

User Guide

Dropbox

Backup & Recovery





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1 Preface

1.1 About this Guide

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

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

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

1.2 Audience

This guide is intended for individuals who administer CloudAlly Backup for Dropbox.

1.3 What's in this Guide

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

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



2 Creating and Accessing Your CloudAlly Account

2.1 Prerequisites

To administer the CloudAlly Backup for Dropbox environment, the following is required:

CloudAlly Backup for Dropbox subscription

2.2 Sign Up/Sign In from the CloudAlly Home Page

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

an opentext company		Free Trial
	Sign In to your Account	
	Email	
	Password Fornet.vour.eassword?	
	Sign In	
	or	
	G Sign In with Google	
	Sign In with Microsoft Sign In with Okta	
	зідпінічні окса	
	Terms of Service and Privacy Statement powered by aWS	

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



Comprehensive. Proven. Secure. Enterprise-grade automated backup and recovery.	Sign up for a 14 Day Free Trial
Protect your Cloud Data for FREE with CloudAlly	First Name Last Name
📀 14 Day Free Trial	Email
S Minutes Setup	
📀 No Credit Card Required	Password Ø Confirm Password Ø
Get proven and secure data protection with the Pioneers of SaaS backup.	EU (Ireland)
User to use to u	Sign up
÷ • • • •	or
	G Sign up with Google
	Sign up with Microsoft
	By creating an account, you agree to our <u>Terms of Use</u> and <u>Privacy Policy</u> . We'll occasionally send you account related emails.

- 4. Complete the form, and then click Sign up.
 - **Note:** CloudAlly Backup gives you the choice of 7 AWS data centers available in the dropdown menu "Location." These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, and Japan. The ability to choose from a wide range of data centers helps our customers comply with local data sovereignty laws that regulate the physical location and movement of data. In addition, we also offer a "Bring Your Own Storage" (BYOS) option on request. This allows you to backup sensitive data in your own AWS S3 buckets, S3 compatible storage service, Azure, or Google Cloud Platform. Please contact support@cloudally.com for more information.
- 5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
- 6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your CloudAlly Account.

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



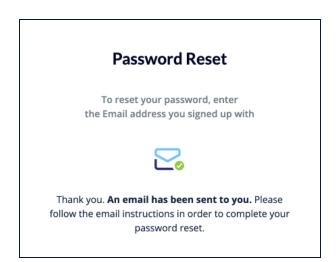
2.3 Resetting Your Password

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

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

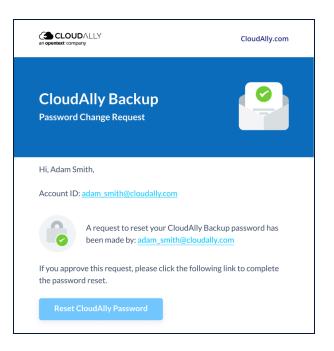
Passwo	rd Reset
P 1	oassword, enter you signed up with
Email	
Re	set
ign in	Sign up

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





The email will look as follows:



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

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

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

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



3 Backing Up Your Dropbox Data

Dropbox lacks the daily backup and archiving process necessary for you to restore data after it has been manually or automatically removed from the recycle bin. CloudAlly automated daily Dropbox 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 Dropbox service backs up data from files and folders.

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

3.1 Supported Versions

CloudAlly supports backup and recovery of the following Dropbox versions:

- Business Professional
- Business Standard
- Business Advanced

Note:

- * Dropbox personal versions are not supported.
- * CloudAlly supports upgrading from Dropbox Standard and
- Advanced plans to Dropbox Professional.
- The backup history will be preserved and available for recovery.

3.2 Creating a New Backup Task

To create a new CloudAlly backup task:

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



		Bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
Homepage Jobs	Homepage Q Search 7 Backups	88 🖨
Recovery Activity	e ² € Full MS Exchange Backup ℓ Microsoft Exchange Succeeded	Total Active Total Size Last Snapshot Next Backup Steadup Nov 12 12 14.81 MB one day ago In 13 hours C Backup Nov
(3) Settings	e ^P TS Hill Teams Backup 𝔎 Microsoft Groups / Teams Partially Succeeded	Total Active Total Size Last Snapshot Next Backup Secure 63 63 6.48 MB 34 days ago In 12 hours Image: Constraint of the secure
	e ² Groups And Teams Back_ ℓ Microsoft Groups / Teams Succeeded	Total Active Total Size Last Snapshot Next Backup Secure 8 2 70.95 KB 38 days ago In 10 hours Secure In 10 hours
	eP Sharepoint Backup // Microsoft SharePoint Partially Succeeded	Total Active Total Size Last Snapshot Next Backup Second 88 62 78.57 MB 2 days ago in 3 days C Beckup Now
	e ² Sharepoint Backup ℓ Microsoft SharePoint Succeeded	Total Active Total Size Last Snapshot Next Backup Securey 11 11 114.99 MB 48 days ago In 11 hours Securey
(2) Support	One Drive Ø Microsoft OneDrive Succeeded	Total Active Total Size Last Snapchot Next Backup 64 64 12.83 GB 2 days ago In 11 hours

The Activate A New Backup page is displayed:

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

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



Enter your admin details	
* Backup Name	
Enter your backup name	
You will be redirected to Dropbox for authentication.	
Cancel	Authentication

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

٩			bob.smit	h@ca4software.onmicrosoft.com	Bob Smith	Log Out 📄
O Homepage	Full Dropbox Backup 🖉 Homepage > Full Dropbox Backup					
Jobs						٥
Recovery	Backup Settings					
Activity	The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual l	billing amount				
ø	☑ Index all data for Search	Backup Datacenter	0	Retention Period		0
Settings	Automatically activate new users / team folders 🕘			Backup Hour (UTC)		
	Retain auto-archived backups for days before deleting 1	Backup Frequency Daily		3:00		v
					Cancel	Save

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



3.3 Configuring Backup Settings

To access the configuration screen, click the settings • icon on the top right side of the screen.

