

User Guide

Microsoft 365:

Exchange, OneDrive, Sharepoint, Teams & Groups

Backup and Recovery



Microsoft 365

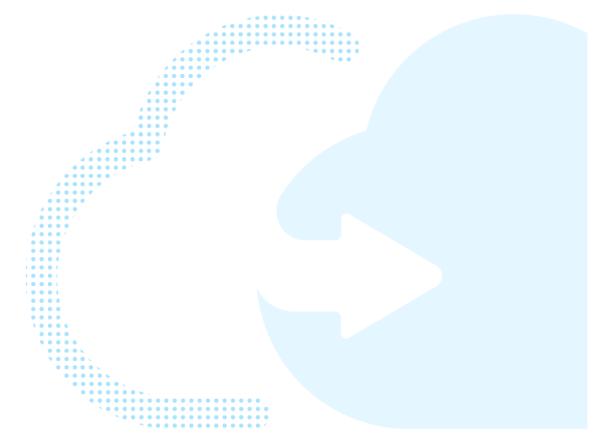


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1 Preface

1.1 About this Guide

Thank you for selecting CloudAlly Backup for Microsoft 365. Relax! All your Microsoft 365 data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your Microsoft 365 Exchange, OneDrive, Sharepoint, and Teams & Groups 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 Backup 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 Backup for Microsoft 365.

1.3 What's in this Guide

This guide is organized to help you find the information you need to manage CloudAlly Backup for Microsoft 365. It is divided into functional parts intended to support you as you manage your environment:

- Creating and Accessing Your CloudAlly Account
- Backing Up Your MS 365 Data
- <u>Recovering Your Backed Up Data</u>
- Filtering and Viewing Drill-Down Details
- Managing Your Account
- Managing Subscriptions and Payments



2 Creating and Accessing Your CloudAlly Account

- Microsoft license
- Global Administrator account in Microsoft Office online version

2.1 Sign Up/Sign In from the CloudAlly Home Page

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

CLOUDALLY an opentext company		Free Trial
	Sign In to your Account	
	Email Password Fond you assessed	
	Sign In	
	G Sign In with Google Sign In with Microsoft	
	Sign In with Okta	
	Terms of Service and Privacy Statement	
	powered by aws	

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



LOUDALLY at company	÷I
Comprehensive. Proven. Secure. Enterprise-grade automated backup and recovery.	Sign up for a 14 Day Free Trial
Protect your Cloud Data for FREE with CloudAlly	First Name Last Name
14 Day Free Trial	Email
 5 Minutes Setup No Credit Card Required 	Password Ø Confirm Password Ø
Get proven and secure data protection with the Pioneers of SaaS backup.	EU (Ireland)
	Sign up
\sim \sim \sim \sim	or
	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 Policy</u> . We'll occasionally send you account related emails.
	powered by aws

- 4. Complete the form, and then click Sign up.
 - **Note:** CloudAlly Backup gives you the choice of 7 AWS data centers available in the dropdown menu "Location." These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, 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 CloudAlly Account.

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



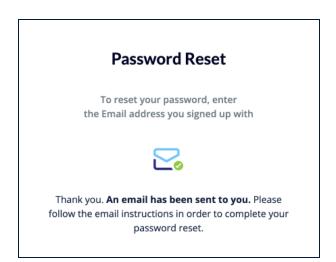
2.2 Resetting Your Password

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

1. Click **Forgot Password?** to start the process of resetting your password. The *Password Reset* page will appear.

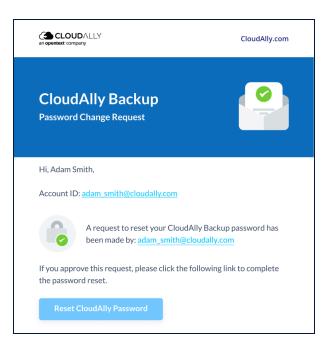
Passwo	ord Reset
	password, enter s you signed up with
Email	
R	Reset
Sign in	Sign u

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





The email will look as follows:



4. Click **Reset CloudAlly Password** to confirm the password reset, and the *Change Your Password* window will appear.

Change Your Password	
Fill-in the new password	
New Password	ø
Confirm New Password	Ø
Save	
Cancel	

5. 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 CloudAlly Account*.



3 Backing Up Your Microsoft 365 Data

Microsoft 365 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 automated daily Microsoft 365 backup service ensures that you can both quickly recover data from any point in time as well as export your archives for local storage.

CloudAlly's Microsoft 365 service backs up data from:

- Mail, Calendar, Contacts, Tasks and Notes (Microsoft Exchange)
- Conversations, Sites, Calendars and Channels (Microsoft Teams and Groups)
- All of your sites, files, and libraries (Microsoft OneDrive and Microsoft SharePoint)

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

3.1 Microsoft 365 Exchange

3.1.1 Creating a New Backup Task

To create a new CloudAlly 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.



3		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
omepage	Homepage	
=	Q Search	8 🖨
Jobs	4 Backups	+ Add Bockup Task
Activity		Total Active Total Size Last Snapshot Next Backup Stream 12 12 14.81 MB 89 days ago In 12 hours Stream Frequence
(i) ettings	Groups/Teams Backup ℓ ℓ Groups/Teams Gucceeded	Total () Active () Total Size Last Snapshot Next Backup 9 8 390.41 KB 22 days ago In 9 hours Image: Snapshot
	e Sharepoint Backup & Microsoft SharePoint Succeeded	Total ● Active ● Total Size Last Snapshot Next Backup 12 11 115.06 MB 22 days ago In 8 hours
	P ConeDrive Backup P Microsoft OneDrive Succeeded	Total ① Active ① Total Size Last Snapshot Next Backup 8 12.09 MB 22 days ago In 14 hours
0		(О) Нефр

The Activate A New Backup page is displayed:

٩	Bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out					
 Homepage	Homepage > New					
Jobs	Activate A New Backup		$\ensuremath{\bigcirc}$ You will be directed to your account for authentication			
Recovery	Microsoft Exchange	Including: Mail, Calendar, Contacts and Tasks				
	ा 😤 Microsoft Groups / Teams	Including: Conversation, Calendar, Sites, Apps, Channels, Metadata				
Activity	Microsoft SharePoint	Including: Sites documents and Libraries				
🔅 Settings	Microsoft OneDrive	Including: Personal sites documents and Libraries				
	Google Workspace	Including: Mail, Calendar, Contacts, Drive and Tasks				
	Google Shared Drives	Including: Files and Folders				
	Salesforce	Including: Organization data and Chatter				
	box Box	Including: Files and Folders				
	Stopbox	Including: Files and Folders				
	Google Account	Including: Mail, Calendar, Contacts, Drive and Tasks				
	IMAP	Including: Mail				
(2) Support			⑦ Help			

3. Click the name of the service you would like to back up.



Backing	Up Your	Microsoft 3	365 Data
---------	---------	-------------	----------

Enter your admin details	
* Backup Name	
Enter your backup name	
Use OAuth based authorization	 Use credential based authorization
Please note that our authorization process uses OAu	th and requires a Global Admin account.
Cancel	Authenticate

- 1. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
- 2. You will see the OAuth based authorization Click Authenticate to start the process of granting the access token. You will be redirected to the Microsoft sign-in page. Enter Global Admin credentials to sign in to your Microsoft account.

IMPORTANT!

The user that you enter **must** have Global Admin permissions.

"Use credential-based authorization" is not active by default, and we Note: don't recommend it. If you would like to use this, contact CloudAlly support.

3.1.2 Configuring a Backup Task: Microsoft Exchange

This set of options enables you to select the backup settings for the account, team or site. Click the settings • icon on the top right side of the screen.



Test Bockup 🖉 1 Homepage > Test Backup			
Connected 🕖 2			۰
Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing an	nount		
✓ Index all data for Search ●	Backup Datacenter	Retention Period	0
	8 EU (ireland)		
Backup Unlicensed accounts	Backup Frequency	Backup Hour (UTC)	
Retain auto-archived backups for days before deleting	Daily	23:00	~
Automatically activate new mailboxes 💿			
Bulk Activation and Management			
+ Create a new Activation Rule			

- 1. You can change the name of the backup task by clicking \checkmark .
- 2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 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 green Connected icon changes to the red 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. In the Microsoft Exchange system, accounts can have an "Unlicensed" status (not to be confused with "Unlicensed product"). These can be the external accounts invited by users with an active license, accounts automatically generated for shared file storage, etc. You can find the license status of an account using the Admin Center. Check **Backup Unlicensed accounts** if you want CloudAlly to back up such accounts.

Note: "Unlicensed" accounts have limited permissions, and we don't advise using "Unlicensed" administrator accounts.

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.



- 6. The Automatically activate new mailboxes option instructs the system to detect new mailboxes, and begin backing them up automatically.
- 7. Create a new activation rule see explanation below.
 - **Note:** The **Backup Data Center** and **Retention Period** fields are "display only," and their values can't be changed here.
- 8. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.
- 9. 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 submitting a support ticket. 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 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.

- 10. 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. 3x a day
 - ii. Daily
 - iii. Every 3 Days
 - iv. Weekly
 - b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.



Note: Adding more frequent backups is possible via a support request.

3.1.3 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 bottom of the screen where all of your account, team or site are listed.

Note: The screens below are from Microsoft 365 Exchange, but the functionality is identical for all of the Microsoft 365 applications.

(3				bob	.smith@ca4software.	onmicrosoft.com Bo	b Smith Log	Out 📑
) Homepage	Full MS Exchange Backup 🖋 Homepage > Full MS Exchange Backup							
jobs	Connected @							۲
Covery Recovery Activity Settings	12 Total Malibaxes Arave Peard Archived Co Search by account nume or email				Status	V Togs v		÷
	□ ∨ Mailbox	÷ Email	Tags	Status \$	Backup Size 🔅	Last Backup 🗘	Actions	
	Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Manager	_	703.74 KB	48 days ago	6 8	~
	Alex Duglas	Alex.Duglas@ca4software.onmicrosoft.com			3.27 MB	48 days ago	6 8	~
	Bob Smith	bob.smith@ca4software.onmicrosoft.com	Manager		6.58 MB	48 days ago	6	~
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com			1.16 MB	48 days ago	60	~
	Einance department	financedepartment@ca4software.onmicrosoft.com			6.57 KB	48 days ago	60	~
	Ida Taylor	lda.Taylor@ca4software.onmicrosoft.com			40.68 KB	48 days ago	6 8	~
0 Support	Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	Manager		551.02 KB	48 days ago	<u>ی</u> و	Help

- 2. Select one or more account, team or site(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.



3				b	ob.smith@ca4software	onmicrosoft.com B	ob Smith 🛛 Log Out 📄
mepage	Full MS Exchange Backup 🖉 Homepage > Full MS Exchange Backup						
Jobs							۲
ecovery &	12 Total Mailboxes Active Paused Archived						© (+)
(3) lettings	(Search by account name or email	◯ (〒 Filter by Lag			Statu	s v Tags v	🛱 Activate
	Mailbox	Email	tags	Status	Backup Size	Last Backup 🔅	Pause
	Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Manager		703.74 KB	48 days ago	🕆 Delete
	Alex Duglas	Alex.Duglas@ca4software.onmicrosoft.com			3.27 MB	48 days ago	5 8 V
	Bob Smith	bob.smith@ca4software.onmicrosoft.com	Manager		6.58 MB	48 days ago	⊚ ⊗ ∨
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com			1.16 MB	48 days ago	⊚ ⊗ ∨
	Einance department	financedepartment@ca4software.onmicrosoft.com			6.57 KB	48 days ago	⊚ ⊗ ∨
	Ida Taylor	Ida.Taylor@ca4software.onmicrosoft.com			40.68 KB	48 days ago	5 8 V
(D) iupport	Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	Manager		551.02 KB	48 days ago	S 💿 Help

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

3.1.4 Bulk Activation and Management

To create a new Activation Rule, click . The following *Bulk Activation and Management* screen appears:

Bulk Activation and Mana	gement	0 • •
	vate By Active Directory Settings Active Directory settings to activate groups	
	vate By MS365 Groups MS365 Groups to activate groups	
	ort List Of Accounts ort CSV file in following format: single Account Email column	



3.1.4.1 Activate by Active Directory Settings

If you choose to activate by directory settings, the following screen appears next. Select the property that will be the basis for your new Activation Rule.

Activation	and Management Activate by Active Directory settings	•
	Property	
	Search property Q	
	Account Enabled	
	Age Group	
	City	
	Company Name	
	Country	
	Department	
	Job Title	
	Office Location	

If you want to create a conditional activation rule, click **Automatically activate new** accounts that match this condition, and then click **Next**.

Bulk Activation an	d Management Activate by Active Directory settings			• • •
	Property			
	Account Enabled	\sim		
	✔ true			
	Automatically activate new accounts that match this condition			
←Back			Cancel	Next

The following pop up will appear.



	 Please note, "Automatically activate ALL new accounts" is enabled in Settings. Do you want to disable it and keep only conditioned activation? Continue To Automatically Activate ALL New Accounts Activate Only By Conditions Set Through Bulk Activation
Co	ntinue To Automatically Activate ALL New Accounts
Ac	tivate Only By Conditions Set Through Bulk Activation
	Cancel Confirm

The pop up includes two available options for activation:

- Continue To Automatically Activate ALL New Accounts
- Activate Only By Conditions Set Through Bulk Activation

New accounts matching the selected Property will be automatically detected and activated in the backup system. This does not affect the already existing accounts.

 Click Next once you have selected the desired Property and its values. The list of accounts matching the selected Property is displayed. Review the list of accounts that will be activated. You can clear the check boxes next to an account to exclude it from the activation process.

