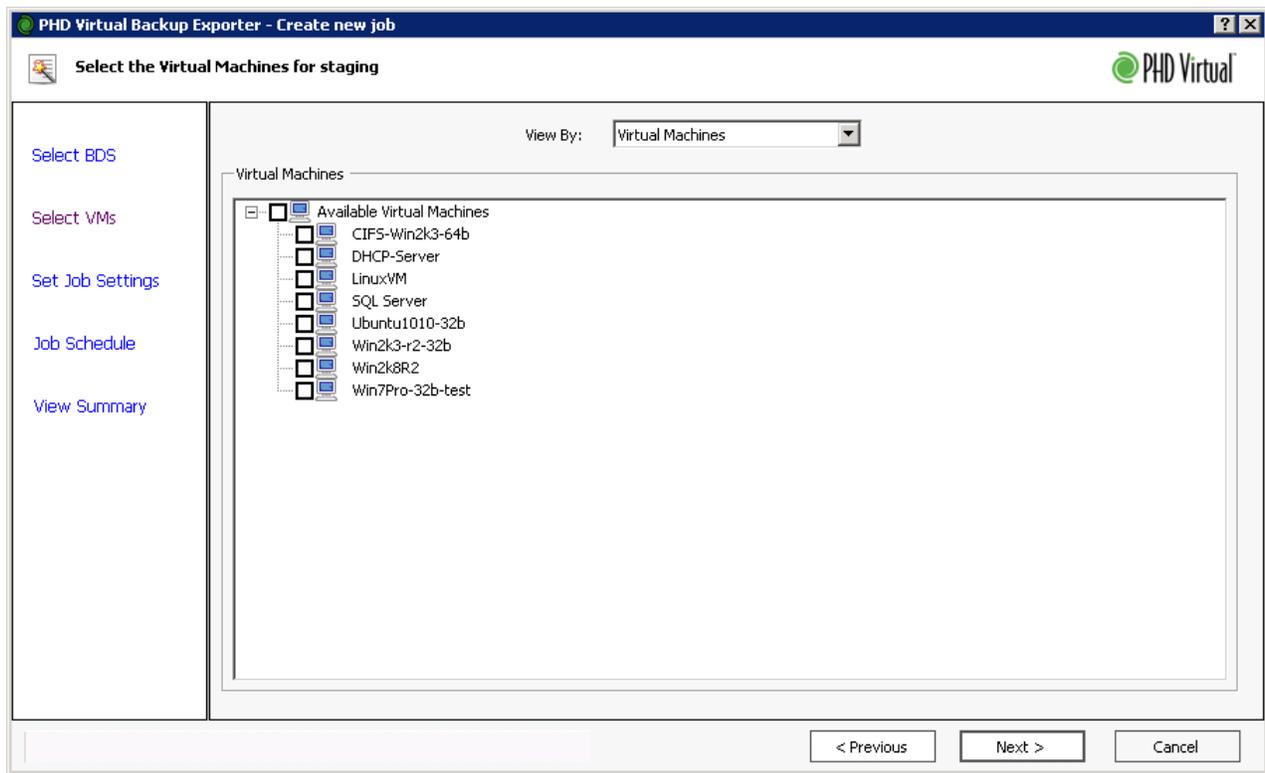
The Create Job wizard guides you through the steps required for creating an export job. The wizard can be accessed from the PHD Exporter Console's Jobs toolbar. Before running the wizard, the export staging location and at least one backup storage location must be defined using the Configuration area of the PHD Exporter Console.

### Using the Create Job Wizard

1. Select the backup storage location to use for exports. New storage locations can be added by clicking **Add**. Then click **Next**.

