

The series that focuses on why

Backup and Restore

5 Things to Remember for pfSense Software

Overview

We've all heard, or even said, those five dreaded words: **Did you make a backup?** You know when you hear those words, your life probably just got a little bit more difficult.

It sounds simple, and it's certainly a best practice, to routinely make backups. It isn't always so simple. Life gets hectic and with all of the other responsibilities, making a backup might be the furthest thing from your mind. Especially when everything is running smoothly.

Within pfSense® software, there are several backup and restore options and considerations. This *Why To Series* is to help you understand the various options to make sure that when you hear, "Did you make a backup," you can say, "yes".

1. Backup and Restore

Backup & Restore is an option available from the **Diagnostics** menu from the pfSense webGUI. The page is split into three sections to Backup Configuration, Restore Backup, and Package Functions. The backups you make are saved onto the system you are connecting from as an XML file that includes the date and time the backup was created in UTC.

When you get to the Backup and Restore page, there are three main sections: **Backup Configuration** at the top, **Restore Backup** in the middle of the page, and **Package Functions** as the last section.

Options are presented as checkboxes in the sections. If you'd like to see more detail about the options, go to <https://www.netgate.com/docs/pfsense/backup/configuration-backup-and-restore.html>.

2. Automatic Configuration Backup Service

There's been a lot of conversation about AutoConfigBackup lately in the blog and the newsletter. The services formally known as "pfSense Gold" will still be available, but free to all beginning with pfSense software version 2.4.4. AutoConfigBackup is one of the best of those services.

AutoConfigBackup, once configured, will automatically create an *encrypted remote (cloud based)* backup of your configuration every time you make a change to the configuration. You can save the latest 100 configuration backups for each pfSense device.

With pfSense version 2.4.4 (including current snapshots), navigate to **Services -> Auto Config Backup** to use the service.

If you are using the package that was available with a pfSense Gold Subscription (called Legacy ACB), visit **Diagnostics -> AutoConfigBackup** to access the package.

You will still be able to view or restore your Legacy backups by clicking the **Legacy** button on the ACB page.

You can find a lot more information on the Automatic Configuration Backup Service at <https://www.netgate.com/docs/pfsense/backup/autoconfigbackup.html>.

3. Automatically Restore a pfSense Configuration During Installation

Beginning with pfSense version 2.4, the pfSense installer has a **Recover config.xml** option which will read the configuration off of an existing installation before it is overwritten. This makes it useful for upgrades, filesystem changes, or many other situations when a reinstallation is required on the same hardware.

A word of caution, as with any upgrades or changes, it's always a good idea to make a configuration backup to other media first.

To learn more about how to Automatically restore a configuration during installation, please visit <https://www.netgate.com/docs/pfsense/backup/automatically-restore-during-install.html>.

4. Performing a Remote Backup of a pfSense Configuration

AutoConfigBackup is clearly the easiest way to go, especially now that it will be free to use with pfSense version 2.4.4, but performing a remote backup of your pfSense configuration is also possible.

If you are working in a lab without Internet access, or in a secure, government facility, AutoConfigBackup may not be an option. You may also need to follow site-specific policies that restrict backup procedures or want to feed into an existing backup infrastructure.

If you would like to perform a remote backup, visit <https://www.netgate.com/docs/pfsense/backup/remote-config-backup.html> for complete instructions.

5. Restoring a pfSense Configuration to a Different Version

Whenever we talk about backing up and restoring, it's a good idea to understand any limitations. Generally speaking, an older configuration can be restored to a newer version of pfSense.

You cannot revert a newer configuration to an older configuration using restore. Although possible in some cases, it is not recommended as we do not support or test these scenarios.

The biggest thing to remember is that the hardware you restore to configuration to should be similar or identical to the hardware the backup was made from. Restoring a configuration to a different type of system can have unpredictable results.

Visit <https://www.netgate.com/docs/pfsense/backup/restoring-a-pfsense-configuration-to-a-different-version.html> for all the details about restoring to a different version.

About Netgate

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