

User Guide

Box Backup & Recovery

Box UG 24.4.1

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1 Preface

1.1 About This Guide

Thank you for selecting CloudAlly for Box. Relax! All your Box data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your data on industry-leading AWS S3 storage. Our product's ethos is to provide feature-rich backup and recovery with security, ease of use, and flexibility woven in.

CloudAlly is cloud-native, a full cloud-to-cloud solution. No installation is required, the setup is hassle-free, backup is easy, and there are flexible recovery and export options. Read on for instructions about how to activate and manage your backups, restore your data by keyword, from any point-in-time, and at any granular/hierarchical level, export your backups to your own storage, activate summary/exception reporting, and set up MFA and other helpful features.

Questions or comments? Please contact us at support@cloudally.com or search our Knowledge Base at https://support.cloudally.com/hc/en-us.

1.2 Audience

This guide is intended for individuals who administer CloudAlly for Box.

1.3 What's in This Guide

This guide is organized to help you find the information you need to manage CloudAlly for Box. It is divided into functional parts intended to support you as you manage your environment:

- Creating and Accessing Your Backup Account
- Backing Up Your Data
- Recovering Your Backed Up Data
- <u>Compliance</u>
- Filtering and Viewing Drill-Down Details
- Managing Your Account
- Managing Subscriptions and Payments



2 Creating and Accessing Your Backup Account

2.1 Prerequisites

To administer backups for the Box environment, the following is required:

Box Business Plan

2.2 Sign Up/Sign In from the CloudAlly Home Page

- 1. In your Internet browser, open cloudally.com and click Login.
- 2. Click **Customers**. The Sign In page is displayed.

	Free Stal
Sign In to your Account	
Emuil	
Panaword	
Escent your Anternacht?	
Spin In	
G Sign In with Google	
Sign in with Microsoft	
O Sign In with Okta	
Terms of Service and Privacy Statement	
Terms of Service and Privacy Statement	

3. If you don't have an account yet, click **Free Trial.** The Sign Up page is displayed.



First Marine Last Marrie
Email
Password # Confirm Password #
US East (Northern Virginia)
Submit
G Sign up with Google
Sign up with Microsoft
By creating an account, you agree to our <u>Terms of Use</u> and <u>Privacy Publo</u> , Well occasionally send you account related emails.

- 4. Complete the form, and then click Sign up.
 - Note: CloudAlly gives you the choice of numerous AWS data centers available in the dropdown menu "Location." These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, South Africa, India, and Japan. The ability to choose from a wide range of data centers helps our customers comply with local data sovereignty laws that regulate the physical location and movement of data. In addition, we also offer a "Bring Your Own Storage" (BYOS) option on request. This allows you to backup sensitive data in your own AWS S3 buckets, S3 compatible storage service, Azure, or Google Cloud Platform. Please contact support@cloudally.com for more information.
- 5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
- 6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your account.

Note: You can also enable Two-Factor authentication to provide additional security. For more information, see Managing Your Account .



7. After you log in, you will see the following screen, enabling you to begin creating your backup tasks:



2.3 Resetting Your Password

If you do not remember your password, you can easily reset it using the **Password Reset** function.

1. On the sign-in page, click **Forgot your password?** to start the process of resetting your password.



	Sign In to your Account
bob.smith@	@ca4software.onmicrosoft.com
Password	
Forgot your pass	word?
	Sign In
	or
G	Sign In with Google
	Sign In with Microsoft

2. The Password Reset page will appear.

Passwo	ord Reset
	password, enter s you signed up with
Email	
R	leset
ign in	Sign u

- 3. In the Email field, enter the email address that you used to sign up.
- 4. Click **Reset**, and the *Password Reset* window will appear.





The email will look as follows:

	CloudAlly.com
CloudAlly Backup Password Change Request	
Hi, Adam Smith,	
Account ID: adam_smith@cloudally.com	
A request to reset your Cloud been made by: adam_smith@	
If you approve this request, please click the the password reset.	e following link to complete
Reset CloudAlly Password	

5. In the email, click **Reset CloudAlly Password** to confirm the password reset, and the *Change Your Password* window will appear.



Fill-in the new passwor	rd
New Password	Ø
Confirm New Password	Ø
Save	

6. Enter your new password in the **New Password** field and again in the **Confirm New Password** field, and click **Save**.

After resetting the password, you will be directed back to the *Sign In to your Account*.



3 Backing Up Your Box Data

Box lacks the daily backup and archiving process necessary for you to restore data after it has been manually or automatically removed from the recycle bin. CloudAlly's automated daily backup of your Box data ensures that you can both quickly recover data from any point in time as well as export your archives for local storage.

With a few simple clicks, you can activate backups for all or selected users.

3.1 Supported Versions

CloudAlly supports backup and recovery of the following Box versions:

- Business
- Business Plus
- Enterprise
- Enterprise Plus

Note: Box personal versions are not supported.

3.2 Creating a New Backup Task

To create a new backup task:

- 1. Sign in to your account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
- 2. On the Homepage, click + Add Backup Task.



page	Homepage									
	(Q Search									8
₽ bs	9 Backups								(+	Add Bockup Task
a wery										1.
	MS Exchange E Microsoft Exchange	Bockup d 🖉	Groups/Teams Microsoft Groups /	e Z Teams	SharePoint / Microsoft SharePo	int.	Microsoft OneDrive	4	G Google Works	kspace 🤌 🧋
š vity	Succeeded		Succeeded		Succeeded		Succeeded		Succeeded	
	Total Mailboxes	12	Total Groups / Teams	19	Total Sites	22	Total Sites	8	Total Users	39
angs .	Active Mailboxes	12	Active Groups / Teams	3	Active Sites	2	Active Sites	8	Active Users	39
	Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	133.04 GB
	Last Snapshot	6 hours ago	Last Snapshot	4 hours ago	Last Snapshot	3 hours ago	Last Snapshot	2 hours ago	Last Snapshot	11 hours ago
	Next Backup	In 18 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 13 hours
	@ Recovery	Sackup Now	@ Recovery 7 Bu	eckup Now	G Recovery	ackup Now	S Recovery	kup Now	S Recovery	Backup Now
	Google Shared		Salesforce Sand	ibox 🖉 🍦	box Box #	a.	Dropbox Business	ez 🤘		
	Succeeded		Succeeded		Succeeded		Succeeded			
	Total Drives	28			Total Users	11	Total Users / Team folders	81		
	Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folders			
	Total Size	2.68 GB	Total Size	24.72 MB	Total Size	. 97,15 GB	Total Size	103.02 GB		
	Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
	Next Backup	In 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	In 17 hours		
	S Recovery	Backup Now	@ Recovery 9 to	ickup Now	G Recovery (7 B	ackup Now	G Recovery 4 Bac	kup Now]		
b					Comment (1.0		Commenter () and			

The following page is displayed:





3. Click **Box**. The following screen appears.



- 4. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
- 5. Click **Authenticate in Box**. You will be directed to the *Box login* page, where you need to add your user name and password. Click **Authorize**.
- 6. You will be redirected to the *Backup Settings* page, where you can adjust the settings of the backup.

O Homepage	Box Bockup 🖋 Homepage > Box Backup				
jobs	box Connected @				٥
G Recovery & Activity	Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billi	ng amount			
Sectings	 Index all data for Search. Automatically activate new users:	Backup Datacenter Europe (Itelands Backup Frequency	0	Retention Period Unternited Backup Hour (UTC)	0
	Retain auto-archived backups for days before deleting 🕲	Daily		1:00	
					Concel Sove

On this page, you can adjust the backup settings and activate backups for the Box users. See the sections below for the detailed procedures.



3.3 Configuring Backup Settings

To access the configuration screen, click the gear-shaped settings icon.

C Homepage	Box Backup				
jobs					0
Recovery	Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly	or annual billing amount			
Activity	Index all data for Search 0	Backup Datacenter	0	Retention Period	0
Settings	Automatically activate new sites	6 Europe (treland)			
0.03	Automatically activate new sites (1)	Backup Frequency		Backup Hour (UTC)	
	Retain auto-archived backups for days before deleting 💿 3	2 Daily		4:00	~
					Cancel Save

- 1. You can change the name of the backup task by clicking the pencil icon.
- 2. The icon next to the Box logo displays whether the application was able to connect to the specified Box account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the Connected icon changes to Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
- 3. By default, the "Index all data for Search" option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact support@cloudally.com.
- 4. The Automatically activate new users option instructs the system to detect new users, and activate them automatically.
- 5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

Note: The **Backup Data Center** and **Retention Period** fields are "display only," and their values can't be changed here.



6. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.

The **Retention Period** field displays whether a retention period has been set up. By default, we provide unlimited retention of your daily backups for as long as you maintain your account subscription. You can override this default and specify a retention period in days, months, or years by contacting CloudAlly support. Backups older than the retention period specified will be automatically deleted.

Note: Your backup storage location cannot be changed once it's been set during the account setup process. Contact CloudAlly support if you need to move backups to a different geographic region, or if you'd like more information on our "Bring Your Own Storage" (BYOS) option.

7. Backup Frequency and Backup Hour

- a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 days
 - iii. Weekly
 - iv. 3 times a day
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.
- **Note:** 3x daily backups might be subject to additional charges. Please contact CloudAlly support or your sales representative if you have any questions before changing the backup frequency.

3.4 Activating Your Backups

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.



1. Scroll down to the list of users.

omepage	Box Backup 🖉 Homepage > Box Backup							
⊞ jobs								۲
(S) ecovery								-
8 Activity	6 Total Users Active Paused Archived							3
Gettings	C Search Users) (🖘 Filter by tag			Stotus	Togs	Act	don ~
	Username	0 Email	t Tags	Status 0	Backup Size 💠	Last Backup 🗘	Backup	
	Bob Smith	Bob.Smith@ca4software.onmicrosoft.com		 Success 	1.53 GB	6 hours ago	Cîi 9	v
	Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com		Success	6.25 GB	6 hours ago	Gi 9	v
	Sarah Johnson	Sarah Johnson@ca4software.onmicrosoft.com	Manager	Success	2.01 GB	6 hours ago	Gi 9	v
	Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.com	Manager	Success	182.45 MB	6 hours ago	6î 9	Ŷ
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com		 Success 	38.23 MB	6 hours ago	Cî 9	~
	Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com		Success	9.67 MB	6 hours ago	Gi 9	~

- 2. Select one or more user(s).
- 3. Click Action > Activate. The status of your backups will now be "Scheduled." This means that they will be backed up at the time that you selected on the Configuration screen.

b								
61	Total Users							(
Activ	ve Paused Archived							
	Search Users	= Filter by	tag		Stotus	t 👻 (Taga v		ction 个
								Activate
	Username	© Email	t Tags	Status ‡	Backup Size 🔅	Last Backup 💲		Pause Backup N
	Bob Smith	Bob.Smith@ca4software.onmicrosoft.com		 Success 	1.53 GB	6 hours ago	-	Delete
	Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com		Success	6.25 GB	6 hours ago	ti i	7
	Sarah Johnson	Sarah.Johnson@ca4software.onmicrosoft.com	Manager	Success	2.01 GB	6 hours ago	Gi (2
	Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.com	Manager	Success	182.45 MB	6 hours ago	G (2
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com		 Success 	38.23 MB	6 hours ago	tî (7
	Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com		Success	9.67 MB	6 hours ago	Gi 4	4



4. Alternatively, if you prefer to perform an immediate, on-demand backup, click **Action** > **Backup Now**.

If you forget to activate any of your backups, there will be an indicator on the Homepage that reminds you:

box Test 1 Ø Box	ø
0 out of 9 users have activated backups.	9
Active Users	0
Total Size	0 MB
Last Snapshot	Never
Next Backup	n 8 hours
S Recovery Backup Now) :

3.5 Securing Your Backups

By default, all primary and secondary users can preview, browse, and recover any backed up data. This could be a security risk if sensitive information is contained in the backup snapshots.