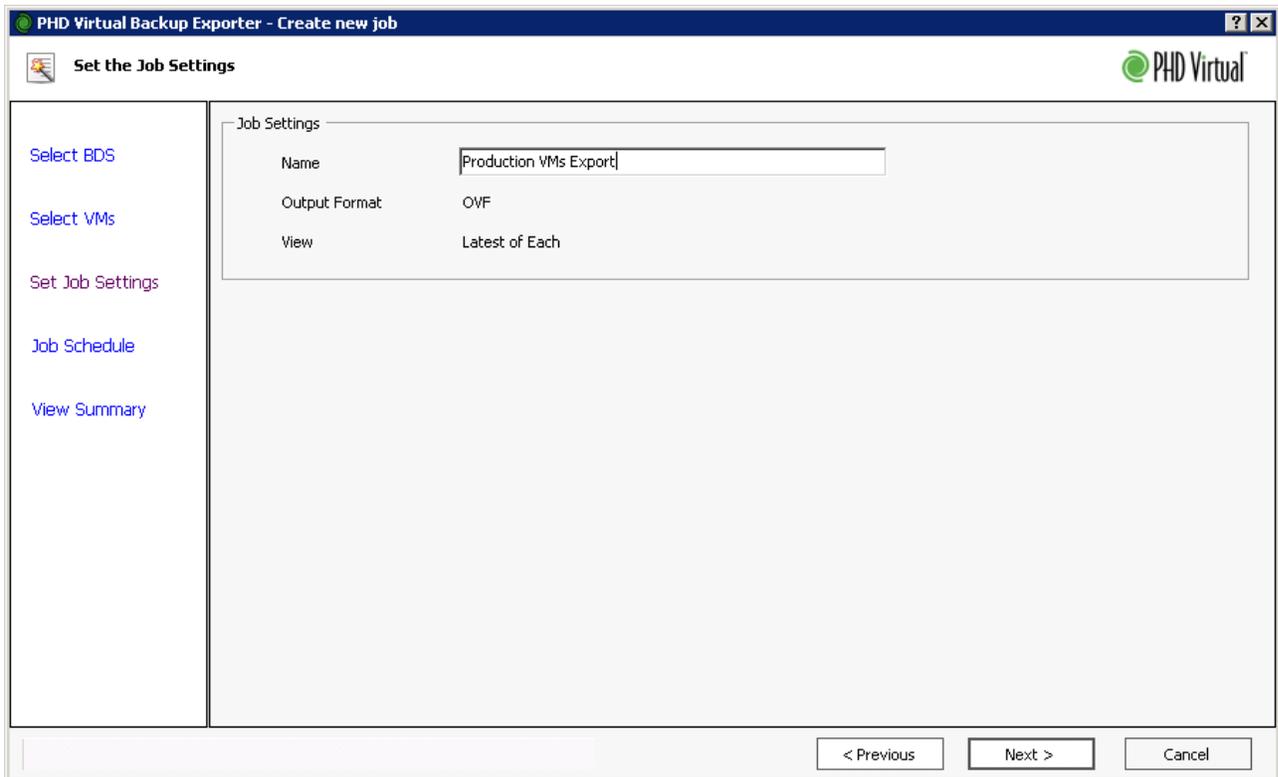


2. Select the VMs to export. Use the **View By** menu to select VMs by virtual machine name (Virtual Machines) or by backup storage location (Backup Data Stores). The most recent backup available for each selected VM is what will be exported each time the job runs.

