

User Guide

Microsoft 365 Backup & Recovery



MS 365 CE 24.1.1

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1 Preface

1.1 About this Guide

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

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

1.2 Audience

This guide is intended for individuals who administer CloudAlly for Microsoft 365.

1.3 What's in this Guide

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

- [Creating and Accessing Your Backup Account](#)
- [Backing Up Your MS 365 Data](#)
- [Recovering Your Backed Up Data](#)
- [Filtering and Viewing Drill-Down Details](#)
- [Managing Your Account](#)
- [Managing Subscriptions and Payments](#)

2 Creating and Accessing Your Backup Account

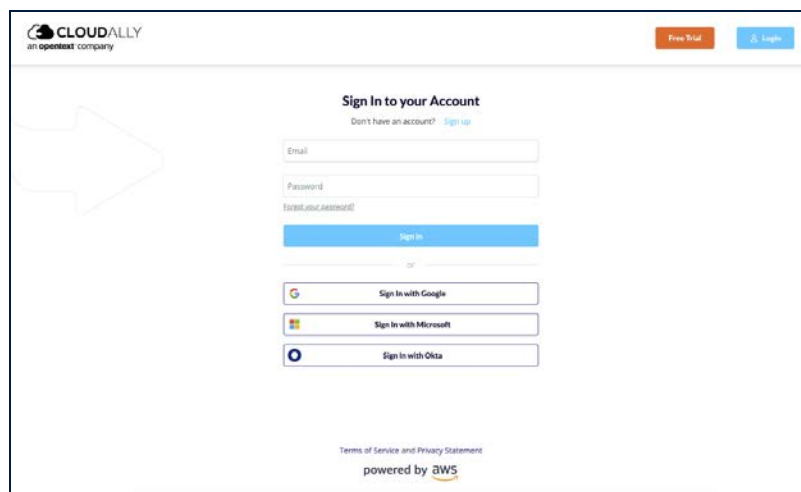
2.1 Prerequisites

To administer the backup for the Microsoft 365 environment, the following is required:

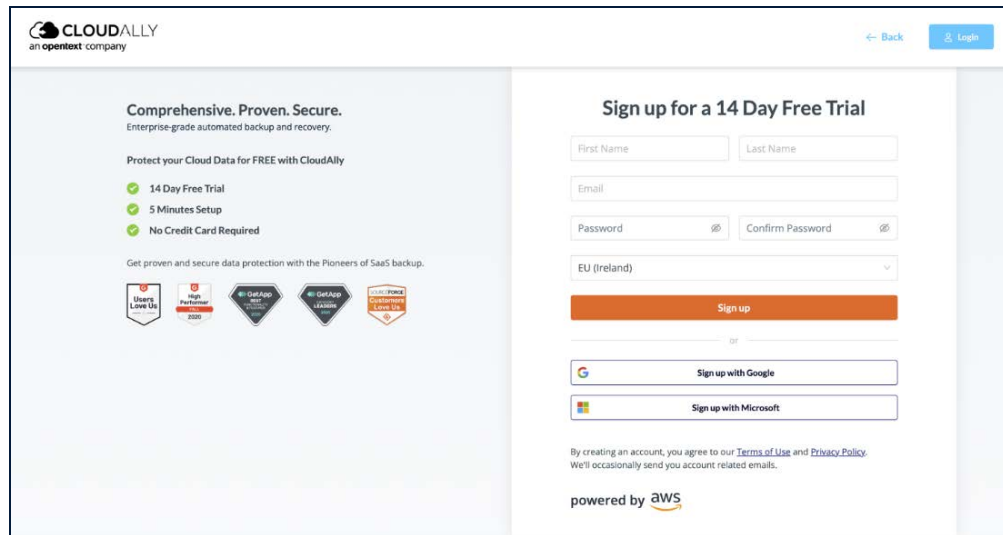
- Microsoft license
- Global Administrator account in Microsoft Office - online version

2.2 Sign Up/Sign In from the CloudAlly Home Page

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



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



4. Complete the form, and then click Sign up.

Note: CloudAlly gives you the choice of numerous AWS data centers available in the dropdown menu “Location.” These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, South Africa, and Japan. The ability to choose from a wide range of data centers helps our customers comply with local data sovereignty laws that regulate the physical location and movement of data. In addition, we also offer a “Bring Your Own Storage” (BYOS) option on request. This allows you to backup sensitive data in your own AWS S3 buckets, S3 compatible storage service, Azure, or Google Cloud Platform. Please contact support@cloudally.com for more information.

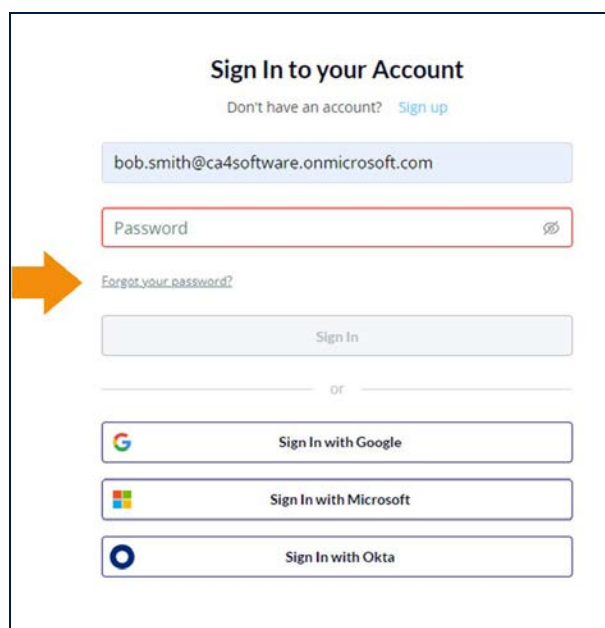
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your account.

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

2.3 Resetting Your Password

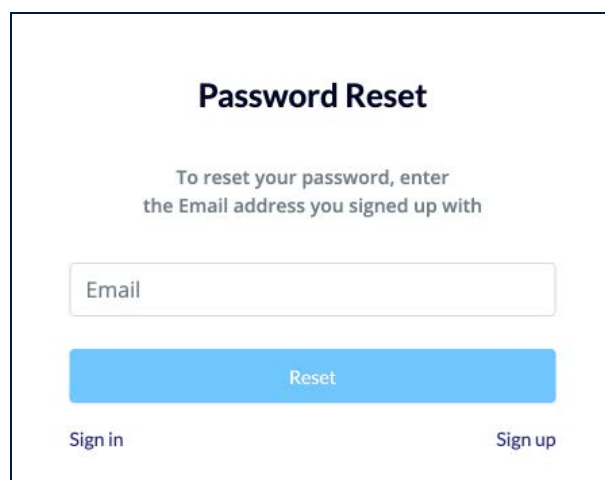
If you do not remember your password, you can easily reset it using the **Password Reset** function.

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



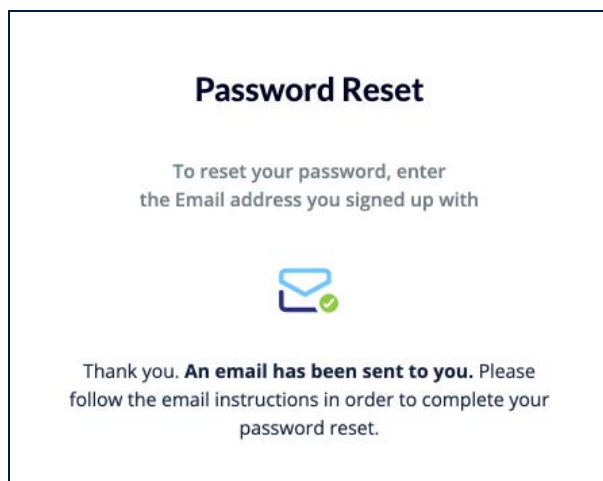
The screenshot shows the 'Sign In to your Account' page. At the top, it says 'Sign In to your Account' with a link 'Don't have an account? Sign up'. Below this is a text input field containing 'bob.smith@ca4software.onmicrosoft.com'. Underneath is a password input field with a red border and a 'Show/Hide' icon. To the left of the password field, an orange arrow points to the link 'Forgot your password?'. Below the password field is a 'Sign In' button. Further down, there are three social login options: 'Sign In with Google', 'Sign In with Microsoft', and 'Sign In with Okta'.

2. The *Password Reset* page will appear.

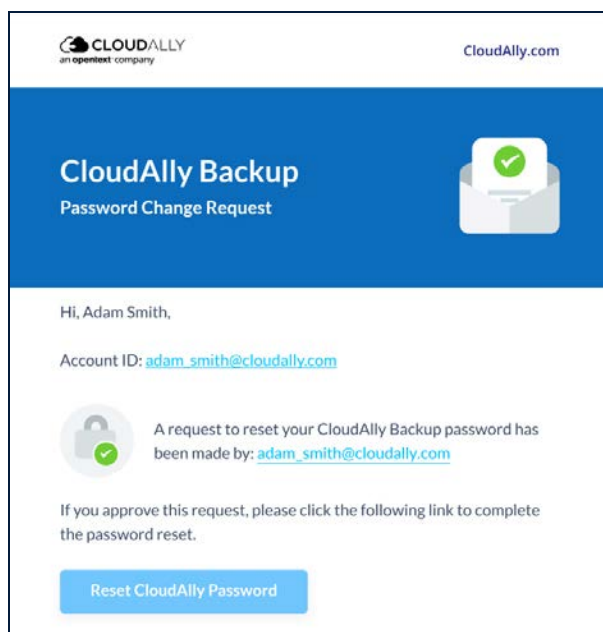


The screenshot shows the 'Password Reset' page. It has the heading 'Password Reset' and the instruction 'To reset your password, enter the Email address you signed up with'. Below this is an 'Email' input field. Underneath the input field is a blue 'Reset' button. At the bottom of the page, there are two links: 'Sign in' on the left and 'Sign up' on the right.

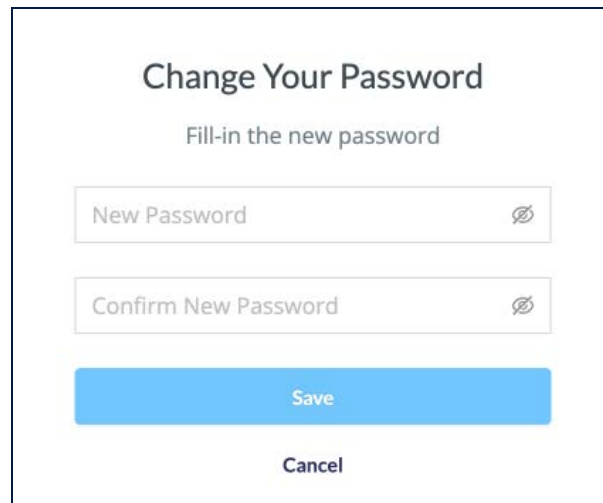
3. In the Email field, enter the email address that you used to sign up.
4. Click **Reset**, and the *Password Reset* window will appear.



The email will look as follows:



5. In the email, 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

Confirm New Password

Save

Cancel

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

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

3 Backing Up Your 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's 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)

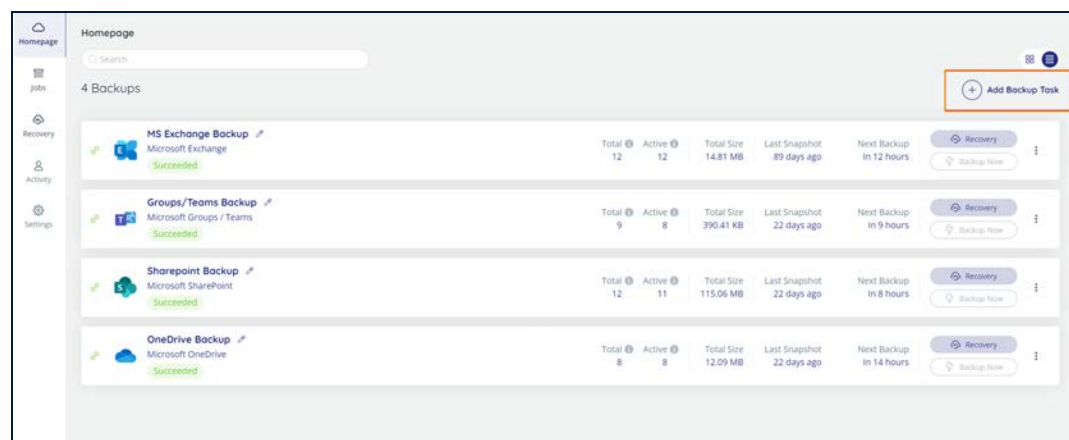
With a few simple clicks, you can activate backups for all or selected users.

3.1 Microsoft 365 Exchange

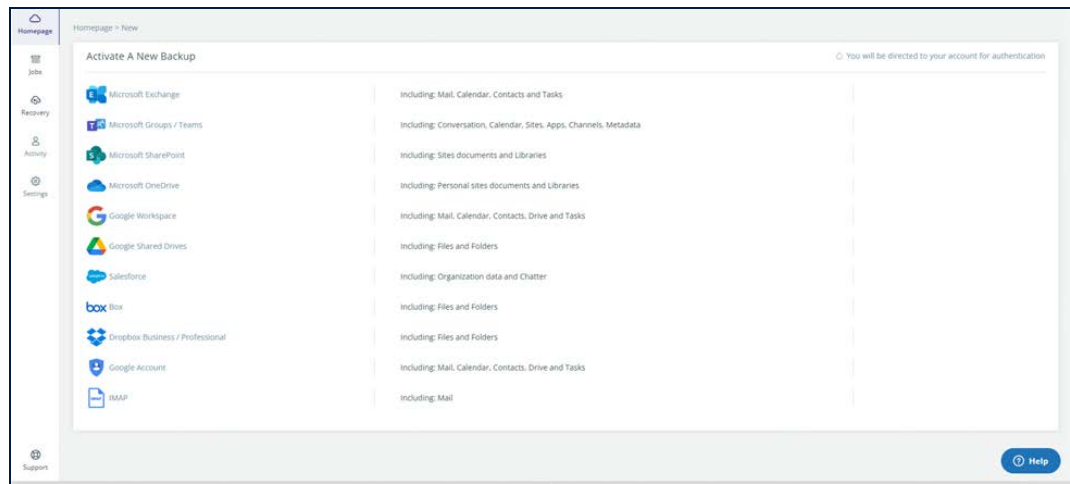
3.1.1 Creating a New Backup Task

To create a new 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**.



The *Activate A New Backup* page is displayed:



3. Click the name of the service you would like to back up, in this case: Microsoft Exchange.

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.

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

3.1.2 Configuring a Backup Task: Microsoft Exchange

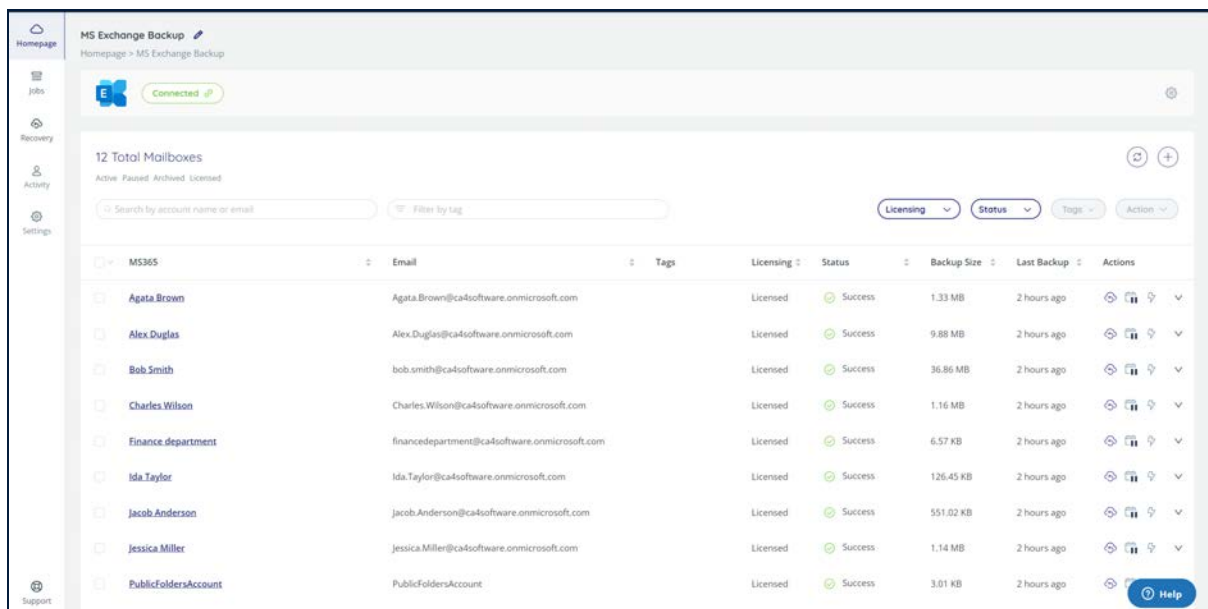
This set of options enables you to select the backup settings for the account, team or site. Click the gear-shaped settings icon.

The screenshot shows the 'Test Backup' settings page for Microsoft Exchange. It includes a header with a pencil icon (1) and a 'Connected' status (2). The 'Backup Settings' section contains several options: 'Index all data for Search' (3), 'Backup Unlicensed accounts' (4), 'Retain auto-archived backups for' (5), 'Automatically activate new mailboxes' (6), and a 'Bulk Activation and Management' section with a 'Create a new Activation Rule' button (7). The 'Backup Datacenter' is set to 'EU (Ireland)' (8) and the 'Retention Period' is 'Unlimited'. The 'Backup Frequency' is 'Daily' (9) and the 'Backup Hour (UTC)' is '23:00'.

1. You can change the name of the backup task by clicking the pencil icon.
2. The Connected / Disconnected icon indicates 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 Connected icon changes to the Disconnected icon. 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.

4. In the Microsoft Exchange system, accounts can have a Microsoft “Unlicensed” status (not to be confused with “Unlicensed CloudAlly product”). These can be the external accounts invited by users with an active license, accounts automatically generated for shared file storage, etc. Check the Backup Task page to see which accounts are MS licensed and unlicensed.



MS365	Email	Tags	Licensing	Status	Backup Size	Last Backup	Actions
Agata Brown	Agata.Brown@ca4software.onmicrosoft.com		Licensed	Success	1.33 MB	2 hours ago	
Alex Duglas	Alex.Duglas@ca4software.onmicrosoft.com		Licensed	Success	9.88 MB	2 hours ago	
Bob Smith	bob.smith@ca4software.onmicrosoft.com		Licensed	Success	36.86 MB	2 hours ago	
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com		Licensed	Success	1.16 MB	2 hours ago	
Finance department	financedepartment@ca4software.onmicrosoft.com		Licensed	Success	6.57 KB	2 hours ago	
Ida Taylor	Ida.Taylor@ca4software.onmicrosoft.com		Licensed	Success	126.45 KB	2 hours ago	
Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com		Licensed	Success	551.02 KB	2 hours ago	
Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com		Licensed	Success	1.14 MB	2 hours ago	
PublicFoldersAccount	PublicFoldersAccount		Licensed	Success	3.01 KB	2 hours ago	

Note: “Unlicensed” accounts have limited permissions, and we don’t advise using “Unlicensed” administrator accounts.

5. Backups are automatically archived when an entire account is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be automatically 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 Datacenter** and **Retention Period** fields are “display only,” and their values can’t be changed here.

8. The **Backup Datacenter** field displays the Datacenter 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 datacenter cannot be changed once it's been set during the account setup process. Contact Support if you need to move backups to a different geographic region, or if you'd like more information on our “Bring Your Own Storage” (BYOS) option.

10. Backup Frequency and Backup Hour

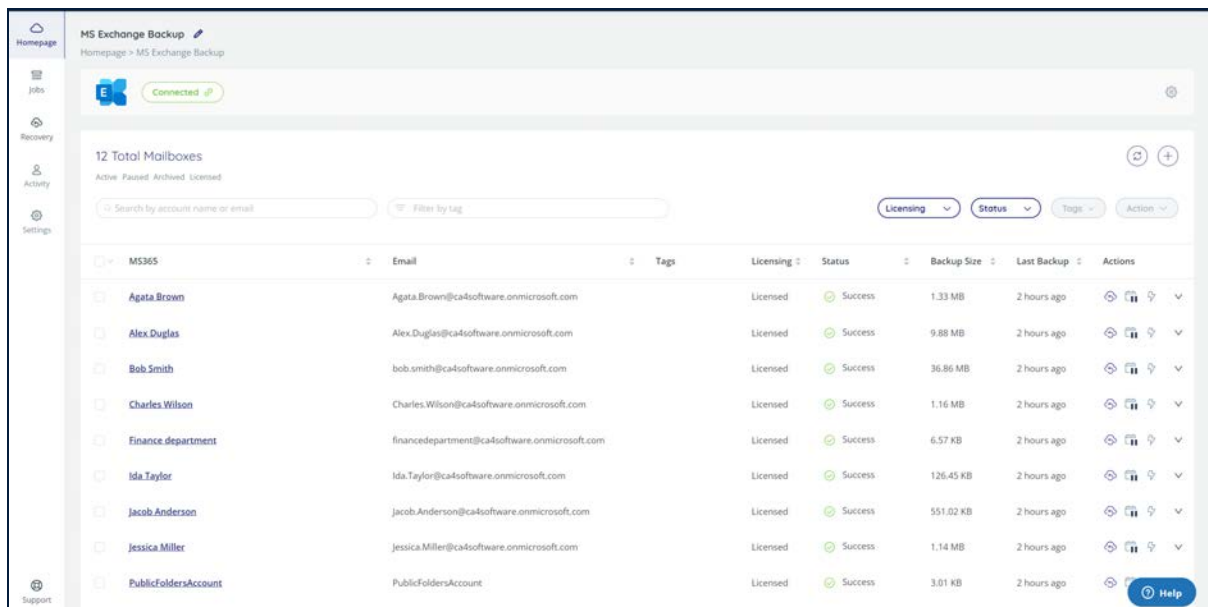
- a. Click the drop-down list of the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 Days
 - iii. Weekly
 - iv. 3 times a day - contact CloudAlly to enable this option.
- b. Click the drop-down list of the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

3.1.3 Activating Your Backups

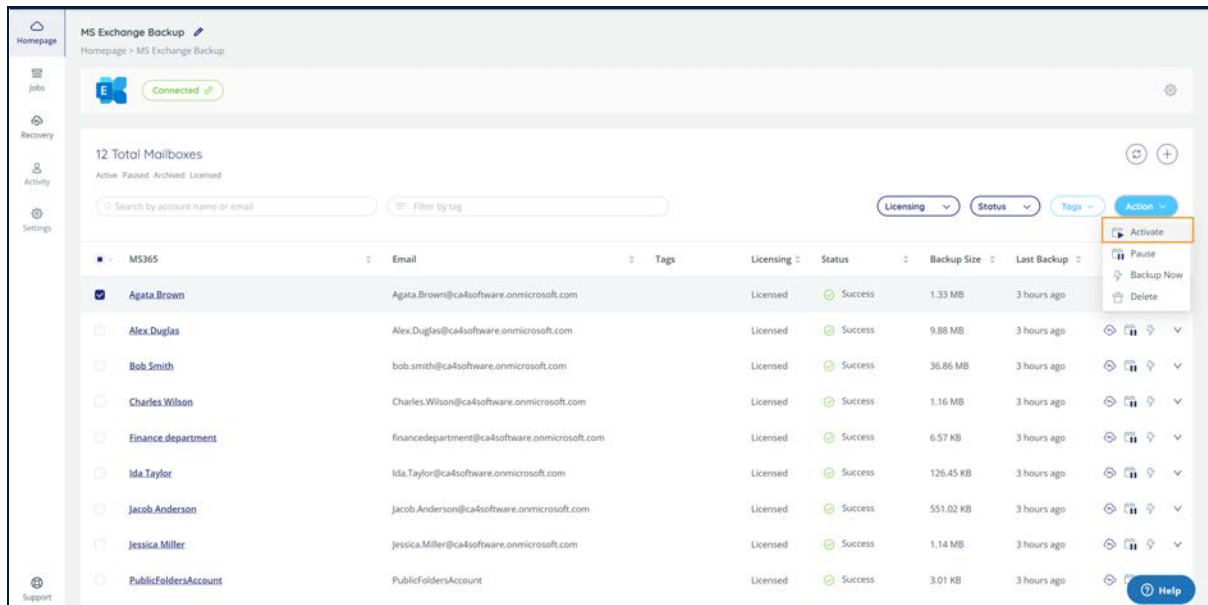
Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

1. Navigate to the list of account, team or sites following the Backup Settings section.

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

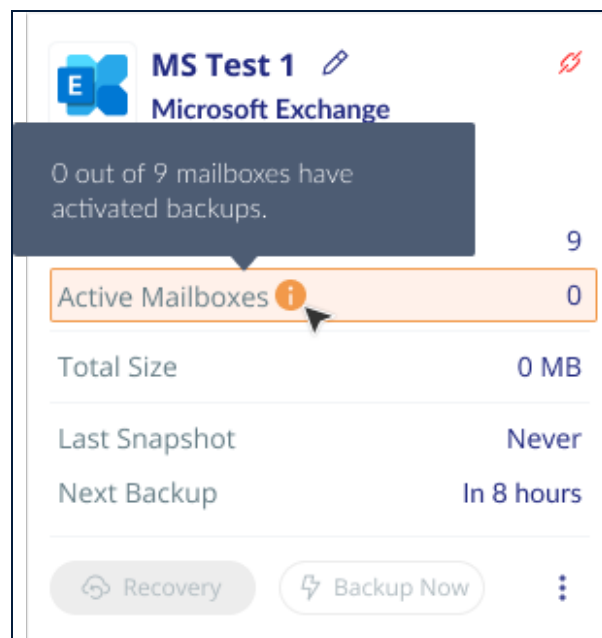


2. Select one or more account, team or site(s).
3. Click **Action** > **Activate**. The status of your backups will now be "Scheduled." This means that they will be backed up at the time that you selected on the *Configuration* screen.



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

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

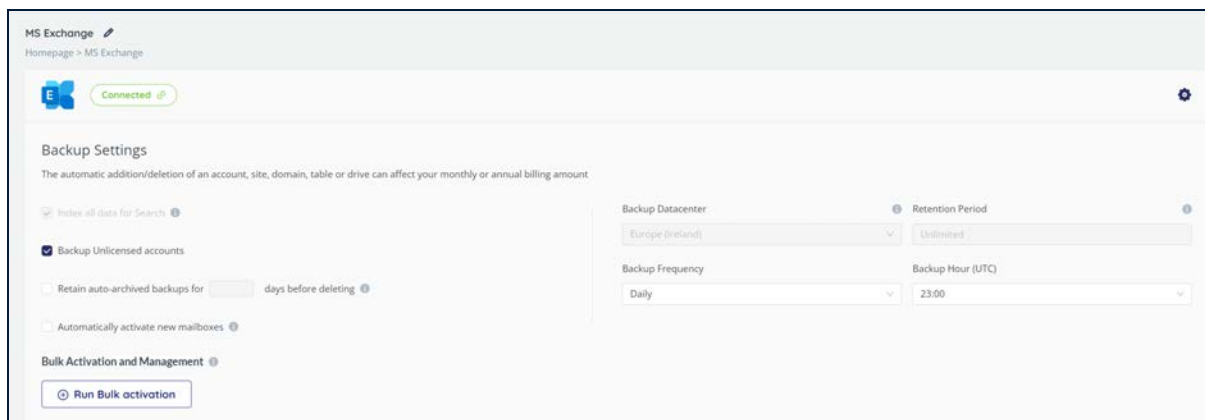


3.1.4 Bulk Activation and Management

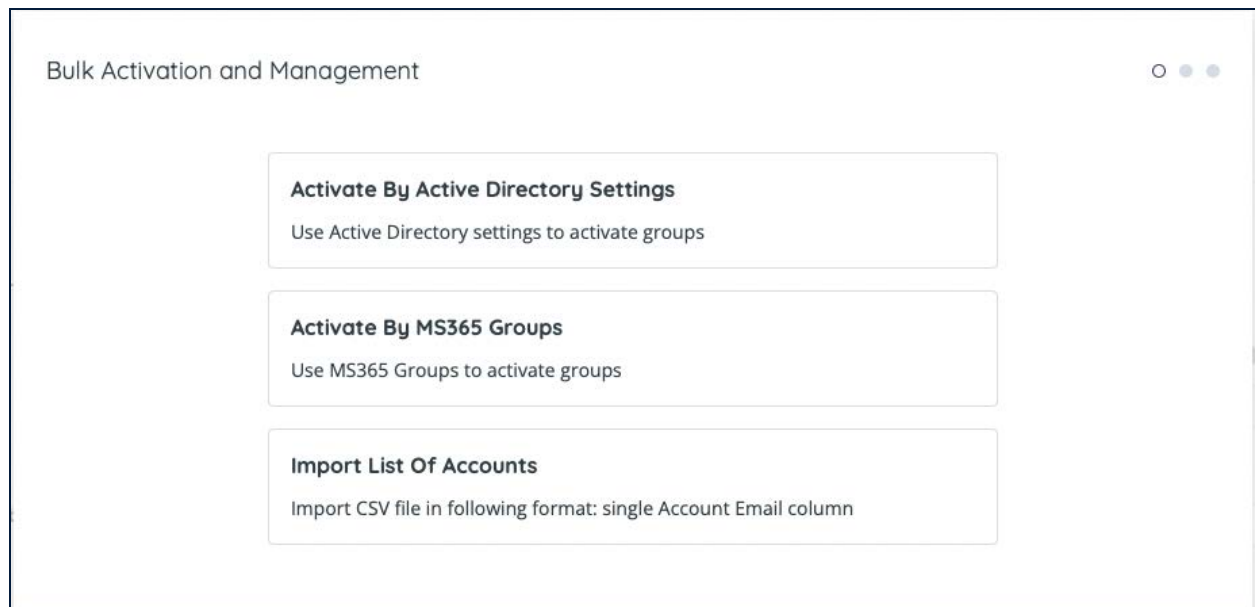
Want to save time and effort when setting up large numbers of Microsoft 365 backups?

CloudAlly's Bulk Activation feature enables you to activate the backups of all members of Microsoft Groups with a single click. When users are added or removed from the group, their backups will respond accordingly.

To create a new Activation Rule, from the *Backup Settings* screen, click **+Run Bulk Activation**.

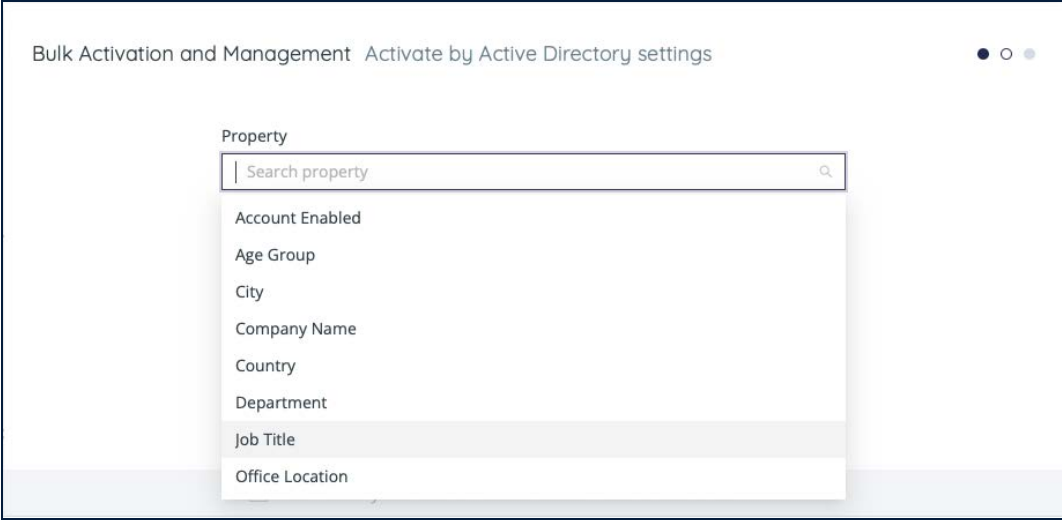


The following *Bulk Activation and Management* screen appears:



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.