٤			bob.smith@ca4software.onmicrosoft.com Bob	Smith Log Out 📑
 Homepage	Full Dropbox Backup Image > Full Dropbox Backup			
Jobs				٥
Recovery	Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly on	r annual billing amount		
Activity	☑ Index all data for Search	Backup Datacenter	Retention Period	θ
Settings	Automatically activate new users / team folders 💿	6 Europe (Ireland)	✓ Unlimited	
	Retain auto-archived backups for days before deleting	Backup Frequency	Backup Hour (UTC)	
	Recain auto-archived backups for adjs before detecting T	7 Daily	> 3:00	×
			Canc	Save

This set of options on this screen enables you to select the backup settings for the User / Team Folder.

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



- **Note:** The **Backup Data Center** and **Retention Period** fields are "display only," and their values can't be changed here.
- 6. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.

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

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

7. Backup Frequency and Backup Hour

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

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



3.4 Activating Your Backups

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

1. Scroll down to the bottom of the screen where all of your User / Team Folders are listed.

CLOU an openitext con	JDALLY Cloud to Cloud Backup			bob	.smith@ca4software.o	nmicrosoft.com Bol	b Smith	Log Out 🗗
O Homepage	Dropbox Backup 🖋 Homepage > Dropbox Backup							
Jobs								0
Recovery	12 Total Users / Team folders Active Paused Archived							٢
() Settings	Q Search Users	= Filter by tag			Statu	s v Tags		Action ~
	User / Team folder	\$ Email	Tags	Status 🔅	Backup Size 👙	Last Backup 💠	Back	qu
	Bob Smith	Bob.Smith@ca4software.onmicrosoft.com		 Success 	0 Bytes	3 hours ago	ς.	₽ V
	Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com		 Success 	749 Bytes	3 hours ago	ü	₽ V
	Sarah Johnson	Sarah.Johnson@ca4software.onmicrosoft.com		 Success 	0 Bytes	3 hours ago	ij.	₽ V
	Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.com		⊘ Success	0 Bytes	3 hours ago	Ξī	₽ V
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com		 Success 	9.32 MB	3 hours ago	ς.	<i>₽</i> ∨
	Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com		⊘ Success	122.92 KB	3 hours ago	¢î,	\$ V
(B) Support								(?) Help

- 2. Select one or more User / Team Folder(s).
- 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.



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omepage		x Backup 🖉 ge > Dropbox Backup								
⊒ Jobs		Connected Ø								٩
Activity		otal Users / Team folders Paused Archived								٢
Operation of the second sec		earch Users		\Xi Filter by tag			Status	Tags ~	_	Action ^
	×	User / Team folder	÷	Email	Tags	Status \$	Backup Size 🔅	Last Backup 💠	ü	Activate Pause Backup Now
	~	Bob Smith		Bob.Smith@ca4software.onmicrosoft.com		 Success 	0 Bytes	3 hours ago		Delete
	~	Alex Douglas		Alex.Douglas@ca4software.onmicrosoft.com		⊘ Success	749 Bytes	3 hours ago	Ċî,	<i>₽</i> ∨
	~	Sarah Johnson		Sarah.Johnson@ca4software.onmicrosoft.com		⊘ Success	0 Bytes	3 hours ago	Ξī	<i>₽</i> ∨
	~	Scarlett Davis		Scarlett.Davis@ca4software.onmicrosoft.com		⊘ Success	0 Bytes	3 hours ago	Ξī.	
	~	Charles Wilson		Charles.Wilson@ca4software.onmicrosoft.com		Success	9.32 MB	3 hours ago	ς.	₽ V
	V	Jessica Miller		Jessica.Miller@ca4software.onmicrosoft.com		 Success 	122.92 KB	3 hours ago	Ġi.	9 V

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

3.5 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.

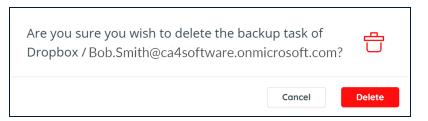
3.5.1 Removing a Backup Task

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

e	box	Box Backup @ Box Succeeded	Total 🔀 5	Active 📵 5	Total Size 10.64 GB	Last Snapshot 14 hours ago	Next Backup In 10 hours	Ree Resume Backup Back Pause Backup
Ð	¥	Full Dropbox Backup 🖉 Dropbox Succeeded	Total 🚯 5	Active 🔞	Total Size 0 MB	Last Snapshot Never	Next Backup In 14 hours	Delete Backup S Returnery Backup Now
								(?) Help

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 after your backup is deleted.

3.5.2 Removing an Individual User / Team Folder

To remove an individual User / Team Folder:

- 1. Click the backup service from which you want to remove the User / Team Folder. The backup task settings page is displayed.
- 2. Add a check next to the User / Team Folderthat you want to remove. Click **Delete** in the **Actions** menu.