Primary users can limit access to one or more sites, drives, accounts, or users so that only they will be able to see, restore and export this data.

- 1. Primary user: From the *Homepage*, click the name of the service whose data you would like to restrict.
- 2. Click one or more users.
- 3. Click Tags, and check the Limited Access tag.



((Status 🗸 Togs	Action ~
¢ Email	÷ Tags	Status ‡	Q. Search tags	Backup
bob.smith@ca4software.onmicrosoft.com		😔 Success	Umited Access	31 P
alex.douglas@ca4software.onmicrosoft.com		Success		3 1 9
rosy.white@ca4software.onmicrosoft.com		Success	*	n 9
charles.parker@ca4software.onmicrosoft.com		Success	 Apply 	- 11 - 9
	C Email bob.smith@ca4software.onmicrosoft.com alex.douglas@ca4software.onmicrosoft.com rosy.white@ca4software.onmicrosoft.com	Email Tags bob.smlth@ca4software.onmicrosoft.com	Email E	Email C Tags Status C Success Jex.douglas@ca4software.onmicrosoft.com Jex.douglas@ca4software.onmicrosoftware.onmicrosoftware.onmicrosoftware.onmicrosoftware.onmicrosoft

4. Click Apply. You will be asked to confirm:



5. The tag will now appear in the **Tags** column as follows.

33 Total Users ctive Paused Archived									(3)
G Search by account name or email		😑 Filter by tag				Statu	s v (Togs -	Acti	ion 🗸
]√ Username	¢	Email	0	Tags	Status 0	Backup Size 🔅	Last Backup 💲	Backup	
Bob Smith		bob.smith@ca4software.onmicrosoft.com		C Limited Access	 Success 	51.01 GB	8 hours ago	Gi 🖗	
Alex Douglas		alex.douglas@ca4software.onmicrosoft.com			 Success 	100.35 KB	8 hours ago	G 9	
Rosy White		rosy.white@ca4software.onmicrosoft.com			Success	14.89 GB	one day ago	Gi 9	
Charles Parker		charles.parker@ca4software.onmicrosoft.com			Success	3.39 MB	8 hours ago	Gi 9	
Sarah Johnson		sarah.johnsonca4software.onmicrosoft.com			Success	3.55 MB	8 hours ago	6 9	

This will prevent secondary users from browsing and recovering the data.

To remove the tag, the primary user should simply reverse the process - un-check the Limited Access tag, and re-apply.

3.6 Deleting a Backup

You can delete individual user backups or the entire backup service from your account if you do not want to use them further. The following sections guide you through the process of removing backup services and individual user backups.



3.6.1 Deleting a Backup Task

To remove a backup task for a service, on the *Homepage*, click Menu > **Delete Backup** adjacent to the backup task you want to remove.

Box Bockup #	Total Ø Active Ø Total Size Last Swapshot Next Backup Ø Badva Nava 1
box Box	6 0 0 MB Never In 13 hours @ Badva Nava 1
Socceeded	6 December Backup
	Cii Paue Bacup 😙 Deiete Bacup

The **Confirm Delete** pop-up window is displayed with a warning message.

Are you sure you wish to delete Box / Bob.Smith@ca4software.or		Ċ
	Cancel	Delete

Click **Delete**. The selected backup service is removed from your account.

To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

3.6.2 Deleting an Individual user

To delete an individual user:

- 1. Click the backup task from which you want to delete the user. The backup task settings page is displayed.
- 2. Add a check next to the user that you want to delete. Click **Delete** in the **Actions** menu.



3				bol	smith@ca4software	onmicrosoft.com Bo	ob Smith	Log Out
Box Bockup Homepage > Bo								
	Connected @							0
© 6 Total U & Active Present								٢
Service Carterion) (a tendint			Status	s v) (tops v		Activate
Use Use	sname	0 Email	0 Tags	Status 0	Backup Size 🔅	Last Backup		Pause Backup Nov
Bob 5	Senith	Bob.Smith.gcafsoftware.onmicrosoft.com		Scheduled	0 Bytes	Never	¢	Delete
	Seath Douglas	Bob Smithlycarkoftware.ormicrosoft.com		 Scheduled Scheduled 	0 Bytes 0 Bytes	Never	0 0	
Alex I								2
C Alex	Douglas	Alex.Douglasgica4software.onmicrosoft.com		C Scheduled	0 Bytes	Never	ca 9	2 ×
C Ant	Douglas Ins Whon	Alex.Douglasijica4software consistenti com Otarles.Witemijica4software consistenti com		Scheduled	0 Bytes 0 Bytes	Never	61 9 61 9	2 × 2 ×

3. A pop-up window is displayed with a list of users selected for removal. Click **Delete.** The selected users are removed from your account.

To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

3.7 Usage Reports

In order to provide greater clarity to you about which users CloudAlly is backing up, you can export a CSV file that lists all of the entities that were backed up, including the status of each entity (active, inactive, or archived).

To export a usage report, click the **Export** button, next to **Add Backup Task**. The report will be sent to you via email.



Caseeth)			
9 Backups				+ Add Backup Tas
MS Exchange Backup 🦸 🧳	Groups/Teams / /	SharePoint / J	OneDrive # Microsoft OneDrive	G Google Workspace
Succeeded	Succeeded	Succeeded	Succeeded	Succeeded
Total Mailboxes 12 Active Mailboxes 12	Total Groups / Teams 19 Active Groups / Teams 3	Total Sites 22 Active Sites 2	Total Sites 8 Active Sites 8	Total Users Active Users
Total Size 53.19 MB	Total Size	Total Size 73.00 MB	Total Size 17.83 MB	Total Size 133.0
Last Snapshot 6 hours ago Nest Backup In 18 hours	List Snapshot 4 hours ago Next Backup In 20 hours	Last Snapshot 3 hours ago Next Backup in 20 hours	Last Snapshor. 2 hours ago Next Backup In 20 hours	Last Snapshot 11 hours Next Backup In 13 h
The Country (The Charles Now) i	(@ Recovery) (\$ Suckag Now) i	@ Recovery 🖓 Backup how j	\varTheta Recovery 🖓 Backup Now 1	Statute Now
Google Shared Drives J ?	Salesforce Sandbox #	box Box #	Cropbox Business / /	
Succeeded	Starcounderd	Succeeded	Successivel	
Total Drives 28		Total Users 11	Total Users / Team folders 81	
Active Drives 28	Total Seats 4	Active Users 11	Active Users / Team folders 81	
Total Size 2.68 GB	Total Size 24,72 MB	Total Size 97.15 GB	Total Sze 103.02 GB	
Lest Snapshot 9 hours ago	Last Snapshot 14 days ago	Last Snapshot 12 hours ago	Last Snapshot 7 hours ago	
Next Backup In 15-hours	Nest Backup In 4 hours	Next Backup In 12 hours	Next Backup In 17 hours	
G Recovery (V Backup Now) E	G Recovery (Backup Now) 1	B Recovery (Stackup Now) 1	S Recoury (& Eachup Now)	

3.8 Modifying the Settings of an Existing Backup

To modify an existing backup task:

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.

	Q Search									0 =
	9 Backups								(+)	Add Backup Task
e 1	MS Exchange I Microsoft Exchan	Bockup 🕗 🦉	Groups/Teams Microsoft Groups	/ Teams	SharePoint / Microsoft SharePoi	e.	OneDrivé & Microsoft OneDrive	<i>a</i> *	G Google Work Google Workspi	space a 🦉
	Succeeded		Succeeded		Succeeded		Succeeded		Succeeded	
	Total Mailboxes	12	Total Groups / Teams	19	Total Sites	22	Total Sites	8	Total Users	39
	Active Mailboxes	12	Active Groups / Teams	3	Active Sites	2	Active Sites	8	Active Users	39
	Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	133.04 GB
	Last Snapshot	6 hours ago	Last Snapshot	4 hours ago	Last Snapshot	3 hours ago	Last Snapshot	2 hours ago	Last Snapshot	11 hours ago
	Next Backup	In 18 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 13 hours
	(@ Recovery)	Backup Now	G Recovery	lackup Now	@ Recovery 🖓 Ba	ckup Now	@ Recovery 🖓 Bac	kup Now	Secovery	Backup Now
	Google Shared	d Drives 🤌 🥔	Salesforce San Salesforce	dbox 🖉 🍦	box Box #		Dropbox Business	e		
	Succeeded		Succeeded		Succeeded		Succeeded			
	Total Drives	28			Total Users	11	Total Users / Team folders	81		
	Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folders	81		
	Total Size	2.68 GB	Total Size	24.72 MB	Total Size	97,15 GB	Total Size	103.02 GB		
	Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
	Next Backup	In 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	In 17 hours		
	@ Recovery	Backup Now	@ Recovery	lackup Now E	@ Recovery (\$ Ba	chup Now]	G Recovery 4 Bac	kup Now]		



- 2. Click the Box icon from the list or enter a keyword in the Search field to find a specific task. The *Box Backup* page is displayed.
- 3. Click **Settings** on the top-right section of the screen to see the backup settings.

From here, it is possible to modify the fields described in <u>Configuring Backup</u> <u>Settings.</u>

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4 Recovering Your Backed Up Data

4.1 Using the Recovery Menu

The Recovery Menu provides you with options at a fine granularity for selecting which user to restore or export.

To recover your backed up data:

1. Click Recovery from the Navigation Panel. The *Restore* & *Download* page is displayed with all your active-backup account details.

tive B	Backup Accounts	
Search	h	
TR	Microsoft Groups / Teams 1 group / team test	
6	Microsoft OneDrive 18 sites Test	
96	Microsoft Exchange 30 accounts Test	
xoo	Box 8 accounts Test	
G	Google Workspace 3 google accounts cloudrein.com	
\$	Microsoft SharePoint 13 sites	

- 2. Click the Box backup task from which you wish to recover the data.
- 3. The Restore or Download Box page is displayed.



Box Backup and Restore User Guide Recovering Your Backed Up Data

Jobs	Restore or download Box Backup task: Box Backup Restore & Download >Box Backup >agaliev@cloudally.com
S	Please select your preferred choice for restore
۵ Activity	Via Snapshot v A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.
දිරූ Settings	Data changed from Select date To
	Select date
	○ Via Item Search ∧ Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes ("). For example: "user@company.com" or "Important update".