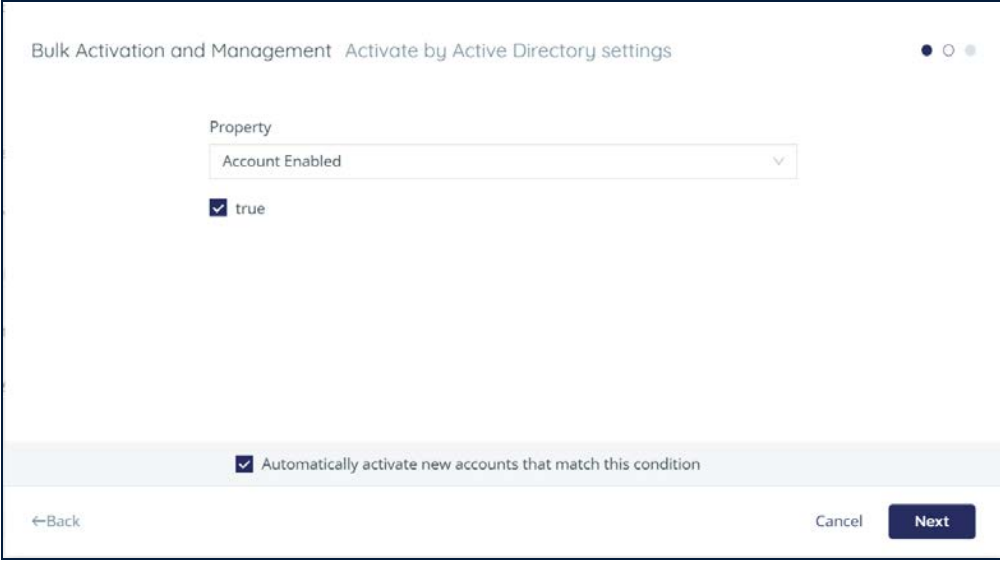
Bulk Activation and Management Activate by Active Directory settings

Property

Search property

- 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 and Management Activate by Active Directory settings

Property

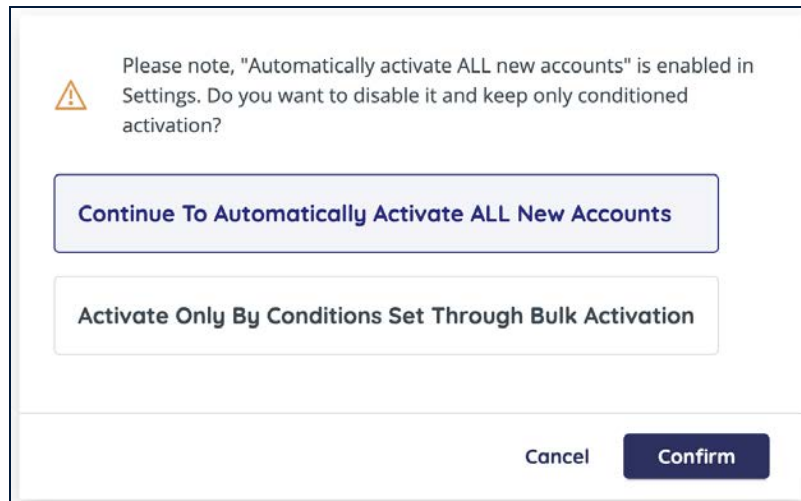
Account Enabled

☒ true

☒ Automatically activate new accounts that match this condition

←Back Cancel Next

The following pop up will appear.

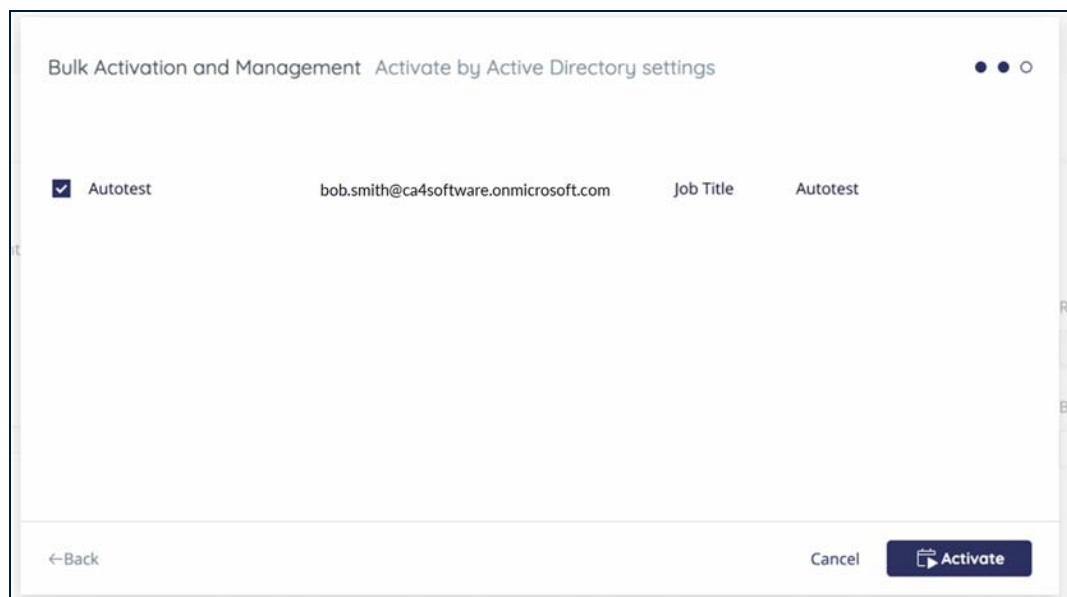


The pop up includes two available options for activation:

- 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.

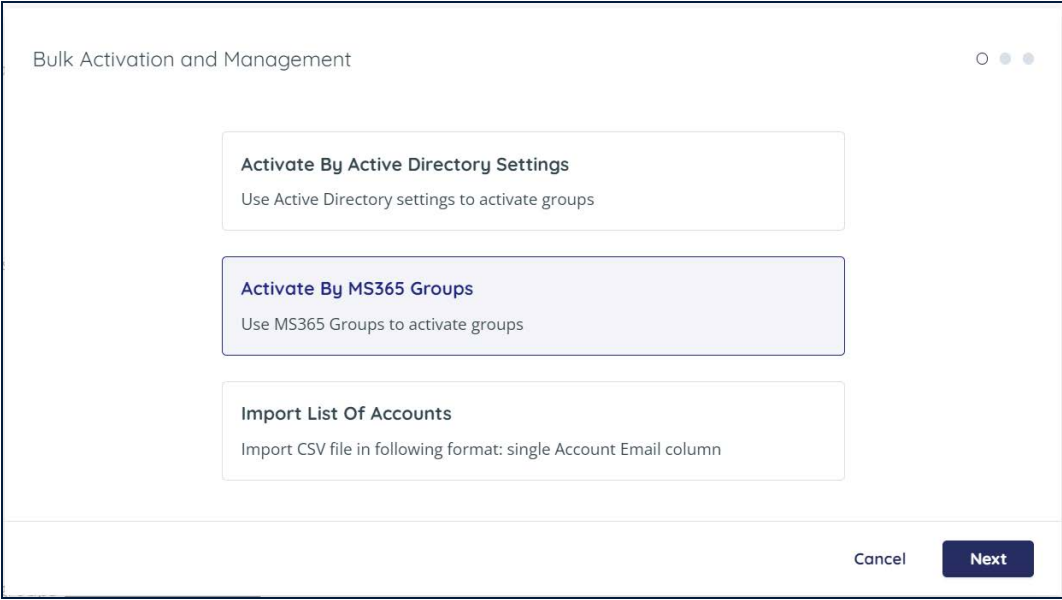
- Click **Next** once you have selected the desired Property and its values. The list of accounts matching the selected Property is displayed. Review the list of accounts that will be activated. You can clear the check boxes next to an account to exclude it from the activation process.



- 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.



Bulk Activation and Management

Activate By Active Directory Settings
Use Active Directory settings to activate groups

Activate By MS365 Groups
Use MS365 Groups to activate groups

Import List Of Accounts
Import CSV file in following format: single Account Email column

Cancel Next

Select the group(s) you would like to back up:

Note: Activation by Microsoft Groups works for already-existing mailboxes.

Bulk Activation and Management Activate by MS365 Groups

Search Group

- ☐ All Company
- ☐ Finance
- ☐ Knowledge share
- ☐ Management
- ☐ Marketing Team
- ☐ Marketing Team

← Back Cancel Next

Select one or more groups, and click **Next**.

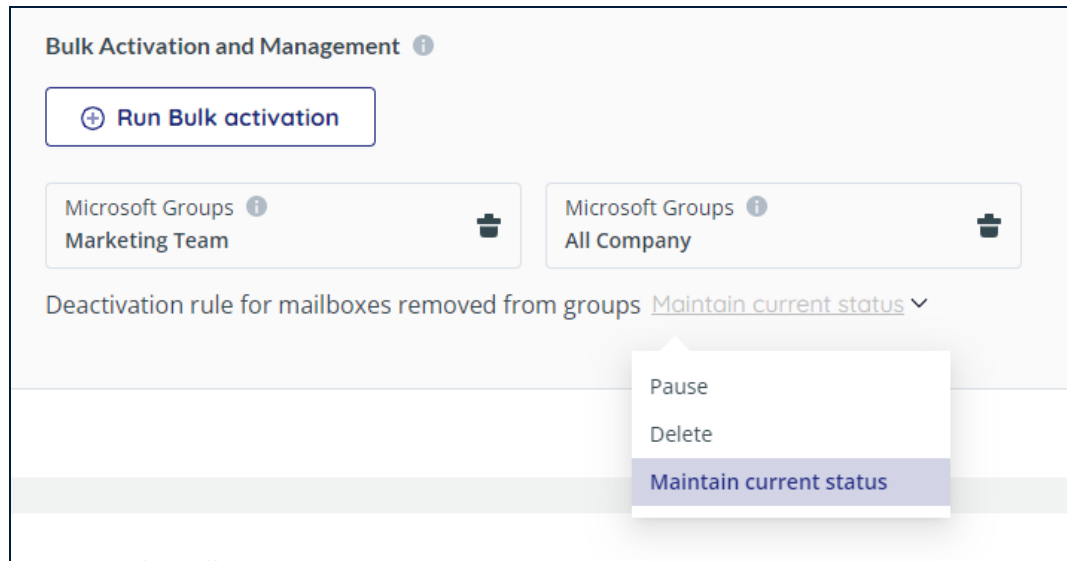
Bulk Activation and Management 1 mailboxes to activate

Account Name	Email	Group
<input checked="" type="checkbox"/> Bob Smith	bob.smith@ca4software.onmicrosoft.com	All Company

← Back Cancel Perform one-time activation Create an activation rule

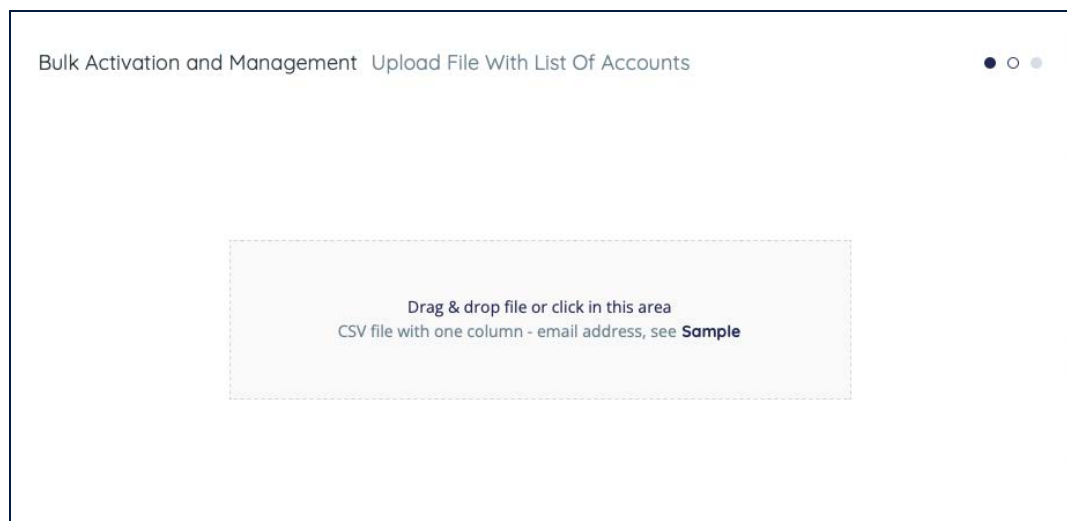
You have the option of a **one-time activation**, which will only run once, or **Create an activation rule**, which will run automatically. It checks daily to see changes to each group, and will back up mailboxes that are added to groups.

You can also configure a deactivation rule. There are three options: maintaining the current status, pausing backups or deleting backups.



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.

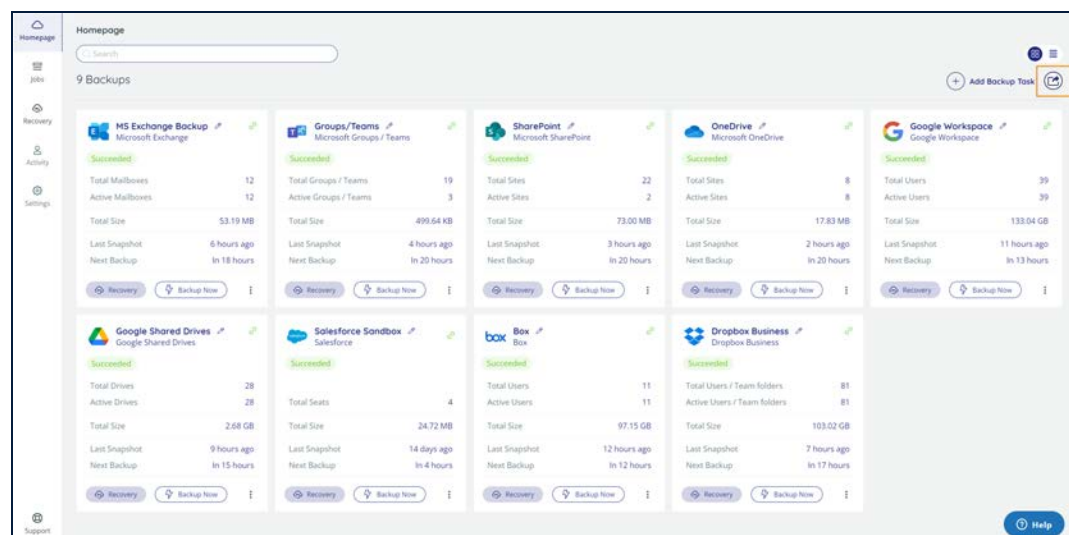
Public Folders data will be available for recovery under the PublicFoldersAccount record, listed among other backed up Exchange users.

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 Usage Reports

In order to provide greater clarity about what CloudAlly is backing up, you can export a CSV file that lists all of the entities - mailboxes, teams and sites - that were backed up, including the status of each entity (active, inactive, or archived). And for Microsoft Exchange mailboxes, the file will list whether each one is licensed or unlicensed. To export a usage report, click the **Export** button. The report will be sent to the user via email.

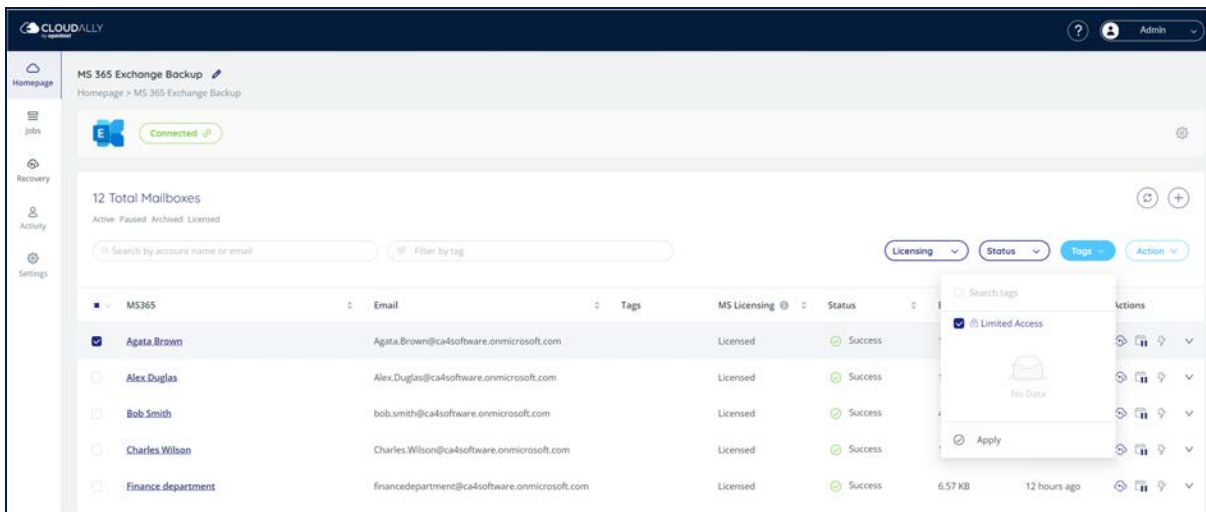


3.2 Securing Your Backups

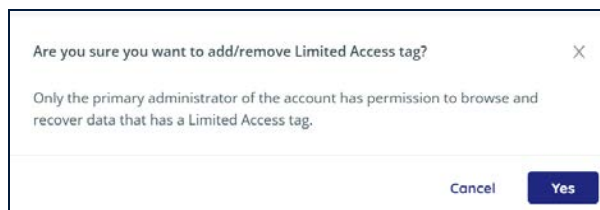
By default, all primary and secondary users can preview, browse, and recover any backed up data. This could be a security risk if sensitive information is contained in the backup snapshots.

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

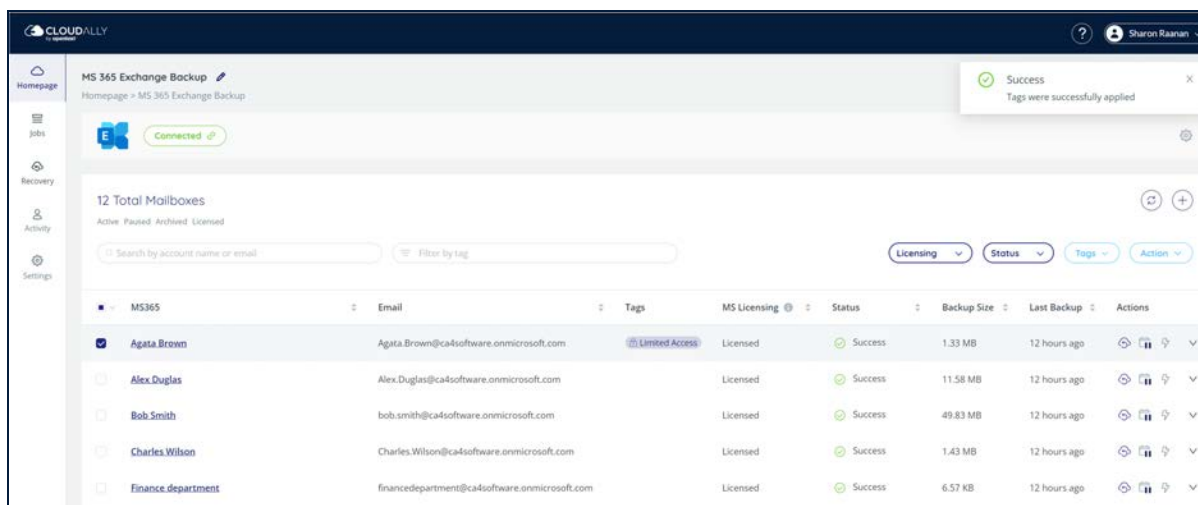
1. Primary user: From the *Homepage*, click the name of the service whose data you would like to restrict.
2. Click one or more account, team or sites.
3. Click **Tags**, and check the **Limited Access** tag.



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



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



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

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

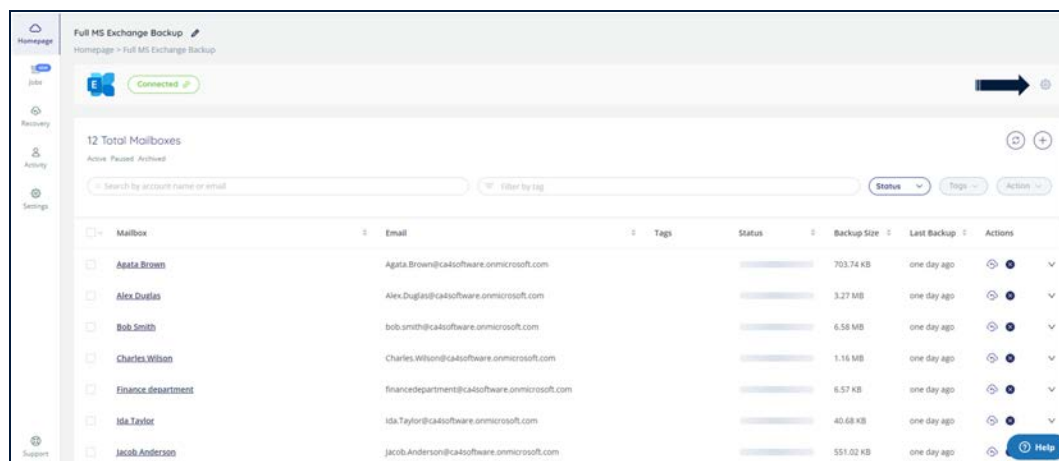
3.2.1 Modifying the Settings of an Existing Backup

To modify an existing backup task:

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



6. 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.
7. Click the gear-shaped **Settings** icon.



From here, it is possible to modify the fields described in ["Configuring a Backup Task: Microsoft Exchange."](#)

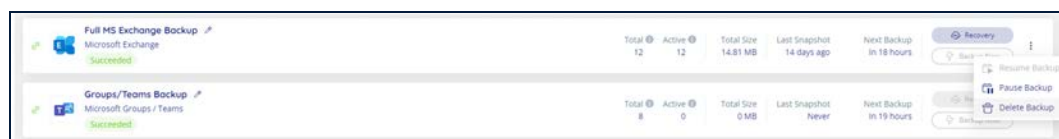
3.2.2 Removing a Backup

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.

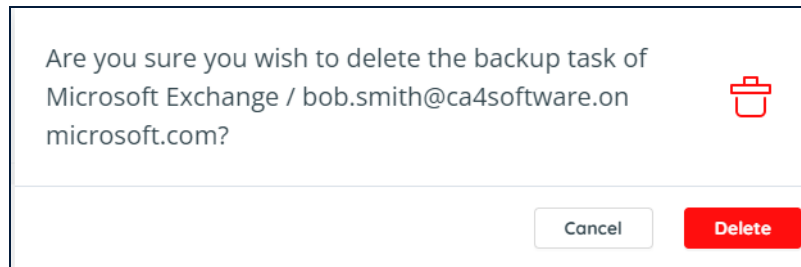
3.2.2.1 Removing an Entire Backup Service

To remove an entire backup service, click the **Delete Backup** icon of the backup service you want to remove.

Microsoft 365 Exchange



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

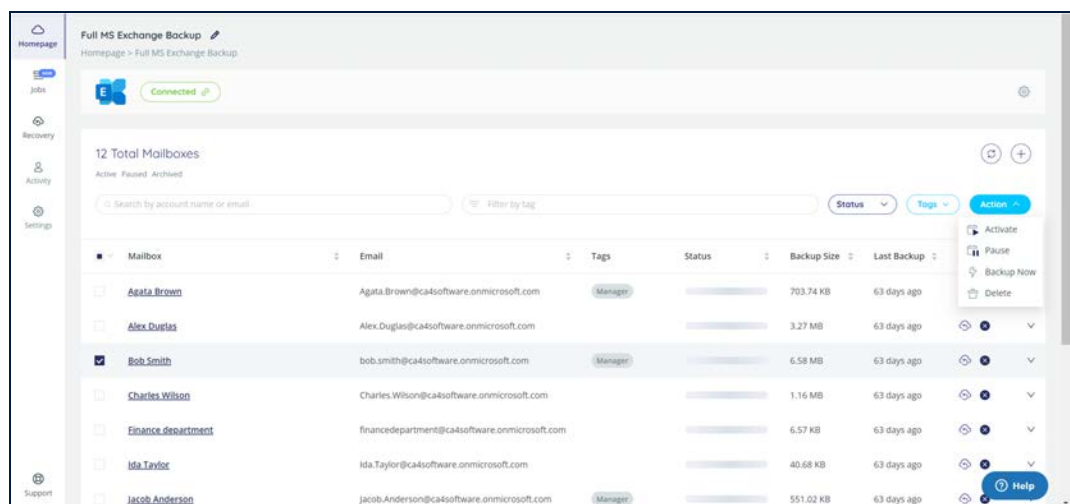


Click **Delete**. The selected backup service is removed from your account.

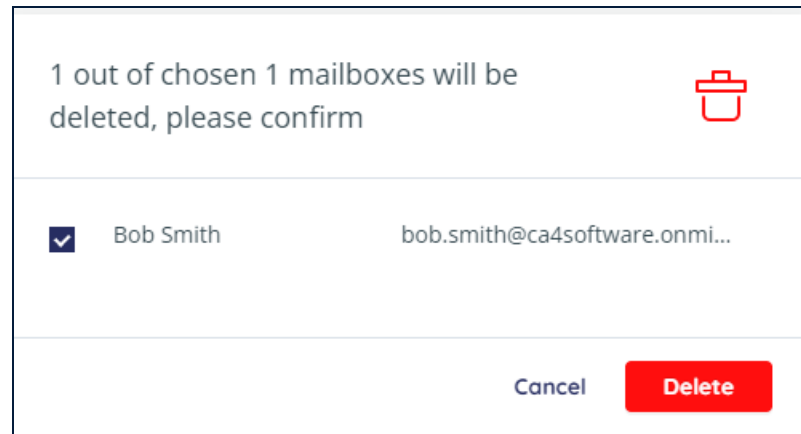
To prevent mistaken deletions, there is a grace period of 7 days, during which your data is still maintained and you can cancel the operation.

3.2.2.2 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.



3. 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.



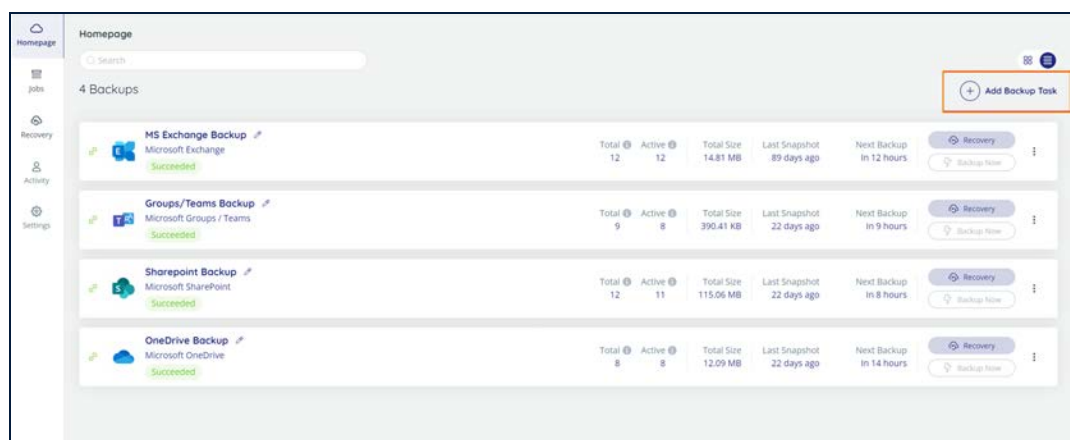
To prevent mistaken deletions, there is a grace period of 7 days, during which your data is still maintained and you can cancel the operation.

3.3 Microsoft 365 OneDrive

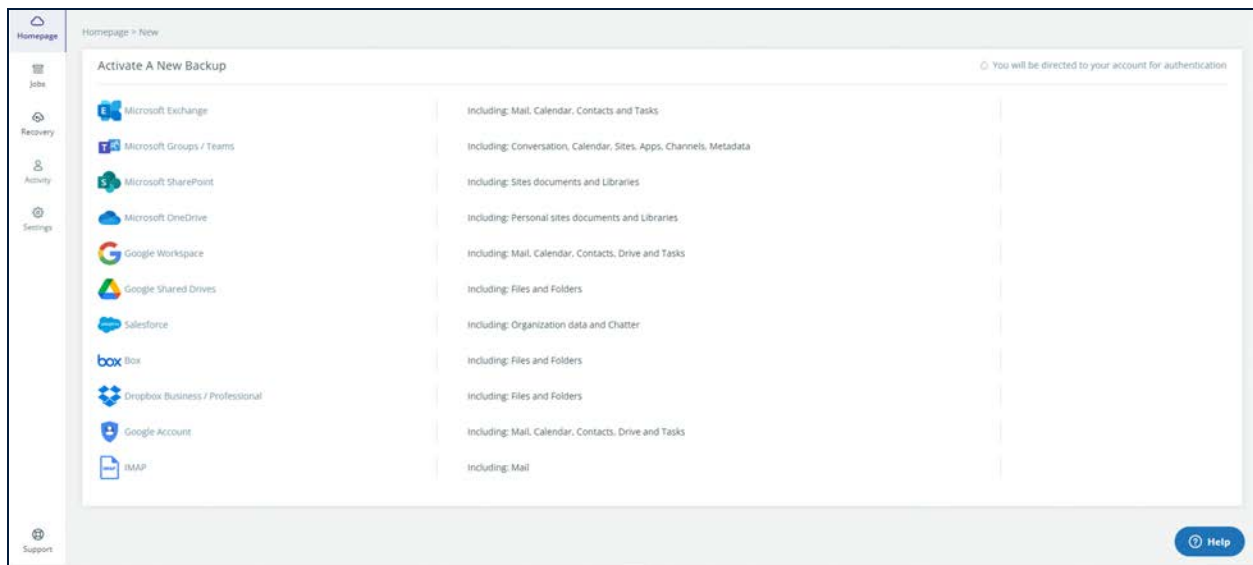
3.3.1 Adding a OneDrive Backup Task

To create a new backup task:

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



The *Activate A New Backup* page is displayed:



4. Click **OneDrive**.

The form is titled 'Enter your admin details' with a CloudAlly logo. It has a required field for 'Backup Name' with a red asterisk. Below the field is a text input box with the placeholder 'Enter your backup name'. A message states: 'Our authorization process uses OAuth and requires a Global Admin account.' At the bottom are two buttons: 'Cancel' and 'Authenticate'.