٩			bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
O Homepage	Full Dropbox Backup 🖋 Homepage > Full Dropbox Backup		
⊒ Jobs			۲
Recovery Activity	5 Total Users / Team folders Active Paused Archived		6
() Settings	Q Search Users	(≡ Filter by tag	Status v Tags v Action A
	User / Team folder Bob Smith	Email Tags Bob.Smith@ca4software.onmicrosoft.com	s Status triangle Backup Size triangle Last Backup triangle Backup Now
	Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com	⊖ Success 0 Bytes 10 minutes ago
	Charles Wilson	Charles. Wilson@ca4software.onmicrosoft.com	⊘ Success 9.32 MB 10 minutes ago 🛱 ♀ ∨
	Sarah Johnson Scarlett Davis	Sarah Johnson@ca4software.onmicrosoft.com Scarlett.Davis@ca4software.onmicrosoft.com	 Success 122.92 KB 10 minutes ago □1 ↔ ✓ ✓
			C
(2) Support			() Help

3. A pop-up window is displayed with a list of accounts selected for removal. Click **Delete**. The selected User / Team Folderare removed from your account.

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



3.6 Modifying the Settings of an Existing Backup

To modify an existing backup task:

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

()		Bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
C Homepage	Homepage	
Jobs	Q Seath 7 Backups	8 😝 (+) Add Backup Task
Recovery Activity	PUII MS Exchange Backup // Microsoft Exchange Succeeded	Total Ø Active Ø Total Size Last Snapshot Next Backup 12 12 14.81 MB one day ago In 13 hours Image: Comp hour backup hou
(2) Settings	Pull Teams Backup / Microsoft Groups / Teams Partially Succeeded	Total Ø Active Ø Total Size Last Snapshot Next Backup 63 634 648 MB 34 days ago In 12 hours
	Groups And Teams Back_ Microsoft Groups / Teams Succeeded	Total Ø Active Ø Total Size Last Snapshot Next Backup Ø Recovery I 8 2 70.95 KB 38 days ago In 10 hours Image: Comp Recovery Image:
	Shorepoint Backup Microsoft SharePoint Partially Succeeded	Total Ø Active Ø Total Size Last Snapshot Next Backup Ø Recovery I 88 62 78.57 MB 2 days ago In 3 days In 3 days Image: Comparison of the state provided in the
	Shorepoint Backup Microsoft SharePoint Succeeded S	Total Ø Active Ø Total Site Last Snapshot Next Backup 11 11 114.59 MB 48 days ago In 11 hours
© Support	One Drive Microsoft DoeBrowe Succeeded	Total Active Total Active Tota

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

()				bo	b.smith@ca4software	onmicrosoft.com Bo	b Smith	Log Out
 Homepage	Full Dropbox Backup 🖋 Homepage > Full Dropbox Backup							
⊒ Jobs								♦ @
Recovery Activity	5 Total Users / Team folders Active Paused Archived) (= Filter by	tag		Statu	is V) Tags V	Ac	© tion ~
	└ V User / Team folder	Email	≑ Tags	Status \$	Backup Size 💲	Last Backup 👙	Backup	
	Bob Smith	Bob.Smith@ca4software.onmicrosoft.com		⊘ Success	0 Bytes	20 minutes ago	□ 9	~
	Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.co	m	 Success 	0 Bytes	20 minutes ago	ä 9	~
	Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.	com	 Success 	9.32 MB	20 minutes ago	□ 9	~
	Sarah Johnson	Sarah.Johnson@ca4software.onmicrosoft.c	com	 Success 	122.92 KB	20 minutes ago	ä 9	~
	Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.co	om	 Success 	0 Bytes	20 minutes ago	ä 9	~



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

4 Recovering Your Backed Up Data

4.1 Using the Recovery Menu

The Recovery Menu provides you with options at a fine granularity for selecting which User / Team Folder to restore or export.

To recover your backed up data:

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

R	Restore & Download					
		ackup Accounts				
	Search					
	т <mark>К</mark>	Microsoft Groups / Teams 1 group / team test		>		
		Microsoft OneDrive 18 sites Test		>		
	86	Microsoft Exchange 30 accounts Test		>		
	box	Box 8 accounts Test		>		
	G	Google Workspace 3 google accounts cloudrein.com		>		
	•	Microsoft SharePoint 13 sites Test		>		

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



				bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out					
	Restore or download Dropbo	x active users / team	folders						
Jobs	Listed below are the users / team folders within your Dropbox organization backed up by CloudAlly, ready for restore and download.								
(5) Recovery	USER / TEAM FOLDER	FIRST BACKUP	LAST BACKUP	ACTION					
8	Search	🗙 All 🗸							
Activity	Bob.Smith@ca4software.onmicrosoft.com	17 hours ago	3 hours ago	>					
٥	Alex.Douglas@ca4software.onmicrosoft.com	17 hours ago	3 hours ago	>					
Settings	Charles.Wilson@ca4software.onmicrosoft.com	17 hours ago	3 hours ago	>					
	Sarah.Johnson@ca4software.onmicrosoft.com	17 hours ago	3 hours ago	>					
	Scarlett. Davis @ca4software.onmicrosoft.com	17 hours ago	3 hours ago	>					
	View 1 - 5 of 5	« < Pa	ge 1 of 1 > >>						

This page displays all your Dropbox domains backed up with the details such as User / Team Folder 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 User / Team Folder name.
- Click the arrow icon at the end of the line of the User / Team Folder which you want to restore or export (download).

The Restore or download Dropbox page is displayed.