	Bulk Activation and N	Anagement Activate by Active Dire	ctory settings		•• • 0
	✓ Autotest	autotest@cloudally.com	Job Title	Autotest	
nt					F
					E
	←Back			Cancel	Activate



 Click Activate. The selected accounts are activated, and if you have selected the Automatically activate new accounts that match this condition check box, the conditional activation rule is created.

3.1.4.2 Activate by MS365 Groups

- If you choose to activate by Microsoft 365 Groups, the following screen appears next. Activation by Microsoft Groups works for already existing mailboxes.
- Select the group(s) you would like to back up:

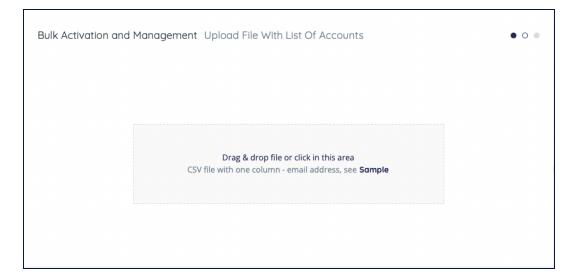
Bulk Activation and M	lanagement Activate by MS365 Groups		• •
	Q Search Group		
	ADSync Admins		
	Group _Private 2020		
	Helpdesk Agents		F
	Private Team Admin		
	Private Team for Kristen		E
	Steven group		
	Automatically activate new accounts that match this condition		
←Back		Cancel	Next

Note: Selecting the **Activate ALL new accounts** check box in the Backup Settings removes all conditional activation rules.

3.1.4.3 Import a List of Accounts

If you choose to **Import a List of Accounts**, you will be prompted to upload a CSV file with a single column titled "Account Email."





3.1.5 Backing Up a Public Folder

In order to back up a Public Folder, the Admin account must have a mail Microsoft 365 Exchange license and needs to have read/write permissions for the Public Folder.

To back up a Public Folder:

- 1. From the Exchange Admin Center, click Public Folders.
- 2. Select the Public Folder that you want to back up and click '...' to select Root Permissions.
- 3. Verify that the Admin account used for the CloudAlly backups has read/write access to the Public Folder. If not, click '+' to add the Admin Account.

Public Folders data will be available for recovery under the PublicFoldersAccount record, listed among other backed up Exchange users.

The restore process for a Public Folder creates a sub-folder. Add the generated restore folder as a new Public Folder in order to allow access to the restored data.

Follow the normal Microsoft 365 Exchange Online procedures to Create a Public Folder, using the CloudAlly restored sub-folder as the path, as well as any additional sub-folders that are included in the restore.

3.1.6 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.

٩		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
C Homepage	Homepage	
]obs	4 Backups	8 🔮 (+) Add Backup Touk
Recovery		Total Arthve Total Size 12 12 14.81 MB 92 days ago In 12 hours
Settings	er er er Groups/Teams Backup /* er Groups/Teams Backup /* Succeeded	Total ① Active ② Total Size Last Snapshot Next Backup Of Recture 9 8 390.41 KB 25 days ago In 9 hours
	P Sharepoint Backup / Microsoft SharePoint Succeeded	Total @ Active @ Total Size Last Snapshot Next Backup @ Recover 12 11 115.05 MB 25 days ago In 8 hours
	OneDrive Backup Ø Microsoft OneDrive Succeeded	Total Active Total Size Isat Size Isat Size Isat Size Isat Size In 14 hours

- 2. Click the particular Microsoft 365 icon from the list or enter a keyword in the Search field to find a specific task. The *Microsoft 365 Backup* page is displayed.
- 3. Click **Settings** on the top-right section of the screen to see the backup settings.

٩			Bob.smith@ca4software.onmicrosoft.com Bob Smith
C Homepage	Full MS Exchange Backup 🖋 Homepage > Full MS Exchange Backup		
Jobs	Connected Ø		• • • • • • • • • • • • • • • • • • •
Recovery Activity	12 Total Maliboxes Anne Rused Anthred) (97 Filter by tog	(3) (+) (8000 ∨) (7091 ∨) (Action ∨)
	□ ~ Mallbox	Email	Status
	Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	703.74 KB one day ago 🕤 🛛 🗸
	Alex Duglas	Alex.Duglas@ca4software.onmicrosoft.com	3.27 MB one day ago 🗇 🖉 🗸
	Bob Smith	bob.smith@ca4software.onmicrosoft.com	6.58 MB one day ago 🕤 🔕 🗸
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com	1.16 MB one day ago 🕤 🔮 🗸
	Finance department	financedepartment@ca4software.onmicrosoft.com	6.57 KB one day ago 🕤 🔮 🗸
	Ida Taylor	Ida.Taylor@ca4software.onmicrosoft.com	40.68 KB one day ago 🗇 🔇 🗸
(D) Support	Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	551.02 KB one day ago 🕤 📀 Help

From here, it is possible to modify the fields described in <u>"Configuring a Backup</u> Task: Microsoft Exchange."



3.1.7 Removing 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.

3.1.7.1 Removing an Entire Backup Service

To remove an entire backup service, click \Box **Delete Backup** adjacent to the backup service you want to remove.

Microsoft 365 Exchange



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

Are you sure you wish to delete the ba Microsoft Exchange / bob.smith@ca4so microsoft.com?		ك
	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.

3.1.7.2 Removing an Individual Account, Team or Site

- 1. Click the backup service from which you want to remove the account, team or site. The backup task settings page is displayed.
- 2. Add a check next to the item that you want to remove. Click Delete in the



Actions menu.

				be	ob.smith@ca4software	.onmicrosoft.com E	Bob Smith Log	Out 📄
C Homepage	Full MS Exchange Backup 🖉 Homepage > Full MS Exchange Backup							
Jobs								ø
Recovery	12 Total Mailboxes Active Paused Archived						3	+
Settings	Q Search by account name or email	〔			Statu	s v Tags	🛱 Activat	te
	Agata Brown	Email Agata.Brown@ca4software.onmicrosoft.com	Tags	Status \$	Backup Size \$	Last Backup \$	Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause Pause	p Now
	Alex Duglas	Alex.Duglas@ca4software.onmicrosoft.com			3.27 MB	63 days ago	⊚ ⊗	~
	Bob Smith	bob.smith@ca4software.onmicrosoft.com	Manager		6.58 MB	63 days ago	S 8	~
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com			1.16 MB	63 days ago	S ⊗	~
	Finance department	financedepartment@ca4software.onmicrosoft.cor	n		6.57 KB	63 days ago	S ⊗	~
0	Ida Taylor	lda.Taylor@ca4software.onmicrosoft.com			40.68 KB	63 days ago	S 8	~
Support	Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	Manager		551.02 KB	63 days ago		Help

4. A pop-up window is displayed with a list of accounts selected for removal. Click **Delete**. The selected account, team or site are removed from your account.

	ut of chosen 1 maill eted, please confirn		÷
~	Bob Smith	bob.smith@ca4softwa	re.onmi
		Cancel	Delete

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

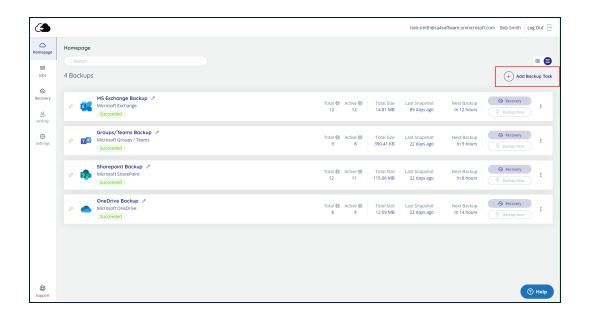


3.2 Microsoft 365 OneDrive

3.2.1 Adding a OneDrive Backup Task

To create a new CloudAlly 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.





٩			Bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
O Homepage	Homepage > New		
Jobs	Activate A New Backup		\bigcirc You will be directed to your account for authentication
୍ତ	Microsoft Exchange	Including: Mail, Calendar, Contacts and Tasks	
Recovery	T 🕺 Microsoft Groups / Teams	Including: Conversation, Calendar, Sites, Apps, Channels, Metadata	
Activity	Microsoft SharePoint	Including: Sites documents and Libraries	
Settings	Microsoft OneDrive	Including: Personal sites documents and Libraries	
		Including: Mail, Calendar, Contacts, Drive and Tasks	
	Google Shared Drives	Including: Files and Folders	
	Salesforce	Including: Organization data and Chatter	
	box Box	Including: Files and Folders	
	Cropbox Dropbox	Including: Files and Folders	
	Google Account	Including: Mail, Calendar, Contacts, Drive and Tasks	
	IMAP	Including: Mail	
(C) Support			() Help

The Activate A New Backup page is displayed:

3. Click the name of the service you would like to back up.



Enter your admin details					
* Backup Name					
Enter your backup name					
• Use OAuth based authorization	O Use credential based authorization				
* OneDrive URL					
Our authorization process uses OAuth and requires a Global Admin account.					
Cancel	Authenticate				

- 1. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
- 2. Add the OneDrive URL.

Note: You can copy the OneDrive URL by opening OneDrive and copying it from the address bar in your browser.

3. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.

IMPORTANT!

The user that you enter **must** have Global Admin permissions.



Note: "Use credential-based authorization" is not active by default, and we don't recommend it. If you would like to use this, contact CloudAlly support.

3.2.2 Configuring a OneDrive Backup Task

٩				bob.smit	n@ca4software.onmicrosoft.com	Bob Smith	Log Out 📄
 Homepage	OneDrive - full backup 2 Homepage > OneDrive - full backup						
Jobs							٥
Recovery	Backup Settings						
Activity	The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or ann						
0	Index all data for Search 1		kup Datacenter		Retention Period		0
Settings	Automatically activate new sites		irope (Ireland)	~	Unlimited		
		Bac	kup Frequency		Backup Hour (UTC)		
	Retain auto-archived backups for days before deleting	7	aily		4:00		~
						Cancel	Save

- 1. You can change the name of the backup task by clicking the pencil icon \mathbb{Z} .
- 2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 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 green Connected icon changes to the red 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 sites option instructs the system to detect new teams and groups, 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 submitting a support ticket. 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 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
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**

Note: Adding more frequent backups is possible via a support request.



3.2.3 Activating a Backup Task

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data. For instructions, see "Activating Your Backups."

3.2.4 Modifying the Settings of an Existing Backup

See instructions in "Modifying the Settings of an Existing Backup."

3.2.5 Removing a Backup

See instructions in "Removing a Backup."

3.3 Microsoft 365 SharePoint

3.3.1 Adding an Microsoft 365 SharePoint Backup Task

To create a new CloudAlly 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.



4 Bockups 4 Bockups						88 (
mm MS Exchange Backup * Total G Active 0 Total Size Last Snapshot Next Backup Microsoft Exchange 12 12 12 12 12 12 Microsoft Exchange 12 12 14.81 MB 89 days ago Next Backup Image: Succeeded Succeeded 12 12 14.81 MB 89 days ago Next Backup Image: Succeeded Image: Succeeded Total O Active 0 Total Size Last Snapshot Next Backup Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded Image: Succeeded		4 Backups	5			+ Add Backup T
Image: Sourceeded Total I Size Last Snapphot Next Backup Image: Sourceeded Image: Sourceeded Image: Sourceeded Image: Sourceeded Image: Sourceeded Image: Sourceeded Image: Sourceeded Image	зпу	0 E	Microsoft Exchange			
Concerning C		0 12	Microsoft Groups / Teams			
P Microsoft OneDrive Total 🖗 Active 🖗 Total Size Last Snapshot Next Backup G3 recovery		ø 🔹	Microsoft SharePoint			
		e 🌰	Microsoft OneDrive			

The Activate A New Backup page is displayed:

٩			Bob.smith@ca4software.onmicrosoft.com Bob Smith
C Homepage	Homepage > New		
Jobs	Activate A New Backup		② You will be directed to your account for authentication
6	Microsoft Exchange	Including: Mail, Calendar, Contacts and Tasks	
Recovery	T 🕺 Microsoft Groups / Teams	Including: Conversation, Calendar, Sites, Apps, Channels, Metadata	
Activity	Microsoft SharePoint	Including: Sites documents and Libraries	
 Settings 	Microsoft OneDrive	Including: Personal sites documents and Libraries	
		Including: Mail, Calendar, Contacts, Drive and Tasks	
	Google Shared Drives	Including: Files and Folders	
	Salesforce	Including: Organization data and Chatter	
	box Box	Including: Files and Folders	
	Stopbox Dropbox	Including: Files and Folders	
	Google Account	Including: Mail, Calendar, Contacts, Drive and Tasks	
	IMAP	Including: Mail	
(D) Support			⑦ Help

3. Click the name of the service you would like to back up.



Enter your admin details					
* Backup Name					
Enter your backup name					
• Use OAuth based authorization	O Use credential based authorization				
* SharePoint URL					
Our authorization process uses OAuth and requires a Global Admin account.					
Cancel	Authenticate				

- 1. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
- 2. Add the SharePoint URL.

Note: You can copy the SharePoint URL by opening SharePoint and copying it from the address bar in your browser.

3. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.

IMPORTANT!

The user that you enter **<u>must</u>** have Global Admin permissions.



Note: "Use credential-based authorization" is not active by default, and we don't recommend it. If you would like to use this, contact CloudAlly support.

3.3.2 Configuring an Microsoft 365 SharePoint Task

This set of options enables you to select the backup settings for the account, team or site. Click the settings icon on the top right side of the screen.