- Select the radio button for your preferred restore method:
 - Via Snapshot (see Via Snapshot)
 - Via Item Search (see Via Item Search)

4.1.1 Restore or Download Via Snapshot

- 1. Enter the date range that you would like to restore using the *Data changed from and To* fields, and press **Continue**.
- 2. The list of backup snapshots within that date range is displayed. Select the snapshot you want to recover.



		bob.smith@ca4software.onmicrosoft.com Bob Smith Log 0
Restore or download from Box B	ackup archive	
	s, then click on "restore" to perform a non-destructive restore directly to the or	nline service, or "download" to create a zip extract of the data
DATE	service	ACTION
Oct 20 2022 05:04 PM	,Box:	Q
View 1 - 1 of 1	iii < Page 1 of t ≥ 30	
Restore Download		

- 3. Alternatively, you can click the magnifying glass in the Action column to drill down into the snapshot and view the structure of the backed up data. There you can select one or more items for recovery.
- 4. Once you select a snapshot (if you wish to recover all the data in the backup), or one or more items (if you wish to recover only selected items), the **Restore** and **Download** buttons become available.

4.1.1.1 Restore

If you click **Restore**, the restore confirmation window appears, asking you about the following:

- You can add an optional 50-character Job Label to differentiate it from other Exports and Restores on the Jobs page.
- Do you want to restore to another folder or account? If so, provide the new location information.
- Do you want to perform a non-destructive backup, where the restored files are added to a new folder? The folder name indicates that they have been restored.
- Or do you want to perform an in-place restore? There are two options:
 - **Replace**: The restored content will be located in the same folder as the existing content, not in a separate folder that is created when you choose non-destructive restore. Deleted items and folders will be restored from the snapshot. Existing items will be overwritten with the snapshot version.

Use this option: to restore or repair deleted / modified items

Bypass: The restored content will be located in the same folder as the existing content. Deleted items and folders will be restored from the snapshot. Existing items will be skipped.
 Use this option: to restore deleted data.



Please confirm the restore request
You are about to restore items from the archive of testaccount.vikas@cloudrein.com
Maximum 50 characters
Job Label (optional) 🕚 Enter Job Label
Restore to bob.smith@ca4software.onmic
Please select your restore method:
Non-destructive: Data will be restored to a folder.
In-place restore to the live site is also available, please select how you want to handle existing data:
O Replace: Restore will overwrite existing live data. O Bypass: Existing data will be bypassed and not restored.
A confirmation Email will be sent to you upon completion.
Cancel OK

The backup data that you selected will be restored to the location that you specified. When the recovery process is complete, a summary will be sent to your email.

You can also check the Jobs page to see the progress of your task. See <u>"Tracking</u> Recovery Tasks on the Jobs Page."

4.1.1.2 Export/Download

1. If you click **Download**, the following confirmation window appears.





2. Click the drop-down list and select one of the following storage locations:

Please confirm the export request	×
You are about to export items from the archive of Bob.smith@CA4software.onmicrosoft.com	
Export in .zip format:	
for download 🗸	
for download	
to your Amazon S3	
to your Azure Blob	
to your Box.com	
to your Dropbox	
to your AWS S3 compatible	
to your GCP storage	

- 3. If you select options other than "for download," you may be asked for additional credentials and/or access tokens for the selected storage locations.
- 4. Click **OK**. The download instructions are sent to your registered email address. The download link is only valid for 72 hours.
- 5. Or, you can check the *Jobs* page. (See <u>"Tracking Recovery Tasks on the Jobs</u> <u>Page."</u>) When the task is completed, the **Download Results** button will be active.



Recovering Your Backed Up Data

box	Box Backup Box Test123@cloudnein.com		Export			Succeeded
Started at Oct 20 202	1: 12 at 06:09 PM	Backup Date: Oct 20 2022 at 05:04 PM	feitiator: bob.amth@cafaoftware.onmicrosoft	Destination: Direct Download	Total Items: 12	5ize 4.78 MB
Cancel					Down	Nood Results View Log

6. Click Download Results, and a page will open, where you can access your backup file.

			(2
Homepage	Jobs jobs > Download Filetst		Recent Downloads X
)obs	Box Backup		Show all downloads [2
© Recovery	Bob.Srethigc.skoftware.ormicrosoft.com File hanne	0 Size	© Actions
8 Activity	* Bob Smith, Box, 12345.zp	4.78 MB	0
© Secongs			

4.1.2 **Restore or Download Via Item Search**

- 1. Select Via Item Search, and enter a word or phrase to search on.
- 2. Or, click the arrow next to the search bar, and enter search criterion in any of the Advanced fields: Author, file name or date.

	Store or downlo	oad Box Backup task: Box Backup	
Restore	r Download >Box Backup >agailev@Cloud.	any com	
Ple	ase select your preferre	ed choice for restore	
6) Via Snapshot 🔨		
A		ne application data taken at a specific date and time. Use this option to recover all of yo ecover a particular item.	our data, oi
) Via Item Search 🗸		
Us	se this option to search all the l	backup snapshots of this service for a particular keyword or name. To search for an exa double-quotes ("). For example: "user@company.com" or "Important update".	ict phrase,
	Search	~	
		Press V for advanced search	



- 3. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as Type, Name and Date. The details columns are different for different types of restored items.
- 4. Select items you would like to restore or download. When at least one item is selected, **Restore** and **Download** become available.
- 5. Follow the instructions in the <u>Restore</u> or <u>Export/Download</u> sections to complete the recovery process.

4.2 Tracking Recovery Tasks on the Jobs Page

The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

Note: To see the status of your Backups, click the name of the backup from the *Homepage*.

From the Navigation pane, click **Jobs**.

4.2.1 High-Level Summary

The top portion of the Jobs dashboard summarizes how many of your jobs are in progress, how many have successfully completed, and how many have partially succeeded or failed over the past 7 days.

2010/02/22	2 Total Jobs for last 7 Days					
~	0 In Progress		2 Successfully Complete	d	Failures	
to (Initiat	or · · · · · · · · · · · · · · · · · · ·	(Service v) (Status v)			(Q. Search by Task) (Q. Search by	inin 🕜 Order by 👻
box	Test123@cloudrein.com		Expo	rt		Succeede
Starte		Backup Date:	initiator:	Destination:	Total items	Size

To see a list of jobs that have any of these 3 statuses, click on the status, and your results will be filtered accordingly



4.2.2 Filtering

The next section allows you to filter by numerous criteria:

- Initiator: Who initiated the backup / restore?
- Activity: Filter by restores or exports.
- Service: Filter by one of the following services, such as:
 - Google Workspace
 - Google Shared Drives
 - Salesforce
 - Box
 - Dropbox
 - Google Account
- **Status**: Filter by one of the following:
 - In progress
 - Succeeded
 - Partially succeeded
 - Failed
 - Pending
 - Canceled
- Search by Task: Filter by a task, such as:
 - Box
 - Dropbox
 - Google Workspace
 - Salesforce

If you choose to filter using a particular service, then you can focus on a specific item in the search bar. You can also order by:

- Latest First
- Oldest First



4.2.3 Description of Each Job

- The rest of the screen provides a detailed description of each individual job that you ran.
 - **Type of Job**: Export, or Restore this appears as a large title within each job description.
 - Name, Service, and Account of the job.
 - Start date, backup date, initiator, destination, total items backed up or restored, and the size of the file(s).
- **Cancel** enables you to stop a job that is in progress.
- Download Results enables you to download a zip file with your recovery data.
- View Log redirects you to the System Activity page, which displays your account activity with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

O Homepage	Activity Activity > System activity							
adol.	20 Oct 2022 - 20 O	et 2022 🖄 Activity (1) 🗸 Service	e v Stotus	$\overline{}$			Box Bockup 🗸 🔍 📿 Test123@do	udre. v) 🕲
Recovery	Export O 2	10 Oct 2022 - 20 Oct 2022 O Box Back	up O Boksmithijka	4soft_com (0				Clear Filters
8 Activity	Activity	Date and Time	Service	Sub Service	Status	Task Name	Item	
(©) Settings	Export	Oct 20 2022 06:09 PM	bax	х ^ј	Succeeded	Box Backup / bob.smith@ca4softcom	bob.smithi@ca4software.omicrosoft.com	0

This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task.

The latter can be achieved by clicking the information icon in the Activity column. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution.



omepage	Activity Activity > System activity		
Jobs	20 Oct 2022 - 20 Oct 2022 🗎 🛛 Activity (1) 🗸 🥵	Service	s v
Recovery	Export • 20 Oct 2022 - 20 Oct 2022 • Box	Backup 💿 Bob.smith	n@ca4softcom
	Export 20 Oct 2022 - 20 Oct 2022 Box Activ	Backup Bob.smith Service	n@ca4softcom

5 Compliance

5.1 Delete Backed Up Data: GDPR's "Right to Be Forgotten" Option

The way to delete data items - emails and files- from a CloudAlly backup is to enable the GDPR (General Data Protection Regulation) "right to be forgotten" option.

To enable the ability to delete backed up items:

- 1. Request from CloudAlly support that they enable the GDPR delete button for you. They will ask you for the name of your account, and the service for which you would like to enable this.
- 2. From the Homepage, click **Recovery**.
- 3. Click the service that contains the item you would like to delete.

Note: It is not possible to delete an entire folder, only one or more items.

4. Click the arrow at the end of the row of the user that contains the item you would like to delete.

& Download >Box Backup			
ted below are the users within your Box u	sers ready for restore and download.		
USER	FIRST BACKUP	LAST BACKUP	ACTION
Search	🗙 All 🗸		
Agata.brown@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Mex.douglas@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
3ob.smith@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Charles.wilson@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
da.taylor@ca4software.onmicrosoft.com	196 days ago	10 hours ago	>
essica.miller@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Rosy.white@ca4software.onmicrosoft.com	215 days ago	10 hours ago	



5. Click "Via Item Search" and enter the desired search criteria.

Note: It is not possible to perform a GDPR delete using "Via Snapshot."

lease select your preferred choic	e for restore
 Via Snapshot A A snapshot is a copy of your online applica 	ston data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular term.
Via Item Search v Use this option to search all the backup sn Search phrase Search for	upphoto of this service for a particular leyword or name. To search for an exact phrase, including an enall address, use double-quotest ("). For example: "user@company.com" or "important update".
Table/Metadata type	
Account	·
Created By ID	
Enter Salesforce User ID	
Updated By ID	
Enter Salesforce User ID	
By unique Salesforce Record (D(s)	
Example 50030000008cut. 500300000	D0RoutQAA
Date from	
Select date	
Date to	
Select date	
is Defected	

ease select your preferred choice for rest	ore	
🔿 Via Snapshot 🔺		
A snapshot is a copy of your online application data tak drill down into the snapshot to recover a particular iter		ime. Use this option to recover all of your data, or
Shill down into the shapshot to recover a particular iter	1.	
● Via Item Search ∨		
Use this option to search all the backup snapshots of the		
including an email address use double-quotes ("). For (
.		
including an email address, use double-quotes ("). For a		
	example: "user@company.	
Search	example: "user@company.	
Search	example: "user@company.	
Search Author Enter e-mail address	example: "user@company.	
Search Author Enter e-mail address Item name	example: "user@company.	
Search Author Enter e-mail address Item name Enter a term that matches a part of the file name	example: "user@company.	
Author Enter e-mail address Item name Enter a term that matches a part of the file name Date from	example: "user@company.	