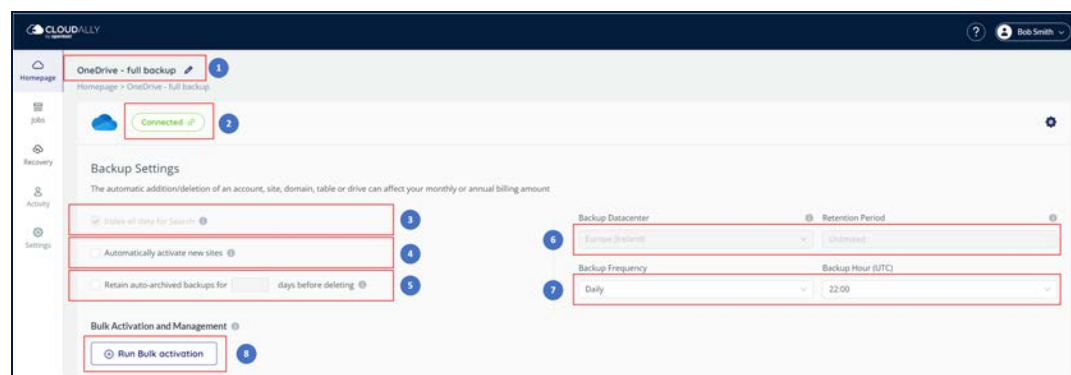
5. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
6. Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign

in to your Microsoft account.

IMPORTANT!

The user that you enter must have Global Admin permissions.

3.3.2 Configuring a OneDrive Backup Task



1. You can change the name of the backup task by clicking the pencil icon.
2. The Connected / Disconnected icons indicate 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 Connected icon changes to the Disconnected icon. 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.

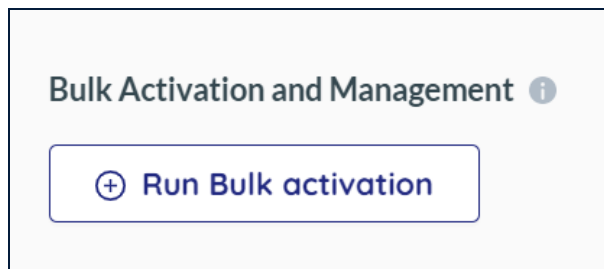
Note: Your backup storage location cannot be changed once it's been set during the account setup process. Contact CloudAlly if you need to move backups to a different geographic region, or if you'd like more information on our “Bring Your Own Storage” (BYOS) option

7. Backup Frequency and Backup Hour

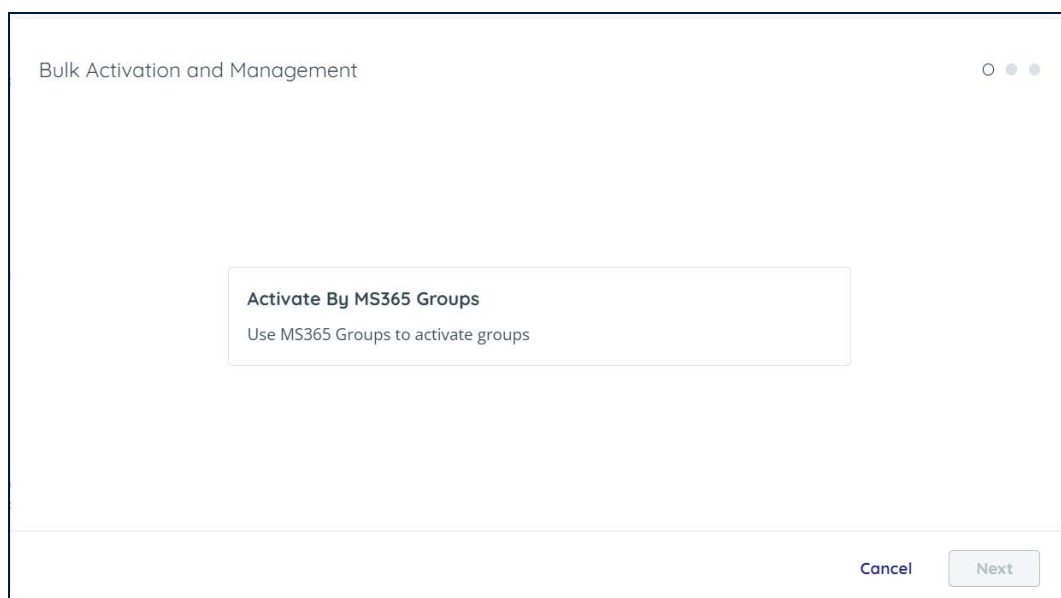
- a. Click the drop-down list of the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 days
 - iii. Weekly
 - iv. 3 times a day - contact CloudAlly to enable this option.
- b. Click the drop-down list of the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

3.3.3 Bulk Activation and Management

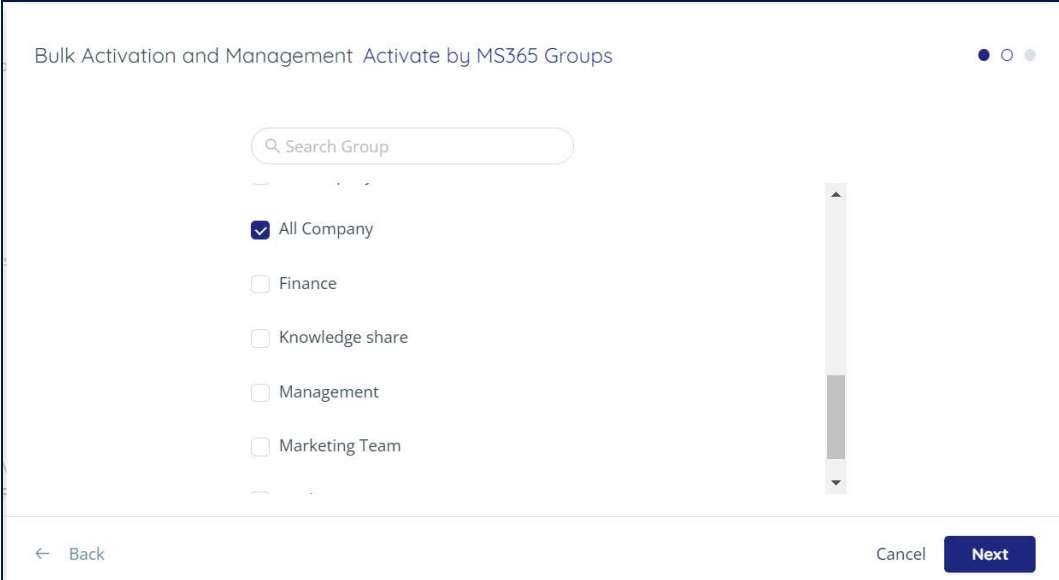
To create a bulk activation rule, click **+Run Bulk Activation**.



Click **Activate by MS365 Groups**, and then click **Next**.



Choose one or more groups that you would like to activate:



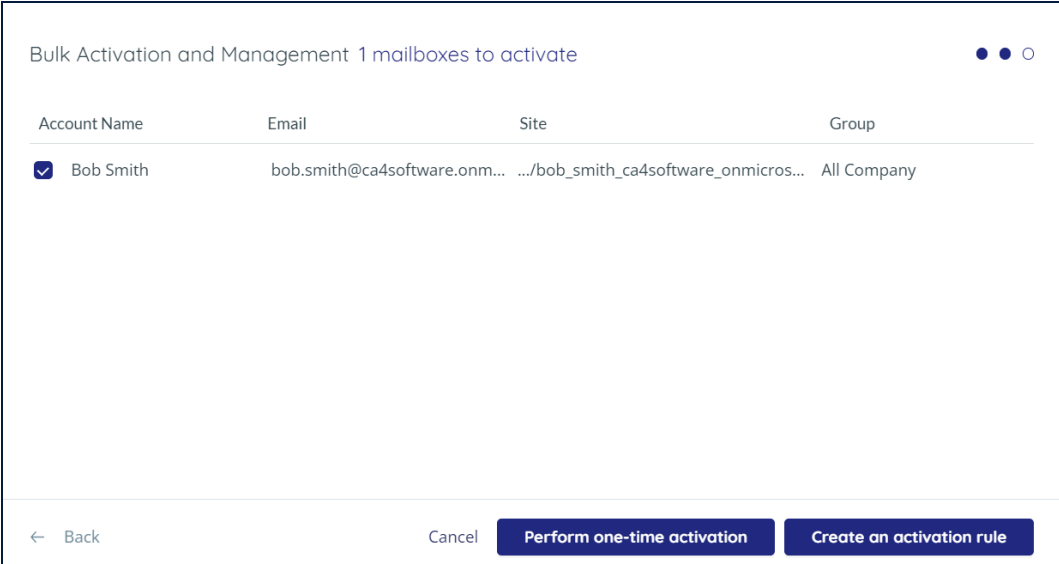
Bulk Activation and Management Activate by MS365 Groups

Search Group

- ☒ All Company
- ☐ Finance
- ☐ Knowledge share
- ☐ Management
- ☐ Marketing Team

← Back Cancel Next

You have the option of a **one-time activation**, which will only run once, or **Create an activation rule**, which will run automatically. It checks daily to see changes to each group, and will back up sites that belong to users that have been added to groups.

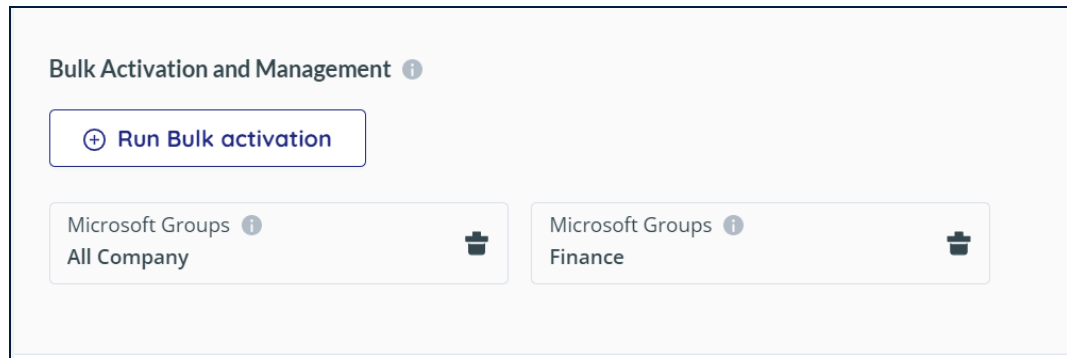


Bulk Activation and Management 1 mailboxes to activate

Account Name	Email	Site	Group
<input checked="" type="checkbox"/> Bob Smith	bob.smith@ca4software.onm...	.../bob_smith_ca4software_onmicros...	All Company

← Back Cancel Perform one-time activation Create an activation rule

The OneDrive settings screen will display the group activation rules that you enabled.



3.3.4 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.](#)"

3.3.5 Modifying the Settings of an Existing Backup

See instructions in "[Modifying the Settings of an Existing Backup.](#)"

3.3.6 Removing a Backup

See instructions in "[Removing a Backup.](#)"

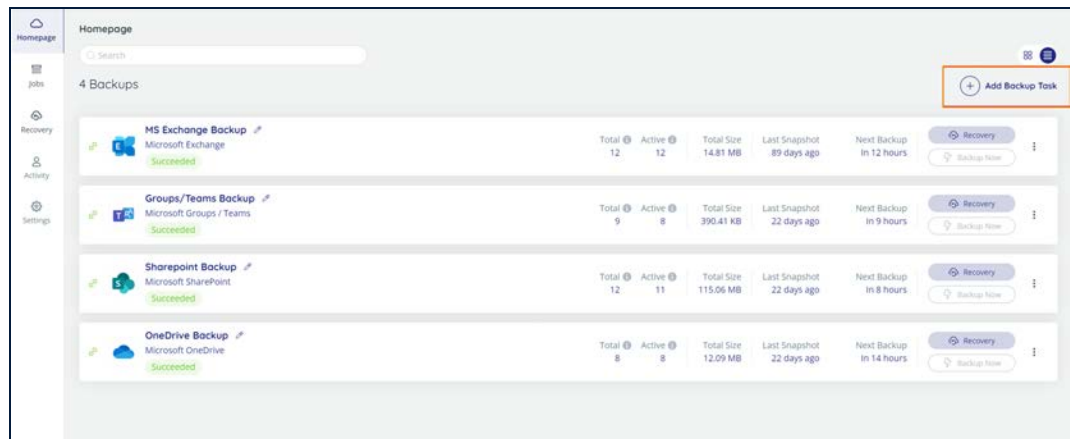
3.4 Microsoft 365 SharePoint

3.4.1 Adding a Microsoft 365 SharePoint Backup Task

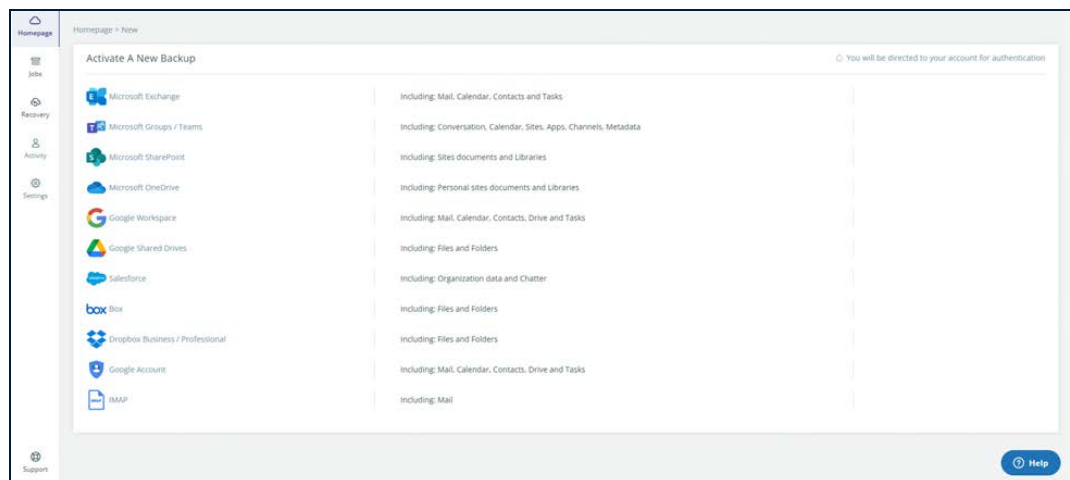
Note: In order to back up all data, CloudAlly assigns the backup user to be the site collection administrator. If CloudAlly is unable to do so (for example, because the user doesn't have proper permissions), then the user needs to be added manually.

To create a new backup task:

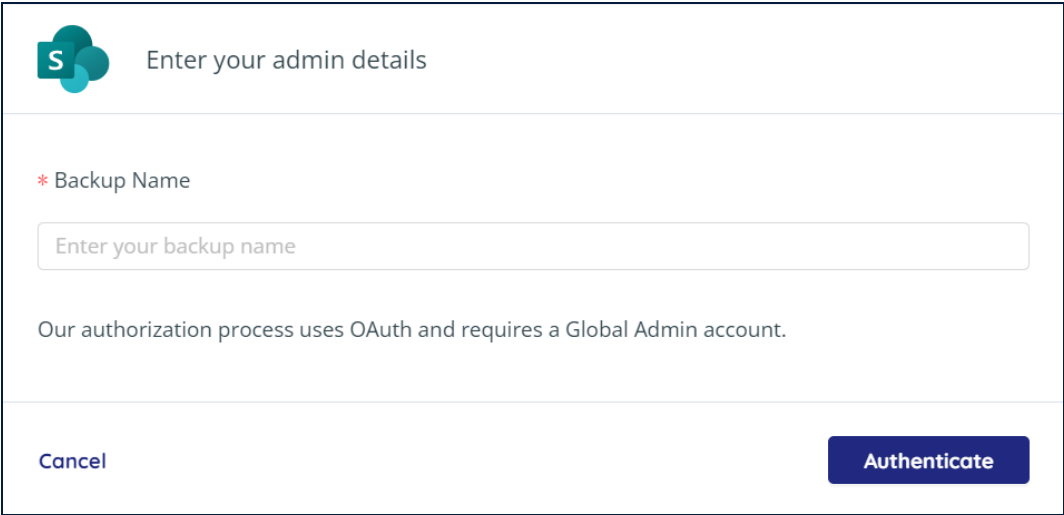
1. Sign in to your Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click **+ Add Backup Task**.




The *Activate A New Backup* page is displayed:



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



 Enter your admin details

* Backup Name

Enter your backup name

Our authorization process uses OAuth and requires a Global Admin account.

Cancel **Authenticate**

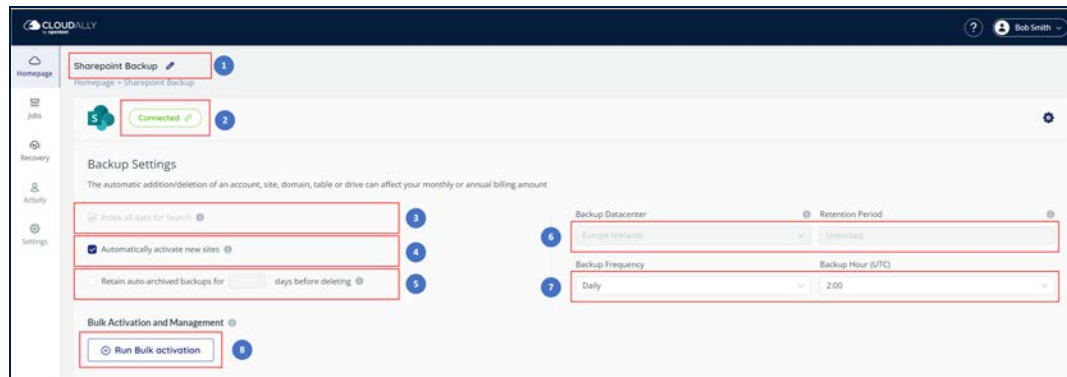
9. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
10. Click **Authenticate** to start the process of granting the access token. You will be redirected to the *Microsoft sign-in* page. Enter Global Admin credentials to sign in to your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

IMPORTANT!

The user that you enter must have Global Admin permissions.

3.4.2 Configuring a Microsoft 365 SharePoint Task

This set of options enables you to select the backup settings for the account, team or site. Click the gear-shaped Settings icon.



1. You can change the name of the backup task by clicking the pencil icon.
2. The Connected / Disconnected icon indicates 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 Connected icon changes to the Disconnected icon. 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 sites, 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 Datacenter** and **Retention Period** fields are “display only,” and their values can’t be changed here.

6. The **Backup Datacenter** field displays the Datacenter 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 datacenter 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.

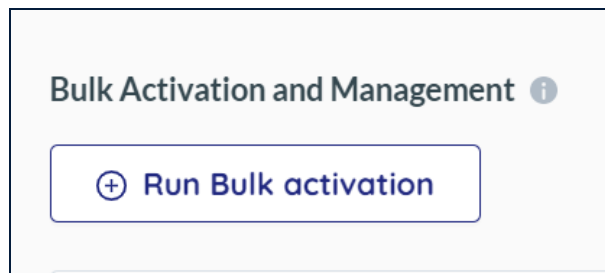
7. Backup Frequency and Backup Hour

- a. Click the drop-down list of the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 days
 - iii. Weekly
 - iv. 3 times a day - contact CloudAlly to enable this option.
- b. Click the drop-down list of the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

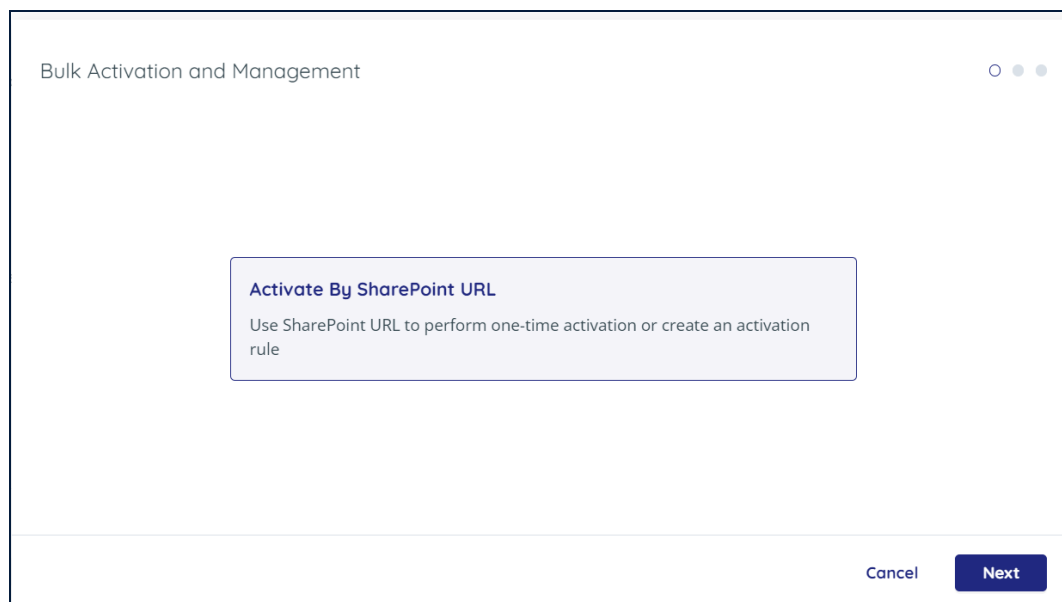
8. Bulk Activation - see below.

3.4.3 Bulk Activation and Management

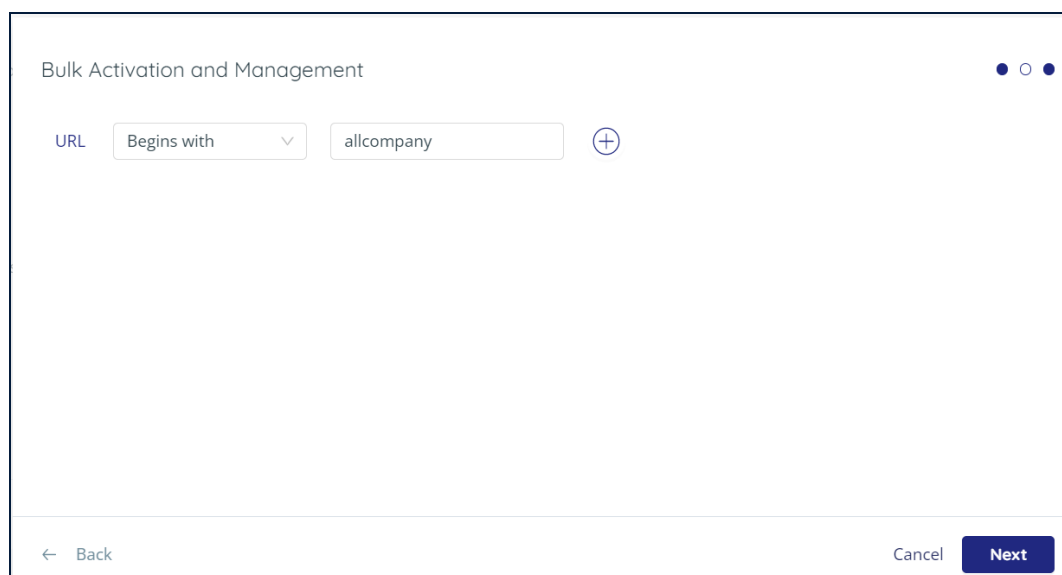
To create a bulk activation rule, click **+Run Bulk Activation**.



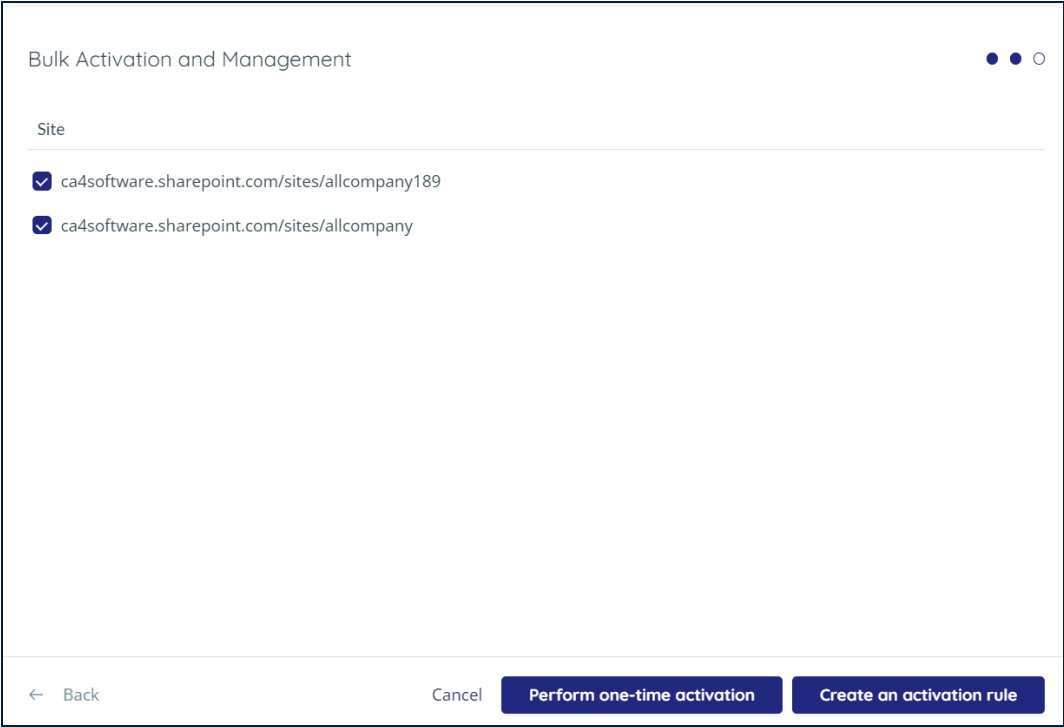
Click **Activate by SharePoint URL**, and then click **Next**.



Choose a filter to locate which SharePoint URLs you would like to back up, and click **Next**.



You have the option of a **one-time activation**, which will only run once, or **Create an activation rule**, which will run automatically. It checks daily to see if there are new SharePoint sites that match the conditions set in the activation rules (for example, "begins with X, " "ends with Y"), and then backs up these sites.

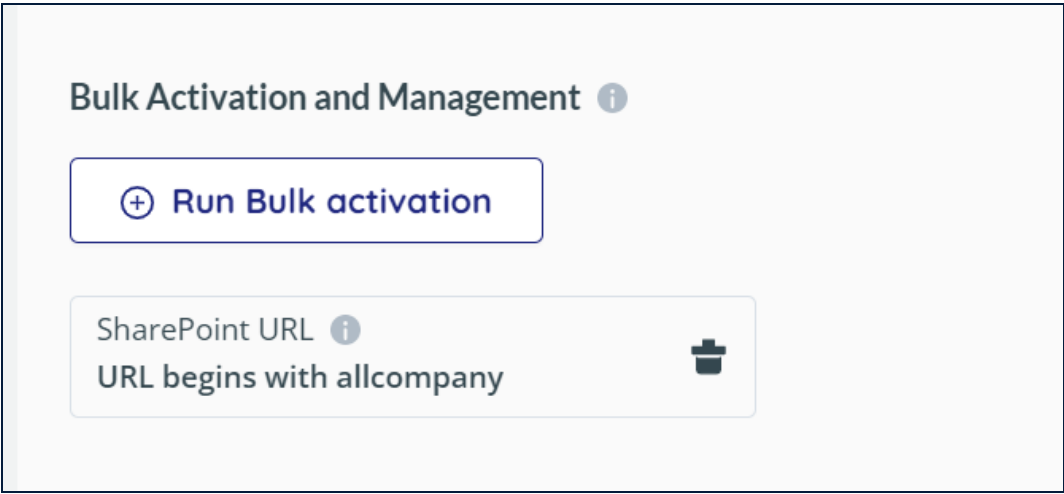


The screenshot shows a web interface titled "Bulk Activation and Management". Below the title is a section labeled "Site" containing a list of two SharePoint sites, each with a checked checkbox:

- ☒ ca4software.sharepoint.com/sites/allcompany189
- ☒ ca4software.sharepoint.com/sites/allcompany

At the bottom of the screen, there are four buttons: "Back" (with a left arrow), "Cancel", "Perform one-time activation", and "Create an activation rule".

The SharePoint settings screen will display the activation rules that you enabled.



The screenshot shows a web interface titled "Bulk Activation and Management" with an information icon. Below the title is a button labeled "Run Bulk activation" with a plus icon. Below that is a section labeled "SharePoint URL" with an information icon, containing the text "URL begins with allcompany" and a trash icon.

3.4.4 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.](#)"

3.4.5 Modifying the Settings of an Existing Backup

See instructions in "[Modifying the Settings of an Existing Backup.](#)"

3.4.6 Removing a Backup

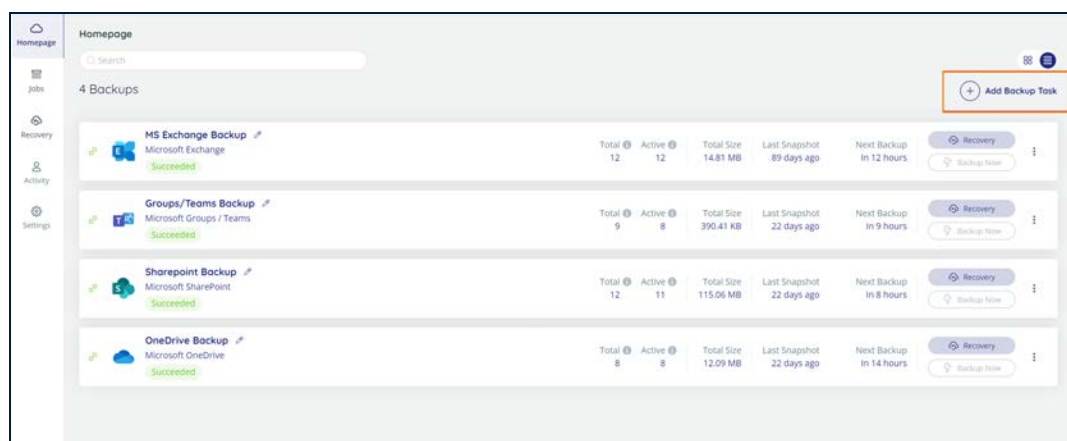
See instructions in "[Removing a Backup.](#)"

3.5 Microsoft 365 Teams & Groups

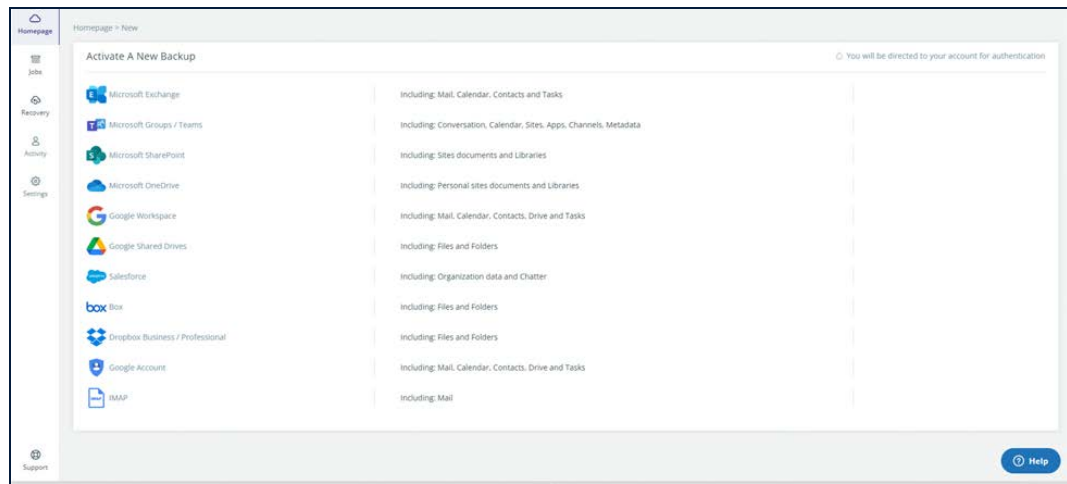
3.5.1 Adding a Microsoft 365 Teams & Groups Backup Task

To create a new backup task:

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



The *Activate A New Backup* page is displayed:



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

The screenshot shows a form titled 'Enter your admin details'. It includes a Microsoft Teams icon. Below the title is a red asterisk followed by the text '* Backup Name'. There is a text input field containing the text 'Teams/Groups backup'. Below the input field is a note: 'Please note that our authorization process uses OAuth and requires a Global Admin account.' At the bottom of the form are two buttons: 'Cancel' on the left and 'Authenticate' on the right.