٩			bob.s	nith@ca4software.onmicrosoft.com	Bob Smith	Log Out 📑
O Homepage	Sharepoint Backup 🖉					
Jobs						٥
Covery Recovery	Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or	annual billing amount				
	✓ Index all data for Search	Backup Data	center	Retention Period		0
Settings	Automatically activate new sites	6 Europe (In	eland) 🚿	Unlimited		
		Backup Free	uency	Backup Hour (UTC)		
	Retain auto-archived backups for days before deleting	7 Daily		22:00		~
					Cancel	Save

- 1. You can change the name of the backup task by clicking the pencil icon \mathbb{Z} .
- 2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 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 green Connected icon changes to the red 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 sites option instructs the system to detect new teams and groups, 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 submitting a support ticket. 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 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
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**

Note: Adding more frequent backups is possible via a support request.



3.3.3 Activating a Backup Task

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data. For instructions, see "Activating Your Backups."

3.3.4 Modifying the Settings of an Existing Backup

See instructions in "Modifying the Settings of an Existing Backup."

3.3.5 Removing a Backup

See instructions in <u>"Removing a Backup."</u>

3.4 Microsoft 365 Teams & Groups

3.4.1 Adding an Microsoft 365 Teams & Groups Backup Task

To create a new CloudAlly 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.



) Dage	Home	epage		
4 Backups 4 Backups 5 Backups		Q Se	arch		88
my MS Exchange Backup /* my MS Exchange Backup /* my Mscross Exchange my </th <th></th> <th>4 Ba</th> <th>ckups</th> <th>;</th> <th>+ Add Backup To</th>		4 Ba	ckups	;	+ Add Backup To
groups/Teams Backup // Groups/Teams Backup // Total @ Active @ Total Size Last Snapshot Next Backup @ Backup Now # groups / Teams 9 8 390.41 KB 22 days ago In 9 hours @ Backup Now # groups / Teams 9 8 390.41 KB 22 days ago Next Backup @ Backup Now # groups / Teams Total @ Active @ Total Size Total Size Last Snapshot Next Backup @ Recovery # groups / Teams Microsoft Snapshot Next Backup @ Recovery # # # groups / Teams Microsoft Onebrive Total @ Active @ Total Size Last Snapshot Next Backup @ Recovery # groups / Teams Microsoft Onebrive Total @ Active @ Total Size Total Size Last Snapshot Next Backup @ Recovery #	ery	0	96	Microsoft Exchange	Total V Active V Total size Cast shapshot Next Backup
Active Total Active Total Active Total Size Last Snapshot Next Backup		ø	TR	Microsoft Groups / Teams	Total V Active V Total Size East Shapshot Next Backup
Microsoft OneDrive Total Active Total Size Last Snapshot Next Backup 8 8 1200 MB 22 days and in 14 hours 5		Ð	\$	Microsoft SharePoint	Total V Active V Total size East shapshot Wext Backup
		ø		Microsoft OneDrive	Total & Active & Total Size Last Shapshot Next Backup

The Activate A New Backup page is displayed:

٩		Bob.smith@ca4software.onmicrosoft.com Bob Smith 🛛 Log Out 📑
C Homepage	Homepage > New	
<u>⊒</u> swo Jobs	Activate A New Backup	\bigcirc You will be directed to your account for authentication
0	Microsoft Exchange	Including: Mail, Calendar, Contacts and Tasks
Recovery	T Microsoft Groups / Teams	Including: Conversation, Calendar, Sites, Apps, Channels, Metadata
Activity	Microsoft SharePoint	Including: Sites documents and Libraries
 Settings 	Microsoft OneDrive	Including: Personal sites documents and Libraries
		Including: Mail, Calendar, Contacts, Drive and Tasks
	Google Shared Drives	Including: Files and Folders
	Salesforce	Including: Organization data and Chatter
	box Box	Including: Files and Folders
	Stopbox Dropbox	Including: Files and Folders
	Google Account	Including: Mail, Calendar, Contacts, Drive and Tasks
	IMAP	Including: Mail
(D) Support		() нер

3. Click the name of the service you would like to back up.



T 😤 Enter your admin details
* Backup Name
Teams/Groups backup
Please note that our authorization process uses OAuth and requires a Global Admin account.
Cancel Authenticate

- 1. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
- 2. You will see the OAuth based authorization Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your Microsoft account.

IMPORTANT!

The user that you enter **<u>must</u>** have Global Admin permissions, as well as a Microsoft 365 Teams license.

Note: "Use credential-based authorization" is not active by default, and we don't recommend it. If you would like to use this, contact CloudAlly support.

3.4.2 Configuring an Microsoft 365 Teams & Groups Backup Task

This set of options enables you to select the backup settings for the account, team or site. Click the settings icon on the top right side of the screen.



Groups/Teams backup /				
				٥
Backup Settings The automatic addition/deletion of an account, site, domain, table or drive car	in affect your monthly or annual billing	amount		
☑ Index all data for Search ●	3	Backup Datacenter	Retention Period	0
	6			
Automatically activate new groups / teams	4	Backup Frequency	Backup Hour (UTC)	
Retain auto-archived backups for days before deleting (5 0	Daily	3:00	~
	Ť			
			Cancel	Save

- 1. You can change the name of the backup task by clicking \checkmark .
- 2. The icon to the right of the Microsoft 365 logo displays whether the application was able to connect to the specified Microsoft 365 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 green Connected icon changes to the red 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 groups/teams option instructs the system to detect new teams and groups, 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.



- **Note:** Your backup storage location cannot be changed once it's been set during the account setup process. Contact 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
- a. 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 submitting a support ticket. Backups older than the retention period specified will be automatically deleted.

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. 3x a day
 - ii. Daily
 - iii. Every 3 Days
 - iv. Weekly
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

Note: Adding more frequent backups is possible via a support request.

3.4.3 Activating a Backup Task

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

For instructions, see "Activating Your Backups."



3.4.4 Modifying the Settings of an Existing Backup

See instructions in "Modifying the Settings of an Existing Backup."

3.4.5 Removing a Backup

See instructions in <u>"Removing a Backup."</u>



4 Recovering Your Backed Up Data

4.1 Microsoft 365 Exchange: Performing a One-Click Full Mailbox Recovery

- 1. There are two ways to perform a one-click full mailbox recovery:
 - a. From the Homepage, on the Microsoft 365 backup that you would like to restore or export, click **Recovery.**

ð 📑	MS Exchange Backup & Microsoft Exchange Succeeded	Total 🚯 55	Active 📵 4	Total Size 5.75 MB	Last Snapshot 8 days ago	Next Backup In 11 hours	Recovery Backup Now
-----	---------------------------------------------------------	---------------	---------------	-----------------------	-----------------------------	----------------------------	-------------------------

b. OR: From the Homepage, click the backup you would like to restore. Locate the user account you want to restore, and click the **Recovery** icon in the **Actions** column.

									_
Homepage		Exchange Backup 🎤							
jobs									۲
Recovery	12 7	otal Mailboxes						٢	(7)
8 Activity		Paused Archived						U	0
© Settings		learch by account name or email) (T Filter by tag			Statur	Togs Togs	Action	9
		Mailbox 0	Email	o Tags	Status 0	Backup Size 🜼	Last Backup 🜼	Actions	
		Agata Brown	Agata.Brown@cs4software.onmicrosoft.com	Manager		703.74 KB	5 days ago	© 0	~
		Alex Duglas	Alex.Dugias@ca4software.onmicrosoft.com			3.27 MB	5 days ago	Recovery	~
		Bob Smith	bob.smith@ce4software.onmicrosoft.com	Manager		6.58 MB	5 days ago	00	×
		<u>Charles Wilson</u>	Charles.Wison@ca4software.onmicrosoft.com			1.16 MB	5 days ago	⊙ ●	~
		Einanse desartment	financedepartment@ca4software.onmicrosoft.com			6.57 KB	5 days ago	⊙ Ø	~
		ida Taylor	Ide.Teylor@ce4software.onmicrosoft.com			40.68 KB	5 days ago	o o	~
		Jacob Anderson	Jacob Anderson@ca4software.onmicrosoft.com	Manager		551.02 KB	5 days ago	o o	~
		Jessica Miller	Jessica Miler@ca4software.onmicrosoft.com			1.09 MB	5 days ago	⊙ O	~
		PublicFoldersAccount	PublicFoldersAccount			3.01 K8	5 days ago	o o	~
		Ropy.White	Rosy.White@ca4software.onmicrosoft.com			453.13 KB	5 days ago	S 0	~
		Sarah Johnson	Sarah Johnson@ca4software.onmicrosoft.com			1,018.32 KB	5 days ago	S 0	×
() Support		Scarlett Davis	Scarlett.Davis@ca4software.ormicrosoft.com			0 Bytes	5 days ago	© ©	Help

3. Click Full Mailbox Recovery.



Advanced Reco	very Options for m.steward@cloudally.com		0 • • •
	Full Mailbox Recovery		
	Recover a complete Exchange mailbox or only certain Sub Services. The selected sub services will be completely recovered.		
	Choose Recovery Options:		
	Export Restore		
	Selective Mailbox Recovery Browse & Search Exchange mailbox backups and select which items to recover.		
	Ca	ancel	Next

The subsections below explain about the two options: Export or Restore.

4.1.1 Exporting Your Backed Up Data

1. Click **Export** to download a .zip file of your backed up data.

Full Mail	box Export for m.steward@cloudally.com	0 • • •
	Full Mailbox Recovery Recover a complete Exchange mailbox or only certain Sub Services. The selected sub services will be completely recovered. Choose Recovery Options: Export Restore	
	Selective Mailbox Recovery Browse & Search Exchange mailbox backups and select which items to recover.	
	Ca	ncel Next



- 2. Choose the backup you want to export.
 - a. First option: restore the Last Backup.
 - b. Second option: click **Specific Backup Date** and select a backup date from the calendar with a backup status indication.

	Full	Mail	box	Expo	rt foi	r bo	b.smith(
	se the d Last E			backu	p to b	e use	d for Reco
	Specif Browse Backup	the cal	endar		ect a sj	pecific	backup date
	« « Su 29 5 12 19 26 3	Mo 30 6 13 20 27 4	Tu 31 7 14 21 28 5	We 1 8 15 22 29 6	Th 2 9 16 23 30 7	Fr 3 10 17 24 1 8	Sa 4 11 18 25
← [Back						

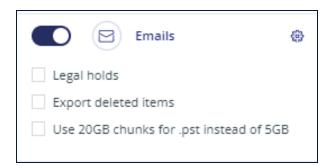
Dot Co	lor	Meaning
	Green	Successful backup
0	Orange	Partially successful backup
	Two dots	Multiple backups on that date

- 3. Select which sub-services to export.
 - a. The default is all sub-services.
 - b. Click a toggle to the "off" position to remove individual sub-services.



Full Mailbox Export for m.stewa	rd@cloudally.com			••••
Sub Services selection and configuration 🔀		Export in ZIP format		
Emails @		For download		\vee
Contacts				
Tasks				
Calendars				
Notes				
For full Mailbox Export we use Outlook compatible F	PST. format			
←Back			Cancel	Next

- 4. Select the settings icon next to the Emails sub-service. The following options are available:
 - a. Legal holds: Choose this option if you want to export all legal / litigation holds placed on this mailbox using Microsoft's Exchange Online Archive (EOA) service.
 - b. **Export deleted items**: recover items that were deleted in the past, even those that are no longer in the Deleted or Recoverable Items folders.
 - c. Use 20 GB chunks for .pst: if the mailbox is very large, this option has the benefit of generating fewer files that are each 20 GB, rather than the default size of 5 GB.





- 5. Select the export ZIP destination, such as direct download, Amazon S3, Azure Blob, Box, Dropbox, AWS S3 Compatible (if you are bringing your own storage) or Google Cloud Platform. Depending on which option you choose, there will be other data to complete (e.g., Bucket Name, Access Key and Secret Key for Amazon S3).
- 6. Review the information on the confirmation screen. If the information is correct, click **Export** to begin the recovery task. (If the information is not correct, click **Cancel**.)

Full Mailbox Exp	ort for m.steward@cloudally.com	• • • 0
Please Confirm		
The Export Request for:	Emails; Contacts; Tasks; Calendars; Notes	
Export as:	PST. format	
Backup Date:	01:46 PM Mar 10 2022	
Export from archive of:	m.steward@cloudally.com	4
Selected Storage Center:	For download	
	wnload link will be sent to you upon completion.	
When Export will be activated	d, you can check the status on the jobs page	
←Back		Cancel Export

- 7. Check the *Jobs* page to track the progress of your job. See "Tracking Recovery Tasks on the Jobs Page" on page 80 for details.
- 8. When the export is complete, click Download Results.

Full MS Exchange Microsoft Exchange bob.smith@ca4softw		Export			Succeeded
Started at: Aug 23 2022 at 05:20 PM	Backup Date: Jul 06 2022 at 05:06 AM	Initiator: bob.smith@ca4software.onmicrosoft	Destination: Direct Download	Total Items: 95	Size 2.25 MB
Cancel				Downloa	d Results View Log

A new page will open which will enable you to download your data file.