6. Select the item(s) you would like to delete, and click Delete.

f the data.			
	· ·]	Search	
I NAME	FOLDER	AUTHOR	LAST MODIFIED
Architectural design – draft 1 👲	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
🕽 Architectural design – draft 2 🔸	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
Component spec – authentication 🔹	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
Component spec - authorization 🛛 🐥	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
] Component spec – signature server 🖕	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
Component spec - EMM 🌲	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
Component spec - ECM 🔹	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 14, 2024
Redundancy plan 🔹	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 14, 2024
) Site map 🔹	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 11, 2024
🕽 Site map – detailed view 🔹	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 11, 2024
View 1 - 50 of 470	< < Page 1 of 10 > X		

Note: Ensure that the item you wish to remove is already removed from the source. If it is not, CloudAlly will continue backing it up, even if you deleted it using the "Delete" button.

7. The system will ask you to confirm the delete request. Once you have confirmed, the item will be removed from our system within a few days.




6 Filtering and Viewing Drill-Down Details

This section explains the process of finding the exact backup data you are looking for using filtering.

6.1 Filtering by user

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.

(O Search									8
9 Backups								(+)	Add Bockup Task (
MS Exchange E Microsoft Exchange	lockup 🖉 🦉	Groups/Team Microsoft Group	s de 🦉 📲 . s / Teams	SharePoint & Microsoft SharePo	er	OneDrive / Microsoft OneDray	*	G Google Works Google Workspi	space 🥔 🤞
Succeeded		Succeeded		Succeeded		Succeeded		Succeeded	
Total Mailboxes	12	Total Groups / Teams	19	Total Sites	22	Total Sites	8	Total Users	39
Active Mailboxes	12	Active Groups / Teams	3	Active Sites	2	Active Sites	8	Active Users	39
Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	133.04 GB
Last Snapshot Next Backup	6 hours ago In 18 hours	Last Snapshot Next Backup	4 hours ago In 20 hours	Last Snapshot Next Backup	3 hours ago In 20 hours	Last Snapshot Next Backup	2 hours ago In 20 hours	Last Snapshot Next Backup	11 hours ago In 13 hours
(@ Recovery)	Backup Now	@ Recovery	Backup Now	(Recovery 9 B	I I	(Recovery) (V B	ackup Now]	S Recovery	Backup Now
Google Shared	Drives P @	Salesforce Salesforce	ndbox 🖉 🥚 🥐	box Box	1	Dropbox Business	85 Z 2		
Succeeded		Succeeded		Succeeded		Succeeded			
Total Drives	28			Total Users	11	Total Users / Team folder	s 81		
Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folde	rs 81		
Total Size	2.68 GB	Total Size	24.72 MB	Total Size	97,15 GB	Total Size	103.02 GB		
Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
Next Backup	In 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	In 17 hours		
@ Recovery	Backup Now	G Recovery	Backup Now	G Recovery (4 B	Kkup Now	G Recovery 4 B	ackup Now		

- 2. Click the Box icon from the list or enter a keyword in the Search field to find a specific task. The *Box Backup* page is displayed.
- 3. The *Box Backup* page displays all the Box users available for the administrator account you are using. The page displays the details such as User Name, Email, Status, Backup Size, Last Backup Date, and available Actions. It also provides the means to filter the users and control the associated backup tasks.



6.1.1 Filtering Using Names or Statuses

You can filter using the following options:

- Enter a search phrase in the *Search by* field to view all the users with the entered keyword.
- Filter by statuses such as Not Active, Scheduled, Success, In Process, Failed, Paused, Archived, or Partial.

6.1.2 Filtering Using Tags

CloudAlly provides you with the means to add extra metadata to your backed up data in the form of "tags." For example, you might want to denote all users that belong to Managers, or all those that belong to the Sales Team.

You can use tags to quickly filter your list of users.

The **Tags** option is used to search for existing tags. By default, it is not active. To activate **Tags**:

- 1. Select at least one user.
- 2. Click Tags, and the following screen appears.



3. To search your existing tags, enter a tag name in the Search tags field.

6.1.3 Creating a New Tag

To create a new tag:

1. Click Create New Tag. A pop-up appears where you can enter a new tag name.



Box Backup and Restore User Guide Filtering and Viewing Drill-Down Details

New Tag	
Please enter a new tag name	

2. Enter a new tag name and click **Create.**

To apply tags to your users:

- 1. Select at least one user.
- 2. Click **Tag**.
- 3. Choose the desired tag for your user s.
- 4. Click **Apply**.

6.1.4 Filtering by Tag

In the **Filter by tag** field, enter a tag name. The accounts, teams or sites with those tags will appear.

Homepage	Full MS Exchange Backup Homepage > Full MS Exchange Backup							
joba								٥
© Recovery & Activity	3 of 12 Total Mailboxes Adve Paued Artheid	= (Manger3)			Status	v) (Toga	(C)	+
© Semings	Mallbox	t Email	© Tags	Status 0	Backup Size 💠	Last Backup #	Actions	
	Asata Brown	Agata Brown@ca4software.onmicrosoft.com	Manager		703.74 KB	one day ago	6 6	~
	Bob Smith	bob.smith@ca4software.orimicrosoft.com	(Manager)		6.58 MB	one day ago	6 0	×
	Jacob Anderson	Jacob Anderson@ca4software.onmicrosoft.com	(Manager)		551.02 KB	one day ago	6 0	~

6.1.5 Actions

To perform actions on a user, select at least one of them on the list, and the **Action** button will be enabled. Click **Action** to see the following drop-down menu:





- Activate enables backup in all the selected users.
- **Pause** halts the backup procedures on the selected users.
- Backup now starts the backup immediately. The backup in this case starts as soon as a backup processing machine is available, which may take several minutes.
- Delete removes the backup task and backup data for the selected users.

6.2 Viewing Backup Statistics with the Drill-down Feature

Select the desired user, and click the downward-facing arrow at the end of the row. This option enables you to drill down to the backup history dashboard.

When you drill down, you can find a diagram describing past backups, and a brief summary of the backup outcomes.

lar	nbik				lambik@	cloudrein, com				tanagur)	 Success 	180.	88 MB	one hour ago	Gi 9	^
0	96/10	07/10	anito	osíto	naha	11/10	12/10	13/10	14/10	15 ³ 10	16/10	17/10	18/10	19/10	20/10	
	Box ns: 204 (1)		Succe 20/10/2022 at 05													

The diagram depicts the number of items backed up each day. By hovering your mouse over a column in the diagram, you can see the number of items backed up in each service. This number includes all new and changed items, so it may be greater than the total number of items in the backup. You can select the date range of the chart with the sliders underneath it. The maximum range displayed is 30 days.



The summary tiles below the chart provide at-a-glance information about the backup: for each sub-service, they display the total number of items in the backup, the date of the last backup, and the outcome.



7 Managing Your Account

This section guides you through the processes of managing your Account activity, account settings, password, setting up two-factor authentication, and managing users.

7.1 Viewing Account Activity

The Activity menu enables you to view your account activity, including System Activity and Security Audit. Click *Activity* on the navigation pane.

⊖ Homepage	Activity	
Jobs	System Activity	Security Audit
Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
ک Activity		
දි වි Settings		



7.1.1 System Activity

Click System Activity.

 Homepage	Activity	
Jobs	System Activity	Security Audit
Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
ے Activity		
ැති Settings		

The System Activity page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

_	(Start date · En	d date 🖹 (Activity ~)	(Service ~)	(Status ~)		Q. Search by Tas	k name v) (Q. Search tems. v) (
∎ obs	Activity	Date and Time	Service	Sub Service	Status	Task Name	item
Scovery	Export	jul 12 2022 04:08 PM	30	Calendars	Succeeded	Full MS Exchange Backup / bob.smith@ca	bob.smith@ca4software.onmicrosoft.com
_	Backup	jul 11 2022 01:01 PM		(2)	Succeeded	Sharepoint backup	_/sites/AltaroRestored_Shared_mailbox_20 21_08_31_11_05
8 tivity	Export	jul 11 2022 01:00 PM	8	Channels	Succeeded	Full Teams Backup / AltaroRestored_Lind	AltaroRestored_Linda_Fuller_2021_08_31_0
ø	Restore	Jul 11 2022 01:00 PM	•	10	Succeeded	One Drive / cloudally1-my.sharepoint.co	/2sepo_kazandev_pro
ttings	Backup	jul 11 2022 05:04 AM	30	Calendars	Failed	Full MS Exchange Backup	Mila Scott@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	30	Notes	Succeeded	Full MS Exchange Backup	jacob Anderson@ca4software.onmicrosoft. com
	Backup	Jul 6 2022 05:06 AM	30	Notes	Succeeded	Full MS Exchange Backup	Agata Brown@ca4software.onmicrosoft.co m
	Backup	Jul 6 2022 05:06 AM	95	Notes	Succeeded	Full MS Exchange Backup	Alex.DuglasiBca4software.onmicrosoft.com
	B Backup	Jul 6 2022 05:06 AM	02	Notes	Succeeded	Full MS Exchange Backup	Sarah.johnson@ca4software.onmicrosoft.c



This page enables you to:

- Filter and search the list of backup tasks
- View more details on any backup task. This can be achieved by clicking the "i" (Info) icon. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution.

🕗 Backup	
Execution Time:	Nov 5 2024 11:55 AM
Data Size:	452.70 KB
Number of Records:	51
Description:	Contacts Completed (test-101@cloudiox.com, 51 items, 63.45 KB delta data size, 0 minutes).

 Export the Activity Log as a CSV file. Any filters selected on the page will also apply to the exported log file. For example, you could choose to only see Restore tasks that have failed.

Activity Date and If Restore Service Image: Concelled Task Name Item Image: Restore Jul 12 2020 Export Image: Concelled Image: Conc	Mestore •	Failed Delete Backup Backup		Succeeded Partially Succeedee	đ		Clev
Generative Jul 12 2023 0 Compare Compare	Activity	Date and Restore Ser				Task Name	Item
🕕 Restore jul 12 2023 03:05 PM 🥭 - 🎯 Failed Salesforce Sandbox bob unithipsekioffware	Restore	jul 12 2023 0	>	Cancelled	rd	Salesforce Sandbox	bob.smith@ca4software.ovmicrosoft.com
	Restore	jul 12 2023 03:05 PM	>	8	Failed	Salesforce Sandbox	bob.smith@ca4software.onmicrosoft.com
🕘 Restore May 8 2023 02:54 PM 🗢 - 🎯 Failed Salesforce Sandbox bob with gradual burgers	Restore	May 8 2023 02:54 PM	>	8	Failed	Salesforce Sandbox	bob.smith@ca4software.onmicrosoft.com
Restore Apr 10 2023 01:57 PM Channels S Failed Groups/Teams backup / CA4 Software CA4 Software	Restore	Apr 10 2023 01:57 PM	Char	viels 🛞	Failed	Groups/Teams backup / CA4 Software	CA4 Software
Restore jan 2 2023 03:16 PM O	Restore	Jan 2 2023 03:16 PM	Δ	8	Failed	Google Shared Drives / IADD123	3AD0123

Note: Administrators can grant users permission to see the *System Activity* page by clicking **Settings > User Management**, and checking "View Account Activity."