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, as well as a Microsoft 365 Teams license.

3.5.2 Configuring a 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 gear-shaped Settings icon.

The screenshot shows the 'Groups/Teams backup' settings page. At the top, there's a header with a pencil icon (1) and a 'Connected' status with a gear icon (2). Below this is the 'Backup Settings' section, which includes a note about billing and three options: 'Index all data for Search' (checked, 3), 'Automatically activate new groups / teams' (checked, 4), and 'Retain auto-archived backups for' (5). To the right is the 'Backup Configuration' section with four dropdowns: 'Backup Datacenter' (6, set to 'EU (Ireland)'), 'Retention Period' (set to 'Unlimited'), 'Backup Frequency' (7, set to 'Daily'), and 'Backup Hour (UTC)' (set to '3:00'). At the bottom right are 'Cancel' and 'Save' buttons.

1. You can change the name of the backup task by clicking the pencil icon.
2. The Connected/ Disconnected icon indicates 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 Connected icon changes to the Disconnected icon. 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 team or group 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 Datacenter** and **Retention Period** fields are “display only,” and their values can’t be changed here.

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

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

- 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 of the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 Days
 - iii. Weekly
 - iv. 3 times a day - contact CloudAlly to enable this option.
- b. Click the drop-down list of the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

3.5.3 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.](#)"

3.5.4 Modifying the Settings of an Existing Backup

See instructions in "[Modifying the Settings of an Existing Backup.](#)"

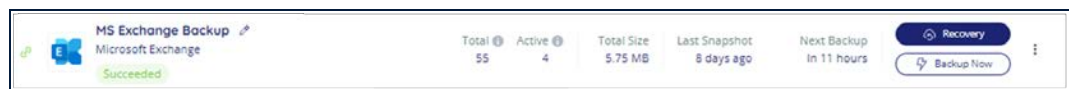
3.5.5 Removing a Backup

See instructions in "[Removing a Backup.](#)"

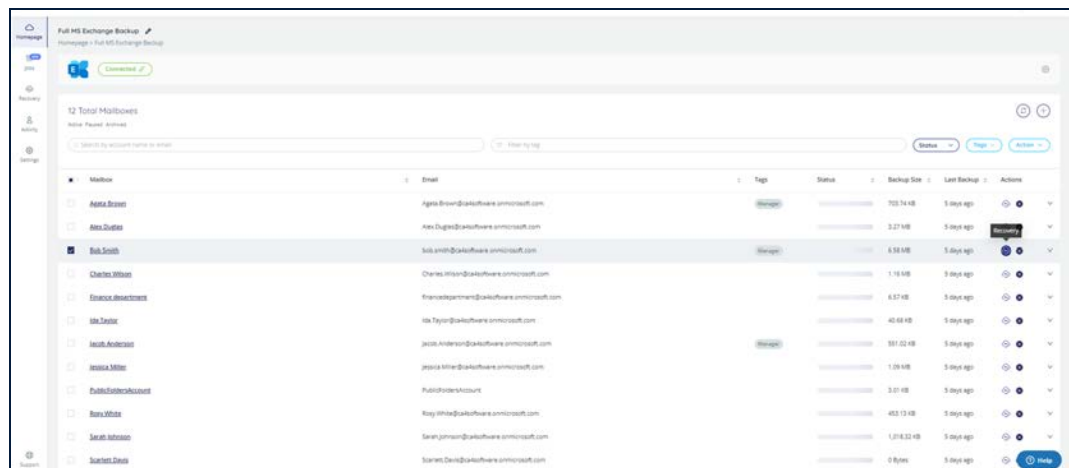
4 Recovering Your Backed Up Data

4.1 Microsoft 365 Exchange: Performing a 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**.



- 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.



3. Click **Full Mailbox Recovery**.

Advanced Recovery Options for Bob.smith@ca4software.onmicrosoft.com

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.

Cancel 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 Mailbox Export for Bob.smith@ca4software.onmicrosoft.com

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.

Cancel 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. Once you click a particular date, a card will open, indicating whether the backup was successful, partially successful, or if it failed.

Full Mailbox Export for bob.smith@ca4software.onmicrosoft.com

Choose the date of the backup to be used for Recovery:

☐ Last Backup

☒ Specific Backup Date

Browse the calendar and select a specific backup date

Backup date

« < Jun 2022 > »

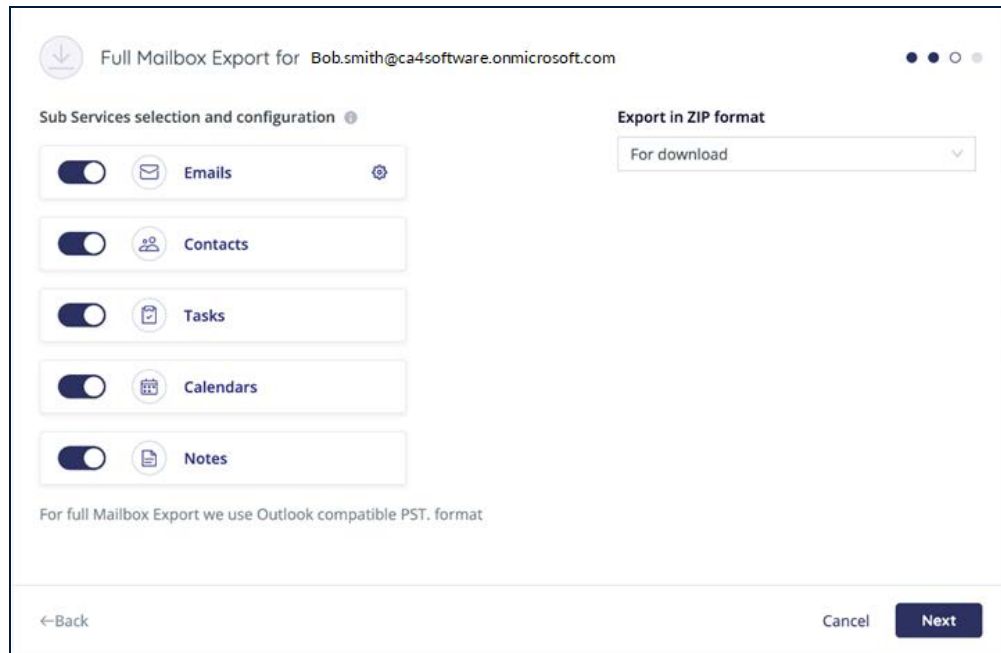
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

← Back Cancel Next

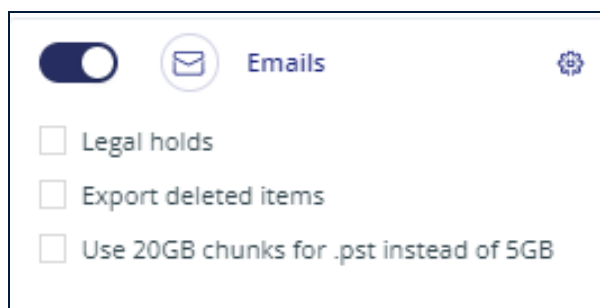
Legend: Meaning of Calendar Dots

Dot Color	Meaning
Green	Successful backup
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.



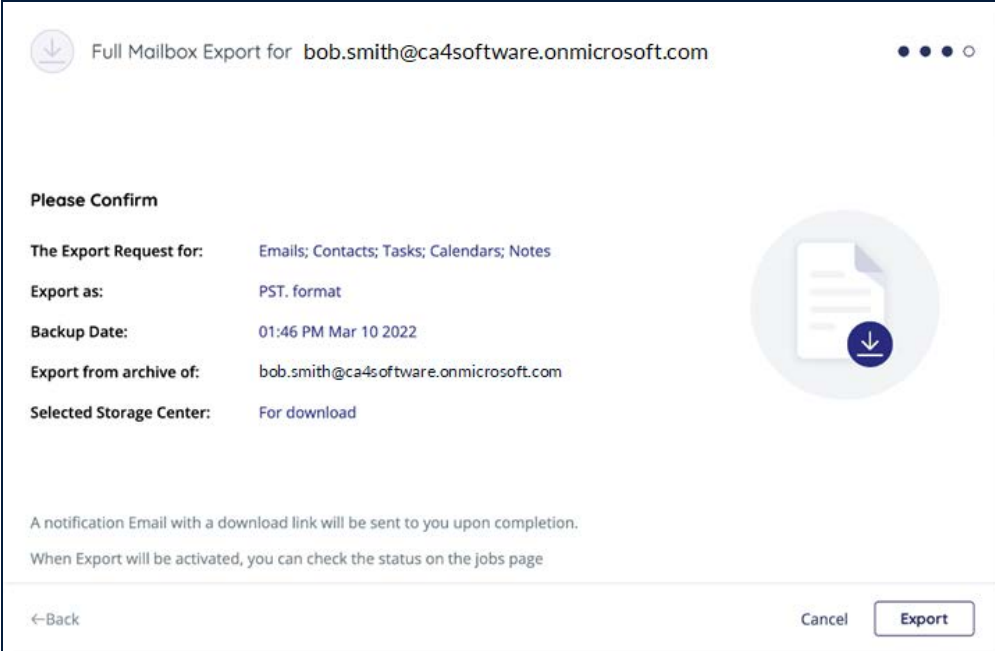
4. Click the gear-shaped settings icon. The following options are available:
- a. **Legal holds:** Choose this option if you want to export all legal / litigation holds placed on this mailbox using Microsoft's Exchange Online Archive (EOA) service.
 - b. **Export deleted items:** recover items that were 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**.)



The screenshot shows a confirmation window titled "Full Mailbox Export for bob.smith@ca4software.onmicrosoft.com". It includes a "Please Confirm" section with the following details:

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:	bob.smith@ca4software.onmicrosoft.com
Selected Storage Center:	For download

Below the table, it states: "A notification Email with a download link will be sent to you upon completion. When Export will be activated, you can check the status on the jobs page". At the bottom, there are buttons for "←Back", "Cancel", and "Export".

7. Check the *Jobs* page to track the progress of your job. See "Tracking Recovery Tasks on the Jobs Page" on page 88 for details.
8. When the export is complete, click **Download Results**.

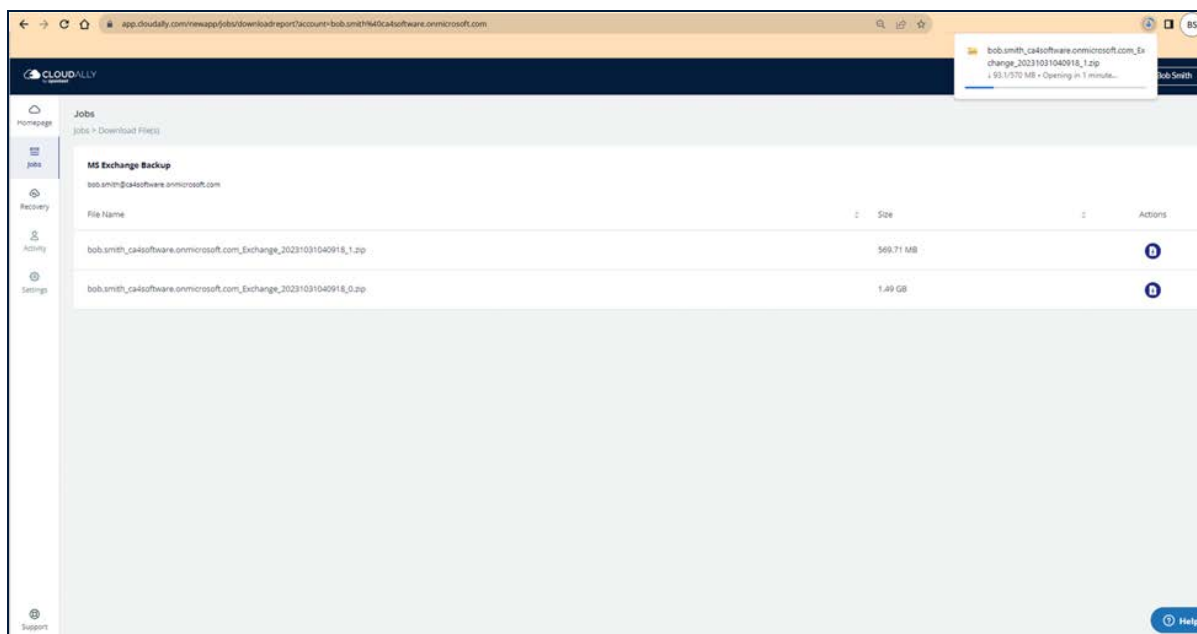


The screenshot shows a job completion summary for "Full MS Exchange Backup Microsoft Exchange". It includes a table with the following data:

Started at:	Backup Date:	Initiator:	Destination:	Total Items:	Size
Aug 23 2022 at 05:20 PM	Jul 06 2022 at 05:06 AM	bob.smith@ca4software.onmicrosoft...	Direct Download	95	2.25 MB

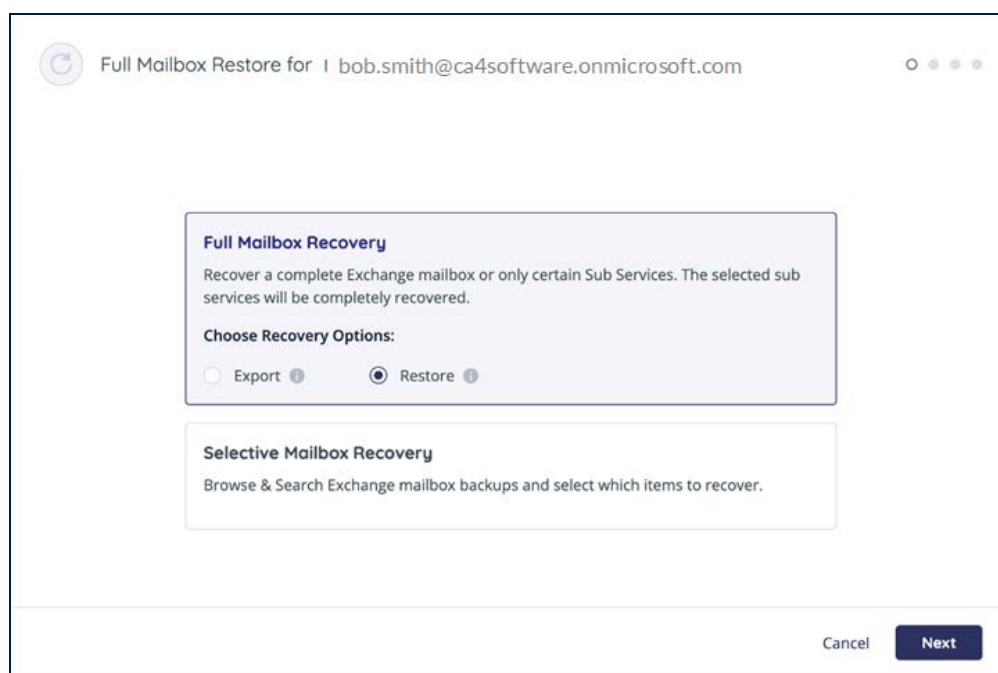
At the bottom, there are buttons for "Cancel", "Download Results", and "View Log". A green "Succeeded" status is shown in the top right corner.

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



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.



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. Once you click a particular date, a card will open, indicating whether the backup was successful, partially successful, or if it failed.

Full Mailbox Restore for bob.smith@ca4software.onmicrosoft.com

Choose the date of the backup to be used for Recovery:

☐ Last Backup
06:09 AM Oct 31 2023

☒ Specific Backup Date

Calendar for Oct 2023 showing backup status indicators (dots) for each day.

← Back Cancel Next

Legend: Meaning of Calendar Dots

Dot Color	Meaning
Green	Successful backup
Orange	Partially successful backup
Two dots	Multiple backups on that date

Full Mailbox Restore for bob.smith@ca4software.onmicrosoft.com

Choose the date of the backup to be used for Recovery:

☐ Last Backup

☒ **Specific Backup Date**
Browse the calendar and select a specific backup date
Backup date
Mar 10 2022

Successful Backup
08:27 AM Mar 10 2022

Successful Backup
01:46 PM 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.

Full Mailbox Restore for bob.smith@ca4software.onmicrosoft.com

Sub Services selection and configuration ⓘ

☒ Emails

☒ Contacts

☒ Tasks

☒ Calendars

☒ Notes

Restore Destination

☒ Restore to the original account

☐ Restore to another account ⓘ

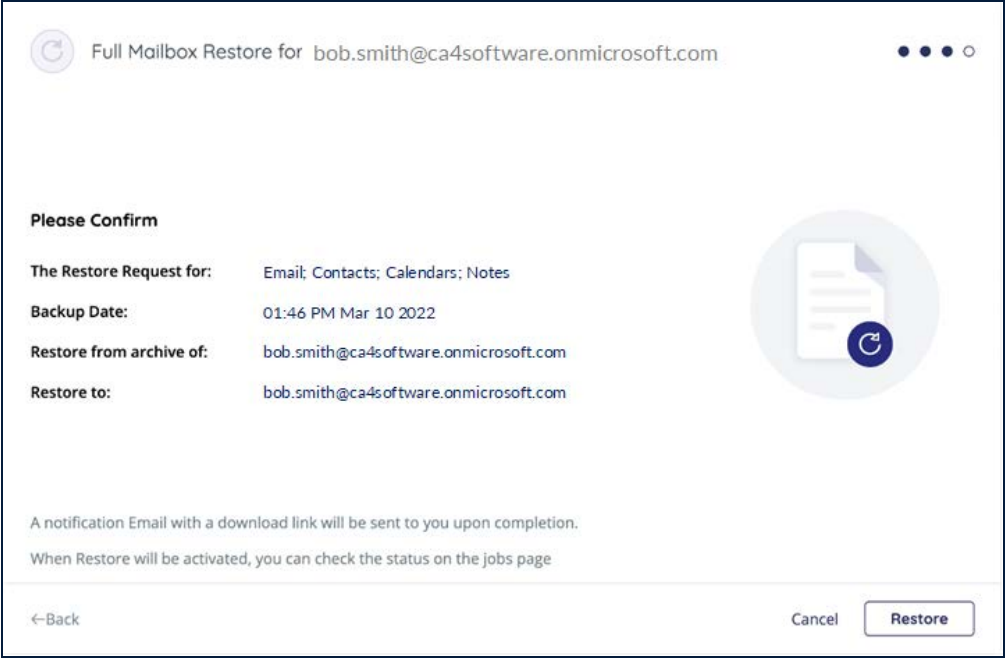
Restore Type

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.

← 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:** The restored items will be located in the same place as the existing items, not in a separate folder when you choose nondestructive restore.
 - 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 located in the same place as the existing items.
 - 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**.)



The screenshot shows a confirmation window titled "Full Mailbox Restore for bob.smith@ca4software.onmicrosoft.com". It contains the following information:

- Please Confirm**
- The Restore Request for:** Email; Contacts; Calendars; Notes
- Backup Date:** 01:46 PM Mar 10 2022
- Restore from archive of:** bob.smith@ca4software.onmicrosoft.com
- Restore to:** bob.smith@ca4software.onmicrosoft.com

Below the details, it states: "A notification Email with a download link will be sent to you upon completion. When Restore will be activated, you can check the status on the jobs page". At the bottom, there are three buttons: "← Back", "Cancel", and "Restore".

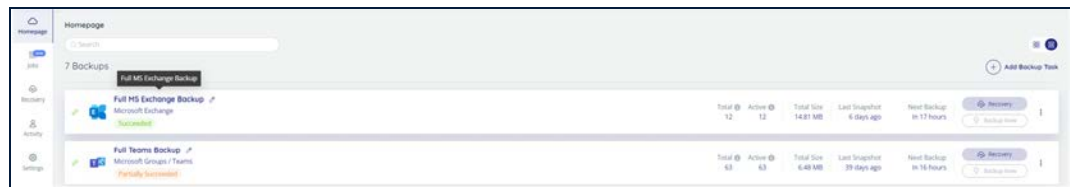
7. Check the *Jobs* page to track the progress of your job. See ["Tracking Recovery Tasks on the Jobs Page"](#) for details.
8. After the restore task completes, you will receive a Confirmation Report by email.

4.2 Recovering Microsoft 365 Exchange: New Recovery Page

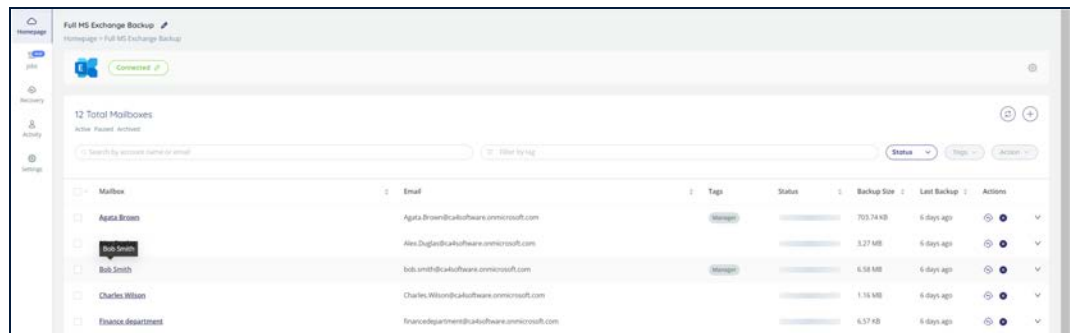
4.2.1 Navigating to the Recovery Page

There are two ways to get to the recovery page:

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



- And then click the name of the mailbox.



- 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**

Advanced Recovery Options for bob.smith@ca4software.onmicrosoft.com

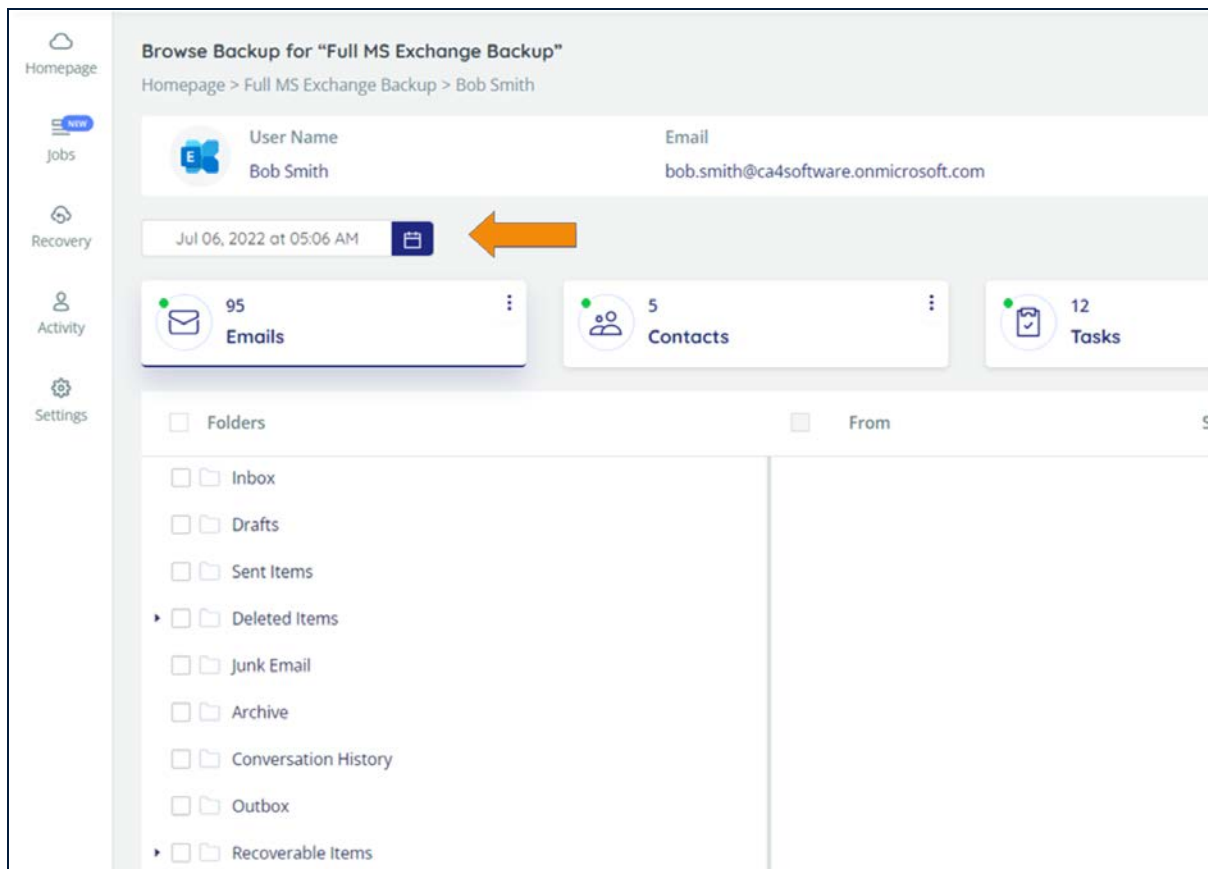
Full Mailbox Recovery
Recover a complete Exchange mailbox or only certain Sub Services. The selected sub services will be completely recovered.

Selective Mailbox Recovery
Browse & Search Exchange mailbox backups and select which items to recover.

← Back Cancel Next

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.



The dots indicate that one or more backups were performed on that day. Two dots indicate that multiple backups were performed on that day. Once you click a particular date, a card will open, indicating whether the backup was successful, partially successful, or if it failed.

Choose the Backup Date

Calendar view for July 2022. The 5th is highlighted with a blue circle and a green dot. The 12th is circled in orange. Two green boxes on the right show 'Successful Backup' for 05:02 AM and 11:19 AM on Jul 05 2022. At the bottom are 'Cancel' and 'Confirm' buttons.

Legend: Meaning of Calendar Dots

Dot Color	Meaning
Green	Successful backup
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: Emails, Contacts, Tasks, Calendars and Notes.

The screenshot shows the 'Browse Backup for MS Exchange Backup' interface. It displays a summary card for Bob Smith with the following details: User Name (Bob Smith), Email (bob.smith@ca4software.onmicrosoft.com), Last Backup (13 hours ago), Total Size (20.55 MB), and Backup Status (Succeeded). Below the summary card, there are five cards representing different data types: 190 Emails, 32 Contacts, 46 Tasks, 3156 Calendars, and 12 Notes. The interface also includes a sidebar with navigation options like Home, Jobs, Recovery, Activity, and Settings, and a bottom section for filtering by Folders, From, Subject, and Date.

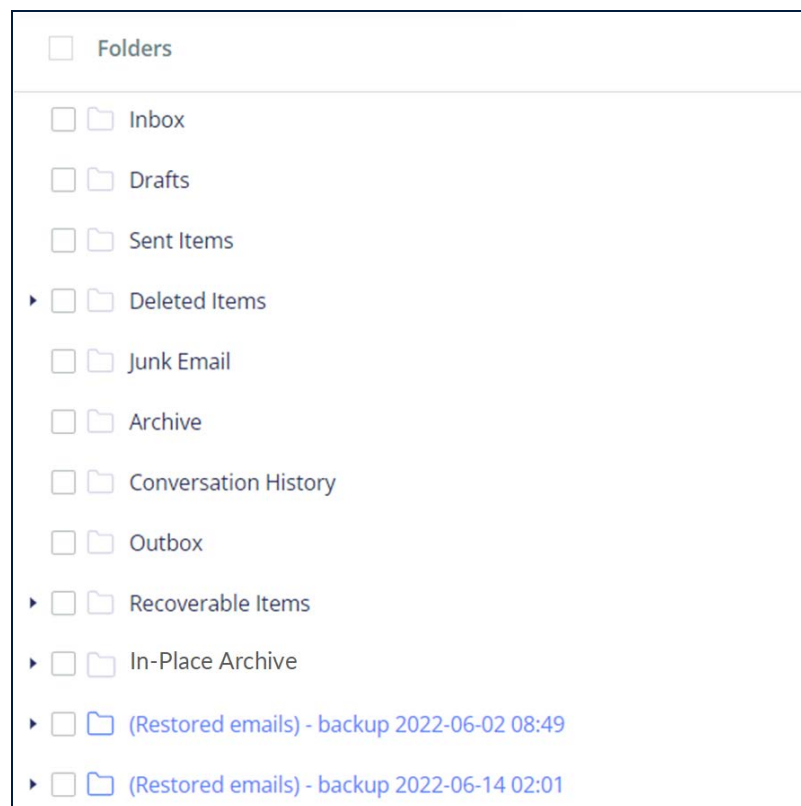
- Each of the cards has a number on it, which shows how many items there are on that date – in the mailbox, in the list of contacts, in the list of tasks, in the calendar, or in the list of notes.

- Each of the cards also has a colored status indicator, which lets you know whether the sub-service was successfully backed up, whether it was partially successful, or if it failed.

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.

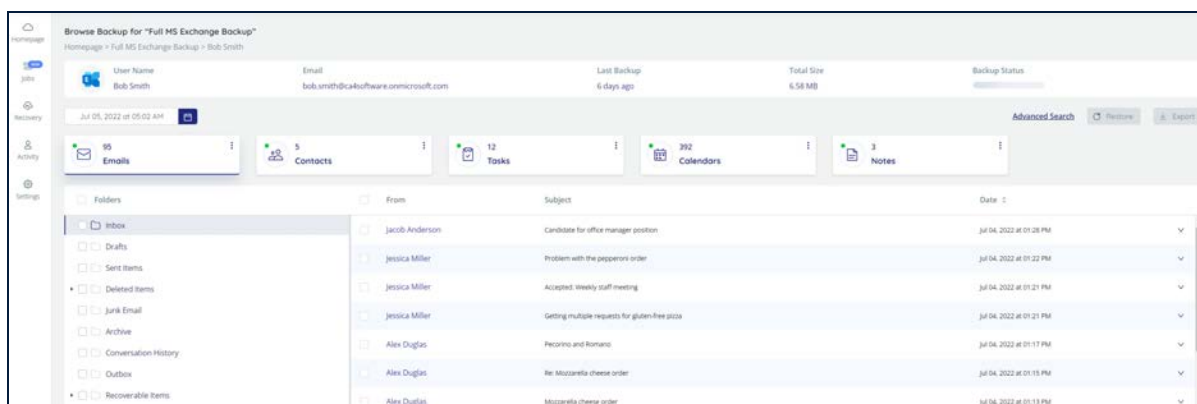
The Recovery folders are in the same familiar order as they are in Outlook, to make it easy for you to find the item you are looking for.