0	dot.	
Homepage	Jobs > Download File(s)	
⊒ <u>=</u> Jobs	Full MS Exchange Backup	
6	bekunthije akolomen zomionoolt con	
Recovery	File Name 0 Size 0	Actions
8		•
Activity	bith.amith_cateGhaves.com/icrosoft.com_c6/ender_J022076502003.0.1;p 12.1448	0
Settings		
© Support		() Help
🐱 bob	smith_ca4softzip ^	Show all

4.1.2 Restoring Your Backed Up Data

1. Click **Restore** to recover your backed up data and store it either in its original location or a different one.

C Full Mailb	ox Restore for m.steward@cloudally.com	0	• • •
	Full Mailbox Recovery Recover a complete Exchange mailbox or only certain Sub Services. The selected sub services will be completely recovered. Choose Recovery Options: Export Restore Restore Selective Mailbox Recovery Browse & Search Exchange mailbox backups and select which items to recover.		
		incel	Next



- 2. Choose the backup you want to restore.
 - a. First option: restore the Last Backup.
 - b. Second option: click **Specific Backup Date** and select a backup date from the calendar with a backup status indication.

	Full	Mail	box	Expo	rt foi	r bo	b.smith
Cho	ose the d			backu	p to b	e use	d for Rec
	Backup	the cal	endar	and sel	ect a sj		backup da
	« « Su 29 5 12 19 26 3	Mo 30 6	JI Tu 31 7 14 21 28 5	22	Th 2 9 16 23 30 7	Fr 3 10 17 24 1 8	> >> Sa 4 11 18 25 2 9
~	Back						

Dot Co	lor	Meaning
•	Green	Successful backup
•	Orange	Partially successful backup
	Two dots	Multiple backups on that date



C Full Mailbox Restore for m.steward		• • • •
Choose the date of the backup to be used for Recovery:	Successful Backup 08:27 AM Mar 10 2022	Successful Backup 01:46 PM Mar 10 2022
Specific Backup Date Browse the calendar and select a specific backup date Backup date Mar 10 2022		
←Back		Cancel Next

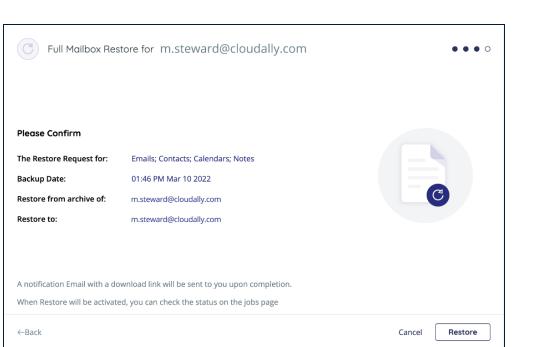
- 3. Select which sub-services to restore.
 - a. The default is to restore all sub-services.
 - b. Click a toggle to the "off" position to remove individual sub-services.

C Full Mailbox Restore for bob.smith@ca4	4software.onmicrosoft.com ● ● ● ○ ●					
Sub Services selection and configuration 🕤	Restore Destination					
Emails	Restore to the original account Restore to another account					
Contacts						
Tasks	Restore Type Non-destructive restore \vdots					
Calendars	Existing data will remain as-is, and the restored data will be in a dedicated folder, preserving the original folder structure. Use this option: to keep restored data separate, enabling					
Notes	manual drag & drop of items to relevant folders.					
← Back	Cancel Next					



- 4. Restore Destination: Choose where to restore your backup to:
 - a. The default is to restore to the original account.
 - b. Alternatively, you could restore to a different account, provided it is within the same domain. Click that option, and select an account from the drop-down list.
- 5. **Restore Type**:Choose one of the following:
 - a. Non-destructive restore: Existing data will remain as-is, and the restored data will be in a dedicated folder, preserving the original folder structure.
 Use this option: to keep restored data separate, enabling manual drag & drop of items to relevant folders
 - b. Replace restore: Restored content will be merged with existing data.
 - i. Deleted items and folders will be restored from the snapshot.
 - ii. Existing items will be overwritten with the snapshot version.
 - iii. Use this option: to restore or repair deleted / modified items
 - c. Bypass restore: Restored content will be merged with existing data.
 - i. Deleted items and folders will be restored from the snapshot.
 - ii. Existing items will be skipped.
 - iii. Use this option: to restore deleted data
- 6. Review the information on the confirmation screen. If the information is correct, click **Next** and then **Restore** to begin the recovery task. (If the information is not correct, click **Cancel**.)





- 7. Check the *Jobs* page to track the progress of your job. See <u>"Tracking Recovery</u> <u>Tasks on the Jobs Page"</u> for details.
- 8. After the restore task completes, you will receive a Confirmation Report by email.



4.2 Microsoft 365 Exchange: Using the New Recovery Page

4.2.1 Navigating to the Recovery Page

There are two ways to get to the recovery page:

From the *Homepage*, locate a backup task, and click its name.

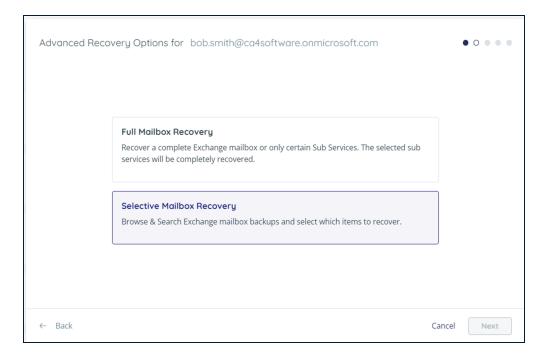
Homepage	Homepage	
		× 😝
jobs	7 Backups Full MS Dicharge Badap	+ Add Bockup Task
Recovery Addity		Total (I) Active (I) Total Size Last Supplied Next Buckup (I) (I) 12 12 14.81 MB 6 days ago In 17 hours (I) (I) (I)
() Settings	Full Teams Bockup # @ ISB Microsoft Geopar Teams Pendry Socied	Total () Active () Total Size List Straphor Next Birdup () Revery () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () () <t< th=""></t<>

And then click the name of the mailbox.

) Homepage	Full MS Exchange Backup 🖋 Homepage > Full MS Exchange Backup							
jobs								۲
Recovery	12 Total Mailboxes Adive Paused Archived						0	+
() Settings	C Search by account name or email) (Filter by tag			Status	▼ Togs ∨	Action	
	□ ~ Mailbox	¢ Email	0 Tags	Status 0	Backup Size 🔅	Last Backup 🔅	Actions	
	Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Manager		703.74 KB	6 days ago	© 0	~
	Bob Smith	Alex. Duglas@ca4software.onmicrosoft.com			3.27 MB	6 days ago	© 0	~
	Bob.Smith	bob.smith@ca4software.onmicrosoft.com	Manager		6.58 MB	6 days ago	© 0	~
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com			1.16 MB	6 days ago	6 0	~
	Einance department	financedepartment@ca4software.onmicrosoft.com			6.57 KB	6 days ago	© 0	×

- Or, if you are on the home page, click **Recovery**
 - Look for the desired mailbox using the search bar, or scroll down the list until you find the one that you'd like to recover.
 - On the next screen, click Selective Mailbox Recovery





4.2.2 Choosing a Backup Date

Which backup are you looking for? The default is the last backup date, but if you'd like to change to an earlier date, click the calendar icon.

User Name Bob Smith	Email bob.smith@ca4software.onmicrosoft.	tom	Last Backup 6 days ago		Total Size 6.58 MB	Backup Status	
Jul 06, 2022 at 05.06 AM						Advanced Search	₫ Restore
95 Emoils	5 i Contacts	Tasks		392 Calendars	i B ³ Notes	1	
Folders	From	s	ubject			Date 0	
🗌 🗀 Inbox							
Crafts							
Sent Items							
Deleted Items							
🗌 🗋 Junk Email							
Archive							
Conversation History							
Outbox							
Recoverable items				Choose a fold			
(Restored emails) - backup 2022-06-01 08:13				its cont	ent		
Circle (Restored emails) - backup 2022-06-02 08:49							
C: (Restored emails) - backup 2022-06-14 02:01							
(Restored emails) - backup 2022-06-29 08:09							
(Restored emails) - backup 2022-06-29 13:00							

The green dots indicate that one or more successful backups were performed on that day, and an orange dot indicates a partial backup. Two dots indicate that multiple backups were performed on that day.



Choos	e the	Back	up D	ate			
		Jul	202	2			Successful Backup Successful Backup 05:02 AM Jul 05 2022 11:19 AM Jul 05 2022
Su	Мо	Tu	We	Th	Fr	Sa	
26	27	28	29		01	02	
03	04	05	06	07	08	09	
10	11	(12)	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	
31	01	02		04			
							Cancel Confirm

Dot Co	lor	Meaning
	Green	Successful backup
0	Orange	Partially successful backup
	Two dots	Multiple backups on that date

• Select your desired date, and click **Confirm**.

4.2.3 Browsing Your Backups

Each of the backed up sub-services has a card at the top of the screen: Emails, Contacts, Tasks, Calendars and Notes.

٩					Bob.smith@ca4software.onmicrosoft.com Bob Smith
Homepage	Browse Bockup for "Full MS Exchange Backup Homepage > Full MS Exchange Backup > Bob Smith	r			
geno Jobs	User Name Bob Smith	Email bob.smith@ca4software.onmicrosoft.com	Last Backup 6 days ago	Total Size 6.58 MB	Backup Status
Recovery	Jul 06, 2022 at 05.06 AM				Advanced Search O Restore ± Expor
<u>&</u> Activity	95 : Emoils	5 i Contacts i	ks 392 Calendars	i 3 Notes	
() Settings	Folders	From	Subject		Date 0

- Each of the cards has a number on it, which shows how many items there are on that date – in the mailbox, in the list of contacts, in the list of tasks, in the calendar, or in the list of notes.
- Each of the cards also has a green or red status indicator, which lets you know whether the sub-service was successfully backed up.



Choosing Items to Restore or Export

After you have selected the date of the backup, and the sub-service to recover, you need to choose which items to restore or export.

The Recovery folders are in the same familiar order as they are in Outlook, to make it easy for you to find the item you are looking for.

Folders
🗌 🗀 Inbox
Drafts
Sent Items
Deleted Items
🗌 🗀 Junk Email
Archive
Conversation History
Outbox
Recoverable Items
In-Place Archive
• 🗌 🗋 (Restored emails) - backup 2022-06-02 08:49
• 🗌 🗋 (Restored emails) - backup 2022-06-14 02:01

In addition to the usual folders, such as Inbox, Sent Items, and Deleted Items, at the bottom of the list you will find the Recoverable Items folder, and the In-Place Archive folder (if it has been activated) followed by the CloudAlly Restored folders with a blue label.

4.2.3.1 Email

• Select the Inbox to see its contents.



C Homepage	Browse Backup for "Full MS Exchange Backup" Homepage > Full MS Exchange Backup > Bob Smith							
Jobs	User Name Bob Smith	Email bob.smith@c	a4software.onmicrosoft.com	Last Backo 6 days age		al Size I MB	Backup Status	
Recovery	Jul 05, 2022 at 05:02 AM						Advanced Search O Restore	± Export
8 Activity	95 Emoils	Contacts	(Tasks	Calendars	I B Notes	I	
 Settings 	Folders		From	Subject			Date 0	
	D Inbox		Jacob Anderson	Candidate for office manager	position		Jul 04, 2022 at 01:28 PM	v ^
	Drafts Sent Items		Jessica Miller	Problem with the pepperoni of	rder		Jul 04, 2022 at 01:22 PM	×
	Deleted Items		Jessica Miller	Accepted: Weekly staff meeting	8		Jul 04, 2022 at 01:21 PM	~
	Junk Email Archive		Jessica Miller	Getting multiple requests for	gluten-free pizza		Jul 04, 2022 at 01:21 PM	~
	Conversation History		Alex Duglas	Pecorino and Romano			Jul 04, 2022 at 01:17 PM	~
	Outbox		Alex Duglas	Re: Mozzarella cheese order			Jul 04, 2022 at 01:15 PM	~
	Recoverable Items		Alex Duglas	Mozzarella cheese order			Jul 04, 2022 at 01:13 PM	~

- You can choose one or more messages, or you can choose the entire Inbox.
 - To restore everything, all of the folders and their contents, click Folders.
 - Or, select the menu in the Email card, and then Select All.

Browse Backup for "Full MS Ex Homepage > Full MS Exchange Back	
User Name Bob Smith	Email bob.smith@c
Jul 05, 2022 at 05:02 AM	
95 Emails	5 Contacts
Folders	🛱 Clear Selected
🗌 🗀 Inbox	

 If you looking for a specific email, click the arrow of the email to see the first line of the message.

Note: The option to expand a sub-service item and view additional information, such as the first line of an email message, is only available for users with "Preview backed up data" permission. This feature is set by the CloudAlly account administrator.



(•	
\sim	
Homepage	~ Operations
NEW	General
Jobs	✓ View Account setting page ①
6	View billing page and manage payment details 🚯
Recovery	View support page 🕕
	View account activity 🕕
0	Show all your support tickets
Activity	Manage Notifications
@	View backups page 🚯
Settings	✓ Backup Tasks
	Activate new backup tasks ①
	Modify backup tasks 🚯
	Delete backup tasks 🕕
	Pause backup tasks
	 Execute backup tasks
	Cancel backup tasks
	View backups tasks
	Preview backed up data
	Restore backups
	Export backups
	Delete backup Items - GDPR Right to Erasure

Folders		From	Subject	Date \$	
🗆 🗀 Inbox		Jacob Anderson	Candidate for office manager position	Jul 04, 2022 at 01:28 PM	~
Drafts Sent Items		Jessica Miller	Problem with the pepperoni order	Jul 04, 2022 at 01:22 PM	~
Deleted Items		Jessica Miller	Accepted: Weekly staff meeting	jul 04, 2022 at 01:21 PM	~
Dunk Email		Jessica Miller	Getting multiple requests for gluter-free pizza	Jul 04, 2022 at 01:21 PM	• •
Conversation History	Γ	Recipients: Bob Smith: Alex Duglas			
Cutbox Recoverable Items		Message: Dear Bob, Just wanted to make you aware that w	eve been getting lots of requests for gluten-free pizza. How hard would it be		
		Alex Duglas	Pecorino and Romano	Jul 04, 2022 at 01:17 PM	~
(Restored emails) - backup 2022-06-02 08:49		Alex Duglas	Re: Mozzarelia cheese order	Jul 04, 2022 at 01:15 PM	~



4.2.3.2 Contacts

When you select Contacts, you can see all of the details about the people in your list: Name, Email, Phone, Address, Job Title, and Company name.