(\bullet)		bob.smith@ca4software.onmicrosoft.com Bob Smith	Log Out
Homepage B Jobs	Restore or download Dropbox Backup task: Full Dropbox Backup Retor & Download -Full Dropbox Backup -Texting team tolder 1		
G Recovery	Please select your preferred choice for restore (●) Via Snapshot → Data changed from		
Activity	From initial backup To Today V		
	Via Item Search		
	Continue		



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

4.1.1 Restore or Download Via Snapshot

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

٩		bob.smith	h@ca4software.onmicrosoft.com Bob Smith Log Out 📑
Homepage	Restore or download from Full Restore & Download >Full Dropbox Buckup >Testing team folder 1 - snapshots	Dropbox Backup archive	
Jobs	From the archive list below select the relevant in zip extract of the data.	tems, then click on "restore" to perform a non-destructive restore directly to th	e online service, or "download" to create a
	DATE	SERVICE	ACTION
8 Activity	 Sep 21 2022 06:05 AM Sep 20 2022 04:05 PM 	Dropbox Dropbox	Q Q
Settings	View 1 - 2 of 2	< < Page 1 of 1 > >>	
	Restore Download		

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

4.1.1.1 Restore

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

 Do you want to restore to another folder or account? If so, provide the new location information.



- Do you want to perform a non-destructive backup, where the restored files are added to a new folder with a blue label indicating that they have been restored?
- Or do you want to perform an in-place restore, where the restored files will be in the same folder as the original files, and any existing information will be duplicated - it will not be over-written.
 - **Note:** Dropbox limits the API calls used in our restore process to 1,000,000 per month for many of their business plans. Once the limit is reached, no other items can be restored / uploaded to Dropbox until the following month. You can still export and download backup data for recovery purposes, and then upload to Dropbox with the native application. Please contact DropBox directly if you have any questions about your API limits.

Please confirm the restore request ×								
You are about to restore items from the archive of Testing team folder 1								
Restore to Testing team folder 1								
*You can restore the data to a different account.								
Please select your restore method:								
Non-destructive: Data will be restored to a new folder. O In-Place: Restore will be performed to the original folder. Existing data will be duplicated.								
A confirmation Email will be sent to you upon completion.								
Dropbox limits the API calls used in our restore process to 1,000,000 per month for many of their business plans. Once the limit is reached, no other items can be restored / uploaded to Dropbox until the following month. You can still export and download backup data for recovery purposes, and then upload to Dropbox with the native application. Please contact DropBox directly if you have any questions about your API limits.								
Cancel OK								



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

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

4.1.1.2 Export/Download

- 1. If you click **Download**, the following confirmation window appears.
- 2. Click the drop-down list and select one of the following storage locations:

Please confirm the export request			
You are about to export items from the archive of Testing team folder 1			
Export in .zip format:			
for download 🗸	ן		
for download to your Amazon S3 to your Azure Blob to your Box.com			
to your Dropbox			
to your AWS S3 compatible			
to your GCP storage			

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



¥	Full Dropbox Backup Dropbox Testing team folder 1		Export			Succeeded
Started at Sep 21 202	t: 12 at 10:44 AM	Backup Date: Sep 21 2022 at 06:05 AM	Initiator: bob.smith@ca4software.onmicrosoft	Destination: Direct Download	Total Items: 0	Size -
Cancel					Download Results	View Log

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

٩			bob.smith@ca4software.onmicrosoft.com	Bob Smit	Log Out 📑
O Homepage	Jobs / Download Filets)				
]obs	Full Dropbas Backup Bols Smithige-Hortware annicrosoft.com				
Recovery	File Name	÷	Size \$,	ctions
Activity	Bob Smith_Dropbox, (12345.zip		7.78 MB		0
Settings					
(D) Support					() Help
🕍 Bob.Smit	L, Dropbar, 1245 ap				Show all

4.1.2 Restore or Download Via Item Search

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



٩		bob.smith@ca4software.onmicrosoft.com	Bob Smith Log C	Dut 📑
Homepage	Restore or download Dropbox Backup task: Full Dropbox Backup			
Jobs	Please select your preferred choice for restore			
G Recovery	O Via Snapshot 🔺			
8	● Via Item Search ∨			
Activity	Search for			
ی Settings	Item name Enter a term that matches a part of the file name Date from From initial backup Date to Today Clear Continue			

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

4.2 Tracking Recovery Tasks on the Jobs Page

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

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

From the Navigation pane, click Jobs.

4.2.1 High-Level Summary

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



٩				bob.smlth@ca4software.onmlcrosoft.com Bc	b Smith Log Out
Homepage	Jobs 💿 6 Total Jobs for last 7 Days				
Jobs	0 In Progress	5 Successfully Completed		X 1 Failures	
ectivity	(initiator v) (Activity v) (Service v) (Status v)			Q Search by Task V Search by Item V	Order by 🗸 🗸
ttings	Full Dropbox Backup Dropbox leonid@doudilly.com	Export			Succeeded
	Started at: Backup Date: Sep 21 2022 at 11:21 AM Sep 21 2022 at 06:05 AM	Initiator: bob.smith@ca4software.onmicrosoft	Destination: Direct Download	Total Items: 27	Size 7.78 MB
	Concel			Download Results	View Log
	Full Dropbox Backup Dropbox Testing team folder 1	Export			Succeeded
(C) upport	Started at: Backup Date: Sep 21 2022 at 10:44 AM Sep 21 2022 at 06:05 AM	initiator: bob.smith@ca4software.onmicrosoft	Destination: Direct Download	Total Items: 0	Size . () Help

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

4.2.2 Filtering

The next section allows you to filter by numerous criteria:

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



- **Status**: Filter by one of the following:
 - In progress
 - Succeeded
 - Partially succeeded
 - Failed
 - Pending
 - Canceled
- Search by Task: Filter by a task, such as:
 - MS Exchange
 - Teams/Groups
 - One Drive
 - Sharepoint