7.1.2 Security Audit

The *Security Audit* page provides information about all the security-related actions that have happened in your account. The user activity that is displayed includes:

- Backup deleted
- User deactivated
- Settings changed
- Sign-in success or failure
- Permissions changed
- Notifications.

The page includes the date of the event, the type of activity, the service involved, the status of the activity, the account performing the activity, and the description.

O Homepage	Activity Activity > Security audit						
臣)005	Show: From:	Τα:	User Activity: All w	atusi 🚺	Reset		(Export
(G) Recovery	Date	User Activity	Service	Status	Task	Performed By	Description
8 Activity	Seo 11 2023 03:09 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic	Native Sign in (OK) Chrome from in 46 117 234 42.
0	Seo 11 2023 01:57 PM	Sign-in		Completed	bob.am/th@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic	Native Sign in (GK) Chrome from ip 46:117:234.42.
Settings	Sep 11 2023 01:39 PM	Sign-in		Completed	bob smith@ca4software.onmicrosoft.com	bob.smith@ca4software.ormic	Native Sign in (OK) Chrome from ip 46 117 234 42
	5ep 11 2023 12:05 PM	Notification	Google Shared Drives	Completed	Google Shared Drives / 1901january2.0	bob smith@ca4software.onmic	Download Task for drive 1901 January 2.0 has been st
	Sep 11 2023 12:05 PM	Notification	G Google (Email)	Completed	Google Workspace / lapostrophe@cloud	bob.smith@ca4software.onmic	Mail: Download Task for mailbox 'apostrophe@cloudr
	Seo 11 2023 12:04 PM	Sign-in		Completed	bob smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic	Native Sign in (OK) Chrome from is 45:117:234-42
	Sep 11 2023 10 52 AM	Signin		Completed	bob smith@cs4software.onmicrosoft.com	bobamith@ca4software.onmic	Native Sign in (OK) Chrome from in 46.117.234.42.
	Seo 10 2023 02:00 AM	Backup Deleted	Scogle Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark
	Sep 10 2023 02:00 AM	Notification	🙆 Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactive
	Sep 10 2023 02:00 AM	Notification	🙆 Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva
	Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark
	Sep 8 2023 12:00 AM	Backup Deleted	G Google Workspace	Completed	Google Workspace		The backup for the mailbox gakashtest@cloudrein.co
© Support	Sep 8 2023 12:00 AM	Notification	G Google Workspace	Completed	Google Workspace		Backup for the mailbox gakashtest@cloudre 📀 Help

The Security audit table can be exported as a CSV file by clicking **Export**.

Note: Administrators can grant users permission to see the *Security Audit* page by clicking **Settings > User Management**, and checking "View Security Audit Page."



7.2 Managing Your Account Settings

The *Settings* page provides you with tools to control both your account and the accounts of users whose external credentials are linked to your account. The Settings section consists of the following sub-sections:

- Account
- User Management
- Security
- Notifications
- Integrations

You can find more details on each of the *Settings* pages below.

25	Account	User Management	Security	Notifications	Integrations
s /ery	0 _@	80	\bigcirc	4	Ę.
vis	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
ity					

7.2.1 Account Settings

This page allows you to change the name of your account and the email address. You can only change the Data Center Location by contacting CloudAlly support. Finally, this page also allows you to terminate your account.

To update or change your account details:

1. From the Navigation Panel, click **Settings** and then click **Account**. The Settings > Account page is displayed.



O Homepage	Settings Settings > Account	
冒 Jobs	Account Name:	Bob Smith
© Recovery	Email:	bols smith@cs4software.com/crosoft.com
8 Activity	Data Center Location :	Encode province and a prevent of the second of the second of the second of the second and the accessing and the access
() Settings	Partner ID:	
		Save Cancel
	To terminate your	CloudAlly subscription, click on the REMOVE ACCOUNT button.
		r all your data at CloudAlly
	I approve the remove the remov	al of my data from CloudAlly
		Remove Account

You can update the Account Name and/or Email.

Note: If you change your email address, you will receive an email sent to your new address for confirmation. The new address will not become active until it is confirmed.

Click **SAVE**. The following screen will appear. If you did not receive the confirmation email, click **Resend Email Confirmation**

Homepage	Settings Settings > Account				
Recovery	Account Name:	Bob Smith			
Billing	Email:	Bob.smith@ca4software.onmicrosoft.com If you change your email address, we will send an email to y	New Email - Waiting for Approval		Discard
Security		Note: Confirmation was sent to your new	email username@company.com and	is waiting for your approval.	Resend Email Confirmation
کی Settings	Data Center Location:				
					Save Cancel

7.2.2 Canceling Your Subscription

To cancel your subscription:



- 1. Check the box for "I approve the removal of my data from CloudAlly" field and click **REMOVE ACCOUNT**.
- 2. The Are you sure? pop-up window is displayed with a confirmation request.
- 3. Click **YES** to confirm the cancellation.



Note: To prevent mistaken deletions, there is a grace period of 7 days after your account is terminated. After the grace period, if your account is not reactivated, all data from all your backups will be deleted.

7.3 User Management

The page provides tools for fine-level control of the permissions and access levels of your users.

BETA) End User Recovery				
nd User Recovery allows all users in your M	icrosoft domain who ha	ve Exchange backups, to log in with their	Microsoft credentials, access their own	backups, and recover their data.
		•		
e following external credentials a	are currently linked	d to your CloudAlly account		
can remove the credentials anytime if yo	ou prefer to use only y	our CloudAlly sign-in credentials		
				(+) Add new
				Ŭ
Email	Туре	2FA Authentication		
Email Bob.smith@ca4software.onmicrosoft.com	Type Email	2FA Authentication		
			0 0	
Bob.smith@ca4software.onmicrosoft.com	Email	0	0 0 0 0	
Bob.smith@ca4software.onmicrosoft.com Alex.douglas@ca4software.onmicrosoft.com	Email Email	0		Showing 1-3 of 3



7.3.1 Adding a New User

System Administrators, both those who logged in to CloudAlly with a username and password, or with Microsoft credentials, can add new users.

Click + Add new user to create a new user and start the configuration procedure for that user, or the pencil icon to edit an existing user's settings.

- Enter the new user's email address.
- Select the Authentication Type: Azure, Email, Google+, or Okta.
- Select the permissions role for the user. Selecting the role "Administrator" enables permissions to all services and operations. Or, you can selectively choose which permissions to grant from the list of services:

O Homepage	Settings Settings > User Management >	» New user				
105	Email:	Alex.Douglas@onmicrosoft.com	Type:	Email		Υ.]
© Recovery	Password		Role	Custom		÷
8 Activity	~ Operations		- Services			
© Settings		nd manage payment details 🕕		roups / Teams	1	
	View billing notifica View support page View account activi	0	Microsoft Sh Microsoft Or Google Acco	neDrive		
	View security audit Manage Notificatio View backups page	ins	Salesforce Dropbox Bus Box	siness		
	Beccup Tasks Activate new backs		Google Work Google Share			
		. 0				
(C) Support						Q

To save changes, scroll to the bottom of the page and click SAVE.

You will be returned to the Settings page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.

The link is valid for 24 hours. If they did not confirm within this time period, or did not receive the confirmation email, click **Resend Email Confirmation**.



O Homepage	Settings Settings > User Management				
■ Jobs	The following external credentials a You can remove the credentials anytime if yo				
Recovery					
	ition message has been sent to ler@ca4software.onmirosoft.com.	Туре	2FA Authentication		
Follow the new addre	link in the message to confirm the ss. a thirty duralies of ware com	Email	•		
8	jeSica.miller@ca4software.onmirosoft.com	Email	•	00	Resend Email Confirmation
Activity	Sarah.Johnson@ca4software.onmicrosoft.com	Email	۲		
Settings					Page 1 of 1

7.4 Security Settings

The Security Settings page enables you to:

Personal Password Policies	
Change your CloudAlly account password	Change password
You can also use Two-Factor Authentication	Activate 2FA

- Update your password
- Set up two-factor authentication

You can also enforce certain security policies for your users' accounts.

Enforce The Following Password Policies On All Users		
C Enforce Two-Factor Authentication on all users 0		
Password Expiration: Password expires after (days): 90		
		-
	Concel	Sove

- With the **Enforce Two-Factor Authentication** option, you can make two-factor authentication mandatory for all the users in your account.
- By setting the Password Expiration, you can enable the password expiration option for all your users – you will be also be asked for the number of days before the users' passwords expire.



7.4.1 Changing Your Password for Credential-Based Authorization

You can change your existing account password by performing the following procedure:

- 1. From the **Settings** >**Security** page, in the Personal Password Policies panel, click **Change Password**.
- 2. The Change password pop-up is displayed.

Change password	Х
Current Password: New Password:	
Confirm New Password:	SAVE
	SAVE

- 3. Enter the current password in the Current Password field.
- 4. Enter the new password in the *New Password* field.
- 5. Re-enter the new password in the *Confirm New Password* field.
- 6. Click **SAVE**. You can now use this password to access your account.

7.4.2 Two-Factor Authentication

Two-factor authentication provides additional security to your account and your backup data.

To enable two-factor authentication:



1. Click Activate 2FA. The Two-Factor Authentication page is displayed.



- 2. Download an Authenticator app, depending on your platform.
- 3. Open the Authenticator app and add your account by scanning the QR code provided in the web application.
- 4. If you cannot use a QR code, then enter the text code provided in the web application.
- 5. A six-digit code is generated.
- 6. Click NEXT.
- 7. Enter the 6-digit code that the application generated.
- 8. Click **ENABLE** to complete the process of activating the Two-factor authentication.

From now on, every time you sign in to your Account, you are asked to enter a 6digit code from your authentication app, after you click **SIGN IN**. Click **VERIFY** to verify the code and access the application.

7.4.3 SAML

The Security Assertion Markup Language (SAML) is an open federation standard that allows an identity provider (IdP) to authenticate users and then pass an authentication token to another application known as a service provider (SP).

CloudAlly supports Okta as its SAML provider.



There are two steps to setting up Okta so that you can use it to log in to CloudAlly:

- Setting up CloudAlly in the Okta Application
- Setting up Okta in the CloudAlly application

7.4.3.1 Setting up CloudAlly in the Okta Application

 In the Okta application, click Applications > Applications > Browse App Catalog.

okta		Q Search
Dashboard	č	Applications
Directory	ř	· · · · · · · · · · · · · · · · · · ·
Customizations	×	Developer Edition provides a limited number of apps.
Applications	^	Deactivate unused apps or check out our plans page. Contact us to find a plan that is right for your organization.
Applications		Create App Integration Browse App Catalog Assign Users to App More *
Self Service		

In the search bar, enter CloudAlly.