95 Emails	5 Contac	ts	Tasks		Calendars	: Notes	
Folders		Name		Email		Updated At 🔅	
Contacts		Paulina Parmesan		paulina@parmesancheese.com		Jul 04, 2022 at 01	40 PM
ExternalContacts Contacts-(Restored contacts) - backup 2022-06-27 02:01		Joe Framagio		joe.framagio@gmail.com		Jul 04, 2022 at 01	:40 PM .
		Email(s): joe.framagio@gmail.com Phone(s): 054-214-9032 02-999-3204			Company: pizza perfecto Job Title: store manager		
		Sofia Mozarella		sofia.mozarella@hotmail.com		Jul 04, 2022 at 01	40 PM
		Arturo Romano		aromano@supplychain.com		Jul 04, 2022 at 01	40 PM

4.2.3.3 Tasks

When you select the Tasks sub-service, you can see the Subject, Status and Due date.

95 : 5 Emails Contacts	: 12 : Tasks	392 E Colendars	Notes	1
Folders	Subject	Status D	Due Date	Updated At 0
Tasks	Meet with other pizza restaurant owners to review current trends.	Not Started Ju	ul 15, 2022 at 12:00 AM	Jul 04, 2022 at 01:40 PM
Tasks - (Restored) - 2022-06-27 02:01	Talk to joe about demand for thin-crust pizza vs. thick-crust pizza	Not Started ju	al 04, 2022 at 12:00 AM	Jul 04, 2022 at 01:40 PM
	Monthly order of all supplies	Not Started Ju	al 05, 2022 at 12:00 AM	Jul 04, 2022 at 01:40 PM
	Visit to the bank	Completed J.	un 20. 2022 at 12:00 AM	Jul 04, 2022 at 01:40 PM
	Monthly order of all supplies	Completed ju	al 05, 2022 at 12:00 AM	Jul 04, 2022 at 01:40 PM

4.2.3.4 Calendar

When you select a Calendar event, you can see the start and end dates, and if you select it, you can see the description.

95 Emolis Contacts	: 12 : 2392 : Colendors	Notes	1	
Folders	Event	Start	End	
Calendar	Store managers meeting	jul 07. 2022 at 09:00 AM	Jul 07, 2022 at 10:00 AM	~
United Kingdom holidays United Kingdom holidays - (Restored) - 2022-06-14 02:01	Weekly staff meeting	jul 05. 2022 at 09:00 AM	Jul 05. 2022 at 09:30 AM	~
United Kingdom holidays - (Restored) - 2022-06-29 08:09	Visit the downtown pizza store	jul 05. 2022 at 00:00 PM	Jul 05, 2022 at 04:30 PM	^
United Kingdom holidays - (Restored) - 2022-06-29 13:00	Description: do we need more tables and chars? derek mentioned that it's been crowded.			
	Market research on pizza toppings - what's new?	Jul 06, 2022 at 06:00 AM	Jul 06, 2022 at 10:00 AM	~



4.2.3.5 Notes

When you choose a note, you can preview its contents.

٩				bob.smi	ith@ca4software.onmicrosoft.com Bob Smith	Log Out
Homepage	Browse Backup for "Full MS Exchange Homepage > Full MS Exchange Backup > Bob					
Jobs	User Name Bob Smith	Email bob.smith@ca4software.onmicrosoft.com	Last Backup 61 days ago	Total Size 6.58 MB	Backup Status	
Recovery	Jul 06, 2022 at 05:06 AM 📋				Advanced Search C Restore	± Export
<u>A</u> ctivity	95 Emails	5 E	12 : Tasks	392 Calendars	i i Notes	:
Settings	Folders	✓ Subject			Updated At 💠	
	🗹 🖿 Notes	Find a new mushroom sup	olier - the latest deliveries have been terrible o	quality!	jul 04, 2022 at 01:40 PM	~
		Need to do more market re	search - should our tomato sauce be more sa	avory or sweet?	Jul 04, 2022 at 01:40 PM	~
		Check out gluten-free pizza	option		Jul 04, 2022 at 01:40 PM	×
(D) Support						(?) Help

4.2.4 Restore

Once you select one or more items, the **Restore** button becomes active. When you click **Restore**, you will see all of the sub-services that you selected.

- You can choose to remove any of the sub-services by sliding the toggle bar to the left.
- By default, CloudAlly assumes you want to restore to the original account, or you can restore to a different account, as long as it is in the same domain.



4.2.4.1 Restore Options

When you click Restore, you will see the following screen:

C Selective Mailbox Restore for bob.smith@ca4s	oftware.onmicrosoft.com
Sub Services selection and configuration 🏮	Restore Destination
Emails	 Restore to the original account Restore to another account
Contacts	
Tasks	Restore Type
	Non-destructive restore V
Calendars	Non-destructive restore
Notes	Replace restore Bypass restore
	of items to relevant folders.
	Cancel Next

Restore Destination

You will have the option of:

- Restoring to the original account
- Restoring to another account in the same domain.

Restore Type

Choose one of the following:

- Non-destructive restore: Existing data will remain as-is, and the restored data will be in a dedicated folder, preserving the original folder structure.
 - Use this option: to keep restored data separate, enabling manual drag & drop of items to relevant folders
- **Replace restore**: Restored content will be merged with existing data.
 - 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 restore: Restored content will be merged with existing data.
 - Deleted items and folders will be restored from the snapshot.
 - Existing items will be skipped.
 - Use this option: to restore deleted data

After you choose all of your **Restore** options, you can check the *Jobs* page to see the status of your job. See <u>Tracking Recovery Tasks on the Jobs Page</u> for details. When the restore is complete, you will receive a notification email.

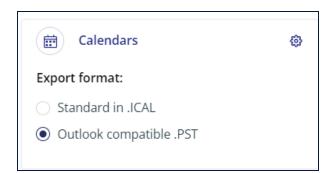
4.2.5 Export

Once you select one or more items, the **Export** button becomes active. Click **Export**.

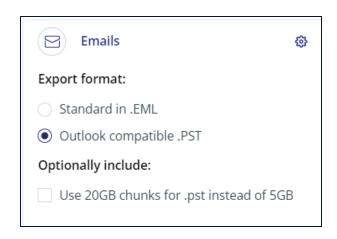
0						
Homepage	Browse Backup for "Full MS Exchange Backup" Homepage > Full MS Exchange Backup > Bob Smith					
geno Jobs	User Name Email Bob Smith bob.smith8	Ica4software.onmicrosoft.com	Last Backup 7 days ago	Total Size 6.58 MB	Backup Status	
Recovery	Jul 06, 2022 at 05:06 AM				Advanced Search C Restore	± Export
8 Activity	95 Emails	E 12 Tosks	I 392 Calendars	E Notes	1	
© Settings	Folders	From	Subject		Date 0	
	🖾 🖿 Inbox	Microsoft Viva	Your daily briefing		Jul 05. 2022 at 05:02 AM	v *
	Drafts	Jacob Anderson	Candidate for office manager position		Jul 04, 2022 at 01:28 PM	~
	Sent Items Deleted Items	Jessica Miller	Problem with the pepperoril order		Jul 04, 2022 at 01:22 PM	~
	🖉 🖿 Junk Email	Jessica Miller	Accepted: Weekly staff meeting		Jul 04, 2022 et 01:21 PM	~
	🖾 🖿 Archive	Jessica Miller	Getting multiple requests for gluten-free pizza		Jul 04, 2022 et 01:21 PM	~
	Conversation History	Alex Duglas	Pecorino and Romano		jul 04, 2022 at 01:17 PM	~
	Cutubx Cutubx Cutubx Cutubx	Alex Duglas	Re: Mozarella cheese order		jul 04, 2022 at 01:15 PM	
	• 🗷 🖿 (Restored emails) - backup 2022-06-01 08:13					
	• 💆 🖿 (Restored emails) - backup 2022-06-02 08:49	 Alex Duglas 	Mozzarella cheese order		Jul 04, 2022 at 01:13 PM	~
	Carl (Restored emails) - backup 2022-06-14 02:01 Carl (Restored emails) - backup 2022-06-29 08:09	Microsoft Outlook	Undeliverable: Weekly staff meeting		Jul 04, 2022 at 01:04 PM	~
	 Image: Control of the c	Microsoft Outlook	Undeliverable: Weekly staff meeting		Jul 04, 2022 at 01:02 PM	×
		Microsoft Viva	Your digest email		Jul 04, 2022 at 02:24 AM	~
		Microsoft Viva	Your digest email		Jun 20. 2022 at 02:40 AM	× .
© Support		1-30 of 79 items			Prev 1 2 3 Next	() Help

• When you export multiple sub-services, the format will be a single PST file.





- When you export a single sub-service, you can choose to customize the export format in the following ways.
 - If you click the settings icon next to the Email sub-service, you can choose the export format: EML or PST.
 - You can also choose to have larger, 20 GB .pst files, instead of 5 GB files.



- The settings icon next to calendars allows you to choose the format of the download file: iCAL or PST.
- The other option that you have when you export is to choose the destination: Amazon S3, Azure Blob, Box, DropBox, AWS S3 Compatible (if you are bringing your own storage), Google Cloud Platform, or a simple Zip file.



For download	\sim
For download	
My Amazon S3	
My Azure Blob	
My Box.com	
My Dropbox	
My AWS S3 compatible	
My Google Cloud Platform	

Note: The default "for download" option exports the file to your local storage device.

- Check the *Jobs* page to track the progress of your job. "Tracking Recovery Tasks on the Jobs Page" on page 80
- When the export is complete, click **Download Results**.

Full MS Exchange Bo Microsoft Exchange bob.smith@ca4software.onr		Export			Succeeded
Started at: Jul 12 2022 at 04:08 PM	Backup Date: jul 05 2022 at 05:02 AM	Initiator: bob.smith@ca4software.onmicrosoft.com	Destination: Direct Download	Total Items: 4	Size 12.14 KB
Cancel					Download Results View Log

A new page will open which will enable you to download your data file.



☐ Homepage	Jobs Johs > Download File(s)	
⊒ Jobs	Full MS Exchange Backup	
6	bob enthelia calcultures connectoration	
Recovery	File Name \diamond Size \diamond	Actions
8 Activity	bob smith_ca4software.com/icrosoft.com_Calendar_20220705020203_0.zip	0
(3) Settings		
1		
© Support		() Help
🔙 bob.	smith_ca4softzip	Show all X

4.2.6 Advanced Search

To perform a granular, keyword search, click Advanced Search.

٩						bob.smith@ca4software.onmicrosoft.com Bob Smith	Log Out 📑
Homepage	Browse Backup for "Full MS Exchange Bac Homepage > Full MS Exchange Backup > Bob Smit						
Jobs	User Name Bob Smith	Email bob.smith@ca4software.onmicrosoft.com		Last Backup 48 days ago	Total Size 6.58 MB	Backup Status	
Recovery	Jul 06, 2022 et 05:06 AM					Advanced Search C Restore	± Export
Activity	95 Emoils	Contacts	i 🔁 12 Tasks		: 392 Calendars	E Notes	1



You will see the following screen:

٩	
Homepage	Restore or download Microsoft Exchange Backup task: Exchange Backup EU Retore & Download > Exchange Backup EU > m.steward@cloudally.com
Jobs	Please select your preferred choice for restore O Via Snapshot ^
ے Activity	 ● Via Item Search ∨ ● M Email ○ g2 Contacts
Settings	 ✓ Tasks ✓ Calendars ✓ Motes
	Search for
	Continue

Enter your search criteria for any of these sub-services:

- Email Enter a keyword in the Search for field. For advanced search options, click and provide the following details in the drop-down form:
 - From: Enter a name or email address from which the email was received.
 - To: Enter a name or email address to which the email was sent.
 - **Subject**: Enter a keyword that matches any text in the email subject.
 - Date from / Date to: Enter the date range of the emails you would like to restore.
- **Contacts**: Enter a name in the Search for field.
- **Tasks**: Enter a keyword in the Search for field.
- **Calendars**: Enter a keyword in the Search for field. For advanced search options, click ~ and provide the following details in the drop-down form:
 - **Description**: Enter all or part of the event description.
 - **Owner**: Enter the user name or the email address
 - **Date from / Date to:** Enter the date range of the calendar you would like to restore.



4.3 How to Restore a Deleted Microsoft Exchange Mailbox

- 1. The Admin needs to recreate all users in the Active Directory that have been deleted.
- 2. The Admin needs to recreate their mailboxes. Alternatively, the Admin could restore to an existing user, but needs to ensure that the users have a license with a mailbox.
- 3. From the Homepage, locate the MS Exchange backup task you would like to restore, and then click the Recovery icon on the right.
- 4. Select one of the active mailboxes on the list, and click Next.
- 5. In the Full Mailbox Recovery box, click Restore, and then Next.
- 6. Choose the backup you want to restore.
 - a. First option: restore the Last Backup.
 - b. Second option: click Specific Backup Date and select a backup date immediately prior to when the mailbox was deleted.
- 7. Select which sub-services to restore, or accept the default of restoring all services (recommended).
- 8. Choose where to restore your backup to:
 - a. The default is to restore to the original account.
 - b. Alternatively, you could restore to a different account, provided it is within the same domain. Click that option, and select an account from the drop-down list.
- 9. Review the information on the confirmation screen. If the information is correct, click Next and then Restore to begin the recovery task. (If the information is not correct, click Cancel.)
- 10. Check the Jobs page to track the progress of your job. After the restore task completes, you will receive a Confirmation Report by email.
- 11. The restored data will be in a newly created "(Restored)" folder. After the recovery, move the recovered data back into the appropriate mailbox folders.