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

- Latest First
- Oldest First

4.2.3 Description of Each Job

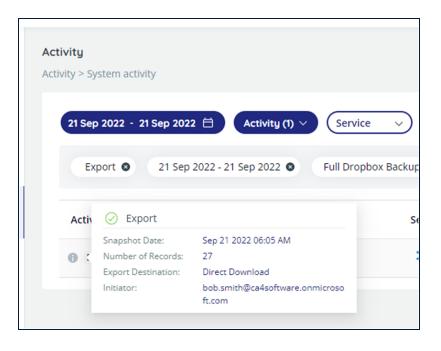
- The rest of the screen provides a detailed description of each individual job that you ran.
 - **Type of Job**: Export, or Restore this appears as a large title within each job description.
 - Name, Service, and Account of the job.
 - Start date, backup date, initiator, destination, total items backed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



٩							bob.smith@ca4software.onmicrosoft.com Bob Sr	mith 🛛 Log Out 📑
- Homepage	Activity Activity > System activity	ty						
Jobs	21 Sep 2022 - 21	Sep 2022 🗄 Activity (1) 🗸 Serv	ice v Status	$\overline{\checkmark}$		(Q ♥ Full Dropbox Bac >) (Q Bob.Smith@ca	4sof)
© Recovery	Export O	21 Sep 2022 - 21 Sep 2022 • Full Dr	opbox Backup 🜒 🛛 Bo	a.Smith@ca4softw 0				Clear Filters
& Activity	Activity	Date and Time	Service	Sub Service	Status	Task Name	Item	
(3) Settings	Export	Sep 21 2022 11:21 AM	\$		Succeeded	Full Dropbox Backup -	Bob.Smith@ca4software.onmicrosoft.com	0

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

The latter can be achieved by clicking ③ in the Activity column. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution:





5 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.

5.1 Viewing Account Activity

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

 Homepage	Activity	
Jobs	System Activity	Security Audit
Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
<u>م</u> Activity		
දි ා Settings		



5.1.1 System Activity

Click System Activity.

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

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

Homepage	Activity Activity > System activity						
Jobs	Start date - End	date 🛱 Activity 🗸	Service v (Status 🗸		Q Search by To	sk name - Q Search items C
Recovery	Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
8 Activity	Export	Jul 12 2022 04:08 PM	96	Calendars	 Succeeded 	Full MS Exchange Backup / bob.smith@ca.	. bob.smith@ca4software.onmicrosoft.com
© Settings	Backup	Jul 11 2022 01:01 PM	•		Succeeded	Sharepoint backup	/sites/AltaroRestored_Shared_mailbox_20 21_08_31_11_05
	Export	Jul 11 2022 01:00 PM	T	Channels	 Succeeded 	Full Teams Backup / AltaroRestored_Lind	AltaroRestored_Linda_Fuller_2021_08_31_0
	Restore	Jul 11 2022 01:00 PM	<u>ه</u>		Succeeded	One Drive / cloudally1-my.sharepoint.co	/2sepo_kazandev_pro
	Backup	Jul 11 2022 05:04 AM	96	Calendars	S Failed	Full MS Exchange Backup	Mila.Scott@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	96	Notes	Succeeded	Full MS Exchange Backup	Jacob.Anderson@ca4software.onmicrosoft. com
	Backup	Jul 6 2022 05:06 AM	96	Notes	 Succeeded 	Full MS Exchange Backup	Agata.Brown@ca4software.onmicrosoft.co m
	Backup	Jul 6 2022 05:06 AM	96	Notes	Succeeded	Full MS Exchange Backup	Alex.Duglas@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	96	Notes	 Succeeded 	Full MS Exchange Backup	Sarah Johnson@ca4software.onmicrosoft.c om
0	Backup	Jul 6 2022 05:06 AM	86	Notes	Succeeded	Full MS Exchange Backup	Jessica.Miller@ca4software.onmicrosoft.co m
Support	Backup	Jul 6 2022 05:06 AM	82	Notes	Succeeded	Full MS Exchange Backup	Charles.Wilson@ca4software.onmicrosoft.



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 ①. 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:

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

5.1.2 Security Audit

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

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

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

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

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



Page 30



Visit our Customer Support Hub

5.2 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.

Image: Problem in the security of the securit
Recovery & Solution Billing Manage account settings Manage other users Manage security settings Manage system notifications &
Billing Manage account settings Manage other users Manage security settings Manage system notifications &
Activity
Openant Settings

5.2.1 Account Settings

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

To update or change your account details:

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



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

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

5.2.2 Canceling Your CloudAlly Subscription

To cancel your subscription:

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

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

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



5.3 User Management

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

ttings > User Management						
he following external credentials are currently linked to your CloudAlly account						
u can remove the credentials anytir	me if you prefer to use only yo	our CloudAlly sign-in credentials				
				+ Add new u		
Email	Туре	2FA Authentication				
m.steward@cloudally.com	Email	۲				
j_armstrong@cloudally.com	Email	۲	08			
kristen_hall@cloudally.com	Email	۲	0 8			
	Page 1 of 1					