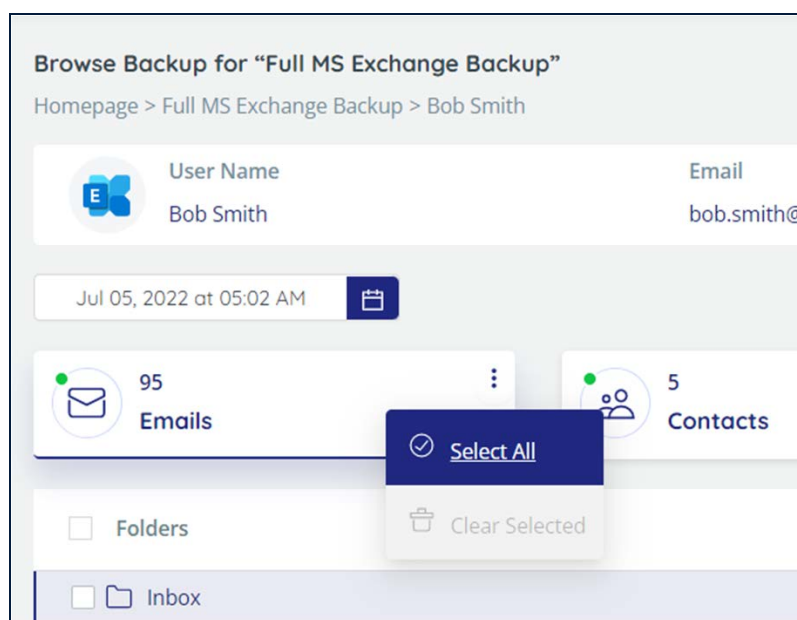
In addition to the usual folders, such as Inbox, Sent Items, and Deleted Items, at the bottom of the list you will find the Recoverable Items folder, and the In-Place Archive folder (if it has been activated) followed by CloudAlly Restored folders, indicated by "Restored emails" and the date of the restore.

4.2.3.1 Email

- Select the Inbox to see its contents.

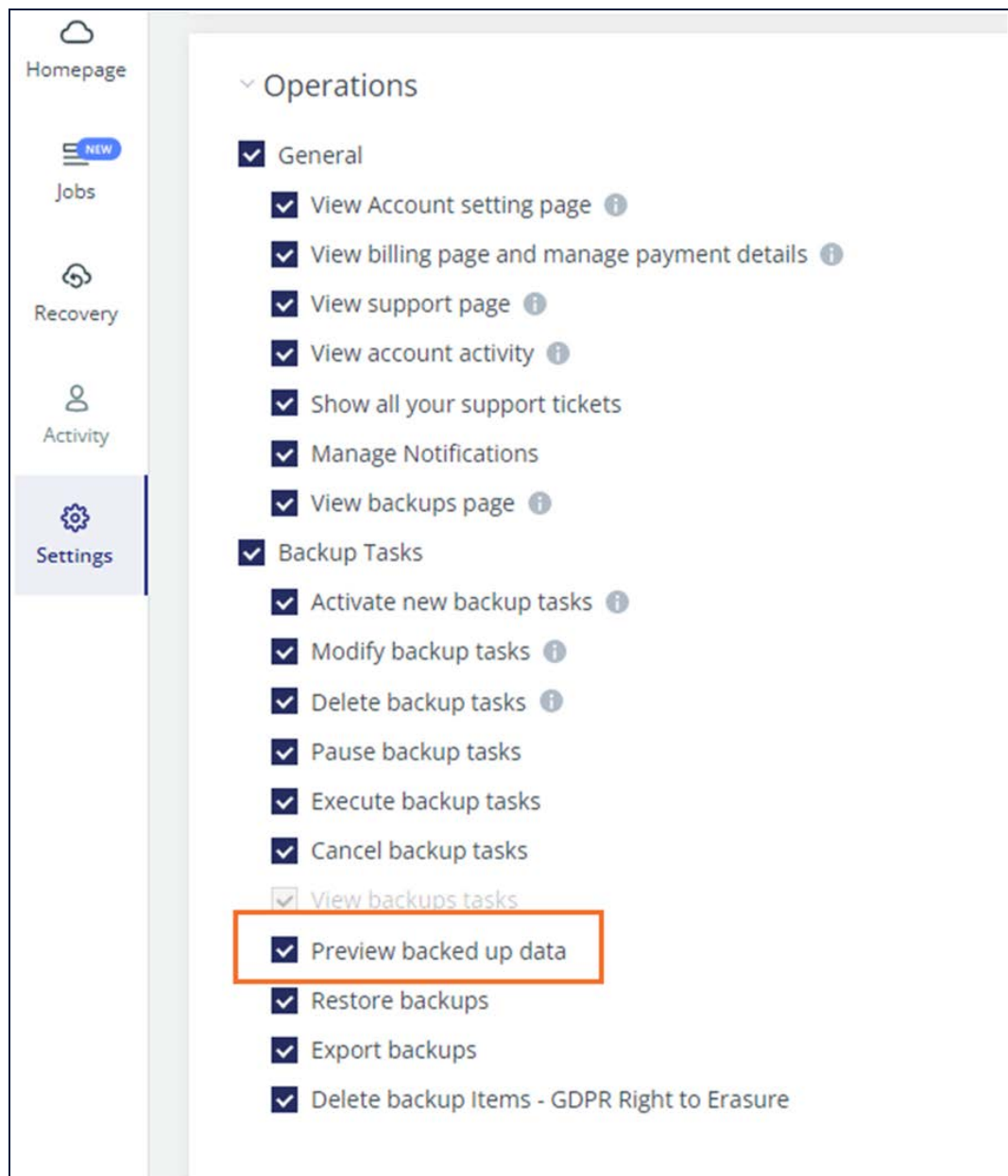


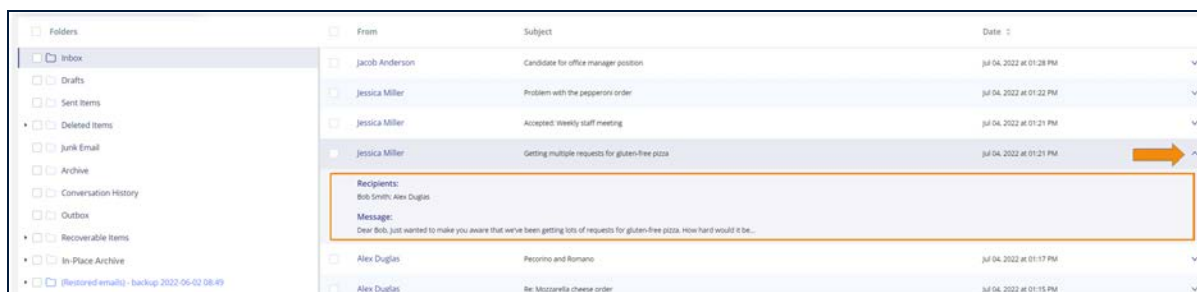
- You can choose one or more messages, or you can choose the entire Inbox.
 - To restore everything, all of the folders and their contents, click **Folders**.
 - Or, select the menu in the Email card, and then **Select All**.



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

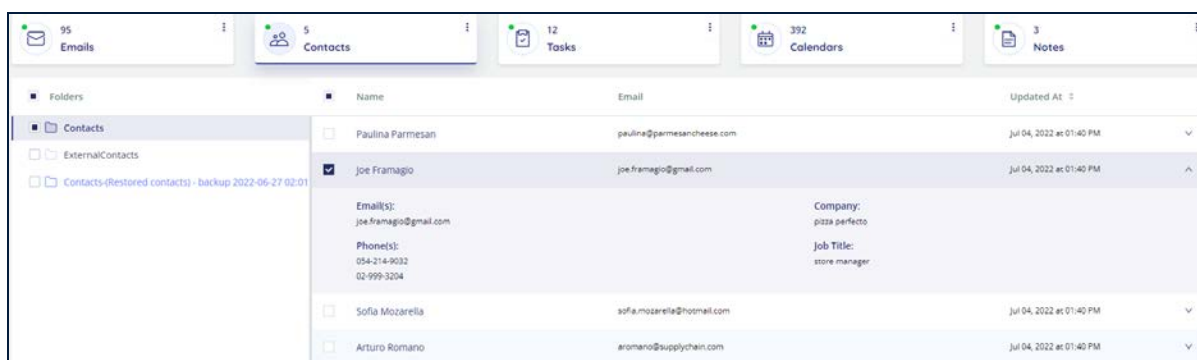
Note: The option to expand a sub-service item and view additional information, such as the first line of an email message, is only available for users with "Preview backed up data" permission. This feature is set by the backup account administrator.





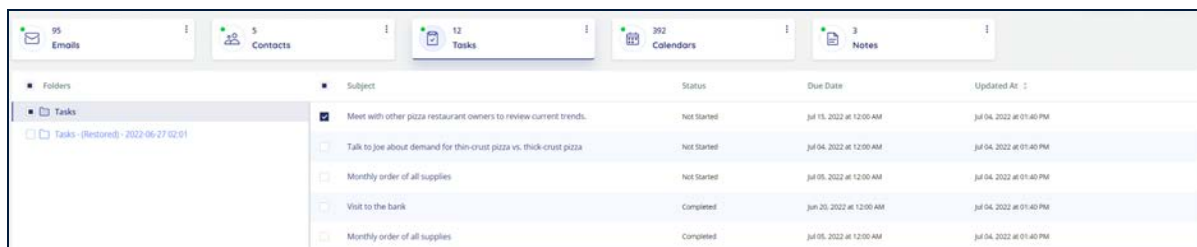
4.2.3.2 Contacts

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.



4.2.3.3 Tasks

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



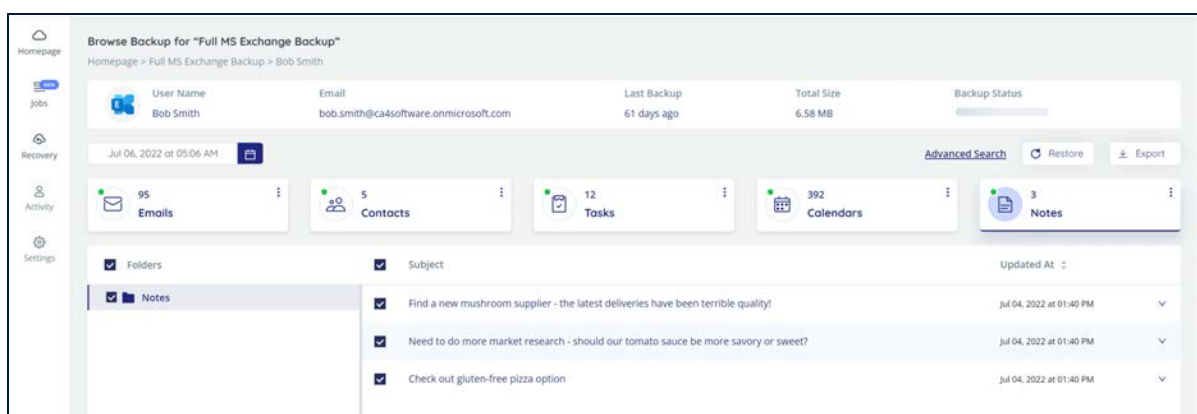
4.2.3.4 Calendar

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



4.2.3.5 Notes

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



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:

Selective Mailbox Restore for bob.smith@ca4software.onmicrosoft.com

Sub Services selection and configuration ⓘ

- ☒ Emails
- ☒ Contacts
- ☒ Tasks
- ☒ Calendars
- ☒ Notes

Restore Destination

- ☒ Restore to the original account
- ☐ Restore to another account ⓘ

Restore Type

Non-destructive restore ▼

- Non-destructive restore
- Replace restore
- Bypass restore

Separate, shadowing mailbox structure 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:** The restored items will be located in the same place as the existing items, not in a separate folder when you choose nondestructive restore.

- Deleted items and folders will be restored from the snapshot.
- Existing items will be overwritten with the snapshot version.
- **Use this option:** to restore or repair deleted / modified items
- **Bypass restore:** Restored content will be located in the same place as the existing items.
 - Deleted items and folders will be restored from the snapshot.
 - Existing items will be skipped.
 - **Use this option:** to restore deleted data

Restore Options

If you choose Replace Restore, the following options become available:

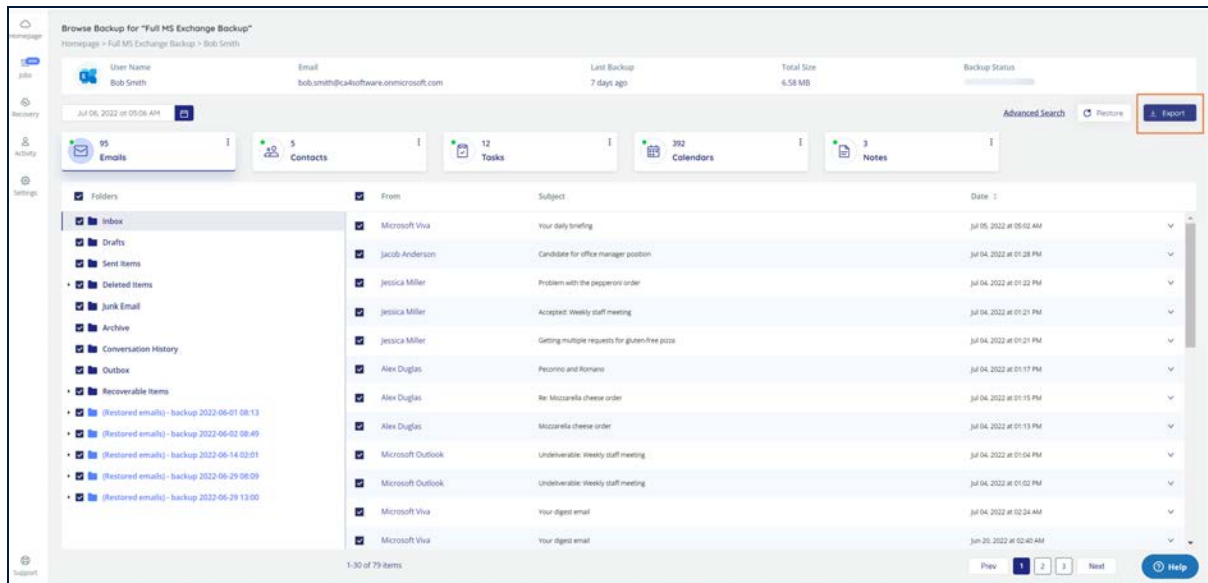
- Add a "restored..." tag to restored items, so you will be able to identify which items were added to your account.
- Add "restored..." to Outlook folders and calendars that the Restore process created.
- Create a snapshot of the restore endpoint prior to data upload - This is a local backup of the current contents of your account before the restore is implemented.

After you choose all of your **Restore** options, you can check the *Jobs* page to see the status of your job. See [Tracking Recovery Tasks on the Jobs Page](#) for details.

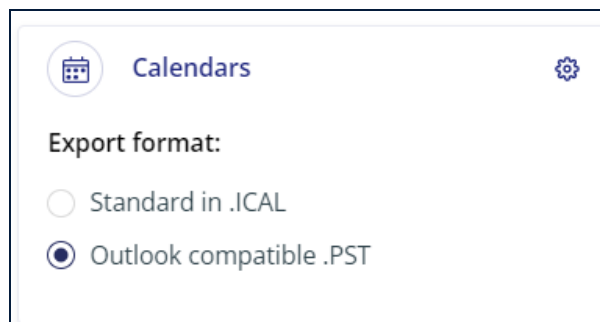
When the restore is complete, you will receive a notification email .

4.2.5 Export

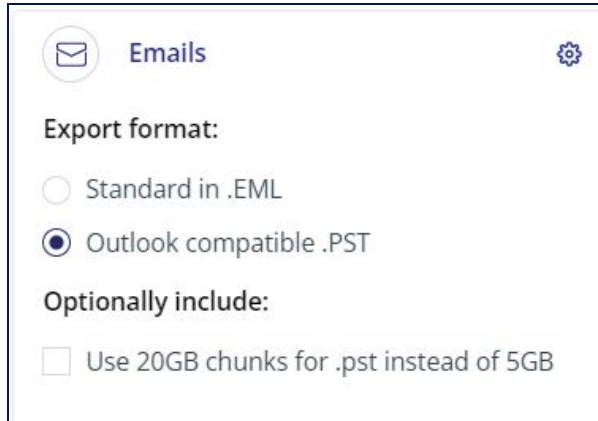
Once you select one or more items, the **Export** button becomes active. Click **Export**.





- 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 gear-shaped settings icon, 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.



 **Emails** 

Export format:

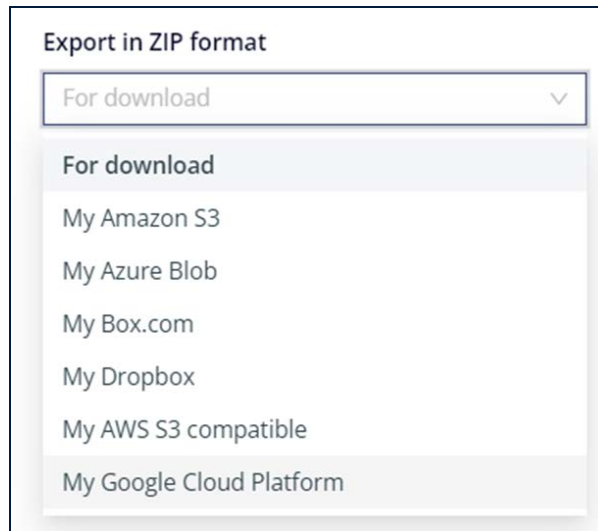
☐ Standard in .EML

☒ Outlook compatible .PST

Optionally include:

☐ Use 20GB chunks for .pst instead of 5GB

- The gear-shaped settings icon 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.



Export in ZIP format

For download ▼

For download

My Amazon S3

My Azure Blob

My Box.com

My Dropbox

My AWS S3 compatible

My Google Cloud Platform

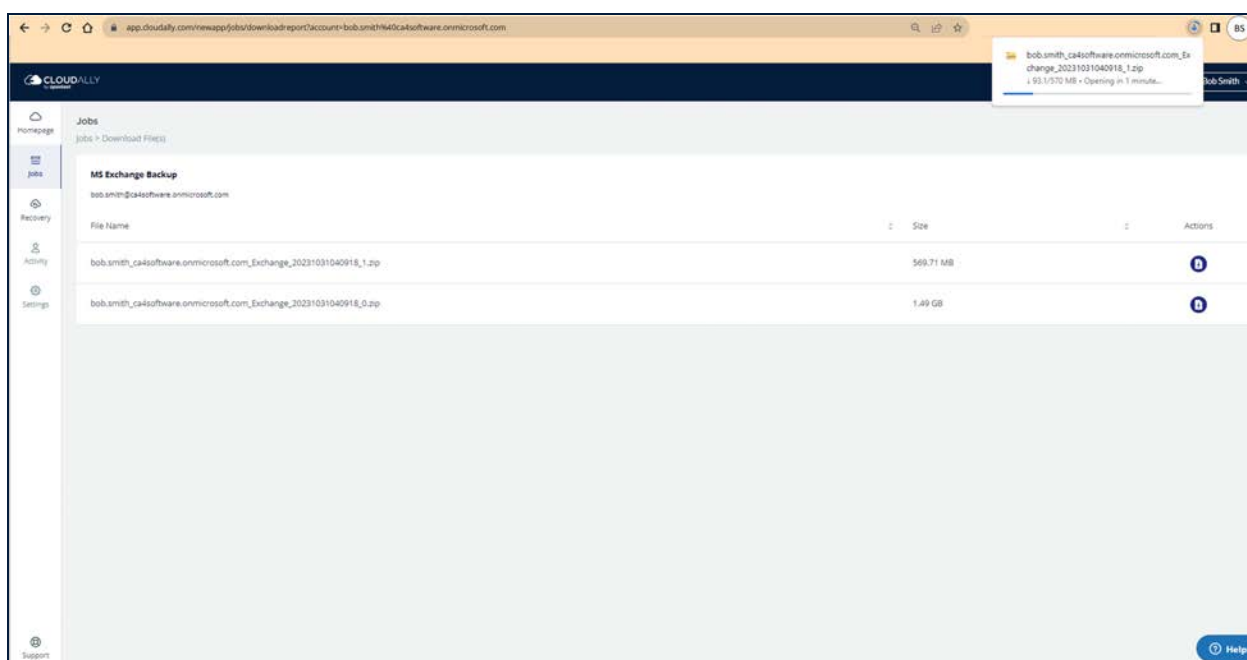
Note: The default "for download" option exports the file to your local storage device.

- Check the *Jobs* page to track the progress of your job. "Tracking Recovery Tasks on the Jobs Page" on page 88

- When the export is complete, click **Download Results**.

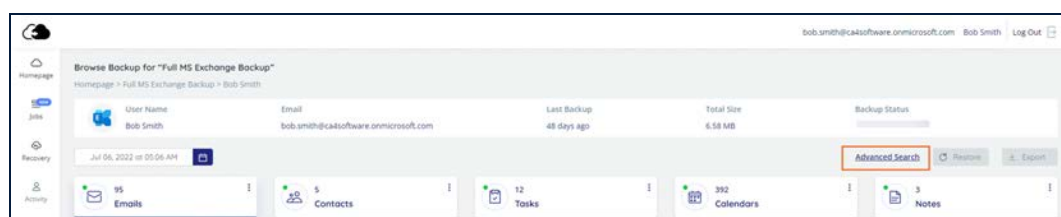


A new page will open which will enable you to download your data file.



4.2.6 Advanced Search

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



You will see the following screen:

The screenshot shows a web interface for restoring Microsoft Exchange backup data. The title is "Restore or download Microsoft Exchange Backup task: WidgetCo_Exchange". Below the title, it says "Restore & Download > WidgetCo_Exchange > bob.smith@ca4software.onmicrosoft.com". The main heading is "Please select your preferred choice for restore". There are two main options: "Via Snapshot" and "Via Item Search". The "Via Item Search" option is selected. Under "Via Item Search", there are radio buttons for "Email", "Contacts", "Tasks", "Calendars", and "Notes". The "Email" option is selected. Below these options is a search bar labeled "Search in Email" with a dropdown arrow. At the bottom of the search bar, it says "Press for advanced search". A "Continue" button is at the bottom of the page.

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

- **Email** – Enter a keyword in the Search for field. For advanced search options, click the down-arrow 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 the downward-facing arrow, 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

This procedure should be performed by a user with Administrator permissions.

1. Recreate all users in the Active Directory that have been deleted.
2. Recreate their mailboxes. Alternatively, restore the mailboxes to an existing user, but ensure that the users have a license with a mailbox.
3. From the Homepage, locate the Microsoft Exchange backup task you would like to restore, and then click the Recovery icon.
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. Select which sub-services to restore, or accept the default of restoring all services (recommended).
9. 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.
10. 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**.)
11. Check the *Jobs* page to track the progress of your job. After the restore task completes, you will receive a Confirmation Report by email.

12. 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 Microsoft Exchange mailboxes, please contact Support for assistance.

4.4 Recovering Microsoft 365 OneDrive and Microsoft 365 SharePoint

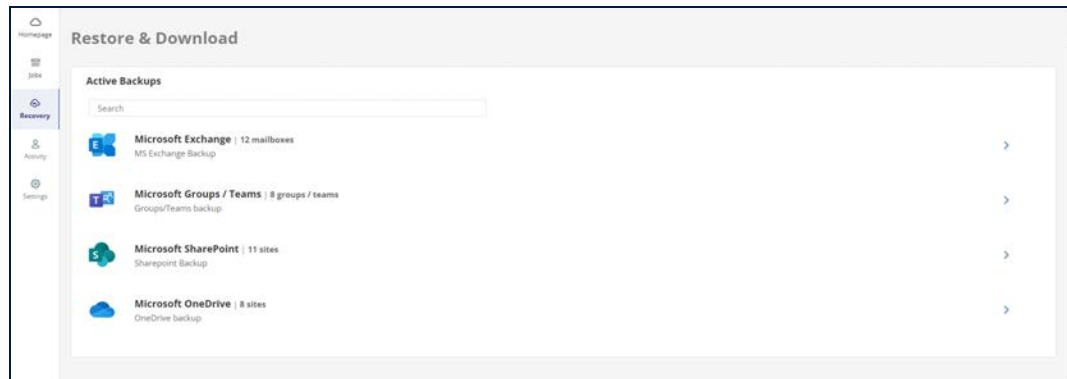
Note: The screens below are from a OneDrive recovery, but the functionality is identical for SharePoint.

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

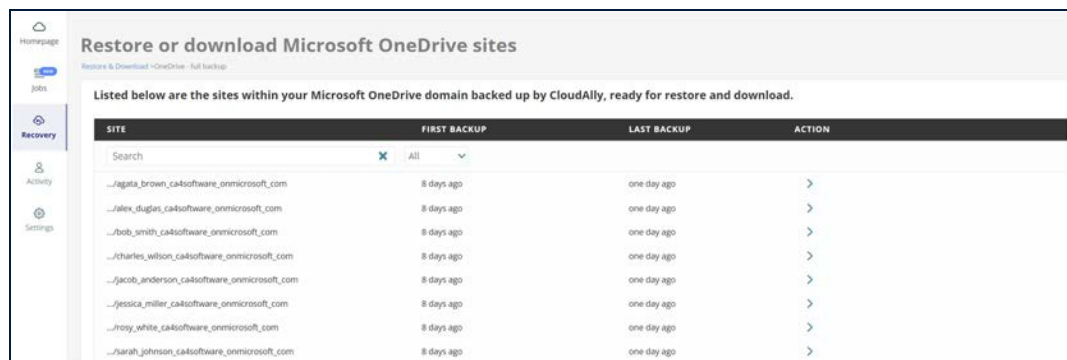
To recover your backed up data:

Note: In order to restore all data, CloudAlly assigns the backup user to be the site collection administrator. If CloudAlly is unable to do so (for example, because the user doesn't have proper permissions), then the user needs to be added manually.

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



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



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 arrow 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.

Restore or download Microsoft OneDrive Backup task: WidgetCo_OneDrive

Restore & Download > WidgetCo_OneDrive > ca4software-my.sharepoint.com/personal/agata_brown_ca4software_onmicrosoft_com

Please select your preferred choice for restore

☒ **Via Snapshot** ▼

A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.

Data changed from
Select date ▼

To
Select date ▼

☐ **Via Item Search** ▲

Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes (""). For example: "user@company.com" or "Important update".

[Continue](#)

- Select the radio button for your preferred restore method:

- [Via Snapshot](#)
- [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.

Restore or download from OneDrive - full backup archive

Restore & Download > OneDrive - full backup > ca4software-my.sharepoint.com/personal/agata_brown_ca4software_onmicrosoft_com/snapshots

From the archive list below select the relevant items, then click on "restore" to perform a non-destructive restore directly to the online service, or "download" to create a zip extract of the data.

DATE	SERVICE	ACTION
<input type="checkbox"/> Sep 6 2022 07:02 AM	Microsoft OneDrive	
<input type="checkbox"/> Sep 5 2022 07:04 AM	Microsoft OneDrive	
<input type="checkbox"/> Sep 4 2022 07:04 AM	Microsoft OneDrive	
<input type="checkbox"/> Sep 3 2022 07:01 AM	Microsoft OneDrive	
<input type="checkbox"/> Sep 2 2022 07:00 AM	Microsoft OneDrive	
<input type="checkbox"/> Sep 1 2022 07:04 AM	Microsoft OneDrive	
<input type="checkbox"/> Aug 31 2022 07:04 AM	Microsoft OneDrive	
<input type="checkbox"/> Aug 30 2022 07:04 AM	Microsoft OneDrive	
<input type="checkbox"/> Aug 29 2022 04:32 PM	Microsoft OneDrive	

View 1 - 9 of 9

Page 1 of 1

3. Alternatively, you can click the magnifying glass icon 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

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

- 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: The 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.

- 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?
 - Use this option to keep restored data separate, enabling manual drag & drop of items to relevant folders.

Note: The non-destructive restore option only works when you are restoring from OneDrive to a SharePoint sub-site, and the option to create a SharePoint sub-site is enabled in Microsoft.

- Or do you want to perform an **in-place restore**? You have three options for doing so:
 - **Replace:** The restored items will be located in the same place as the existing items, not in a separate folder when you choose nondestructive restore. Deleted items and folders will be restored from the snapshot. Existing items will be overwritten with the snapshot

version.

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

- **Bypass:** the restored content will be located in the same place as the existing items. Deleted items and folders will be restored from the snapshot. Existing items will be skipped.

Use this option: to restore deleted data.

- **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.

Use this option: to compare both versions of each file, to ensure the correct version is preserved.

- 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_com**

☐ 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

5. 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."](#)

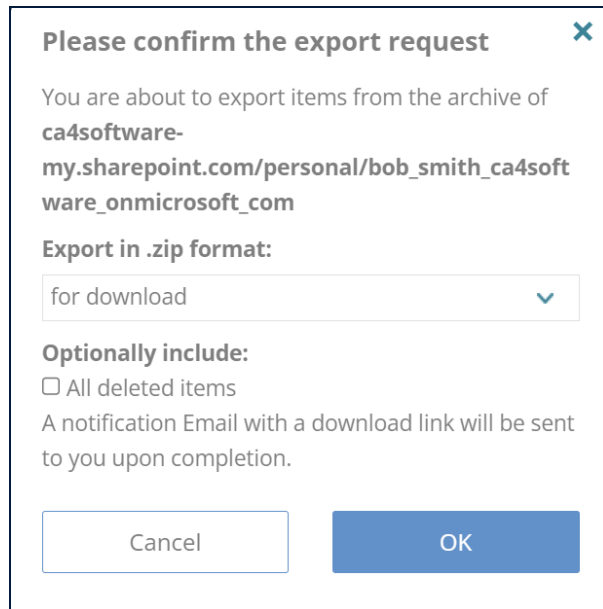
A Note About OneNote

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 items from the archive of
ca4software-my.sharepoint.com/personal/bob_smith_ca4software_onmicrosoft_com

Export in .zip format:

for download ▼

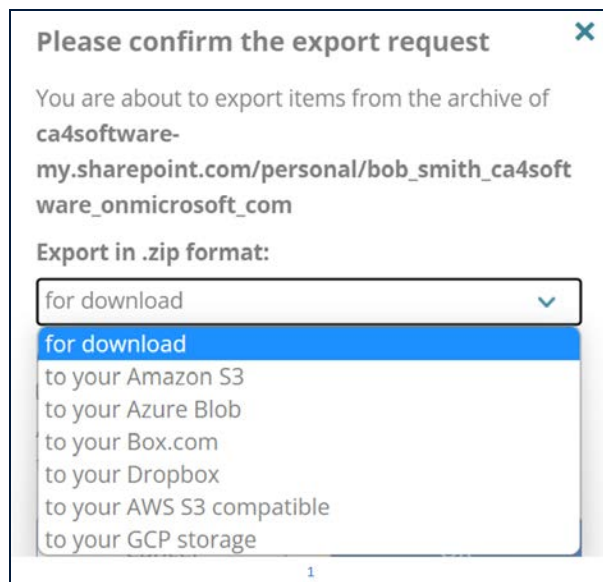
Optionally include:

☐ All deleted items

A notification Email with a download link will be sent to you upon completion.