 Click the arrow next to CloudAlly SAML 2.0, and Assign to Users or Assign to Groups.



okta		Q Search			0	88	Bob.smith@ca4	
Dashboard	~							
Directory	÷	Applications						O Helj
Customizations	v	Developer Edition prov	vides a lir	nited number of apps.				
Applications	^	Deactivate unused apps or check out ou	r plans page. Co	intact us to find a plan that is right for your organization.				
Applications		Create App Integration Browse A	pp Catalog	Assign Users to App More *				
Self Service								
Security	~	CloudAlly						
Workflow	v	STATUS	(6 0.040/07	CloudAlly			0	
Reports	~	ACTIVE 5						
Settings	~	INACTIVE 1	Ø	CloudAlly Feature Branch			0	• •
			0	CloudAlly SAML 2.0			0	•
			-			1 /	Assign to Users	
			0	CloudAlly SAML 2.0 DevRein		4.1	Assign to Groups	
			Ô	CloudAlly SAML PROD		0	Deactivate	

Click CloudAlly SAML 2.0, and on the next page, click the **General** tab.

okta		Q Search			Bob.smith@ca4software
Dashboard	v	+ Back to Applica	tions		
Directory	~		CloudAlly		
Customizations	v	COCCOUDAL	Active • 🔒 🗢 View Logs Monitor Imports		
Applications	^	General S	gn On Mobile Import Assignments		
Applications					
Self Service		Assign *	Convert assignments *	People *	REPORTS
Security	~	Filters	Person Type		Recent Unassignments
Workflow	~	People	Bob Smith Bob smith@ca4software.onmicrosoft.com Individual	/ ×	er, Recent Unassignments
Reports		Groups			
Reports	~				SELF SERVICE
Settings	×				You need to enable self service for org managed apps before you can use self service for this app. Go to self service settings

 Scroll down until you see the App Embed Link section. Copy the URL that is displayed - you will need this to set up Okta in the CloudAlly app.



App Embed Link	Edit
Embed Link	
You can use the URL below to sign into CloudAlly SA Okta.	ML 2.0 from a portal or other location outside of
https://Data angle @ alda angle //202450700 ala	udally.com/20_1/0cc2rcfrold2002Tr00y.c
https://Bob.smith@okta.com/home/123456789_clo	
Application Access Error Page	tempts to use an embed link, they will be redirected t
Application Access Error Page	tempts to use an embed link, they will be redirected t
Application Access Error Page If someone who is not assigned to the application at a default error page or one that can be customized. A	tempts to use an embed link, they will be redirected t
Application Access Error Page	tempts to use an embed link, they will be redirected t An application level setting will override default URL

7.4.3.2 Setting Up Okta in the CloudAlly Application

16	C Search				8
	Backups				(+) Add Bockup Task
í	edekops.				(+) waa aackob laak (t
	MS Exchange Backup & @	Groups/Teams & ? Microsoft Groups / Teams	SharePoint / @	OneDrive P Microsoft OneDrive	G Google Workspace a a
	Succeeded	Succeeded	Succeeded	Succeeded	Succeeded
	Total Mailboxes 12	Total Groups / Teams 19	Total Skes 22	Total Sites 8	Total Users 39
	Active Mailboxes 12	Active Groups / Teams 3	Active Sites 2	Active Sites 8	Active Users 39
	Total Size 53.19 MB	Total Size 499.64 KB	Total Size 73.00 MB	Total Size 17.83 MB	Total Size 133.04 GB
	Last Snapshot 6 hours ago	Last Snapshot 4 hours ago	Last Snapshot 3 hours ago	Last Snapshot 2 hours ago	Last Snapshot 11 hours ago
	Next Backup In 18 hours	Next Backup In 20 hours	Next Backup In 20 hours	Next Backup In 20 hours	Next Backup In 13 hours
	Recovery (Backup Now)	S Recovery Backup Now I	S Recovery (Backup Now) I	Recovery Backup Now I	G Recovery (Stackup Now)
	Google Shared Drives @	Salesforce Sandbox @	box Box	Cropbox Business	
	Succeeded	Succeeded	Succeeded	Succeeded	
	Total Drives 28		Total Users 11	Total Users / Team folders 81	
	Active Drives 28	Total Seats 4	Active Users 11	Active Users / Team folders 81	
	Total Size 2.68 G8	Total Size 24.72 MB	Total Size 97.15 GB	Total Size 103.02 GB	
	Last Snapshot 9 hours ago	Last Snapshot 14 days ago	Last Snapshot 12 hours ago	Last Snapshot 7 hours ago	
	Next Backup In 15 hours	Next Backup In 4 hours	Next Backup In 12 hours	Next Backup In 17 hours	
	Secovery Backup Now	Recovery Seckup Now	Recovery (Backup Now E	Recovery (Backup Now E	

1. From the Homepage, click **Settings** in the Navigation panel.



2. On the Settings page, click **Security**.

 Нотераде	Settings				
⊒ Jobs	Account	User Management	Security	Notifications	Integrations
G Recovery	0	8	\bigcirc	4	¢;
D Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
8 Activity					
© Settings					

3. Click the **SAML** tab.

 Homepage	Settings Settings > Security		
Jobs	Password	IP Restrictions	SAML

4. Paste the URL that you copied from the Okta site.

O Homepage	Settings Settings > Security	Email & Password: Activ
)obi	Password IP Restrictions SAML	
Recovery Recovery Activity	SAML provider Sc Disa Idensity Provider Metadata File Please upload SAML metadata XML file generated by Disa	
⊗ Settings	Upload URL http://Bob.mith@ekta.com/home/123456789_cloudally:am20_1/Cosi2refpeld3092Tr09va URL to the SAML Identity Provider Metadata Ile.	
	Upload File C. Choose file No file choises.	
		Activate



- 5. Click Activate.
- 6. Read the "Are you sure you want to activate SAML Authentication with Okta" message in the next window, and click **Confirm**.



After clicking **Confirm**, the Activate state changes from **Email & Password: Active** to **SAML: Active.**

Email & Decouverds Active	
Email & Password: Active	SAML: Active

7.4.4 IP Restrictions

Need fine-grained access control of your endpoints? You can restrict access to the Portal based on the users' IP addresses. This is especially helpful to enforce security policies and prevent unauthorized access by limiting backup/restore requests to company-approved IP addresses, such as an office IP, or a particular VPN.

Setting Up IP Restrictions

To enable IP restrictions in your account, first create the list of trusted IP addresses.

IMPORTANT!



It is strongly recommended to use this feature only if you have a static IP address, to prevent users from being locked out.

1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.

3		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out
O Homepage	Settings Settings > Security	Email & Password: Active
jobs	Possword IP Restrictions SAML	
(G) Recovery	IP Address Restrictions Settings	Your IP Address: 79.182.47.197
8 Activity	IP Address restrictions allow you to control who can access your account based on their IP address. Once you configure a set of trusted IP addresses and enable IP Address restrictions, any user attempting to log in via an IP address that is not trusted will be block You can define a single IP address or a range of IP addresses. Only IPA IA accepted.	ed.
© Settings	CAUTION: Make sure to add your own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being locked out of your account.	
	Trusted IP Addresses	+ Add IP Address
	IP Description IP Address	Actions
(C) Support		() Неір

- 2. Click + Add IP Address.
- 3. Enter one or more IP addresses:
 - a. Enter individual addresses separated by commas, and an optional description.

Au	d New IP Add	aress	Your IP Address: 130.248.112.29		
Ente	er IP Address desc	ription	(optional)		
e.g	g. Office				
You	ı can add one or n	nore IP addresses, or a rai	nge of IP addresses:		
۲	Trusted IP Addre	ss(es)			
	Separate multiple IF	addresses with ",".			
	Example 192.168.10).5			
	Trusted IP Addre	ss Range			
	From	То			
	Example 192.168.10	0.0 - 192.168.10.255			
			Cancel Save		



b. Or, enter a one or more ranges of contiguous addresses, and an optional description. Multiple ranges could be used to accommodate VPN and internal networks.

Add New IP Address	Your IP Address: 79.181.255.0
Enter IP Address description	(optional)
Secondary office	
You can add one or more IP addresses, or a range of IP	addresses:
Trusted IP Address(es)	
Separate multiple IP addresses with ",".	
Example 192.168.10.5	
Trusted IP Address Range	
From To	
79.181.255.0 - 79.181.255.16	
Example 192.168.10.0 - 192.168.10.255	
	Cancel Save

4. Once you enter at least one address, the **Trusted IP Addresses** toggle will be turned on. You can always return to disable IP restrictions later on.

abylix	Security Settings Settings > Security		Email & Password: Active
S) overy	Password SAM	IP Restrictions	
3	IP Address Restrictio	ns Settings	Your IP Address: 130.248,112.29
8 surity	Once you have configure a se	you to control who can access your account based on their IP address. If of musted IP addresses and enable IP Address restrictions, any user attempting to log in via an IP address that is not trusted w frees or a range of P addresses. Driv JP whi is accepted.	ill be blocked.
eryes.	CAUTION: Make sure to add yo	ur own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being looked out of your account.	
	Trusted IP Addresses		+ Add IP Addre
	IP Description	1P Address	Actions
	Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	00
8			

You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.



Note: If you forget to include your own IP address on the trusted list, IP restrictions cannot be enabled.

Your CloudAlly account is now protected from access by users who are not on your list.

Blocking Access

If a user tries to access your CloudAlly account from an untrusted IP address, the following "access denied" error message will appear:

	Home Pres Trial
Sign In to your Account Don't have an account? Sign up	
bob.smith@ca4software.onmicrosoft.com	
	ø
Targat you, panentat. Access denied.	
G Sign in with Google	
Sign in with Microsoft	
O Sign in with Okta	
Terms of Service and Privacy Statement	
powered by aws	



7.4.5 Email Notifications

Whenever you enable or disable IP restrictions, or modify the addresses, CloudAlly will send you an email notification, letting you know what has changed.



7.5 Notifications Settings

This menu option enables you to manage your system notifications. From the Navigation Panel, click **Settings** > **Notifications**.

 Homepage	Settings				
≣ sdol	Account	User Management	Security	Notifications	Integrations
G Recovery	0	00 ()//	\bigcirc	\bigtriangleup	<
C) Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
& Activity					
© Settings					



The following screen will appear:

ummary Report							
Report Format:							
Backup tasks overview	Preview			Report Frequency:			
O Backup failure details	Preview			Once A Day			
Provide as:							
O CSV Attachment				Send the report only in ca	se of backup failure		
							SAVE
d Notifications To:						(+) A	SAVE
nd Notifications To:	Display Name	Summary Report	Recovery (i) Notification	Exceptions () Notification	Auto Discovery () Notification	+ A Smart Alerts ①	SAVE add new recip Action

The top of the screen enables you to configure the following options:

- Report Format: Backup tasks overview vs. backup failure details
- CSV Attachment vs. Download Link
- Report Frequency: daily, weekly or monthly
- Send the report only in case of backup failure

To set up a new recipient:

- 1. Click + Add new recipient.
- 2. Enter the Email of the recipient and the Display name. The Display name is used in the report email to address the recipient.
- 3. Select the desired notification types:
 - a. Summary Report
 - b. Recovery Notification
 - c. Exceptions Notification This notification is sent both when there are backup errors and integration errors. (For integration information, see "Managing Your Account" on page 41.)