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

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



mail:	m.steward@cloudally.com	Type:	Email	\sim
assword		Role	Custom	~
Operations		~ Services		
General		All		
View Account setting pa	age 🕦	Microsoft E	xchange	
View billing page and m			iroups / Teams	
View support page 🕕	- · ·	Microsoft S	harePoint	
View account activity		Microsoft C	IneDrive	
Show all your support t	ickets	Google Acc	punt	
Manage Notifications		Salesforce		
View backups page 📵		Dropbox		
Backup Tasks		Box		
Activate new backup ta	sks 🕕	Google Wor	rkspace	
📃 Modify backup tasks 🌗		Google Sha	red Drives	
📃 Delete backup tasks 🐧		IMAP		
Pause backup tasks				
Execute backup tasks				
Cancel backup tasks				
View backups tasks				
Preview backed up data	a			
Restore backups				
Delete backup Items - 0	SDPR Right to Erasure			
Restore backups Export backups Delete backup Items - 0	3DPR Right to Erasure			

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

5.4 Security Settings

The Security Settings page enables you to:



- Update your password
- Set up two-factor authentication

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

Enforce The Following Password Policies On All Users		
🕑 Enforce Two-Factor Authentication on all users 🛛		
Password Expiration: Password expires after (days): 90		
	Cancel Save	



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

5.4.1 Changing Your Password for Credential-Based Authorization

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

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

Change password	×	
Current Password:		
Confirm New Password:		
	SAVE Cancel	

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



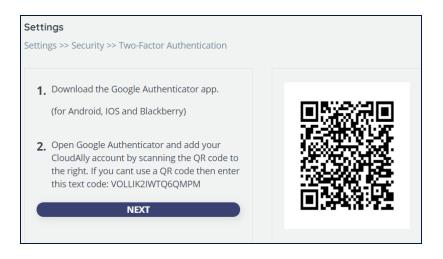
5.4.2 Two-Factor Authentication

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

To enable two-factor authentication:

1. Click Activate 2FA.

The Two-Factor Authentication page is displayed.



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

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



5.4.3 SAML

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

CloudAlly supports Okta as its SAML provider.

To set up Okta:

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



For further instructions, see the CloudAlly Okta User Guide.

5.4.4 IP Restrictions

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



Setting Up IP Restrictions

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

IMPORTANT!

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

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

٩		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
C Homepage	Settings Setting > Security	Email & Password: Active
Jobs	Password IP Restrictions SAML	
Recovery	IP Address Restrictions Settings	Your IP Address: 79.182.47.197
<u>Activity</u>	IP Address restrictions allow you to control who can access your account based on their IP address. Once you configure a set of functed 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 IP via succepted.	
(2) Settings	CAUTION: Make sure to add your own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being locked out of your account.	
	Trusted IP Addresses	+ Add IP Address
	IP Description IP Address	Actions
(C) Support		() Help

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



Ad	dd New IP Address		Your IP Address: 130.248.112.29		
Ente	er IP Address descrip	tion	(optional)		
e.g	g. Office				
You	ı can add one or mo	re IP addresses, or a rar	nge of IP addresses:		
۲	Trusted IP Address	es)			
	Separate multiple IP a	ddresses with ",".			
	Example 192.168.10.5				
	Trusted IP Address	Range			
	From	То			
	Example 192.168.10.0	- 192.168.10.255			
			Cancel Sav	e	

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

Add New IP Address	Your IP Address: 79.181.255.0
Enter IP Address description	(optional)
Secondary office	
You can add one or more IP addresses, or a range of IP a	ddresses:
 Trusted IP Address(es) 	
Separate multiple IP addresses with ",".	
	11
Example 192.168.10.5	
Trusted IP Address Range	
From To	
79.181.255.0 - 79.181.255.16	
Example 192.168.10.0 - 192.168.10.255	
	Cancel Save

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



٤)		username@cloud;	illy.com Jon Doe Log Out ⊡
Homepage	Security Settings Settings > Security		Email & Password: Active
Recovery	Password SAN	IL IP Restrictions	
Billing	IP Address Restriction	ons Settings	Your IP Address: 130.248.112.29
8 Security	Once you have configure a	w you to control who can access your account based on their IP address. 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 diress or a range of IP addresses. Only IPwI is accepted.	be blocked.
Settings	CAUTION: Make sure to add y	our own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being locked out of your account.	
	Trusted IP Addresses		+ Add IP Address
	IP Description	IP Address	Actions
	Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	1 🖻
0			
Support			

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

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

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

Blocking Access

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

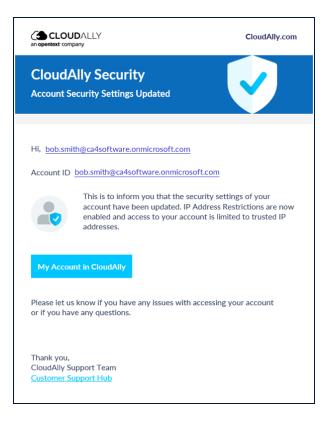


	 Home Free Trial 8, Log to
Sign In to your Account	
bob.smith@ca4software.onmicrosoft.com	
	ø
Eorgat your passment	
G Sign in with Google]
Sign in with Microsoft Sign in with Okta	J
 agniziwanowca 	J
Terms of Service and Privacy Statement	
powered by aws	



5.4.5 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.



5.5 Notifications Settings

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



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

The following screen will appear:

ummary Report 🛛 💽							
Report Format:							
Backup tasks overview 1	Preview		Re	eport Frequency:			
O Backup failure details 🕕	Preview		(Once A Day 🛛 🗸			
Provide as:							
CSV Attachment				Send the report only in case of backup failure			
Download Link							
							SAV
d Notifications To:						(+)	Add new rec
nd Notifications To:	Display Name	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery (j) Notification	Smart Alerts ()	Add new rec Action

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

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

To set up a new recipient:

- 1. Click + Add new recipient.
- 2. Enter the Email of the recipient and the Display name. The Display name is used in the report email to address the recipient.