Note: For multiple MS Exchange mailboxes, please contact CloudAlly Support for assistance.

4.4

Using the Recovery Menu: Microsoft 365 OneDrive and Microsoft 365 SharePoint

Note: The screens below are from a OneDrive recovery, but the functionality is identical for SharePoint.

The Recovery Menu provides you with options at a fine granularity for selecting which sites 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.

٩			bob.smith@ca4software.onmicrosoft.com Bo	b Smith Log Out 📑
Homepage	Restor	e & Download		
Jobs	Active B	ackups		
G Recovery	Search			
<u>A</u> Activity	96	Microsoft Exchange 12 mailboxes MS Exchange Backup		>
Settings	TR	Microsoft Groups / Teams 8 groups / teams Groups/Teams backup		>
	\$	Microsoft SharePoint 11 sites Sharepoint Backup		>
	•	Microsoft OneDrive 8 sites OneDrive backup		>
(C) Support				() Help

2. Click the OneDrive or SharePoint backup task from which you wish to recover the data. The *Restore or Download Active Mailboxes* page is displayed.



			bob.smith@ca4software.onmicrosoft.com Bob Si
Sestore or download Micro	osoft OneDrive sites		
Listed below are the sites within your Mid	rosoft OneDrive domain backed up by C	loudAlly, ready for restore and c	ownload.
SITE	FIRST BACKUP	LAST BACKUP	ACTION
Search	× All ~		
/agata_brown_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/alex_duglas_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/bob_smith_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/charles_wilson_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/jacob_anderson_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/jessica_miller_ca4software_onmicrosoft_com	8 days ago	one day ago	>
/rosy_white_ca4software_onmicrosoft_com	8 days ago	one day ago	>
	8 days ago	one day ago	

This page displays all your OneDrive and SharePoint domains backed up with the details such as Site name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

- You can filter the list using the following options:
 - Filter by statuses such as All, Active, In Process, Not Active, Scheduled, Paused, Backed-up in another task, or Archived, from the drop-down list.
 - Or: search by part or all of the Site name.
- Click the > icon at the end of the line of the site which you want to restore or export (download).

The Restore or download Microsoft page is displayed.

٩	bob.smith@ca4software.onmicrosoft.com Bob Smi	th Log Out 📄
Homepage	Restore of download microsoft Oneprive Backup task. Oneprive - full backup	
Jobs	Please select your preferred choice for restore (a) Via Snapshot v Data changed from	
Activity	From Initial backup To Today	
settings	Via Item Search A	
	Continue	

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



4.4.1 Restore or Download Via Snapshot - OneDrive or SharePoint

- 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.

<u>⊑кт</u> Jobs	Restore or download from One Restore & Downlow- full tackup vasket/wave-my-sharepoint.com/personable From the archive list below select the relevant ite zip extract of the data.		ly to the online service, or "download" to create a
G Recovery	DATE	SERVICE	ACTION
8	Sep 6 2022 07:02 AM	Microsoft OneDrive	۹
Activity	Sep 5 2022 07:04 AM	Microsoft OneDrive	۹
6	Sep 4 2022 07:04 AM	Microsoft OneDrive	۹
Settings	Sep 3 2022 07:01 AM	Microsoft OneDrive	٩
	Sep 2 2022 07:00 AM	Microsoft OneDrive	٩
	Sep 1 2022 07:04 AM	Microsoft OneDrive	٩
	Aug 31 2022 07:04 AM	Microsoft OneDrive	٩
	Aug 30 2022 07:04 AM	Microsoft OneDrive	٩
	Aug 29 2022 04:32 PM	Microsoft OneDrive	Q
	 View 1 - 9 of 9 	<pre>« < Page 1 of 1 > >></pre>	,

- 3. Alternatively, you can click **Q** 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.

4.4.1.1 Restore - OneDrive or SharePoint

- 1. If you click **Restore**, the restore confirmation window appears, asking you about the following:
 - a. Do you want to restore to another tenant? If so, provide the email address of the administrator, the password, and the site to restore to.

Note: Tthe administrator should have read/write access to the destination



site, therefore we suggest using a Microsoft account that has a Global Admin or SharePoint Admin role.

- b. Do you want to perform a **non-destructive restore**, where the existing data will remain as-is, and the restored data will be in a dedicated folder, preserving the original folder structure? <u>Use this option</u> to keep restored data separate, enabling manual drag & drop of items to relevant folders.
- c. Or do you want to perform an **in-place restore**? You have three options for doing so:
 - Replace: the restored content will be merged with existing data. 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.
 - ii. Bypass: the restored content will be merged with existing data. Deleted items and folders will be restored from the snapshot. Existing items will be skipped. <u>Use this option</u>: to restore deleted data.
 - iii. Duplicate: the restored data will be duplicated in the same location as the existing data, with a suffix that indicates that it is a copy. (The suffix contains the year, month, day, hour, minutes, and seconds, e.g., 20230401000525.)
 Deleted items and folders will be restored from the snapshot.
 <u>Use this option</u>: to compare both versions of each file, to ensure the correct version is preserved.
- d. When you have completed the confirmation form, click OK.



Please confirm the restore request					
You are about to restore items from the archive of ca4software- my.sharepoint.com/personal/bob_smith_ca4software_onmicrosoft_co m					
• Restore to another tenant / Perform a cross site recovery					
Notice: If the endpoint and source are in different domains - permissions, site groups and users will not be restored.					
Please select your restore method:					
• Non-destructive: Data will be restored to a sub-site.					
In-place restore to the live site is also available, please select how you want to handle existing data:					
 Replace: Restore will overwrite existing live data. Bypass: Existing data will be bypassed and not restored. Duplicate: Existing data will be duplicated. 					
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 Recov</u>

A Note About OneNote

CloudAlly is able to back up and restore OneNote, both from within Sharepoint and within OneDrive. CloudAlly backs up and restores all content, except for the following items:

- Audio recordings (*.wav files)
- Images created with the Draw menu
- Tables
- Page color
- Rule lines
- Text styles (e.g., Headings, Normal, etc.)



- Attachments, except for image files, which are restored (Microsoft limitation)
- Tags

4.4.1.2 Export/Download - OneDrive or SharePoint

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

Please confirm the export request						
You are about to export iter ca4software- my.sharepoint.com/perso ware_onmicrosoft_com						
Export in .zip format:						
for download	~					
Optionally include: All deleted items A notification Email with a d to you upon completion.	ownload link will be sent					
Cancel	ОК					

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 ca4software- my.sharepoint.com/personal/bob_smith_ca4soft ware_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
1

- 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.

OneDrive - full b OneDrive /bob_smith_ca4soft	backup ware_onmicrosoft_com	Export			Succeeded
Started at: Sep 07 2022 at 03:44 PM	Backup Date: Sep 06 2022 at 07:02 AM	Initiator: bob.smith@ca4software.onmicrosoft	Destination: Direct Download	Total Items: 326	Size 409.19 KB
Cancel				Downloa	d Results View Log

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



٩		bob.smith@ca4software.onmicrosoft.com	Bob Smith	Log Out	₿
 Homepage	Jobs Jobs > Download File(s)				
Jobs	OneDrive - full backup całschware my sharepoint.com/personal/bob smith_całschware_omnicrosoft.com				
Recovery	File Name	Size	: _ /	Actions	
Activity	personal_bob_smith_ca4software_onmicrosoft_com_OneDrive_20220906640214_0.zip	409.19 KB		•	
Settings					
(C) Support			(() Help	
🥽 person	al_bob_smitzip			Show all	×

4.4.2 Restore or Download Via Item Search - OneDrive or SharePoint

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

(•	
Homepage Jobs	Restore or download Microsoft OneDrive Backup task: OneDrive - full backup Restore & Download >OneDrive - full backup >ca4software-my.starepoint.com/personal/bob_smith_ca4software_onmicrosoft.com Please select your preferred choice for restore
چ Recovery	○ Via Snapshot ▲
<u>Activity</u>	Via Item Search Search for
Settings	Author Enter a name Item name Enter a term that matches a part of the file name Date from From initial backup Date to Today Ctear Continue
Settings	Item name Enter a term that matches a part of the file name Date from From initial backup Date to Today



- 3. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as **Date**, **Subject**, and **Folder 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.

4.4.3 How to Restore Deleted SharePoint Collections

- 1. Recreate all of the deleted site Collections in Microsoft SharePoint.
- 2. Click Recovery from the Navigation Panel and then click on the SharePoint backup task.
- 3. Locate the Site Collection that you want to restore and then click the icon to the right of the site. The Restore or download page is displayed.
- 4. Select the Via Snapshot radio button
- 5. Enter the date range that you would like to select from, or just click Continue for a full list of backups.
- 6. Select the backup you want to recover the one closest to the date that all of your SharePoint data was deleted.
 - a. Scroll down to the bottom of the page, and click Restore.
 - b. From the pop-up dialog, click Replace: Restore will overwrite existing live data and then click OK.
 - c. Click Yes to the question about overwriting live data.

Note: You will receive an email notification when the restore is complete and can view the job status from the Jobs page.

4.4.4 How to Restore Deleted OneDrive Sites

1. Click Recovery from the Navigation Panel and then click on the OneDrive backup task.



- 2. Locate the Site that you want to restore and then click the icon to the right of the site. The Restore or download page is displayed.
- 3. Select the Via Snapshot radio button
- 4. Enter the date range that you would like to select from, or just click Continue for a full list of backups.
- 5. Select the backup you want to recover the one closest to the date that all of your OneDrive data was deleted.
 - a. Scroll down to the bottom of the page, and click Restore.
 - b. From the pop-up dialog, click Replace: Restore will overwrite existing live data and then click OK.
 - c. Click Yes to the question about overwriting live data.
 - **Note:** You will receive an email notification when the restore is complete and can view the job status from the Jobs page.

4.5 Using the Recovery Menu: Microsoft 365 Teams & Groups

The Recovery Menu provides you with options at a fine granularity for selecting which account, team or site 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.



٩			bob.smith@ca4software.onmicrosoft.com Bob Smith	Log Out 📑
Homepage	Resto	re & Download		
Jobs	Active	Backups		
© Recovery	Searc			
& Activity	96	Microsoft Exchange 12 mailboxes MS Exchange Backup		>
Settings	TR	Microsoft Groups / Teams 8 groups / teams Groups/Teams backup		>
	\$	Microsoft SharePoint 11 sites Sharepoint Backup		>
	-	Microsoft OneDrive 8 sites OneDrive backup		>
(C) Support				() Help

2. Click the Teams / Groups backup task from which you wish to recover the data. The *Restore or Download Microsoft 365 Active Mailboxes* page is displayed.

				bot	o.smith@ca4software.onmicrosoft.com Bob Smith	Log Out
	ore or download Micro	soft Groups / Teaı	ms			
	below are the active groups within y	our Microsoft Groups / Team	s domain backed up by Clou	udAlly, ready for restore	e and download.	
GRO	UP / TEAM	ТҮРЕ	FIRST BACKUP	LAST BACKUP	ACTION	
Sea	rch	🗙 All 🗸				
All Co	mpany	Group	26 days ago	one day ago	>	
All Co	mpany	Group	26 days ago	one day ago	>	
CA4 S	oftware	Team	26 days ago	one day ago	>	
Finan	ce	Team	26 days ago	one day ago	>	
Know	ledge share	Team	26 days ago	one day ago	>	
Mana	gement	Team	26 days ago	one day ago	>	
Mark	eting team	Group	26 days ago	one day ago	>	
Sales	team	Team	26 days ago	one day ago	>	
View	1 - 8 of 8		« < Page 1 of 1 > »			

This page displays all your Teams & Groups backed up with the details such as Team/Group name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

- You can filter the list using the following options:
 - Filter by statuses such as All, Active, In Process, Not Active, Scheduled, Paused, Backed-up in another task, or Archived, from the drop-down list.
 - Or: search by part or all of the Team/Group name.
- Click the > icon at the end of the line of the account, team or site which you want to restore or export (download).



The Restore or download Groups/Teams page is displayed.

٩				Bob.smith@ca4software.onmicrosoft.com Bob Smith	Log Out 📑
Homepage	Restore or download Microsoft (Groups / Teams Backup task: Groups/	Teams backup		
Jobs Recovery Activity Sectings	Please select your preferred choice for restore Via Snapshot ~ Data changed from From Initial backup ~ To To To				
	Via Item Search A				

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

4.5.1 Restore or Download Via Snapshot

See the instructions in "Restore or Download Via Snapshot."

4.5.1.1 Restore - Teams & Groups

1. If you click **Restore**, the restore confirmation window appears, asking for the group/team to which you would like to restore the data. Enter the address, and click **OK**.



Please confirm	n the restore requ	uest	×
You are about to r	restore items from the	archive of All Company	
Restore to	All Company	~	
*You can restore	the data to a different	group.	
A confirmation En	nail will be sent to you	upon completion.	
Can	cel	ОК	
·			

2. 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 "Tracking Recovery Tasks on the Jobs Page."