Note: If no one is configured to receive Exception Notifications, then they will be sent to the Primary account user.

- d. Auto Discovery Notification
- e. Smart Alerts
- 4. Click **SAVE** to create the new recipient.

Settings Settings > Notifications > No	ew Email report				
User Info Email			Display Name		
Notifications	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts	
					SAVE Cancel

7.6 Integrations

The Integrations page displays all of the available integrations to external services and systems, with an option to connect either as a self-service, or by calling Support and providing additional details. The page also includes details about the REST API integration with an option to generate API tokens.

The following types of integrations may be configured on this screen:

- SIEM (Security Information and Event Management)
- RMM (Remote Monitoring and Management /PSA (Professional Services Automation)
- API enables integrating with the CloudAlly REST API.

7.6.1 Splunk

The first available SIEM integration is with Splunk, using the Splunk HTTP Event Collector (HEC).

Versions Supported:



7.6.2 Which Events are Sent to Splunk?

You can choose to send one or more of the following to Splunk:

Note: CloudAlly sends events to Splunk periodically, approximately every 10 minutes.

- Customers' activity events, such as backups and restores
- Customers' Security Audit logs (see " Security Audit" on page 44)

7.6.3 Pre-requisite: Setting Up Your Splunk Account

Before you can connect your backup account to Splunk, you first need to establish an account with Splunk and configure the Splunk HTTP Event Collector.

Perform the following steps in the Splunk Admin Console.

1. Navigate to Settings>Data Inputs>HTTP Event Collector.

splunk-enterprise	Acquis =	Or or ben yer	r • 🕘 Messages •	Settings + Activity •	• Hup • Find
Data inputs					
et op data inputs hom Net	and directories, network ports, and scripted inputs. If you want to set up forwarding				
	Local inputs				
	Type		Ingliadra	Actions	
	Files & Directories Index a local file or manifor an entire directory.		10	+ Add new	
	HTTP Event Colector		-	+ Add new	

- 2. Under the Global Settings option:
 - a. Enable the HTTP Event Collector by setting All Tokens to **Enabled**.
 - b. Choose **json** as default source type.
 - c. Check Enable SSL.



Edit Global Setting	5				×
All Tokens		Enabled		Disabled	
Default Source Type			_json 💌		
Default Index			Default 👻		
Default Output Group			None 🕶		
Use Deployment Server					
Enable SSL					
HTTP Port Number ?	8088				
				Cancel	Save

3. Under the New Token option, create a new token and copy the value - it will be used in the CloudAlly Portal.

Name	Splunk Token	
Source name override ?	optional	
Description ?	optional	
Output Group (optional)	None 💌	

IMPORTANT NOTE: Do NOT check "Enable indexer Acknowledgment".

4. Find Your HEC URL.



The standard form for the HEC URL varies, depending on the Splunk software type you have. Find the standard form on this page: <u>Set up and use HTTP Event</u> <u>Collector in Splunk Web</u>.

5. Verify that you have set up an SSL certificate issued by a commonly accepted certificate authority (CA) on the Splunk HEC endpoint.

7.6.4 Setting Up Splunk in the Portal

- 1. From the navigation pane, click **Settings > SIEM**.
- 2. Click **Splunk > Connect**. Complete the fields on the following screen:
 - a. Enter the Splunk HTTP Event Collector URL.
 - b. Paste the token value that you copied into the Splunk Token field.
 - c. Optional: Add the Event Source, which is the override value to assign to the event data.

Splunk SIEM Integration	③ Splunk HEC Setup
Splunk HTTP Event Collector URL(HEC)*	
Please verify Splunk SSL Certificate.	
https://splunk.company.com:8088/servi	ices/collector/event
Splunk Token*	
123456789-abcd-efgh-1u2j3k4l5m6n	
Event Source (Optional)	
Enter your event source	
Send Activity Events	
Send Audit Log	
	Cancel Save

3. By default, there are 2 options at the bottom that are selected. You can deselect any that are not relevant for you:



- a. Send customer activity events
- b. Send customer audit log
- 4. Click **Save**. The Splunk tile will now be Active.
- 5. To delete the integration, click **Edit > Delete**.



7.6.5 RMM/PSA

The RMM (Remote Monitoring and Management) and PSA (Professional Services Automation) page enables you to connect to Autotask.





Autotask is a PSA platform that provides complete visibility over your business with features like dashboards, sales, CRM, assets, inventory, and billing.

Once you have set up your account with <u>Autotask</u>, open a support ticket. Send us:

- Your Autotask ID
- Your Autotask Password
- The email address you'd like your reports to be sent to.

Once the support representative has enabled Autotask, we will send any backup task failure reports to the email address provided, starting from the next backup cycle.

7.6.6 API

The third option on the Integrations page enables you to connect to the CloudAlly API.

CloudAlly has a robust API, that enables you to perform billing management, backup, restore, and download management, Partner Portal management, and user management functions. It enables you to automate processes and integrate with the CloudAlly solution. The API can be used for many common business scenarios, such as exporting the data of customers who leave your company as part of the off-boarding process.

The REST API screen will be blank if you have never created an API key. If you have created one in the past, you will see it on the screen.



Note: The Created On Date is not available for client IDs created prior to CloudAlly release 24.4.1.



The first step towards integrating with our API is generating your own Client ID and Client Secret for authentication. Click **+Create key**. The Client ID and Client Secret will be generated, so that you can copy them for use in the headers of your API calls.

	py the "Client Secret" before you click on Clo t, you will not be able to see it again and will h	
Client ID	12345-67890-abcde-fghij	D
Client Secret	*****	0]

IMPORTANT! Ensure that you copy the "Client Secret" before you click Close. If you do not copy it, you will not be able to see it again and will have to create a new one.



ettings > Inte	grations						
SIEM	RMM/PSA	API					
REST AF	21	10 2					
Integrate			user management	functions with our accessible AF	1. Customers who wish to use ou	ir API can create their own API ke	y - Client
Integrate ID and Cli	ent Secret - for auther	ntication.		functions with our accessible Af		ir API can create their own API ke	y - Client
Integrate ID and Cli Refer to ti	ent Secret - for auther ne <u>API Documentatio</u>	ntication.					
Integrate ID and Cli	ent Secret - for auther ne <u>API Documentatio</u>	ntication.					y - Client Create ke

If you need to delete your API key, click the trash icon.

7.6.7 Next Steps

Once you have generated an API key, the next step is to call the Authentication API using the Client ID and the Client Secret.

For each user, you need to create a unique access token and refresh token.

The complete list of CloudAlly API calls can be found <u>here</u>.



8 Managing Subscriptions and Payments

8.1 Subscribing to CloudAlly

Once the trial period has ended, you need to subscribe to CloudAlly to access and manage your backups, otherwise your backed up data will be deleted.

To subscribe to a plan:

1. Click the **Subscribe** link displayed in your account. Alternatively, you can click the **Billing** option of the Navigation Panel.

The *Review Billing* page is displayed with the option to select either **MONTHLY** or **ANNUAL** billing options.

Note: You can subscribe before the end of the trial period, and the payment period will start after the trial period is over.

2. Click **MONTHLY** or **ANNUAL**, depending on your preference.

You are redirected to the *Payment Details* page. Fill in the billing and credit card details to finish the subscription process. Refer to <u>Payment Details</u> for more information.

8.1.1 Monthly Subscriptions

When you subscribe to a monthly plan, the credit card that you registered in the *Billing > Payment Details* page will be charged the amount that you owe.

CloudAlly's billing is handled by a PCI-compliant payment processor.

To finalize your subscription, enter your credit card details and general billing information, and then click **Subscribe**.

The initial payment will be charged at the end of your 2-week trial period.

A receipt will be emailed to you each month after you are charged.

If CloudAlly is unable to charge your credit card (e.g., because it has expired), you will be notified by email. Additionally, a message will appear in the application that



you need to go to the *Billing Status* page so you can review your billing details, and then update your credit card information if necessary.

Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact support@cloudally.com.

	DALLY Cloud to Cloud Backup	A Payment Failed; Unsble to charge your credit card.	Updated on Nov 07, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 🗗
And Homepage	Billing Billing > Status			

Note: The monthly payments are processed automatically once you provide the required information in the Payment Details section, and it has been verified that your credit card is valid. To disable automatic payment processing, please contact CloudAlly support. Instead, you will start receiving monthly invoices for the payments.

8.1.2 Annual Subscriptions

When you subscribe to an annual plan, you will receive a confirmation message that your request has been submitted, and then CloudAlly support will send you an email, asking that you confirm your annual subscription request.

Once you have confirmed, CloudAlly will email an invoice to you, payable in 30 days by credit card, PayPal, or bank transfer.

After the initial payment, CloudAlly will send you an invoice 30 days before your payment is due, in 11 months. You will also be reminded that your annual subscription is due online:

Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact support@cloudally.com.

CLO		Cloud to Cloud Backup	Reminder: Please pay your annual subscription.	Contend on Non-06, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 🖯
O Homepage	Billing Billing > St	latus			


Should you fail to make your annual payment, you will be reminded with a message like this:



After you finalize your subscription, the *Billing > Payment Details* page displays additional billing management options and provides a brief summary of the payment information for the current period and the next payment date.

8.2 Payment Details

Homepage	Billing Annual subscription, Renewal Date: Aug	18th 2022	
Jobs	Status	History	Payment Details
Recovery	(5)	<i>(</i> ;;;	
Billing		C	
<u>م</u> Activity	Billing status of clients		Change your payment details
දි හි Settings			

The Payment Details page contains the information used for billing.

8.2.1 Monthly Subscriptions

If you have chosen a monthly payment plan, you can update your credit card and billing details here:



Credit Card Details					
Card Number:	CREDIT: X000-X000-X000-1111 (12/2023)				
				ADD NEW CA	ACTIVATE CARD Delete card
Billing Details					
Currency:	Eur		Tide:	Mr	
First Name:	Bob		* Last Name:	Smith	
Billing Email:	bob.smith@ca4software.onmicrosoft.com		Company Tax Id:	12345	
Company Name:	12345		* Address Line 1:	123 Main Street	
Address Line 2:			Address Line 3:		
Country:	United Kingdom	<i>u</i> .	State:		
City:	Anytown		* Zip Code/Postal Code:	12345	
Phone number:	2011234567		Email Invoice/Receipt:	Link Attachment	
Payment Day:	4				

8.2.1.1 Add New Card

The **ADD NEW CARD** option enables you to define your card information for a monthly subscription payment.

Billing							
Billing >> Pa	ayment details						
Monthly su	bscription, next	t payment: Dec 13th 2020					
~ Cre	dit Card Det	tails					
Card	Number:	undefined: XXXX-XXXX-XXX	(X-444 V				
					ADD NEW CARD	ACTIVATE CAR	Delete card
~ Add	new card o	details					
Card H	older's Name:	Card Holder's Name:					
Card N	umber:	Card Number	MM / YY	CVV			
							ADD NEW CARD

To create a new payment method:



- 1. Click ADD NEW CARD.
- 2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
- 3. Click ADD NEW CARD.