- 3. Select the desired notification types:
 - a. Summary Report
 - b. Recovery Notification
 - c. Exceptions Notification
 - d. Auto Discovery Notification
 - e. Smart Alerts
- 4. Click **SAVE** to create the new recipient. You may need to scroll to the bottom of the page to find **SAVE**.

Settings Settings > Notifications > No	ew Email report			
User Info _{Email}			Display Name	
Notifications	Recovery Notification	Exceptions Notification	Auto Discovery Notification	
				SAVE Cancel



5.5.1





6 Managing Subscriptions and Payments

6.1 Subscribing to CloudAlly

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

To subscribe to a plan:

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

Billing Trial		
0	14 days left for your free trial, review yo	our billing details
(i) Choose yo	our subscription plan	MONTHLY ANNUAL
Service	Quantity	
	No records to view	
	Page 1	

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

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

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

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



6.1.1 Monthly Subscriptions

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

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

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

The initial payment will be charged at the end of your 2-week trial period. After you are charged each month, a receipt will be emailed to you.

If CloudAlly is unable to charge your credit card (e.g., because it has expired), you will be notified by email. Additionally, a message will appear in the application that you need to go to the *Billing Status* page so you can review your billing details, and then update your credit card information if necessary.

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



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

6.1.2 Annual Subscriptions

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



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

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

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



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

CLO an opentext co	UDALLY Cloud to Cloud Backup	Invoice Overdue: Please pay your annual subscription.	Updated on: Nov 06, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
Homepage	Billing Billing > Status			
Jobs	Note: The billing status is update	ed once a day. If you made any recent payments it will be refle	cted in the next 24 hours.	

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.



6.2 Payment Details

 Homepage	Billing Annual subscription, Renewal Date: Aug 18th 2022						
Jobs	Status	History	Payment Details				
Recovery	(5)						
G Billing	Billing status of clients	C	Change your payment details				
Activity	Shing states of cherrs		enange your payment actains				
දි හි Settings							

The Payment Details page contains the information used for billing.

6.2.1 Monthly Subscriptions

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

O Homepage	Billing Billing > PaymentDetails			
≘	Monthly subscription, next payment: Nov			
Jobs	 Credit Card Details Card Number: 	CREDIT: X000-X000-1111 (12/2023) ~		
Billing				ADD NEW CARD ACTIVATE CARD Delete card
8 Activity				
ن Settings	~ Billing Details			
	Currency:	USD V	Title:	Mr 🗸
	* First Name:	Test	* Last Name:	Tst
	* Billing Email:	mon.billing.email@cloudrein.com	Company Tax Id:	CloudAlly
	* Company Name:	CloudAlly	*Address Line 1:	Kamal, 40
	Address Line 2:		Address Line 3:	
	*Country:	AmericanSamoa V	State:	
	*City:	Kazan	*Zip Code/Postal Code:	111111
	* Phone number:	89876543210	Email Invoice/Receipt:	Link Attachment
(D) Support				⑦ Help



6.2.1.1 Add New Card

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

Billing						
Billing >> Payment details						
Monthly subscription, next	payment: Dec 13th 2020					
~ Credit Card Det	ails					
Card Number:	undefined: XXXX-XXXX-XX	XX-444 🗸				
				ADD NEW CARD	ACTIVATE CARD	Delete card
Add new card of	letails					
Card Holder's Name:	Card Holder's Name:					
Card Number:	Card Number	MM / YY	CVV			
card Number.	Gard Humber		000			
					A	DD NEW CARD

To create a new payment method:

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

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



6.2.1.2 Change Payment Method

To change your existing payment method:

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

Billing						
Billing >> Payment details	5					
Monthly subscription, next payment: Dec 7th 2020						
~ Credit Card De	etails					
Card Number:	CREDIT: XXXX-XXXX-5048 (1 🗸					
	CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)					
	CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)	ADD NEW CARD ACTIVATE CARD Delete card				

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

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

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



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Johnox Osei	Guide
Managing Sub	scriptions and Payments

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

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

At the bottom of the page, you can choose whether you want to receive the Invoices or Receipts as a link or as an attachment to the email.

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



6.2.2 Annual Subscriptions

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

0	Billing		
Homepage	Billing > AnnualSubscription		
≘	Annual subscription, Renewal Date: Oct 19th 2023		
Jobs	✓ Billing Details		
Recovery	Subscription Starting Date:	November 3, 2022	
G	Currency:	USD	~
Billing	* Country:	United States	~
Activity	*State:	New York	~
0	*City:	New York	
Settings	*Zip Code/Postal Code:	01234	
	* Company Name:	CloudAlly	
	Company Tax Id:	CloudAlly	
	* Company Address:	14652 Broadway	
	Purchase Order Number (Optional):	4350123	
	. Dilling sectors		
	~ Billing contact		
	*First Name:	Bob	
	*Last Name:	Smith	
(C) Support	* Billing Email:	ann2@cloudrein.com	() Help



6.3 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.