Cancel OK

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_ca4software_onmicrosoft_com

Export in .zip format:

for download ▼

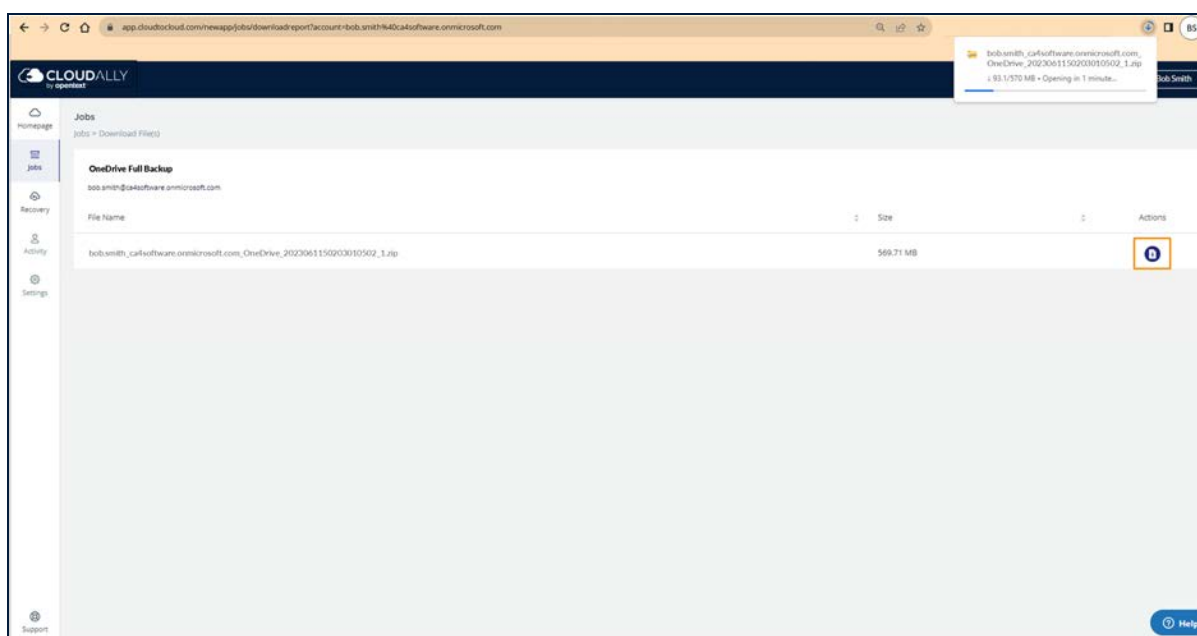
- for download
- to your Amazon S3
- to your Azure Blob
- to your Box.com
- to your Dropbox
- to your AWS S3 compatible
- to your GCP storage

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 ["Tracking Recovery Tasks on the Jobs Page."](#)) When the task is completed, the **Download Results** button will be active.

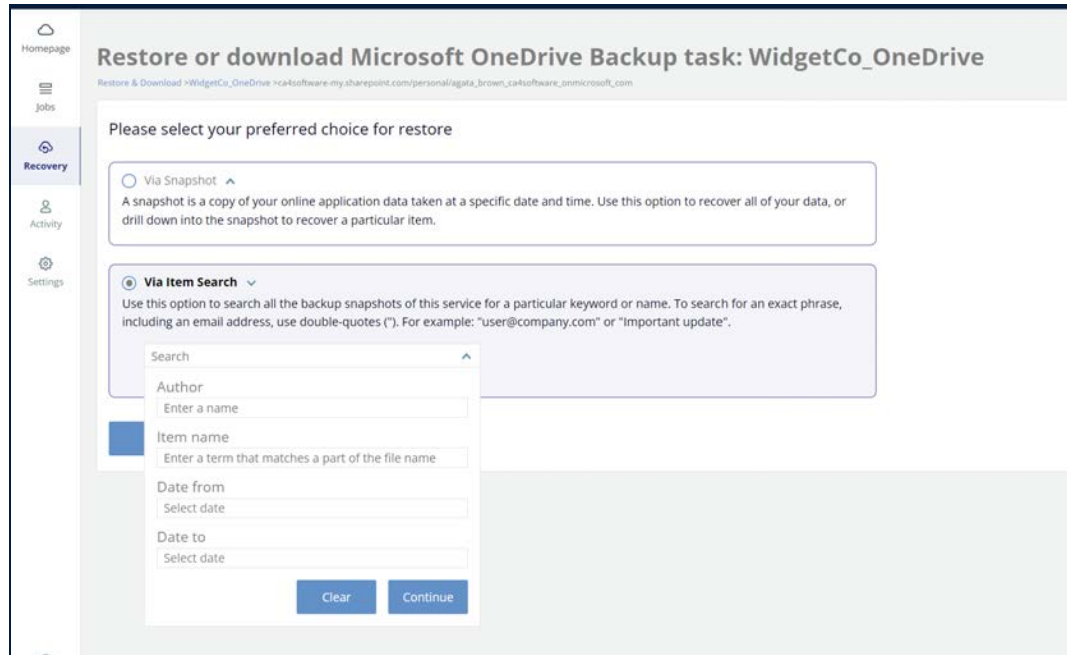


6. Click **Download Results**, and a page will open, where you can access your backup file.



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 for.
2. Or, click the arrow to the right of the search bar, and enter search criterion in any of the Advanced fields: Author, filename or date.



Restore or download Microsoft OneDrive Backup task: WidgetCo_OneDrive

Please select your preferred choice for restore

☐ Via Snapshot

A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.

☒ Via Item Search

Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes (""). For example: "user@company.com" or "Important update".

Search

Author
Enter a name

Item name
Enter a term that matches a part of the file name

Date from
Select date

Date to
Select date

Clear Continue

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 [Restore](#) or [Export/Download](#) 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 arrow 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. Go 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 arrow 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. Go 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.

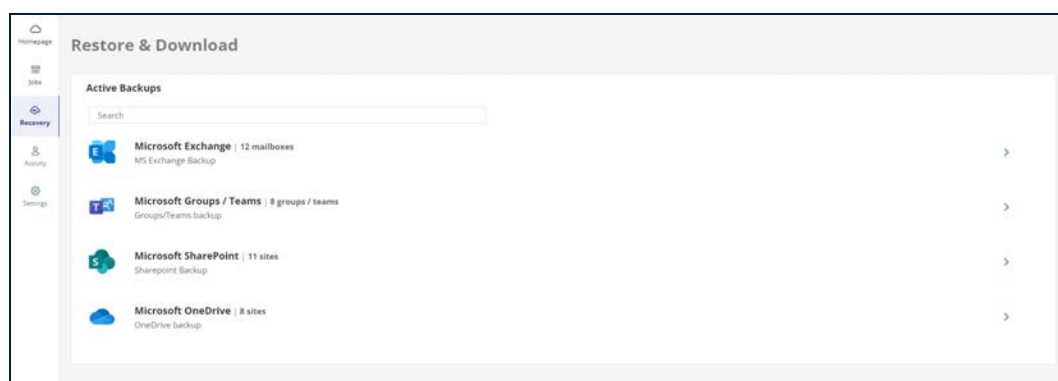
Note: You will receive an email notification when the restore is complete, and you can view the status from the *Jobs* page.

4.5 Recovering Microsoft 365 Teams & Groups

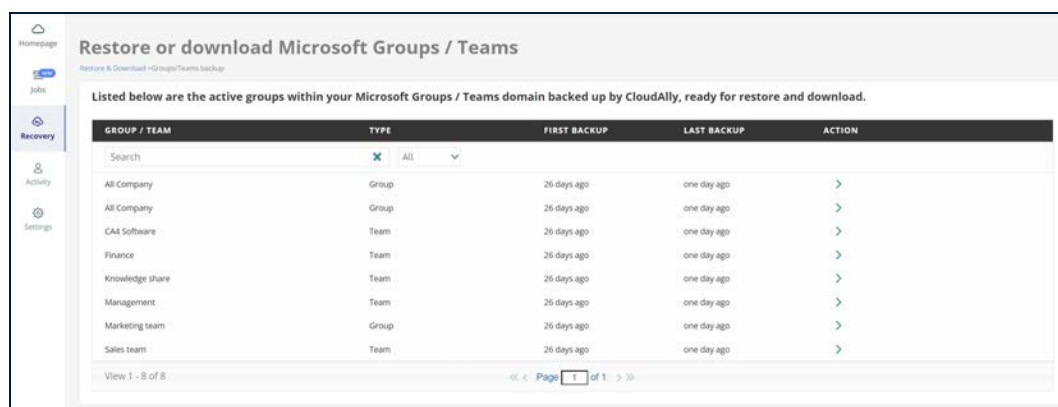
The Recovery Menu provides you with options at a fine granularity for selecting which account, team or site to restore or export.

To recover your backed up Teams & Groups data:

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



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



This page displays all of your backed up Teams & Groups, with 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 arrow icon at the end of the line of the group or team which you want to restore or export (download).

The *Restore or download Groups/Teams* page is displayed.

The screenshot shows a web interface for restoring or downloading Microsoft Groups/Teams backup data. The title bar reads 'Restore or download Microsoft Groups / Teams Backup task: WidgetCo_Groups/Teams'. Below the title, there's a subtitle 'Restore & Download - WidgetCo_Groups/Teams - Finance'. The main content area is titled 'Please select your preferred choice for restore'. There are two radio buttons: 'Via Snapshot' (selected) and 'Via Item Search'. The 'Via Snapshot' section includes a description: 'A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.' It also has two date pickers: 'Data changed from' and 'To', both with 'Select date' dropdowns. The 'Via Item Search' section includes a description: 'Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes (""). For example: "user@company.com" or "important update".' At the bottom of the form is a blue 'Continue' button.

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

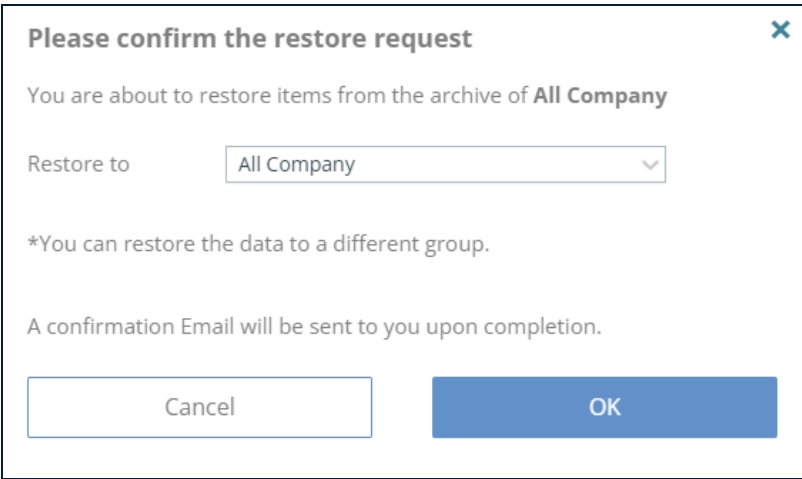
4.5.1 Restore or Download Via Snapshot

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 the restore request ✕

You are about to restore items from the archive of **All Company**

Restore to

*You can restore the data to a different group.

A confirmation Email will be sent to you upon completion.

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:

Restore or download Microsoft Groups / Teams Backup task: WidgetCo_Groups/Teams

Restore & Download ->WidgetCo_Groups/Teams ->Finance

Please select your preferred choice for restore

☐ Via Snapshot

A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.

☒ Via Item Search

Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes ("). For example: "user@company.com" or "Important update".

☒ Conversation

☐ Site

☐ Calendars

☐ Channels

Search in Conversation

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 [Restore](#) or [Export/Download](#) 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.

4.6.1 First Step: Restore a Public Channel

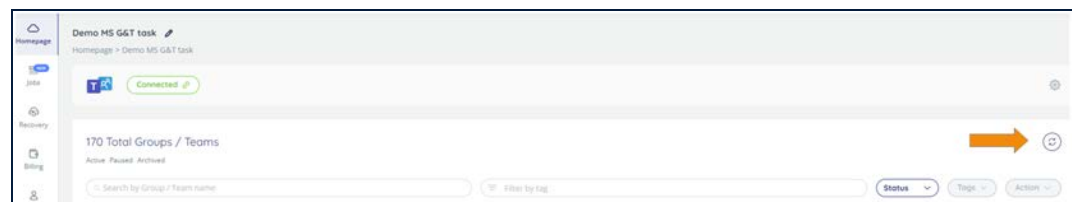
Note: Private channels need to be exported and then restored.

1. Click **Recovery** from the Navigation Panel. The *Restore & Download page* is displayed with all your active-backup account details.
2. 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.
3. Locate the Team (not the Group – that will come later) that you would like to restore. Click the arrow at the end of the row. The *Restore or download Microsoft Groups/Teams task page* is displayed.
4. By default, **Via Snapshot** is selected. 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.
5. Locate the most recent Channel backup prior to the ransomware attack and select it. Go to the bottom of the page, click **Restore**, and then click **OK**.

Note: This is a non-destructive restore – the data will be placed into a newly created Team called (Restored [date]).

6. Check the *Jobs* page to determine when the restore is complete.
7. 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 to display the newly restored Team. You will need to perform the following steps.

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



4.6.2 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 **Recovery** 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. Go to the bottom of the page and click **Restore**.
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.

4.6.3 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 **Recovery** 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. Go to the bottom of the page and click **Restore**.
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 remaining sub-services.

4.7 Tracking Recovery Tasks on the Jobs Page

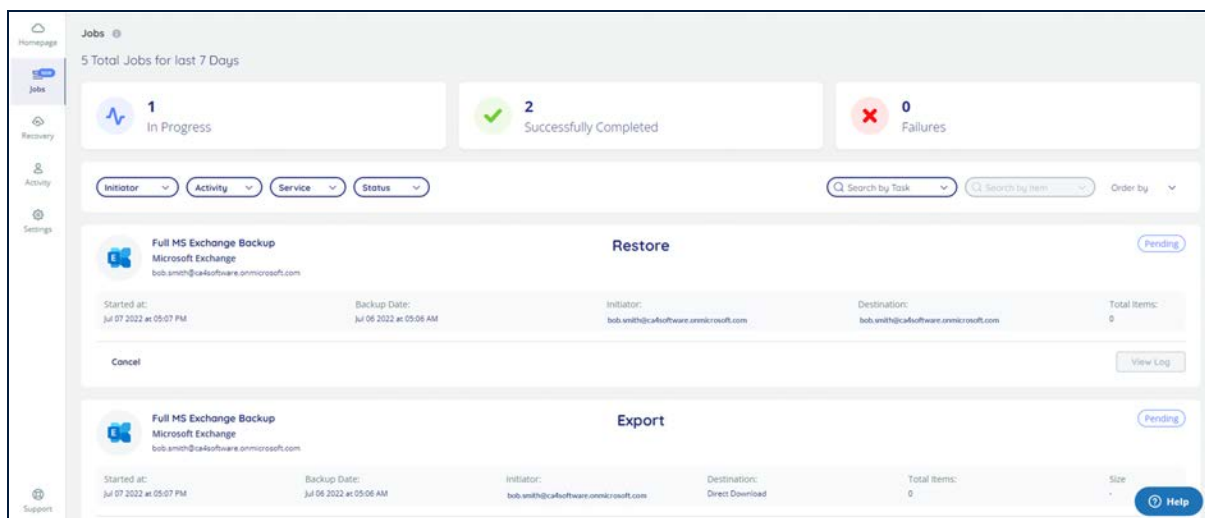
The *Jobs* page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

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:

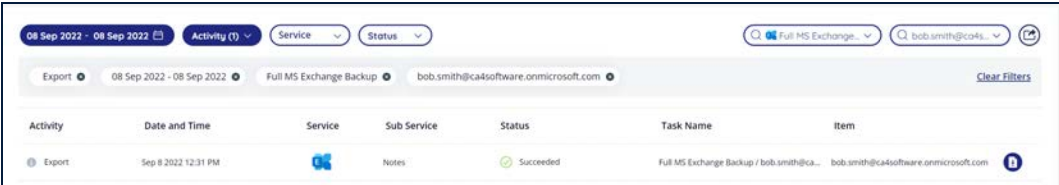
- **Initiator:** Who initiated the backup / restore?
- **Activity:** Filter by restores or exports.
- **Service:** Filter by one of the following services, such as:
 - Microsoft Exchange
 - Microsoft SharePoint
 - Microsoft Groups / Teams
 - Microsoft OneDrive
 - Google Workspace
 - Google Shared Drives
 - Salesforce
 - Box
 - Dropbox
 - Google Account
- **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
 - OneDrive
 - 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 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.

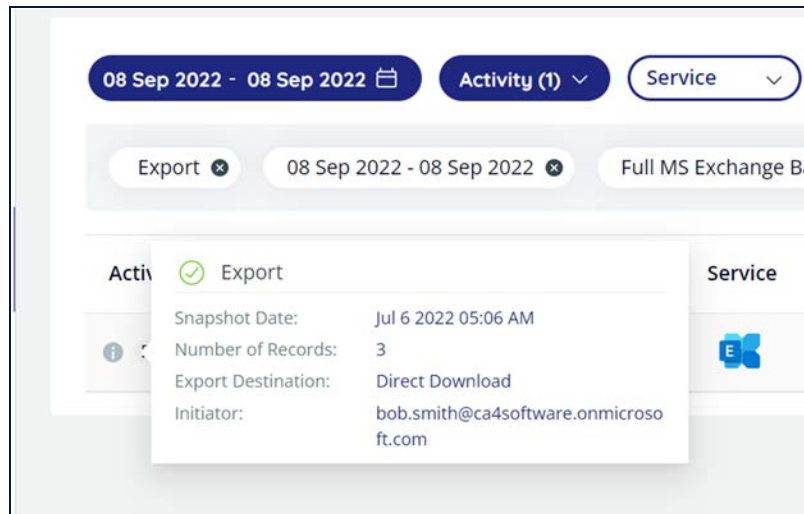


The screenshot shows a web interface for managing Microsoft 365 backups. At the top, there are filters for date range (08 Sep 2022 - 08 Sep 2022), activity type (Activity), service (Full MS Exchange Backup), and status (Succeeded). Below the filters is a table with columns: Activity, Date and Time, Service, Sub Service, Status, Task Name, and Item. The table contains one row showing an 'Export' activity performed on 'Sep 8 2022 12:31 PM' by 'bob.smith@ca4software.onmicrosoft.com' for 'Full MS Exchange Backup'. An information icon (i) is visible in the 'Item' column.

Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
Export	Sep 8 2022 12:31 PM	Full MS Exchange Backup	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 the information icon in the **Activity** column. The **Info** pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution:

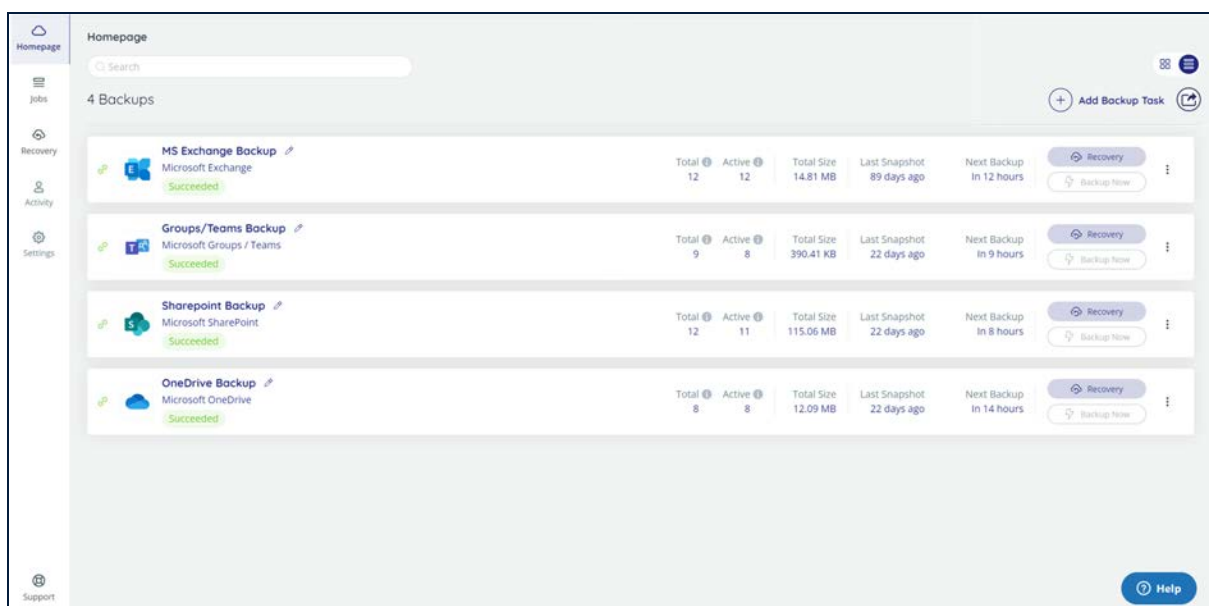


5 Filtering and Viewing Drill-Down Details

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.



2. Click the desired service from the list or enter a keyword in the Search field to find a specific task. The specific service's backup page is displayed.

This page displays all the accounts, teams, or sites available for the account you are using. The page displays the details such as:

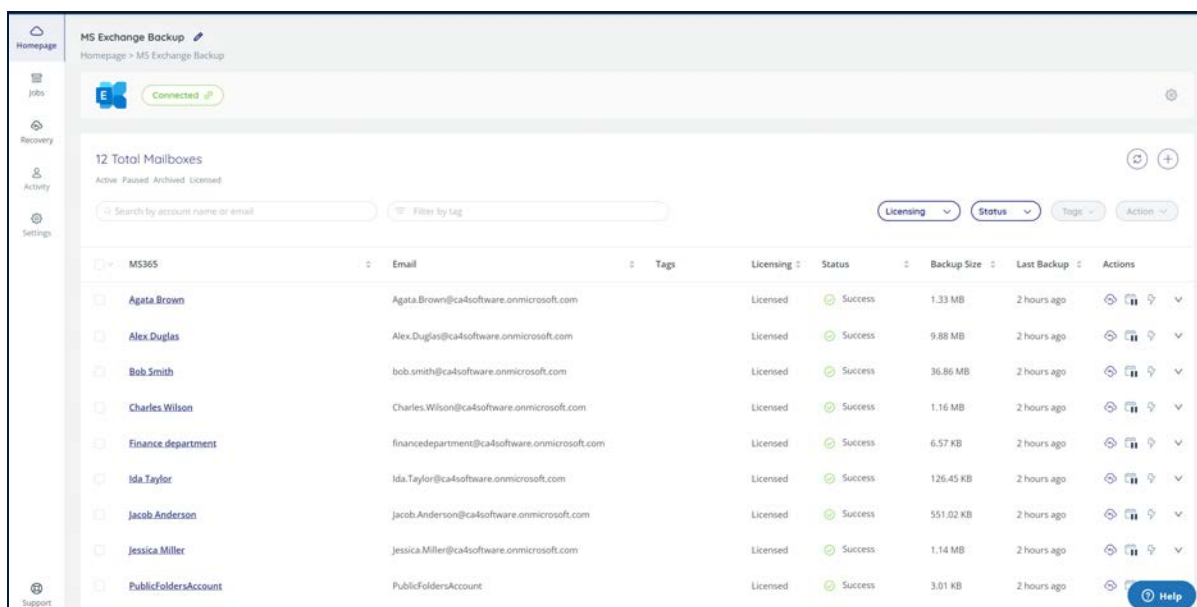
- **Microsoft Exchange:** Mailbox name, Email, Microsoft Licensed / Unlicensed, Status, Backup Size, and Last Backup date
- **Microsoft Teams & Groups:** Group/Team Name, Type (Group or Team), Tags, Status, Backup Size, and Last Backup date
- **Microsoft SharePoint and OneDrive:** Site name, Tags, Status, 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, Statuses, or Licensing

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.
- For Microsoft Exchange only: Filter by whether the mailboxes are Microsoft Licensed or Unlicensed.
- Filter by statuses such as Not Active, Scheduled, Success, In Process, Failed, Paused, Archived, or Partial.



The screenshot displays the 'MS Exchange Backup' interface. At the top, it shows '12 Total Mailboxes' and a search bar. Below the search bar, there are filters for 'Licensing' and 'Status'. The main table lists the following mailboxes:

MS365	Email	Tags	Licensing	Status	Backup Size	Last Backup	Actions
Agata Brown	Agata.Brown@ca4software.onmicrosoft.com		Licensed	Success	1.33 MB	2 hours ago	
Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com		Licensed	Success	9.88 MB	2 hours ago	
Bob Smith	bob.smith@ca4software.onmicrosoft.com		Licensed	Success	36.86 MB	2 hours ago	
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com		Licensed	Success	1.16 MB	2 hours ago	
Finance department	financedepartment@ca4software.onmicrosoft.com		Licensed	Success	6.57 KB	2 hours ago	
Ida Taylor	Ida.Taylor@ca4software.onmicrosoft.com		Licensed	Success	126.45 KB	2 hours ago	
Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com		Licensed	Success	551.02 KB	2 hours ago	
Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com		Licensed	Success	1.14 MB	2 hours ago	
PublicFoldersAccount	PublicFoldersAccount		Licensed	Success	3.01 KB	2 hours ago	

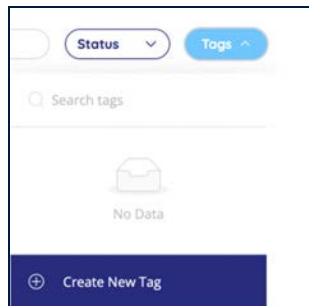
5.1.2 Filtering Using Tags

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 mailboxes, accounts, or sites that belong to Managers, or all those that belong to the Sales Team.

You can use tags to quickly filter your list of mailboxes, accounts 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.

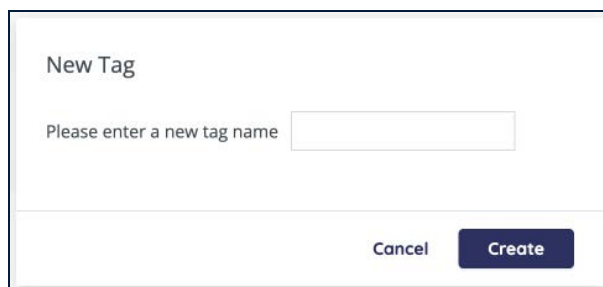


3. To search your existing tags, enter a tag name in the **Search tags** field.

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.



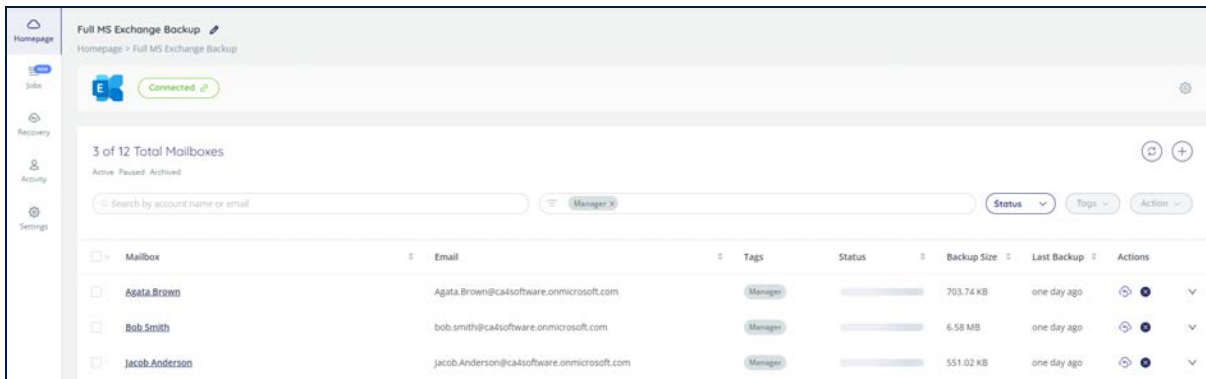
2. Enter a new tag name and click **Create**.

To apply tags to your accounts, teams or sites:

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

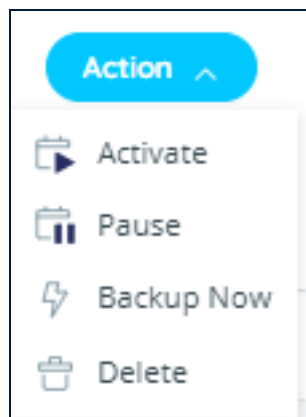
5.1.4 Filtering by Tag

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



5.1.5 Actions

To perform actions on an 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:

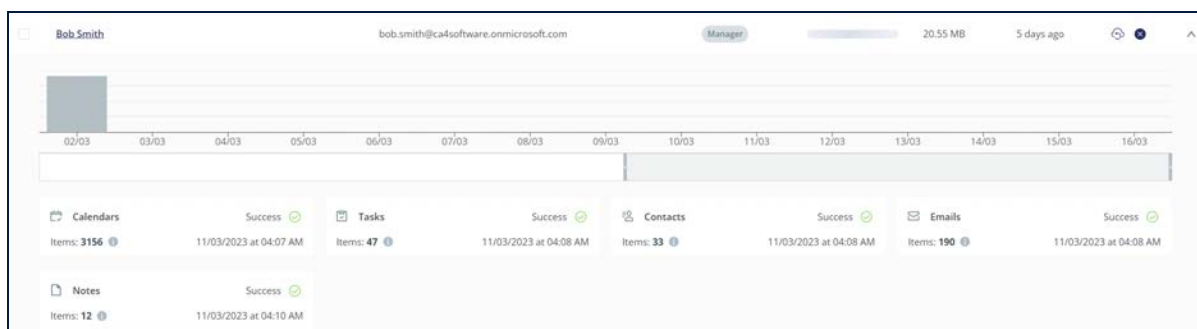


- **Activate** enables backup in all the selected account, team or sites.
- **Pause** halts the backup procedures on the selected account, team or sites.
- **Backup now** starts the backup immediately. The backup in this case starts as soon as a backup processing machine is available, which may take 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 arrow button at the end of the row. This option enables you to drill down to the backup history dashboard.



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

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.

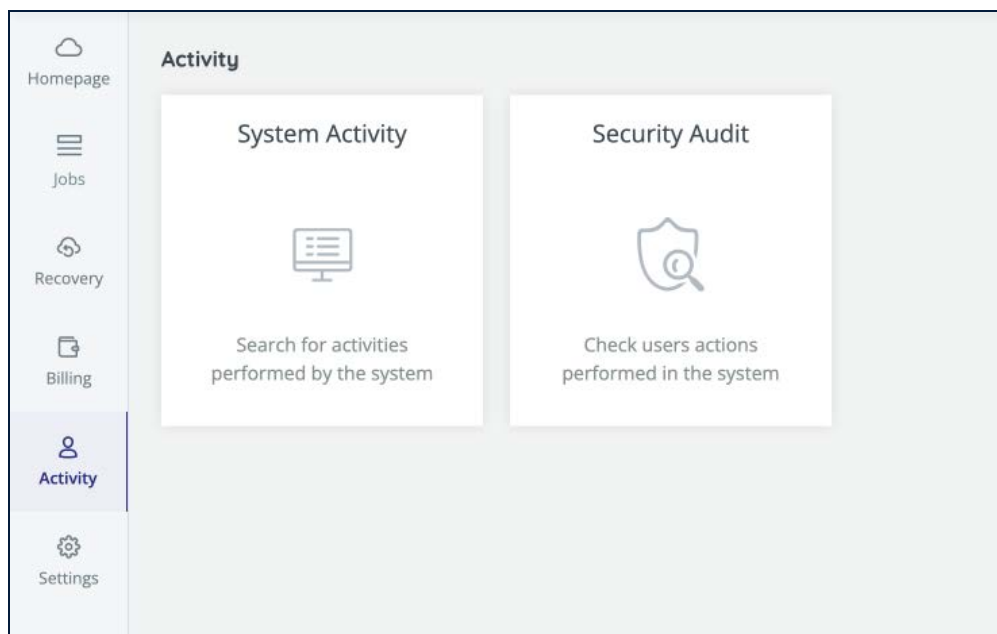
The summary tiles below the chart provide at-a-glance information about the backup: for each sub-service, they display the total number of items in the backup, the date of the last backup, and the outcome.