4.5.1.2 Export/Download - Teams & Groups

See the instructions in "Export/Download OneDrive or SharePoint."

4.5.2 Restore or Download Via Item Search - Teams & Groups

1. Select one of the following options:



٩	
Homepage	Restore or download Microsoft Groups / Teams Backup task: Groups/Teams backup Restore & Download - Groups/Teams backup - XAI Company
Jobs	Please select your preferred choice for restore
چ Recovery	O Via Snapshot A
8	⑥ Via Item Search ∨
Activity	O M Conversation
Ô	O 🗊 Site
Settings	Calendars
	O 📮 Channels
	Search for X
1	
	Continue

- Conversation: Enter a keyword in the Search for field.
- Site: Sites refer to the SharePoint site where Teams files are stored. Enter a keyword in the Search for field. For advanced search options, click the arrow and provide the following details in the drop-down form:
 - **Author**: Enter the name of the person who created the file in the Teams channel.
 - Item Name: Enter a term that matches part of the file name.
 - **Date from / Date to**: Enter the date range during which files were sent in the Teams channel.
- **Calendars**: Enter a search keyword in the Search for field. For advanced search options, click the arrow and provide the following details:
 - **Description**: Enter a keyword that matches part of the event description.
 - **Owner**: Enter a name or email address of the calendar owner.
 - Date from / Date to: Enter the date range of the calendars you would like to restore.
- **Channels**: Enter a search keyword in the Search for field. For advanced search options, click the arrow and provide the following details:
 - Date from / Date to: Enter the date range of the data you would like to restore.
 - Sender: Enter a name of the person who sent messages within that



channel.

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

4.6 How to Restore Deleted Teams Sites

Each of the deleted teams needs to be restored one at a time. If you need to restore a large number of teams, you can open a CloudAlly Support ticket to help with the restore process.

To restore a deleted Team:

First Step: Restore a Public Channel

Note: Private channels need to be exported and then restored.

- a. Click the Recovery element from the Navigation Panel. The Restore & Download page is displayed with all your active-backup account details.
- b. Click the Microsoft Groups/Teams backup task from which you wish to recover the data. The Restore or download Microsoft Groups & Teams page is displayed.
- c. Locate the Team (not the Group that will come later) that you would like, to restore. Click the arrow under the Action column to navigate to the Restore or Download
- d. Enter the appropriate date immediately before the Teams data was deleted, or simply click Continue without filling in the date fields to view all backups.
- e. Locate the most recent Channel backup prior to the ransomware attack and select it. Scroll down to the bottom of the page, click Restore, and then OK.





- f. Check the Jobs page to determine when the restore is complete.
- g. Click the Homepage element from the Navigation Panel, and then click on the Teams backup task to return to the Teams backup Click the CloudAlly refresh icon on the top-right of the screen in order to display the newly restored Team. You will need this in the following steps.

Note: Note: The refresh icon is not to be confused with the browser refresh button on the top left.



Second Step: Restore the Teams Sub-Services

Perform the following steps for each of these Teams sub-services in this order:

- 1. Sites
- 2. Calendars
- 3. Conversations
- 4. Metadata this will finalize the restore, by recovering the Members, Owners, and most importantly, the Team Name.

For each sub-service perform the following steps:

- 1. Click the Recovery element from the Navigation Panel, and then click the Microsoft Teams backup task from which you wish to recover the data.
- 2. Locate the most recent Team backup prior to the loss of your data. Click the arrow under the Action column to navigate to the Restore or Download



- 3. Locate the most recent Site, Calendar, Conversation, or Metadata (in that order) and select it. Scroll down to the bottom of the page and click
- 4. Click the Restore To field and select the (Restored) channel.
- 5. For Sites, select the "Replace: Restore will overwrite existing live data" option.
- 6. Click OK to complete the restore
- 7. Repeat these steps for the remaining sub-services.

4.6.1 How to Restore Deleted Groups

Groups are created by Microsoft when the Teams are created. When you restored the Channel, both the Team and the Group were created at the same time. Before you begin, verify that the Group was indeed created in Microsoft.

Note: If you want to restore a Group, it can only be restored into a Group; Teams are restored into Teams.

Perform the following steps for each of these Group sub-services in this order:

- 1. Sites
- 2. Calendars
- 3. Conversations
- 4. Metadata this will finalize the restore, by recovering the Members, Owners, and most importantly, the Group Name.

For each sub-service perform the following steps:

- 1. Click the **Recovery** element from the Navigation Panel, and then click the **Microsoft Groups** backup task from which you wish to recover the data.
- 2. Locate the most recent Group backup prior to the loss of your data. Click the arrow under the Action column to navigate to the Restore or Download
- 3. Locate the most recent Site, Calendar, Conversation, or Metadata (in that order) and select it. Scroll down to the bottom of the page and click
- 4. Click the **Restore To** field, a select the (Restored) channel.
- 5. For Sites, select the "Replace: Restore will overwrite existing live data" option.



- 6. Click OK to complete the restore
- 7. Repeat these steps for remaining sub-services.

4.7 Tracking Recovery Tasks on the Jobs Page

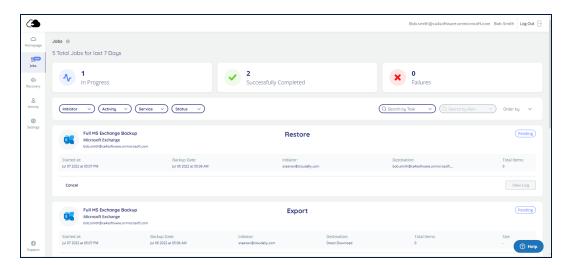
The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

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

From the Navigation pane, click Jobs.

4.7.1 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 failed over the past 7 days.



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



4.7.2 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:
 - Microsoft Exchange
 - Microsoft SharePoint
 - Microsoft Groups / Teams
 - Microsoft OneDrive
 - Google Workspace
 - Google Shared Drives
 - Salesforce
 - Box
 - Dropbox
 - Google Account
 - IMAP
- **Status**: Filter by one of the following:
 - In progress
 - Succeeded
 - Failed
 - Pending
 - Canceled
- Search by Task: Filter by a task, such as:
 - Microsoft Exchange
 - Teams/Groups
 - One Drive
 - SharePoint

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

4.7.3 Description of Each Job

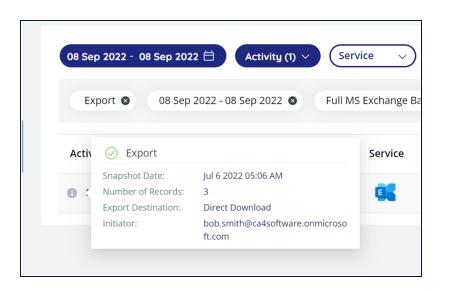
- The rest of the screen provides a detailed description of each individual job that you ran.
 - **Type of Job**: Export, or Restore this appears as a large title within each job description.
 - Name, Service, and Account of the job.
 - Start date, backup date, initiator, destination, total items backed 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.

08 Sep 2022 - 08	Sep 2022 🛱 🛛 Activity (1) 🗸	Service v St	atus 🗸		Q 👊 Full MS Ex	change >) (Q bob.smith@ca4s >) (C
Export O	08 Sep 2022 - 08 Sep 2022 🔇	Full MS Exchange Backup	bob.smith@	ca4software.onmicrosoft.com 🛛		<u>Clear Filters</u>
Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
Export	Sep 8 2022 12:31 PM	•	Notes	Succeeded	Full MS Exchange Backup / bob.smith@ca	bob.smith@ca4software.onmicrosoft.com

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 ③ 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:







5 Filtering and Viewing Drill-Down Details

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

5.1 Filtering by account, team or site

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

()		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
 Homepage	Homepage	
⊒ Jobs	4 Bockups	88 🖨
Recovery Activity	Image: Succeeded Microsoft Exchange Succeeded	Total Active Total Size Last Snapshot Next Backup Total Size Last Snapshot Next Backup
Ø Settings	Groups/Teams Backup ♪ ♂ TS Microsoft Groups / Teams Succeeded	Total ① Active ① Total Size Last Snapshot Next Backup ③ Recovery 9 8 390.41 KB 22 days ago In 9 hours ⑦ Backup How Image: Comparison of the standard How
	Sharepoint Backup @ Microsoft SharePoint Succeeded	Total I Active I Total Size Last Snapshot Next Backup Image: Constraint of the start of the
	OneDrive Backup # # Microsoft OneDrive Succeeded	Total ● Active ● Total Size Last Snapshot Next Backup ● Recvery 8 8 12.09 MB 22 days ago In 14 hours ♀ Backup How
		_
(D) Support		() ныр

2. Click the Microsoft 365 icon from the list or enter a keyword in the Search field to find a specific task. The *Microsoft 365 Backup* page is displayed.

The *Microsoft 365 Backup* page displays all the Microsoft 365 account, team or sites available for the administrator account you are using. The page displays the details such as Mailbox name, Email, Status, Backup Size, and Last Backup dateGroup/Team Name, Type (Group or Team), Tags, Status, Backup Size, and Last Backup date. It also provides the means to filter and control the associated backup tasks.



5.1.1 Filtering Using Names or Statuses

You can filter accounts using the following options:

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

5.1.2 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 account, team or site that belong to Managers, or all those that belong to the Sales Team.

You can use tags to quickly filter your list of account, team or sites.

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

- 1. Select at least one account, team or site.
- 2. Click **Tags**, and the following screen appears.



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

5.1.3 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.



Microsoft 365 User Guide Filtering and Viewing Drill-Down Details

New Tag		
Please enter a new tag name		
	Cancel	Create

2. Enter a new tag name and click Create.

To apply tags to your account, team or sites:

- 1. Select at least one account, team or site.
- 2. Click Tag.
- 3. Choose the desired tag for your account, team or site s.
- 4. Click Apply.

5.1.4 Filtering by Tag

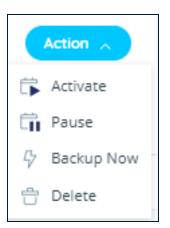
In the **Filter by tag** field, enter a tag name. The accounts, teams or sites with those tags will appear.

O Homepage	Full MS Exchange Backup 🖋 Homepage > Full MS Exchange Backup							
Jobs								٢
6								
Recovery Activity	3 of 12 Total Mailboxes Active Paused Archived						۵ (+
© Settings	O Search by account name or email	\Xi (Manager X			Status	▼ Tags ∨	Action	
	□ ∨ Mailbox	0 Email	0 Tags	Status 0	Backup Size 🔅	Last Backup 🔅	Actions	
	Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Manager		703.74 KB	one day ago	⊙ ⊗	~
	Bob Smith	bob.smith@ca4software.onmicrosoft.com	Manager		6.58 MB	one day ago	68	~
	Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	Manager		551.02 KB	one day ago	6 8	~

5.1.5 Actions

To perform actions on a account, team or site, 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 account, team or sites.
- **Pause** halts the backup procedures on the selected account, team or sites.
- 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 account, team or sites.

5.2 Viewing Backup Statistics with the Drill-down Feature

Select an account, team or site, and click the \checkmark button on the right-hand side of the row. This option enables you to drill down to the backup history dashboard.

Max Steward		steward@cloudally.com			 Success 	62.35 MB	15 hours ago	5 🛱 9
06/02	07/02 08/02 09/02	10/02 11/0	2 12/02 13/0)2 14/02	15/02 16/02	17/02	20/02 S Emails Calendars Tasks	182 new 55 new 0/02 92 new
亡 Calendar: Items: 55 ①	Success 🥝 20/02/2022 at 08:04 AM	Notes Items: N/A 2	Success 🔗	Tasks Terms: 92	Success 🤕 20/02/2022 at 08:06 Af			Success 🥑 //2022 at 08:08 AM
Emails	Success 🥝 20/02/2022 at 08:04 AM							

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



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.



6 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.

6.1 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
(S) Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
ے Activity		
දියු Settings		



6.1.1 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		
දි දු 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.

Homepage A	Activity Activity > System activity						
Jobs	(Stort date · End date ⊟) (Activity · ∨) (Service · ∨) (Status · ∨)			Q Search by Task name V Q Search items. V 🕑			
Recovery	Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
& Activity	Export	Jul 12 2022 04:08 PM	86	Calendars	 Succeeded 	Full MS Exchange Backup / bob.smith@ca	bob.smith@ca4software.onmicrosoft.com
(2) Settings	Backup	Jul 11 2022 01:01 PM	5		Succeeded	Sharepoint backup	/sites/AltaroRestored_Shared_mailbox_20 21_08_31_11_05
	Export	Jul 11 2022 01:00 PM	T	Channels	Succeeded	Full Teams Backup / AltaroRestored_Lind	AltaroRestored_Linda_Fuller_2021_08_31_0
	() Restore	Jul 11 2022 01:00 PM	۲		Succeeded	One Drive / cloudally1-my.sharepoint.co	/2sepo_kazandev_pro
	Backup	Jul 11 2022 05:04 AM	86	Calendars	S 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	88	Notes	Succeeded	Full MS Exchange Backup	Agata.Brown@ca4software.onmicrosoft.co m
	Backup	Jul 6 2022 05:06 AM	30	Notes	Succeeded	Full MS Exchange Backup	Alex.Duglas@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	88	Notes	Succeeded	Full MS Exchange Backup	Sarah Johnson@ca4software.onmicrosoft.c om
0	Backup	Jul 6 2022 05:06 AM	86	Notes	 Succeeded 	Full MS Exchange Backup	Jessica.Miller@ca4software.onmicrosoft.co m
Support	Backup	Jul 6 2022 05:06 AM		Notes	Succeeded	Full MS Exchange Backup	Charles.Wilson@ca4software.onmicrosoft.