CLOI	JDALLY Cloud to Cloud Backup			bob.sm	nith@ca4software.onmicrosoft.com Bob Smith Log Out		
O Homepage	Billing Billing > Status						
]obs	Note: The billing status is updated once a day. If you made any recent payments it will be reflected in the next 24 hours.						
G Recovery	Subscription Pay Annual Pai	ments status Next renewal date id Sep 12, 2023	Forecast for next payment \$226.80				
Billing	Payment Forecast						
Activity	Service	Total Quantity	Billable Quantity	Unit Price	Total Amount		
Settings	MS Exchange (365)	6 mailboxes	6 mailboxes	\$37.80	\$226.80		

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

CLC	OUDALLY Cloud to Clou	ud Backup 🔺 Invoice Overdue: Please pay you	r annual subscription.	Updated on: Nov 06, 2022	bob.smith@ca4software.onmicrosoft.	com Bob Smith Log Out 🕂
Homepage	Billing Billing > Status				Invoice was see An email was sent to bob.smith@ca4softwar with your invoice and a credit card or PayPal.	
9	Note: The billing status is	s updated once a day. If you made any recent payme	nts it will be reflected in the next 24 hours.			
Recovery Billing	Subscription Annual	Payments status Amount Due \$75.96				
Activity	Overdue Invoices					
Activity {}}	Issue Date	Status	Due Date	Total Amount	Download Invoice	Email Invoice
Settings	Jan 19, 2022	Overdue	Feb 19, 2022	\$75.96	575 👱	e nd your invoice with an
						ok to gay office, obt

You can click $\stackrel{\checkmark}{=}$ to download the invoice, or you can click $^{\odot}$ to receive an email version of your invoice, with the option to pay online either by PayPal or credit card.



Monthly

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

DALLY Cloud to Clary	oud Backup	Payment Failed: Unable to charge your or	edit card.	Updated on: Nov 07, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out
Billing Billing > Status					
Note: The billing statu	is updated once a d	ay. If you made any recent payments it w	ill be reflected in the next 24 hours.		
Subscription Monthly	Payments status Amount Due \$51.5	2			Update <u>credit card detalis</u>
Unpaid Bills					
Issue Date		Due Date	Total Amount		
Jun 20, 2022		Jun 20, 2022	\$12.88		
May 20, 2022		May 20, 2022	\$12.88		
Apr 20, 2022		Apr 20, 2022	\$12.88		
Mar 20, 2022		Mar 20, 2022	\$12.88		

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



6.4 History

This page displays the history of payments.

Billing							
Billing >> History							
Monthly subscription, next payment	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	\$49.40				
66837 🗘	August 13, 2020	August 15, 2020	\$44.65				
		Page 1 of 1		Showing 1-4 of 4			

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

An example of a receipt is displayed below.



To: pizza-pe	rfecto.com – PPV001	CloudAlly	Ltd.	
Pizza Perfecto 18 Mozarella L United Kingdo		Tax ID: 5145 12 Harimon Israel www.clouda accounting(st., Gan Ha ally.com	yyim 4491000, .com
Invoic Certified Copy	e / Receipt 51646	26 Apr 2021		
	Receipt for admin@pizza-perfecto.com, 1 ye		• •	•
QTY	Description		Price	Total
70	Dropbox 696.56 GB	16.25	5 GBP	1,137.50 GBP
		Sul	btotal	1,137.50 GBP
		VA	AT 0%	0.00 GBP
		Total pa	yable	1,137.50 GBP
Payments D	Details			
Туре	Description	Date		Amoun
PayPal	Account 12345678 / Transaction # 987654321	26 Apri	2021	1,137.50 GBF
			Total	1,137,50 GBF
Paid with P	ceipt for Proforma Invoice 11392 ayPal kccount: KQMTW2PHR5CUG			



Dropbox UG CE 22.04.01 Rev. Date: December 4, 2022

6.5 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**.
- 3. Click "View billing notification messages" on or off.

O Homepage	Settings Settings > User Management > New user				
⊒ Jobs	Email:	bob.smith@ca4software.onmicrosoft.com	Туре:	Email	
© Recovery	Password		Role	Custom 🗸	
Billing	~ Operations		~ Services		
<u>گ</u> Activity	General View Account setting page		All Microsoft Exchange Microsoft Groups / Teams		
© Settings	View billing notification messa	ages 🕦	Microsoft SharePoint Microsoft OneDrive		
	View account activity ① Show all your support tickets		Google Account Salesforce		
	Manage Notifications View backups page		Dropbox Business		
	 Backup Tasks Activate new backup tasks () 		Google Workspace Google Shared Drives		
	Modify backup tasks ① Delete backup tasks ①		IMAP		



7 Support Pages

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

CLOUDALLY CUSTOMER SUPPORT HUB	← Back to CloudAlly	Free Trial Open a Ticke	Sign in Partner Sign in
	How can we help?		
Search this help center		Q	
1) Office 365 🖬	SharePoint 🗠 OneDrive 🗙 🎰 🏷 Dropbox	G Suite	
	re to help you eam is available 24 hrs 365 Day		

CloudAlly provides multi-channel support options:

Phone Numbers:

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

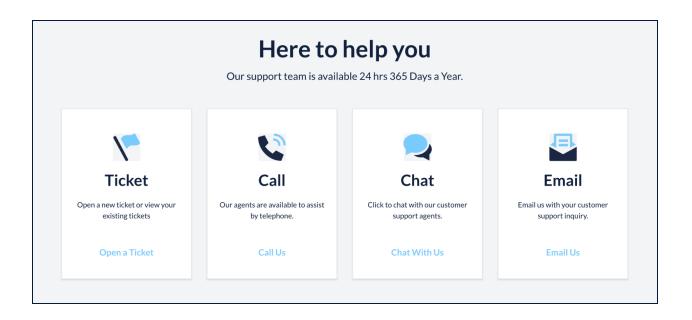
Email Addresses:

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

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



Visit our Customer Support Hub



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.