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.

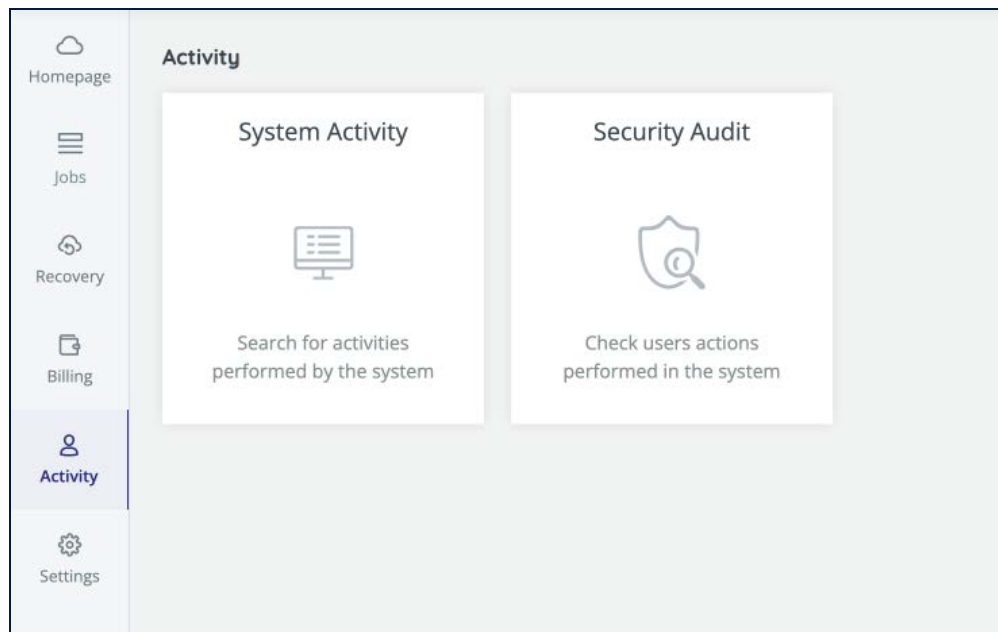
6.1 Viewing Account Activity

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



6.1.1 System Activity

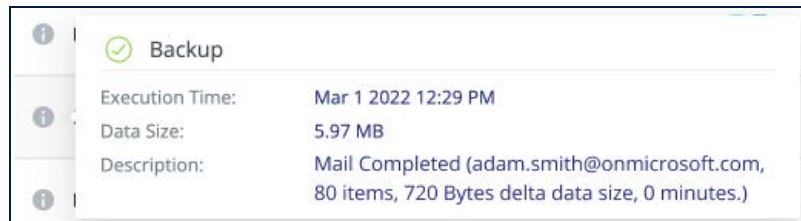
Click **System Activity**.



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	Activity					
Jobs	Activity > System activity					
Recovery	<div> <div>Start date - End date</div> <div>Activity</div> <div>Service</div> <div>Status</div> </div> <div>Search by Task name Search items</div>					
Activity	Activity	Date and Time	Service	Sub Service	Status	Task Name Item
Settings	Export	Jul 12 2022 04:08 PM	Calendars		Succeeded	Full MS Exchange Backup / bob.smith@ca... bob.smith@ca4software.onmicrosoft.com
Support	Backup	Jul 11 2022 01:01 PM			Succeeded	Sharepoint backup .../sites/AltaroRestored_Shared_mailbox_2021_08_31_11_05
	Export	Jul 11 2022 01:00 PM	Channels		Succeeded	Full Teams Backup / AltaroRestored_Linda... AltaroRestored_Linda_Fuller_2021_08_31_05_36
	Restore	Jul 11 2022 01:00 PM			Succeeded	One Drive / cloudally1-my.sharepoint.co... /Zsepo_kazandev_pro
	Backup	Jul 11 2022 05:04 AM	Calendars		Failed	Full MS Exchange Backup Mila.Scott@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Jacob.Anderson@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Agata.Brown@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Alex.Duglas@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Sarah.Johnson@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Jessica.Miller@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup Charles.Wilson@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 the Info icon. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution:



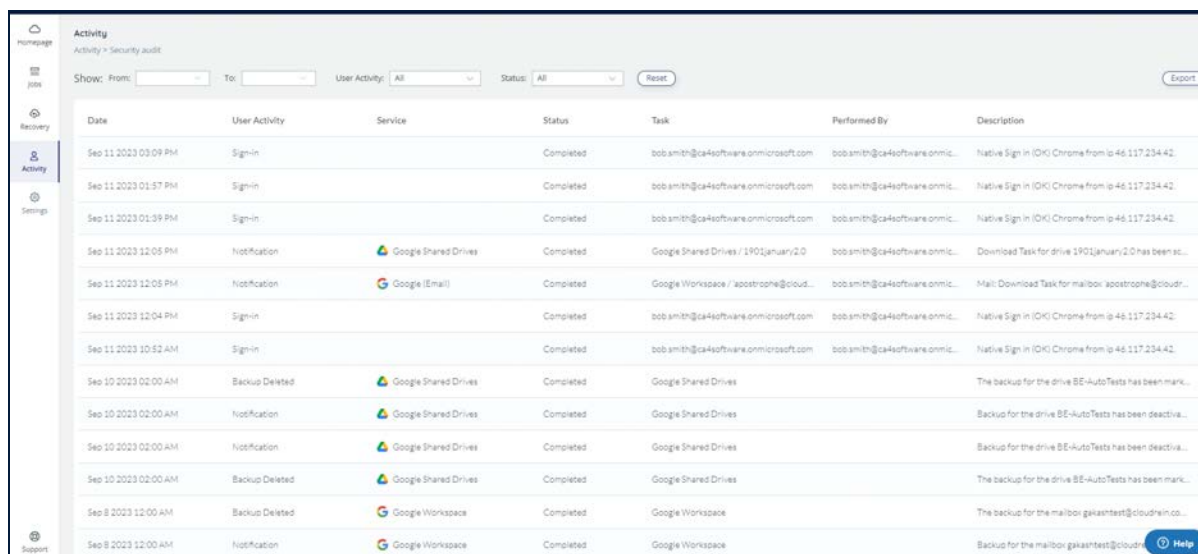
Note: Administrators can grant users permission to see the *System Activity* page by clicking **Settings > User Management**, and checking "View Account Activity."

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.



The screenshot shows the 'Activity' page in the Microsoft 365 Security Center. The page title is 'Activity > Security audit'. Below the title, there are filters for 'Show: From', 'To', 'User Activity', and 'Status', along with a 'Reset' button and an 'Export' button. The main content is a table with the following columns: Date, User Activity, Service, Status, Task, Performed By, and Description. The table contains 15 rows of activity logs, including sign-in events, notifications, and backup deletions for various services like Google Shared Drives and Google Workspace.

Date	User Activity	Service	Status	Task	Performed By	Description
Sep 11 2023 03:09 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (OK) Chrome from ip-46.117.234.42
Sep 11 2023 01:57 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (OK) Chrome from ip-46.117.234.42
Sep 11 2023 01:39 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (OK) Chrome from ip-46.117.234.42
Sep 11 2023 12:05 PM	Notification	Google Shared Drives	Completed	Google Shared Drives / 1901January2.0	bob.smith@ca4software.onmic...	Download Task for drive 1901January2.0 has been sc...
Sep 11 2023 12:05 PM	Notification	Google (Email)	Completed	Google Workspace / apocrophe@cloud...	bob.smith@ca4software.onmic...	Mail: Download Task for mailbox apocrophe@cloud...
Sep 11 2023 12:04 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (OK) Chrome from ip-46.117.234.42
Sep 11 2023 10:52 AM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (OK) Chrome from ip-46.117.234.42
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 8 2023 12:00 AM	Backup Deleted	Google Workspace	Completed	Google Workspace		The backup for the mailbox gikaintest@cloudnine.co...
Sep 8 2023 12:00 AM	Notification	Google Workspace	Completed	Google Workspace		Backup for the mailbox gikaintest@cloudn...

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

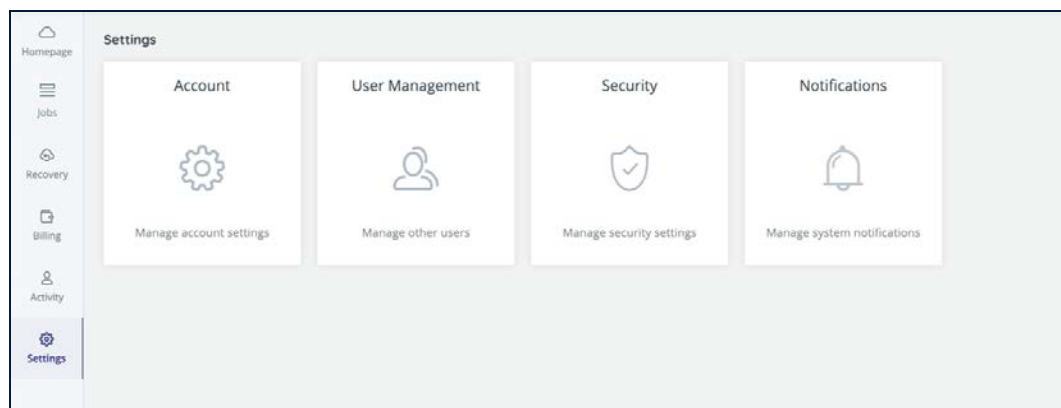
Note: Administrators can grant users permission to see the *Security Audit* page by clicking **Settings > User Management**, and checking "View Security Audit Page."

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.

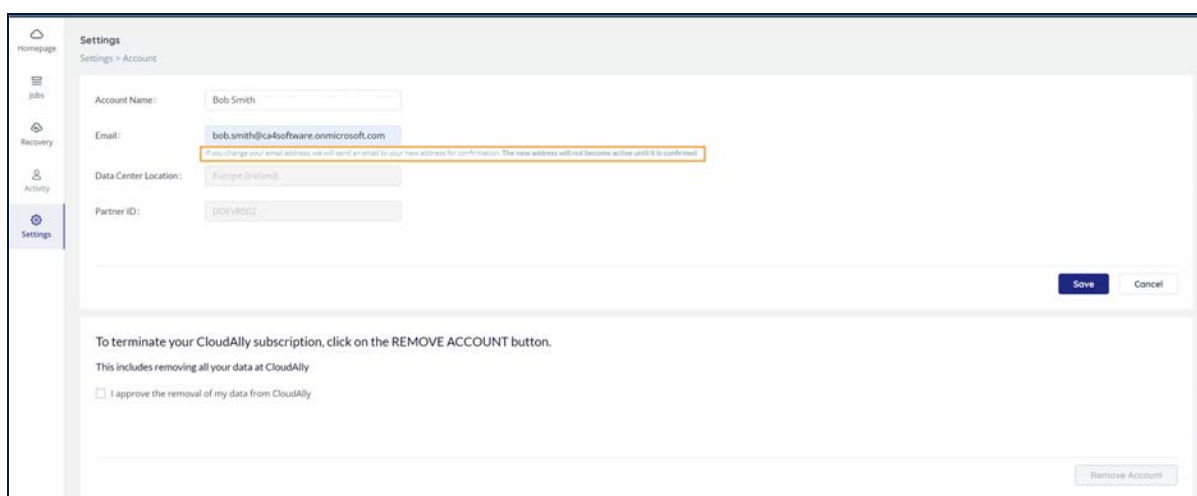


6.2.1 Account Settings

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 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.



You can update the Account Name and/or Email.

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

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

The screenshot shows the 'Settings > Account' page. On the left is a navigation menu with 'Settings' selected. The main content area has the following fields: 'Account Name' with the value 'Bob Smith'; 'Email' with the value 'Bob.smith@ca4software.onmicrosoft.com'; and 'Data Center Location' with the value 'US East (Northern Virginia)'. To the right of the 'Email' field, there is a section for 'New Email - Waiting for Approval' showing 'username@company.com' with a 'Discard' link. Below this, a note states: 'Confirmation was sent to your new email username@company.com and is waiting for your approval.' with a 'Resend Email Confirmation' link. At the bottom right are 'Save' and 'Cancel' buttons.

6.2.2 Canceling Your Subscription

To cancel your subscription:

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

The screenshot shows a modal window titled 'Are you sure?'. Inside the modal, there is a text input field containing 'I approve the removal of my data from CloudAlly'. At the bottom right of the modal are two buttons: 'YES' and '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, all 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.

The screenshot shows the 'Settings > User Management' page. It includes a header with the title 'Settings' and breadcrumb 'Settings > User Management'. Below this, a message states: 'The following external credentials are currently linked to your CloudAlly account. You can remove the credentials anytime if you prefer to use only your CloudAlly sign-in credentials.' To the right of this message is a button with a plus icon and the text 'Add new user'. Below the message is a table with three columns: 'Email', 'Type', and '2FA Authentication'. The table contains three rows of user data. At the bottom of the table, it says 'Page 1 of 1' and 'Showing 1-3 of 3'.

Email	Type	2FA Authentication
m.steward@cloudally.com	Email	
j.armstrong@cloudally.com	Email	
kristen_hall@cloudally.com	Email	

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

Settings
Settings > User Management > New user

Email: Type:

Password: Role:

Operations

- ☐ General
 - [View Account setting page](#)
 - [View billing page and manage payment details](#)
 - [View billing notification messages](#)
 - [View support page](#)
 - [View account activity](#)
 - [View security audit page](#)
 - [Manage Notifications](#)
 - [View backups page](#)
- ☐ Backup Tasks
 - [Activate new backup tasks](#)
 - [Modify backup tasks](#)
 - [Delete backup tasks](#)
 - [Pause backup tasks](#)
 - [Execute backup tasks](#)

Services

- ☐ All
 - ☐ Microsoft Exchange
 - ☐ Microsoft Groups / Teams
 - ☐ Microsoft SharePoint
 - ☐ Microsoft OneDrive
 - ☐ Google Account
 - ☐ Salesforce
 - ☐ Dropbox Business
 - ☐ Box
 - ☐ Google Workspace
 - ☐ Google Shared Drives

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

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

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

Settings
Settings > User Management

The following external credentials are currently linked to your CloudAlly account
You can remove the credentials anytime if you prefer to use only your CloudAlly sign-in credentials

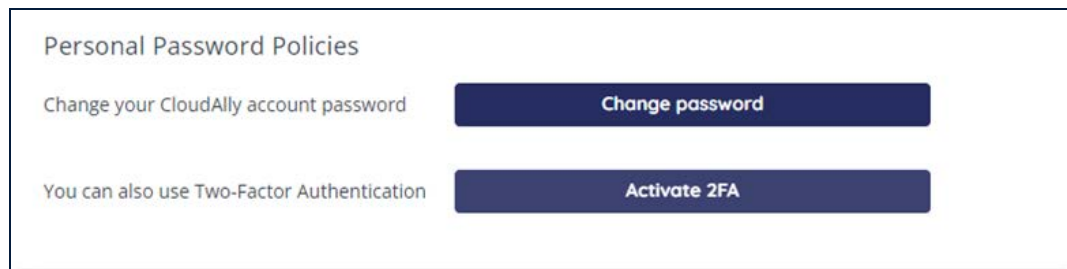
A confirmation message has been sent to jessica.miller@ca4software.onmicrosoft.com. Follow the link in the message to confirm the new address.

	Type	2FA Authentication	
jessica.miller@ca4software.onmicrosoft.com	Email	<input type="checkbox"/>	
jessica.miller@ca4software.onmicrosoft.com	Email	<input type="checkbox"/>	Resend Email Confirmation
Sarah.Johnson@ca4software.onmicrosoft.com	Email	<input type="checkbox"/>	

Page 1 of 1

6.4 Security Settings

The *Security Settings* page enables you to:



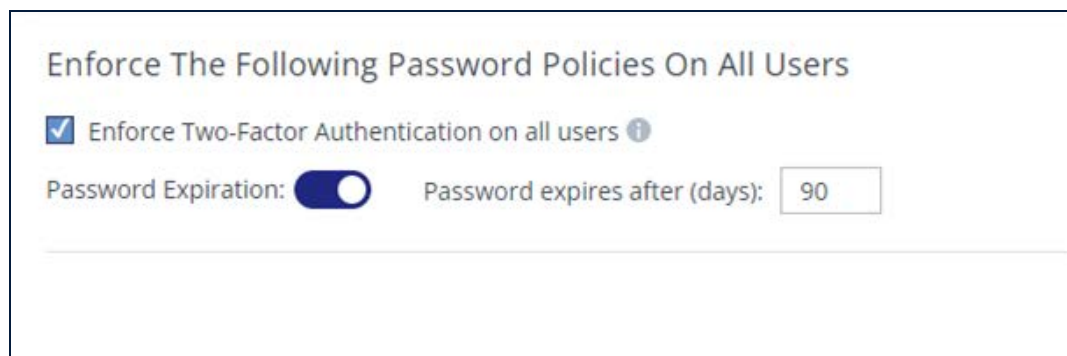
Personal Password Policies

Change your CloudAlly account password [Change password](#)

You can also use Two-Factor Authentication [Activate 2FA](#)

- Update your password
- Set up two-factor authentication

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



Enforce The Following Password Policies On All Users

☒ Enforce Two-Factor Authentication on all users ⓘ

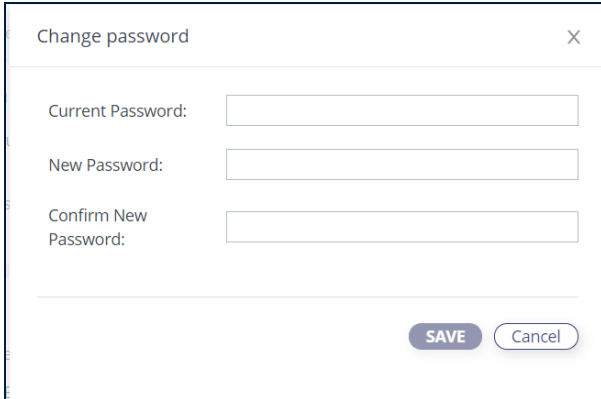
Password Expiration: ☒ Password expires after (days):

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

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.

A screenshot of a 'Change password' pop-up dialog box. The dialog has a title bar with 'Change password' and a close button (X). It contains three text input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom right, there are two buttons: 'SAVE' (highlighted in blue) and 'Cancel'.

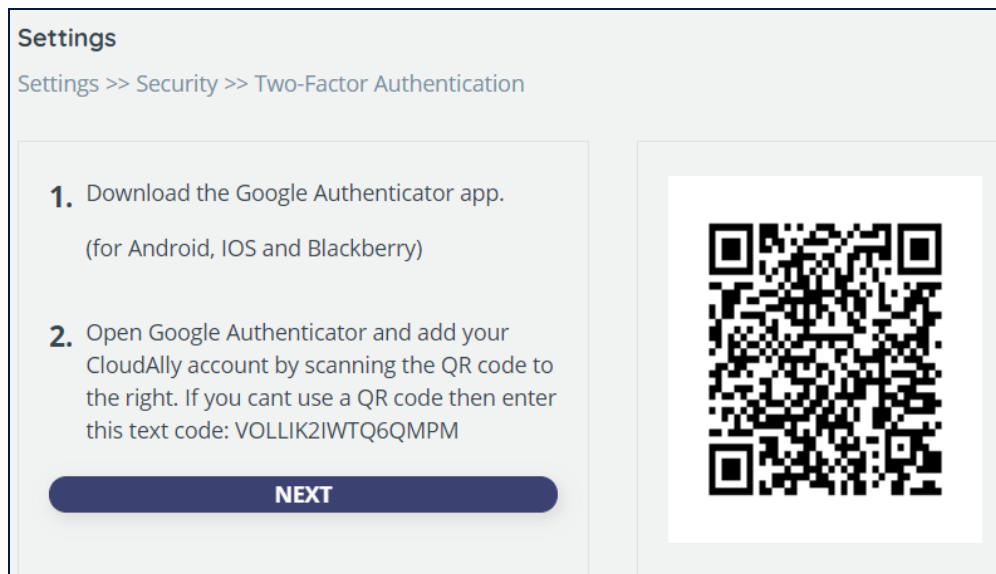
3. Enter the current password in the *Current Password* field.
4. Enter the new password in the *New Password* field.
5. Re-enter the new password in the *Confirm New Password* field.
6. Click **SAVE**. You can now use this password to access your account.

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.



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

From now on, every time you sign in to your Account, you are asked to enter a 6-digit 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).

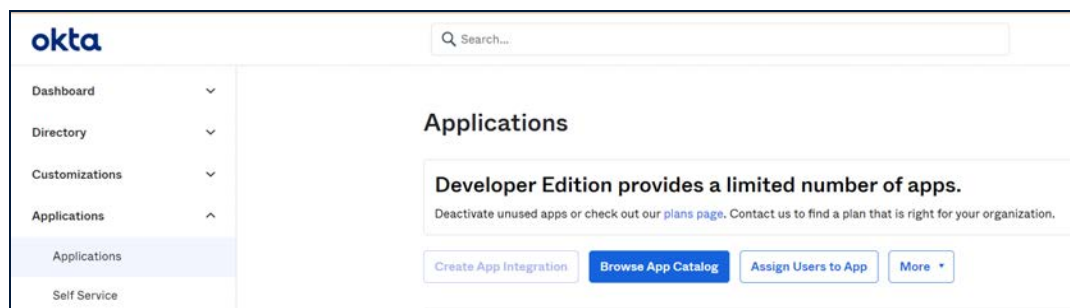
CloudAlly supports Okta as its SAML provider.

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

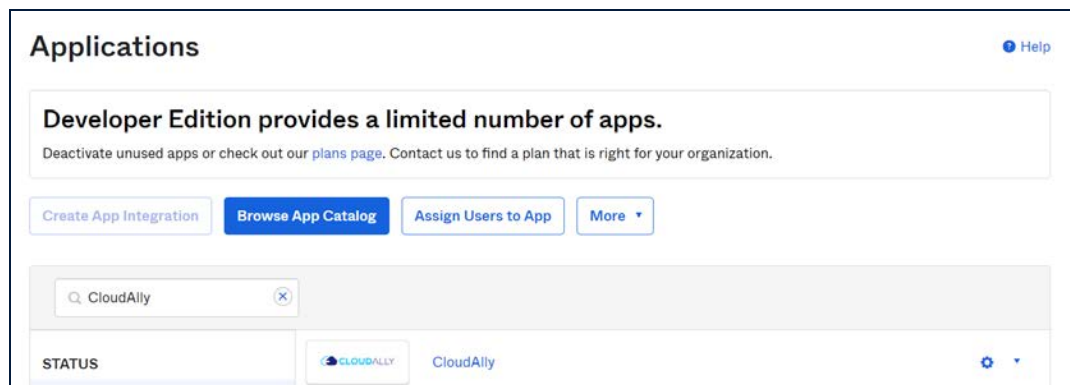
- Setting up CloudAlly in the Okta Application
- Setting up Okta in the CloudAlly application

6.4.3.1 Setting up CloudAlly in the Okta Application

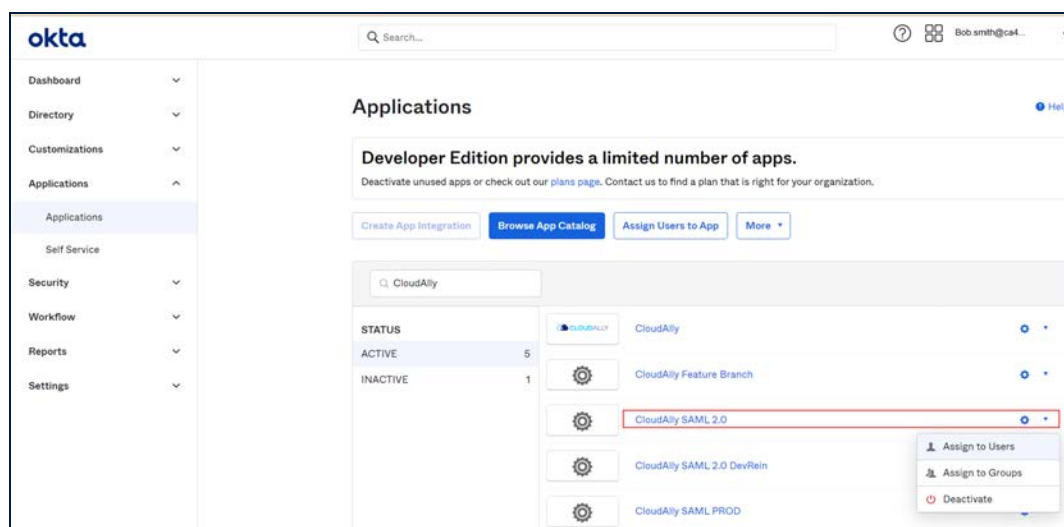
- In the Okta application, click **Applications > Applications > Browse App Catalog**.



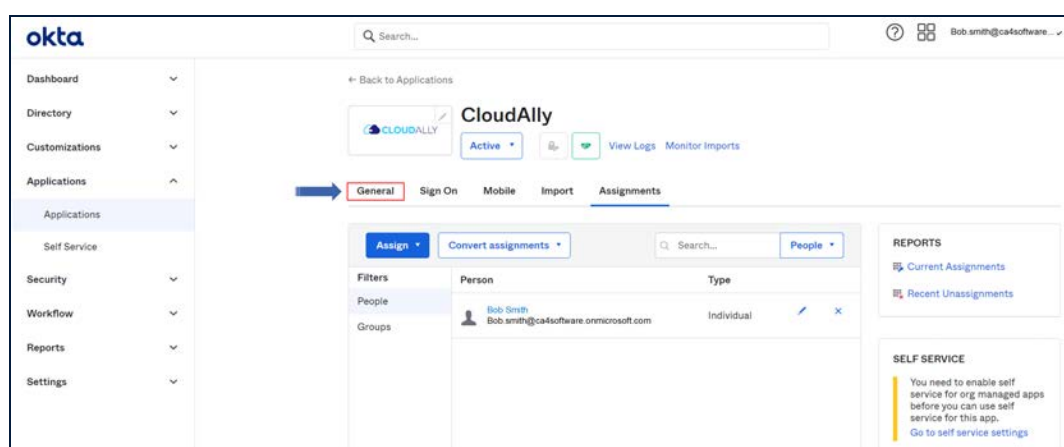
- In the search bar, enter CloudAlly.



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



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



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

App Embed Link

Edit

Embed Link

You can use the URL below to sign into CloudAlly SAML 2.0 from a portal or other location outside of Okta.

https://Bob.smith@okta.com/home/123456789_cloudallysaml20_1/Ooa2refpeId3092Tr09va

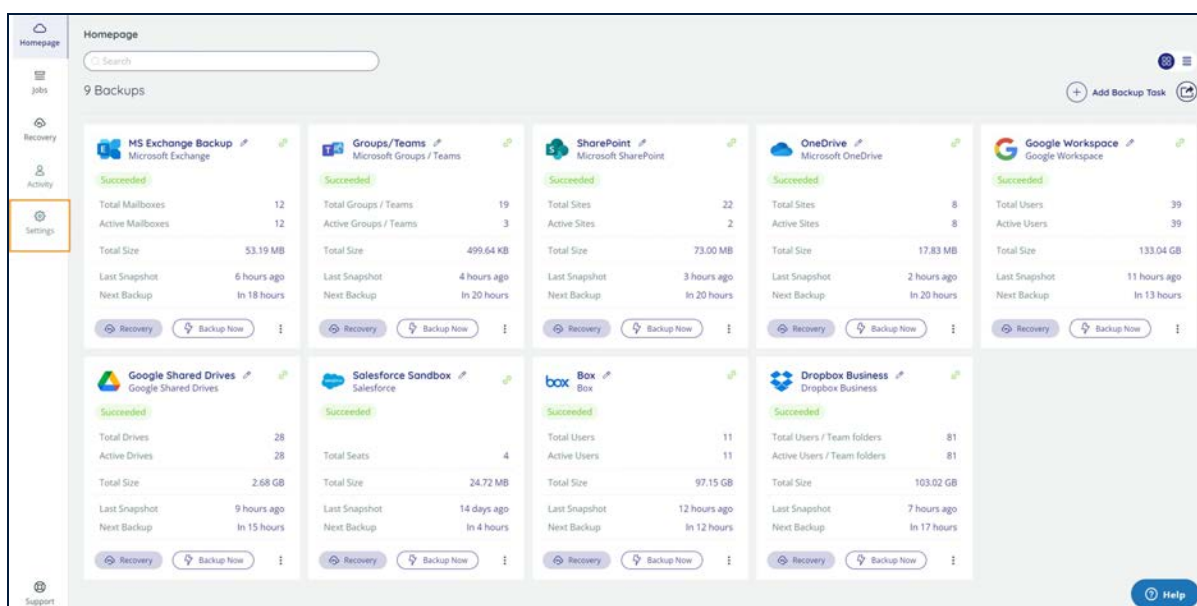
Application Access Error Page

If someone who is not assigned to the application attempts to use an embed link, they will be redirected to a default error page or one that can be customized. An application level setting will override default URL settings.

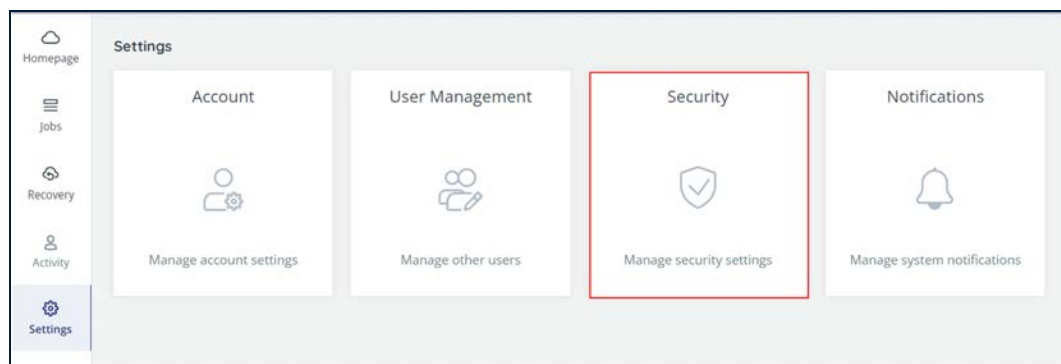
☒ Use the error page setting on the [global settings](#) page
 ☐ Use a custom error page for this application

6.4.3.2 Setting Up Okta in the CloudAlly Application

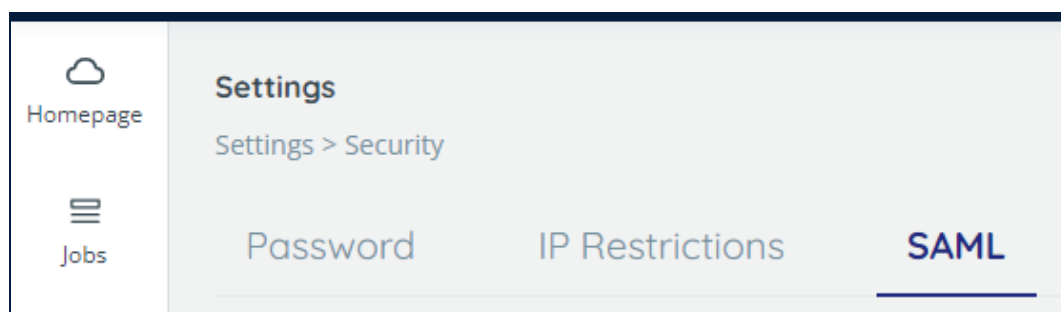
1. From the Homepage, click **Settings** in the Navigation panel.