0	🕗 Backup	
0	Execution Time: Data Size:	Mar 1 2022 12:29 PM 5.97 MB
	Description:	Mail Completed (adam.smith@onmicrosoft.com, 80 items, 720 Bytes delta data size, 0 minutes.)

6.1.2 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.

Activity Activity > Security audit						
Show: From:	∨ То:	V User Activity:	All ~	Status: All V Re	set	Export
Date	User Activity	Service	Status	Task	Performed By	Description
Mar 7 2022 03:28 PM	Sign-in		Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Native Sign in (OK) Chrome from ip 10.4.5.60
Mar 3 2022 05:46 PM	Sign-in		Completed	adam.smith@cloudally.com	m.steward@cloudally.com	Native Sign in (OK) Chrome from ip 10.6.0.50
Mar 3 2022 01:21 AM	Sign-in		Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Native Sign in (OK) Chrome from ip 10.6.0.50
Mar 2 2022 06:44 PM	Notification	MS Exchange	Completed	Adam Smith	adam.smith@cloudally.com	Backup Now was initiated for account AArtur
Mar 2 2022 06:44 PM	Sign-in		Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Native Sign in (OK) Chrome from ip 10.6.0.50
Mar 2 2022 06:04 PM	Sign-in		Completed	adam.smith@cloudally.com	m.steward@cloudally.com	Native Sign in (OK) Chrome from ip 186.45.3
Mar 2 2022 01:41 PM	Notification	MS Exchange	Completed	Adam Smith	adam.smith@cloudally.com	Backup Now was initiated for account dror@
Mar 2 2022 01:41 PM	Notification	MS Exchange	Completed	Adam Smith	adam.smith@cloudally.com	Task cancellation request received.
Mar 2 2022 01:40 PM	Notification	MS Exchange	Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Backup Now was initiated for account 3SEPO
Mar 2 2022 01:39 PM	Sign-in		Completed	adam.smith@cloudally.com	m.steward@cloudally.com	Native Sign in (OK) Chrome from ip 186.45.3
Mar 2 2022 11:50 AM	Notification	MS Exchange (Email)	Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Mail: Restore Task for account dror@cloudall
Mar 2 2022 11:47 AM	Notification	MS Exchange (Email)	Completed	Max / adam.smith@cloudally.com	adam.smith@cloudally.com	Mail: Download Task for account dror@clou
Mar 2 2022 11:36 AM	Sign-in		Completed	m.steward@cloudally.com	adam.smith@cloudally.com	Native Sign in (OK) Chrome from ip10.6.0.50
Mar 1 2022 11:47 AM	Sign-in		Completed	m.steward@cloudally.com	m.steward@cloudally.com	Native Sign in (OK) Chrome from ip 124.162

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





6.2 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

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

 Homepage	Settings			
Jobs	Account	User Management	Security	Notifications
Recovery	ર્દ્રેટેર	Ŝ	\bigcirc	\bigcirc
Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications
8 Activity				
Settings				

6.2.1 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.



Microsoft 365 User Guide Managing Your Account

Settings Settings > Account		
Account Name	Max Steward	
Email	m.steward@cloudally.com	
Data Center Location	US East (Northern Virginia)	
		SAVE Cancel
To terminate your C	loudAlly subscription, click on the REMOVE ACCOUNT button.	
This includes removing all	your data at CloudAlly	
I approve the removal	of my data from CloudAlly	
		REMOVE ACCOUNT

- 1. You can update the Account Name and/or Email.
- 2. Click **SAVE**.

6.2.2 Canceling Your CloudAlly Subscription

To cancel your subscription:

- 1. Select the check adjacent to the "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.

Are you sure?	Х
l approve the removal of my data from CloudAlly	
	YES NO

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, data from all your backups will be deleted.



6.3 User Management

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

ttings > User Management				
e following external creden	tials are currently linke	ed to your CloudAlly account		
u can remove the credentials anytir	ne if you prefer to use only ye	our CloudAlly sign-in credentials		
				+ Add new us
Email	Туре	2FA Authentication		
m.steward@cloudally.com	Email	۲		
j_armstrong@cloudally.com	Email	۲	08	
kristen_hall@cloudally.com	Email	۲	0 8	
		Page 1 of 1		Showing 1-3 of 3

Click + Add new user to create a new user and start the configuration procedure for that user, or ? to edit an existing user's settings. The settings include the operations permitted to the user and the list of available services:

Note: Selecting the role "Administrator" enables permissions to all services and operations.



Microsoft 365 User Guide Managing Your Account

mail:	m.steward@cloudally.com	Type:	Email	~	
assword		Role	Custom	~	
Operations		~ Services			
General		All			
View Account settin	ng page 🕕	Microsoft	Exchange		
View billing page ar	nd manage payment details 🕕	Microsoft	Groups / Teams		
View support page	θ	Microsoft	SharePoint		
View account activit	ty 🕕	Microsoft	DneDrive		
Show all your supp	ort tickets	Google Ac	count		
Manage Notifications		Salesforce			
View backups page 🕕		Dropbox	Dropbox		
Backup Tasks		Box	Box		
🗌 Activate new backup tasks 🚯		Google Wo	Google Workspace		
Modify backup tasks 🚯		Google Sh	ared Drives		
Delete backup task		IMAP			
Pause backup tasks					
Execute backup tas					
Cancel backup task					
View backups tasks					
Preview backed up	data				
Restore backups					
Export backups					
Delete backup Item	is - GDPR Right to Erasure				

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

6.4 Security Settings

The Security Settings page enables you to:



- Update your password
- Set up two-factor authentication

The bottom section allows you to enforce certain security policies for your users' accounts.

Enforce The Following Password Policies On All Users If Enforce Two-Factor Authentication on all users Password Expiration: Password Ex		
	Cancel	Save



- With the Enforce Two-Factor Authentication option, you can make twofactor 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.

6.4.1 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.

Current Password:	
Confirm New Password:	
	SAVE Cancel

- 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.



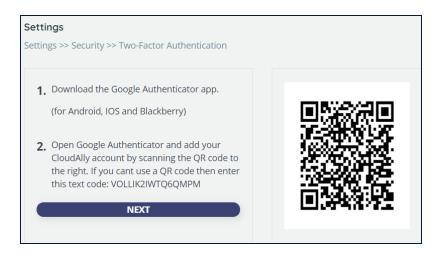
6.4.2 Two-Factor Authentication

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.



- 7. Download an Authenticator app, depending on your platform.
- 8. Open the Authenticator app and add your account by scanning the QR code provided in the web application.
- 9. If you cannot use a QR code, then enter the text code provided in the web application.
- 10. A six-digit code is generated.
- 11. Click **NEXT**.
- 12. Enter the 6-digit code that the application generated.
- 13. 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.



6.4.3 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.

To set up Okta:

- 1. On the **Settings** > **Security** > **SAML** tab, add the URL to the SAML Identity Provider Metadata file.
- 2. Or, you can upload the file itself.
- 3. Click Activate.



For further instructions, see the CloudAlly Okta User Guide.

6.4.4 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 CloudAlly 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**.

٩		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
 Homepage	Settings Settings > Security	Email & Password: Active
Jobs	Password IP Restrictions SAML	
(S) Recovery	IP Address Restrictions Settings	Your IP Address: 79.182.47.197
<u>A</u> ctivity	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 blocked. You can define alingle IP address or a range of IP addresses. Only IPV4 is accepted.	
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
@ Support		() Help

2. Click + Add IP Address.

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



	New IP Address	5 	Your IP Address: 1	50.246.112.29
Enter I	P Address descriptior	1	(optiona	al)
e.g. O	ffice			
You ca	n add one or more ll	Paddresses, or a ran	ge of IP addresses:	
Tr	usted IP Address(es)			
Se	parate multiple IP addre	sses with ",".		
Ex	ample 192.168.10.5			
) Tr	usted IP Address Ran	ige		
Fn	om	То		
_	ample 192.168.10.0 - 192	2.168.10.255		

b. Or, enter a one or more ranges of contiguous addresses, and an optional description. Multiple ranges could be used to accomodate 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 a	ddresses:
Trusted IP Address(es)	
Separate multiple IP addresses with ",".	
	11
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.



3		username⊜cloudi	ally.com Jon Doe Log Out 📄
	Security Settings Settings > Security		Email & Password: Active
Recovery	Password SAM	L IP Restrictions	
Billing	IP Address Restrictio	ons Settings	Your IP Address: 130.248.112.29
8 Security	Once you have configure a se	ryou to control who can access your account based on their IP address. et of trusted IP addresses and enable IP Address restrictions, any user attempting to log in via an IP address that is not trusted will dress or a range of IP addresses. Only IP-vi sa accepted.	be blocked.
() Settings	CAUTION: Make sure to add yo	our 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
	Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	1
(C) Support			

You can edit your list of addresses by clicking \mathcal{P} , or delete ones that you no longer want on your trusted list by clicking \bigcirc .

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:

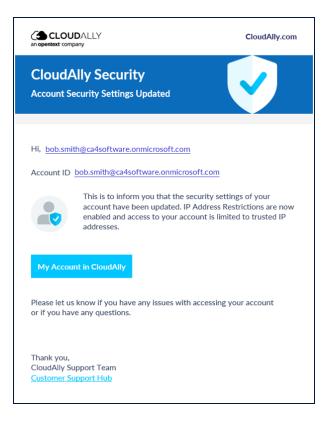


	- Home FreeTital 🙎 Leg In
Sign In to your Account Don't have an account? Sign up	
bob.smith@ca4software.onmicrosoft.com	
	ø
forgotutoutues moult Access denied.	
Sugarite Cr	
G Sign in with Google)
Sign in with Microsoft)
O Sign in with Okta]
Terms of Service and Privacy Statement powered by aws	



6.4.5 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.



6.5 Notifications Settings

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



Homepage	Settings			
Jobs	Account	User Management	Security	Notifications
Recovery	0 	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	\bigcirc	<u> </u>
8 Activity	Manage account settings	Manage other users	Manage security settings	Manage system notifications
🔅 Settings				·

The following screen will appear:

tings > Notifications							
Summary Report							
Backup tasks overview	Preview						
Backup failure details	Preview			eport Frequency: Once A Day 🛛 🗸			
Provide as:							
O CSV Attachment				Send the report only in ca	ise of backup failure		
Ownload Link							
							SAVE
nd Notifications To:						+	Add new recip
Email	Display Name	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts (i)	Action
	Max Steward	1	✓	✓	✓	✓	08
m.steward@cloudally.com							

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
 - d. Auto Discovery Notification
 - e. Smart Alerts
- 4. Click **SAVE** to create the new recipient. You may need to scroll to the bottom of the page to find **SAVE**.

Settings Settings > Notifications > Net	w Email report			
User Info Email			Display Name	
Notifications Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification Smart Aler	ts
				SAVE Cancel



7 Managing Subscriptions and Payments

7.1 Subscribing to CloudAlly

Once the trial period has ended, you need to subscribe to the CloudAlly service 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.

7.1.1 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. After you are charged each month, a receipt will be emailed to you.

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 payment status is updated every 24 hours, so if you update your credit card details but the reminder is still there, check again tomorrow.

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.

7.1.2 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 payment status is updated every 24 hours, so if you update your credit card details but the reminder is still there, check again tomorrow.

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.

7.2 Payment Details

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The Payment Details page contains the information used for billing.

7.2.1 Monthly Subscriptions

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

7.2.1.1 Add New Card

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

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.



7.2.1.2 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.

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

4. Scroll down for 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.

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

At the bottom of the page, 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.



7.2.2 Annual Subscriptions

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



7.3 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.

If you have neglected to pay your annual subscription, the status will look like this:

You can click to download the invoice, or you can click to receive an email version of your invoice, with the option to pay online either by PayPal or credit card.

Monthly

Similarly, if you neglected to pay your monthly subscription fee, the status will look as follows:

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



7.4 History

This page displays the history of payments.

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.

7.5 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**.
- 2. For an existing user, click the pencil icon to the right of 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.



8 Helpful Resources

8.1 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.

8.2 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.

8.3 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>

8.4 Privacy

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

8.5 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/



9 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.

CLOUDALLY CUSTOMER SUPPORT HUB	← Back to CloudAlly	Free Trial	Open a Ticket	Sign in Partner Sign in
	How can we help?			
Search this help center			Q	
	🏟 SharePoint 🗠 OneDrive XXX 🔮 😵 Dropbox	G Suite		
	ere to help you t team is available 24 hrs 365 Day			

CloudAlly provides multi-channel support options:

Phone Numbers:

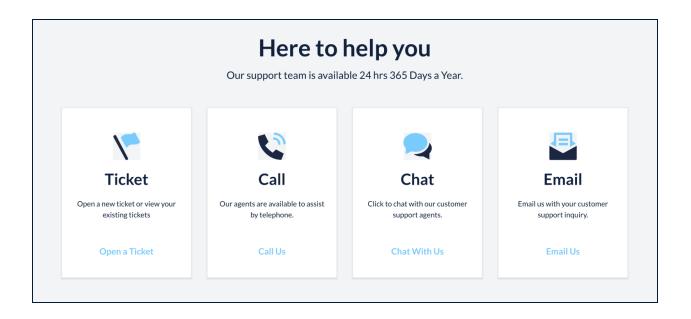
USA: +1 (424) 304-1959 AU: +61 2 8599 2233 UK: +44 114 303 2758

Email Addresses:

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

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.