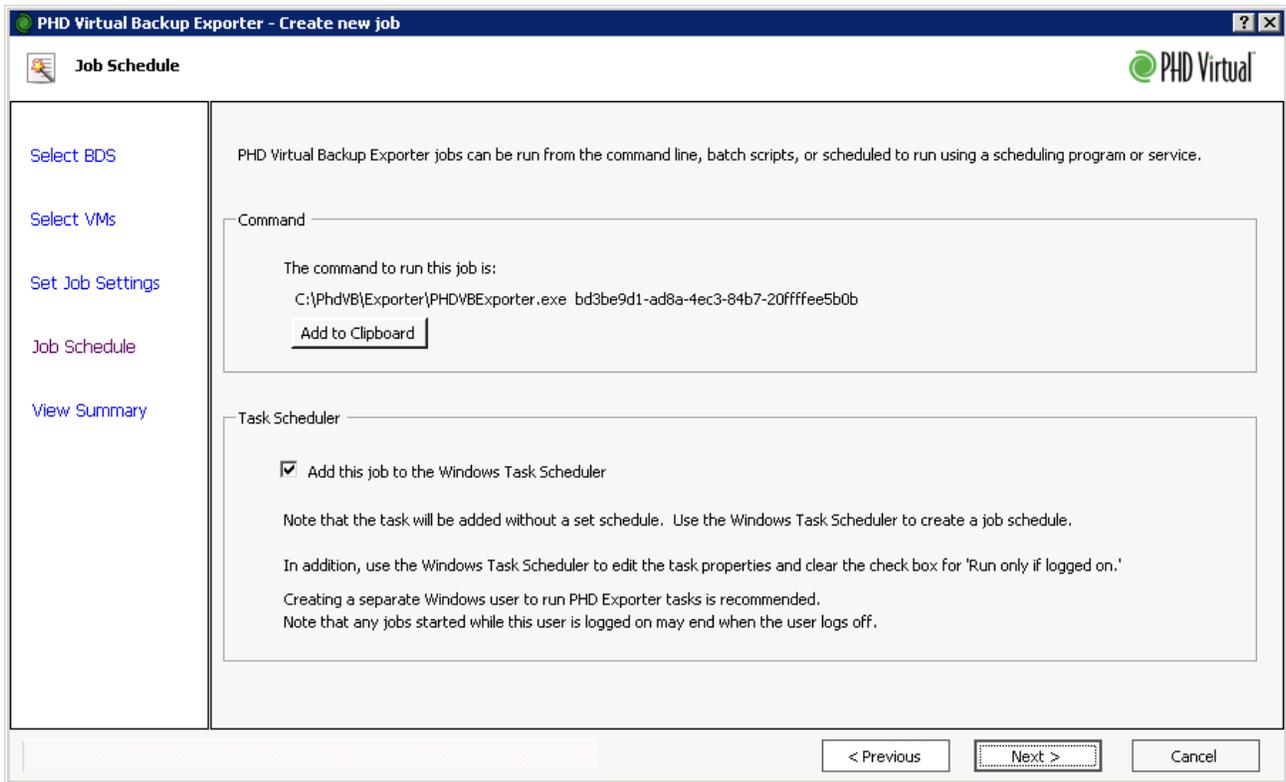


Note that when viewing by **Backup Data Store**, if a VM was backed up to multiple locations, it will be displayed within each (the latest backup for that VM will be displayed for each storage location). If you select a VM that is in multiple locations, it will also be selected in each additional Backup Data Store it is displayed. Though it appears selected multiple times, only the single latest backup will be exported.

3. Click **Next**.
4. At the **Job Settings** step, give the job a descriptive name, for example, *Production VMs Export*. The output format (OVF only) and View (Latest of Each) are also displayed - these cannot be changed.



5. Click **Next**.
6. The **Job Schedule** step lets you know how you can run the export job. If you select to **Add this job to the Windows Task Scheduler**, in addition to creating the schedule, specific task properties must be defined using the Windows Task Scheduler, depending on your version of Windows. See below for details.



If you do not add the job to the Windows Task Scheduler, you can use a batch script or another scheduling program to run the export job using the details provided in the **Command** area.

7. Click **Next**.
8. Review the summary information and click **Save**.

When the wizard closes, the job is displayed in the Jobs list. If you opted to add the job to the Windows Task Scheduler, a new Windows Task Scheduler task is created.

### To create export job schedules using Windows Task Scheduler

- **Window 2008 Server R2:**
  - a. In the PHD Console **Jobs** area, click **Task Scheduler** to open the Windows Task Scheduler.
  - b. In the Windows Task Scheduler, find the job you just created in the **Task Scheduler Library**.
  - c. Edit the properties of the job. In the **Triggers** tab, click **New**. Use the dialog that opens to set the job schedule.
  - d. In the task properties, also select **Run whether user is logged on or not** and **Configure for: Windows 7, Windows Server 2008 R2**.
- **Windows 2003 Server:**
  - a. In the PHD Console **Jobs** area, click **Task Scheduler** to open the Windows Task Scheduler.
  - b. In the Windows Task Scheduler, find the job you just created in the list of tasks.
  - c. Edit the properties of the task by right-clicking the task name and selecting **Properties**.

- d. On the **Schedule** tab, click **New**. Use the options to set the job schedule.
- e. In the task properties, also clear the check box for **Run only if logged on**.

Note that creating a separate Windows user to run PHD Exporter tasks on Windows 2003 is recommended. Also note that any jobs started while that user is logged on may end when that user is logged off.



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