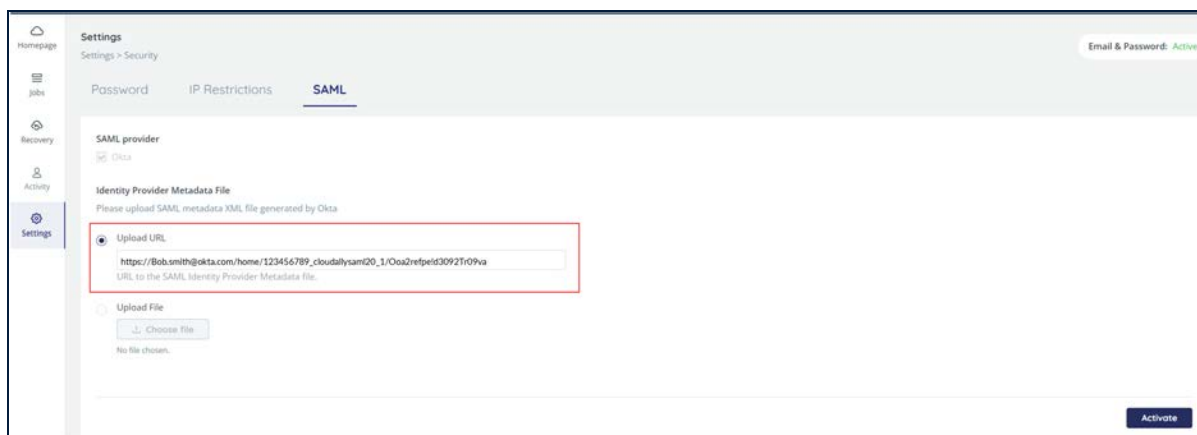
2. On the Settings page, click **Security**.



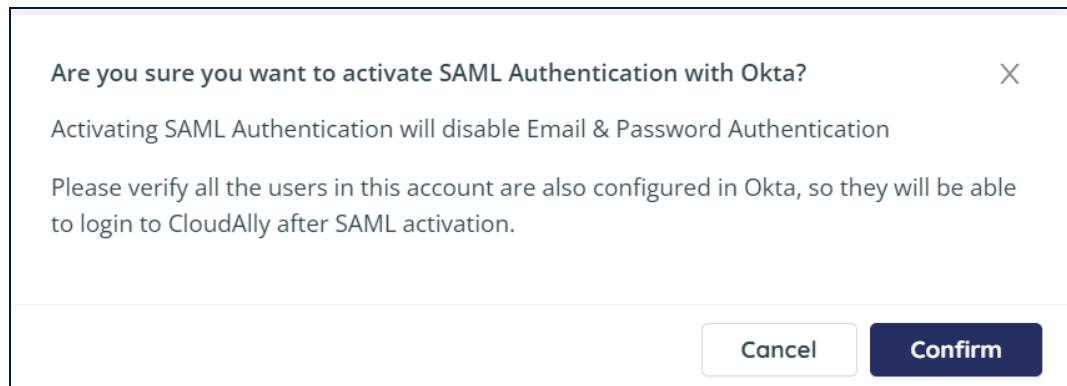
3. Click the **SAML** tab.



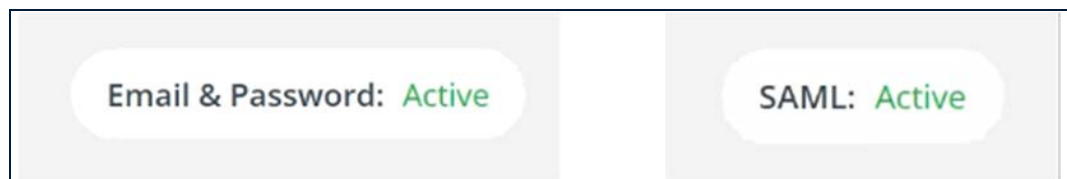
4. Paste the URL that you copied from the Okta site.



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



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



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.

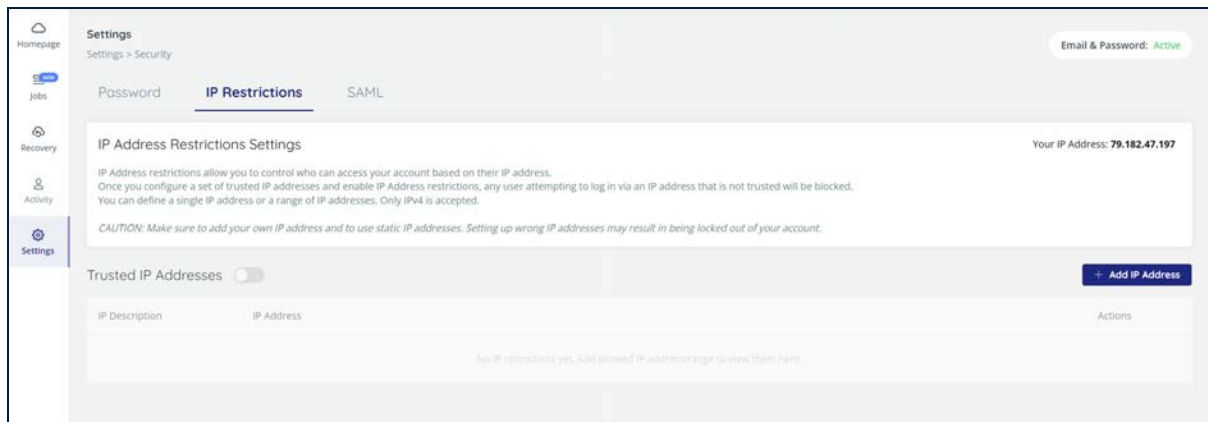
Setting Up IP Restrictions

To enable IP restrictions in your 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**.



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

The screenshot shows a dialog box titled 'Add New IP Address'. It displays 'Your IP Address: 130.248.112.29'. There is a text field for 'Enter IP Address description (optional)' with the example 'e.g. Office'. Below this, it says 'You can add one or more IP addresses, or a range of IP addresses:'. There are two radio button options: 'Trusted IP Address(es)' (which is selected) and 'Trusted IP Address Range'. The 'Trusted IP Address(es)' option has a text field for 'Separate multiple IP addresses with ","' and an example '192.168.10.5'. The 'Trusted IP Address Range' option has 'From' and 'To' text fields with an example '192.168.10.0 - 192.168.10.255'. At the bottom right are 'Cancel' and 'Save' buttons.

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

Add New IP Address
Your IP Address: 79.181.255.0

Enter IP Address description (optional)

You can add one or more IP addresses, or a range of IP addresses:

☐ Trusted IP Address(es)
 Separate multiple IP addresses with ",".

 Example 192.168.10.5

☒ Trusted IP Address Range
 From To
 Example 192.168.10.0 - 192.168.10.255

Cancel
Save

- 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.

Homepage
Recovery
Billing
Security
Settings
Support

Security Settings

Settings > Security

[Password](#)
[SAML](#)
[IP Restrictions](#)

Email & Password: Active

IP Address Restrictions Settings

Your IP Address: 130.248.112.29

IP Address Restrictions allow you to control who can access your account based on their IP address. Once you have configured 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 a single IP address or a range of IP addresses. Only IPv4 is accepted.

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 ☒

IP Description
IP Address
Actions

Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	
--------	--	--

Add IP Address

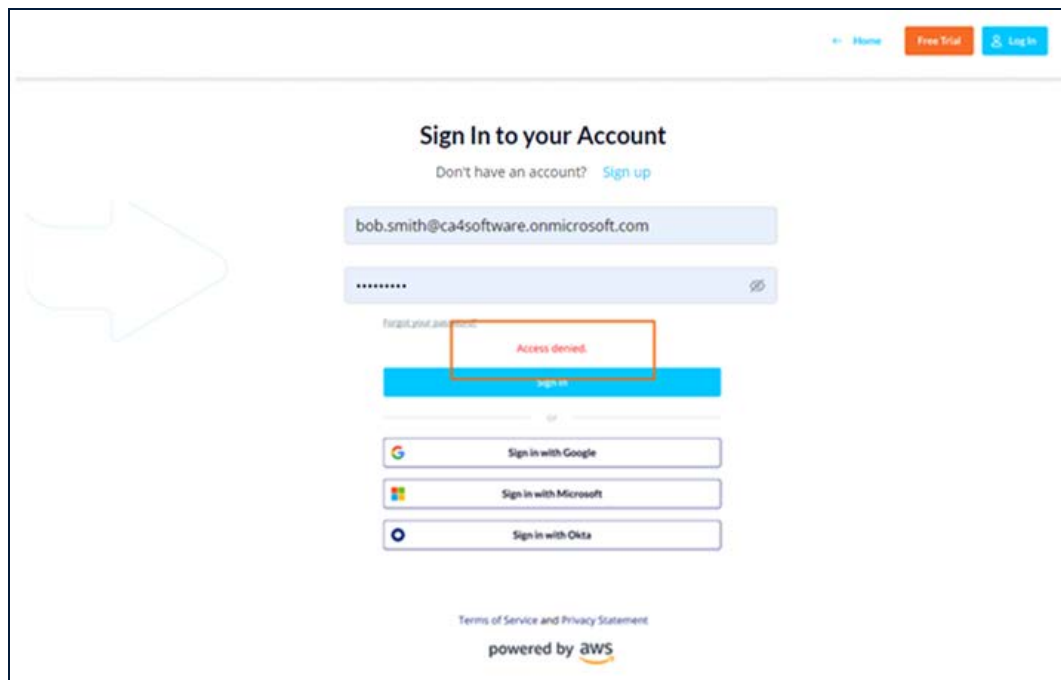
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

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

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

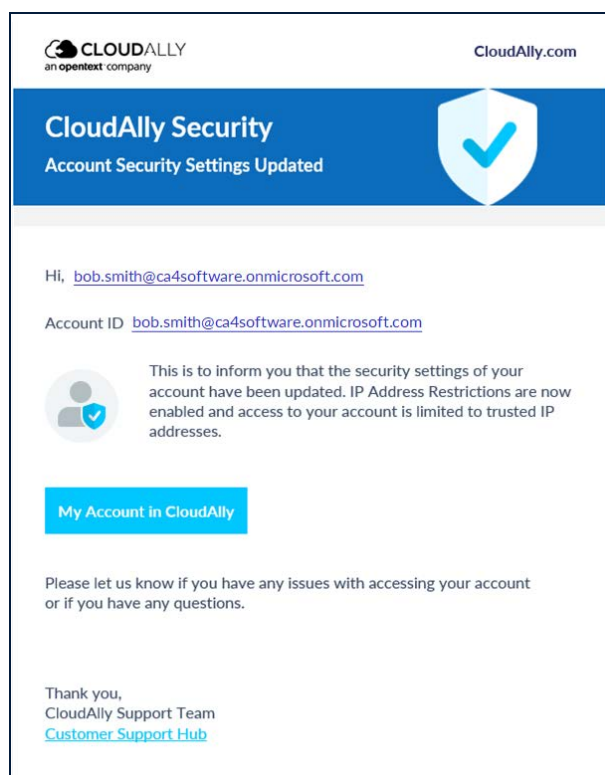
Blocking Access

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



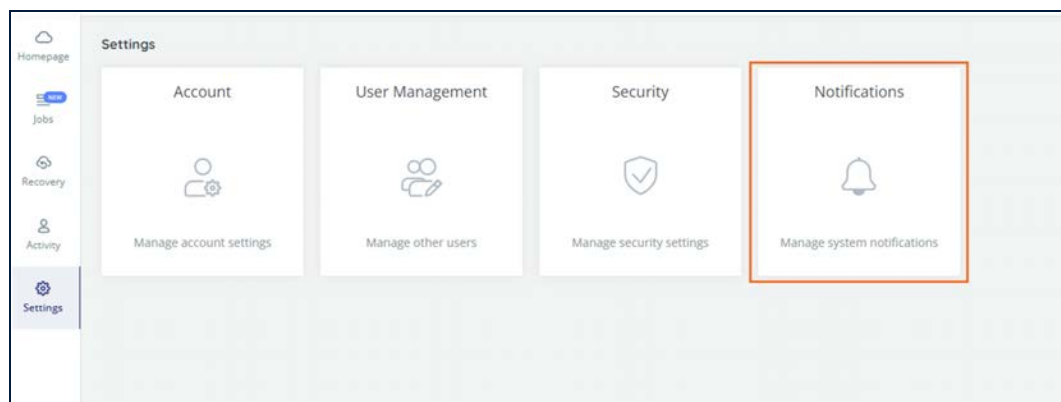
6.4.5 Email Notifications

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**.



The following screen will appear:

Settings
Settings > Notifications

Summary Report ☒

Report Format:
☒ Backup tasks overview [Preview](#)
☐ Backup failure details [Preview](#)

Report Frequency:
Once A Day

Provide as:
☐ CSV Attachment
☒ Download Link

☐ Send the report only in case of backup failure

[SAVE](#)

Send Notifications To: [+ Add new recipient](#)

Email	Display Name	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts	Action
Bob.smith@CA44software.onmicrosoft.com	Bob Smith	✓	✓	✓	✓	✓	✎ ⌵

Page 1 of 1
Showing 1-1 of 1

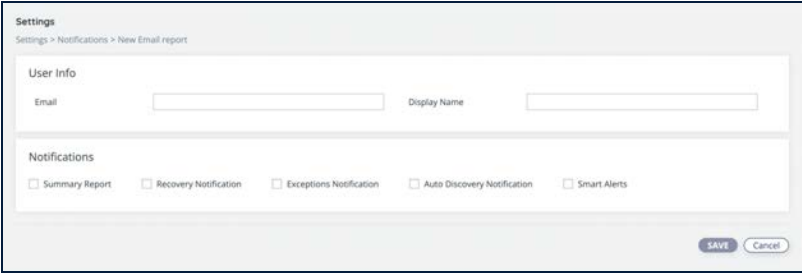
The top of the screen enables you to configure the following options:

- 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.



The screenshot shows a web interface titled 'Settings' with a breadcrumb trail 'Settings > Notifications > New Email report'. Below the title is a 'User Info' section with two input fields: 'Email' and 'Display Name'. Underneath is a 'Notifications' section containing five checkboxes: 'Summary Report', 'Recovery Notification', 'Exceptions Notification', 'Auto Discovery Notification', and 'Smart Alerts'. At the bottom right of the form are two buttons: 'Save' and 'Cancel'.

7 Managing Subscriptions and Payments

7.1 Subscribing to CloudAlly

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

To subscribe to a plan:

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

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

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

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

You are redirected to the *Payment Details* page. Fill in the billing and credit card details to finish the subscription process. Refer to [Payment Details](#) 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**.

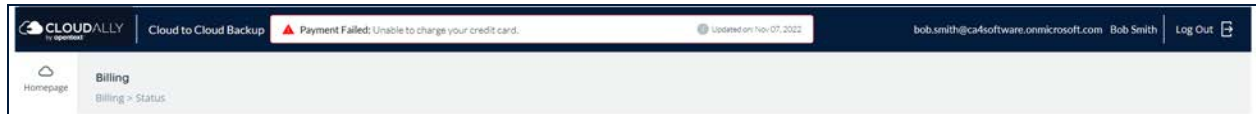
The initial payment will be charged at the end of your 2-week trial period.

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

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

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

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



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 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 Support will send you an email, asking that you confirm your annual subscription request.

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

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

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

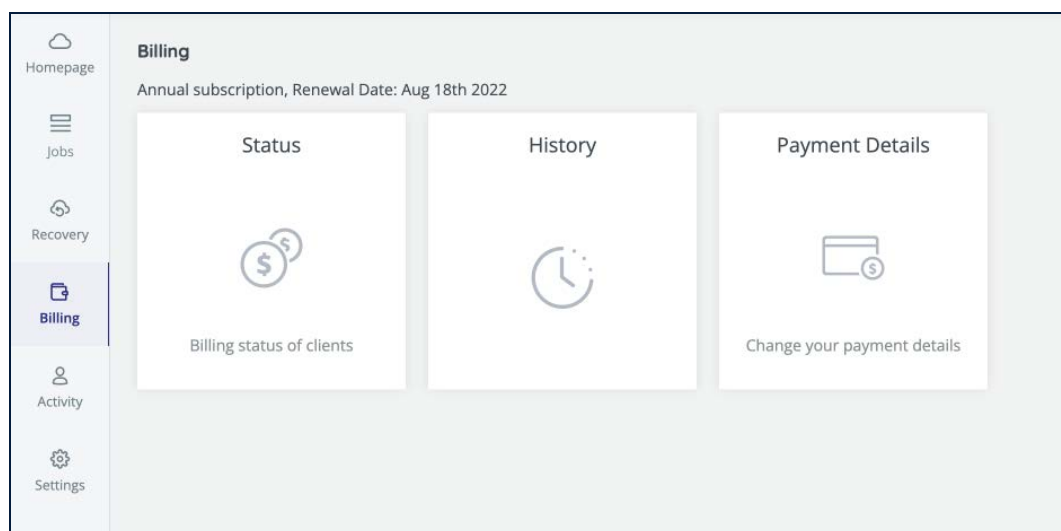


Should you fail to make your annual payment, you will be reminded with a message like this:



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



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:

The screenshot shows the 'Billing > Payment' page. It has two main sections: 'Credit Card Details' and 'Billing Details'. The 'Credit Card Details' section has a 'Card Number' dropdown menu showing 'CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)' and buttons for 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'. The 'Billing Details' section contains various input fields: 'Currency' (EUR), 'First Name' (Bob), 'Billing Email' (bob.smith@ca4software.onmicrosoft.com), 'Company Name' (12345), 'Address Line 1' (123 Main Street), 'Country' (United Kingdom), 'City' (Anytown), 'Phone number' (2011234567), 'Payment Day' (5), 'Title' (Mr), 'Last Name' (Smith), 'Company Tax Id' (12345), 'Address Line 3', 'State', 'Zip Code/Postal Code' (12345), and 'Email Invoice/Receipt' (Link selected). An 'UPDATE BILLING DETAILS' button is at the bottom right.

7.2.1.1 Add New Card

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

The screenshot shows the 'Billing >> Payment details' page. It displays 'Monthly subscription, next payment: Dec 13th 2020'. There are two sections: 'Credit Card Details' and 'Add new card details'. The 'Credit Card Details' section has a 'Card Number' dropdown menu showing 'undefined: XXXX-XXXX-XXXX-444...' and buttons for 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'. The 'Add new card details' section has a 'Card Holder's Name' input field, a 'Card Number' input field with a blue card icon, and a 'Card Number' input field with 'MM / YY' and 'CVV' placeholders. An 'ADD NEW CARD' button is at the bottom right.

To create a new payment method:

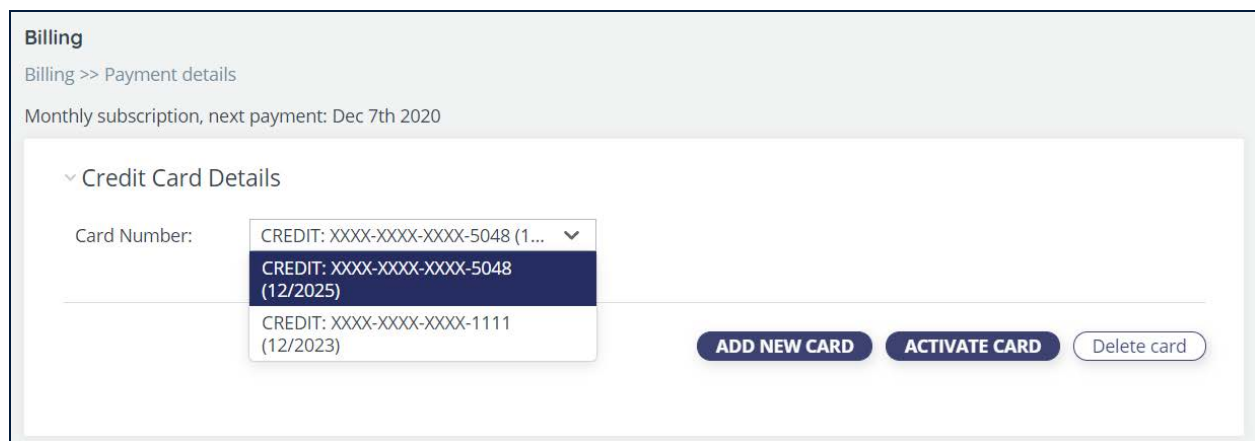
1. Click **ADD NEW CARD**.
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

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 screenshot shows the 'Billing >> Payment details' page. At the top, it says 'Monthly subscription, next payment: Dec 7th 2020'. Below this is a section titled 'Credit Card Details'. On the left, there is a label 'Card Number:'. To its right is a dropdown menu. The dropdown menu is open, showing three options: 'CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)' (highlighted in blue), 'CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)', and 'CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)'. To the right of the dropdown menu are three buttons: 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'.

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

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

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

▼ Billing Details

* Currency:	<input type="text" value="USD"/>	Title:	<input type="text"/>
* First Name:	<input type="text"/>	* Last Name:	<input type="text"/>
* Billing Email:	<input type="text"/>	Company Tax Id:	<input type="text"/>
* Company Name:	<input type="text"/>	* Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>
* Country:	<input type="text"/>	State:	<input type="text"/>
* City:	<input type="text"/>	* Zip Code/Postal Code:	<input type="text"/>
* Phone number:	<input type="text"/>	Email Invoice/Receipt:	<input type="radio"/> Link <input checked="" type="radio"/> Attachment

UPDATE BILLING DETAILS

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

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

Note: You can change the billing currency by contacting Support.

7.2.2 Annual Subscriptions

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

7.3 Billing Status

Annual Subscription

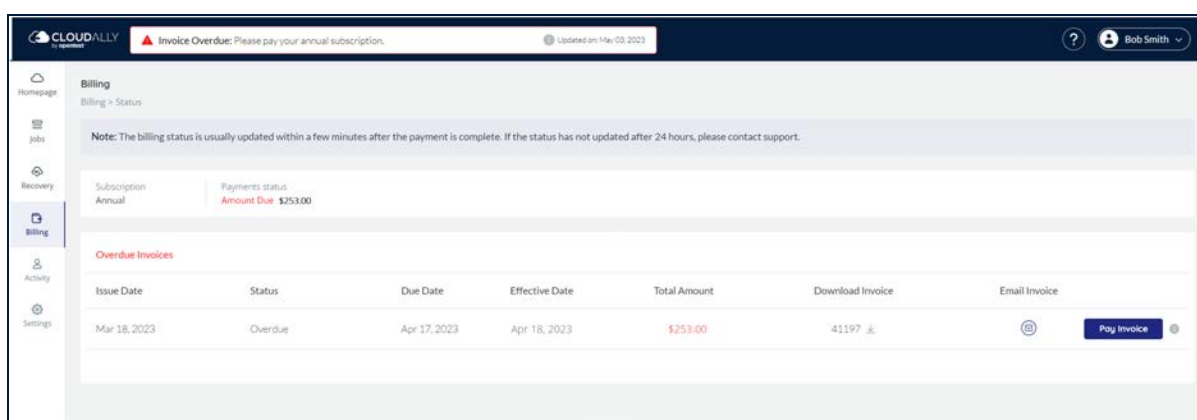
When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.

Subscription	Payments status	Next renewal date	Forecast for next payment
Annual	Paid	Sep 12, 2023	\$226.80


Service	Total Quantity	Billable Quantity	Unit Price	Total Amount
MS Exchange (365)	6 mailboxes	6 mailboxes	\$37.80	\$226.80

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

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



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



CloudAlly

**bob.smith@ca4software.com, 1
year backup starting September
28, 2022, HR MS 365 Bundle Plan -
Comprehensive Microsoft 365
Backup Billed Per User**


Buyer bob.smith@ca4software.com

Due date Apr 17, 2023

Total **\$1,890.00**

morning by Green Invoice is not part of the interaction between the business and its customers, and is not liable for the goods & services offered by the business, and/or the business' use of the customer's credit cards.

Choose payment method

Pay With  **PayPal**

On the Paypal page, you can also pay by credit, without the need for a user account

Monthly

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

CloudAlly
an opentext company

Cloud to Cloud Backup

Payment Failed: Unable to charge your credit card.

Updated on: 10/07/2022

bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out

Home page
Jobs
Recovery
Billing
Activity
Settings

Billing

Billing > Status

Note: The billing status is updated once a day. If you made any recent payments it will be reflected in the next 24 hours.

Subscription
Monthly

Payments status
Amount Due \$51.52

Update credit card details





Unpaid Bills

Issue Date	Due Date	Effective Date	Total Amount
Jun 20, 2022	Jun 20, 2022	Jul 1, 2022	\$12.88
May 20, 2022	May 20, 2022	Jun 1, 2022	\$12.88
Apr 20, 2022	Apr 20, 2022	Mar 1, 2022	\$12.88
Mar 20, 2022	Mar 20, 2022	Apr 1, 2022	\$12.88

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

7.4 History

This page displays the history of payments.

Billing			
Billing >> History			
Monthly subscription, next payment: Dec 13th 2020			
Reference Number	Issue Date	Due Date	Amount
68277 	November 13, 2020	November 13, 2020	\$143.45
67599 	October 13, 2020	October 13, 2020	\$44.65
67134 	September 13, 2020	September 13, 2020	\$48.40
66837 	August 13, 2020	August 15, 2020	\$44.65
Page 1 of 1			Showing 1-4 of 4

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

An example of a receipt is displayed below.



To: pizza-perfecto.com – PPV001

CloudAlly Ltd.

Pizza Perfecto Ltd
18 Mozarella Lane
United Kingdom ID 307 123 08

Tax ID: 514596667
12 Harimon st., Gan Hayyim 4491000,
Israel
www.cloudally.com
accounting@cloudally.com

Invoice / Receipt 51646

26 Apr 2021

Certified Copy

Invoice / Receipt for admin@pizza-perfecto.com, 1 year backup starting April 22, 2021, GBP

QTY	Description	Price	Total
70	Dropbox 696.56 GB	16.25 GBP	1,137.50 GBP
Subtotal			1,137.50 GBP
VAT 0%			0.00 GBP
Total payable			1,137.50 GBP

Payments Details

Type	Description	Date	Amount
PayPal	Account 12345678 / Transaction # 987654321	26 April 2021	1,137.50 GBP

Total **1,137,50 GBP**



Invoice / Receipt for Proforma Invoice 11392
Paid with PayPal
Merchant Account: KQMTW2PHR5CUG

Signature: CloudAlly Ltd
c.n 514596667

Secured Electronic Signature

Digital Document Signed by **Green Invoice #**

Created 26/04/2021 16:29 | Invoice / Receipt 51646 | page 1 of 1

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 next to the user's name.
For a new user, the notification options will appear when you define the new user's details.
3. Click **View billing notification messages** on or off.

The screenshot shows the 'Settings' page for 'User Management > New user'. The left sidebar contains navigation links: Homepage, Jobs, Recovery, Billing, Activity, and Settings (highlighted). The main content area is divided into two columns. The top section contains fields for 'Email' (bob.smith@ca4software.onmicrosoft.com), 'Type' (Email), 'Password' (masked), and 'Role' (Custom). Below this, the 'Operations' section has a 'General' subsection with several checkboxes: 'View Account setting page', 'View billing page and manage payment details', 'View billing notification messages' (checked), 'View support page', 'View account activity', 'Show all your support tickets', 'Manage Notifications', and 'View backups page'. There is also a 'Backup Tasks' subsection with 'Activate new backup tasks', 'Modify backup tasks', 'Delete backup tasks', and 'Review backup tasks'. The right column is titled 'Services' and includes an 'All' checkbox and a list of services: Microsoft Exchange, Microsoft Groups / Teams, Microsoft SharePoint, Microsoft OneDrive, Google Account, Salesforce, Dropbox Business, Box, Google Workspace, Google Shared Drives, and IMAP.

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 <https://support.cloudally.com> to find answers to the most common user questions.

8.3 Support

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

8.4 Privacy

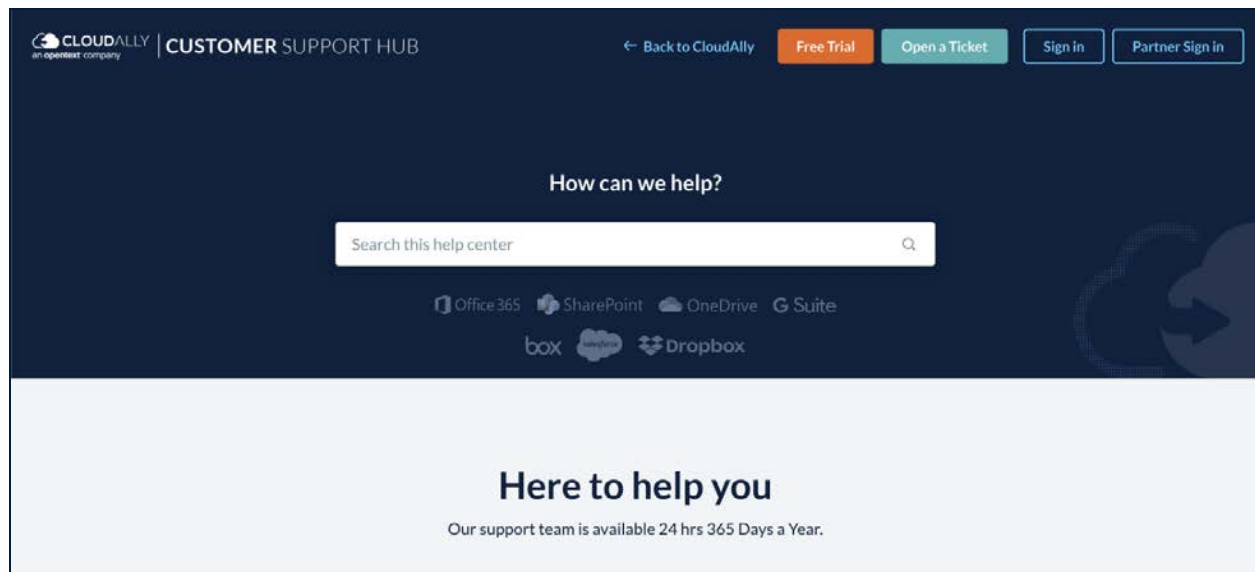
CloudAlly takes privacy seriously. Read our Privacy Policy at <https://www.cloudally.com/privacy-policy>

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 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: Info@cloudally.com


Customer Support: Support@cloudally.com

Sales: Sales@cloudally.com

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

Here to help you


Our support team is available 24 hrs 365 Days a Year.



Ticket

Open a new ticket or view your existing tickets


[Open a Ticket](#)



Call

Our agents are available to assist by telephone.


[Call Us](#)



Chat

Click to chat with our customer support agents.

[Chat With Us](#)




Email

Email us with your customer support inquiry.


[Email Us](#)

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.


Knowledge Base




Getting Started




My Account




Backup Solutions



User Guides



Videos



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