The new card information is saved and activated, and you can use this card.

8.2.1.2 Change Payment Method

To change your existing payment method:

- 1. Click the drop-down list and select the payment method from the Cards Number drop-down list.
- 2. Click the payment method from the list (the screen shot below depicts choosing a different credit card).
- 3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.

Billing Billing >> Payment details	-	
Monthly subscription, ne	xt payment: Dec 7th 2020	
~ Credit Card De	etails	
Card Number:	CREDIT: XXXX-XXXX-XXXX-5048 (1 🗸	
	CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)	
	CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)	ADD NEW CARD ACTIVATE CARD Delete card

The details section displays billing information such as Currency, Title, Name, and Billing email.

4. Below, there are more fields in the Billing details section. The Company Tax ID field indicates your company tax ID. (This is mandatory for Israeli companies.)



Note: Due to Value-added tax (VAT), Israeli companies must include their Tax ID. Therefore, the Company Tax ID field is mandatory for Israel, and if this field is not completed, our company will not be able to provide you with backup services.

[*] Currency:	USD	Title:	~
* First Name:		* Last Name:	
* Billing Email:		Company Tax Id:	
* Company Name:		*Address Line 1:	
Address Line 2:		Address Line 3:	
* Country:	~	State:	
* City:		* Zip Code/Postal Code:	
* Phone number:		Email Invoice/Receipt:	🔵 Link 💿 Attachment

- 5. Update the required fields. The fields marked with the * symbol are mandatory.
- 6. Click **UPDATE BILLING DETAILS**.
- 7. The updates are saved.

You can choose whether you want to receive the Invoices or Receipts as a link or as an attachment to the email.

Note: You can change the billing currency by contacting CloudAlly support.



8.2.2 Annual Subscriptions

If you have chosen an annual payment plan, you can update your billing details here. When you are done, click **SAVE**.

Homepage	Billing Billing > AnnualSubscription		
≘	Annual subscription, Renewal Date: Oct 19th 2023		
Jobs	~ Billing Details		
Recovery	Subscription Starting Date:	November 3, 2022	
0	Currency:		
Billing	* Country;	United States	÷
8 Activity	* State:	New York	v
0	* City:	New York	
Settings	* Zip Code/Postal Code:	01234	
	* Company Name:	Pizza Perfecto	
	Company Tax Id:	987654321	
	* Company Address:	14652 Broadway	
	Purchase Order Number (Optional):	4350123	
	 Billing contact 		
	* First Name:	Bob	
	*Last Name:	Smith	
© Support	* Billing Email:	Bob.smith@ca4software.onmicrosoft.com	() Help

8.3 Billing Status

Annual Subscription

When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.

Homepage	Billing Billing > Status						
)obs	Note: The billing statu	s is usually updated within	a few minutes after the pa	yment is complete. If the status has not updated aft	er 24 hours, please contact support.		
6) Recovery	Subscription Annual	Payments status Paid	Next renewal date Sep 12, 2023	Forecast for next payment \$226.80			
Billing & Activity	Payment Forecast						
	Service	Total Qu	antity	Billable Quantity	Unit Price	Total Amount	
(C) lettings	MS Exchange (365)	é malibo	oes.	6 mailboxes	\$37.80	\$226.80	

When your subscription amount becomes due, the Billing Status page displays the following information:



- Issue date the date the invoice was issued
- Status Paid, Due or Overdue
- Due Date the date by which the invoice must be paid.
- Effective Date the date the subscription period begins.
- Total Amount amount owed.
- Download Invoice Click this to download a PDF copy of your invoice.
- **Email Invoice** Click this to send an invoice to your email address.
- **Pay Invoice** Click this to directly pay the amount owed online.

C CL		e Overdue: Please pay your annual subsc	ription.	Updated on: Ma	v 03. 2023		?	Bob Smith 🗸
() Homepage	Billing Billing > Status							
雪 Jobs	Note: The billing statu	is is usually updated within a few minu	tes after the payment is comp	lete. If the status has not upd	ated after 24 hours, please contact	support.		
© Recovery	Subscription Annual	Payments status Amount Due \$253.00						
Billing & Activity	Overdue Invoices							
	Issue Date	Status	Due Date	Effective Date	Total Amount	Download Invoice	Email Invoice	
© Settings	Mar 18, 2023	Overdue	Apr 17, 2023	Apr 18, 2023	\$253.00	41197 ±	(8)	Pay Invoice 🛛 🔘

You can click **Pay Invoice**, and you will be directed to the following screen, where you can pay your invoice via PayPal or by credit card:



		Choose payment method
		Pay With 🗭 PayPal
CloudAlly		On the Paypal page, you can also pay
		by credit, without the need for a user account
bob.sm	ith@ca4software.com, 1	0.000.000
year b	ackup starting September	
28, 202	22, HR MS 365 Bundle Plan -	
Compr	ehensive Microsoft 365	
Backu	p Billed Per User	
Buyer	bob.smith@ca4software.com	
Due date	Apr 17, 2023	
Total	\$1,890.00	
business and	ireen Invoice is not part of the interaction between the its customers, and is not liable for the goods & services e business, and/or the business' use of the customer's	

Monthly

Similarly, if there was a problem with your monthly subscription payment, the status will look as follows:

	OUDALLY Cloud to C	Cloud Backup	ur credit card.	Updated prc Nov 07, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out
Homepage Jobs	Billing Billing > Status				
(S) Recovery	Note: The billing status	is updated once a day. If you made any recent payments i	t will be reflected in the next 24 hours.		
Balling	Subscription Monthly	Payments status Amount Due \$51.52			Update credit card details
8 Activity Sectings	Unpaid Bills				
	Jun 20, 2022	Due Date Jun 20, 2022	Effective Date	Total Amount \$12.88	
	May 20, 2022	May 20, 2022	Jun 1, 2022	\$12.88	
	Apr 20, 2022	Apr 20, 2022	Mar 1, 2022	\$12.88	
	Mar 20, 2022	Mar 20, 2022	Apr 1, 2022	\$12.88	

From here, click **Update credit card details** and provide the new information.



8.4 History

This page displays the history of payments.

illing				
illing >> History				
Nonthly subscription, next payment	: Dec 13th 2020			
Reference Number	Issue Date	Due Date	Amount	
68277 💭	November 13, 2020	November 13, 2020	\$143,45	
67599 <i>C</i>	October 13, 2020	October 13, 2020	\$44.65	
67134 🕢	September 13, 2020	September 13, 2020	\$49.40	
66837 🖧	August 13, 2020	August 15, 2020	\$44.65	
		Page 1 of 1		Showing 1-4 of 4

By clicking on the reference number, you can download the receipt, which provides details about the number of backed-up accounts or the amount of stored data, and the total amount paid. It also displays the payment method used.

An example of a receipt is displayed below.



To: pizza-pe	rfecto.com – PPV001	CloudAlly Ltd.	
Pizza Perfecto 18 Mozarella L United Kingdo		Tax ID: 514596667 12 Harimon st., Gan H Israel www.cloudally.com accounting@cloudal	
Invoic Certified Copy	e / Receipt 51646	26 Apr 2021	
	Receipt for admin@pizza-perfecto.com, 1 yea	ar backup starting April 2. Prico	2, 2021, GBP Total
70	Dropbox 696.56 GB	16.25 GBP	1,137.50 GBP
		Subtotal	1,137.50 GBP
		VAT 0%	0.00 GBP
		Total payable	1,137.50 GBP
Payments D	etails		
Туре	Description	Date	Amount
PayPal	Account 12345678 / Transaction # 987654321	26 April 2021	1,137.50 GBP
		Tota	1,137,50 GBF
Paid with P	accipt for Proforma Invoice 11392 ayPal cccount: KQMTW2PHR5CUG		



8.5 Billing Notification Messages

Administrators can define whether individual users will see the Billing Notification Messages on their screens (e.g., Payment Due, Payment Overdue, Payment Failed).

To turn notifications on or off:

- 1. From the Navigation Panel, click **Settings > User Management**.
- For an existing user, click the pencil icon next to the user's name.
 For a new user, the notification options will appear when you define the new user's details.
- 3. Click View billing notification messages on or off.

omepage	Settings > User Management > New user						
≣ Jobs	Email:	bob.smith@ca4software.onmicrosoft.com	Type:	Email			
(S) Recovery	Password	*****	Role	Custom			
Billing	· Operations		~ Services				
& Activity	General						
	View Account setting page 💿		Microsoft Exchange				
	View billing page and manage payment details 🕚		Microsoft Groups / Teams				
0	View billing notification messages		Microsoft SharePoint				
ettings	View support page 📵		Microsoft OneDrive				
	View account activity 🚯		Google Account				
	Show all your support tickets		Salesforce				
	Manage Notifications		Dropbox Business				
	View backups page 💿		Box				
			Google Workspace				
	🔄 Attivate new backup tasks. 💿		Google Shared Drives				
	Modify backup tasks 😝 👘		IMAP				
	Delete backup tasks 🕐						



9 Helpful Resources

9.1 About CloudAlly

Founded in 2011 as one of the world's first cloud-to-cloud backup services for Google Apps and Salesforce, CloudAlly led the industry with the first commercially available Microsoft cloud backup in Q1 2014. ISO 27001 and HIPAA certified CloudAlly adheres to industry-standard best practices for information security management, including EU-GDPR compliance.

9.2 Knowledge Base

Search through articles in our Knowledge Base at <u>https://support.cloudally.com</u> to find answers to the most common user questions.

9.3 Support

Support - If you have any question or need further help, do not hesitate to contact us via email at <u>support@cloudally.com</u>. or visit our customer support hub: <u>https://support.cloudally.com</u>

9.4 Privacy

CloudAlly takes privacy seriously. Read our Privacy Policy at <u>https://www.cloudally.com/privacy-policy</u>

9.5 Security

CloudAlly provides a secure online backup solution with internationally recognized accreditation for information security management. Read how we protect your data at https://www.cloudally.com/resources/secure-saas-backup/



10 Support Pages

The Support option at the bottom of the Navigation Panel redirects you to our support hub. In the support hub, you can find articles covering some of the most common questions and providing instructions.

	← Back to CloudAlly	Free Trial Open a Ticket	Sign in Partner Sign in
н	ow can we help?		
Search this help center		Q	
1) Office 365 🥠 box	SharePoint 👄 OneDrive	G Suite	
	e to help you n is available 24 hrs 365 Day		

CloudAlly provides multi-channel support options:

Phone Numbers:

USA: +1 (424) 304-1959 AU: +61 2 8599 2233 UK: +44 114 303 2758

Email Addresses:

General Inquiries: <u>Info@cloudally.com</u> Customer Support: <u>Support@cloudally.com</u> Sales: <u>Sales@cloudally.com</u>

Open a ticket and the support team will contact you to help you with any question or problem.





Browse the articles, instructions, and tutorials in the Help Topics section. These materials are especially useful for new users as they explain the settings and procedures of backup activation, management, and recovery.



